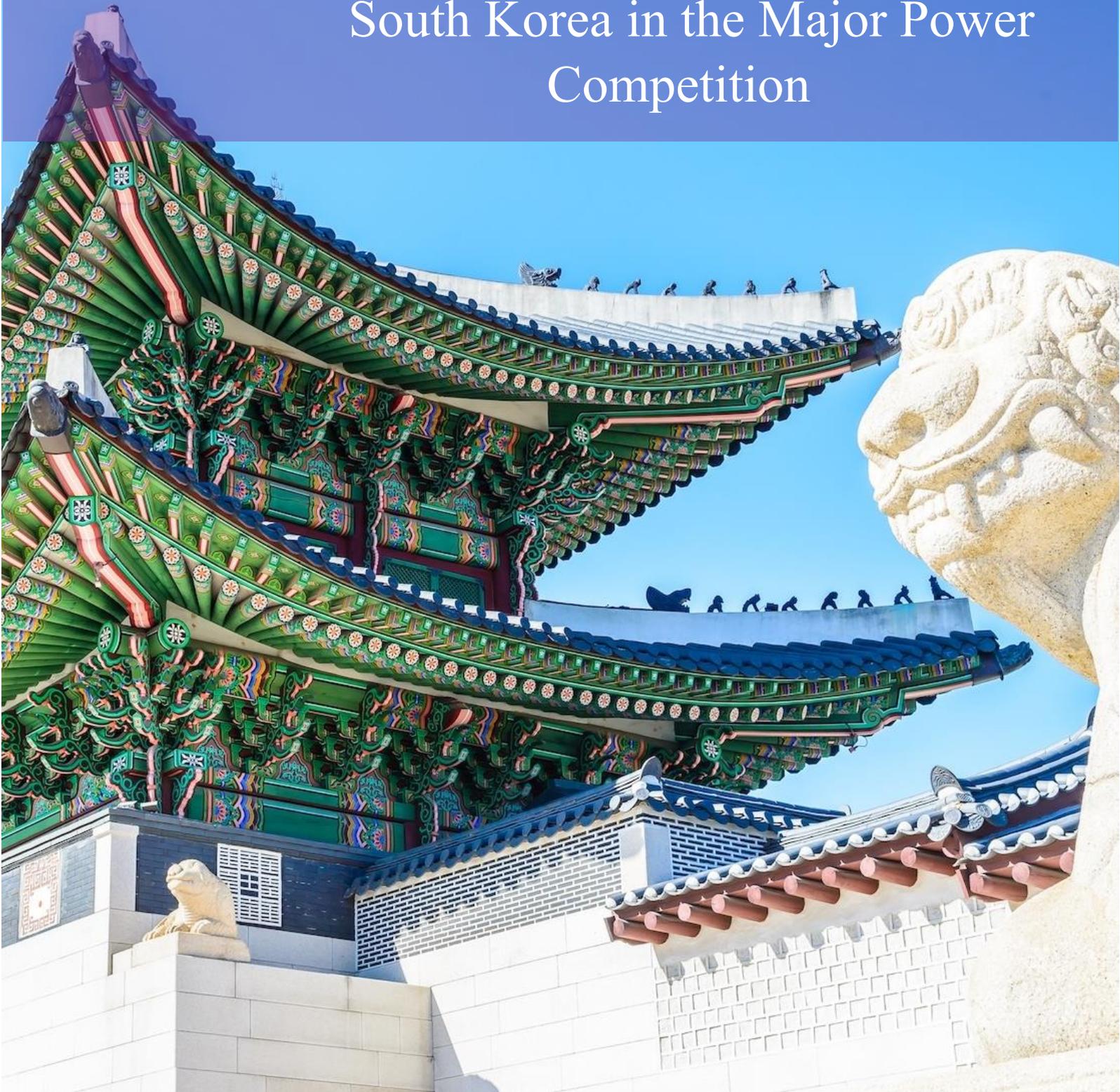


The Quest for Autonomy

South Korea in the Major Power Competition



STRATEGIC ANALYSIS REPORT

DECEMBER 2025

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The Quest for Autonomy. South Korea in the Major Power Competition

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Map of the Korean Peninsula ([National Geographic Information Institute](#))

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EXECUTIVE SUMMARY

Facing an increasingly uncertain scenario, the Korean Peninsula is witnessing the multiplication of international actors in the area. With the presence of, not only North and South Korea, but also regional and global actors as Japan, Taiwan, China, Russia and the US, the situation of the ROK is delicate and requires an analysis at the national, regional and international level.

First and foremost, to understand the position of South Korea in the international arena, we must study its national power from within. Several changes have modified internal equilibriums and will generate challenges and opportunities. Firstly, the demographic decline of the ROK—its TFR stands at 0.73— will have consequences on the economy, with an unbalanced welfare state in the long run and increasing government debt; on defense, facing a decrease of 180,000 men by 2040; and on politics, eroding the democratic legitimacy in an effect proper of “aging democracies.” Immigration has increased in the past years, though the arrival of the DPK into power may contain expansions of visas under the previous administration. Secondly, political instability is expected to remain in the medium term. President Lee now holds the majority in the National Assembly—unlike former President Yoon—, but he has also been a contributor to polarization in the past years. Thirdly, though facing increasing challenges, the ROK’s soft power strategy is expected to continue in the medium term, thanks to public-private joint efforts. Lastly, previous years have seen greater government support to the semiconductor and AI industries. Pressure from international competition is increasing and this has led to problems in terms of talent shortage and continued innovation. The ROK government has acknowledged it and taken considerable steps.

