

(No) Second Sun over the Yalu?: Why North Korea Will Not Renounce Its Nuclear Arsenal

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1. Thirty Years of Diplomacy in the Shadow of North Korea's Nuclear Weapons

In February 2025, U.S. Secretary of State Marco Rubio reaffirmed that Washington continues to seek the complete nuclear disarmament of the Korean Peninsula. His remarks fueled speculation that the United States might resume talks with North Korea.¹ After all, during Donald Trump's first presidential term, Washington and Pyongyang held three meetings between June 2018 and June 2019, each involving the North Korean leader, Kim Jong-un. These encounters extended a long record of negotiations that the United States had initiated in 1994 with the aim of achieving full denuclearization of the peninsula.² Yet North Korea's progressively expanding arsenal demonstrates that this objective has remained out of reach. This essay adopts a neorealist perspective to explain why complete nuclear disarmament is not a viable option for North Korea. In sum, Pyongyang views its nuclear capabilities as essential for preserving regime survival, strengthening its bargaining leverage, and ensuring treatment on equal footing within the international system.

2. Nuclear Weapons in Kenneth N. Waltz's Defensive Neorealism

Within the anarchic structure of the international system, states, according to defensive neorealist Kenneth N. Waltz, may draw on two principal survival-oriented strategies by their own means. First, they can build conventional defenses. These capabilities do not need to function as purely defensive instruments; rather, they need to ensure that any opposing attack fails. Yet even if such an attack collapses, the aggressor usually risks only the loss of its own deployed forces—not the destruction of

¹ Kim, Tong-Hyung: *North Korea slams US and Asian rivals for pursuing 'absurd' plans to denuclearize North*. In: Reuters, February 18th, 2025, accessed via LexisNexis.

² Manyin, Mark E.; Nikitin, Mary Beth D.: *Nuclear Negotiations with North Korea* (Washington, DC, 2023), 1–2.

its state itself.³ Second, and in contrast, states can pursue a deterrence strategy. The success of this strategy depends heavily on a credible second-strike capability. Waltz captures the message that such a capability sends to any potential attacker in a succinct and vivid way: “Although we are defenseless, if you attack we may punish you to an extent that more than cancels your gains.”⁴ When an aggressor must assume that a strike will provoke its own annihilation, Waltz argues that nuclear deterrence becomes the most effective means by which a state can safeguard its survival.⁵

3. Pyongyang’s Nuclear Ambitions

Pyongyang has also opted for nuclear deterrence. Estimates from 2024 suggest that North Korea now possesses roughly 50 nuclear weapons, and its stock of fissile material could support the production of about 40 additional warheads.⁶ These figures, however, come with significant uncertainty. The deployment of delivery systems appears far clearer. North Korea primarily relies on land-based ballistic missiles, aiming to extend their range in order to provide a credible and enduring deterrent against the United States. With fewer than twenty intercontinental ballistic missiles, the regime’s ability to threaten the North American mainland remains limited, whereas U.S. bases across the Indo-Pacific already fall within reach.⁷ At the same time, Pyongyang continues to develop sea-based delivery systems. However, the country faces a major constraint: at present, only two submarines are capable of launching ballistic or cruise missiles.⁸ Given the small number of both land- and sea-based nuclear assets, Pyongyang likely doubts that its arsenal could survive a potential U.S. first strike. Based on Waltz’s assessment of states as security-maximizing actors, North Korea will therefore feel compelled to pursue a genuine second-strike capability by expanding its nuclear arsenal and sufficiently dispersing the corresponding delivery systems across the country and the surrounding waters.

³ Waltz, Kenneth N.: *More May Be Better*. In: *The Spread of Nuclear Weapons: A Debate Renewed*. 2nd rev. ed., by Sagan, Scott D.; Waltz, Kenneth N. (New York – London 2003 [1995]), 5–7.

⁴ Ibid., 5.

⁵ Ibid., 25–26.

⁶ Kristensen, Hans M.; et al.: *North Korean nuclear weapons, 2024*. In: *Bulletin of the Atomic Scientists*, Vol. 80, No. 4 (2024), 251.

⁷ Ibid. See also International Institute for Strategic Studies: *The Military Balance* (London 2025), 268.

⁸ Kristensen et al. (2024), 264–65.

