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Congress Supports  
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in North Korea But Still  
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## Congress Supports Action for Human Rights in North Korea But Still Does Not Act

There is little chance that Congress will



before the midterm elections, leaving the position of special envoy for North Korean human rights empty.

By Robert King

August 25, 2026



*President Donald Trump delivered a State of the Union address to the 119th United States Congress, February 24, 2026 | Source: The White House*



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Congress will be in session for roughly four weeks from Labor Day to the end of September, with an overcrowded agenda to complete approval of appropriations bills funding the U.S. government for the coming fiscal year. There is little chance that reauthorizing the North Korean Human Rights Act, which expired in September 2022, will be considered. The legislation is not controversial—when the bill was last approved in 2017–2018, the House of Representatives passed it with 415 in favor and no one opposed, and the Senate approved it a few months later by unanimous consent. The result is that the U.S. Department of State has no special envoy for North Korean human rights, U.S. representatives at the United Nations ignore the issue, and diplomats feel no pressure to report to Congress on North Korean human rights.

The chances that Congress will extend the North Korean Human Rights Act before the 2026 election are slim to none. All 435 seats in the House are up for election this November. Recent forecasts suggest a razor-thin margin, with only nineteen House seats a toss-up. In the one-hundred-member Senate, thirty-five seats are up for

election this year, reflecting the rolling six-year term for senators. As with House races, control of the Senate will likely be extremely narrow for whichever party ultimately comes out on top. Of course, there are always last-minute twists that could change results.

Over the past two years, the political margins in both the House and the Senate have been so narrow that Congress has been largely dysfunctional. Controversial actions by President Donald Trump and the very narrow margins in both chambers of Congress have made governing particularly difficult. One consequence is that even routine, non-controversial legislation, including measures that enjoy broad bipartisan support, such as the North Korean Human Rights Act, has not been adopted by Congress.

### **Past Attempts Have Failed**

Both Democrats and Republicans have traditionally shown strong support for the North Korean Human Rights Act, which was first adopted by Congress in 2004, and subsequently extended in 2008, 2012, and 2018.

Since 2008, the legislation has called for the appointment of a special envoy with ambassadorial rank to focus on human rights. Trump signed the legislation in 2018, but he failed to appoint an envoy during his first term. President Joe Biden appointed career diplomat Julie Turner as special envoy for North Korean human rights on October 13, 2023, although the North Korean Human Rights Act had expired and had not been renewed by Congress at the time of her nomination and confirmation.

The president does have the authority to nominate an individual for ambassadorial rank, but the nomination must be confirmed by the Senate. Turner served in that position until shortly after Trump's Secretary of State Marco Rubio moved Ambassador Turner to another position in the Department of State, and the special envoy position technically no longer exists.

When the North Korean human rights legislation expired in 2022, efforts were made in both the House and the Senate to reauthorize the law. Ironically, the U.S. senator who introduced the reauthorization legislation and guided it through a Senate vote was Rubio, then a Florida senator. The

Senate approved the legislation, but Congress adjourned before reconciling the minor differences between the Senate and House versions of the legislation. Ironically, as secretary of state, Rubio eliminated the position of special envoy for North Korean human rights.

Toward the end of 2024, Representative Young Kim (R-CA) again secured a strong affirmative vote for her North Korean human rights extension bill in the House. Senators Rubio and Tim Kaine (D-VA) had also introduced Senate legislation earlier to extend the North Korean Human Rights Act, but the Senate did not vote on it. The House approved the legislation after the November 2024 presidential election, but there has been no further movement since Rubio was nominated as secretary of state and the Senate did not act.

### **The “Do-Nothing Congress”**

Bipartisan legislation was introduced in both the House and Senate in 2025–2026, following the start of Trump’s second term, to extend the provisions of the North Korean Human Rights Act. Representative Kim, with fellow California Representative Ami Bera (D-CA), did so in November 2025,

while Senators Kaine and Dan Sullivan (R-AR) introduced a Senate version in June 2026.

This far, no action has been taken on either House or Senate versions of the reauthorization legislation. Only four weeks are scheduled for legislative business from Labor Day to early October of this year, with Congress in recess for the month before the November 3 election. With other “must-pass” bills to deal with, including some critical funding bills, it appears unlikely that Congress will have time to take up the North Korean Human Rights Act before this Congress ends.

Despite overwhelming bipartisan support for measures to press North Korea on improving human rights, the current Congress seems unable to move forward even on bipartisan legislation that has had significant support from all sides. That support has been there for well over the last two decades. Trump has shown little if any interest in North Korean human rights, nor has Rubio shown interest in using his elevated position to pursue the issue.

With Trump talking about another summit with North Korea’s Kim Jong Un, it is even

less likely that we will see human rights legislation

Increasingly, the current stalemate in Congress brings back memories from an earlier era. The 119th Congress (2025–2026) has been a “do-nothing Congress,” as President Harry Truman said of Congress during the 1948 U.S. presidential election campaign. North Korean human rights is an issue that both chambers of Congress have strongly supported in the past, and it is unfortunate that legislation even on such a non-controversial issue languishes with inaction.

All bills introduced in the House and the Senate die when this Congress adjourns and the new Congress is sworn in, and the process starts over. By the time the 120th Congress could plausibly act, the law will have expired for close to half a decade, and the special envoy position will remain vacant. Congress has never voted against this legislation. Not once, in over two decades. It has simply stopped acting—even on things the Congress agrees on.

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Ship Repair Offers Best  
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## Ship Repair Offers Best Pathway for Modernizing the U.S.-South Korea Alliance

Korea can more effectively showcase its industrial capacity and fulfill the U.S. push for alliance modernization in ship repair, or maintenance, repair, and overhaul (MRO).

By [Namyeon Kwon](#)

August 18, 2026



*Military Sealift Command's Lewis and Clark-class dry cargo ship USNS Wally Schirra (T-AKE 8) departs Hanwha Ocean shipyard after a seven-month overhaul at Gyeongsangnam-do, South Korea, March 12, 2025 | Source: U.S. Pacific Command*



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There is growing momentum in the U.S.- South Korea shipbuilding relationship, driven by declines in U.S. naval power, where delays in new ship construction have converged with a maintenance backlog on aging vessels. In December 2025, President Donald Trump unveiled the “Golden Fleet” initiative and cited Hanwha in connection with a new class of frigates. More recently, the U.S. government reached out to Korean shipbuilders for information regarding their capacity to build destroyers and tankers, and the Korea-U.S. Shipbuilding Partnership Center opened in Washington.

However, greater opportunities for showcasing Korea’s industrial capacity and



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Korean yards are repairing U.S. Navy vessels, and Korean shipbuilders, including Hanwha Ocean, HD Hyundai, and HJ Shipbuilding & Construction, are winning contracts for MRO projects with U.S. ships. The next task for the two allies is to transform ongoing MRO cooperation into a stable sustainment pipeline for the alliance.

## **Where U.S.-South Korea Naval MRO Stands**

At the fifty-seventh Security Consultative Meeting in November 2025, Secretary of Defense Pete Hegseth announced that a U.S. warship would undergo MRO in Korea for the first time—a move described as “historic progress to enhance U.S. readiness and deterrence.” Efforts previously confined to contracts between the Navy and individual Korean firms are now being elevated to discussions of alliance readiness.

The current contracts primarily involve Military Sealift Command auxiliaries, dry cargo and ammunition ships, and fleet replenishment oilers, which share considerable technical ground with commercial vessels and have lighter technology protection and security burdens than combatants. However, as MRO efforts extend to warships, Korean companies will face challenges related to laws and regulations, access to technical data, and security and certification. Korea’s ability to navigate these obstacles will depend on which vessels the United States sends for overseas repair and how far it

draws allied industries into its sustainment network.

Predictability is another challenge.

Contracts are awarded intermittently, and even after contracts are signed, the project scope and timeline can shift. For instance, the midterm availability for *USNS Amelia Earhart* began at roughly USD 3.86 million, but the obligated amount later rose to about USD 15.95 million (figures from the U.S. spending database, queried in April and August 2026), which extended the end date. Industry accounts indicate that the Navy repeatedly requested additional work during the availability, expanding the job beyond its original scope. Such changes and delays are not unusual in themselves, as repair projects often reveal previously unknown defects once an availability is underway.