When it comes to the relationship between the DPRK and the ROK, President Lee has inaugurated his term with a conciliatory approach. He proposes what he calls the “END Policy”, i.e. exchange, normalization and denuclearization. Though maybe not with the scale of the previous Sunshine Policy, we expect to see different trust-building measures in terms of culture or humanitarian aid. Nevertheless, the North Korean attitude will foreseeably continue to be of hostility. This is to be understood in the context of multiplication of actors. On the one hand, both facing international isolation, Russia and the DPRK have moved closer in the past years, even signing a mutual defense treaty in

2023. North Korea's help in the Ukraine War may be compensated with military technology. Additionally, broken isolation increases the leverage of Pyongyang in negotiations and reinforces internally its regime, whose succession is quite ensured. This situation heightens the risks of ground skirmishes in the medium term, more so if South Korea decides to adopt a more confrontational stance, as our scenario construction on the prospects for ROK-DPRK relations demonstrates. On the other hand, the return of Trump to the White House introduces a new actor to the Peninsula. He will probably push for the denuclearization of the DPRK and continue with personal meetings with Kim Jong-un.

Regarding the role South Korea plays in the East Asian scenario, we consider three main actors. When it comes to the US, the main issues are Trump's tariffs and the future of the US security umbrella. On the one hand, tariff negotiations are still ongoing, though it seems they will soon culminate. The ROK government has shown interest in the Japanese deal. However, for the moment the deal consists only of investments and 15% tariffs. On the other hand, regarding defense, scenario construction allows us to affirm that continuous US commitment with increased South Korean autonomy is to be expected for the following 20 years. The development of a nuclear program by South Korea is unlikely. Secondly, regarding the PRC, its economic relations may have turned into dependence and negative trade balances were recorded in 2023. Adding this to other less important disputes, the ROK could finally overcome its hedging strategy of "commerce with China; security with the US" and start veering decisively towards the US. This, however, excludes for the moment a Korean intervention in case of increased tensions in the Taiwan Strait. Lastly, the new administrations of Lee and Takaichi both have expressed their willingness to deepen their ties. In fact, some steps have been taken by the Japanese side—PM Takaichi renounced her visit to the Yasukuni Shrine this autumn. It is true that the same parties are in power as in 2019-2020, when the ROK-Japan trade war took place. Nevertheless, the context is quite different and the DPRK's and PRC's strengthening may solidify once and for all the relationship between these two countries

INTRODUCTION

The last twenty-five years have been of great change for the world. The balance of power in the world inherited from the Second World War and the Cold War has changed dramatically and the unipolar world in the 1990s led by the United States has vanished. Nowhere is this more evident than in the Indo-Pacific, where China has become a major power in the region, competing with the United States for influence and dominance. In a scenario of VUCA (Volatility, Uncertainty, Complexity, and Ambiguity), South Korea has not been an exception to it.

The Korean Peninsula being at the center of geopolitics is nothing new. In fact, it suffers the curse of being found at one extreme of Spykman's Rimland. Its strategic location has led to it being a stage for great and regional power confrontation. This was the case for much of its history for the China-Japan rivalry in East Asia: Chinese influence was always predominant until the latter half of the 19th century, when the Japanese started rising. This reached the point of an occupation by the Japanese from 1910 to 1945.

The two actors which achieved major influence in the second half of the 20th century—the US and the Soviet Union/Russia—first entered the scene in the 19th century. The aftermath of the Second World War and the Cold War were, however, their highest point of their influence on the Peninsula. It was in this context that the Korean War (1950-1953) broke out. As a result, the Peninsula was divided between a communist regime in the north, the Democratic People's Republic of Korea (DPRK), and a part-time democracy, part-time military dictatorship, Republic of Korea (ROK). In addition, the division of China in 1949 between the communist People's Republic of China (PRC) and its counterpart in the island of Taiwan, the Republic of China (ROC), has led to the multiplication of actors intervening on the Korean Peninsula.

As is evident, such a concentration of power in such a small region entails some delicate equilibriums. A small accident could lead to the outbreak of a full-scale war between the major powers in the region and the world. The shift in the American policy towards the Indo-Pacific has led to greater importance of this particular appendix of the Asian continent.

Such a delicate scenario has been recently shaken after the Martial Law crisis (December 3, 2024) and the impeachment of the then President Yoon Suk-yeol—from the People Power Party (PPP)—on December 14. These events let resurface the vulnerabilities that lie beneath the ROK’s political system but also were a demonstration of its democratic resilience. June 2025 presidential elections have resulted in the triumph of the now President Lee Jae-myung, from the Democratic Party of Korea (DPK), who praises the ‘Revolution of Light’ that overtook Yoon’s aspirations.¹ Lee’s government must now undertake the task of avoiding political instability, while maintaining South Korea’s international image of a stable democracy.

The political crisis that the ROK experiences underpins other challenges that question the main sources of South Korea’s national power. On the one hand, the economic boom that started under the authoritarian regime of Park Chung Hee (1961-1979) is long gone and South Korea faces increasingly the rise of new competitors in the technology industry. The ROK’s leadership in the markets of semiconductor and advances in artificial intelligence (AI) shall deal with the rise of other powers such as the PRC, the US, the ROC or Japan. On the other hand, South Korea has since the late 1990s been at the forefront of soft power in the world. The so-called ‘Korean Wave’ or *Hallyu* englobes music (K-pop), television (K-dramas), cosmetics (K-beauty) and other elements of Korean lifestyle. It is to be questioned whether it will be capable of continuing to exert this influence.

Thirdly, there is an even more profound issue that impacts all the other elements of South Korean national power that cannot be neglected: the demographic crisis. South Korea’s total fertility rate (TFR) is the lowest on the planet, at 0.73 (2023). An aging population usually results in problems for the stability of the welfare state, as well as a challenge for the defense of the country. It also affects the economic growth and international projection of South Korea, not to talk about the impact it has on political dynamics. As it happens in other East Asian societies, ethnic South Koreans amount to a very high percentage (95%), and migration is essentially restricted to high-skilled labor. However, given the demographic outlook, the issue of migration is still open to debate.

¹ Lee Jae-myung, “Notice Address by President Lee Jae Myung at the General Debate 80th Session of the UN General Assembly,” (New York), September 23, 2025.

