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Strategic risks in the Asia-Pacific: Examining Australian, British, Japanese, and South Korean perspectives

Project Report

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The European Leadership Network (ELN) is an independent, non-partisan, pan-European NGO with a network of nearly 200 past, present, and future European leaders working to provide practical real-world solutions to political and security challenges.

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Executive summary

The deteriorating global security environment, including in the Asia-Pacific region, risks undermining the existing nuclear order. Regional policy-making is shaped by heightened threat perceptions due to factors such as North Korea's aggressive nuclear and military activities, China's assertiveness in the region, and a worsening strategic competition between the United States and China.

In an increasingly volatile regional environment, the governments of Australia, Japan, and South Korea are making strategic choices to address the risks that these developments pose to their national security. Meanwhile, the UK is working to strengthen its engagement in the Asia-Pacific. Understanding how actors in the Asia-Pacific perceive and react to evolving strategic risks is important to promote regional and global stability and reduce negative impact on the non-proliferation regime.

In the framework of a joint APLN-ELN project funded by the UK Foreign, Commonwealth and Development Office (FCDO), experts and officials from Australia, Japan, South Korea, and the UK identified strategic risks emanating from a shared set of concerns, notably North Korea's nuclear posture and China's assertive behaviour, as well as twin concerns over a potential US retreat from the region and the risk of entrapment in a conflict of somebody else's choosing. Yet, there was disagreement on the relative immediacy and significance of these threats as well as on their impact on the global nuclear order.

All four states view North Korea's aggressive nuclear posture as a "strategic" risk, though they disagree on its degree of immediacy. South Korea perceives potential North Korean military aggression as the most direct threat, as does Japan, which would be a likely target for a North Korean nuclear strike in such a conflict scenario. The UK is, for geographical reasons, less concerned about any direct threat from North Korea than about the impact of Pyongyang's policies on nuclear risks in the region more broadly. Australia is assured that the US presence in the region suffices to manage the threat posed by North Korea's nuclear arsenal, which it ranks below concerns over China's military expansion and assertiveness in the region.

In contrast to the perception of North Korea as a relatively narrow nuclear threat, the findings of this project suggest that Australia, Japan, South Korea, and the UK see much broader "strategic" risks emerging from China's assertive foreign policy, which is backed up by its economic clout and expanding nuclear arsenal. Australia and Japan are most concerned about the direct threat posed to their sovereignty by Chinese behaviour, particularly around Taiwan, and the risk of being dragged into an armed conflict with China. By contrast, South Korea and the UK are more apprehensive of the wider disruptive effects of a confrontation involving China on regional stability, based on economic as well as security and proliferation concerns.

In light of the perceived strategic risks stemming from China and North Korea, the three Asia-Pacific states seek to balance their desire for US assurance against their fear of entrapment. Mirroring these sentiments, most British participants considered the US presence in the region a stabilising

Australia, Japan, South Korea, and the UK should coordinate their efforts in groups such as the G20, the G7, and the P5 to call for high-level US and Chinese commitments to an official Track 1 dialogue.

factor, but some also warned against forcing regional states to choose sides.

While the war in Ukraine is perceived as a direct strategic risk by the UK, it serves as an additional prism through which Australia, Japan, and South Korea assess their security environment. However, they disagree on its implications for the region. Some are concerned that North Korea and China might seek to replicate the way in which Russia has used nuclear threats to shield its war of aggression against Ukraine, while others believe that the war has demonstrated the costs of aggression. Consequently, there is also no consensus on whether the Russian invasion of Ukraine has made a Chinese invasion of Taiwan more or less likely.

British, Japanese, and Australian participants were apprehensive of both regional proliferation and broader stresses on the non-proliferation regime. South Korean analysts appeared comparatively less concerned. Throughout the project, many raised concerns over the viability of the Non-Proliferation Treaty (NPT). The Chinese nuclear modernisation was perceived as undermining the NPT, but potential South Korean proliferation and a subsequent domino effect on Japan were also mentioned as a potential risk. The Australia-UK-US (AUKUS) security pact was not viewed as a proliferation concern by any of the four countries, but some analysts acknowledged that it had become a divisive issue that could undermine international unity on non-proliferation issues.

Policy recommendations

- Australia, Japan, South Korea, and the UK should coordinate their efforts in groups such as the G20, the G7, and the P5 to call for high-level US and Chinese commitments to an official Track 1 dialogue. Australia, Japan, South Korea, and the UK should also encourage engagement with China on the value of crisis communication channels and seek the resumption of military-to-military crisis communication channels between the United States and China or set up their own bilateral or multilateral channels with China.
- Within the NPT framework, Australia, Japan, South Korea, and the UK should encourage the launch of a new working group (or groups) as part of the current review cycle to develop targeted risk reduction measures, including through discussions on risk escalation scenarios and by exploring synergies between existing risk reduction initiatives.
- The UK, supported by Australia, Japan, and South Korea, should engage China on disarmament verification by sharing their experience from participating in verification initiatives and by facilitating the development of cooperative disarmament verification initiatives for the region.
- To address South Korea's primary security concern – the risk of direct aggression from North Korea – the UK and Australia should provide additional support to Seoul on the basis of a clearly articulated condition that it does not take any concrete steps towards acquiring its own nuclear weapons. Such aid could take the form of continued low-key military

cooperation with South Korea. The UK, in particular, could also take a greater role in working with South Korea on technological developments, and intelligence and cyber-security issues.

- Australia, Japan, and the UK should use existing diplomatic channels to communicate the economic, political, and security implications of nuclear armament to South Korea. In particular, they should make clear that any move towards nuclear weapons acquisition or development will be met with tough sanctions, especially against the South Korean nuclear industry.
- The South Korean and Japanese administrations should build on the current positive momentum to solidify a bilateral framework that includes regular exchanges at both senior and working levels.
- As Japan shares South Korea's concern over North Korean aggression, while also being apprehensive of South Korean calls for nuclear armament, both countries should consider developing exchanges on potential scenarios and responses to a North Korean attack. Eventually this could enable Japan to agree to provide some form of aid to South Korea in the case of North Korean aggression – on the strict condition that Seoul does not take any steps towards nuclear armament.

Introduction

The deteriorating global security environment, including in the Asia-Pacific region, risks undermining the existing nuclear order. Regional policy-making is shaped by heightened threat perceptions due to factors such as North Korea's aggressive nuclear and military activities, China's assertiveness in the region, and a worsening strategic competition between the United States and China.

This paper summarises and analyses the findings of a joint research project conducted by the European Leadership Network (ELN) and the Asia-Pacific Leadership Network (APLN) to identify changing strategic risk perceptions in the region, to develop a common understanding of the challenges to the Treaty on the Non-Proliferation of Nuclear Weapons (NPT) as well as the broader non-proliferation regime, and to strengthen international cooperation on non-proliferation.¹

Implemented between September 2022 and March 2023, the project assessed the perspectives of three regional countries (Australia, Japan, and South Korea) and one extra-regional stakeholder (the UK). To generate a baseline understanding of each national perspective, the ELN and APLN first conducted interviews with experts and officials from each country and commissioned three scoping papers by analysts from Australia, Japan, and South Korea respectively. Subsequently, several Track 1.5 and Track 2 dialogues convened participants from all four countries to enhance mutual awareness of their respective strategic risk perceptions; to understand how these perceptions influence domestic decision-making and regional proliferation risks; and finally, to develop proposals to reduce risks. The discussions were held under the Chatham House Rule, in both virtual and in-person formats.

The following sections explore the present geopolitical outlook of the Australian, Japanese, South Korean, and UK governments, and offer an examination of their perceptions of strategic risks. This section includes an analysis of each country's responses to threats posed by North Korea and China as well as of the impact of alliance politics and Russia's war with Ukraine on regional dynamics. The paper then evaluates how these responses affect the nuclear non-proliferation regime. Finally, it proposes practical recommendations, focusing on actions that the four countries can take collectively or individually to enhance regional stability, reduce nuclear risks, and strengthen the NPT.

Geopolitical context and regional strategies: State of play

In an increasingly unstable regional environment, the relatively new governments of Australia (Albanese government, since May 2022), Japan (Kishida government, since October 2021), and South Korea (Yoon government, since May 2022) are making strategic choices to address security challenges faced by their respective countries.

