

POLICY BRIEF

How Much Risk is There of a Nuclear Cascade in Northeast Asia?

A 'nuclear cascade' is often pictured as a set of dominoes: one state acquiring nuclear weapons triggers copycat decisions by its rivals. In practice, cascades rarely unfold as instantaneous reactions. They are more often sequences of political choices in which governments gradually lower the barriers to a nuclear option – through public debate, legal reinterpretation, fuel-cycle decisions and institutional preparation – until the threshold becomes easier to cross than to avoid.¹

This is not a purely theoretical concern. Even when a cascade does not culminate in new nuclear-armed states, fear of this can reshape alliance politics, crisis behaviour and arms-control diplomacy. Once a public and bureaucratic conversation about 'the nuclear option' becomes normalised, it tends to return whenever threat perceptions spike or when confidence in allied protection decreases.²

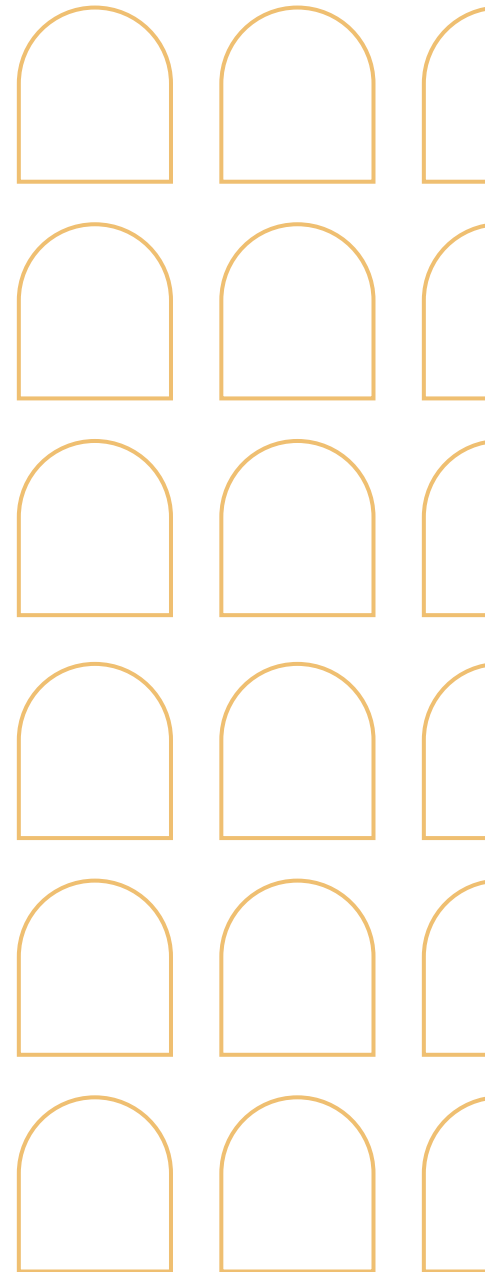
Northeast Asia concentrates many of the conditions that make cascade dynamics plausible: an entrenched nuclear-armed North Korea; a

1 Scott D. Sagan, "Why Do States Build Nuclear Weapons? Three Models in Search of a Bomb," *International Security* 21, no. 3 (Winter 1996/97): 54-86, <https://doi.org/10.1162/isec.21.3.54>; Graham Allison, "A Cascade of Nuclear Proliferation," *International Herald Tribune*, 17 December 2004, accessed 20 December 2025, <https://www.belfercenter.org/publication/cascade-nuclear-proliferation>.

2 Richard Nephew, "What the U.S. Can Do to Guard Against a Proliferation Cascade in the Middle East," *Brookings*, 2 June 2016, accessed 20 December 2025, <https://www.brookings.edu/articles/what-the-u-s-can-do-to-guard-against-a-proliferation-cascade-in-the-middle-east/>.

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rapidly expanding Chinese arsenal; and two highly capable U.S. allies (Japan and South Korea) that rely on extended deterrence while also possessing advanced civilian nuclear industries, sophisticated missile and space sectors, and the industrial base to move quickly if political constraints erode. The 'cascade' risk here is therefore less of a sudden decision to test a weapon than one of cumulative erosion of regional non-proliferation equilibrium.³

The argument developed below follows a three-step process: (1) North Korea continues to use its nuclear status and growing missile forces to coerce and divide U.S. alliances; (2) China's quantitative and qualitative nuclear build-up reinforces perceptions of strategic encirclement and raises doubts about escalation control; and (3) these pressures – filtered through perceptions of U.S. reliability – push Japan and then South Korea toward a posture of 'threshold capability,' even if formal weaponisation remains politically contested. The analysis focuses primarily on Japan. South Korea is discussed only insofar as it shapes Tokyo's strategic environment and alliance politics. The prospect of Taiwan becoming nuclearised seems to be purely historical.⁴