When it comes to the geopolitics of the Korean Peninsula, as we have already said, the two Koreas have been divided since the armistice of 1953. There has been no peace treaty since then. Through the rest of the Cold War, relations between the two Koreas were outright hostile, with border incidents and a failed attempt by North Koreans commandos to kill South Korean dictator Park. North Korea has also been involved in terrorist activities, most notably the bombing of Korean Air Flight 858. Up to the 1989, the two Koreas sat on opposing sides of the ideological struggle, with South Korea as a valuable ally of the US in Asia, a position further cemented by its valuable contribution of troops to the Vietnam War, while North Korea was a buffer state for China and the USSR to US influence in Asia. The alliance between North Korea and these two world powers somewhat eroded after the fall of the USSR.

Talking about more recent events, the North Korean nuclear program has not decreased, instead; on the contrary, it has accelerated and manufactured missiles capable of deploying nuclear weapons, with some believed to be able to reach the US mainland. The US, the ROK's traditional ally and primary line of defense against any North Korean adventure, with US Forces Korea (USFK), acting as the main deterrent, has voiced its concerns over China as a major adversary, and since the return of Donald Trump to the White House, has speculated the idea to use those forces for defending Taiwan if China invades the beleaguered democracy, exposing South Korea to North Korean military ambitions. North Korea's closer links to Russia, especially its contribution of combat troops to fight in Ukraine adds more complexity to the already tense relationship between the two Koreas, that on more than one occasion in the 21st century has seen serious incidents that risked war between the two nations. With a North Korean military acquiring valuable experience from the war in Ukraine and the support of Moscow, the Korean Peninsula is once more a frontline of great power politics.

It is clear, therefore, that the US has been South Korea's greatest ally in the region, especially since the Korean War, where US forces were vital for the South's survival. South Korea depends greatly on the US for its defense, with South Korea hosting a considerable number of US bases and hundreds of combat troops. The US is also South Korea's second largest trading partner. Relations have somewhat soured, as the US has been eying China as a much greater threat than the DPRK, and somewhat reduced the priority of deterring it to that of countering China. The political changes in the US political leadership's approach with the rise, fall and return of Donald Trump to the White

House in 2017 and 2025 respectively have played a key role in these changes. An issue that has become controversial is that of tariffs, as Trump has taken a more protectionist approach to American businesses. The US, similarly to what has happened in Europe, has been increasing pressure for its allies to contribute more resources to defense, sparking fears of an American withdrawal.

Another important actor is the People's Republic of China. It is South Korea's greatest trading partner, with both importing and exporting goods to the other and the existence of the China-South Korea Free Trade Agreement (CKFTA). However, the relationship is complicated due to the close relationship of the North Korean regime and China, not helped by Beijing's uneasiness with the US presence in the region. While the Democratic Party tends to be more pragmatic in its relationship with China, the People's Power Party tends to follow more closely the US policy towards Beijing, which in recent years has been characterized by intense rivalry.

Finally, Japan, a major trading partner in the region, but with a complex history dating back to the Japanese occupation of Korea and the issue of Comfort Women, makes the situation more complex, despite the two facing threats from North Korea's nuclear program. The Dokdo-Takeshima Island dispute is another thorny issue. This is amplified whenever the Democratic Party comes to power in South Korea, which tends to amplify the historical woes with Japan. The only asset maintaining a semblance of alliance between the two nations is the US, which plays an essential role in their security.

Having assessed the main elements that intervene in the ROK's current geopolitical situation on the planet and in the region, we will now explain the sections that will be included in our report. It will begin, firstly with a chapter describing South Korea's national power. Given that national power depends on many factors that are not susceptible to change, we will only focus on those which are clearly suffering changes. This includes elements of latent power, such as its demographic crisis, as well as elements of applied power. It is the case of social cohesion and political stability after the Martial Law crisis and the change in presidency, the continuity of South Korea's soft power and, finally, Seoul's economic power. The second chapter will take a step further to cover the geopolitics of the Korean Peninsula. This will imply analyzing the relationship between the DPRK and the ROK and the security situation in the Peninsula. We will also focus particularly on two external actors that play a significant role in this issue: Donald Trump and Russia. The third and final chapter will concern the role South Korea plays within

East Asia. It will, therefore, include different studies on the ROK's relationship with the US, China, Taiwan and Japan.

To enrich our strategic analysis report, we will employ several techniques of strategic foresight. This will include the construction of different future scenarios for the evolution of the relationship between the DPRK and the ROK, as well as for the future of USFK in South Korea, and, more generally, the ROK's permanence under the US security umbrella. A map of actors to show the agents involved in this last issue will also be included.

Few nations in the history of the world have seen such major changes in such a small space of time as South Korea. From an occupied nation by Japan in the early 20th century to a major frontline of the Cold War in 1950, to one of Asia's strongest economies and democracies, South Korea achieved in little time what other nations took decades to achieve. Its economic growth has cemented its position as one of the Asian Tigers. As we have seen, however, in recent years it has faced new challenges, byproducts of its success in society or as a result of lingering threats from its creation. South Korea is a story of triumph amidst adversity and difficulties of a changing world in the aftermath of the Second World War.

1. CHALLENGES TO SOUTH KOREAN NATIONAL POWER

The national power of a country depends largely on two variables: latent power and applied power—its physical attributes and the use the institutions give to it. This first section addresses four domains where the ROK’s national power is facing important changes. The demographic decline puts a strain on its economy, defense capabilities and may erode democratic legitimacy, while migration remains as a possible but weak solution. Another issue at stake is the political stability of South Korea: even though it has softened, polarization is still there. Opportunities are still present in the realm of soft power, and the AI and semiconductor industries. However, competition by China, Japan and the US is rising and may pose risks in the field of talent attraction and continued innovation.