Australia released its Defence Strategic Review in April 2023, calling it “the most ambitious review of Defence’s posture and structure since the Second World War”². Shortly before that, the 18-month review of the Australia-UK-US (AUKUS) trilateral security agreement was announced by the leaders of the three countries. The AUKUS deal involves a technology-sharing agreement, including the acquisition of up to five US Virginia-class submarines in the early 2030s; nuclear-powered submarines that incorporate British design and US technology by the early 2040s; a rotational presence of US and British submarines and port visits; collaboration on advanced capabilities and technologies such as autonomous underwater vehicles, quantum technologies, artificial intelligence and autonomy, as well as advanced cyber, hypersonic and counter-hypersonic capabilities, among other arrangements.³ In addition, Australia will purchase 220 Tomahawk cruise missiles from the United States.⁴

The **Japanese** government unveiled its new National Security Strategy, National Defense Program Outline, and Defense Buildup Plan in December 2022.⁵ The documents announce a significant expansion of military capabilities and an increase in defence expenditure from 1% of Japan’s GDP to 2% over the next five years. This indicates a shift from a minimalist defensive posture to enhanced deterrence and a new focus on developing the means to fight in any potential conflict. Japan views North Korea as the most significant short-term threat, and China, including its development of dual-capable missiles, as the most severe mid- to long-term concern.

At the end of 2022, **South Korea** published the country’s first Indo-Pacific strategy, which addressed the North Korean nuclear threat and articulated a desire to pursue “a sounder and more mature relationship” with China “based on mutual respect and reciprocity”⁶. There is general support for this policy among South Korean analysts and officials, as it expands and clarifies Seoul’s regional role, aligning it more closely with Japanese and US priorities in the region. This policy was further solidified by the Yoon administration’s National Security Strategy, which was released in June 2023.⁷

The strategy has, however, been overshadowed by President Yoon’s recent remarks that South Korea would seek forward-deployed US nuclear weapons and, failing that, could consider obtaining its own nuclear deterrent should the North Korean threat increase.⁸ Public opinion polls in South Korea have consistently shown majority support for nuclear weapons as a means of ensuring national defence, with annual surveys recording a steady increase in public support for a domestic nuclear weapons programme from 56% in 2010 to 66% in 2013.⁹ A poll conducted in December 2021 confirmed this long-standing preference, with 71% of respondents supporting the development of a South Korean nuclear weapons programme, despite awareness of the costs of proliferation.¹⁰ Although South Korea currently does not appear to have any

The fact that South Korean analysts and officials are privately discussing the practical aspects of a nuclear breakout in itself is significant as it marks a distinct shift from a tacit taboo.

concrete plans to proliferate, project participants cautioned that this could change if the regional security situation significantly deteriorated. The fact that South Korean analysts and officials are privately discussing the practical aspects of a nuclear breakout in itself is significant as it marks a distinct shift from a tacit taboo.

The **UK** released its Integrated Review Refresh¹¹ in March 2023, with the aim of “consolidating the strategic shift [...] achieved with the Indo-Pacific tilt”¹², a strategy intended to increase the profile of the UK’s involvement in the region. As part of this strategic shift, the UK has agreed a deal with Japan and Italy to develop a new fighter jet and has moved forward with the AUKUS deal with Australia and the United States. It also intends to start talks on a new free trade agreement with South Korea and has applied to join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) trade grouping.¹³

Strategic risk perceptions and responses

Interviews and roundtable discussions conducted throughout this project suggest that regional states adopt a broad definition of “strategic risks”. Experts and officials in Australia, Japan, South Korea, and the UK did not view strategic risks as limited to nuclear use, inadvertent or accidental nuclear escalation, or risks inherent to the existence of nuclear weapons. Instead, most interviewees defined as strategic those risks that seriously threatened their countries’ national interests in the context of a complex regional security environment.¹⁴ Nevertheless, most of the identified strategic risks, ranging from an escalation of Taiwan tensions to a breakdown of US alliance commitments, have a nuclear dimension.

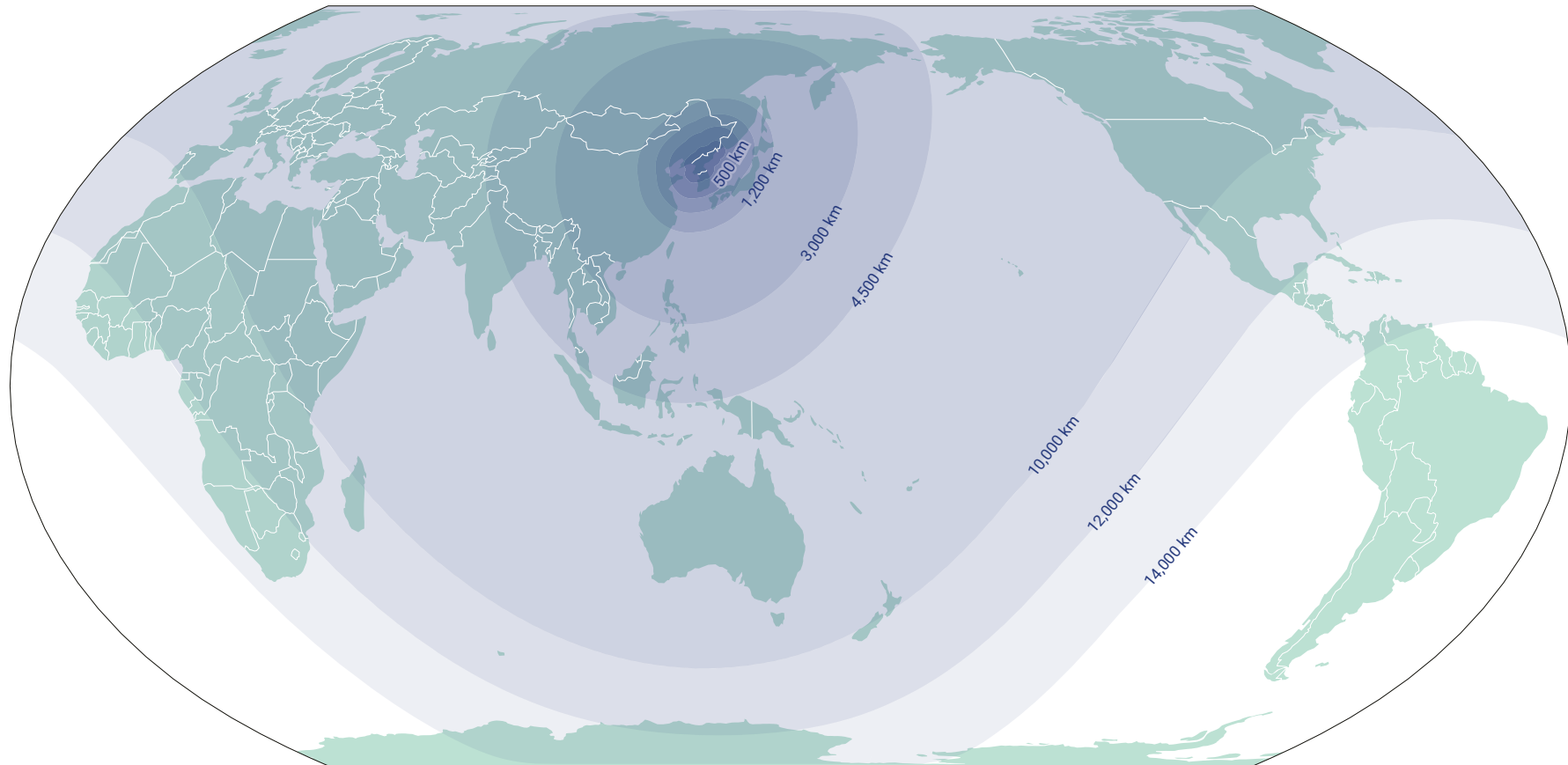
Throughout the project, participants from all four countries identified strategic risks emanating from a shared set of concerns, notably North Korea’s nuclear posture and expansion, China’s assertive behaviour and military build-up, as well as twin concerns over a potential US retreat from the region contrasted with the risk of being entrapped in a conflict of somebody else’s choosing. Yet, there was disagreement on the relative immediacy and significance of these threats as well as on their impact on the global nuclear order.¹⁵

North Korea: Immediate nuclear risks

All four states view North Korea’s aggressive nuclear posture as a strategic risk, though they disagree on its degree of immediacy. South Korea perceives a potential North Korean military aggression as the most direct threat, especially after Pyongyang’s recent adoption of a pre-emptive nuclear doctrine allowing for a first strike, including against non-nuclear-armed states, in a broad range of vaguely defined circumstances.¹⁶ Similarly, Japan considers North Korea as the most direct threat, given its geographical proximity and the high likelihood of Japan becoming a target of a potential North Korean nuclear strike in a potential conflict scenario. The UK is, for geographical reasons, less concerned about any direct threat from North Korea than about the impact of Pyongyang’s policies on nuclear risks in the region more broadly. Australia is assured that the US presence in the region suffices to manage the threat posed by North Korea’s nuclear arsenal, which it ranks below concerns over China’s military expansion and assertiveness in the region.