1. North Korea: from accomplished proliferation to coercive leverage

North Korea has turned what began as a covert proliferation project into a mature deterrent. This

record matters because it normalises the DPRK's nuclear identity. Pyongyang now treats nuclear weapons not as bargaining chips but as the core of regime security and a tool for shaping the behaviour of South Korea, Japan and the United States.⁵

1.1. The milestones that made the DPRK a durable nuclear actor

In the conventional narrative of proliferation, North Korea's key 'point of no return' came with the breakdown of safeguards and its withdrawal from the Nuclear Non-Proliferation Treaty (NPT), followed by its first nuclear test in October 2006. The IAEA's historical record of safeguard disputes and the Comprehensive Nuclear-Test-Ban Treaty Organization (CTBTO)'s public information on detected DPRK tests show that the programme progressed despite sanctions and intermittent diplomacy.⁶

1.2. Current status: warheads, fissile material and deliberate uncertainty

Open-source assessments vary, but a common picture is that North Korea has assembled several dozen nuclear warheads and possesses fissile material for significantly more. The uncertainty is itself a strategic asset. In a crisis, ambiguity complicates allied planning and feeds worst-case assumptions. For Japan and South Korea, this uncertainty amplifies the psychological effect of DPRK threats, because it blurs the line between

3 Timothée Albessard, *Japan's Nuclear Latency: A Dual-Use Diplomatic Lever?* Report No. 93 (Paris: Institut de Recherche Stratégique de l'École Militaire [IRSEM], May 2022), accessed 20 December 2025, https://www.irsem.fr/storage/file_manager_files/2025/03/etude-irsem-93-albessard-japan-en-v2.pdf; James M. Acton, "Wagging the Plutonium Dog: Japanese Domestic Politics and its International Security Implications," *Carnegie Endowment for International Peace*, 29 September 2015, accessed 20 December 2025, <https://carnegieendowment.org/research/2015/09/wagging-the-plutonium-dog-japanese-domestic-politics-and-its-international-security-implications>.

4 Jeffrey T. Richelson, *Spying on the Bomb: American Nuclear Intelligence from Nazi Germany to Iran and North Korea* (New York: W. W. Norton & Company, 2006), xx–xx.

5 Arms Control Association, "Arms Control and Proliferation Profile: North Korea," last reviewed June 2024, accessed 20 December 2025, <https://www.armscontrol.org/factsheets/arms-control-and-proliferation-profile-north-korea>; Mary Beth D. Nikitin, *North Korea's Nuclear Weapons and Missile Programs* (CRS In Focus IF10472) (Washington, DC: Congressional Research Service, 23 May 2025), accessed 20 December 2025, <https://www.congress.gov/crs-products/product/pdf/IF/IF10472/29>; Ankit Panda, *Kim Jong Un and the Bomb: Survival and Deterrence in North Korea* (London: Hurst Publishers, 2020), accessed 20 December 2025, <https://www.hurstpublishers.com/book/kim-jong-un-and-the-bomb/>.

6 International Atomic Energy Agency (IAEA), "Fact Sheet on DPRK Nuclear Safeguards," accessed 20 December 2025, <https://www.iaea.org/newscenter/focus/dprk/fact-sheet-on-dprk-nuclear-safeguards>; Comprehensive Nuclear-Test-Ban Treaty Organization (CTBTO), "DPRK Nuclear Tests," accessed 20 December 2025, <https://www.ctbto.org/our-work/dprk-nuclear-tests>.

deterrence signalling and preparation for first-use options.⁷

1.3. Doctrine and escalation: the 2022 nuclear policy law and coercive signalling

Pyongyang has reinforced its commitment in law and doctrine. The DPRK's 2022 nuclear policy law asserts that nuclear forces are under the "monolithic" command of the state leadership while it also describes circumstances in which nuclear use could be authorised, including scenarios that resemble pre-emption or automatic retaliation if command and control are threatened. Analysts read the law as both an attempt to strengthen deterrence and a potential source of instability, because fears of 'decapitation' can create incentives for early use in a fast-moving crisis.⁸

The DPRK does not rely on nuclear weapons alone for coercion. It combines nuclear signalling with high-frequency missile launches, conventional artillery threats, cyber operations (including ransomware and destructive malware) and calibrated grey-zone actions. Since 2022, the pace of ballistic missile activity has remained extraordinarily high, which reinforces the perception in Seoul and Tokyo that Pyongyang is rehearsing for wartime operations and for crisis manipulation short of full-scale conflict.⁹

