

# PSIR & GS-2

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# The looming nuclear crisis in the Gulf

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## The Looming Nuclear Crisis in the Gulf

*Overcoming the Enrichment Dilemma in the Saudi Deal*

YOEL GUZANSKY

August 3, 2026



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[More by Yoel Guzansky →](#)

**Context** The question behind US-Saudi civil nuclear agreement announced on 22 July is no longer whether Saudi Arabia goes nuclear but on whose terms.

## Facts

- US-Saudi nuclear agreement : 30 year deal that would let U.S. companies build the Kingdom's nuclear infrastructure but allow Saudi Arabia to enrich uranium on its own soil.
- Weaken the U.S. "gold standard" : Saudi does not require the IAEA Additional Protocol.
- Arms-race triggers : MBS's 2018 "if Iran does, we will" and the September 2025 Saudi-Pakistan defence pact.

## Analytical Crux

The Saudi debate has shifted from "will they enrich" to "under whose control", which means a flat US "no" is neither credible nor an offer. Saudi Arabia treats the full fuel cycle as sovereignty & status & not merely energy. It resists multilateral control and one MBS-style calculation keeps a regional arms race a single crisis away. The central question is no longer whether Saudi Arabia will advance along the nuclear path but how its pursuit of nuclear power can be managed without igniting a nuclear arms race.

## Verbatim Quotes

"Reframe enrichment not as a national right but as a regional, internationally controlled service that would transform nuclear enrichment from a concession into a conditional reward."

# Wolf world or a multipolar world?

**SOUTH ASIA MONITOR**  
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## Wolf World or a Multipolar World? How Major Powers Exercise Power Will Determine Emerging International Order

The growing role of middle powers adds another layer of complexity. Yet the term itself remains imprecise. Not every country outside the United States and China qualifies as a middle power, and many reject the label altogether. India, for example, increasingly sees itself as a leading power pursuing strategic autonomy rather than as a middle power seeking alignment with one bloc or another.



By Col KL Viswanathan (Retd.) | Jul 26, 2026

### Context

Whether weakening post-Cold War order settles into a stable multipolar balance or slides into a "wolf world" where might makes right.

### Facts

- Liberal international order built after Second World War on 3 pillars: ideological, economic & institutional relying on the UN, World Bank, IMF & WTO.
- Strategic overstretch: Washington faces 3 theatres at once; Russia in Europe, Iran in the Middle East, China in East Asia.

## Analytical Crux

There is a difference between the decline of US dominance from the decline of US power. The US remains the single most powerful state but what has changed is its relative dominance. The world is multipolar in energy but unipolar in finance & the label works better sector by sector than as a single global verdict. It is the model multi-aligner (Quad, BRICS & the SCO at the same time). The outcome will depend less on the number of major powers than on the manner in which they exercise power.

## Verbatim Quotes

“ Multipolarity describes the distribution of power ; multi-alignment as mechanism through which competing forces remain in equilibrium ; a wolf world as the failure of that mechanism , where power operates without restraint.”

# NATO enters a new strategic era of transformation

## NATO enters a new strategic era of transformation

For the first time since the creation of the North Atlantic Treaty Organization (NATO) in 1949, Washington is asking Europe not merely to spend more on defence but also to assume primary responsibility for its own security. This marks a fundamental shift in the transatlantic compact and signals the emergence of a new phase in the Alliance's evolution. The question is no longer whether NATO will endure, but how it is adapting to a changing strategic landscape.

### America's shift

The National Security Strategy of the United States of America (November 2025) maintained NATO as America's principal transatlantic alliance while signalling a significant shift in Washington's expectations of European allies, particularly regarding burden-sharing and collective defence responsibilities. It argued that the era of the U.S. serving as Europe's primary security guarantor was drawing to a close and that prosperous European allies must shoulder greater responsibility for defending their own continent. While endorsing NATO's commitment to increase defence spending to 5% of GDP as the new benchmark for burden sharing, the strategy envisaged the U.S. remaining the Alliance's strategic enabler, nuclear guarantor and political convener rather than its sole military backbone. The objective is a stronger, more self-reliant Europe that allows Washington to devote greater strategic attention to the Indo-Pacific.

This rebalancing is already evident. Following Russia's invasion of Ukraine in 2022, U.S. troop strength in Europe rose to around 1,00,000 personnel. Since then, Washington has gradually reversed that surge. During 2025-26, it withdrew around 5,000 troops from Germany, cancelled the planned deployment of 4,000 troops to Poland, and reduced Brigade Combat Teams in Europe from four to three, bringing the U.S. military presence in Europe down to approximately 75,000-80,000 troops – close to pre-Ukraine war levels. The 36th NATO Summit in Ankara in July 2026 reinforced this transition. While reaffirming the Alliance's commitment to Article 5, members pledged €70 billion in military assistance for Ukraine in 2026, committed to sustaining comparable support in 2027, endorsed European-led development of long-range



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NATO's European shift offers India new strategic and defence opportunities

precision strike capabilities and accelerated efforts to strengthen NATO's defence industrial base. The underlying message was unmistakable: Europe must assume greater responsibility for its conventional defence as the U.S. increasingly prioritises the Indo-Pacific.

Lord Ismay, NATO's first Secretary General, famously described the Alliance's original purpose as "to keep the Russians out, the Americans in, and the Germans down". While that dictum captured the strategic logic of the Cold War, NATO today has entered a distinctly different phase that may be summed up as keeping Russia deterred, America engaged and Europe prepared.

