

CHAPTER 8

QUESTIONING THE NUCLEAR UMBRELLA

Northeast Asia and Europe in a Trump 2.0 world

by
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Confidence in extended nuclear deterrence, the ultimate test of alliance credibility, is diminishing across Europe and Northeast Asia. Rising nuclear threats and the lowest levels of trust in US-allied relations in years are driving this shift. Under President Trump's second term, uncertainty has become a defining feature of alliance politics, making the old Cold War question – 'would Washington trade New York for Paris (or Tokyo)?' – no longer feel speculative.

As transatlantic and transpacific relations deteriorate, domestic proliferation options like France's *force de frappe* or even Japan's latent fuel cycle, once considered symbolic safety nets, are gaining renewed attention. These remain far from realistic substitutes, but their prominence risks making 'fallback' logic a primary organising feature of alliance dynamics, with lasting consequences for security relations. Europe, while not directly involved in Northeast Asian nuclear dynamics, could still play a stabilising

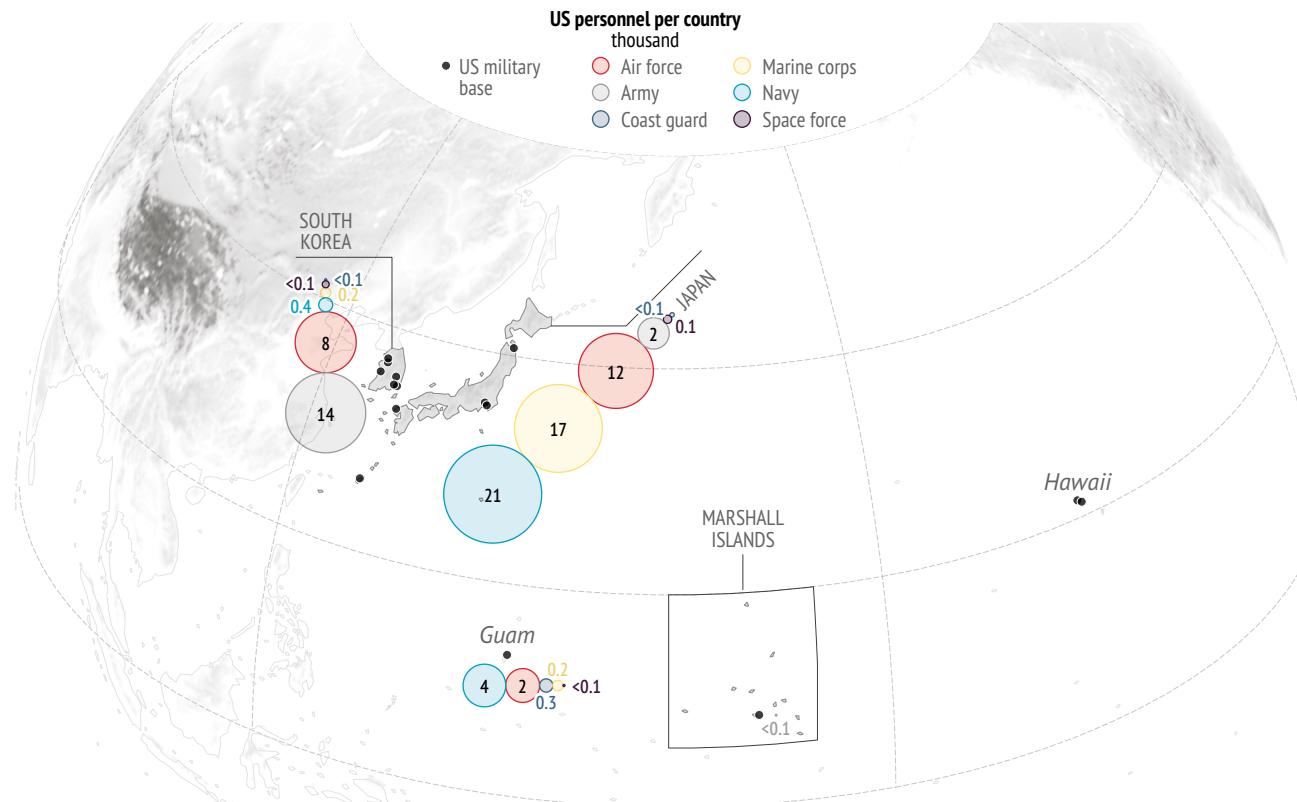
role in managing the fallout of Washington's unpredictability.