In the short to medium term, the most likely coercive pattern is not an attempt to 'conquer' South Korea or Japan, but to make allied political cohesion

harder; to press for sanctions relief or recognition; to threaten selective escalation against Japan or U.S. bases; and to exploit any sign of U.S. hesitation to drive wedges between Washington, Seoul and Tokyo. DPRK messaging routinely frames denuclearisation as off the table and demands that others accept the status quo – thus shrinking the diplomatic space for managing escalation while raising the domestic appeal of indigenous nuclear options among U.S. allies.¹⁰

2. China's nuclear armaments: expansion as a structural accelerator

China's nuclear modernisation is the second structural driver. For decades, China maintained a relatively small deterrent oriented toward assured retaliation. Over the last several years, however, multiple independent assessments have documented rapid growth in warhead numbers, expanding delivery systems across the triad and large-scale construction of new missile infrastructure. The turning point came with the US withdrawal from the Intermediate-Range Nuclear Forces Treaty in 2019. While the Trump administration publicly grounded the decision in Russia's non-compliance, it also pointed to China's unconstrained deployment of INF-range systems and their perceived threat to US interests in the Asia-Pacific region as an additional factor. However, it was China's expanding intermediate-range missile forces that played a pivotal role in the broader strategic

7 Stockholm International Peace Research Institute (SIPRI), "World Nuclear Forces," *SIPRI Yearbook 2025: Armaments, Disarmament and International Security*, accessed 20 December 2025, <https://www.sipri.org/yearbook/2025/06>; Hans M. Kristensen, Matt Korda, Eliana Johns and Mackenzie Knight, "North Korean Nuclear Weapons, 2024," *Bulletin of the Atomic Scientists* 80, no. 4 (2024): 251-271, <https://doi.org/10.1080/00963402.2024.2365013>.

8 Korean Central News Agency (KCNA), "Law on DPRK's Policy on Nuclear Forces Promulgated," 9 September 2022 (English translation by GlobalSecurity.org), accessed 20 December 2025, <https://www.globalsecurity.org/wmd/library/news/dprk/2022/dprk-220909-kcna01.htm>; Paul I. Bernstein and Shane Smith, "Through a Glass, a Little Less Darkly: North Korean Nuclear Command and Control in Light of Recent Developments," 38 *North*, 14 November 2022, accessed 20 December 2025, <https://www.38north.org/2022/11/through-a-glass-a-little-less-darkly-north-korean-nuclear-command-and-control-in-light-of-recent-developments/>.

9 Associated Press, "UN Condemns North Korea's Latest Missile Launch as It Marks 100 Launches Since 2022," 4 April 2024, accessed 20 December 2025, <https://apnews.com/article/5f78bb1a9ff3d5edb223a8ead98712ec>; Nikitin, *North Korea's Nuclear Weapons and Missile Programs*, cit.; U.S. Department of the Treasury, "Treasury Targets DPRK Malicious Cyber and Illicit IT Worker Activities," 23 May 2023, accessed 24 December 2025, <https://home.treasury.gov/news/press-releases/jy1498>; U.S. Department of the Treasury, "Sanctions Imposed on DPRK IT Workers Generating Revenue for the Kim Regime," 8 July 2025, accessed 24 December 2025, <https://home.treasury.gov/news/press-releases/sb0190>; Ministry of Foreign Affairs of Japan, "MSMT/2025/2" (PDF), accessed 24 December 2025, <https://www.mofa.go.jp/mofaj/files/100922718.pdf>.

10 Reuters, "North Korea Tells UN: We Will Never Give Up Nuclear Program," 29 September 2025, accessed 20 December 2025, <https://www.reuters.com/world/asia-pacific/north-korea-tells-un-we-will-never-give-up-nuclear-program-2025-09-29/>; Reuters, "North Korea Says Its Status as a Nuclear Weapons State Can Never Be Reversed, KCNA Says," 8 April 2025, accessed 20 December 2025, <https://www.reuters.com/world/asia-pacific/north-korea-says-its-status-nuclear-weapons-state-can-never-be-reversed-kcna-2025-04-08/>.

context, rendering INF constraints not politically and technically sustainable for Washington.¹¹

This shift does not automatically translate into imminent Chinese nuclear use, but it changes the reference point against which Japan and South Korea judge the regional balance. For U.S. allies the significance is that a larger and more survivable Chinese force can heighten ‘decoupling’ anxieties by raising the perceived costs of U.S. intervention in crises near China’s periphery.¹²