South Korea perceives North Korea as the most immediate and significant strategic risk. This perception has a clear nuclear dimension. Project participants suggested that the South Korean public considered Pyongyang’s nuclear arsenal an “existential threat”, and North Korea’s increasingly aggressive nuclear posture following both doctrinal and technological developments over the past years had aggravated these concerns. With North Korea’s announcement of the “Law on the state policy on the nuclear forces” in September 2022, Pyongyang now claims to be both a “responsible nuclear weapon state” and to possess an “irreversible” status as a nuclear power. Further, it reserves the right to use nuclear weapons pre-emptively and against non-nuclear-armed states, thus significantly lowering the nuclear threshold.¹⁷ South Korean participants explained that this meant that North Korea had adopted the “most dangerous and most

Figure 1: Ranges of North Korean nuclear-capable missiles



Land-based ballistic missiles

Short-range ballistic missiles

Hwasong-11	120–170 km
Hwasong-5/6	300/500 km
KN18/21 (US designation)	250/450 km
Hwasong-11 Na	
KN 23/24/25 (US designation)	380–800 km

Medium-range ballistic missiles

Hwasong-7	> 1,200 km
Hwasong-9	1,000 km
Pukguksong-2	> 1,000 km
Hwasong-8 / unnamed "hypersonic missile"	> 1,000 km

Intermediate-range ballistic missiles

Hwasong-10	> 3,000 km
Hwasong-12	> 4,500 km

Intercontinental ballistic missiles

Hwasong-14	> 10,000 km
Hwasong-15	> 12,000 km
Hwasong-17	> 14,000 km

Other delivery platforms (not illustrated)

Submarine-launched ballistic missiles

Pukguksong-1	> 1,000 km
Pukguksong-3	1,900–2,500 km
Pukguksong-4	3,500–5,400 km
Pukguksong-5	?
Pukguksong-6	?
Small "New Type" SLBM	400–600 km

Land-attack cruise missile 1,500 km

Source: Hans M. Kristensen and Matt Korda, 'North Korean nuclear weapons', *Bulletin of the Atomic Scientists*, 78.5 (2022), pp. 273–294, 281–282.

Figure 1 shows the ranges of missiles in the North Korean arsenal assessed to be nuclear-capable. Ranges are measured from an approximate radius of North Korea, not actual or assumed launch sites, and are only intended to be indicative.

There is a growing sense of urgency in Japan to improve defensive capabilities, notably through increased defence spending and investments in missile defence.

aggressive” nuclear doctrine of the nine nuclear-armed states in the world today. Moreover, interviewees expressed concern that this declaratory policy was backed up by real capabilities, as North Korea was enhancing its nuclear arsenal, notably its missile capabilities.

South Korean responses to this perceived risk have increasingly focused on deterrence. The Moon administration (2017–2022) aimed to achieve peace and economic prosperity on the Korean Peninsula through a functionalist and “peace-regime building” approach, even if it simultaneously increased military spending at a faster rate than its conservative predecessors.¹⁸ Yet Moon’s ambition to declare an end to the Korean War could not be realised after the failure of the 2019 US–North Korea summit in Hanoi. The new conservative Yoon administration (2022–present) has opted for a different approach, putting the rhetorical focus back on North Korea’s denuclearisation while strengthening the US–South Korea alliance and deterrence capability. Yoon is expected to take a firm stance against the North Korean nuclear and military build-up, all the while keeping the door open for dialogue.¹⁹ Following North Korea’s recent doctrinal changes and numerous mid- to long-range missile tests, more conservative, security-oriented factions among South Korean politicians and experts have called for tougher containment policies *vis-a-vis* North Korea, including enhanced US extended deterrence, an improvement of relations with Japan, and even the development of a South Korean nuclear weapons programme.

Japan also views North Korea’s nuclear posture as the most urgent strategic risk, though it considers China the more significant threat in the longer term. In particular, there is a clear concern that Japan would be likely to be hit by North Korean missile strikes in a potential military confrontation on the Korean Peninsula, even if Pyongyang might prioritise South Korean and US targets. For instance, one Japanese official stressed that the North Korean regime was an irrational actor, and that Japan could be exposed to North Korean saturation attacks in a clash with other regional states. In this context, recent advancements in North Korea’s nuclear and missile technology have caused concern. Like in South Korea, there is apprehension in Japan that Pyongyang might have achieved the miniaturisation of nuclear warheads, enabling it to conduct nuclear strikes against Japan. There are also concerns about the growing number of North Korean missiles that could be used for intermediate-range offensive strike purposes, which Japan might be incapable of intercepting. In 2022, North Korea conducted a successful test launch of two Hwasong-12 missiles, which flew directly over Japan. This marked the first time Pyongyang had flown a missile over Japan that was specifically designed to carry a nuclear warhead.²⁰ Furthermore, Japanese participants expressed concern over the secondary effects of North Korean behaviour on regional security and proliferation. A potential South Korean nuclear weapons programme to deter North Korea, in particular, could be perceived as a direct threat to Japan, several analysts concurred.

In light of these risks, there is an growing sense of urgency in Japan to improve defensive capabilities, notably through increased defence spending and investments in missile defence, as well as to work closely with allies to deter and defend against potential North

In contrast to the perception of North Korea as a relatively narrow nuclear threat, the findings of this project suggest that all states examined by this study see much broader strategic risks emerging from China's assertive foreign policy, which is backed up by its economic clout and expanding nuclear arsenal.

Korean aggression.²¹ However, project participants pointed out that an ageing population and declining economy limited the resources available to meet these defence requirements.

To **Australia**, North Korea's nuclear status is a comparatively minor strategic concern. Analysts acknowledged that Pyongyang's arsenal constituted a threat but did not discuss it in much detail. The Albanese government has also been largely silent on North Korea's recent missile tests. This relatively low level of concern may be due to a primary preoccupation with China and US assurance regarding the threat posed by North Korea. Indeed, Australia perceives China as its primary security concern, whereas on North Korea, Australian leaders seem largely content to follow the lead of the United States.²²

The **UK** views North Korea as the main proliferation risk in the region due to its aggressive development of nuclear weapons and ballistic missiles. North Korea's provocative behaviour and rhetoric, including threats to use nuclear weapons pre-emptively against its adversaries, have heightened concerns that the country's actions could prompt other regional states, notably South Korea, but to some extent also Japan, to pursue a nuclear status.