The difficulty is that such changes affect a yard's ability to plan. The Government Accountability Office (GAO) has noted that growth work, identified during a maintenance period but not originally planned, is a significant driver of delays and can occupy dry docks longer than planned, disrupting subsequent repair periods. GAO has also observed that the

Navy routinely revises its shipbuilding plans and repair projections, which does not provide the industrial base with a stable demand signal on which to base investment decisions.

### **From Contracts to Alliance Sustainment Capacity**

The foundation for treating naval MRO as more than industrial cooperation and as alliance sustainment is already in place. The Pentagon announced the Regional Sustainment Framework (RSF) in 2024, which seeks to provide sustainment closer to the point of need by drawing on allied and partner maintenance capacity. In addition, the Partnership for Indo-Pacific Industrial Resilience (PIPIR), which launched the same year, brings together sixteen member countries, including Korea, to cooperate on defense industrial resilience across production, supply chain resilience, sustainment, and policy and optimization. Within these two mechanisms, Korea is pursuing an MRO pilot project for a U.S. Army watercraft and establishing a CH-47 Chinook T-55 engine repair hub.

How, then, should naval MRO maximize the use of existing mechanisms? The concept of deterrence by capacity provides a helpful framing: deterrence rests not only on capability and resolve but also on the industrial capacity to replace expended materiel and return damaged systems to service. The Pentagon should use RSF and PIPIR to more explicitly position repair work in Korea within theater sustainment planning. Doing so would require metrics for measuring performance, a means of validating it, and the demand to sustain it.

Measurement comes first. Beyond industrial results such as awarded vessels and contract values, both governments should also assess performance from a sustainment perspective, through repair throughput, turnaround time, schedule adherence, and surge capacity. Tracked and reviewed jointly through RSF implementation, the PIPIR sustainment workstream, and the U.S.-Korea Logistics Cooperation Committee, theater planners should incorporate the collective repair record of Korean yards rather than viewing them as a series of separate contracts.

Capacity identified this way gains credibility when validated under realistic conditions.

The U.S. Navy has conducted Ship Wartime Repair and Maintenance Exercises (SWARMEX) with the Seventh Fleet to give forward-deployed ship repair teams in the Indo-Pacific region experience in battle damage assessment and repair while building ties with local repair industries. In the first such exercise held in Japan, U.S. naval repair organizations, the Japan Maritime Self-Defense Force, and a local Japanese yard cooperated on maintenance of the *USS Fitzgerald* destroyer. U.S.-Korea combined exercises should incorporate a comparable repair element. Doing so would show how the partnership performs under contingency conditions—which contract records cannot—and would extend cooperation to military-to-military sustainment.

Measurement and validation, however, hold up only under predictable demand. Repair capacity rests on investment in facilities and workforce, and such investments are preferable under a stable understanding of future workload. In its 2026 shipbuilding plan, the Navy stated it would pursue multi-ship sustained partnerships and award contracts for complex maintenance earlier to lengthen planning horizons for private

yards. The Navy should extend those methods to allied yards, which would give Korean firms a more solid foundation for investments. From the U.S. side, a stable demand signal is an important condition for securing repair capacity from allies, ensuring it is available when needed.

## **Conclusion**

U.S.-South Korea naval MRO is not simply an industrial matter. By supporting the readiness of U.S. naval forces in theater, it contributes directly to regional deterrence. The trust and record built along the way form a bridge toward broader cooperation in shipbuilding. It is, in that sense, an axis that strengthens the alliance on both the security and industrial fronts.

The two countries should focus on managing ongoing repair cooperation as a stable sustainment capacity for the alliance rather than as a collection of individual contracts. If the current record of contract awards is connected to predictable maintenance planning, measurable performance, and logistics cooperation that links peacetime to contingency, naval MRO in Korea could become a durable sustainment capacity for the alliance.

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## Why Kim and Trump Should Meet

President Donald Trump is willing to pursue a more unconventional approach than traditional U.S. politicians, and the next U.S. leader may not be as accommodating to North Korean demands.

By Troy Stangarone

August 17, 2026



*President Donald Trump meets with North Korean Leader Kim Jong Un in Singapore, June 12, 2018 / Source: The White House*



Since U.S. President Donald Trump's return to the White House, speculation has



repeatedly surfaced about a future meeting with North Korean leader Kim Jong Un. Much of this has been driven more by the desire to restart nuclear talks than by any substantive indication that a meeting is imminent. Despite the lack of substance to much of this speculation, there are reasons why Kim should pursue a meeting with Trump.

From Pyongyang's perspective, time seems to be on its side. Since the pandemic, North Korea has gained confidence in its ability to navigate the international environment without engaging the United States. Its self-imposed border closures demonstrated that the regime could survive, at least temporarily, under the harshest sanctions. Russia's war against Ukraine then opened unprecedented opportunities for Pyongyang to earn revenue, acquire technology and weaken the broader sanctions regime.

Geopolitical shifts have also moved in North Korea's favor. With the United States and China increasingly moving from competition across a wide range of issues to rivalry, Beijing has less incentive to cooperate with Washington to bring Pyongyang back to the negotiating table.

As a result, talks with the United States are no longer the key to ensuring regime stability in North Korea. Instead, an increasingly close partnership with Russia and improving relations with China provide the regime with the financial lifeline and political cover it needs internationally. Additionally, under the current dynamics, there is a strong incentive for Pyongyang to work with Moscow and Beijing to further hollow out the international sanctions regime.

This context helps explain why Kim did not accept Trump's offer to meet last year when South Korea hosted the Asia-Pacific Economic Cooperation (APEC) summit. The summit was an unappealing venue for U.S.-North Korea talks. Kim would have only been a secondary focus. The trade deals Trump was expected to conclude with Beijing and Seoul, along with the APEC summit itself, were what the international media would focus on. In the absence of a real agreement, any meeting would have only been a footnote to broader events.

Despite the limited incentives for Kim to meet with Trump, he should. The last round of talks during Trump's first term did not go well, but Trump is a unique figure in U.S.

politics. He may not have been able to accept the deal that Kim put on the table in Hanoi, but he is more open to an unconventional approach than more traditional U.S. politicians.

A successor will not be as accommodating. Whether the next president is U.S. Vice President JD Vance, Secretary of State Marco Rubio, or one of a number of Democrats expected to run in 2028, they will either take a harder line on North Korea than Trump or deprioritize the issue. A deal with Trump may not be what Kim hoped for in 2019, but this may be his best chance to reshape relations with the United States.

Any agreement with Trump also has a much better chance of sticking than an agreement negotiated with a future president. Trump will continue to carry political influence after he leaves office. While he has been willing to tear up deals, more traditional U.S. presidents have been less willing to do so. Any Republican successor would face strong political pressure to protect Trump's legacy as long as North Korea was keeping to the agreement.

A Democratic successor would have little incentive to abrogate a deal. Not only would ending a deal simply because Trump negotiated it be a poor use of political capital, but a Democratic administration would also prioritize more pressing domestic concerns and the need to repair U.S. alliances.

All of this means that we are at a unique moment for North Korea to engage the United States. In the past, Pyongyang might have waited to see the results of the midterm elections before committing to a course. That would also be a misreading of the current U.S. environment.

If Kim is to meet Trump, however, North Korea will need to learn from the last attempt to negotiate with the U.S. leader. That means developing clear and obtainable policy objectives that Pyongyang hopes to achieve, what the United States could realistically provide, and taking a realistic approach to the issues that must be resolved in advance of a summit and those that truly can only be resolved between Trump and Kim. The Hanoi summit failed because North Korea did not do the necessary policy planning in

advance. Avoiding a second failure will require it.

If Kim wants to reshape North Korea's relationship with the United States, the time is now. He may be right that in the medium term, relations with Russia and China matter more, but geopolitics can change for unforeseen reasons. He will also never have a more willing partner than Trump. The only question is whether North Korea is willing to explore the opportunity in front of it.

This article was originally published in *Korea Times* on August 14.

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The U.S.-Saudi Nuclear  
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## The U.S.-Saudi Nuclear Deal Is a Test Case for South Korean Uranium Enrichment

U.S. and South Korean policymakers should develop diplomatic and institutional measures to address potential concerns and opposition surrounding nuclear-powered submarine and fuel cooperation.