1.1. A PROBLEM OF LATENT POWER: THE DEMOGRAPHIC CHALLENGE

As the majority of post-industrial societies, South Korea’s demographic outlook is concerning. In fact, it is among the worst cases: it was one of the five countries in 2024 with a total fertility rate (TFR) below 1.0 on the planet, along with China, Taiwan, Ukraine and Singapore. Particularly, its TFR is the lowest in the world at 0.73 children per woman. It has been below 2.1, the replacement level, since 1984.² The ROK’s life expectancy at birth has increased continuously since 1960. Back in that year, it was 53.8 years. In 2023, it stood at 83.4 years, among the highest ciphers on Earth.³ The demographic decline has been reflected even in population decreases, registered in 2021 and 2022, in a country that held more than 51.75 million inhabitants in 2024.⁴ In summary, there is no doubt that this topic is one of the main challenges that ROK currently faces.

² United Nations, *World Fertility 2024* (United Nations, 2025).

³ World Bank Group, “[Life Expectancy at Birth, Total \(Years\) - Korea, Rep.](#),” World Bank Open Data, accessed October 19, 2025,

⁴ World Bank Group, “[Population Growth \(Annual %\) - Korea, Rep.](#),” World Bank Open Data, accessed October 19, 2025; World Bank Group, “[Population, total - Korea, Rep.](#),” World Bank Open Data, accessed December 9, 2025.

The causes of this situation are multiple, many of which are shared with other East Asian societies. Firstly, South Korea's working culture is very demanding and work-life balance is quite lacking. Doing extra hours is the norm. For instance, in 2024, a Korean worker invested an average of 1865 hours annually in their job, while the OECD average is at 1736 hours. This figure, though, has decreased in recent years: in 2010, the average worker in Korea dedicated 2136 hours annually to it.⁵ Secondly, there is an "education fever" among Koreans; in other words, families favor their children's access to highly competitive universities so that they can get prestigious jobs in the future.⁶ This is particularly notorious for the so-called SKY universities: Seoul National University, Korea University and Yonsei University. Thirdly, we can point out the housing problem in the ROK. The Korean society is a highly urbanized one: the share of the population living in urban areas amounted to 83 % in 2023.⁷ Other factors contributing to the housing crisis are the weight of single-person households (35.3 % in 2023)⁸ and of elderly households (23.1 % in 2021). It is projected that by 2052, more than a half of the households will be inhabited by people over 65 years.⁹ Finally, another important cause for the declining TFRs is gender inequality. Rapid industrialization has not changed traditional values. Therefore, it is still expected that women will take care of the children while she works, while it has been demonstrated that fertility intentions among women are higher when there is a balance in income and housework between both spouses.¹⁰

Declining TFRs and aging populations affect importantly three areas that have an impact on South Korea's national power. In the first place, it has clear effects on the economy. The ROK's working-age population peaked in 2019 and has been declining since then.¹¹ ROK's labor force currently stands at 29.7 million, while people aged more than 65

⁵ OECD, "[Average Annual Hours Actually Worked per Worker](#)," OECD Data Explorer, accessed October 19, 2025.

⁶ Thomas Anderson and Hans-Peter Kohler, "[Education Fever and the East Asian Fertility Puzzle: A Case Study of Low Fertility in South Korea](#)," *Asian Population Studies* 9, no. 2 (2013): 196–215; Kyuseok Kim, "[South Korea's Escalating Early Education Fever](#)," *Education, East Asia Forum*, April 26, 2025.

⁷ World Bank Group, "[Urban Population \(% of Total Population\) - Korea, Rep.](#)," World Bank Open Data, accessed October 19, 2025.

⁸ Statistics Korea, "[South Korea: Household Distribution by Size](#)," Statista, 2024.

⁹ Statistics Korea, "[South Korea: Share of Elderly Households 2052](#)," Statista, September 2024.

¹⁰ Lira Ahn, "[Exploring Predictors of Fertility Intention Among Dual-Earner Married Women: Using the Random Forest Method](#)," *Korean Journal of Child Care and Education Policy* 19, no. 2 (2025): 1–25.

¹¹ International Monetary Fund, *Republic of Korea: 2024 Article IV Consultation—Press Release; Staff Report; and Statement by the Executive Director for the Republic of Korea*, no. 25/41, IMF Country Reports (International Monetary Fund, 2025), 16.

account for 20% of South Korea's population.¹² There are prospects that affirm that by 2070, South Koreans working will account only for 46% of the population. At the same time, the pension system will be put at significant stress. South Korea's National Pension System will have higher expenses than revenues by 2041, according to some estimates. This situation may end up increasing the ROK's government debt.¹³

In second place, the decreasing young population affects the ROK's military power. The main source of manpower is conscription. Currently, males from 18 to 35 years must enroll in the military for 18 to 21 months, depending on the branch they choose. However, the demographic decline has affected it severely: in the past six years, the 20-year-old male population has decreased by 30%, while its military has downsized by 20%. ROK's Ministry of National Defense affirms that there is a shortage of 50,000 troops.¹⁴ Additionally, Seoul projects that by 2040, the military will have shrunk from 450,000 to 270,000 troops due to male shortage, while North Korea is expected to maintain its Army above the million figure.¹⁵

Finally, the increase in the elderly population in society has its effects on politics. In May 2025, the +70 years old was the only age group that supported by majority the People's Power Party (PPP), the party of former president Yoon Suk-yeol. Support for the Democratic Party of Korea (DPK) is predominant in the rest of the age groups, particularly among the 40-year-old, where it is the preferred option for 72% of the survey respondents.¹⁶ That age group includes the generation that have lived since their childhood under the democratic system instituted in 1988. It is unsure whether this support for these parties is generational or if it will change when those cohorts age even further. In any case, the greater weight of the elderly within the electorate may tilt politicians towards favoring measures such as pensions while neglecting the youth.¹⁷ In addition, the lack of generational pluralism may diminish the legitimacy of the political

¹² World Bank Group, "[Labor force, total - Korea, Rep.](#)," World Bank Open Data, accessed December 9, 2025; KOSIS, "[Share of population aged 65 years and older in South Korea from 2000 to 2024](#)," Statista, April 2025.

¹³ International Monetary Fund, *Republic of Korea: 2024 Article IV Consultation*, 16, 26, 54.