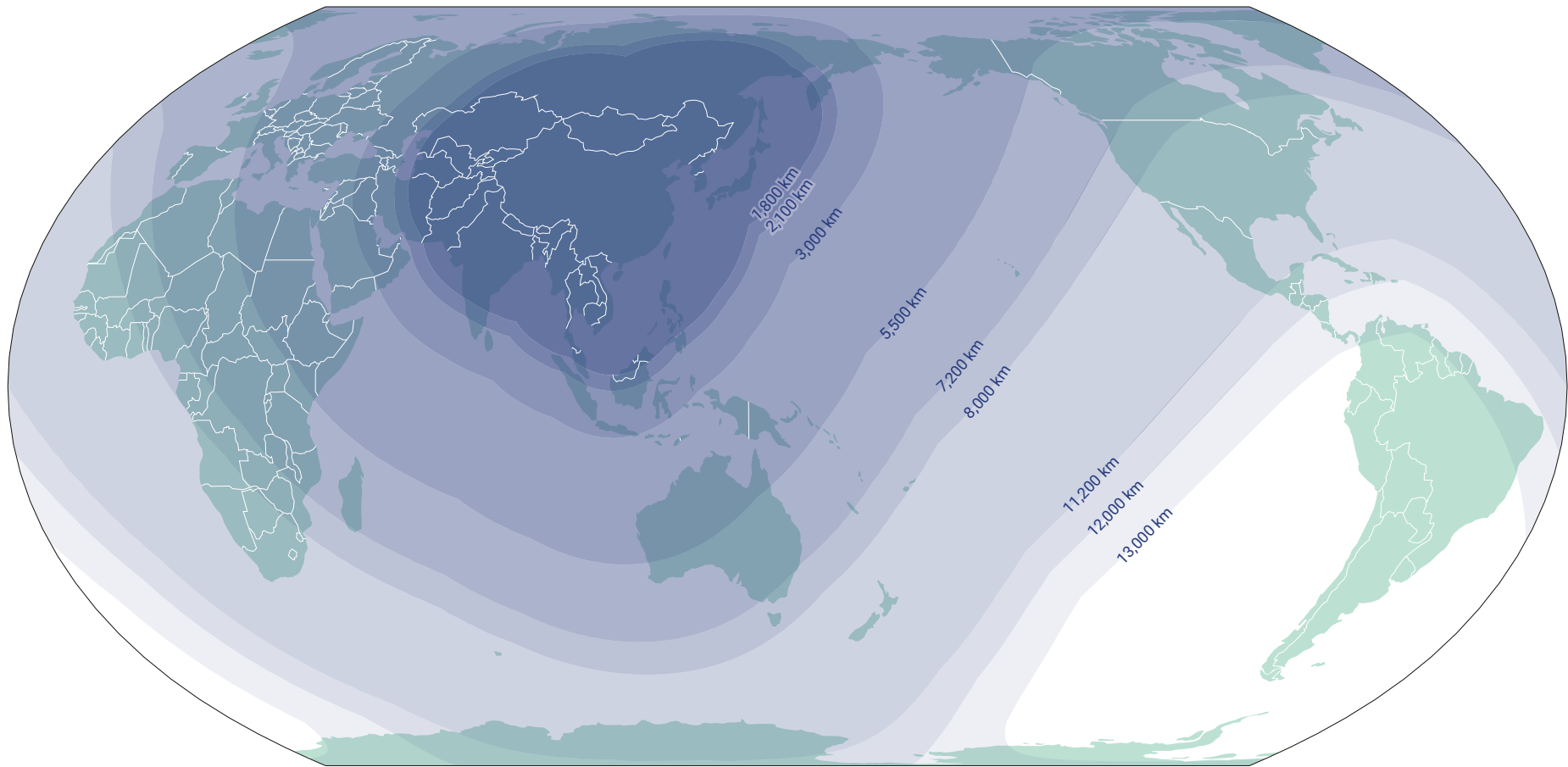
China: Broader long-term risks

In contrast to the perception of North Korea as a relatively narrow nuclear threat, the findings of this project suggest that all states examined by this study see much broader strategic risks emerging from China's assertive foreign policy, which is backed up by its economic clout and expanding nuclear arsenal. Australia and Japan are most concerned about the direct threat posed to their sovereignty by Chinese behaviour, particularly around Taiwan, and the risk of being dragged into an armed conflict with China. By contrast, South Korea and the UK are more apprehensive of the wider disruptive effects of a confrontation involving China on regional stability, based on economic as well as security and proliferation concerns.

Australia is particularly concerned about the risk of being pulled into a conflict between the United States and China. Potential scenarios include a Chinese invasion of Taiwan, which would likely elicit a US response; a Chinese attempt to seize the Senkaku islands, which could trigger a conflict involving the United States and Japan; or a crisis on the Korean Peninsula that would pull in both the United States and China. An analyst noted that Australia would likely become a target of Chinese military action in such conflict scenarios, given its close relationship with Washington and the existence of US military facilities on Australian soil.²³

This fear is aggravated by China's increasingly assertive behaviour in the region. There is deep mistrust towards China in Australia, due to a broad range of issues, including Beijing's economic coercion targeting regional states, attempts to roll back US influence, and interference in Australian public affairs, as well as Chinese military activities and non-compliance with international treaties. For instance, Australia expressed concerns over China's violation of the United Nations Convention on the Law of the Sea, as well as its human rights record and use of unfair trade practices.

Figure 2: Ranges of Chinese nuclear-capable missiles



Land-based ballistic missiles

Medium-range ballistic missiles

DF-17 1,800+ km
DF-21A/E 2,100+ km

Intermediate-range ballistic missiles

DF-26 3,000+ km

Intercontinental ballistic missiles

DF-4 5,500 km
DF-5A 12,000 km
DF-5B 13,000 km
DF-5C 13,000 km
DF-27 5,000–8,000 km
DF-31 7,200 km
DF-31A 11,200 km
DF-31AG 11,200 km
DF-41 12,000 km

Sea/air-launched ballistic missiles (not illustrated)

Submarine-launched ballistic missiles

JL-2 7,000+ km
JL-3 9,000+ km

Aircraft

H-6K 3,100+ km
H-6N 3,100+ km
H-20 ?

Source: Hans M. Kristensen, Matt Korda, and Eliana Reynolds, 'Chinese nuclear weapons', *Bulletin of the Atomic Scientists*, 79.2 (2023), pp. 108–133, 109. Figure 1 shows the ranges of missiles in the Chinese arsenal assessed to be nuclear-capable. Ranges are measured from an approximate radius of mainland China, not actual or assumed launch sites, and are only intended to be indicative.

In this wider context of growing regional instability, analysts are apprehensive of the modernisation of China's nuclear forces as well. This suggests that, from an Australian perspective, it is not Beijing's quantitative nuclear build-up as such, but its opaque and unpredictable behaviour that has increased the risk of war and the use of nuclear weapons in the region.

There is no consensus on what Australia's response to these perceived threats should entail, although a focus on deterrence measures appears to be inevitable. Indeed, the current Australian government has invested in both strengthened defence capabilities and stronger ties with the United States and like-minded countries to prepare for an increasingly complex regional environment and a potential new Cold War. Canberra has also sought to draw attention to China's secret military activities and non-compliance with international treaties. By contrast, there have been limited opportunities for dialogue due to China's freeze on diplomatic channels in response to the Australian government's call for an international investigation into the origins of the COVID-19 pandemic, which Beijing viewed as an affront and which resulted in the suspension of high-level talks.²⁴

However, there was also a competing view among some project participants, according to which Canberra had mishandled its relationship with China and both sides should take steps to understand each other's concerns and work towards a mutually beneficial and peaceful coexistence. From this perspective, Australia's efforts to strengthen alliances and partnerships, such as the Quadrilateral Security Dialogue and AUKUS, had created the impression in Beijing that Canberra sought to contain China. The announcement of the AUKUS alliance in particular had given rise to Chinese concerns that the submarines could in future be deployed in conjunction with US hunter-killer submarines to support US attempts to constrain China's rise. These perceptions had fostered mistrust, undermined dialogue outside of the economic and trade domain, and given rise to zero-sum competition with both countries strengthening their military capabilities, the argument went.

In a similar vein, some Australian analysts suggested that the firm anti-China narrative of the Morrison government, which left office in 2022, had undermined peaceful coexistence through unnecessarily provocative policies, which had led to an imbalanced understanding of China and Australia's strategic interests. However, the new Labor government has to some extent managed to stabilise relations with China, ending the diplomatic freeze, without being labelled "soft" on China. According to some observers, the Albanese government should continue focusing on improving bilateral trade relations with China in the near term.