SIPRI estimates that China had at least 600 nuclear warheads by early 2025 and that it has been adding roughly 100 warheads a year since 2023 – making China’s arsenal the fastest-growing in the world. The U.S. Department of Defense projects that China’s stockpile could surpass 1,000 by 2030. These numbers are necessarily uncertain and depend on assumptions about how many new silos will be loaded and how China manages readiness, but the strategic implication is clear: the era in which China’s nuclear forces could be treated as a ‘minimum’ backdrop to U.S.-Russia nuclear dynamics is over. Many analysts interpret the expansion as at least partly reactive – shaped by

concerns about U.S. missile defence, an advanced conventional strike and broader deterioration of U.S.-China strategic trust.¹³

One visible feature of the build-up is construction of new intercontinental ballistic missile (ICBM) silo fields. Open-source imagery analyses have identified multiple large fields under construction in northwestern China, which are consistent with a shift toward greater survivability and potentially a larger deployed force. Even if some silos remain empty or are used for shell-game practice, the infrastructure itself complicates adversary targeting and supports higher readiness options.¹⁴

Beijing has also signalled a more confident posture with demonstrations of strategic capability. In September 2024, for example, China’s PLA launched an intercontinental ballistic missile into the Pacific Ocean – an event widely reported as unusual in its public visibility. Such signals are read in Tokyo not only as messages to Washington but as indicators that regional crises (including regarding Taiwan) could carry nuclear shadow effects. In practice, any high-intensity Taiwan contingency involving U.S. forces would unfold under a nuclear

11 Bates Gill, Exploring post-INF arms control in the Asia-Pacific: China’s role in the challenges ahead (London: The International Institute for Strategic Studies, June 2021), 2, <https://www.iiss.org/globalassets/media-library---content--migration/files/research-papers/exploring-post-inf-arms-control-in-the-asia-pacific---chinas-role-in-the-challenges-ahead.pdf> (accessed 29 December 2025).

12 U.S. Department of Defense, Military and Security Developments Involving the People’s Republic of China 2024 (Annual Report to Congress) (Washington, DC: Department of Defense, 2024), accessed 20 December 2025, <https://media.defense.gov/2024/Dec/18/2003615520/-1/-1/0/MILITARY-AND-SECURITYDEVELOPMENTS-IN-VOLVING-THE-PEOPLES-REPUBLICOF-CHINA-2024.PDF>; SIPRI, “World Nuclear Forces”, cit.; Hans M. Kristensen, Matt Korda, Eliana Johns and Mackenzie Knight, “Chinese Nuclear Weapons, 2025,” *Bulletin of the Atomic Scientists* (Nuclear Notebook) (2025), accessed 20 December 2025, <https://fas.org/wp-content/uploads/2025/03/Chinese-nuclear-weapons-2025.pdf>.

13 SIPRI, “World Nuclear Forces”, cit.; U.S. Department of Defense, *Military and Security Developments Involving the People’s Republic of China 2024*, cit.; Kristensen et al., “Chinese Nuclear Weapons, 2025,” accessed 20 December 2025, <https://fas.org/wp-content/uploads/2025/03/Chinese-nuclear-weapons-2025.pdf>; Tong Zhao, “Understanding Chinese and Russian Views on U.S. Missile Defense,” *American Academy of Arts and Sciences Bulletin*, Spring 2024, accessed 24 December 2025, <https://www.amacad.org/bulletin/spring-2024/understanding-chinese-and-russian-views-on-us-missile-defense>; Nathan McQuarrie, “Why China has not acted on Western warnings to ‘disentangle’ conventional and nuclear missile capabilities,” *Bulletin of the Atomic Scientists*, 22 August 2025, accessed 24 December 2025, <https://thebulletin.org/2025/08/why-china-has-not-acted-on-western-warnings-to-disentangle-conventional-and-nuclear-missile-capabilities/>.

