

## APLN QUARTERLY NUCLEAR MEMO

### Issue 2 · April–June 2026

In alignment with APLN's 2026–2030 Research Strategy, the APLN Quarterly Nuclear Memo tracks, analyses and summarises nuclear developments shaping the Asia-Pacific security environment. Developments are classified according to four analytical categories: **Disruptive** (developments posing acute or immediate risks to the nuclear order and regional stability), **Stabilising** (steps that reduce risk or build confidence), **Worrisome** (trends that, if unchecked, could worsen the nuclear order), and **Dialogue-based** (activities that involve two or more interlocutors).

What stands out in the April–June 2026 quarter is not one particular crisis, but how many things have quietly moved in the wrong direction at once. As the table below shows, worrisome developments far outnumber stabilising ones — a gap that is difficult to look past.

#### DEVELOPMENTS AT A GLANCE

<b>DISRUPTIVE</b>	<ul style="list-style-type: none"> <li>• DPRK formally declares denuclearisation "Terminated Irreversibly" with tacit support from China and Russia</li> <li>• Continued attacks on nuclear facilities in Ukraine and West Asia</li> </ul>
<b>STABILISING</b>	<ul style="list-style-type: none"> <li>• US–Iran MOU provides tentative framework for resolving Iran's nuclear programme</li> <li>• Nuclear energy initiatives gain momentum in ASEAN countries</li> </ul>
<b>WORRISOME</b>	<ul style="list-style-type: none"> <li>• NPT Review Conference 2026 fails to produce consensus outcome</li> <li>• SIPRI Yearbook confirms first simultaneous arsenal expansion since the 1980s</li> <li>• DPRK continues rapid nuclear and missile advancements</li> <li>• Russia–DPRK formalise 2027–2031 military cooperation framework</li> </ul>
<b>DIALOGUE-BASED</b>	<ul style="list-style-type: none"> <li>• US–Iran negotiations: fragile success of diplomacy</li> <li>• NPT Review Conference as platform for multilateral engagement</li> </ul>

#### DISRUPTIVE NUCLEAR DEVELOPMENTS

##### **DPRK Formally Declares Denuclearisation as "Terminated Irreversibly"**

On 13 June, shortly after [the sixth US–ROK Nuclear Consultative Group \(NCG\) meeting](#), North Korea's Foreign Ministry [declared](#) that denuclearisation had become "an irreversibly finalised matter." Coming after China's omission of denuclearisation language and [Russia's deletion of North Korea clauses](#) at the NPT Review Conference, the statement was more than routine political signalling. It reinforces [Article 58 of Chapter 4](#) of the 2023 DPRK Constitution, which [formally enshrined](#) North Korea's status as a nuclear-armed state.

[Xi Jinping's visit to Pyongyang on 7–8 June 2026](#) set the immediate backdrop. The [joint communiqué made no reference](#) to denuclearisation of the Korean Peninsula, suggesting that Beijing is now prepared to tolerate a permanently nuclear-armed DPRK if it sustains pressure on US alliances. For Seoul and

Tokyo, the consequence is direct: the old assumption that China would act as at least a nominal restraint on Pyongyang now looks much weaker, just as North Korea's force becomes larger, more dispersed, and harder to plan against.

### **Continued Threats to Nuclear Facilities**

Conflict-related nuclear risks remained acute this quarter. In Ukraine, a drone struck the Central Spent Nuclear Fuel Storage Facility in the [Chornobyl exclusion zone](#) on 8 June, damaging the fuel reception building and the IAEA safeguards office, though radiation levels remained within normal limits. IAEA Director General Grossi told the [Board of Governors](#) that attacking a facility with large amounts of nuclear material “is extremely dangerous” and “must not happen.”

In West Asia, reported attacks on or near [Iran's Bushehr nuclear power plant](#), Israel's Dimona complex, and the UAE's Barakah facility point to a worrying normalisation of nuclear infrastructure as a target in active conflict. No radiological disaster has occurred, but the precedent is dangerous, especially for a region where new civil nuclear programmes are expanding.

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## **STABILISING NUCLEAR DEVELOPMENTS**

### **Tentative Promise of the US–Iran MOU**

The US–Iran memorandum of understanding announced on 16 June was the most important stabilising development of the quarter. If implemented, it could restore inspector access to Iranian nuclear facilities and create a pathway for dealing with highly enriched uranium stockpiles. Its value remains conditional: [IAEA Director General Grossi](#) has confirmed that the interim deal mandates inspector access, but Tehran continues to link key inspections to a final agreement and sanctions relief.