From the point of view of **Japan**, threats emerging from China constitute the major medium-term strategic risk. Mirroring Australian perceptions, this concern appears to be driven by both general apprehension over Beijing's assertive practices and more concrete fears of a potential military confrontation over Taiwan, which Tokyo considers a close ally, or a Chinese attempt to seize the Senkaku islands. While Japanese officials did not see an immediate risk of a Chinese invasion of Taiwan, the authoritarian direction of the Xi Jinping administration, China's military build-up,

South Korea's tensions with China over THAAD are symptomatic of the challenge of deterring and defending against North Korea without alienating Beijing.

its growing GDP, and aggressive rhetoric all increased concerns. Analysts noted that an act of Chinese aggression against Taiwan would have both immediate and longer-term adverse effects on Japan. If the United States were to become involved in a potential conflict, Japan could become the target of Chinese military action as it hosts US military bases.²⁵ In this context, there is a particular concern that Japanese missile defence capabilities would be no match for China's expanding missile force (mirroring the concerns discussed above about insufficient defences to counter North Korean missiles). In the longer term, if Beijing captured Taiwan, its sphere of influence would expand, potentially precipitating a US pullback and loss of credibility in the region, a project participant suggested. China would be likely to increase its control over the East China Sea, which could pose a "vital or even an existential threat to Japan"²⁶.

Again, beyond this specific threat of regional conflict, Japan perceives China's assertive foreign policy as a broader risk, including notably Beijing's attempts to pursue its interests and expand its influence over countries and organisations utilising its economic clout and aggressive "wolf warrior" diplomacy. This concern is exacerbated by the perception that regional stability is threatened by a relative decline of Japan's power *vis-a-vis* China, Russia, and North Korea, due to an ageing population and economic stagnation.

To mitigate these risks, Japanese analysts and officials called for a twin approach of deterrence and dialogue. Accordingly, there is a need to address the decline of Japan's national power, invest in defence spending, and maintain credible US extended deterrence; but it is also necessary to promote dialogue, notably between the United States and China, on risk reduction and arms control measures, as well as between regional states, to ease tensions in East Asia.

While the current **South Korean** government is facing contrasting economic and strategic pressures, there is a growing public perception of China as a threat. Project participants particularly stressed the need to balance Seoul's reliance on the United States for security, notably *vis-a-vis* North Korea, with its interest in maintaining economic ties with China – despite Seoul's experience with Chinese economic pressure following South Korea's deployment of the Terminal High Altitude Area Defense (THAAD) system in 2017.²⁷ Economic relations with China are crucial for South Korea, with estimates showing exports worth \$158 billion going to China in 2021 alone. By comparison, South Korea's exports to Japan were worth \$30.1 billion in the same year and those to the US \$95.9 billion.²⁸ While South Korea, to some extent, shares Australia's and Japan's fears of being dragged into a conflict over Taiwan, it is more concerned about the impact of structural competition between China and the United States, and the resulting "systemic fragmentation"²⁹. In this context, there is also apprehension over China's growing economic clout, notably in high-tech industries that compete with South Korean exports.

Against this backdrop, South Korean observers largely agreed that the Yoon government, which has been in power since 2022, should aim to improve South Korea-China relations on the basis of mutual respect for each other's national interests.³⁰

The new administration, they noted, had so far maintained the rhetorical ambiguity of its predecessors regarding China. Despite anti-China rhetoric during the election, once in office, the government's statements on Taiwan had remained focused on promoting broader Indo-Pacific stability. Still, South Korean observers explained, there was clear support in South Korea for the new administration's pursuit of closer alignment with the United States, which was considered a matter of national interest and shared values.

The South Korean government's torn position on China is particularly evident in discussions on the "three noes" that China sought to impose on the previous Moon administration: no deployment of additional THAAD systems,³¹ no US-South Korea-Japan trilateral alliance, and no integrated missile defence with the United States. While one South Korean expert described South Korea's adherence to the three noes as a casual gesture of goodwill to China, an official argued that it constituted a dangerous concession to Beijing that could embolden North Korea. South Korea's tensions with China over THAAD are symptomatic of the challenge of deterring and defending against North Korea without alienating Beijing. Viewing THAAD as an important defensive capability against Pyongyang, the Yoon government had sought to normalise its deployment in the eyes of China, expanding support facilities to maintain the system but halting the acquisition of further systems, analysts explained.

The **UK** recognises the dilemmas Asia-Pacific countries face in their relations with China and is mainly concerned about the broader implications of China's rise for regional stability. There is particular apprehension around the potentially disruptive effects of Beijing's increasing assertiveness in the region, which is backed up by its growing economic and military power, especially around Taiwan and the South China Sea. However, there is also recognition that economic ties with China must be maintained and managed, which highlights the need to balance security concerns with free trade and investment interests. Indeed, disruptions to trade with China or within the region would be a major risk factor for the UK, analysts noted.

British project participants expressed particular concern over the lack of transparency in China's nuclear weapons programme and highlighted the need for Beijing to engage in dialogue with other nuclear-weapons states to reduce tensions and prevent conflict. China's nuclear modernisation is a particular matter of concern in this regard. According to one UK analyst, China's ongoing modernisation went hand in hand with a more significant role for nuclear weapons in its military strategy and a growing sense of ambiguity about the conditions for a potential use of nuclear weapons, contrasting Beijing's official no-first-use policy. Furthermore, the reported supply of highly enriched uranium (HEU) by Russia to Chinese CFR-600 sodium-cooled fast breeder reactors, which according to the US Department of Defense, will allow China to produce "enough plutonium for dozens of warheads annually", fuels concerns about a potential Chinese sprint to parity with US and Russian arsenals – a development the Foreign Affairs Committee of the US Congress considers a clear "violation of Article VI of the NPT"³². Indeed, according to data from the Royal United Services Institute, "Russia exported almost seven times

as much highly-enriched uranium to China for the CFR-600 as all the material removed worldwide under US and IAEA (International Atomic Energy Agency) auspices in the last three decades”³³. This will undoubtedly be a matter of concern for the UK as well.

British opinions regarding engagement with China vary. Some analysts and officials highlighted the need to address China’s assertive behaviour and maintain the regional balance of power through strengthened relations with Australia, Japan, and South Korea, and a greater UK presence in the region. In this context, one participant stressed the need to clearly communicate the costs of any military action against Taiwan to Beijing. Conversely, other analysts emphasised a need for pragmatism and recommended engaging China through dialogue and cooperation initiatives, for example in the scientific field. Accordingly, the UK could potentially serve as a mediator between China and other nations in the region, though the prospects for such an approach remained questionable in the current security environment.

Alliance politics: Twin concerns of assurance and entrapment

Bilateral relations with the United States

In light of the perceived strategic risks stemming from China and North Korea, the findings of this project suggest that Australia, Japan, and South Korea seek to balance their desire for US assurance with their fear of entrapment. Mirroring these sentiments, most British participants considered the US presence in the region a stabilising factor, but many also warned against forcing regional states to choose sides.

South Korea, mindful of the nuclear and conventional threat from North Korea, is concerned about the reliability of the US commitment to the region. In some quarters, this has fuelled calls for a domestic South Korean nuclear weapons programme, although many prefer strengthening the extended deterrence relationship with the United States, including through a NATO-style nuclear sharing arrangement. In line with this sentiment, the Moon administration maintained regular dialogue with US defence officials. The Yoon administration has been keen to upgrade these conversations to a broader format, as exemplified most prominently by the restart of the Extended Deterrence Strategy and Consultation Group (EDSCG)³⁴ and the April 2023 announcement of “a new Nuclear Consultative Group (NCG) to strengthen extended deterrence, discuss nuclear and strategic planning, and manage the threat to the nonproliferation regime posed by the Democratic People’s Republic of Korea”³⁵. This was accompanied by a range of broader cooperative measures, including for the first time a dialogue on next generation critical and emerging technologies led by the respective national security advisers. This indicates that the United States and South Korea are attempting to enhance extended deterrence across the spectrum of defence capabilities, including to address North Korean cyber activities.³⁶

Despite this strong desire for reinforced US assurance, however, there is a parallel fear of entrapment. While the US has consistently supported South Korean defence, polls conducted in 2018 and 2019 indicated that credible security guarantees raise concerns in South Korea over the United States potentially being willing to escalate a conflict on the Korean Peninsula, when South Korea is not.³⁷ This fear of becoming trapped in a nuclear confrontation between the United States and North Korea was amplified by Donald Trump’s 2017 “fire and fury” rhetoric. Closer consultation on extended deterrence between South Korea and the United States could alleviate South Korean concerns of ending up outside of the US decision loop, if nuclear weapons were to be used in a crisis,³⁸ which by extension would remove a powerful motivator for South Korea to pursue its own nuclear weapons capability.