By Ellen Kim

August 3, 2026



2025 / Source: The White House



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On July 22, the United States and Saudi Arabia signed a civil nuclear cooperation agreement. However, the future of the agreement became uncertain the following day when President Donald Trump made Saudi Arabia's normalization of relations with Israel, via accession to the Abraham Accords, a final requirement for its implementation.

The U.S.-Saudi nuclear agreement has drawn considerable attention in South Korea because the U.S. administration has opened the possibility of allowing uranium enrichment on Saudi territory, contingent upon the results of a two-year joint feasibility study. During bilateral negotiations to revise the 2015 U.S.-South Korea civil nuclear cooperation agreement, South Korea sought but could not obtain U.S. advance consent to enrich or reprocess U.S. spent nuclear fuel. That situation began to change after President Trump approved a nuclear-powered submarine program for South Korea during his summit with South Korean President Lee Jae Myung last October. The two governments subsequently agreed to cooperate on options for procuring nuclear submarine fuel, and bilateral discussions

on civil nuclear cooperation, including on uranium enrichment, resumed with working-level talks held in June of this year.

Against this backdrop, the future of the U.S.-Saudi nuclear cooperation agreement will serve as an important test case for future U.S.-South Korea talks. The decision to conditionally permit uranium enrichment in Saudi Arabia, even as the United States remains engaged in a conflict with Iran aimed at preventing the country from acquiring nuclear weapons, has already prompted concerns in Congress that the agreement could fuel an arms race and spur nuclear proliferation in the Middle East.

The security environment on the Korean Peninsula is not so different. While the United States and South Korea continue to pursue the denuclearization of North Korea, South Korea's pursuit of a low-enriched uranium program to support its nuclear-powered submarine program is also likely to face criticism from those concerned about nuclear proliferation in Northeast Asia. Consequently, even if the U.S.-Saudi nuclear agreement ultimately clears congressional approval, growing

concerns over nuclear proliferation in the United States and the broader international community could pose significant obstacles to advancing future U.S.-South Korea cooperation on these issues.

For this reason, U.S. and South Korean policymakers should closely examine the U.S.-Saudi nuclear agreement and develop diplomatic and institutional measures to address potential concerns and opposition surrounding nuclear-powered submarine and fuel cooperation.

First, South Korea should clearly differentiate its case from that of Saudi Arabia. Unlike Saudi Arabia, South Korea ratified and brought into force the International Atomic Energy Agency (IAEA) Additional Protocol to its Safeguards Agreement in 2004. Since then, it has accepted expanded IAEA access and short-notice inspections, strengthened the transparency of its civilian nuclear activities, and faithfully fulfilled its obligations under the international nonproliferation regime. South Korea should emphasize this strong nonproliferation record and make clear that any future uranium enrichment program for nuclear-powered submarine development

would operate under the IAEA's stringent safeguards and verification regime. In addition, Seoul should proactively propose additional enhanced safeguards and verification mechanisms to ensure that nuclear materials cannot be diverted for purposes beyond those agreed upon by Washington and Seoul.

Second, the United States and South Korea should develop a win-win strategy for civil nuclear industry cooperation. South Korea currently operates twenty-six nuclear power reactors and has emerged as a major exporter of nuclear power plants. To compete more effectively with China and Russia, whose influence in the global nuclear market continues to expand, the United States and South Korea should leverage their respective strengths to build a more competitive partnership. Given South Korea's recent indication of energy as a priority sector for its investment projects in the United States, there is an opportunity to align these investments with expanded bilateral cooperation in the nuclear industry.

Finally, the most important prerequisite for U.S.-South Korea cooperation on nuclear-powered submarines and fuel is mutual

trust. Such cooperation cannot be advanced solely through decisions by the executive branch in the United States; it will ultimately require the support and approval of Congress. However, the current U.S.-South Korea relationship faces multiple challenges spanning security, trade, and other areas. Rather than addressing nuclear cooperation in isolation, both governments should manage the alliance comprehensively and approach these issues with a long-term perspective, resolving them gradually while preserving the broader strength and credibility of the alliance.

This article was originally published in Korean in *Hankook Ilbo* on August 1.

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## North Korea Doubles Down on Its Alliance With Russia, For Now

Kim Jong Un's strategic calculus toward the North Korea-Russia partnership depends on the outcome of the war in Ukraine and its economic and political impact on Russia.

By Daniel Sneider

August 12, 2026



*Russian President Vladimir Putin conducts a state visit to North Korea for a summit with North Korean leader Kim Jong Un, June 2024 | Source: Russian Presidential Office*



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North Korean leader Kim Jong Un has doubled down on his military and strategic alliance with Vladimir Putin and the Russian regime, betting that this axis will strengthen his own position for now. However, Kim's strategic calculus depends on the outcome of the war in Ukraine and its economic and political impact on Russia.

The flow of arms and soldiers from North Korea to Russia's war in Ukraine continues to escalate, accompanied by a growing supply of North Korean labor to fill the gaps in Russia's war-strained economy. And the North Korean economy is increasing its reliance on a largely unofficial transfer of Russian resources—food, energy, cash and military technology—offered as compensation for its support.

The latest sign of this deepening relationship came from Ukrainian President Volodymyr Zelenskyy, who revealed in a late July address that Russia planned to bring in an additional 30,000 troops and deadly ballistic missile launchers.

“Russia wants to receive another 30,000 troops from North Korea. Since June, preparations have been under way in Russia's Voronezh region to receive them,”

Zelenskyy said, though he did not reveal the source for this information, and it has not yet been independently confirmed.

A North Korean missile unit has begun deploying to western Russia and could be equipped with up to 120 ballistic missiles and six launchers for attacks on Ukraine, an official at Ukraine's military intelligence agency said on August 6.

The unit comprises about ninety North



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Official said. The United States is aware of the North Korean deployment, a source familiar with the issue told Reuters.

Forty North Korean missiles have already been supplied, at least two of which were launched at Ukraine last week during a deadly strike, the Ukrainian official said.

“This is a threat not only to Ukraine,” Zelenskyy said in his radio address. “Russia is helping North Korea learn how to wage war, improve its weapons and gain real combat experience in using them.”

### **The Changing Nature of War in Ukraine and North Korea's Role**

There is some skepticism about these reports, as they have not been confirmed by other intelligence agencies. They also reflect Ukraine's interest in pushing for more military support to counter missile strikes that are increasingly penetrating Ukrainian defenses, including calling on South Korea to lift restrictions on the sale of missile defense equipment directly to Ukraine.

"In my view, the Republic of Korea should have closer cooperation with Ukraine. We are open to this. We would very much like to receive support from South Korea in an area where we have a shortage. That is air defense systems," Zelenskyy said in an interview with Ukrainian media posted to X on August 8.

But analysts point out that these possible new deployments are consistent with the changing nature of warfare in Ukraine. When North Korea's military assistance began more than two years ago, it first consisted of a huge flow of artillery shells and artillery guns, providing crucial help when Russian stocks were depleted by intense exchanges of artillery fire. It was followed by the deployment of 12,000–16,000 North Korean troops to help push

back Ukraine's incursion into the Russian territory of Kursk, carefully avoiding conflict within Ukrainian territory itself.

Now drones have partially replaced heavy artillery, with static lines of engagement on the ground and heavy casualties, combined with long-range deep attacks using missiles.

"Russia and Ukraine are currently engaged in two battles," explains Aihiro Makino, a security expert for Japan's *Asahi Shimbun*. "Trench warfare on the front lines centered on the Donbas region, and long-range attacks targeting each other's deep territories."

North Korea has a role to play in both battles, says Makino, a long-time specialist on the Korean Peninsula. North Korean missiles are joining attacks on Ukrainian cities, and North Korea can send troops to the Donbas region, as it recognizes Donbas as Russian territory (despite being seized from Ukraine)—although such a move would risk high casualties.

There are political risks for Kim if casualty levels reach tens of thousands. But he has

already decided to embrace the several thousand deaths from the earlier deployment as a heroic mission. In April, the regime opened a lavish “Memorial Museum of Combat Feats for Overseas Military Operations,” which includes war trophies such as U.S. and German tanks and the graves of some 2,288 North Korean soldiers who fought in Kursk.