FROM CONVENTIONAL DETERRENCE TO NUCLEAR RISKS

Alliances have always tolerated friction. But what is currently unfolding is a deeper crisis of confidence in US deterrence guarantees. Vague and contradictory statements, like President Trump's comments on the questionability of defending Taiwan, have heightened concerns, casting doubt on the credibility of the US nuclear umbrella. This is happening in a global context where nuclear threats are more proximate and destabilising. Russia has openly invoked its arsenal in Ukraine; China is moving towards nearly

Is the umbrella still credible?

US military presence in Northeast Asia



Data: DoD Defense Manpower Data Center (DMDC), 2025; European Commission, GISCO, 2025

doubling its stockpile to over 1 000 warheads by 2030⁽¹⁾; North Korea's arsenal is becoming more sophisticated and explicitly targeted; and Iran's ambitions remain undeterred.

In Northeast Asia, particularly Japan and South Korea, where US security guarantees remain essential and nuclear weapons are prohibited, the debate is shifting, albeit tentatively. Statements like US Defense Secretary Pete Hegseth's call for Asian allies to match European

defence spending signal a change in US calculations, with ripple effects across the region.

Japan has long abided by non-nuclear norms. However, the late Prime Minister Shinzo Abe had a more open view towards nuclear deterrence, arguing that Japan 'should not treat as taboo discussions on the reality of how the world is kept safe'⁽²⁾. Other senior figures have echoed similar warnings about the 'nuclear alliance of China, Russia and North

(1) U.S. Department of Defense, 'Annual Report to Congress: Military and Security Developments Involving the People's Republic of China', 2024 (<https://media.defense.gov/2024/Dec/18/2003615520/-1/-1/0/MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2024.PDF>).

(2) 'Abe's remarks on Japan, nuclear weapons, and Taiwan', *The Japan Times*, 27 February 2022 (<https://www.japantimes.co.jp/news/2022/02/27/national/politics-diplomacy/shinzo-abe-japan-nuclear-weapons-taiwan/>).

Korea⁽³⁾. Yet the issue remains deeply controversial in much of Japan. A University of Tokyo 2025 survey⁽⁴⁾ found that over 60% of those polled supported continued adherence to Japan's current non-nuclear posture.

South Korea, for its part, displays an almost opposite dynamic. A 2024 Korea Institute for National Unification poll⁽⁵⁾ found that 66% of the public supported Seoul acquiring nuclear weapons, reflecting both alarm at North Korea and China's expanding nuclear arsenals, as well as diminishing trust in US deterrence guarantees. Yet follow-up surveys show this support dropping sharply once the fallout from diplomatic and economic sanctions is factored in. In policy circles too, enthusiasm is muted⁽⁶⁾,

In Europe, the impact of US unpredictability has been unmistakable. President Macron recently proposed 'extending' France's nuclear deterrent across Europe to complement NATO's nuclear-sharing arrangements and bolster Europe's nuclear defence posture⁽⁷⁾. While France would retain sole authority over their use, the proposal signals growing unease about US reliability. These doubts are amplified by debates over conventional burden-sharing and by Washington's increased expectations of allied contributions, exemplified by NATO's pledge to raise defence spending to 5% of GDP by

2035⁽⁸⁾. Although this pressure predates Trump, his second term brings uniquely punitive costs for non-compliance. One expert described this as a 'loosening of tight coupling'⁽⁹⁾. Not a break, but a recalibration which increasingly blurs the lines between conventional and nuclear deterrence.

STRATEGIC, STRUCTURAL AND SOCIETAL TENSIONS

These dynamics are not without consequence. As trust weakens, three interlinked tensions emerge: strategic, structural, and societal.