14 Federation of American Scientists, “China is Building a Second Nuclear Missile Silo Field,” 26 July 2021, accessed 20 December 2025, <https://fas.org/blogs/security/2021/07/china-is-building-a-second-nuclear-missile-silo-field/>; Kristensen, “Chinese Nuclear Weapons, 2025”, cit.; U.S. Department of Defense, *Military and Security Developments Involving the People’s Republic of China 2024*, cit.

shadow. Planning that assumes escalation control by default is therefore hazardous.¹⁵

For Japan, the China driver is not merely numerical. It is a combination of growing Chinese nuclear capability and intense conventional and grey-zone pressure in the East and South China Seas and concerning Taiwan. In this environment, Tokyo's fear is not only of being attacked directly but also of being caught in a scenario in which U.S. escalation control becomes difficult and alliance 'decoupling' fears re-emerge.¹⁶

3. Japan and the politics of latency: how a threshold posture could emerge

Japan is often described as the archetypal 'threshold' or 'latent' nuclear-capable state. It does not pursue nuclear weapons and remains committed to the NPT, but it possesses many of the technical and industrial prerequisites that could shorten the timeline if a future government decided to cross the line. Japan's latency is therefore political as much as technical. It rests on a dense network of domestic norms, legal constraints, alliance arrangements and international transparency measures that keep the nuclear option in the background.¹⁷

At the level of declared policy, the three non-nuclear principles – non-possession, non-production and non-introduction of nuclear weapons – remain the most visible political restraint. They have been repeatedly reaffirmed and tied to the country's postwar identity and the legacy of Hiroshima and

Nagasaki. However, principles are not the same as immutable law, and their credibility depends on the strategic environment and on public confidence in U.S. guarantees.¹⁸

In recent years, Tokyo and Washington have tried to strengthen this confidence with more explicit extended-deterrence mechanisms. The two governments issued formal Guidelines for Extended Deterrence in December 2024, and in July 2024 their ministers reiterated that the alliance would deepen consultation and coordination on nuclear and non-nuclear deterrence. Such institutionalisation is designed to reduce 'decoupling' fears – concerns that the United States might hesitate to run nuclear risks for Japan – thereby lowering incentives for Japanese nuclearisation. At roughly the same time, Washington and Seoul expanded nuclear consultations under the April 2023 Washington Declaration, reflecting a wider allied trend toward more formalised extended-deterrence governance.¹⁹

Japan's fuel-cycle posture is the core technical factor that repeatedly raises 'threshold' questions. According to Japan's official plutonium management report, as of the end of 2024 Japan controlled roughly 44.4 tons of separated plutonium (about 8.6 tons in Japan and the remainder held abroad in the United Kingdom and France). The Japanese government emphasises that this material is under stringent IAEA safeguards, that it does not possess plutonium without specified purposes, and that it seeks to reduce the stockpile over time. Nevertheless, the existence of a large separated plutonium inventory is strategically salient because in an

15 Reuters, "China's PLA Launches Intercontinental Ballistic Missile into Pacific Ocean," 25 September 2024, accessed 20 December 2025, <https://www.reuters.com/world/china/chinas-pla-launches-intercontinental-ballistic-missile-into-pacific-ocean-2024-09-25/>; Mark F. Cancian, Matthew Cancian and Eric Heginbotham, "Confronting Armageddon: Wargaming Nuclear Deterrence and Its Failures in a U.S.-China Conflict over Taiwan," Center for Strategic and International Studies, 13 December 2024, accessed 24 December 2025, <https://www.csis.org/analysis/confronting-armageddon>; Greg Weaver, "The Role of Nuclear Weapons in a Taiwan Crisis," Atlantic Council, November 2023, accessed 24 December 2025, <https://www.atlanticcouncil.org/wp-content/uploads/2023/11/Weaver-Role-of-Nuclear-Weapons-in-Taiwan-Crisis.pdf>.

16 Albessard, *Japan's Nuclear Latency*, cit.

17 Albessard, *Japan's Nuclear Latency*, cit.; Acton, "Wagging the Plutonium Dog," cit.

18 Ministry of Foreign Affairs of Japan, "Three Non-Nuclear Principles," accessed 20 December 2025, <https://www.mofa.go.jp/policy/un/disarmament/nnp/>.

19 Ministry of Foreign Affairs of Japan, "Government of the United States of America–Government of Japan Guidelines for Extended Deterrence," 27 December 2024, accessed 20 December 2025, https://www.mofa.go.jp/press/release/pressite_000001_00883.html; Japan Ministry of Defence, "Joint Statement of the U.S.-Japan Ministerial Meeting on Extended Deterrence," 28 July 2024, accessed 20 December 2025, <https://www.mod.go.jp/en/article/2024/07/452a1f2362396a9bf9014a3e8692a03394ec381e.html>; The White House, "Washington Declaration," 26 April 2023, accessed 24 December 2025, <https://www.whitehouse.gov/briefing-room/statements-releases/2023/04/26/washington-declaration/>.

