THE NUCLEAR ORDER AT THE BRINK

Can the NPT Survive the New Geopolitical Upheaval?

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For more than half a century, the Nuclear Non-Proliferation Treaty has functioned as one of the few enduring guardrails against a catastrophic global descent into nuclear anarchy. Signed in 1968 and entering into force two years later, the treaty emerged from the terrifying lessons of the Cold War, when humanity stood repeatedly at the brink of self-destruction. Through wars, ideological rivalries, regional crises and technological revolutions, the NPT has survived as an imperfect yet indispensable compact: nuclear-armed states would move gradually towards disarmament, non-nuclear states would refrain from acquiring the bomb, and all parties would retain access to peaceful nuclear energy.

Today, however, that fragile bargain is under perhaps the gravest strain in its history.

As diplomats gather in New York for the 2026 Review Conference, the atmosphere surrounding the treaty is one not of cautious optimism but of mounting apprehension. The global nuclear order is fraying simultaneously on several fronts. Major powers are modernising and expanding their arsenals. Arms control agreements painstakingly negotiated over decades have collapsed. Regional wars increasingly carry nuclear overtones. Strategic mistrust between Washington, Moscow and Beijing has deepened into open hostility. Meanwhile, countries once content under the protection of security alliances are beginning to question whether those guarantees can still be trusted.

The conference itself was never expected to produce dramatic breakthroughs. Historically, consensus has been rare. Out of ten previous review conferences, only four managed to adopt a final consensus document. Yet the stakes this time appear considerably higher because the crisis confronting the NPT is not merely procedural or diplomatic. It is existential.

At the centre of the gathering lies a troubling reality: the world is entering a new nuclear age without the institutional safeguards, strategic discipline or political leadership that once prevented rivalry from spiralling into catastrophe.

Much of the debate in New York is already being overshadowed by the explosive fallout from the Israeli and American strikes on Iranian nuclear facilities in 2025 and 2026. Washington and Tel Aviv insist the operations were necessary to stop Tehran from crossing the nuclear threshold. According to Western assessments, Iran had accumulated enough highly enriched uranium for multiple weapons and was edging dangerously close to weaponisation capability. The strikes, which targeted dozens of nuclear sites and eliminated several Iranian nuclear scientists, were presented as acts of pre-emptive defence designed to preserve regional and global stability.

Supporters of the military action argue that the operations delivered a powerful message to aspiring proliferators: the international community, led by the United States, is prepared to use force to prevent the emergence of new nuclear-armed states. From this perspective, the strikes may have delayed Iran's breakout capability by several years and potentially averted a nuclear arms race across the Middle East.

Yet that interpretation is far from universally accepted.

For many countries in the Non-Aligned Movement, the strikes represented a dangerous precedent — one that undermines international law while exposing the selective morality of the global nuclear order. The anger is especially pronounced because Israel itself remains outside the NPT framework while maintaining an undeclared nuclear arsenal. To much of the developing world, the message appears deeply contradictory: some nations may possess nuclear weapons indefinitely, while others are punished even for approaching the threshold.

This resentment is likely to dominate proceedings throughout the Review Conference. Iran's prominent role within the Non-Aligned bloc has already ensured that debates over safeguards, compliance and enforcement will become intensely polarised. Any attempt by Western powers to push for stronger non-proliferation commitments may therefore encounter fierce resistance from countries that view the existing system as fundamentally unequal.

The diplomatic deadlock surrounding Iran also reflects a broader transformation in the global balance of power. The post-Cold War period, despite its many failures, at least maintained a rough architecture of strategic restraint between major powers. That framework has now largely disintegrated.

The expiration of New START earlier this year symbolises more than the collapse of a treaty. It marks the erosion of an entire philosophy of arms control that once recognised the mutual danger of unconstrained nuclear competition. For decades, Washington and Moscow negotiated limitations not because they trusted each other, but because they understood that strategic stability served both sides.

That logic is now fading rapidly.

Russia's invasion of Ukraine shattered what remained of Europe's post-Cold War security order. Moscow's repeated nuclear threats, coupled with its suspension of treaty verification mechanisms, accelerated the breakdown of arms control. Simultaneously, China has embarked on the fastest nuclear expansion in its modern history. From an estimated stockpile of roughly 200 warheads a decade ago, Beijing is projected to possess nearly 1,000 by the end of this decade.

