

November 2024

Move Past the Nuclear Impasse on the Korean Peninsula

The Trump administration should define new goals for North Korea and manage the alliance with South Korea

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TOPLINE

The incoming Trump administration will face an emboldened North Korea with vastly different terms for nuclear negotiations, and a South Korea harboring deep concerns about US views on alliances and North Korea. Considering the significantly changed strategic environment in the region, the new administration is advised to reassess what the United States ultimately wants from its relationship with Pyongyang beyond denuclearization and to balance those goals with its defense commitments to South Korea, coordinating any new approach closely with Seoul.

THE PROBLEM

President-elect Trump will inherit a vastly different strategic environment on and around the Korean Peninsula than what he dealt with during his first term. The deepening of US-China strategic competition, Russia's invasion of Ukraine and championing of a multipolar system, and Global South countries' growing resistance to the West are reshaping the global order. In Northeast Asia, while not quite a Cold War 2.0, security blocs are taking hold, with the United States, South Korea, and Japan strengthening one bloc, and North Korea, China, and Russia increasingly forming the other. Given the significant advancements North Korea has made in its nuclear and missile programs and its recalibration of foreign and nuclear policies, this blocification can only be expected to further embolden Kim Jong Un over where he stood when Trump left office four years ago.

In South Korea, the “nuclear debate” – discourse over whether Seoul should acquire some form of nuclear capability – has temporarily subsided but is likely to resurface as the security situation becomes more tenuous and anxieties grow over a second Trump administration’s approach to alliances. All this comes as North Korea pushes a new two Koreas policy that is already starting to challenge the status quo on the Korean Peninsula.

ESSENTIAL CONTEXT

There are three key challenges facing the incoming Trump administration in connection to the Korean Peninsula:

Great-power competition and hardening of security blocs in Northeast Asia: The intensifying great-power competition is fueling the formation of opposing security blocs in the region.

While China, North Korea, and Russia may not share the same worldview as a whole, their concerns about a growing US presence in Northeast Asia and its deepening security cooperation with South Korea and Japan, both bilateral and trilateral, have become increasingly aligned in recent years. In addition to growing threats of Chinese and North Korean nuclear expansion, both countries are providing support to Russia for its war in Ukraine. The North Korea-Russia Treaty on Comprehensive Strategic Partnership, signed in June 2024, includes provisions on military cooperation and mutual defense commitments. The impact of this upgrade in bilateral relations has already been felt, as upwards of 10,000 North Korean troops reportedly have joined Russia’s warfighting efforts. Questions loom about what Russia is providing North Korea in return, and what Moscow’s role might be in future conflicts on the Korean Peninsula.

There is no formal trilateral cooperation among these three nations yet – more so triangular bilateral alignments. However, given the direction of global security trends, there is the growing potential for these partnerships to move in the direction of trilateral cooperation. It is important to note that great-power competition and the opportunities Kim Jong Un likely sees in the new external environment have further reduced the strategic value of the United States for North Korea. The new administration should take this into account when conducting its policy review.

Unlike the loose China-North Korea-Russia bloc, US-South Korea-Japan trilateral security cooperation has reached new heights in recent years. This is exemplified by the three countries’ efforts to institutionalize security cooperation. It should be noted that the South Korean Yoon Suk Yeol government’s policy toward the United States has been clear since its inauguration in May 2022. It shifted away from the preceding Moon Jae-in government’s policy of “strategic ambiguity” vis-a-vis Washington and Beijing toward strategic clarity, aligning Seoul firmly with the United States and its values-based alliances. The launch of the US-South Korea Nuclear Consultative Group (NCG) and

South Korea's adoption of its own Indo-Pacific strategy marked new milestones in the alliance. Strong US-South Korea-Japan trilateral security cooperation, while necessary and a positive development for regional and global security, is nonetheless seen by other key stakeholders – namely China, North Korea, and Russia – as a growing threat to the balance of power in the region. Managing this perception will be key to preventing unnecessary escalation of tensions.

Shifting nuclear attitudes in both Koreas: The incoming Trump administration will face a fundamentally different North Korean nuclear and foreign policy context than what existed four years ago. Furthermore, there is potential for South Korea's "nuclear debate" to resurface if its confidence in the alliance with the United States wanes.

North Korea has fundamentally shifted its foreign policy following the collapse of the 2019 Hanoi summit, renouncing its 30-year policy of normalizing relations with the United States through denuclearization and realigning with China and Russia. In September 2022, Kim said there would never be "our abandonment of the nuclear weapons or denuclearization first," and that the country had "drawn the line of no retreat regarding our nuclear weapons." This appeared to be a complete reversal of Pyongyang's policy toward the United States that was premised on working toward denuclearization to gain Washington's favor. In line with the changes in its foreign policy, North Korea in 2023 codified its policy of continued nuclear development into the constitution, legally ensuring the irreversibility of North Korea's status as a "nuclear nation."