extreme political scenario it could be reinterpreted – by supporters or adversaries – as potential latent weapons. Even so, ‘going nuclear’ would not be a turnkey technical act. Weaponisation, delivery integration and – above all – a political and legal rupture with Japan’s post-1945 identity would be substantial hurdles. Any attempt to conduct a nuclear explosive test would also be difficult to conceal given Japan’s geography and the density of global test-monitoring systems.²⁰

The safeguards and transparency regime concerning Japan’s nuclear programme is substantial. Japan accepts comprehensive IAEA safeguards and an Additional Protocol, and the IAEA has drawn a ‘broader conclusion’ for Japan for many years. Tokyo also reports plutonium holdings in line with international guidelines, and it has developed extensive material-accountancy practices at sensitive facilities such as the Rokkasho reprocessing complex. These measures are meant to make Japan’s civilian programme demonstrably peaceful, but they also create a paradox: Japan’s very openness keeps the ‘option value’ of its latency visible to neighbours.²¹

Political signals can therefore matter as much as kilograms. In early 2022, former Prime Minister

Shinzo Abe’s remarks about possible “nuclear sharing” arrangements – making analogies to NATO practices – triggered intense debate inside Japan. While the government reaffirmed that it would adhere to the three non-nuclear principles and the NPT, the episode revealed that under sufficient pressure senior political figures are willing to bring taboo ideas into mainstream conversation.²²

This debate resurfaced in 2025 in more direct form. Reuters reporting on 12 November and 19 December 2025 described senior officials raising the idea of acquiring nuclear weapons and subsequent efforts by the government to reaffirm the ‘no-nukes’ pledge. North Korean state media also responded by warning that Japan’s nuclear ambition should be curbed. Whether or not these reports signal a durable shift in Japanese policy, they illustrate how a cascade can begin as rhetoric and agenda-setting rather than as procurement.²³

The crucial linkage is that North Korean and Chinese behaviour supplies much of the strategic justification for rhetorical and policy shifts in Japan. A Japan that is constantly exposed to DPRK missile salvos and to a PRC that is expanding its nuclear forces at unprecedented speed will find it harder to sustain the claim that the regional nuclear environment

20 Japan Atomic Energy Commission / Cabinet Office, *The Status Report of Plutonium Management in Japan – 2024 (Provisional Translation)* (Tokyo: Office of Atomic Energy Policy, Cabinet Office, 5 August 2025), accessed 20 December 2025, https://www.aec.go.jp/bunya/04/plutonium/20250805_e.pdf; Japan Atomic Industrial Forum, “Japan’s Plutonium Holdings Total 44.4 Tons at End of 2024,” 30 July 2025, accessed 20 December 2025, <https://www.jaif.or.jp/en/news/7607>; Japan Atomic Energy Commission, “The Basic Principles on Japan’s Utilization of Plutonium,” 31 July 2018, accessed 20 December 2025, https://www.aec.go.jp/kettei/kettei/20180731_2.pdf; International Atomic Energy Agency, *The Guidelines for the Management of Plutonium (INFCIRC/549)*, accessed 20 December 2025, <https://www.iaea.org/sites/default/files/infirc549.pdf>; Albessard, Japan’s Nuclear Latency, cit.; Comprehensive Nuclear-Test-Ban Treaty Organization (CTBTO), “The International Monitoring System,” accessed 24 December 2025, <https://www.ctbto.org/our-work/international-monitoring-system>.

21 International Atomic Energy Agency (IAEA), *Safeguards Implementation Report 2024 (SIR 2024)*, June 2025, accessed 20 December 2025, <https://www.iaea.org/sites/default/files/25/06/sir-2024.pdf>; Japan Nuclear Fuel Limited (JNFL), “Safeguards,” accessed 20 December 2025, <https://www.jnfl.co.jp/en/activity/safeguards/>; Japan Atomic Energy Commission / Cabinet Office, *The Status Report of Plutonium Management in Japan – 2024*, cit.

22 Justin McCurry, “Japan’s Ex-PM Shinzo Abe Calls for Debate on Hosting US Nuclear Weapons,” *The Japan Times*, 27 February 2022, accessed 20 December 2025, <https://www.japantimes.co.jp/news/2022/02/27/national/politics-diplomacy/shinzo-abe-japan-nuclear-weapons-taiwan/>; Mari Yamaguchi, “Japan’s Ex-Leader Abe Calls for Debate on Nuclear Sharing,” *The Asahi Shimbun (Asia & Japan Watch)*, 28 February 2022, accessed 20 December 2025, <https://www.asahi.com/ajw/articles/14560003>; Kyodo News, “Japan Ruling Party to Debate Contentious Nuclear Sharing Arrangement,” 2 March 2022, accessed 20 December 2025, <https://english.kyodonews.net/news/2022/03/e2c69f31b0eb-japan-ruling-party-to-debate-contentious-nuclear-sharing-arrangement.html>.