The United States, confronted with two major nuclear competitors for the first time in its history, has responded by reassessing its own strategic posture. Yet the danger lies not merely in expanding arsenals, but in the disappearance of predictable rules governing competition.

During the Cold War, communication channels, inspection regimes and negotiated limits acted as stabilising mechanisms even at moments of severe confrontation. Today, such guardrails are weakening precisely when geopolitical tensions are intensifying. Strategic ambiguity, cyber vulnerabilities, artificial intelligence-driven military systems and hypersonic weapons are further compressing decision-making time during crises, increasing the risk of catastrophic miscalculation.

What makes the present moment especially alarming is that all three major powers increasingly view nuclear weapons not as instruments of deterrence alone, but as tools of geopolitical leverage.

Russia uses nuclear rhetoric to intimidate Europe and discourage deeper Western involvement in Ukraine. China views nuclear expansion as essential to securing great-power parity with the United States. Washington, meanwhile, sees strategic superiority as necessary to deter both adversaries simultaneously. In such an environment, restraint becomes politically difficult and diplomatically unrewarding.

Compounding the problem is the growing anxiety among American allies regarding the credibility of the U.S. nuclear umbrella.

For decades, countries such as Germany, Japan and South Korea accepted non-nuclear status partly because they trusted Washington's security guarantees. That trust now appears less certain. The rise of "America First" politics has raised uncomfortable questions in allied capitals about whether the United States would truly risk nuclear confrontation to defend distant partners.

In Europe, the debate has already moved beyond quiet strategic circles. France is increasingly discussed as the potential anchor of a broader European nuclear deterrent. Poland has openly flirted with the possibility of acquiring nuclear capabilities. In Asia, North Korea's advancing arsenal has fuelled growing calls within South Korea and Japan for independent nuclear options.

This represents perhaps the most dangerous long-term threat to the NPT. The treaty's survival depends not merely on legal obligations but on political confidence. Once allies begin doubting extended deterrence guarantees, domestic pressure for indigenous nuclear capabilities inevitably grows.

History demonstrates that proliferation rarely occurs in isolation. One state's nuclear ambitions quickly trigger anxieties among its neighbours. A nuclear-armed Iran could push Saudi Arabia, Turkey and Egypt towards similar paths. A nuclear South Korea might compel Japan to reconsider its long-standing anti-nuclear posture. The collapse of one regional balance could rapidly destabilise others.

The war in Ukraine has intensified these fears dramatically.

When Ukraine surrendered the nuclear arsenal it inherited after the collapse of the Soviet Union under the 1994 Budapest Memorandum, it did so in exchange for security assurances from major powers, including Russia, the United States and the United Kingdom. Three decades later, Ukraine finds itself invaded by one guarantor while receiving limited protection from the others.

The implications have not gone unnoticed elsewhere.

For countries confronting hostile neighbours or uncertain alliances, Ukraine's experience reinforces a brutal lesson: nuclear weapons may ultimately provide the only reliable guarantee of sovereignty. This perception, whether accurate or not, directly undermines the central logic of the non-proliferation regime.

Russia's occupation of the Zaporizhzhia Nuclear Power Plant has further deepened international alarm. The repeated shelling around the facility has exposed the terrifying vulnerability of civilian nuclear infrastructure during wartime. The mere possibility of a catastrophic accident at Europe's largest nuclear power plant has highlighted how modern conflicts increasingly blur the line between conventional warfare and nuclear risk.

Yet despite the enormity of these dangers, the international response remains fragmented and reactive.

The United States continues to play a central role in shaping the nuclear order, but its policies often appear contradictory. On one hand, Washington insists on halting Iran's enrichment programme and preventing further proliferation. On the other, it has reportedly relaxed restrictions on enrichment and reprocessing technologies for close allies such as South Korea and potentially Saudi Arabia.

Such exceptions may appear strategically convenient in the short term, but they carry profound long-term risks. Enrichment and reprocessing technologies are inherently dual-use. Civilian nuclear programmes can quickly provide the technological foundation for military capabilities. Once these technologies spread, reversing proliferation becomes exponentially more difficult.