A similar dilemma was evident in interviews in **Japan**. On the one hand, there are calls for a strengthened extended deterrence relationship with Washington due to fears of abandonment. In particular, there is a concern that the United States might withdraw from the region following a Chinese invasion of Taiwan and that a future US president might prioritise China’s interests at the expense of Japan’s. On the other hand, Tokyo too wishes to have more say in US nuclear planning concerning the region, for example through more institutionalised deterrence talks, to avoid being dragged into a nuclear conflict.

Australia also seeks to maintain the US presence in the region and relies on Washington's lead to tackle risks emanating from China and North Korea. Indeed, Canberra provided significant support to Ukraine following Russia's full-scale invasion in 2022, which analysts interpreted as a political signal to Washington that Australia was willing to pull its weight in any future conflict. At the same time, however, there is also some degree of apprehension in Australia of being dragged into a US confrontation with China or North Korea.³⁹

Mirroring the views of regional countries, the **UK** is concerned that the role of the United States as a security provider in the Asia-Pacific is being diminished by China's growing influence. Yet, British analysts also acknowledged fears among US allies in the region that they could be drawn into conflicts that were not of their own choosing. Project participants recognised this as a risk for Australia due to the AUKUS deal, but also for South Korea, which fears that the United States might quickly escalate a conflict on the Korean Peninsula.

AUKUS

Project participants identified the AUKUS agreement, which was signed in 2021 between Australia, the United Kingdom, and the United States, as the most significant regional response to China's growing assertiveness in the region. In the framework of the deal, they explained, Australia would obtain nuclear-powered submarines, which would enhance the range and speed of its naval capabilities and provide the means to intervene in a crisis in the Taiwan Strait. However, the AUKUS agreement has been highly controversial, attracting criticism both domestically and internationally.

Australian analysts disagreed on the merits of the AUKUS deal. Many were supportive, arguing that AUKUS was not a proliferation concern because there was no immediate risk of fissile material diversion from the submarine reactor core, and currently planned measures to isolate the fissile material, while outside of IAEA safeguards, appeared to be sufficient. Additionally, there was no political will in Australia to use this material to develop nuclear weapons, they added. When one analyst noted that it was difficult to guarantee the position future governments would take on nuclear weapons – especially in the context of a changing geopolitical environment – this triggered some controversy among Australian project participants, including officials who emphatically disagreed. The proliferation issue aside, however, many described the deal as an expensive and politically motivated response to questionable assessments of Chinese capabilities and strategic intentions. According to this view, AUKUS comes at a high opportunity cost, binding significant resources and hindering acquisitions, for instance of other submarine types, that could strengthen Australia's security.⁴⁰

South Korea does not view the AUKUS deal as a proliferation risk in itself and appears confident that the AUKUS parties will be able to safely and securely manage the fissile material in the submarine's reactor core, the findings of this project suggest. This is in line with a recent joint US-South Korean presidential statement from April 2023, in which President Yoon "expressed

support for the United States' cooperative efforts to ensure peace and security in the region, including through the launch of AUKUS⁴¹. South Korean participants were more concerned over Chinese reactions to the deal, and how those might spoil progress on other non-proliferation issues, in particular if China's narrative on AUKUS' alleged malevolent objectives gained traction among ASEAN and non-aligned movement states. Consequently, South Korean participants called for accurate and comprehensive information on the specifics of the agreement to counter misleading narratives.

From a deterrence perspective, most South Korean experts and officials recognised the assurance AUKUS provided to Australia but simultaneously expressed dissatisfaction that the United States had offered such a valuable asset to an ally so far removed from any regional flashpoints. In their view, South Korea was the regional ally facing the most pressing threat (from North Korea). It had also long been lobbying for nuclear-powered submarine technology and, according to one analyst, was better suited for developing nuclear-powered submarines as its nuclear industrial base was already well developed, meaning that it would mainly need operational support from a hypothetical partner. Against this backdrop, the AUKUS deal reignited latent concerns in South Korea that the United States considered Seoul a "second-tier" (or even "third-tier") alliance partner.

Japan generally views AUKUS positively, considering nuclear submarines a justified investment for Australia and a useful means of keeping the United States involved in the region. Project participants agreed that this benefited both Japan and Australia, as both countries would be unable to win a military conflict with China by themselves – despite Japanese plans to increase defence spending and the potential Australian acquisition of capabilities through AUKUS.

The AUKUS deal reignited latent concerns in South Korea that the United States considered Seoul a "second-tier" (or even "third-tier") alliance partner.

The prism of the war in Ukraine

Whereas Russia's war in Ukraine is perceived as a direct strategic risk by the United Kingdom, it serves as an additional prism through which Australia, Japan, and South Korea assess their security environment. However, participants widely disagreed on its implications for regional stability.

British experts and officials described the war in Ukraine as a strategic risk for the **United Kingdom** but had differing opinions on its impact on stability in the Asia-Pacific region. On the one hand, many participants believed that China could learn from Russia's use of nuclear threats to shield its war of aggression against Ukraine. As a result, Beijing might increasingly leverage its nuclear arsenal in political and territorial disputes to further its national interests. On the other hand, some analysts thought that NATO's unified and resolved response to the war in Ukraine had signalled to China that an invasion of Taiwan would engender high costs, which would inspire caution in Beijing. Others suggested that the Russian war against Ukraine had had little impact on the Asia-Pacific region.⁴²

In **Australia**, although there are concerns in some quarters that the war in Ukraine might distract the United States, providing a window of opportunity for a Chinese invasion of Taiwan, there seems to be a general belief that the conflict has made such a move less likely. Mirroring British analysts and officials, several participants suggested that the level of support for Ukraine and the consequences of the invasion for Russia would likely deter China from invading Taiwan. Accordingly, Beijing would be careful to avoid the international isolation and long-term economic consequences Russia was experiencing due to its war, and Russia's military losses in Ukraine suggested that China would face even greater difficulties in a potential invasion across the Taiwan Strait.

In **Japan**, Russia's war against Ukraine has demonstrated the risk of a possible similar crisis in the Taiwan Strait, which has led to increased government and public support for a strengthened defence posture. In this context, support for enhanced US extended deterrence arrangements has grown, possibly including nuclear sharing, which has been perceived as effective in deterring Russia from attacking NATO countries. Conversely, isolated calls for a domestic nuclear weapons programme have not gained traction, largely due to the strong relationship with the United States. These calls could become louder if the alliance was to weaken, or if South Korea was to develop nuclear weapons.⁴³ Experts and officials also expressed particular concern about the effect of a potential Russian nuclear weapons use in Ukraine on the NPT and the wider non-proliferation regime.

In **South Korea**, Russia's invasion of Ukraine has given rise to particular apprehension including comparisons with the threat Seoul faces from Pyongyang. There is a general concern that the role North Korea attaches to its nuclear arsenal will increase as a result of the Russian war. Accordingly, the invasion of Ukraine could have reinforced North Korea's belief that giving up its nuclear weapons would increase its vulnerability to outside aggression.⁴⁴ Pyongyang might also try to copy Russia's use of nuclear rhetoric as a shield against Western intervention in the war. Although North Korea lacks the conventional capabilities to sustain a war on the Korean Peninsula, it could employ nuclear threats to achieve its objectives. Like their Japanese colleagues, South Korean

analysts and officials were furthermore worried over the impact of a potential use of nuclear weapons by Russia, a nuclear-weapons state, against Ukraine, a non-nuclear weapons state, on the normative foundation of the NPT.

In addition, South Korean participants expressed concern that the United States might get distracted by the war in Ukraine, although they did not expect this to affect the reliability of the US commitment to South Korea as such. Still, the ongoing war has boosted calls for enhanced US extended deterrence.

Implications for the nuclear non-proliferation regime

Throughout the project, British, Japanese, and Australian participants were apprehensive of both regional proliferation and broader stresses on the non-proliferation regime. South Korea, the object of some of these fears, appeared comparatively less concerned.

British experts cited a broad range of threats to the nuclear non-proliferation regime both within the region and beyond. In the Asia-Pacific, North Korea's continued development of nuclear weapons and adoption of an aggressive nuclear doctrine and posture were identified as the most pressing risk, which could prompt other regional countries, notably South Korea, to seek their own deterrents. This concern was exacerbated by China's nuclear modernisation, eroding trust in US security guarantees, and Russia's nuclear rhetoric in the context of its war against Ukraine, which had demonstrated how nuclear weapons could be used to shield aggression.

