



Weathering the storm: A scenario-based approach to strengthening the NPT

Working Group 3 Policy Brief

This paper reflects discussions among members of the ELN's project **Protecting the Non-Proliferation Treaty**. The project seeks to preserve the multilateral nuclear non-proliferation regime and prevent further erosion of the nuclear taboo and the Nuclear Non-proliferation Treaty (NPT). Bringing together an intergenerational, pan-regional Network of experts, it works to identify pathways to success in the eleventh review cycle, taking a holistic approach to the NPT and its three pillars. We are grateful for comments and feedback from several NPT member state officials on drafts of this paper.

For more information on the project please go to www.europeanleadershipnetwork.org/protecting-thenon-proliferation-treaty.

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Introduction

This summer, states parties to the Nuclear Non-proliferation Treaty (NPT) gathered in Vienna for the first meeting of the Preparatory Committee (PrepCom) one year after the 2022 NPT Review Conference (RevCon) ended without consensus on a final outcome document. The unprecedented two-year postponement of the 10th RevCon, brought about by the COVID-19 pandemic, means NPT states parties picked up where they left off without much of a break in an environment that is becoming increasingly difficult to navigate. Using a scenario-based approach, this paper takes stock of current geopolitical dynamics and their implications for the longterm health of the NPT and its review process. At a moment where the risk of use of nuclear weapons remains dangerously elevated, the PrepComs leading up to the next 2026 RevCon present an opportunity for states parties to begin establishing and advancing an agenda to reduce nuclear risks and strengthen the NPT in the long term.

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Great power competition and implications for the NPT

The first PrepCom was held in a challenging international environment. Following two consecutive cycles that failed to produce a consensus outcome, the eleventh review cycle is facing an evolving security landscape, increasingly strained relations between the five nuclear-weapon states (NWS) recognised under the NPT (the P5), the demise of bilateral arms control between the United States and Russia, ongoing modernisation efforts in all NWS, as well as an active war in Europe waged by one of the depositaries of the NPT against a non-nuclear-weapon state (NNWS). Geopolitical tensions are compounded by the return of reckless nuclear brinksmanship, reviving deep-seated fears of nuclear escalation while the Doomsday clock progressively inches closer to midnight.¹

In December 2021, the P5 still expressed their commitment to reducing growing nuclear risks by establishing a dedicated "working group on nuclear doctrines and policies and strategic risk reduction."2 Shortly thereafter, on January 3rd, 2022, the P5 collectively reaffirmed the Reagan-Gorbachev principle that "a nuclear war cannot be won and must never be fought"3, which was celebrated by many in the community as a significant step in the run-up to the 10th NPT RevCon. Yet, only one month later, Russia's full-scale invasion of Ukraine propelled everyone into a bitter reality that will likely continue to feature prominently in this review cycle. From Russia's repeated coercive use of nuclear threats to the safety and security of nuclear facilities and different perspectives on the role and value of nuclear deterrence and its implications for progress on nuclear disarmament, Russia's brutal war in Ukraine has elevated nuclear risks and brought engagement between key states to a standstill.

After Russian President Putin's announcement that "the first nuclear warheads were delivered to the territory of Belarus"⁴, Poland has once again declared interest in joining NATO's nuclear sharing program whereby it would host U.S. nuclear weapons on its territory.⁵ In the Asia-Pacific region, the return of debates about the potential acquisition of nuclear weapons in South Korea earlier this year exemplifies growing concerns about increasing pressure for horizontal proliferation. Concurrently, Finland and Sweden have joined NATO and are now protected by NATO's nuclear umbrella. Countries around the world are visibly starting to draw different lessons and conclusions about the role nuclear weapons have played in the conflict, with some - including U.S. allies in the Euro-Atlantic and Asia-Pacific - reinforcing the belief that nuclear weapons are essential components of a country's security architecture.

Tensions are further compounded by the near-collapse of arms control between the United States and Russia. The recent suspension of the New Strategic Arms Reduction Treaty (New START) by Russian President Putin, as well as the prospect of absent limitations on U.S. and Russian nuclear weapons following the looming expiration of the treaty in 2026, perpetuate continuous backtracking on the NPT's Article VI and its obligation to "pursue negotiations in good faith on effective measures relating to cessation of the nuclear arms race at an early date and to nuclear disarmament." Despite the Kremlin's positive response to a statement by U.S. national security adviser Jake Sullivan in June, expressing the United States' willingness to participate in bilateral arms control discussions with Russia and China "without

preconditions", Russia has repeatedly linked the prospect of arms control negotiations with the United States to Western backing of Ukraine, noting that "arms control cannot be isolated from geopolitical realities." Russia's deputy foreign minister Ryabkov only recently repeated that Russia cannot "discuss arms control issues in the mode of so-called compartmentalisation," which would allow to single out pressing issues of common interest from the entirety of the U.S.-Russian strategic relationship, essentially eliminating any opportunities for progress on risk reduction and arms control in the short-term.