“Kim’s regime does not care about human lives,” says Fyodor Tertitskiy, a North Korea expert and author of *Pyongyang on the Brink*, now teaching at South Korea’s Ewha Womans University. “It does, however, care about its own survival, and it has calculated that Putin’s favor outweighs the risks,” he told this writer.

One added element to North Korea-Russia ties is the rapidly growing dispatch of North Korean workers, in the tens of thousands, many of them filling serious labor shortages in factories and other roles across Russia.

“Demand for North Korean labor remains high and is likely to stay high for the foreseeable future,” widely respected expert Andrei Lankov, who teaches at South Korea’s Kookmin University, told this writer. “North Korean workers are already

widely employed in the civilian economy, where labor shortages are severe. They can also be used in areas close to the front line and employed in certain military industries.”

### **Kim’s Strategic Calculus**

“The strategic calculus remains the same,” says Tertitskiy. “Putin wants to conquer Ukraine and welcomes Kim’s help, while Kim wants economic assistance and a counterbalance to China.”

Kim has so far managed to intensify his relationship with Moscow while also keeping close ties to North Korea’s traditional ally, China. High-level visits from senior Chinese officials have cemented their ongoing role in North Korea’s economy.

Measured by official trade statistics, China remains the overwhelming dominant player in North Korea’s foreign trade.

China accounts for over 98 percent of North Korea’s foreign trade.

But official statistics do not calculate the huge, and in some cases larger, volume of unofficial trade, mostly to evade UN

sanctions. Official data for Russia shows a tiny amount of trade—some USD 35 million in 2023, for example. But a recent report from South Korea's Institute for National Security Strategy calculated that North Korea earned up to USD 14.4 billion from Russia from August 2023 to the end of 2025, mostly from payments for its arms and soldier supplies but also other illegal exports of food and fuel.

This does not count transfers of advanced military technology that have been kept secret but may already include air defense systems, satellite technology, drones, and early warning aircraft.

At the moment, Russian input into North Korea's modest economic boom of late has been crucial. But in the longer run, argues Lankov, the two economies are not compatible. On the other hand, he says, "China needs many of the goods that North Korea is capable of exporting and therefore has a natural economic interest in buying North Korean minerals, seafood, and other products. In addition, China's strategic interests require a stable North Korea. Beijing has a strong interest in preserving the status quo and maintaining a buffer zone along its border. For Russia, by

contrast, North Korea's strategic value is considerably lower."

### **Implications of the Ukraine War**

Kim's investment in the alliance with Moscow is clearly a successful bet for now. But what happens if the war goes badly and the Russians are forced into a de facto political defeat in the form of a settlement that favors Ukraine? Or a prolonged stalemate that weakens Russia both politically and economically?

Even then, North Korea watchers all agree that the Kim regime is likely to survive that turn of events.

At this moment, the regime has not told the North Korean public that the war has reached a stalemate, says Makino. "Even if Russia is defeated, the public will be told that 'Russia has won.' North Korea's rule is that 'the Supreme Leader does not make wrong decisions.'"

Lankov shares that view. "North Korea is not tied to Putin's Russia, and it never will be," Lankov told this writer. "It is now in the ideal position of having two sponsors. North Korea, while living on a stable but

modest Chinese pension, has won the Russian lottery. If the lottery money runs out, it will be bad, but hardly the end of the world, since the Chinese pension is here to stay.”But For the time being, the North Korea-Russia partnership remains strong and beneficial for both parties and likely to weather the changing nature of the war in Ukraine.

*Daniel C. Sneider is Nonresident Distinguished Fellow at the Korea Economic Institute of America (KEI). The views expressed here are the author's alone.*

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August 25, 2026 · 1 min read



By Ellen Kim

KEI Senior Fellow Ellen Kim spoke with Reuters about President Trump's order to reduce U.S. participation in the Ulchi Freedom Shield exercise.

“Trump is trying to catch three birds with one stone here,” Ellen Kim says.

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Home > Politics & Diplomacy > Kim Jong Un Has No Interest in Meeting Donald Trump

## Kim Jong Un Has No Interest in Meeting Donald Trump

North Korean leader Kim Jong Un is in a far stronger negotiating position than in 2019 and sees little need for U.S. sanctions relief or a meeting with President Donald

Trump



*President Donald Trump and North Korean leader Kim Jong Un meet in Hanoi for their second summit meeting, February 2019 | Source: The White House*



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Yesterday, President Donald Trump announced he would meet North Korean leader Kim Jong Un before the end of the year. While the U.S. president seems certain that the North Korean leader wants to meet with him, reception from Pyongyang toward Trump's outreach has been ice-cold. Kim is in a far more advantageous geopolitical position than in 2019, when the two last met, and does not need rapprochement with the United States to achieve its objectives. However, despite Kim's economic and military gains from the ongoing war in Ukraine, he should not discount the benefits of meeting with Trump.

Kim has fully inserted himself into the war in Ukraine by supporting Putin's war machine and has boosted his nuclear weapons program with Russian assistance. Buoyed by cryptocurrency, heists and remote IT worker schemes, North Korean cyber criminals continue to generate considerable revenue for the regime. Compared to their previous round of diplomacy, Kim is in a far stronger negotiating position and sees little need for U.S. sanctions relief or a meeting with the unpredictable U.S. president.

Trump's resurgent interest in North Korea comes on the back of a U.S. military quagmire in the Middle East. Desperately looking for a diplomatic victory after failed negotiations with Iran, Trump has set his sights again on the Korean Peninsula and is looking to revitalize his personal relationship with Kim. Trump seems to think that diplomacy with the North Korean leader will be easier and smoother than the last time because Kim allegedly treated him with "great respect."

Unfortunately for Trump, Kim is likely to ignore his overture. The war in Ukraine allowed Kim to reduce his economic dependence on China and expand his economy. By providing weapons and soldiers to Russia, Kim has reaped massive economic benefits. Kim has rejuvenated the domestic defense manufacturing base and expanded access to Russian markets. Since 2022, North Korea's economy has grown by over 3 percent annually. Even North Korea's rural regions, long seen by the regime as potential hotspots of discontent and thus neglected economically, have recently seen development, with new medical facilities being built across the country.

Despite Kim's recent successes, he should not discount this once-in-a-lifetime chance to take advantage of the most mercurial U.S. president. Trump seems extremely keen to meet again with Kim and discuss nuclear weapons. If Kim is savvy and opportunistic, he would meet with Trump and ask the United States to remove all its troops from the Korean Peninsula. The presence of U.S. troops in South Korea has long been a sore spot for the North. Trump, who recently requested to "substantially reduce" U.S. joint military exercises with South Korea, may give in and reduce—or altogether eliminate—the U.S. troop presence in South Korea. A glitzy way to officially end the world's longest-running conflict, the Korean War, would reinvigorate Trump and distract his followers from his obvious foreign policy failures in the Middle East.

Kim Yo Jong, Kim Jong Un's sister and close confidante, said in North Korea's state-run media that she was "completely unaware" of any communication between the two leaders and that her brother has no interest in meeting Trump as long as the "hostile" U.S. policy remains in place. While Kim Yo Jong is known for having a prickly

and formidable personality, the “Dear Leader” himself has thus far not publicly spoken about Trump’s recent outreach. While it remains to be seen whether Kim Jong Un responds to Trump, the U.S. president should understand that this is not the same North Korean leader he once negotiated with.

*Benjamin R. Young is Non-resident Fellow at the Korea Economic Institute of America (KEI) and Assistant Professor of Intelligence Studies at Fayetteville State University. The views expressed here are the author’s alone.*

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## Washington's Cold Peace Is Seoul's Hot Risk

Any U.S.-North Korea nuclear agreement that reduces the threat to the American homeland while leaving South Korea with more responsibility but no commensurate reduction in danger is not genuine de-escalation but risk relocation.

By Shin-wha Lee

August 24, 2026



*A U.S. Marine Corps helicopter flies over Seoul during the Korean Marine Exchange Program, July 24, 2026 / Source: U.S. Forces Korea*



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A negotiated accommodation with a nuclear-armed North Korea may become unavoidable for the United States and South Korea. But an agreement is not the same as a stable order. The real test is whether diplomacy reduces risk for the alliance as a whole, rather than shifting the most dangerous parts of that risk from Washington to Seoul.