South Korea's long-standing debate over whether it should pursue its own nuclear deterrent intensified after President Yoon's comments in early 2023 that Seoul would consider seeking nuclear options if North Korea's nuclear threats grew. The public debate has quieted since the two countries announced the Washington Declaration in April 2023, which reaffirmed US commitment to extended deterrence and launched the bilateral NCG to integrate Seoul into US planning for contingencies on the Korean Peninsula that might involve nuclear use. However, President-elect Trump's return to the White House may once again raise questions in South Korea about the credibility of the United States as an ally. During his first term, Trump unilaterally canceled US-South Korea joint military drills, allegedly told his aides that he wanted a complete withdrawal of US forces from South Korea, and was seen by many Koreans as demanding exorbitant increases for defense cost-sharing. Any repeat of these types of antagonisms in US-ROK relations is likely to trigger very different responses from Seoul a second time around. Additionally, any sign that the second Trump administration would accept North Korea as a nuclear state would further fuel South Korea's calculation about its own nuclear future. Public surveys have already consistently shown growing support in South Korea for its own nuclear capability.

Potential change in the status quo on the Korean Peninsula. The extent to which Kim Jong Un means to push a permanent two-state division on the Korean Peninsula remains unknown. However, its implications could have far-reaching consequences on multiple fronts, from new territorial disputes and nullification of the Armistice Agreement to tensions over a potentially one-sided vision of unification.

In December 2023, Kim Jong Un officially renounced the country's decades-old policy of peaceful unification. The following month, he declared South Korea the "primary enemy state" and called for defining North Korea's territory in its constitution and completely severing the inter-Korean railways. North Korea appears to have made relevant constitutional revisions in October 2024, but it has yet to detail them in either internal or externally focused state media. All we know is that, as a result of Kim's new policy, North Korea has been removing all unification-related language and signs from print and broadcast material and, in the wake of the constitutional revisions, blasted sections of inter-Korean roads and railways.

Pyongyang's constitutional revisions and rollout of these amendments could result in serious challenges to the status quo of the Korean Peninsula. Depending on how North Korea defines its territory in the constitution, it could also have major consequences for the Armistice Agreement, which defines North and South Korean territories and the maintenance of boundaries and buffer zones, and legacy institutions, such as the United Nations Command and the Neutral Nations Supervisory Commission. Tensions could escalate between the two Koreas – for example, if North Korea asserts rights to a part of South Korean territory or territory under the control of the UN Command, or even challenges the persistence of the demilitarized zone.

Despite North Korea's new two Koreas policy, President Yoon in his Liberation Day speech in August 2024 reaffirmed South Korea's commitment to unification. This discrepancy about the future end state of the Korean Peninsula could cause tensions in future inter-Korean issues in ways that force the US to choose sides.

POLICY RECOMMENDATIONS

The deteriorating security situation on and around the Korean Peninsula calls for change in current US policy toward the two Koreas. To that end, we propose the following three steps.

Define new, realistic goals for North Korea beyond denuclearization. The incoming Trump administration should take the lead in defining new, feasible goals for North Korea. US policy toward North Korea for the past three decades has centered on denuclearization. Notably, however, the joint communique of the 2024 US-South Korea Security Consultative Meeting (SCM) omitted "denuclearization" for the first time in nine years. This suggests the two allies may not view North Korea's denuclearization as

a realistic policy goal up-front, recognizing a need to be flexible, while still strengthening deterrence.

What has been missing from the policy review process in the past is a real consideration of what the United States ultimately wants from its relationship with North Korea. Re-engaging Pyongyang will not be as simple as reupping proposals from the Hanoi Summit. A new path is needed but to what end is still an open question. Are there goals beyond denuclearization for dealing with North Korea? How can those be balanced with competing interests in South Korea? While strong deterrence against North Korea's growing WMD capabilities is essential for the protection of the United States and its allies, it is not a solution in and of itself. At times, an overreliance on deterrence can also work at odds with diplomatic efforts, especially when North Korea and its strategic partners may view US and allied deterrence measures as a threat to the region. If denuclearization remains part of the equation, continuing to lead with that is only setting the new administration up for failure, given Pyongyang's current stance on its nuclear program and the significantly changed geopolitical landscape in Northeast Asia.

Reassure and coordinate with South Korea. Alliance reassurance and policy coordination will be crucial, regardless of what the administration decides. As outlined above, there is already high anxiety in South Korea over the second Trump term regarding key aspects of alliance cooperation, and the real possibility of discord between the two countries over North Korea policy. The new administration should consult with Seoul at every step as it charts its new course on North Korea, as difficult as some of those discussions are likely to be, to avoid uncoordinated or discordant actions that will ultimately undermine either country's efforts. This will be incredibly important for demonstrating that the United States values alliances even while exercising flexibility toward North Korea.

Demonstrate political leadership, despite risks and criticism. The new administration should exercise political leadership, knowing that changing a decades-old policy on a polarizing topic such as North Korea may be unpopular at home and among allies and partners. Trump's willingness during his first administration to shoulder criticism for changing the US approach to North Korea created new diplomatic opportunities, although the proposition of such efforts had essentially not changed. This second time around, he should be willing to once again take the necessary risks, given the rapidly changing geopolitical environment. Policy intransigence toward North Korea only benefits Kim Jong Un and runs counter to the national interests of the United States and its allies.