¹⁴ Jack Kim, "[South Korea's Military Has Shrunk by 20% in Six Years as Male Population Drops](#)," Asia Pacific, *Reuters*, August 10, 2025.

¹⁵ Eun-ji Bahk, "[Korea's Military Faces Deepening Troop Shortage Due to Plummeting Birthrate](#)," Southkorea, *The Korea Times*, September 21, 2025.

¹⁶ Gallup Korea, "[South Korea: Political Parties Preferences by Age 2025](#)," Statista, May 2025.

¹⁷ Timothy W. Martin and Dasl Yoon, "[Older Voters Are Taking Over in the World's Wealthy Democracies](#)," World, *Wall Street Journal*, April 9, 2024.

system, as studies on “aging democracies” have demonstrated.¹⁸ Similarly, the increasing age gap between the politicians and the youth generates less sympathy for democracy among them.¹⁹

There are three main possible solutions for the demographic challenge: financial support, social support, or immigration.²⁰ Within this last point, there has been significant change in the last decades. In 1990, the international migrant stock in the ROK was 18,000, while in 2024, it is 1.8 million. Nowadays, migrants constitute 3.5% of the Korean society.²¹ At the end of 2024, the number of foreign workers reached a million.²² Even though South Korea has been characterized as a strongly ethnic and contrary to migration society, this sentiment seems to have been mitigated as the demographic crisis lurks.²³ Additionally, several landmarks across the 2000s have made the ROK the most open when compared to its East Asian neighbors.²⁴

It must be understood, though, that migration received until now has been majorly of high-skilled workers. Under the government of Yoon Suk-yeol some requirements were eased for international immigrants and the scope of E-9 visas—those applying for unskilled employment—was expanded.²⁵ There was even a project for the creation of an Immigration Agency to alleviate declining TFRs. The change of government in the past months has halted this project. With the DPK in power, more nationalistic and closer to Korea’s working class,²⁶ less measures regarding migration are expected.

In sum, even if the demographic crisis is urgent from the strategic point of view, it is not a priority for Koreans: only 5% affirmed that measures addressing it were a political

¹⁸ Yosuke Buchmeier and Gabriele Vogt, “[The Aging Democracy: Demographic Effects, Political Legitimacy, and the Quest for Generational Pluralism](#),” *Perspectives on Politics* 22, no. 1 (2024): 168–80.

¹⁹ Alonso Roman Amarales et al., “Age Gaps Between Political Leaders and the Public Can Undermine Support for Democracy,” preprint, May 2025.

²⁰ Chae Young Kim and Sung-Hoon Chung, “[Demographic Transition in South Korea: Implications of Falling Birth Rates](#),” *Clinical and Experimental Pediatrics* 67, no. 10 (2024): 498–509.

²¹ United Nations Department of Economic and Social Affairs, Population Division, *International Migrant Stock 2024* (2024).

²² Aisylu Akhmetzianova, “[No. of Foreign Workers Hits 1M, 30% Earn KRW 3M Monthly](#),” *Korea.Net: The Official Website of the Republic of Korea*, December 18, 2024.

²³ Jung-Eun Oh et al., *Migration Profile of the Republic of Korea* (IOM Migration Research and Training Centre, 2011), 123.

²⁴ Erin Aeran Chung, *Immigrant Incorporation in East Asian Democracies* (University Press, 2020), 3, 64–69.

²⁵ OECD, *International Migration Outlook 2024*, International Migration Outlook (OECD Publishing, 2024), 226.

²⁶ Min-ho Jung, “[Why Korean Conservatives Are More Open to Immigration than Liberals](#),” *The Korea Times*, February 13, 2024.

priority in a poll.²⁷ The demographic outlook is, in any case, worrying since it will modify the equilibrium required for the viability of the welfare state, reduce the amount of troops and erode the legitimacy of democratic procedures among the youth. Despite measures implemented recently, the shift in the ROK's government inclines us to affirm that migration will not be a solution, at least in the short term. It is expected, still, that high-skilled migration will continue to increase or at least to remain stable.

1.2. POLITICAL STABILITY IN THE POST-MARTIAL LAW YEARS

South Korea was on the news all over the world on December 4, 2024. The preceding day, at 10:23 P.M., the then President Yoon Suk-yeol declared martial law. He argued that North Korean forces had infiltrated the DPK. During the following hour, the police and the military started blocking the entrance to the National Assembly. Some members of the parliament got to enter the building and voted at 1:00 A.M. on the annulment of martial law. At dawn, President Yoon lifted martial law. On December 7, there was a first impeachment against Yoon. It failed. It was achieved the following week, on December 14, with the vote in favor of 204 MPs, including 12 PPP representatives. The judicial phase of the impeachment triggered at that moment. There was a failed attempt to arrest Yoon on January 3, 2025. The Corruption Investigation Office finally detained him on January 15. The impeachment process culminated on April 4, when the Constitutional Court ruled against Yoon. Presidential elections were called for June 3. Current President Lee, from the DPK won by 49.42% of the votes. Kim Moon-soo, the PPP candidate, got 41.15% of the ballots. In the meantime, three acting presidents had succeeded in six months.²⁸ Yoon's actions were reflected in international indexes. For instance, in The Economist's *Democracy Index 2024*, the ROK ranked 32nd, having decreased 10 positions. Now reclassified as a "flawed democracy," it was among the top ten downgrades.²⁹

Several factors have led to this situation. Firstly, Yoon had been elected in 2022 by a margin of 0.73%, the smallest recorded difference between two leading candidates in

²⁷ Gallup Korea, "[South Korea: Political Priorities 2025](#)," Statista, April 2025.

²⁸ Michael Lee, "[Four Months of Turmoil: Timeline of Yoon's Declaration of Martial Law and the Aftermath](#)," *Korea JoongAng Daily*, April 4, 2025; Adolfo Arranz et al., "[South Korea's Short-Lived Martial Law: How It Unfolded and What's next](#)," *Reuters*, December 4, 2024; Seong-uk Baek, "[Declaration of Martial Law in South Korea: A Threat to Democracy](#)," *The Lancet* 405, no. 10474 (2025): 195.

