

Written evidence submitted by Dr. Keith Dear, CEO Cassi.**The UK and the Chances of Involvement in Major Conflict in the Next Ten Years**

This evidence is supplementary to that provided in person to the **House of Commons Defence Committee One-Off evidence session on the future of warfare** on 3 February 2026. I was asked for a probabilistic assessment of the likelihood of the UK being in a major conflict before 31 December 2036. This note responds.

Key Insights

1. The current probability of such a conflict is forecast at 20%. A one-in-five chance of major conflict.
2. The forecasts suggest that if the UK consistently spends 3% of GDP on a 5-year average basis by 2036, then the probability of the UK being involved in a major conflict drops by 50% in relative terms: from 20% to 10%. A drop from one-in-five to one-in-ten.
3. However, the AI forecast is that the UK is highly unlikely (~70% chance) to spend 3% of GDP on a 5-year average basis by 2036.
4. The AI forecast suggests the UK is also highly unlikely (~70%) to spend over 3% GDP defence spending at all before 2030. Similarly, the UK is highly unlikely to re-introduce the War Book¹ (25%) in this time. Cassi forecasts that the UK will likely only reintroduce the War Book or get to 3% defence spending on GDP if there is a war, not before.

Source of the AI Forecasts

To deduce these probabilities, we used Cassi, ranked #1 on the independent Forecast Research Institute's ForecastBench – a league table for the best AI forecasters² - to assess the probability of the UK being a participant in a major conflict, as defined³ below, between the present and 2036.

Further Probabilistic Assessment & Discussion

Conflict with Russia before 2036 is forecast at 17% - sufficiently close to the likelihood that there will be a major conflict to imply that if the UK were to be involved in a major conflict, it is most likely to be with Russia. The probability of the UK being involved in major conflicts (defined by # of UK casualties) against countries such as Iran and China are ~5% likely.

In the Indo-Pacific, the chance of a China-Taiwan conflict is currently 26% but the outbreak of a China-Taiwan conflict only increases the likelihood of the UK being involved in a major conflict by +11%, suggesting that the UK would be unlikely to be sufficiently involved to suffer enough casualties to meet the 'major conflict' threshold. Therefore, all indicators further upstream of this, such as China's growth rate or its continued military expansion, have limited effect on the likelihood of the UK being involved in a major conflict.

To understand the impact of China's growth rate, military expansion, or other upstream indicators of the probability of war between China and the US, China and Taiwan (etc.) we would need to run specific forecasts against these outcomes. For the Committee, the primary insight to draw here is the overall 20% forecast and

¹ The War Book was maintained by Britain from publication of the first plan for national mobilisation in 1911 until the early 2000s, when it was quietly discontinued. Today the UK has no national mobilisation plan, despite the frequent warnings from Ministers and MPs of the rising likelihood of war. <https://news.sky.com/story/its-hard-to-imagine-how-the-uk-could-be-doing-less-to-prepare-for-war-13106724>

² Cassi is the company at which the author is CEO and Co-founder. Details on the company's current accuracy and calibration are on the company's Substack here <https://blog.cassi-ai.com/p/humanitys-last-exam-for-forecasting>.

In short: Cassi is #1 AI Forecaster on ForecastBench, outperforming most humans, and performing close to the weighted superforecaster mean – close to the best predictions humanity can make under uncertainty. The company is the #1 AI forecaster on Metaculus' Peer Scoring Leaderboard. As with Cassi's forecasts on ForecastBench and Metaculus, the probabilities here are derived entirely from publicly available, web-based information.

³ For this note, we define a major conflict within the forecastable question: *Will a conflict in which there are more than 500 UK service personnel deaths; or the deaths of more than 250 UK service personnel in a conflict in which there were over 10,000 combatant deaths in total occur before end 31 December 2036?* See definitions later in this report for a more in depth discussion of this for interested readers.

the Russia-specific 17% forecast imply that most of the residual risk is concentrated there. It says nothing as to how involved the UK should be in other wars. It merely says what is likely.