23 Reuters, “Japan PM Wavers on Nuclear Arms Question, Sign of Possible Shift,” 12 November 2025, accessed 20 December 2025, <https://www.reuters.com/world/china/japan-pm-wavers-nuclear-arms-question-sign-possible-shift-2025-11-12/>; Reuters, “Japan Reaffirms No-Nukes Pledge After Senior Official Suggests Acquiring Weapons,” 19 December 2025, accessed 20 December 2025, <https://www.reuters.com/world/china/japan-reaffirms-no-nukes-pledge-after-senior-official-suggests-acquiring-weapons-2025-12-19/>; Reuters, “North Korea’s KCNA: Japan’s Ambition for Nuclear Weapons Should Be Curbed,” 20 December 2025, accessed 20 December 2025, <https://www.reuters.com/world/asia-pacific/north-koreas-kcna-japans-ambition-nuclear-weapons-should-be-curbed-2025-12-20/>.

is 'exceptional' but manageable. When the threat picture is framed as structurally worsening, latency begins to look like prudence rather than provocation.²⁴

Japan's choices are watched closely in Seoul. South Korea is less technologically advanced, and unlike Japan its fuel-cycle capabilities are more constrained (notably in reprocessing and enrichment) and it hosts intense domestic debate about acquiring an independent deterrent or alternatively redeploying U.S. nuclear weapons. Polling in 2025 continued to show high levels of public support for some form of nuclear deterrent enhancement, including a nationally controlled arsenal. Even if Seoul remains bound by alliance commitments and non-proliferation obligations, a visible Japanese drift toward the threshold would be likely to strengthen the political coalition favouring a parallel move.²⁵

The United States responded to these dynamics by attempting to 'lock in' reassurance and consultation, at least until the Biden administration. An April 2023 Washington Declaration created a U.S.-ROK Nuclear Consultative Group (NCG) and committed to deeper planning and information sharing. In September 2024 the allies conducted a first interagency NCG table-top simulation. For Japan, the existence of such mechanisms in the

U.S.-ROK alliance can be read in two ways: as reassuring evidence of U.S. engagement but also as a reminder that allies seek more voice and visibility when doubts about extended deterrence arise. U.S. domestic politics can cut both ways, however: 'America First' voices have periodically suggested that allies should shoulder more of the deterrence burden – including at times by pursuing their own nuclear capabilities – messages that can inadvertently legitimise threshold talk in Tokyo and Seoul.²⁶

In this context, "Japan going nuclear" should not only be understood as the moment of weaponisation. Although Japan is not part of AUKUS Pillar I (the submarine track for Australia), recent debate in Tokyo over whether to consider nuclear propulsion for next-generation submarines has revived the prospect that Japan could someday employ nuclear-powered attack submarines (SSNs) – a move increasingly compared to Australia's AUKUS pathway for acquiring conventionally armed nuclear-powered submarines.²⁷

However, the more plausible cascade markers are subtler: fuel-cycle policies that maximise rapid breakout potential; bureaucratic planning for nuclear contingencies; legal reinterpretations that make possession or hosting of nuclear weapons

24 SIPRI, "World Nuclear Forces," cit.; U.S. Department of Defense, *Military and Security Developments Involving the People's Republic of China 2024*, cit.; Kristensen et al., "North Korean Nuclear Weapons, 2024," <https://doi.org/10.1080/00963402.2024.2365013>.

25 Asan Institute for Policy Studies, "Asan Poll: South Koreans and Their Neighbors 2025," 28 April 2025, accessed 20 December 2025, https://www.asaninst.org/data/file/s3_4_2_eng/f15af67c43af11afd7a990dc4f32fd2b_jbqN3niH_f8111c8c672b91ff679cf1147f75861e6c5eca99.pdf; Asan Institute for Policy Studies, *Worth the Squeeze: A Conditions-Based Analysis of South Korean Public Support for Nuclear Deterrence* (issue brief), accessed 20 December 2025, https://www.asaninst.org/data/file/s1_1_eng/f15af67c43af11afd7a990dc4f32fd2b_ykDOonbu_85ad19703b39f23c28665dbbe95ee65d4abc530b.pdf; Reuters, "South Korea minister says agreed with US to discuss nuclear fuel reprocessing," 28 August 2025, accessed 24 December 2025, <https://www.reuters.com/business/energy/south-korea-minister-says-agreed-with-us-discuss-nuclear-fuel-reprocessing-2025-08-28/>; Arms Control Association, "U.S. Supports South Korean Enrichment, Reprocessing," Arms Control Today, December 2025, accessed 24 December 2025, <https://www.armscontrol.org/act/2025-12/news/us-supports-south-korean-enrichment-reprocessing>.