In parallel, attempts to establish a U.S.-China dialogue on managing strategic competition and discussing nuclear policies and postures are still in their preliminary stages. Today, China possesses about 400 operational warheads and is projected to amass approximately 1,500 warheads by 2035 if the current rate of expansion persists, surpassing previous estimates from the U.S. Department of Defense.⁸ In addition, all P5 countries are currently engaged in expanding and modernising their nuclear stockpiles. These developments raise concerns about the prospects for an accelerating and dangerous three-party, if not multilateral, arms race, which is set to be more complex and challenging to manage than the bilateral setting of the Cold War.

Recent months have further seen unsettling developments in the realm of nuclear testing. Underscoring his readiness to break the three-decade-long moratorium, President Putin in February this year warned that Russia would resume nuclear explosive tests if the United States decided to do so.9 The statement was later softened by Kremlin spokesperson Dimitry Peskov, who noted that everyone is currently abiding by the moratorium.¹⁰ Yet, in October, the Russian Duma voted unanimously to withdraw ratification of the Comprehensive Test Ban Treaty (CTBT) in a "tit-for-tat response in [...] relations with the United States" 11, which has signed but not ratified the treaty.12 Whether meant as a political manoeuvre, another signal of nuclear coercion, or a first step toward the resumption of nuclear testing, the de-ratification of the CTBT carries the risk of leading down a slippery slope. While the resumption of testing might not be immediate, revoking ratification moves Russia one step closer to this scenario, which would open the door for other nuclear-armed states to follow suit. At a time of rising modernisation and arms-racing pressures, these developments have the potential to damage a crucial element of the NPT regime.

Amidst the ongoing lack of progress by the NWS in fulfilling their obligation to nuclear disarmament under Article VI of the NPT, such developments are only contributing to growing frustrations among non-nuclear-weapon states (NNWS). While the 2010 Action Plan presents a range of practical measures to advance the NPT's goals across all three pillars, the reluctance of the P5 to set definitive timelines and concrete benchmarks for the implementation of past commitments has undermined accountability. Citing the deterioration of the security environment as a reason for inaction on Article VI, NWS thus face criticism from a majority of NPT states parties who argue that the catastrophic risk inherent in the possession of nuclear weapons can only be reduced to zero through their elimination. Similarly, continued reluctance by the P5 to include even simple language acknowledging the humanitarian consequences of nuclear weapons and persisting antagonism

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vis-a-vis the Treaty on the Prohibition of Nuclear Weapons (TPNW) add to the consternation of many NPT States parties who view the treaty as complementary and supportive to the NPT. The continued failure of the P5 to act on their "special responsibility" only risks deepening divisions between NWS and NNWS and weakening the non-proliferation regime in the long term.

The potential implications of the current status quo for the NPT are profound.

Trust among NPT States parties, in particular between the P5, has been noticeably eroding, fuelling an atmosphere of suspicion that jeopardises both the treaty's review process and its long-term effectiveness. Despite having served as a valuable platform for dialogue within the context of the NPT in the past, the P5 process has considerably slowed since Russia's initiation of a full-scale invasion of Ukraine in February 2022. Currently chaired by Russia, the stagnating dialogue among the five NWS has mainly occurred on the working group and technical expert levels, lacking higherlevel ministerial engagements and pursuing only a modest agenda largely overshadowed by plummeting relations.

This lack of meaningful dialogue and constructive communication channels curtails opportunities for cooperation—as limited as they may be—and diminishes prospects for achieving any—even unilateral-progress on the most contentious Pillar I and II issues of the NPT in the upcoming review cycle.

Finally, attempts to manipulate or coerce outcomes in the past, as well as the practice of holding the review process hostage, undermine the purpose of the review cycle and have deepened divisions between NPT states parties. It does not help that Russia continues to obstruct even the slightest sliver of progress, as evidenced by its recent behaviour in the Working Group on Strengthening the Review Process, the Vienna PrepCom, and other multilateral forums, which raises doubts as to whether Moscow thinks upholding the non-proliferation regime is still in its interest.¹⁴ This puts into question the commitment to and shared understanding of the principles of the NPT, which is urgently needed to advance collective efforts toward nuclear disarmament and non-proliferation. Failure to do so could have devastating consequences for global peace, security, and stability in the years to come.