²⁹ The Economist Intelligence Unit, [Democracy Index 2024: What's Wrong with Representative Democracy?](#) (2025), 71.

ROK's presidential election history.³⁰ His popularity was never high: after three months of mandate, the number of people disapproving of his performance was greater than those approving of it. By the last week of November 2024, his approval rate was 19%, while voters disapproving of him reached the figure of 72%.³¹ Secondly, legislative action was at an *impasse*, since the DPK held the majority in the National Assembly since the 2020 legislative elections. Yoon's initiatives were constantly paralyzed: for example, the medical reform.³² Thirdly, Yoon's wife was suspected of being involved in several dubious actions such as stock manipulation, academic plagiarism and the acceptance of a Dior handbag.³³ These accusations were particularly serious, since one of the main objectives of Yoon's presidency was to fight against corruption. Finally, all these factors must be understood in the context of increasing polarization and economic deceleration.³⁴

Understanding the history of the ROK's democracy is useful to comprehend recent events. The transition from the military regime under Chun Doo-hwan to democracy in 1987 was the result of an agreement between reformists within the regime and moderate opposition groups. As it tends to happen in many third-wave democracies, certain traces of previous authoritarian regimes remain.³⁵ Several problems have been pointed out that make the complete consolidation of a democratic system difficult: the low level of institutionalization of political parties, excessive personalism, clientelism and regional divisions within the ROK.³⁶ Many of these problems are related to Confucian culture in Korea: some authors even argue that "Koreans operate with Western hardware and Confucian software."³⁷

In this line, South Korean democracy has been accused of having a poorly developed civil society. However, last year's events seem to contradict this affirmation: its democratic

³⁰ Youngmi Kim, "The 2022 Presidential Election in South Korea: The Politics of Resentment and Revenge Confirms Older Trends and Cleavages and Reveals New Ones," *Georgetown Journal of Asian Affairs* 8 (2022): 14.

³¹ Gallup Korea, "[Yoon Suk Yeol Approval Rating South Korea 2024](#)," Statista, December 2024.

³² Baek, "Declaration of Martial Law in South Korea."

³³ Hyo-jin Lee, "[How Scandals Surrounding First Lady Contributed to Yoon's Downfall](#)," *The Korea Times*, December 16, 2024.

³⁴ Yeilim Cheong and Stephan Haggard, "[Political Polarization in Korea](#)," *Democratization* 30, no. 7 (2023): 1215–39; Hyug Baeg Im, *Democratization and Democracy in South Korea, 1960–Present* (Springer Singapore, 2020), 65–66.

³⁵ Seungwoo Han, "[Martial Law, Democratic Erosion, and Democratic Resilience in South Korea](#)," *Asian Journal of Comparative Politics*, August 25, 2025, 3.

³⁶ Im, *Democratization and Democracy in South Korea, 1960–Present*, 135–48.

³⁷ Im, *Democratization and Democracy in South Korea, 1960–Present*, 214.

resilience has been put to test and succeeded. The declaration of martial law brought back memories of the repression under Rhee, Park and Chun during the second half of the 20th century. It was the 17th time martial law had been declared in South Korea since 1948, and it was the first time in 45 years.³⁸ In fact, the speech given by Yoon was very similar to the one given by the acting president after Park's assassination in 1980.³⁹ Ultimately, Koreans feared the return of the Army into a power, a *rara avis* in Korean history, since Confucianism promotes civilian control.⁴⁰ The collaboration between the legislative, the judiciary, and civil society, as well as international support was essential in overturning Yoon's martial law.⁴¹

After June elections, Lee has taken some measures to ensure political stability, related mainly to the Army. A parallel could be made to Kim Young-sam's military reform.⁴² President Lee has completely reshuffled the upper echelons of the ROK Armed Forces. Such a sweep had only occurred once in history: in 2022, by President Yoon. That movement was heavily criticized as political interference. Lee's measures are aimed in principle to restore the Armed Forces neutrality.⁴³ At the same time, the fact that the President holds the majority at the National Assembly limits the possibility of a legislative block, as had happened under Yoon's presidency. Nevertheless, it must be said Lee equally contributed to the polarization of South Korean society, both in the 2022 and in the 2025 elections.⁴⁴

As a way to end this section, we must consider that the figure of the president in Korea is the second strongest in Asia.⁴⁵ His profile is central to ROK's politics. Lee's case is particular. Holding the control of the National Assembly ensures some political stability in the short term, but polarization is not easily removed, even worse if one of its contributors is currently in power. Yoon's failure to impose martial law and his ulterior

³⁸ Yeon-woo Lee, "[History of Korea's Martial Law Declarations](#)," *The Korea Times*, December 4, 2024.

³⁹ Laney Bahan, "[Making Sense of South Korea's Senseless Martial Law Declaration](#)," *Asia-Pacific Journal: Japan Focus*, December 28, 2024.

⁴⁰ Im, *Democratization and Democracy in South Korea, 1960–Present*, 211.

⁴¹ Han, "Martial Law, Democratic Erosion, and Democratic Resilience in South Korea," 6.

⁴² Im, *Democratization and Democracy in South Korea, 1960–Present*, 135.

⁴³ Sukjoon Yoon, "[President Lee's Reshuffle of the South Korean Military](#)," *The Diplomat*, September 10, 2025.

⁴⁴ Kim, "The 2022 Presidential Election in South Korea: The Politics of Resentment and Revenge Confirms Older Trends and Cleavages and Reveals New Ones," 15–17; Gi-wook Shin, "[Is South Korea's New President Good for Democracy?](#)," *Journal of Democracy*, June 2025.

⁴⁵ Yuki Asaba, "[Presidentialism in Korea: A Strong President and a Weak Government](#)," in *Presidents, Assemblies and Policy-Making in Asia*, ed. Yuko Kasuya (Palgrave Macmillan UK, 2013), 44.

impeachment was a clear demonstration of democratic resilience. Yet, being in principle a healthy democracy, it got further than it should have. Therefore, political instability, although smoothed, will not leave the scene at least in the medium term.