Similarly, we solely forecast on the question of whether the UK would likely avoid a major conflict to 2036, and those things that indicate a war would be more or less likely – we were interested in identifying those things that the UK could do to maximally decrease the likelihood of war. We included only those things discussed in the evidence session I attended. We are able to generate AI indicators – what the AI suggest will be most influential on the outcome – but have not done so here.

At the time of writing the UK's continued participation in a defensive alliance with the USA is the single most important factor associated with a lower likelihood that the UK is in a major conflict before 2036. Cassi is confident that this alliance will endure over this period (88%) despite the current noisy political uncertainty on the issue. However, were the alliance to end, Cassi forecasts that the chances of the UK being involved in a major conflict increases by 39%.

After the UK-US alliance, the next three non-causal indicators most strongly associated with the forecast outcome are mixed in direction:

1. A change of UK government before 2036 (83% likely). In the model, this is associated with a lower probability that the UK avoids a major conflict.
2. Continuing global temperature increases (90% likely). In the model, this is associated with a higher probability that the UK avoids a major conflict.
3. A general increase in the number of interstate wars (74% likely). In the model, this is associated with a lower probability that the UK avoids a major conflict.

These are primarily indicators, not policy levers. The first and third likely reflect an unstable domestic political and geopolitical environment. They are indicators that the UK should track, to understand the rising or falling risk of a major conflict.

Global temperature increases is interesting for showing how the AI reasons. In the event of a major conflict, economic activity declines – so if there is a war, emissions would likely reduce, and global warming slow down. Furthermore, if the UK is involved in a major conflict there is the tail risk of a nuclear war and a following nuclear winter – where global warming would stop. So *increasing* global temperatures correlate with it being more likely the UK avoids war.

Most UK activity (e.g. over 3% GDP defence spending before the 2030s (29% likely), the re-introduction of the War Book (25%)) was correlated with *increased* chances of major conflict. This is because the AI forecasts that the UK will only reintroduce the War Book or get to 3% consistently if there is a major conflict, not in advance of it.

Other than aligning ourselves with the US, we have to go to the ninth most important factor on the list to find anything the UK can do that meaningfully reduces the chances of conflict, and this is whether or not the UK will be spending over 3% of GDP on Defence on a 5-year average basis by 2036. Here Cassi forecasts that there is a ~70% chance the UK will not achieve this, but that if the UK did it, it would increase the likelihood the UK avoids a major conflict by ~10%, up from ~80% likely to ~90% likely, or in the inverse, it would reduce the probability of war by 50%, from 20% to ~10%.

The arrival of AGI⁴ - in this timeframe (61% likely), even if China has it (33%) is associated with quite modest increases in the possibility of major conflicts (+9% and +6% respectively). The rationales here emphasise the modest destabilising effect of AGI in this timeframe being offset by the possibility of lower casualty rates in conflict due to increased automation (and thus not reaching the thresholds of casualties required to 'count' as a major conflict – see definitions below). To quote Cassi: "AGI introduces countervailing effects: greater geopolitical instability versus substantial substitution to unmanned systems and improved ISR/defence/medicine that reduce UK service fatalities. Given the outcome hinges on UK death thresholds rather than conflict occurrence per se, the casualty-reducing effects of advanced AI likely dominate modestly"; and "China's attainment of AGI could modestly increase global great-power competition and escalation risks, thereby slightly elevating the chance of the UK becoming involved in a major conflict. However, due to the high casualty thresholds and the complex, contingent causal chain, this influence is viewed as limited...even if China achieves AGI."