The first is strategic, marked by a risky feedback loop. When allies hedge by investing in conventional forces or nuclear capabilities, they create a paradox: from Washington's perspective, such moves can be interpreted as signs that allies are becoming self-sufficient, triggering an even swifter withdrawal of US commitments. While there is little precedent for US nuclear pullback, the 'psychology' of deterrence does not neatly separate nuclear and conventional guarantees. If allies see conventional commitments as

(3) Arms Control Association, 'Japan's new leader stirs debate on nuclear sharing', 1 November 2024, (<https://www.armscontrol.org/act/2024-11/news/japans-new-leader-stirs-debate-nuclear-sharing>).

(4) Tsuyoshi, G. et al. 'UTokyo ROLES Survey – Mar 2025', University of Tokyo, March 2025, (<https://roles.rcast.u-tokyo.ac.jp/uploads/publication/file/164/publication.pdf>).

(5) Korea Institute for National Unification, 'KINU'S Announcement of the Result of the 2024 KINU Unification Survey: North Korea's Two-State Claim/US Presidential Election Outlook and ROK-US Relations', 27 June 2024, (https://www.kinu.or.kr/eng/board/view.do?nav_code=eng1678858138&code=78h7R6ucKsuM&idx=24481)

(6) Cha, V., 'Breaking bad: Nuclear deterrence in East Asia,' Center for Strategic and International Studies, 29 April 2024 (https://csis-website-prod.s3.amazonaws.com/s3fs-public/2024-04/240429_Cha_Breaking_Bad.pdf?VersionId=Varqa7U3nomMidX555LpWcCWmLwFATi).

(7) Perot, E., 'Revisiting deterrence: Towards a French nuclear umbrella over Europe', Vrije Universiteit Brussel, 20 March 2025 (<https://csds.vub.be/publication/revisiting-deterrence-towards-a-french-nuclear-umbrella-over-europe/>).

(8) NATO, 'Defence expenditures and NATO's 5% commitment', 27 June 2025 (https://www.nato.int/cps/en/natohq/topics_49198.htm).

(9) Interview with a senior Indo-Pacific nuclear analyst, off the record, June 2025.

unreliable, that uncertainty could bleed into perceptions of the nuclear umbrella even if its withdrawal remains unlikely. From an adversary's viewpoint, these shifts could either signal fragmentation (weakening alliance credibility) or escalation (increasing the risk of a coercive response).

Second, the structural tension. Years of reliance on the US security umbrella have atrophied the domestic defence industrial bases of many allies, leaving them heavily dependent on US platforms⁽¹⁰⁾. Reconstituting these capabilities is a generational undertaking which will be neither quick

nor cheap. It is an overhaul that demands alignment across budgetary, technological, and personnel pipelines, as illustrated by Europe's efforts to unlock €150 billion for defence investment⁽¹¹⁾. Similar complexities appear in Northeast Asia. Japan possesses advanced enrichment capabilities but lacks integrated delivery systems and faces constraints stemming from its pacifist constitution. South Korea, by contrast, has modern delivery systems and conventional force planning but lacks fissile material. Neither possesses plug-and-play nuclear deterrent capability⁽¹²⁾, underscoring their continued dependence on US guarantees.

Third, the societal tension. In both Europe and Northeast Asia, attitudes toward nuclear weapons remains one of the least understood dimensions of national security. Societal attitudes fluctuate

depending on how the topic is framed, threat proximity, and the domestic political climate. South Korean support for pro-nuclear weapons appears strong in polls until respondents consider the potential consequences. In Japan, elite voices may question non-nuclear principles, but public opposition remains a significant constraint, rooted in the legacies of Hiroshima and Nagasaki. Europe faces similar frictions. In Belgium, for instance, protests have repeatedly targeted US nuclear weapons stored at the Kleine Brogel airbase⁽¹³⁾. Such incidents expose how elastic public opinion can be – a factor that adversaries can, and do, exploit and that policymakers must anticipate.

Relationships once grounded in shared understanding are increasingly shaped by diminishing trust.