1.3. THE IMPACT OF THE “KOREAN WAVE”

One of the most well-known elements of the ROK is its soft power policy. Since the 1990s, South Korea has been a cultural power in Asia, a situation that has expanded to the whole world in the last decade. This phenomenon is known as *Hallyu* or “Korean Wave.” Broadly speaking, we could differentiate two different phases in this process. On the one hand, between the late 1990s and the 2000s, Korean TV shows (K-dramas) grew in popularity in East and Southeast Asia. The show *Winter Sonata* may be its greatest example. On the other hand, since the late 2000s, the Korean government saw an opportunity within the Korean cultural industry and started promoting it greatly. *Hallyu* turned into a global phenomenon in 2012 with PSY’s *Gangnam style*. This second phase is characterized also by the primacy of Korean music (K-pop).⁴⁶

The results of this strategy are clear: currently, South Korea holds 12th place in the Brand Finance Soft Power Index.⁴⁷ Additionally, in a 2024 poll across 28 countries, 51.4% of the respondents answered that K-pop was “very popular” in their country.⁴⁸ Another way of showing the increased cultural relevance of ROK is by analyzing its intellectual property exports: they tripled in the decade 2014-2024.⁴⁹

It must be underlined that the Korean Wave has evolved from being “a market-driven phenomenon to a formalized component of Korea’s global strategy.”⁵⁰ Indeed, developing a soft power strategy is typical of middle powers, which lack the material capabilities for a hard power strategy,⁵¹ as it is the case for the ROK. There are many institutional mechanisms that have helped in the construction of South Korea’s soft power strategy, namely the Presidential Council for Nation Branding (2009-2013). There are

⁴⁶ Agapi E. Matosian, “[The Key Components of South Korea’s Soft Power: Challenges and Trends](#),” *RUDN Journal of Political Science* 23, no. 2 (2021): 282–83; Dal Yong Jin, *New Korean Wave: Transnational Cultural Power in the Age of Social Media* (University of Illinois Press, 2016), 5.

⁴⁷ Brand Finance, ed., [Global Soft Power Index 2025](#) (Brand Finance, 2025).

⁴⁸ KSTAT Research, “[K-Pop Popularity Worldwide 2024](#),” Statista, March 2025.

⁴⁹ Jihoon Lee, “[South Korea Turns to Culture in Search of next Fillip for Growth](#),” *Media & Telecom, Reuters*, August 21, 2025.

⁵⁰ Cristiane Vanessa Alves de Oliveira, “[The Hallyu Wave as a Strategic Soft Power Tool: South Korea’s Cultural Diplomacy in the 21st Century](#),” preprint, SciELO Preprints, July 24, 2025, 2.

⁵¹ Matosian, “The Key Components of South Korea’s Soft Power,” 285.

many other governmental agencies such as the Korea Culture and Information Service (KOCIS), the Korean Institute of Culture and Tourism (KCTI) or the Korean Art Management Service (KAMS).⁵² Many of these are dependent either on the Ministry of Culture, Sports and Tourism or the Ministry of Foreign Affairs.

Some of these institutions have a real global extent. King Sejong Institutes (KSI)—named after Sejong the Great, the king of Joseon who invented Hangeul⁵³—are in charge of teaching Korean language and diffusing Korean culture. There are 252 KSI centers around the planet: the two countries that concentrate the highest number are the People’s Republic of China and Vietnam, both with 21, followed by Japan (16) and the US (13).⁵⁴ On the other hand, the Korea Creative Content Agency (KOCCA), an organization aimed at promoting content business in ROK, has delegations in 22 different countries.⁵⁵

However, what really stands out in ROK’s soft power strategy is the weight of non-state actors; in other words, it would not have been possible without the collaboration of the Korean cultural industry, characterized precisely by its dynamism. Global phenomena such as the groups BTS or Blackpink and the audiovisual productions *Parasite*, *Squid Game* or *K-pop Demon Hunters* take place thanks to the content companies that promote them. The government can support existing initiatives but very difficultly can promote new projects out of nowhere. An example of the way it supports it, in addition to financial investment, is the “Visit Korea Year (2023-2024)” campaign, which included exemptions of K-ETA visas for 22 countries.⁵⁶

The persistence of ROK’s position as a major cultural power faces three main challenges. Firstly, its main products are distributed by networks that are not owned by South Korean companies: YouTube, Netflix, Spotify and TikTok are from the US, Sweden and China, respectively.⁵⁷ This dependence is not suitable for such a valuable asset, though creating a Seoul-based platform would hinder its global expansion. Secondly, as cultural content, Hallyu requires continuous innovation, while maintaining certain continuity in order to

⁵² Aybala Lale, “[The Soft Power of South Korea](#),” *Asya Studies* 4, no. 13 (2020): 67.

⁵³ Michael J. Seth, *Korea: A Very Short Introduction* (Oxford University Press, 2020), 38–39.

⁵⁴ King Sejong Institute Foundation, “[KSIF - Designation and Operation of KSIs](#),” King Sejong Institute Foundation, accessed October 21, 2025.

⁵⁵ Korean Creative Content Agency, “[KOCCA](#),” accessed October 21, 2025.

⁵⁶ Embassy of the Republic of Korea to the Republic of Singapore, “[Temporary Exemption of K-ETA for 22 Countries/Regions \(as of 01 April 2023\)](#),” Embassy of the Republic of Korea to the Republic of Singapore, March 29, 2023.