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Three scenarios

The following section of this paper explores three scenarios addressing the trajectory of great power competition and its implications for the future of the NPT over the next five to ten years, encompassing the two subsequent review cycles. These scenarios are not predictions but non-exhaustive representations of a range of possible futures, each shaped by current trends and signals of change. By examining alternative futures, the aim is to provide a better understanding of the challenges the NPT might face in the long-term if progress is not made in the short-term.

Slow death

The first scenario describes a future in which the current geopolitical status quo persists and hardens. The war in Ukraine has continued for several more years without a lasting armistice or a negotiated solution to the war. The repeated use of nuclear threats by Russia to cover its conventional aggression has amplified perceptions of nuclear risk, further intensified by the everpresent concern about accidental escalation in heated phases of the war, which has remained a focal point of global attention.

The relationships between the United States and both Russia and China have remained confrontational and stuck. While technical expert meetings among the five nuclear-weapon states continue to take place, the P5 fail to make any substantive progress on Article VI - neither on the implementation of past commitments nor on urgently needed nuclear risk reduction measures.

The New START agreement expires in 2026 without a follow-on agreement. While both Russia and the United States confirm they will continue abiding by the treaty's ceilings on delivery vehicles and deployed strategic warheads, other valuable aspects of the treaty - including data and information exchanges and verification provisions - are no longer in force. Nuclear modernisation efforts continue without changes to U.S. or Russian nuclear doctrine as the assumption that neither country will exceed the force levels currently dictated by New START continues to hold true. However, with China's gradual but steady expansion of its arsenal, the United States is slowly but surely finding itself under domestic pressure that questions the feasibility of continuing to adhere to the limitations of the expired treaty.

Given NWS' perceived backtracking on the NPT's Article VI commitments, the disappointment and frustration that led some diplomats and activists to pursue the adoption and ratification of the TPNW, fuels voices who call for disengagement with the NPT review process. A growing group of states are unwilling to make concessions, only to demonstrate support for the NPT without the prospects of concrete progress on the treaty's disarmament and non-proliferation commitments. The 2026 RevCon once again fails to produce an outcome document or any positive signs of improvement on Article VI, resulting in a strong sense of fatigue felt within delegations and the NPT community more broadly. Consequently, the 12th review cycle starts with virtually no expectations for success, while the trust in the effectiveness and functioning of the NPT diminishes significantly with several countries deciding to stop participating in the Preparatory Committees and Review Conferences.

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This scenario does not envision the NPT "dying" overnight. The treaty has largely fulfilled its primary objective of halting the spread of nuclear weapons at the time of its establishment in 1970, and it stands out as one of the most widely adopted United Nations (UN) treaties. Over the years, various issues and disagreements between NWS and NNWS have prevented the achievement of a consensus outcome at previous review conferences such as in 1980, 1990, and 2005 - without relegating the NPT to the sidelines. In fact, the NPT has shown remarkable resilience, surpassing the expectations of many long-standing observers of the NPT review process.

The treaty was constructed on the foundation of a "grand bargain" based on, on the one hand, NWS' commitment to "general and complete disarmament" and, on the other hand, the adherence of NNWS to nuclear non-proliferation obligations to maintain the balance deemed crucial for protecting the peaceful uses of nuclear energy. The majority of States parties continue to actively work toward implementing the Treaty's objectives across all pillars and comply with its monitoring and verification procedures. Pillar III, especially, registered constructive discussions and progress at last year's RevCon¹⁷. However, the stark asymmetry between NWS and NNWS regarding compliance with the Treaty's obligations might eventually start disturbing the equilibrium, fuelling grievances based on growing perceptions of injustice and an unfair process. Not only do existing "enforcement, inspection, and compliance rules and mechanisms"18 focus disproportionately on the nonproliferation pillar-therefore falling much more heavily on the NNWS-the NWS are not even fulfilling their end of the bargain, which amid a deteriorating security environment, persisting nuclear threats, and growing nuclear risks will start weighing on the credibility of the regime. Instead of serving as a vehicle for transformation, the NPT has morphed into a regime for managing the nuclear status quo in the interests of today's nuclear powers."19

As states parties struggle to restore the balance of the grand bargain, they are failing their legal obligations and slowly but surely are chipping away at the foundation of the NPT, decreasing its relevance and ability to effect change in the long term.