Together these tensions reveal a deeper shift in collective defence dynamics. Relationships once grounded in shared understanding are increasingly shaped by diminishing trust. In a world trending toward transactionalism, this fragmentation is easily exploited. Given ambiguous US signalling, preserving enough trust to ensure that allies will respond collectively, even amid uncertainty, is critical. If allies begin defaulting to individualised fallback measures, collective deterrence would not simply weaken, it could unravel. History offers precedent: after the Suez Crisis, France opted for nuclear independence and withdrew from NATO's integrated command for decades. That choice stemmed not from a lack of capability, but from a fundamental breakdown of trust.

(10) Vdovychenko, A., 'Can Europe trust U.S. weapons?', Center for European Policy Analysis, 21 March 2025 (<https://cepa.org/article/can-europe-trust-us-weapons/>).

(11) European Commission, Press release, 'EU Member States endorse €150 billion SAFE defence loan instrument to boost European defence capabilities', 27 May 2025 (https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1340).

(12) Interview with a senior Indo-Pacific nuclear analyst, off the record, June 2025.

(13) Nelson, A., 'Green MEPs occupy Belgian F-16 runway in anti-nuclear protest', *The Guardian*, 20 February 2019 (<https://www.theguardian.com/politics/2019/feb/20/green-meps-occupy-belgian-f-16-runway-in-anti-nuclear-protest>).

KEEPING THE EURO-ATLANTIC- INDO-PACIFIC CONNECTION OPEN

The challenge then is strengthening trust between allies to ensure that fallback measures do not harden into default strategy. While Europe is not a nuclear guarantor in the Indo-Pacific, it still has a role to play even if this runs counter to the current US administration's preference that Europe focus primarily on its immediate Eastern flank. Yet in the absence of confidence-building measures, alliance dynamics in Northeast Asia may shift in more destabilising ways.

One option is to adapt the NATO-IP4 mechanism for nuclear signalling. Though not a formal alliance, the IP4 (Japan, South Korea, Australia and New Zealand) is a values-aligned grouping facing similar questions about US reliability. Any such initiative would need careful framing to avoid perceptions of Indo-Pacific 'expansionism', emphasising crisis management and early warning mechanisms rather than force projection. A voluntary EU-IP4 grouping could begin with a joint audit of nuclear-relevant capabilities. This could echo Quad members' efforts to map sectoral vulnerabilities for contingency planning⁽¹⁴⁾, offering a tested model in a politically charged environment. The point is not to promote proliferation or expansionism, but rather to demonstrate cross-theatre cohesion and signal joint planning in the event of a crisis.

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Scenario-based stress-testing is another essential tool. Allies need clarity on roles and expectations, especially when assumptions about thresholds or sequencing go unspoken. This is particularly relevant in flashpoints like the Taiwan Strait or the Korean Peninsula, where ambiguity could deepen miscalculation. There is also growing concern that adversaries may exploit a crisis in one region to create pressure in another – a risk often highlighted in scenarios involving Taiwan. This potential for cross-theatre opportunism may constrain US capacity to respond and complicate allied coordination efforts unless anticipated. Targeted simulations could help align expectations in advance, clarifying who decides, who acts, and how coordination across allies unfolds.

Finally, addressing public (mis)understanding of nuclear risk is essential. Just as climate sustainability has moved from a niche concern to a mainstream priority, so too must nuclear risk awareness broaden beyond specialist circles. The objective is not to forge uniform societal consensus, but to establish a more informed foundation for public debate. Tailored educational modules and interactive platforms could be introduced in public forums and media to demystify deterrence logic, for example. An informed public is less vulnerable to panic-driven populism or complacency and better equipped to support nuanced nuclear policy development.

Aligning nuclear signalling, structural clarity and civic awareness offers one way to prevent fallback logic from hardening into doctrine. The goal is to stabilise trust between allies and project a unified

(14) Lee, S., 'Prospects and Limitations for a Quad Plus Europe,' Swedish Institute of International Affairs, February 2023 (<https://www.ui.se/globalassets/butiken/ui-brief/2023/ui-brief-no.-2-2023.pdf>).

front at the nuclear threshold. The global consensus against nuclear use, however frayed, remains one of the few enduring constraints in an increasingly volatile geopolitical environment. That consensus was built not on idealism, but on the recognition of mutual destruction and irreversible cost. Such restraint endures only if reinforced and cannot be taken for granted.