Before any major diplomatic opening, Washington and Seoul should jointly assess how changes in wartime operational control (OPCON), U.S. force posture, and diplomacy with Pyongyang interact, rather than allowing them to proceed as separate policy tracks. The allies also need a clearer agreement on the roles of the United Nations Command (UNC), Combined Forces Command, and South Korean authority before a crisis forces those questions into the open.



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Russia but also Russian technology, training, and battlefield experience flowing back to North Korea. A diplomatic settlement may reduce one category of threat without resolving the larger security problem. An

agreement that reduces the threat to the American homeland while leaving South Korea with more responsibility but no commensurate reduction in danger would not be genuine de-escalation. It would be risk relocation.

Seoul's task, therefore, is to ensure that alliance adaptation does not become strategic decoupling. Close U.S.-Korea coordination must remain the foundation, while minilateral and multilateral institutions provide insurance when bilateral politics or universal mechanisms falter. The objective is not to dilute the alliance, but to keep authority, responsibility, and security aligned as circumstances change. For Seoul, that is the essential measure of a durable cold peace. Risk reduction must be shared, not transferred.

### **Three Transitions at Once**

The alliance is undergoing three transitions at once. The first is command. The Lee Jae Myung administration wants to accelerate the conditions-based transfer of OPCON. The second is force posture. The United States wants South Korea to assume more responsibility for deterring the North while giving U.S. forces greater flexibility for

wider Indo-Pacific missions. The third is diplomacy. U.S. President Donald Trump remains interested in dealing directly with North Korean leader Kim Jong Un, while the Lee administration is encouraging another opening and pursuing a more engagement-oriented policy of its own.

None is inherently destabilizing. OPCON transfer can strengthen South Korean agency; a revised division of labor can make the alliance more sustainable; and diplomacy may constrain parts of North Korea's nuclear buildup or reduce the risk of miscalculation even if it cannot eliminate the threat. The risk lies in simultaneity. If command arrangements are changing while U.S. military roles are being redefined and negotiations with Pyongyang put exercises, deployments, or deterrence measures into play, responsibilities can shift before political and military expectations are clarified.

A recent disagreement between South Korea and UNC is a small but revealing example of this synchronization problem. In mid-August, reporting revealed UNC plans to consolidate Joint Security Area security and Military Armistice Commission functions into a single brigade. The

command described it as an internal reorganization with no added capability and said Seoul had been informed throughout, but South Korea's Minister of National Defense Ahn Gyu-back said the next day that the two sides had agreed not to proceed. This development exposed an institutional question that will become more consequential as OPCON transition advances: who has authority over what, from armistice to gray-zone confrontation to war?

The distinction matters because OPCON transition concerns the combined warfighting command: it does not eliminate UNC's separate responsibilities under the Korean War Armistice Agreement. If the two arrangements evolve without being clearly reconciled, Seoul could assume expanded responsibility for wartime operations while the allies remain uncertain on the delegation of authority during the crisis that precedes war.

That is the broader danger of the three transitions. Strategic decoupling need not result from a deliberate political decision. It can emerge from poorly synchronized transitions. Pyongyang need not break the alliance—it need only identify the moment

when Washington and Seoul are least able to respond with a single political and military voice. That moment does not require a decision in Pyongyang so much as a date, and Kim Jong Un has the luxury of waiting for one.

### **Friction Is No Longer Confined to Security**

Simultaneous transitions create a timing problem, while cross-domain spillover creates an issue-linkage problem. U.S.-South Korea disagreements increasingly spill across policy domains.

The Coupang dispute is illustrative of this. Seoul views its response to the company's massive data breach as legitimate domestic enforcement, while some members of the U.S. Congress and other critics in Washington have portrayed it as discriminatory treatment of a U.S.-based firm. Seoul has insisted that the dispute should remain separate from trade, investment, nuclear cooperation, or security talks. Yet, the need to draw that boundary shows how difficult such separation is becoming.

Coupang is not comparable in strategic weight to OPCON or extended deterrence. The broader concern is the erosion of barriers between policy domains. In a more transactional Washington, disputes over tariffs, investment, technology regulation, defense burden-sharing, civil-nuclear cooperation, and security can spill over into one another and compound. Any one may be manageable; several at once can create “bilateral overload,” weakening political trust and making it harder to insulate core security cooperation from political friction.

China and North Korea are likely to judge not each dispute in isolation, but the accumulation of disputes and what it reveals about alliance cohesion. Thus, the challenge is not simply to resolve individual disagreements, but to prevent them from spilling into critical security functions.

### **Seoul's Own Blind Spot**

The uncertainty reflects policy shifts on both sides of the alliance. In Seoul, the Lee administration has moved toward a more engagement-oriented, “peace first” approach while recalibrating the North Korea policy it inherited from its predecessor. On August 15, President Lee

called for talks on replacing the armistice with a peace regime and for practical steps to halt further nuclear buildup. This approach reflects a real dilemma: sanctions have not produced denuclearization, but the absence of dialogue has not stopped North Korea from expanding its arsenal.

The problem is that dialogue without leverage is unlikely to change Pyongyang's calculations. North Korea has so far rejected Seoul's overtures while continuing to strengthen its military. Under these conditions, repeated reassurance or unilateral gestures may reduce tension at the margins, but they could also convince Pyongyang that pressure produces accommodation.

This is why strategic continuity matters.

The Nuclear Consultative Group, strengthened extended deterrence mechanisms, and the institutional gains of Camp David, including deeper trilateral deterrence and security cooperation, should not be treated as partisan legacies of the previous conservative government. They are accumulated assets of the South Korean state and provide the leverage that makes diplomacy more credible.

That matters especially as Washington asks Seoul to carry a larger share of its own defense. If South Korea seeks more autonomy while weakening the institutions that underpin allied deterrence, it could bear a heavier burden while gaining less influence over U.S. decisions. Likewise, South Korea should not simply welcome renewed U.S.-North Korea negotiations without first defining the outcomes it can and cannot accept. Otherwise, it risks encouraging a process in which South Korean interests are discussed without sufficient South Korean influence.

The choice, therefore, is not between deterrence and engagement. It is to ensure that deterrence gives engagement leverage, while engagement does not erode deterrence.

### **Institutional Insurance for the Alliance**

These pressures make the case for institutional insurance. The U.S.-South Korea alliance must remain the anchor of South Korea's security, but it should not be the sole channel through which every military, diplomatic, and economic shock must be managed. The answer is not to hedge away from Washington, but to

reinforce the bilateral core with arrangements that preserve cooperation when political friction congests the alliance.

The first layer should be a more durable U.S.-South Korea-Japan framework. The Camp David mechanisms—missile-warning sharing, regular exercises, consultations, and economic-security cooperation—should be institutionalized so that they survive leadership changes in Washington, Seoul, and Tokyo. Pyongyang already treats the three countries as a strategic grouping. Their cooperation should therefore rest on routine institutions, not on the chemistry of individual leaders.

The second layer should more firmly connect Northeast Asian security to NATO's Indo-Pacific partners and European democracies. Russia has already connected the European and Korean theaters through North Korean troops and weapons in Ukraine. South Korea should deepen cooperation with Japan, Australia, Canada, the European Union, NATO, and other democratic partners on cyber defense, defense production, maritime security, drones, technology protection, and sanctions implementation. The value of these networks lies not only in shared

threats but also in shared rules, institutional habits, and political trust that can outlast individual governments.

The third layer should turn multilateral monitoring into coordinated enforcement.

The Multilateral Sanctions Monitoring Team (MSMT) has helped fill the monitoring gap left by the collapse of the UN Panel of Experts, but it cannot compel compliance. Seoul should connect its findings directly to coordinated action with the United States, Japan, Group of Seven (G7) members, and other capable middle powers on illicit finance, cyber theft, export controls, and Russian military-technology transfers to North Korea.

The division of labor should be functional. The U.S.-South Korea alliance remains indispensable for deterrence, intelligence, and high-end military integration. In addition, minilateral coalitions can provide operational continuity and implementation capacity, while broader multilateral institutions contribute legitimacy, rules, and political reach. Such an architecture reinforces the alliance without requiring Washington to initiate or manage cooperation in every domain. Where interests and capabilities converge, Seoul

should be able to organize collective action itself.