Fatal blow

The second scenario is triggered by the breakdown of arms control between the United States and Russia with the expiration of New START in 2026 without negotiations of a follow-up agreement or de facto maintenance of the treaty's limits, as outlined in Scenario 1. This creates an unconstrained environment not faced since the adoption of the Strategic Arms Limitation Treaty (SALT I) in 1972. What ensues is an accelerating and increasingly dangerous multilateral arms race.

Driven by peaking mistrust amid fewer verifiable information and data points, threat perceptions between the United States, Russia, and China resort to worst-case thinking about each other's intentions. Following Russia's efforts to rapidly upload its delivery systems, the United States mirrors these developments, utilising its capacity to add warheads to its deployed strategic forces across the triad to the full extent. Combined, the United States' and Russia's deployed arsenals are on a trajectory to double in size, reversing decades of arms control efforts.

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Based on China's continuous expansion of its nuclear arsenal, the United States further concludes that "the U.S. strategic posture [is] insufficient to achieve the objectives of U.S. defence strategy in the future." Replacing the U.S.'s long-standing mantra of being second to none and "essentially equivalent" to Russia, the United States announces a significant shift in its nuclear doctrine and posture, driven by the conviction of having to be "equal to both" aimed at countering both Russian and Chinese advances combined.

Amid these developments, concerns grow regarding the potential resumption of nuclear testing. Falsely citing no-fissionable yield experiments conducted by the US as "proof" for the alleged detection of a nuclear test by the United States, Russia creates a narrative to prepare the ground for the resumption of nuclear explosive testing. ²² Amid escalating tensions between Russia and NATO over the war in Ukraine, President Putin ordered Russia's first explosive nuclear test since 1990. The overwhelming majority of countries respond with outrage, perceiving it as a clear step up the nuclear escalation ladder. ²³

With the prohibition on nuclear testing woven into the fabric of the NPT, the implications of these developments for the health of the treaty are immense. And to only was the issue of negotiating a permanent ban on nuclear explosive testing central to NPT discourse since the 1980s, but the commitment by the P5 to conclude negotiations of the Comprehensive Test Ban Treaty (CTBT) was also an integral part of the agreement that secured the indefinite extension of the NPT in 1995. The entry into force of the CTBT subsequently became one of the 13 Steps agreed upon in 2000, while the broader issue of upholding the moratoria on nuclear testing spans several actions in the 2010 64-point Action Plan. The resumption of nuclear testing by any NWS thus threatens to serve a fatal blow to one of the NPT's central promises, from which recovery seems uncertain.

All is not lost

In the spirit of "it gets worse before it gets better", Scenario 3 illustrates a potential future where the recognition of shared interests and the realisation of the dangers associated with an uncontrolled arms race and intensifying proliferation pressures compels the United States and China to prioritise arms control negotiations and work toward the establishment of more stable and predictable strategic relationships.

Amid evolving dynamics in the Asia-Pacific region, including repeated ballistic missile launches from North Korea and China's increasingly assertive behaviour on the international stage, South Korean policymakers advocate for reopening the debate to increase the role of nuclear weapons as a means to ensure security in East Asia and the broader Indo-Pacific region. South Korea is gradually adopting a hedging strategy to bolster its security and maintain flexibility in response to the changing regional landscape, with an emphasis on increasing nuclear latency and enhancing conventional defence capabilities. ²⁶ Deliberations by the U.S. administration to redeploy tactical nuclear weapons in South Korea to stop the South Koreans from pursuing a nuclear weapons program of their own create serious tensions with China, raising concerns about the prospect of inadvertent escalation in the region. ²⁷

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These concerns materialise as tensions between the United States and China in the South China Sea reach a high due to a series of dangerous intercepts of U.S. aircraft operating in the South China Sea, bringing an already fragile relationship to the brink. One day, a Chinese aircraft causes an accidental collision, killing a U.S. Air Force pilot.²⁸ With minimal communication between the two countries, a dangerous tit-for-tat follows, in which the United States and China barely escape nuclear escalation.²⁹ In hindsight, it appears that Al-reliant decision-making support systems, which both the United States and China introduced as part of modernisation efforts, significantly contributed to the escalation spiral. Following this period of intense arms racing, the close call creates a short opening for high-level engagement between the two countries, which leads to a political commitment to establish a bilateral dialogue for immediate risk reduction while keeping the option of a more comprehensive and integrated dialogue to address security in the region open. While such dialogue would be well received by NPT states parties and likely interpreted as a step toward progress, what does it mean for the effectiveness of the NPT if the incentive to do so originated in a close call?