Moving beyond the region, participants expressed apprehension over the uncertain future of US-Russia bilateral strategic nuclear arms control, notably the New Strategic Arms Reduction Treaty (New START); China's reluctance to engage in arms control talks with the United States and Russia; and broader issues with the NPT regime, notably the lack of disarmament and tensions between nuclear-weapons states and non-nuclear weapons states. Given these developments, some questioned the viability and usefulness of the NPT.

Against the backdrop of this bleak assessment, analysts stressed the need for risk reduction and arms control among nuclear-armed states on the one hand, and on the other hand, assurance through enhanced British cooperation with regional states as well as conventional presence in the region. However, it is worth pointing out that the UK's 2021 decision to increase the cap on its nuclear stockpile⁴⁵ was viewed with scepticism by some South Korean and Japanese observers. In their view, the UK had previously been regarded as a progressive nuclear-weapons state, but the increased cap of its nuclear stockpile had altered that perception, allegedly to the detriment of the UK's credibility to speak with a moderating voice among P5 members or the wider NPT community.

There is a similar pessimism in **Japan** about the future of the NPT and the impact of regional nuclear threats on the non-proliferation regime. Participants were especially apprehensive of the risk of South Korean proliferation, which they believed could trigger a debate on nuclear armament in Japan. One participant warned that a Russian use of nuclear weapons in Ukraine could prompt others to seek their own nuclear deterrent, thus leading to the collapse of the NPT. Another observer went further, suggesting that the NPT was not only in jeopardy but might have already lost its effectiveness as China was rapidly expanding its nuclear capabilities, calling into question Article VI of the NPT.⁴⁶

Against the backdrop of this pessimistic assessment, Japanese interviewees stressed the need to protect the NPT and strengthen the nuclear taboo but also noted the treaty's limitations. One participant pointed out that while efforts to strengthen international norms on nuclear disarmament and non-proliferation

One analyst suggested that the South Korean public tended to underestimate the political, diplomatic, and economic costs of developing and possessing nuclear weapons, while overestimating the benefits.

were commendable, they were insufficient to deal with countries like China, North Korea, and Russia, which did not abide by these norms. It was particularly problematic that democratic countries considered themselves bound by these norms, while non-democratic countries did not.

South Korean participants, by contrast, expressed a comparatively low level of concern over the state of the non-proliferation regime, although one official pointed out that the nuclear security issues related to the protection of the Zaporizhzhia power plant in Ukraine posed a challenge to the NPT. While some South Koreans noted that AUKUS might constitute a proliferation issue, they were confident in the AUKUS countries' assurances that no nuclear material would be diverted. There was, however, a concern that the deal could provide China with a reason to undermine international unity on proliferation issues. By and large, however, there appears to be relatively little concern over nuclear proliferation risks in South Korea, as reflected by the public support for a domestic nuclear weapons programme.

The rationale for South Korean calls to acquire nuclear weapons is the perceived need for an effective deterrent against North Korean threats, independent of the United States. This is related to two conflicting concerns: that the United States might decide not to use nuclear weapons against North Korea in a situation in which South Korea would deem it necessary; and that the United States might decide to use nuclear weapons in a situation in which South Korea would not deem it necessary. The solution in either case would be an independent South Korean nuclear arsenal. It is worth emphasising, however, that some South Korean analysts who participated in this project advocated more nuanced options, such as involving Seoul more in the US decision-making process.⁴⁷ One South Korean observer also argued in favour of an "Asian nuclear planning group" which they hoped would eventually lead to the deployment of US tactical nuclear weapons on the Korean Peninsula. They acknowledged that doing so would have a negative impact on the nuclear non-proliferation regime but argued that this effect would be less detrimental than that of an independent South Korean nuclear deterrent.

In light of these discussions, some project participants stressed that South Korea was not seriously considering developing nuclear weapons as this would undermine the country's commitment to peaceful uses of nuclear power, including reactor exports and its expanding domestic nuclear power sector.⁴⁸ Against this backdrop, one analyst suggested that the South Korean public tended to underestimate the political, diplomatic, and economic costs of developing and possessing nuclear weapons. For example, if South Korea were to withdraw from the NPT, it could lose almost a third of its total electricity production from nuclear power generation as international cooperation with the country's nuclear energy programme, including imports of enriched uranium fuel on which South Korea's reactors depend, would most likely be suspended.⁴⁹ Additionally, a withdrawal from the NPT would lead to the perception that South Korea is in violation of its safeguards agreement with the IAEA, which would make it difficult for the international community to justify South Korean exports of nuclear technology due to proliferation concerns. The growing South Korean reactor export industry could collapse as

a result. South Korea is a resource-poor, trade-dependent country that can ill afford to lose such important trade relationships. Additionally, the US-South Korea civil nuclear agreement stipulates that Seoul cannot use US-supplied nuclear materials and equipment for weapons purposes. If those terms were breached, Washington could request the return of these materials and equipment.⁵⁰ Finally, the risks and benefits equation should also consider the impact of nuclear testing, which would contravene the Comprehensive Nuclear-Test-Ban Treaty (CTBT) and could trigger public opposition.

To **Australia**, the main nuclear proliferation issue is China's nuclear modernisation and build-up. Conversely, Australian participants considered fears of a South Korean nuclear breakout overblown, despite awareness of the nuclear domino effect such a scenario could trigger, potentially driving Japanese or even Taiwanese proliferation. Australian analysts were divided on the effects of AUKUS, although Australia consistently countered AUKUS-related proliferation concerns, arguing that they were working to ensure that HEU would remain confined to the submarine reactor cores.

Table 1, below, summarises Australian, Japanese, South Korean, and British perceptions of, and responses to, risks associated with North Korean, Chinese, and US policies, the war in Ukraine, and general nuclear proliferation issues in the region. It does not claim to provide an exhaustive or comprehensive picture of any of these countries' perceptions and policies. The contradictory nature of some responses illustrates the breadth of domestic policy debates.

Table 1: Summary of Australian, Japanese, South Korean, and British perceptions of risks associated with North Korean, Chinese, and US policies, the war in Ukraine, and general nuclear proliferation issues in the region

Asia-Pacific perceptions of strategic risks					
Risk	Australia	Japan	South Korea	UK (Asia-Pacific concerns)	
North Korea	Risk of being drawn into a direct conflict	Risk of direct aggression and escalation to war	Risk of direct aggression and escalation to war	Risk of regional proliferation	
		Risk of being drawn into a direct conflict	Risk of increasing nuclear arsenal and threats		
Responses	Supporting denuclearisation of North Korea	Strengthening counter-strike capabilities	Strengthening capabilities	Stressing need to make progress on arms control and risk reduction	
		Seeking enhanced assurances from, and deterrence cooperation with, the US	Debating domestic nuclear weapons		
		Supporting denuclearisation of North Korea	Seeking enhanced assurances from US	Supporting denuclearisation of North Korea	
			Supporting denuclearisation of North Korea		
China	Risk of being drawn into a direct conflict over Taiwan	Risk of being drawn into a direct conflict over Taiwan	Risk of regional instability	Risk of regional instability	
	Risk of economic coercion	Risk of losing autonomy	Risk of regional bloc formation and a new Cold War	Risk of nuclear expansion and modernisation	
	Risk of regional instability	Risk of regional instability	Risk of economic competition		
	Risks of nuclear expansion and modernisation	Risk of Chinese seizure of Senkaku islands	Risk of economic dependence		
Responses	Strengthening capabilities	Strengthening capabilities	Aligning with US	Stressing need for both strengthened deterrence and dialogue/scientific cooperation	
		Seeking enhanced assurance from US and like-minded states	Seeking enhanced assurances from, and deterrence cooperation with, the US		Maintaining rhetorical ambiguity
			Calling for dialogue on arms control and risk reduction		Balancing economic dependence on China with desire for US assurance
			Seeking “measured” approach		