A more resilient architecture should also give South Korea room for selective engagement with China without incorporating Beijing into the democratic security framework itself. Beijing supports Pyongyang, but it may not benefit from a North Korea that is less dependent on China, strengthened by Russian assistance, and increasingly effective at drawing the United States, South Korea, and Japan together. Seoul should test whether that divergence creates space for cooperation, particularly on crisis management and constraining North Korea-Russia military ties. The aim is not strategic trust with China, but bounded cooperation where interests overlap.

### **Risk Reduction without Risk Transfer**

A cold peace is not necessarily peace. It is a distribution of risk.

That distinction matters as Washington again considers diplomacy with Pyongyang. President Lee has encouraged President Trump to pursue a phased approach that would initially freeze additional fissile-

material production, prevent transfers, and constrain further long-range missile development while preserving denuclearization as a longer-term goal.

There is logic to this approach. North Korea will not dismantle an expanding nuclear arsenal merely to enter negotiations. But the relevant question is not only whether a deal reduces risk. It is whose risk it reduces and where the remaining risk goes.

A bargain focused on long-range nuclear missiles could make the American homeland safer while leaving largely untouched the shorter-range nuclear forces that threaten South Korea and Japan. At the same time, the 2026 U.S. National Defense Strategy calls on Seoul to assume “primary responsibility” for deterring North Korea, backed by “critical but more limited” U.S. support.

Each policy is defensible on its own.

Together, however, they could produce asymmetric de-risking: Washington reduces the threat most dangerous to the United States while Seoul assumes greater responsibility for the threat that remains. The danger is not U.S. abandonment but

strategic decoupling resulting from the interaction of otherwise reasonable policies.

That possibility makes the problem larger than bilateral alliance management. Seoul must think not only about the strength of the alliance itself, but also about the institutional architecture that surrounds it.

*Shin-wha Lee is Professor of Political Science and International Relations, Director of Korea University's Institute for Interdisciplinary Unification Studies, and Former Ambassador for International Cooperation on North Korean Human Rights. The views expressed here are the author's alone.*

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## Why South Korea Cannot Reach Carbon Neutrality on Renewables Alone

Achieving South Korea's objective of carbon neutrality requires a comprehensive plan to develop a range of renewable energy sources.

By Randall Jones

August 10, 2026



*The Kori Nuclear Power Plant, July 2017 | Source: Shutterstock*



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South Korea's 2035 Nationally Determined Contribution (NDC), submitted to the United

Nations Framework Convention on Climate Change in December 2025, sets a target of reducing greenhouse gas (GHG) emissions by 53–61 percent relative to their 2018 level (Table 1). The lower bound lies along the linear pathway from 2018 to the target year for carbon neutrality (2050), while the upper bound would require enhanced government efforts, technological innovation, and industrial transformation.

Meeting either end of the target range implies more than doubling the pace of reduction achieved since emissions peaked in 2018—in an economy whose emissions intensity remains among the highest in the OECD. Facing criticism from business groups, President Lee Jae Myung stated that transitioning to a carbon-neutral society is an inevitable path for sustainable growth and for Korea to become a global economic power.

Narrowing the gap between the target and the tools currently in place to achieve it is challenging. Korea's overall carbon price averaged USD 30 per ton of CO<sub>2</sub> equivalent in 2023—less than half the OECD average—and most of the pricing comes from fuel excise taxes rather than the Korea Emissions Trading System (K-

ETS), which continues to allocate emission allowances free of charge to the sectors responsible for the large majority of industrial emissions.

On the supply side, renewables accounted for around 9 percent of power generation in 2024, against a 2035 target of at least 30 percent, in a country whose natural conditions make that expansion unusually difficult and costly. Whether Korea meets its 2035 NDC therefore depends less on the ambition of the target than on whether carbon pricing and the power mix are adjusted to match it.

**Table 1. Korea's Major Climate Policy Initiatives**

| Year | Program                                                                     | Objective                                                                 |
|------|-----------------------------------------------------------------------------|---------------------------------------------------------------------------|
| 2009 | Presidential Committee on Green Growth                                      | To promote Low Carbon, Green Growth                                       |
| 2015 | Korea's first NDC                                                           | Reduce GHG emissions by 37% from the business-as-usual projection by 2030 |
| 2016 | 2030 Basic Roadmap for Achieving the National GHG Reduction Target          | Mitigation plans for 8 sectors and 30 industries                          |
| 2020 | Korea's 2030 NDC                                                            | Reduce emissions by 26.3% from 2018                                       |
| 2020 | Framework Act on Carbon Neutrality and Green Growth (Carbon Neutrality Act) | A vision of carbon neutrality by 2050                                     |

### Successful Reductions in Greenhouse Gas Emissions

Korea's GHG emissions per unit of GDP have fallen significantly since 1990 but remain above other high-income countries (Figure 1). Korea's high level reflects its focus on manufacturing, which accounted for 26 percent of Korea's GDP in 2022, double the OECD average. Manufacturing is the main source of Korea's GHG

emissions, along with electricity generation. Energy intensity (energy supply per unit of GDP) has also fallen but remains high compared to other OECD countries (Figure 2).

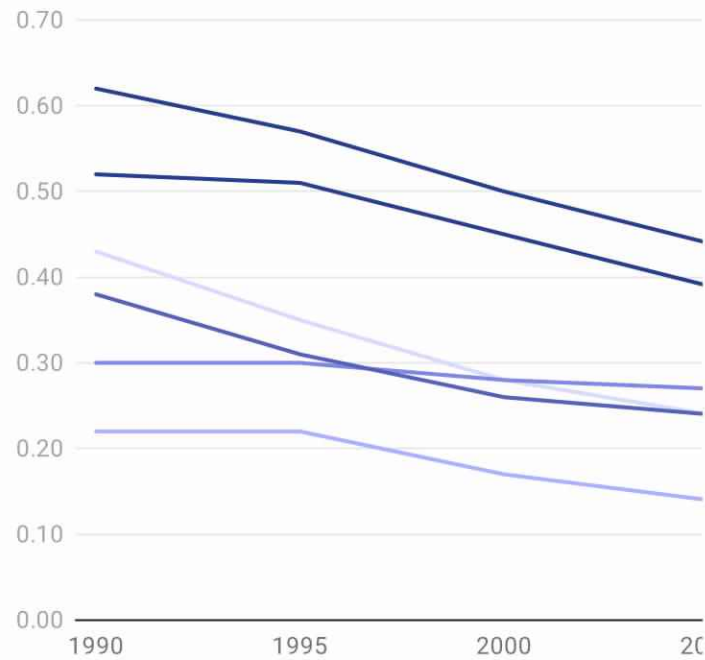
In per-capita terms, GHG emissions have nearly doubled since 1990, primarily reflecting income growth (Figure 3). Korea appears behind schedule to achieve its 2030 Nationally Determined Contribution (NDC) of reducing its GHG emissions by 40 percent from their 2018 peak (Table 1).

The government is now preparing its Second National Basic Plan for Carbon Neutrality and Green Growth to achieve its 2035 targets. In the NDC submitted last December, Korea set a goal of increasing the share of renewables in power generation, which was around 9 percent in 2024, to at least 30 percent by 2035, still well below the European Union, where its share was half in 2025. In addition, Korea's coal-fired power generation is to be phased out by 2040. The International Energy Agency has stated that advanced countries should close all unabated coal-fired power generation by 2030 to reach zero carbon emissions by 2050. Nearly three-quarters