26 The White House, "Washington Declaration," cit.; U.S. Department of Defense, "Joint Statement on the U.S.-ROK Nuclear Consultative Group Simulation," 6 September 2024, accessed 20 December 2025, <https://www.defense.gov/News/Releases/Release/Article/3898151/joint-statement-on-the-us-rok-nuclear-consultative-group-simulation/>; Watanabe Takeshi, The U.S.-ROK Washington Declaration – Autonomy and Control in Deterrence Strategy, NIDS Commentary No. 261 (23 May 2023), accessed 20 December 2025, <https://www.nids.mod.go.jp/english/publication/commentary/pdf/commentary261e.pdf>; The Washington Post, "Donald Trump isn't president yet, but he's already at war – with the New York Times," 16 November 2016, accessed 24 December 2025, https://www.washingtonpost.com/politics/donald-trump-isnt-president-yet-but-hes-already-at-war-with-the-new-york-times/2016/11/16/8426ab69-ec81-4ae5-b798-cb0c7cc4afe2_story.html; Reuters, "Trump shock spurs Japan to think about the unthinkable: nuclear arms," YouTube video, 19 August 2025, accessed 24 December 2025, <https://www.youtube.com/watch?v=WDYCTmXXfKE>.

27 Kathleen Benoza and Jesse Johnson, "AUKUS eyes defense tech collaboration with Japan, report says," The Japan Times, 3 March 2024, <https://www.japantimes.co.jp/news/2024/03/03/japan/politics/japan-aukus-pillar-2-participation/> (accessed 30 December 2025).

less taboo; and a sustained political narrative that treats latency as an essential hedge. Each of these steps can occur while Tokyo remains formally in the NPT – and each step, in turn, can influence Seoul’s and Beijing’s threat perceptions. A formal withdrawal from the NPT and a low-yield underground nuclear weapon test would be far more visible and politically costly, and would be likely to only come at the end of a long political development.²⁸

polarisation or conflicting priorities – the appeal of national hedging grows. Managing this perception gap is central to preventing a northeast Asian cascade, because cascades begin in politics long before they reach the laboratory.³¹

Conclusion: cascades begin in politics, not in the laboratory

Northeast Asia faces a risk of cascade that is real but not deterministic. North Korea’s established arsenal and coercive signalling exert constant pressure, China’s expanding forces change the strategic baseline and Japan’s technical latency makes it an unusually responsive ‘third node’ in the chain. None of these factors alone forces Japan to seek nuclear weapons, but together they can erode the political and normative barriers that have kept the region’s non-proliferation balance intact.²⁹

The most effective anti-cascade policies are those that raise the cost of crossing the threshold while reducing the perceived need to do so. In practice, this means strengthening alliance consultation and crisis-management procedures (to limit decoupling fears), sustaining credible conventional deterrence and missile defence, maintaining transparency and stockpile-reduction practices concerning separated plutonium and pursuing risk-reduction and arms-control measures where feasible – including communication channels that lower the danger of misperception in a fast-moving crisis.³⁰

The credibility of U.S. extended deterrence is not only a function of military capability; it is also a function of political confidence. When regional actors doubt U.S. willingness to bear costs – whether because of strategic overstretch, domestic

28 Albessard, *Japan’s Nuclear Latency*, cit.; Acton, “Wagging the Plutonium Dog”, cit.; CTBTO, “The International Monitoring System”, cit.; CTBTO, “Detecting Nuclear Tests”, cit.

29 SIPRI, “World Nuclear Forces”, cit.; Kristensen, “North Korean Nuclear Weapons, 2024,” cit.; Kristensen, “Chinese Nuclear Weapons, 2025,” cit.

30 Ministry of Foreign Affairs of Japan, “Guidelines for Extended Deterrence,” 27 December 2024, accessed 20 December 2025, https://www.mofa.go.jp/press/release/pressite_000001_00883.html; Japan Atomic Energy Commission / Cabinet Office, *The Status Report of Plutonium Management in Japan – 2024*, cit.; The White House, “Washington Declaration,” cit.

31 Albessard, *Japan’s Nuclear Latency*, cit.; Reuters, “Japan Reaffirms No-Nukes Pledge After Senior Official Suggests Acquiring Weapons,” cit.

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