The argument that trusted allies can safely manage such capabilities ignores a basic truth of international politics: governments change, regional dynamics shift and security calculations evolve. Today's ally may become tomorrow's strategic uncertainty.

Moreover, selective enforcement damages the credibility of the entire non-proliferation system. Countries outside the Western alliance structure increasingly view nuclear rules as instruments of geopolitical convenience rather than universal principles. This perception weakens international cooperation precisely when collective discipline is most needed.

The challenge facing the NPT therefore extends beyond any single crisis. The treaty is confronting a profound crisis of legitimacy.

Non-nuclear states increasingly accuse nuclear powers of failing to honour disarmament commitments while expecting permanent compliance from everyone else. Nuclear-armed states, meanwhile, argue that deteriorating security conditions make meaningful disarmament unrealistic. The result is a widening trust deficit that paralyses diplomacy.

Pro-disarmament movements have attempted to address this frustration through initiatives such as the Treaty on the Prohibition of Nuclear Weapons. However, none of the major nuclear powers support the treaty, limiting its practical impact. While morally significant, such efforts cannot substitute for engagement between the states that actually possess nuclear arsenals.

The uncomfortable reality is that the world today resembles the early nuclear age more than the relatively stable late Cold War period. Rivalries are intensifying. Communication is deteriorating. Arms control is weakening. Technological competition is accelerating. And political leadership capable of imposing restraint appears increasingly absent.

The symbolism of the 1946 Bikini Atoll tests still lingers hauntingly over the nuclear era. Those explosions marked not merely a technological breakthrough but the beginning of humanity's permanent confrontation with its own destructive potential. For decades, the NPT helped prevent that danger from multiplying uncontrollably. It created norms, expectations and diplomatic mechanisms that restrained proliferation even amid fierce geopolitical competition.

But treaties survive only when major powers continue believing that cooperation serves their interests.

At present, that belief appears dangerously fragile.

The United States still possesses unmatched diplomatic influence and military capacity, yet leadership requires more than strength. It requires consistency, credibility and strategic clarity. Washington cannot simultaneously champion non-proliferation while selectively weakening its own standards. Nor can it rely solely on coercion while neglecting the diplomatic architecture necessary for long-term stability.

Equally, Russia and China cannot demand respect for strategic balance while pursuing aggressive policies that destabilise neighbouring regions and fuel global insecurity.

The tragedy is that every major power continues to recognise, at least privately, the catastrophic consequences of nuclear conflict. Yet each increasingly behaves as though short-term geopolitical advantage outweighs collective survival.

That contradiction defines the crisis confronting the 2026 Review Conference.

Even if diplomats in New York fail to produce a consensus document, the deeper issue will remain unresolved. The real test is not whether negotiators can agree on carefully worded statements, but whether the world's leading powers can rediscover the logic of restraint before rivalry spirals beyond control.

The NPT was never designed to eliminate conflict. It was designed to prevent civilisation-ending catastrophe amid conflict. For over fifty years, despite wars, coups, invasions and crises, it largely succeeded.

Now, however, the foundations sustaining that success are weakening simultaneously.

Iran's nuclear ambitions, Russia's aggression, China's expansion, allied insecurity, technological diffusion and collapsing arms control structures are not isolated problems. Together, they represent a systemic challenge to the very idea of nuclear order.

The danger is not necessarily that nuclear war becomes inevitable tomorrow. The greater danger is slower and more insidious: a world gradually normalising proliferation, accepting perpetual nuclear competition and abandoning the belief that restraint remains possible.

Once that psychological barrier collapses, rebuilding it may prove impossible.

The NPT still offers humanity a framework for avoiding that future. But treaties alone cannot preserve peace. They require political will, strategic patience and credible leadership from those with the greatest power and responsibility.

Without such renewal, the world may discover too late that the erosion of the nuclear order does not occur in one dramatic moment. It happens incrementally — through distrust, exceptions, rivalries and complacency — until the structures preventing catastrophe quietly cease to function.

And when that happens, the consequences will extend far beyond diplomatic failure in New York.