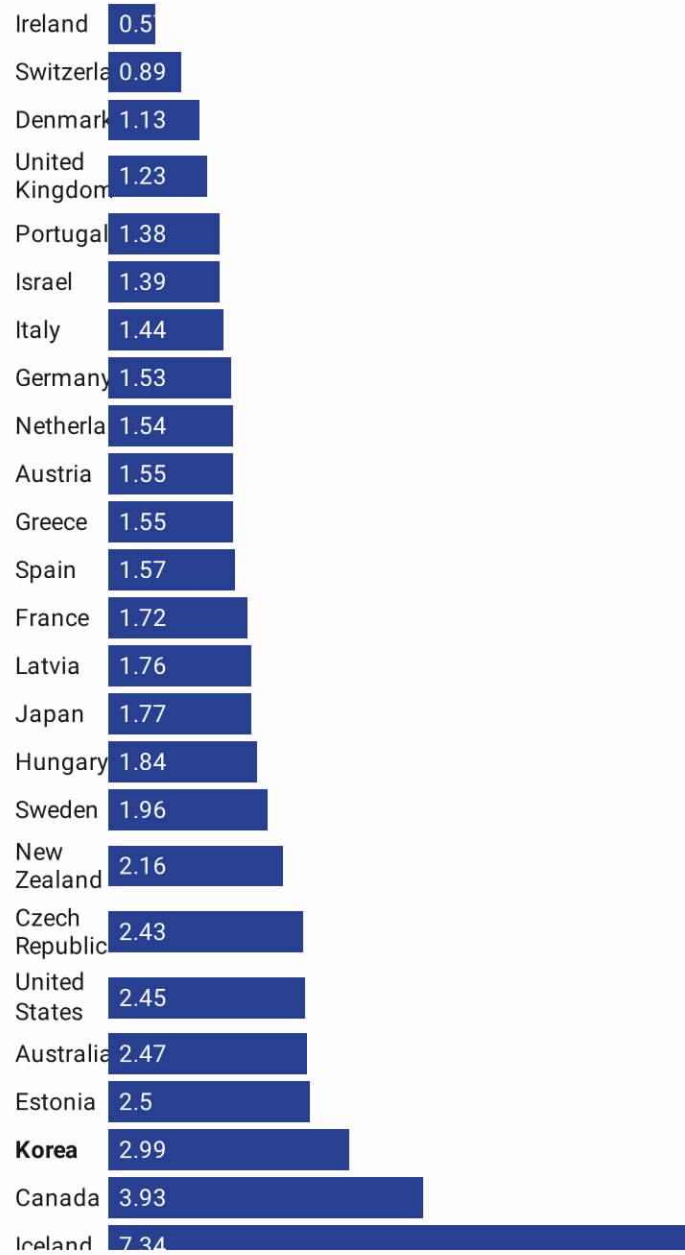
of OECD countries are on track to phase out coal by 2030.

### Figure 1. Greenhouse Gas Emissions Per Unit of GDP

Korea's greenhouse gas emissions per unit of GDP have fallen by half since 1990

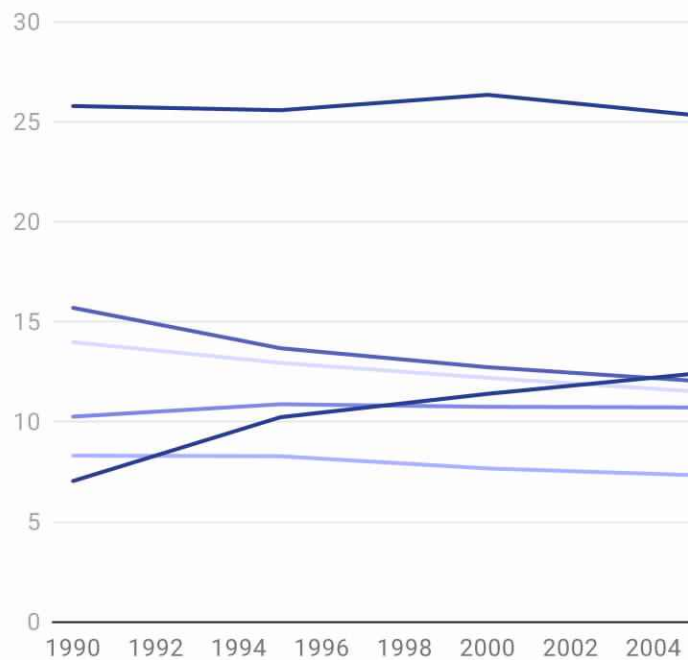


## Figure 2. Energy Supply Per Unit of GDP, 2022



### Figure 3. Greenhouse Gas Emissions Per Capita

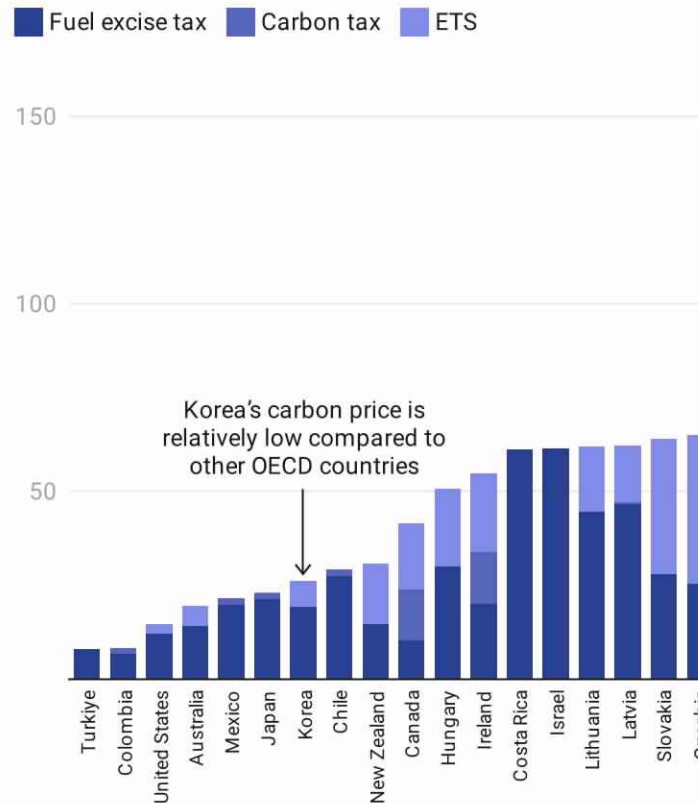
Korea's greenhouse gas emissions per capita have stabilized



### The Essential Role of Carbon Pricing

Korea applies carbon pricing through excise taxes on fuel, which covered 55.3 percent of its GHG emissions in 2023, and the K-ETS, which covered 80 percent. Overall, 98.5 percent of GHG emissions in Korea are subject to a positive net effective carbon rate. However, the overall price level averaged USD 30 per ton of CO<sub>2</sub> equivalent, less than half of the OECD average (Figure 4).

## Figure 4. Global Carbon Price Level



Unit: EUR per total CO<sub>2</sub> equivalent

Korea launched K-ETS in 2015, making it the first nationwide, mandatory cap-and-trade program in East Asia. However, the GHG emissions limit set by the K-ETS was not aligned with the GHG emission reduction targets in Korea's NDC. In addition, K-ETS gave emission allowances for free during the first phase (2015–2017).

During the second phase (2017–2020), only 3 percent of emission allowances were auctioned, and the share was increased to 10 percent in the third phase (2021–2025). The free allocation of emission allowances

creates several problems. First, it shields firms from the real cost of GHG emissions. Requiring firms to purchase emission allowances through auctions raises the marginal cost of carbon-intensive industries, such as coal power. Second, it deprives the government of substantial revenue that could be used to finance the green transition. Third, it favors established firms at the expense of new market entrants. Fourth, it disrupts the functioning of the K-ETS market.

The Fourth National Emissions Allowance Allocation Plan, which covers the period from 2026 to 2030, introduced several improvements. First, the annual emissions cap in the K-ETS was aligned with the 2030 emissions reduction target. The emissions covered by the K-ETS will decline each year in line with the commitment to reduce domestic emissions by 40 percent (from the 2018 level) in 2030 (Table 1). Second, the share of emission allowances that are auctioned will vary between sectors, replacing the 10 percent share for all sectors during 2021 to 2025. By 2030, half of the allowances in the power generation sector will be auctioned.

However, energy-intensive trade-exposed (EITE) sectors, such as steel, petrochemicals, and semiconductors, will continue to receive 100 percent of their allowances to protect their global competitiveness. Industrial sectors that are not included in EITE will face a fixed 15 percent auction rate.

### **Boosting Renewable Energy**

For years, Seoul has prioritized renewable energy to achieve climate policy goals. Indeed, the 2050 Carbon Neutrality Scenarios published in 2021 envisaged renewables accounting for 60.9–70.8 percent of electricity generation in 2050. As noted above, the 2035 NDC set a target of at least 30 percent by 2035.