### NATO's evolution over time

The Alliance's evolution can be viewed in three phases. NATO 1.0 (1949-1991) relied overwhelmingly on American military and nuclear power to deter Soviet aggression and preserve transatlantic unity. NATO 2.0 (1991-2022) followed the collapse of the Soviet Union, expanding eastwards, incorporating former Warsaw Pact members and undertaking operations in the Balkans and Afghanistan. Yet, this period also witnessed declining European defence expenditure and growing dependence on the U.S. for intelligence, logistics, strategic mobility and high-end military capabilities, making burden sharing an increasingly contentious issue.

The Russian invasion of Ukraine has ushered in NATO's third phase, a more balanced transatlantic partnership in which Europe assumes primary responsibility for conventional defence while the U.S. continues to provide strategic enablers such as nuclear deterrence, intelligence, long-range precision strike capabilities and global power projection. This is less a story of American disengagement than one of strategic redistribution.

The scale of Europe's response was evident at the 2025 Hague Summit, where NATO members committed to increasing core defence spending to at least 3.5% of GDP by 2035, with progress to be reviewed in 2029. Germany has doubled defence expenditure since 2023 and aims to reach the same target by 2029 while rebuilding military capability to deter Russia. Moscow, meanwhile, has reorganised its western military

posture with new headquarters, formations and bases facing NATO.

The more difficult challenge, however, is not spending but replacing the American military ecosystem. Even as European armies become stronger, they continue to depend heavily on the U.S. for intelligence, surveillance, satellite support, command and control systems, strategic airlift, missile defence, long-range precision strike capabilities and, above all, the nuclear umbrella. Washington's reduction of rapid reaction assets, including bombers, fighter aircraft, air refuelling tankers, warships, aircraft carriers and attack submarines, together with the deferred deployment of Tomahawk cruise missiles to Germany, illustrates the extent of that dependence. Europe's central dilemma is therefore not simply building larger armed forces but developing the integrated capabilities that have long underpinned NATO's effectiveness. As Poland's Foreign Minister recently observed, Europe does not need to match American military power; it simply needs to be stronger than Russia.

### New Delhi and the rebalance

For India, NATO's transformation is less about Europe than about the redistribution of American strategic attention. A Europe capable of assuming greater responsibility for its own security would enable Washington to devote more diplomatic attention, military resources and strategic investments to the Indo-Pacific, reinforcing the regional balance amid China's growing assertiveness. At the same time, a more capable Europe could emerge as an important partner for India in defence manufacturing, advanced technologies, artificial intelligence, cybersecurity, semiconductors and space.

New Delhi should therefore view these changes through the prism of strategic opportunity rather than alliance politics. Closer cooperation with both the U.S. and Europe can complement, not compromise, India's long-standing commitment to strategic autonomy. If navigated prudently, NATO's new strategic model can expand India's defence industrial partnerships, accelerate technological modernisation and strengthen its position as a leading power in an increasingly multipolar world.

## Context

US asks Europe to take primary responsibility for its own security while U.S. steps back into the role of strategic enabler & pivots to the Indo-Pacific.

## Facts

■ NATO 1.0 (1949-1991): US-led Soviet deterrence ;  
NATO 2.0 (1991-2022): eastward expansion & falling European spending ; NATO 3.0 (post-2022): Europe leads conventional defence.

■ The burden sharing benchmark is 5% of GDP: U.S. to remain Alliance's "strategic enabler, nuclear guarantor and political convener" and not military backbone.

## Analytical Crux

The question is no longer whether NATO will endure, but how it is adapting to a changing strategic landscape. The US is not walking out on Europe but it is re-pricing the deal i.e. Europe takes over conventional defence while US keeps the capabilities only it supplies. The shift is already material i.e. troop cuts, a cancelled Poland deployment & deferred Tomahawks. Europe's true bottleneck is the US ecosystem it cannot replicate & not the spending figure, U.S. pivot to the Indo-Pacific plus a more capable Europe is an opening for India in defence and technology. Therefore, closer cooperation with both the U.S. & Europe can complement, not compromise, India's long-standing commitment to strategic autonomy.

## Verbatim Quotes

"Today NATO's purpose is summed up as keeping Russia deterred, US engaged & Europe prepared."

- **PSIR 2025, Paper II:** "India maintains strong ties with countries that will assure a free and open Indo-Pacific and guarantee greater connectivity with rest of the world. Analyze."
- **PSIR 2024, Paper II:** "Critically examine India's persistent refusal to sign the nuclear non-proliferation treaty (NPT) despite being recognized as a de facto nuclear power."
- **PSIR 2024, Paper II:** "The changing global order and ongoing regional conflicts, with the global powers taking sides, have jeopardised the progress made towards disarmament in the past. Comment."
- **PSIR 2024, Paper II:** "Do you agree with the view that the USA uses NATO as a traditional tool of strategy to perpetuate its hegemony in the world?"
- **PSIR 2023, Paper II:** "Discuss the various constraints on American hegemony today. Which of these are likely to grow?"
- **GS 2023, PAPER II:** "'The expansion and strengthening of NATO and a stronger US-Europe strategic partnership works well in India.' What is your opinion about this statement? Give reasons and examples to support your answer."



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