### **Nuclear Energy Initiatives in ASEAN**

Southeast Asian interest in nuclear energy also continued to grow. At the [ASEAN–Russia Commemorative Summit](#) in Kazan, several ASEAN states reaffirmed interest in civil nuclear cooperation with Russia. Indonesia appears furthest along, with [negotiations with Rosatom](#) over floating nuclear power plants, while the [Asia Nuclear Energy and SMR 2026 conference](#) in Singapore reflected growing commercial and regulatory interest. The opportunity is real, but so is the need to strengthen non-proliferation governance and the Bangkok Treaty framework.

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## **WORRISOME NUCLEAR DEVELOPMENTS**

### **Limited Success at the NPT Review Conference**

The 11th NPT Review Conference, held in New York from 27 April to 22 May under Vietnam's Đỗ Hùng Việt, [ended without a consensus final document](#), the third such failure after 2015 and 2022. The familiar fractures remained: no agreement on binding Article VI timelines, disagreement over how to acknowledge the TPNW, continued blockage on the Middle East WMD-Free Zone, and China's effort to bring Japan's Three Non-Nuclear Principles debate into the NPT setting.

The failure does not mean the NPT is collapsing. Its safeguards and non-proliferation functions remain operational. But for the Asia-Pacific, the result matters because it leaves several regional issues — DPRK pressure, AUKUS naval propulsion safeguards, the Bangkok Treaty Protocols, and Japan's nuclear principles debate — without meaningful multilateral progress.

### **SIPRI Yearbook 2026: Arsenal Modernisation Across All Nuclear-Armed States**

The [SIPRI Yearbook 2026](#), released on 8 June, shows that all nine nuclear-armed states are expanding or modernising their arsenals, a pattern not seen since the 1980s. For the Asia-Pacific, three developments stand out: China's arsenal has reached 620 warheads, with deployed warheads rising by 42 percent year-on-year; India is assessed to have deployed nuclear warheads for the first time as its SSBN force matures; and North Korea's assembled arsenal is estimated at around 60 warheads.

China's trajectory is especially significant. Its growing deployed force, continued silo construction in [Xinjiang and Gansu](#), and [US assessments](#) that it could approach 1,000 warheads by 2030 will affect extended deterrence planning for South Korea and Japan. The regional effect is not only quantitative; it is also doctrinal and operational.

Meanwhile, India's commissioning of [INS Aridhaman](#), its third SSBN, gives this trend a sharper South Asian dimension. The availability of three SSBNs is the basis for SIPRI's assessment that India has deployed nuclear warheads for the first time. This does not necessarily signal a doctrinal change, but it will add pressure on Pakistan's deterrence planning, particularly at sea.

### Unresolved Risk of Iran's Nuclear Breakout

The quarter was defined by the interplay of military escalation and diplomatic negotiation over Iran's nuclear programme. The central sticking point has been Iran's right to future enrichment and the fate of approximately 400 kilograms of 60%-enriched uranium. The US negotiating position required Iran to dismantle its three principal nuclear sites — Fordow, Natanz, and Isfahan — and transfer its remaining enriched uranium stockpile to US custody. Iran rejected that framework, with Foreign Minister Araghchi stating Tehran "can never accept zero enrichment" and that any successful negotiation must recognise enrichment inside Iran.

The Islamabad MOU establishes a 60-day negotiating window, paired with a temporary suspension of [Strait of Hormuz](#) closures that had become an acute energy-security problem for China, India, South Korea, and Japan. Iran's subsequent insistence on controlling vessel routing and imposing transit fees has since put even that provisional arrangement in doubt.

### DPRK Nuclear and Missile Capability Advances

North Korea's nuclear and missile advances continued beyond political signalling. On 14–15 April, IAEA Director General Rafael Grossi said in Seoul that North Korea was constructing a third uranium enrichment facility at Yongbyon, calling it a "very serious increase" in weapons production capacity. On 4 June, KCNA reported Kim Jong Un's inspection of a new nuclear materials production factory, where he claimed that weapons-grade material production had more than doubled over five years.

The strategic issue is no longer only warhead numbers. A more dispersed fissile-material production base is harder to target and harder to reverse. Pyongyang also conducted at least ten missile tests between January and early June, including systems that blur the line between conventional and nuclear-capable deployments during a crisis.