Asia-Pacific perceptions of strategic risks

Risk	Australia	Japan	South Korea	UK (Asia-Pacific concerns)
United States	Risk of US withdrawal from the region	Risk of US withdrawal due to domestic politics	Risk of US prioritising other allies	Risk of diminishing US role due to China's growing regional influence, or the US prioritising Europe or domestic issues
	Risk of being drawn into US conflict with China or North Korea	Risk of US escalating without consultation	Risk of US withdrawal Risk of US escalating without consultation	
Responses	Seeking to strengthen existing alliance relationship	Seeking expanded relationship with US, including more institutionalised deterrence talks	Seeking expanded relationship with US and expanded consultation mechanisms	Supporting US deterrence policies in the Asia-Pacific
War in Ukraine	Risk of US being distracted in Europe	Risk of Russian nuclear use and impact on the NPT	Risk of US being distracted Risk of North Korea adopting "nuclear shadowing" strategies	Risk of China attaching higher priority to nuclear arsenal Risk of Russia-China convergence
			Seeking expanded relationship with US and expanded consultation mechanisms Some unofficial calls for developing nuclear weapons	
Nuclear proliferation	Risk of Chinese nuclear expansion and modernisation	Risk of Chinese nuclear expansion and modernisation	Risk of China using AUKUS as excuse to undermine non-proliferation regime	China's nuclear modernisation
	Risk of South Korean and Japanese proliferation	Risk of Russian nuclear use in Ukraine	Risk of Russian nuclear use in Ukraine	Chinese assistance to North Korean nuclear weapons programme
	Risk of North Korea's nuclear expansion	Risk of South Korean proliferation		Risk of South Korean proliferation
Responses	Stressing need to protect NPT and nuclear taboo	Stressing need to protect NPT and nuclear taboo	Stressing support for NPT to signal "moral high ground" and pursue commercial interests (peaceful use)	Stressing need for risk reduction and arms control

Policy recommendations

This section proposes practical recommendations for Australia, Japan, South Korea, and the UK, which could help enhance regional stability, reduce nuclear risks, and strengthen the NPT. The recommendations address China's assertive foreign policy, North Korea's nuclear behaviour, and regional challenges to the NPT, as well as the role of the UK in the Asia-Pacific.

To address the common concern of being drawn into a direct China-US conflict over Taiwan, **Australia, Japan, South Korea, and the UK should coordinate their efforts in groups such as the G20, the G7, and the P5 to call for high-level US and Chinese commitments to an official Track 1 dialogue.** Such a dialogue should include discussions to clarify intentions behind China's nuclear modernisation and build-up and US attempts to reduce Chinese economic influence on regional states. **Australia, Japan, South Korea, and the UK should also engage China on the value of crisis communication and encourage the resumption of US-Chinese military-to-military crisis communication channels, or set up their own bilateral or multilateral channels with China.** In February 2023, Beijing reportedly ignored the crisis communication hotline with Washington, refusing a call from US Defense Secretary Lloyd Austin about the shooting down of a Chinese balloon over US territory.⁵¹ China appears dismissive of crisis communication channels, seeing hotlines as a US tool "for trying to talk their way out of repercussions for a U.S. provocation"⁵². More bilateral and multilateral engagement is thus needed to find a mutually acceptable tool for clarifying intent and reducing tensions in a crisis.

Within the NPT framework, Australia, Japan, South Korea, and the UK should encourage the launch of a new working group (or groups) as part of the current review cycle to develop targeted risk reduction measures for the region – including through discussions on risk escalation scenarios and by exploring synergies between existing risk reduction initiatives, such as the Creating an Environment for Nuclear Disarmament (CEND) initiative⁵³ and the Stockholm Initiative.⁵⁴ The Risk Reduction Working Group that **Australia** is already leading together with the Philippines (since 2020) under the ASEAN Regional Forum is an excellent example of this approach in practice.⁵⁵ Such efforts could also seek to further engage China, in particular, on strengthening the taboo on nuclear use, building on the November 2022 G20 summit declaration, which noted that "the use or threat of use of nuclear weapons" was "inadmissible"⁵⁶.

Complementarily, **the UK, supported by Australia, Japan, and South Korea, should engage China on disarmament verification.** China may be reluctant to engage on disarmament verification due to concerns about the intrusiveness of certain verification measures that could reveal Chinese military secrets and a perceived US ability to cheat and evade verification measures.⁵⁷ But it is important to find common ground for practical cooperation with China that can lay the foundation for solving technical verification challenges in the future.⁵⁸ The UK could share its experience from the UK-Norway Initiative (UKNI),⁵⁹ the US-UK Program on Nonproliferation and Arms Control Technology, and the Quad Nuclear Verification Partnership (Norway, Sweden, United Kingdom, and United States), in order to facilitate the development of cooperative

disarmament verification initiatives for the region.⁶⁰ This could prepare the ground for future arms control and disarmament verification efforts, including eventually the verification of a future North Korean denuclearisation process. As participants of the International Partnership for Nuclear Disarmament Verification (IPNDV), and to encourage China to resume participating in IPNDV meetings, **the UK, Australia, Japan, and South Korea could also take the joint initiative to hold yearly workshops under the IPNDV format in north-east Asian cities.**⁶¹

South Korea does not appear close to seriously considering the development of its own nuclear weapons, but the risk of South Korean nuclear proliferation requires more urgent attention from policy-makers in partner countries. To address South Korea's primary security concern – the risk of direct aggression from North Korea – **the UK and Australia should provide additional support to South Korea on the basis of a clearly articulated condition that Seoul does not take any concrete steps towards acquiring a domestic nuclear weapons capability.** This aid could take the form of continued low-key military cooperation with South Korea, such as the April 2023 participation of 40 UK marines and Australian observers in a joint military exercise with South Korean and US troops.⁶² The UK, in particular, could also expand cooperation with South Korea on technological development, intelligence, and cyber-security issues.

In addition, **Australia, Japan, and the UK should use existing diplomatic channels to communicate the economic, political, and security implications of nuclear armament to South Korea.** In particular, they should make clear that any move towards nuclear weapons acquisition or development would be met with tough sanctions, especially against the South Korean nuclear energy industry.

The relationship between **Japan and South Korea** is the weakest and most complicated one among the four countries. Given the worsening regional security environment, it is particularly important that the two countries work towards sustainable solutions to their historical differences and a shared understanding of common security concerns, notably the threat posed by North Korea. In particular, the Yoon and Kishida administrations should address outstanding concerns about their recent deal to settle the issue of war-time slave labour,⁶³ and **build on the current positive momentum to solidify a bilateral framework that includes regular exchanges at both senior and working levels** to help avoid incidents such as the 2018 radar lock-on dispute⁶⁴ and alleviate any South Korean apprehension over Japan's deployment of counterstrike capabilities. Japanese support for South Korea to join the G7 would also boost bilateral relations.

Further, **Japan and South Korea should consider developing an exchange on potential scenarios and responses to a North Korean conventional and/or nuclear attack.** While the findings of this project suggest that Japan shares South Korea's concern over North Korean aggression, in a recent survey merely 39.6% of the Japanese respondents were in favour of supporting South Korea with ground troops in case of a conventional attack. This number only marginally increased to 44.4% in case of a nuclear

attack on South Korea.⁶⁵ Recognising that Japan is both likely to be targeted by North Korea in a potential conflict and apprehensive of South Korean calls for nuclear armament, a bilateral exchange with South Korea on conflict scenarios could eventually enable **Japan to agree to provide some form of aid (whether troops, arms, or medical care) to South Korea in the case of a North Korean aggression – on the strict condition that Seoul does not take any steps towards nuclear armament.**

The deteriorating security environment in the Asia-Pacific region risks undermining the existing nuclear order, but that development is by no means a foregone conclusion. The recommendations outlined in this report would serve to strengthen risk management and trust-building in the region. Australia, Japan, and South Korea are non-nuclear weapons states who rely on US extended deterrence. Yet, they have agency to make a positive impact on nuclear and proliferation risks as well as the security environment. The UK, although an extra-regional actor, can and should use its voice as a P5 member to contribute towards reducing nuclear risks in the Asia-Pacific. Regardless of nuclear status, policy-makers must carefully weigh the implications of their decisions for the nuclear non-proliferation regime and strive to uphold the NPT. Unrestrained nuclear proliferation across the Asia-Pacific would threaten the security of all.

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