4. Reasons Against Denuclearization

Life Insurance: At first glance, North Korea's nuclear ambitions may appear puzzling, given the scale of its armed forces. The country fields roughly 1,280,000 active personnel and about 600,000 reservists, and it can mobilize nearly 6,000,000 paramilitary members—though the latter possess limited combat value.⁹ Yet the United States has repeatedly demonstrated that its network-centric warfare enables it to defeat conventionally armed state adversaries, even when they hold numerical advantages on the battlefield. Pyongyang, therefore, cannot rely on its conventional defenses to deter the United States without nuclear armament. From a neorealist viewpoint, without the risk of North Korean nuclear retaliation, Washington might plausibly initiate aggression since it would risk only the destruction of the deployed forces on the Peninsula—not necessarily the nuclear devastation of the U.S. In such a scenario, North Korea's territorial integrity would hinge primarily on Washington's calculation of potential costs. Given the anarchic structure of the international system, only military capabilities—not international law or political assurances—offer viable protection against existential threats. The United States and Russia have shown repeatedly that they regard international law as a removable obstacle when conflicting with their strategic aims, as seen in Iraq in 2003 and Ukraine since 2022. From a neorealist perspective, the North Korean leadership would act irresponsibly if it accepted full denuclearization in exchange for uncertain security guarantees. Regular changes of administration in Washington—and the policy reversals that often follow—only deepen this strategic uncertainty.

Bargaining Leverage: Regardless of whether it genuinely considers disarmament, Pyongyang can leverage its nuclear arsenal to extract concessions. The United States and its allies perceive North Korea's expanding capabilities as a growing threat and thus view diplomacy as a potential route toward denuclearization. Pyongyang, however, does not depend on such talks; decades of harsh sanctions have not substantially destabilized the regime. This incentive asymmetry in the negotiations explains why preconditions for past talks have often favored the North Korean side. A prominent example was President Trump's willingness at the 2018 Singapore Summit to suspend annual military exercises with South Korea as a precondition for continued negotiations. Kim, by contrast, offered no significant concessions beyond vague statements of intent.¹⁰ Therefore, complete disarmament remains distant, even if talks resume.

⁹ International Institute for Strategic Studies (2025), 267.

¹⁰ Manyin/Nikitin (2023), 14.

Neorealism suggests that this pattern will persist until Pyongyang believes it has secured a reliable second-strike capability and thus its survival in the international system. Only once it reaches that threshold might the regime accept partial reductions of delivery systems or warheads—yet even then, only to the extent that such reductions do not endanger its ability to retaliate after the first strike.

Treatment on Equal Footing within the International System: Even without a full second-strike capability, North Korea's nuclear arsenal forces other states to treat Pyongyang as a negotiation partner on equal footing. The 2018 Singapore Summit symbolized this evolution, marking the first direct meeting between a North Korean leader and a U.S. president.¹¹ This development stemmed partly from the failure of nonmilitary measures such as sanctions, which had limited effect due to Chinese and Russian willingness to cooperate with Pyongyang. It also reflected Washington's lack of political will to enforce a hypothetical disarmament ultimatum militarily—especially given the threat of massive nuclear devastation in South Korea in case of a failed decapitation strike against Pyongyang's nuclear arsenal. Therefore, the United States cannot treat North Korea as a subordinate actor to whom it can unilaterally dictate demands. This dynamic aligns with Waltz's arguments about the limits of coercion against nuclear-armed states: "The unconditional surrender of a nuclear nation cannot be demanded."¹²

5. Conclusion

In sum, North Korea continues to pursue a credible second-strike capability as the foundation of its long-term survival strategy. Defensive neorealism—which has offered a coherent explanation of Pyongyang's decades-long nuclear buildup—provides no reason to expect the regime to accept the complete dismantlement of its arsenal. Its distrust of Washington remains profound, while its confidence in its own conventional forces remains limited. Because Kim Jong-un seeks an irreversible path toward further nuclear development and uses negotiations chiefly to extract unilateral concessions, the fundamental value of such talks must be called into question. For South Korea, these dynamics raise a pivotal question: Can it still rely on the alliance with the United States to guarantee its survival? If Seoul, especially under the shadow of Trump's second presidency, ultimately answers this question in the negative, the result could be a decisive push toward its own nuclear armament.

¹¹ Ibid., 13.

¹² Waltz (2003), 29.

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