### DPRK Missile Tests: Selected Events, April - Jun 2026

Date	System	Significance
<a href="#">19 April</a>	Hwasong-11 Ra SRBM	Personally overseen by Kim Jong Un; part of ≥10 separate launches Jan–Jun 2026
<a href="#">26 May</a>	Modular launcher (HIMARS-type) + AI-guided tactical cruise missiles	Live-fire from multi-calibre modular platform; cruise missiles with AI terminal guidance, ~100km range; designed for border deployment; deliberately ambiguous between nuclear/conventional in crisis context
<a href="#">Late May</a>	Multiple cruise missile launches	Pattern of broad delivery-system testing; emphasis on operational readiness across platforms

Source: KCNA; Reuters; 38North; CSIS Missile Defense Project.

### Russia–DPRK Military Cooperation: The 2027–2031 Framework

Russia–DPRK military cooperation also became more institutionalised. On [26 April](#), Russian Defence Minister Andrey Belousov visited Pyongyang and confirmed plans for a 2027–2031 military cooperation

framework. Reports that roughly 16,000 North Korean personnel have served alongside Russian forces in Ukraine point to a relationship moving beyond wartime transaction.

South Korean intelligence has suggested that Russia may have transferred components linked to a North Korean nuclear submarine propulsion programme, but this remains uncorroborated and should be treated cautiously. The larger concern is the channel itself: with the [UN Panel of Experts effectively terminated by Russia's veto](#), sensitive cooperation between Moscow and Pyongyang is now harder to monitor.

## DIALOGUE-BASED NUCLEAR DEVELOPMENTS

### US–Iran MOU: Fragile Success of Diplomacy

On [16 June](#), the United States and Iran signed a Memorandum of Understanding in Geneva covering Iran’s commitment not to develop nuclear weapons, the reopening of the Strait of Hormuz, and a 60-day technical negotiation on enrichment and stockpile arrangements. Even if the nuclear track remains unresolved, the reopening of Hormuz brought immediate energy-security relief for China, India, South Korea, and Japan.

US officials initially described the framework as “[a very general document](#)”, and the [14-point text](#) showed that major issues were still open. Iranian officials continue to insist on a right to enrichment, making clear that the MOU creates space for diplomacy rather than settling the nuclear question.

## LOOKING AHEAD

The next quarter will be important for tracking whether the developments identified in this Memo remain contained or begin to harden into longer-term risks. The table below highlights the main issues to watch in Q3 2026 and the questions they raise for nuclear risk and regional stability.

### Key Developments to Monitor: Q3 2026

Watch Item	Why It Matters
<b>US–Iran 60-day technical negotiations</b>	Will the talks produce a clear timeline and scope for restoring IAEA inspection access to Iranian nuclear sites? Will the parties agree on how to handle Iran’s HEU stockpiles?
<b>Pakistan's doctrinal response to India's SSBN commissioning</b>	How will Pakistan respond to India’s maturing sea-based deterrent? Will it adjust doctrine, force posture, or pursue new sea-based capabilities of its own?
<b>US handling of denuclearisation framing for the Korean Peninsula</b>	How will Washington frame denuclearisation after Pyongyang’s latest declaration? What ambiguity, if any, will this create for extended deterrence messaging to South Korea and Japan?
<b>Russia–DPRK 2027–2031 military cooperation specifics</b>	What technologies, joint production arrangements, and training programmes will be included in this cooperation framework? Will any nuclear, missile, or submarine-related cooperation be evident?
<b>DPRK ICBM or SLBM testing</b>	Would further ICBM or SLBM tests signal operational readiness rather than continued development? What would this imply for regional threat perceptions?
<b>Signs of major-power dialogue on nuclear issues</b>	Will any US-China or US-Russia communication channels emerge on nuclear posture, crisis hotlines, or arms control? Even limited dialogue would be a stabilising signal.

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## ABOUT THIS PUBLICATION

This Memo was prepared by **Dr Manpreet Sethi**, Senior Research Adviser, Asia-Pacific Leadership Network (APLN), drawing on research and background inputs by **Hree P. Samudra**, Policy Fellow, APLN. Editorial review was provided by **Shatabhisha Shetty**, Executive Director, APLN. The Memo was designed and formatted by **Hree P. Samudra**.

The APLN Quarterly Nuclear Memo is a cross-cutting initiative of APLN's 2026–2030 Research Strategy, which organises its analytical work across four pillars:



*The APLN Quarterly Nuclear Memo tracks developments across all four pillars of APLN's 2026–2030 Research Strategy: Disruptive Technology and Nuclear Risks; Nuclear Diplomacy and Arms Control; Maritime and Nuclear Risk Reduction; and Sub-Regional & Cross-Regional Strategic Risks.*

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