The low share of renewables in Korea partly reflects its challenging natural conditions, which make it difficult to reach the government's 2021 targets. For example, Korea's high population density may constrain the use of solar panels. According to one estimate published in 2022, generating half of the renewable energy power projected in the 2050 Carbon Neutrality Scenarios from solar panels would require an area five times the area of

the city of Seoul. The poor quality of available renewable energy resources is another constraint. Wind and sunshine conditions are weak, intermittent and variable, and their energy content is low. Wind power generation is possible for only six hours a day on average and solar power generation for only two hours a day. Steady sunshine is particularly scarce during the monsoon season of June and July.

Maintaining a stable electricity supply based primarily on renewable energy would require major innovations to secure sufficient supply flexibility, improved energy storage systems, and smart operating technologies.

## **Conclusion**

Achieving Korea's objective of carbon neutrality within twenty-five years is a major challenge. The gap between Korea's peak in GHG emissions in 2018 and 2050 is short compared to the sixty years it would take the European Union to achieve its emissions goal. It requires a comprehensive plan to develop a range of renewable energy sources, but renewables alone may not be adequate to replace fossil fuels. Consequently, increased reliance on

nuclear power, which accounted for 32 percent of electricity generation in 2024, is likely to be necessary to achieve carbon neutrality.

The 2050 Carbon Neutrality Scenarios envisaged phasing out nuclear power, reducing its share to only 6–7 percent. The Lee administration has taken a pragmatic approach to nuclear power that includes ongoing utilization and life extensions of existing operational nuclear plants and moving forward with the construction of two new nuclear reactors. Nuclear power could also help meet the rising electricity demand related to AI.

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## South Korea Wants to Be a NATO Partner, Not Just a Vendor

Korean President Lee Jae Myung proposes a defense industry partnership between Korea and NATO that positions Korea as a participant in the alliance's rearmament that helps fill critical gaps in the broader Western defense industrial complex.

By Troy Stangarone

August 6, 2026



*South Korean President Lee Jae Myung attended the NATO Leaders' Summit in Ankara, Turkey, July 2026 / Source: The Blue House*



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South Korea is now the second-largest arms supplier to NATO's European members, but the sales remain a series of bilateral transactions rather than incorporated within the alliance's procurement system.

That gap may be closing, however.

Speaking at the recent NATO Summit Defense Industry Forum, Korean President Lee Jae Myung described a Korea-NATO "defense industry partnership 2.0" that positions Korea as a participant in NATO's rearmament rather than a vendor, helping fill critical gaps in the broader Western defense industrial complex. Under the partnership, Korea and NATO would jointly produce, operate, and conduct research and development (R&D) on weapons systems. He also called for joint research on emerging technologies and the alignment of standards. Additionally, Korean firms may soon enter NATO's USD 10 billion joint procurement market, and the country could become an observer in NATO's defense raw materials program.

But entering NATO's procurement system

from the same as a participant



rearmament— the accumulated sustainment relationship that European suppliers have built over decades. Whether Lee’s proposal changes that depends on which of Korea’s obstacles are procedural and which are structural.

### **NATO and European Rearmament**

Russia’s invasion of Ukraine and U.S. President Donald Trump’s reduced support for long-standing U.S. allies in NATO have pushed European nations to begin rearming. NATO members have pledged to spend 5 percent of GDP annually on defense by 2035, with 3.5 percent dedicated to core defense needs and 1.5 percent going toward related defense and security needs such as cybersecurity, infrastructure, and the defense industrial base.

European rearmament is not exclusively a function of NATO. The European Union is also taking steps to support the rearmament of member states. In 2025, the European Union agreed to support arms purchases under the Security Action for Europe (SAFE) fund, which established EUR 150 billion (USD 173 billion) in loans for member states to engage in large-scale

defense procurements. SAFE complements the existing European Defense Fund (EDF), which supports collaborative defense research.

Korea is not eligible for the EDF, but it formally applied to participate in the SAFE program last year. While non-EU members are limited to supplying only 35 percent of components for purchasing weapons systems, Korea's status as a Security and Defense Partner makes it eligible for a separate agreement that could lift those limits. If approved, Korea would be well-positioned to partner with major European defense firms and compete for additional contracts.

#### **IP4 Arms Exports to NATO Members**

Although European rearmament efforts emphasize internal procurement to strengthen the continent's defense industrial base, NATO members also purchase weapons from the Indo-Pacific Four (IP4): South Korea, Japan, Australia, and New Zealand.

Japan historically prohibited the export of lethal arms but lifted those restrictions earlier this year as part of a U.S. call that

allies take a greater role in providing security in the Indo-Pacific. Under the new guidelines, Japan may export lethal weapons to seventeen countries that have signed defense equipment and technology transfer agreements, including several NATO members. Currently, Japan produces and sells Patriot missiles to the United States and is a partner with the United Kingdom and Italy in the development of a sixth-generation fighter jet. While Japan's current footprint as an exporter to NATO is limited, it is expected to grow with the lifting of export restrictions.

Australia has a longer history of exporting weapons to NATO members. It exports armored vehicles such as the Boxer Heavy Weapon Carrier to Germany and the Bushmaster to the Netherlands and the United Kingdom. It also exports digital Lance turrets to Hungary, high-energy anti-drone systems to the Netherlands, and an Over the Horizon Radar system to Canada. Through NATO's Prioritized Ukraine Requirements List, Australia also provided Ukraine with tactical air defense radars, combat equipment, and munitions.

As a small arms exporter overall, New Zealand exports a relatively small amount of arms to NATO members. The largest amount goes to the United States, with token exports of less than half a million to NATO members such as the United Kingdom, Turkey, Italy, Bulgaria, and a few others.

### **Korea's Existing Arms Exports to NATO**

Europe has become the world's largest arms importer. According to the Stockholm International Peace Research Institute (SIPRI), Europe accounted for 33 percent of all global arms imports between 2021 and 2025.

Despite the absence of a formal NATO procurement agreement, Korea has a robust arms trade relationship with the alliance's European members. Korean firms were the second-largest exporters of arms to NATO's European member states, accounting for 8.6 percent of arms imports over the most recent period in SIPRI's data. This remains far behind the United States, however, which accounted for 58 percent of Europe's arms imports.

Korean arms exports are highly concentrated in Poland, accounting for almost half of Korea's arms exports in recent years to European NATO member states. Top export items include K2 Black Panther tanks, the K9A1 Thunder self-propelled howitzers, K239 Chunmoo rocket launchers, "Legwan" combat vehicle, and the FA-50 training and light combat aircraft.

Norway is another significant importer of Korean arms. It imports the Chunmoo rocket launcher, the K10 armored ammunition resupply vehicle, and the K9 howitzer. The same howitzer has also found buyers in Estonia, Finland, and Romania. Romania imports the K10 armored ammunition resupply vehicle, while Estonia purchases the Chunmoo rocket launcher.

### **Market Risk and Opportunity Across NATO**

European rearmament presents opportunities for Korean defense contractors to expand their sales in Europe, something the Lee administration is targeting with its proposal to deepen cooperation with NATO in areas related to the defense industrial base.

Korea's failure to win Canada's recent submarine contract, however, highlights some of the challenges Korean defense firms face in the broader NATO market. Chief among them is a lower level of interoperability with NATO standards. Among Korean defense contractors, only Hyundai Rotem's K2 battle tank, combat engineering vehicle, and armored recovery vehicle meet NATO standards. Securing NATO contracts will also require increased joint partnerships and deeper strategic alignment with NATO.

Deeper defense industrial cooperation through joint production, operation, and R&D on weapons systems offers pathways toward greater interoperability. It would also require Seoul to align more closely with NATO on security priorities. If Korea and NATO are able to deepen defense industrial cooperation, it would not only expand opportunities for Korean defense firms but help to fill some of the gaps among U.S. allies exposed by the wars in Ukraine, Gaza, and Iran.

Taken together, NATO's rearmament needs, Europe's expanding procurement mechanisms, and the growing role of Indo-Pacific suppliers create a strategic

opening for Korea. Seoul's push for deeper defense industrial cooperation with NATO through joint production, R&D, and procurement access would help address interoperability challenges while positioning Korean firms to compete more effectively in Europe's rapidly evolving defense market.

If these initiatives advance, Korea could become an increasingly important contributor to transatlantic security and a key partner in strengthening the Western defense industrial base.

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