What is the future of the NPT?

The NPT is not without its shortcomings, but in times of disintegrating treaty regimes, it plays a vital role in creating space for dialogue, upholding the non-proliferation norm, and holding - at least in theory - NWS accountable for their disarmament obligations. While frustrations about the lack of progress on Article VI are high, the benefits the treaty provides to NNWS (e.g., ensuring access to peaceful uses of nuclear technology) continue to outweigh the costs of leaving (e.g., international isolation and sanctions). What happens, however, if the trade-offs that NNWS accept to reap those benefits stop paying off, if states parties fail in rebalancing the NPT's "grand bargain"? The scenarios provide a snapshot of likely futures in which the status quo might well become untenable—with an uncertain outcome for the NPT. They highlight issues that states parties should be paying careful attention to, including:

- Increasing mistrust and misperceptions among NWS that fuel harmful action-reaction dynamics.
- Lack of compartmentalising arms control, risk reduction, and strategic stability from broader political disagreements and polarisation.
- Regressing commitment to the CTBT and growing threats to the norm against nuclear testing.
- Reemergence of horizontal proliferation pressures.
- Intersection of emerging technologies with nuclear risks.
- · Absence of crisis communication channels.

NPT states parties should focus their efforts on devising **strategies that "stop the bleeding"** in any of these areas.

Upholding the moratorium and norm against **nuclear testing** is both critical and urgent given the immediate and grave impact a resumption of nuclear testing by an NPT member state would have on the treaty and the international security environment more broadly. To increase political pressure and, at the same time, rebuild confidence, actions should include:

- Reaffirmation by all States parties that the goal of prohibiting all nuclear tests is firmly embedded in the NPT through its Preamble, which includes the objective "to achieve the discontinuance of all test explosions of nuclear weapons for all time".
- Commitment by NWS to observe their moratoria on nuclear explosive testing and refrain from actions that would defeat the object and purpose of the CTBT.
- Introduction of unilateral or joint confidence-building measures, such as the provision of notifications and/or exchanges of information regarding certain tests.

At the same time, it will be imperative to manage today's security dilemmas and minimise broader nuclear risks until a window for broader cooperation on arms control and strategic stability opens again in the future. Much has been written on **nuclear risk**

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reduction measures. ³⁰ The problem is not a lack of ideas but a lack of political will, which reduces possibilities for cooperative (bilateral or multilateral) measures. This should not, however, distract from the availability of **unilateral options** as well as the inherent **value of sustained dialogue and open communications channels** to at least maintain the option of eventually restoring trust and confidence (e.g., continued P5 engagement - even if only at an expert level).

Responding to long-standing concerns by NNWS that "risk reduction" as understood by NWS only addresses "strategic risks" as opposed to the catastrophic risks of nuclear use inherent in the possession of these weapons, NPT states parties should identify risk reduction measures that would simultaneously advance the NPT's Article VI - many of which are recorded in past commitments. This could include evaluating the impact of emerging and disruptive technologies, for example, by working toward defining "rules of the road" in the nuclear, cyber, AI, and space domains, to reduce the risk of nuclear use.

To a certain extent, addressing the growing frustrations within the NPT community should also involve enhancing accountability and transparency, aiming to restore the sense of fairness that NNWS have been lamenting. In line with discussions in the Working Group for Strengthening the Review Cycle, NPT states parties should work towards establishing a structured, interactive dialogue between NWS and NNWS on the contents of national progress reports, which would require NWS to report on the efforts undertaken to overcome the challenges hindering progress on Article VI.

However, several open questions remain:

- Can the benefits that pillar III provides counterbalance and outweigh frustrations regarding the lack of progress in pillars I and II?
- If NPT states parties fail to restore the treaty's "grand bargain", is it realistic and desirable to explore alternative forums for nuclear risk reduction and disarmament? Can the NPT transform into a "peaceful uses" regime?
- Short of withdrawal, how detrimental are growing fatigue, frustration, and gradual disengagement for the functioning of the treaty in the long term? Does the NPT risk becoming a mere shell, and how would this impact international security?
- How can NPT states parties create and promote positive incentives for bilateral and multilateral dialogue, mitigating action-reaction dynamics that could lead to the brink of nuclear conflict?
- Can we redefine "success" in a way that allows for more constructive approaches within the review cycle?

Grappling with and studying these questions is necessary to weather the storm. Achieving meaningful progress within the NPT framework will require blending short-term actions with a long-term vision that confronts the treaty's fundamental challenges.

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