⁴ For the extended definition of AGI as used by Cassi's AI forecaster, see <https://www.metaculus.com/questions/5121/date-of-artificial-general-intelligence/>

We have concentrated only on the desired outcome that ‘the UK avoids involvement in a major conflict to 2036’. However, the Committee is likely interested in more than just the likelihood of war, but also what the UK can do to maximally deter war, to maximise its chances of winning a future war, how the UK can optimally secure its interests, and, again relatedly, how it can optimise its relative power in the international system, while also seeking to maximise the UK’s relative and absolute prosperity. Not all of these outcomes are likely to be wholly complementary. There will be probabilistic trade-offs if you pursue one over another – making one more likely may make another less likely. The balance across them is something Cassi can help with, making the trade-offs explicit, and legible. However, what the outcomes should be remains the core of politics. One of the things Cassi helps to show is how fuzzily we, as humans, tend to define our desired outcomes, if we define them at all.

It is for that reason that we must detain you with a brief definitional discussion.

Definitions

In forecasting it is important to be specific so that the probabilities assigned are accurate and well calibrated. For example, we might assume that ‘a major conflict’ is a well understood term. But in practice, if we were to ask all Committee members, or an equivalent number of members of the public, what specifically they mean by this, we expect we would get different answers. Here, we define ‘major conflict’ as:

Major Conflict - a conflict in which there are more than 500 UK service personnel deaths; or the deaths of more than 250 UK service personnel deaths in a conflict in which there were over 10,000 combatant deaths in total.

This definition is derived from the [Wikipedia convention](#) of distinguishing between major conflicts from minor at the threshold <10,000 deaths. Neither the Iraq (179 total deaths) nor Afghanistan (457) wars would reach the 500 UK service personnel deaths threshold, nor the Falklands (255), whereas the Korean war (1100) would.

The separation of 500 UK deaths from 250 in a conflict of >10,000 combat deaths is to allow the forecast to encompass ‘major conflict for us, the UK’, alongside ‘a major conflict in which we are significantly involved’.

The specificity in definition surfaces disputes early, making sure we are all talking about the same thing. It also makes it harder for people to argue later over whether the desired endstate, in this case whether or not the UK avoids a major conflict, has or hasn’t happened. It also allows forecasters to be specific in what they are predicting.

There is of course scope to dispute most if not all definitions. Ours is no different.

Perhaps in asking the question of me the Committee means that major conflict is simply ‘war with Russia or China’ with all other conflicts being lesser. Or perhaps a ‘conflict’ that falls short of war counts (though this asks for a definition). Here we have settled on what we think would count as a major conflict. We recommend the Committee discuss and challenge this, defining more clearly what would meet their threshold. Even without formal forecasting, this is a helpful discipline – making clearer what you are diagnosing enables tailored and effective remedy – we won’t get our force structures right, unless we plan against a realistic scenario against a real adversary. The alternative is to spread bet – which is what gave us the ‘balanced force’ – one not properly funded or designed to do anything fully, able to contribute some capabilities, to all types of operation, everywhere, incapable of doing anything very well.

To forecast the desired endstate, we make it a question *Will a conflict in which there are more than 500 UK service personnel deaths; or the deaths of more than 250 UK service personnel in a conflict in which there were over 10,000 combatant deaths in total occur before end 31 December 2036?*

We recommend that the Committee submit themselves to the discipline of thinking through and making their own forecast on the likelihood of this. If recommendations on what to do to prepare for future wars are to be made proportionate to the risk/threat, understanding the probability of the risk/threat is essential.

A final note – on objections to the AI forecasts: it is reasonable to contest the AI forecasts. Like any forecaster, they can be wrong. However, those objecting should commit themselves to the discipline of making their own probabilistic judgement, and scoring their accuracy (how often they are right), and calibration (if they forecast everything at 80% likely, and those things happen 80% of the time, they are perfectly calibrated, any gap suggests a miscalibration, and can be scored over time to identify whose judgement is most trustworthy). A common objection is that you can’t assign probabilities, and to do so is an error. In reality, you are making a probabilistic judgement in every if/then decision or recommendation you make. You cannot *not* predict. Or as Cassi describes in its [tagline](#) and [blog](#) ‘Everything is Prediction’.