⁵⁷ Oliveira, “The Hallyu Wave as a Strategic Soft Power Tool,” 15.

ensure its long-term existence.⁵⁸ Finally, there have already been some reactions against the Korean Wave. Anti-Hallyu sentiment already appeared in China and Japan in the mid-2000s for different reasons. In the case of China, it was due to the economic competition with local cultural products, while in Japan it was more associated with nationalistic attitudes of certain extreme groups.⁵⁹ More recently, resistance to Korean cultural products have also taken place in Egypt, Saudi Arabia, Iran, Nigeria or Kenya, either due to its incompatibility with Islamic values or due to accusation of cultural imperialism.⁶⁰

In any case, there are some undeniable truths behind the ROK's soft power strategy: 30 years ago, "Korea" was mainly associated with the Korean War or the North Korean regime, while currently it is more linked to expressions as "K-pop" or Oscar-winning films as *Parasite*.⁶¹ It has also fostered notably tourism to South Korea: in 2023, 72.5% of foreign tourists argued Hallyu-related motives for their visit.⁶² We must not forget, though, that soft power does not necessarily bring either security or money. Even if it may not seem the case, the main revenue from Seoul's exported cultural goods is still a less well-known sector of Hallyu: videogames.⁶³

To summarize, as a middle power, Hallyu is an essential element of the ROK's national status. Its success is the result of a perfectly synchronized public-private partnership with global-reaching consequences, but it is subject to certain challenges: the lack of Korean-owned platforms for its distribution, the tensions between novelty and continuity, and the rise of anti-Hallyu movements. The strategy has been very effective until now—and we consider it will continue to be in the medium term—but focusing on it should not neglect more important aspects of national power such as economics or the military. These two will be analyzed in following sections.

⁵⁸ Oliveira, "The Hallyu Wave as a Strategic Soft Power Tool," 16.

⁵⁹ Seungyun Oh, "Hallyu (Korean Wave) as Korea's Cultural Public Diplomacy in China and Japan," in *Korea's Public Diplomacy*, ed. Kadir Ayhan (Ministry of Foreign Affairs, Republic of Korea, 2016), 184; Jayson Makoto Chun, "When Cultural Exchanges Go Awry: Korea Japan Relations and Popular Culture," *Georgetown Journal of International Affairs* 26 (2025): 117–23.

⁶⁰ Oliveira, "The Hallyu Wave as a Strategic Soft Power Tool," 13.

⁶¹ Paula Fernández, "["Corea es la puerta para que Argentina se acerque al mercado asiático". Kim Il-jung, Director General de KOCCA](#)," *Reporte Asia*, November 19, 2024.

⁶² Oliveira, "The Hallyu Wave as a Strategic Soft Power Tool," 9.

⁶³ Jimmyn Parc, "["Korea's Cultural Exports and Soft Power: Understanding the True Scale of This Trend](#)," preprint, Academia.edu, August 9, 2022; Lee, "South Korea Turns to Culture in Search of next Fillip for Growth."

1.4. SOUTH KOREA’S ECONOMIC POWER CONTESTED

Lee’s government priority is restoring economic growth.⁶⁴ In fact, it was the main concern for 48% of the respondents to a survey in April 2025.⁶⁵ According to the International Monetary Fund (IMF), the ROK’s real GDP grew in 2024 by 2.0%. The figure is greater than the average of advanced economies, at 1.8%. However, it is distant from the 3.5% average growth rate for the 2007-2016 period and, of course, extremely far from the two-digit growth of the 1970s-1990s.⁶⁶ In addition, growth projections, are not great—0.9% (2025), 1.8% (2026) and 1.9% (2030)⁶⁷—and the IMF affirms that “Korea’s potential growth rate has slowed at a faster pace relative to its peers.”⁶⁸ Recent evolution of real GDP growth can be consulted in Figure 1.

| | 2007-16 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2030 |
|------|---------|------|------|------|------|------|------|------|------|------|------|------|
| ROK | 3.5 | 3.4 | 3.2 | 2.3 | -0.7 | 4.6 | 2.7 | 1.6 | 2.0 | 0.9 | 1.8 | 1.9 |
| A.E. | 1.3 | 2.6 | 2.3 | 1.9 | -3.9 | 6.0 | 3.0 | 1.7 | 1.8 | 1.6 | 1.6 | 1.5 |

Figure 1. Comparison between the annual real GDP growth rate of the Republic of Korea (ROK) and advanced economies (A.E.). Data for the 2007-2016 period represent the average growth rate; data for 2025 and on are IMF projections (source: IMF).⁶⁹

This deceleration could be explained by several factors. Firstly, while the *chaebols*—the large-scale conglomerates that dominate the ROK’s economic landscape—are characterized by their high productivity, that is not the case for small or medium-sized enterprises (SMEs). Secondly, increasing regulation is burdening economic growth. Lastly, the weight of exports in Seoul’s economy has been affected by recent international events. This could refer to either economic disruptions—namely, increasing tariffs or the

⁶⁴ Victor Cha and Andy Lim, “[South Korea’s New President: Frying Pan to Fire](#),” *Center for Strategic & International Studies*, March 6, 2025.

⁶⁵ Gallup Korea, “South Korea: Political Priorities 2025.”

⁶⁶ World Bank Group, “[GDP growth \(annual %\) - Korea, Rep.](#),” World Bank Open Data, accessed October 28, 2025.

⁶⁷ International Monetary Fund, [World Economic Outlook: Global Economy in Flux, Prospects Remain Dim](#) (International Monetary Fund, 2025), 125.

⁶⁸ International Monetary Fund, *Republic of Korea: 2024 Article IV Consultation*, 4.

⁶⁹ International Monetary Fund, *World Economic Outlook, October 2025*, 125.

development of national industrial policies—or non-economic, as is the case for supply chain disruptions or wars.⁷⁰

Still, there are two important sectors in the South Korean economy that are buoyant. On the one hand, the ROK is the second largest semiconductor manufacturer in the world. Its main companies in the sector are Samsung Electronics and SK Hynix.⁷¹ In 2023, integrated circuits accounted for 20.8% of South Korea’s exports.⁷² Additionally, the ROK holds 75% of the global production of DRAM memories, as well as a leading position in high bandwidth memories (HBM), essential for AI-related products.⁷³ The semiconductor industry has seen continuous support from governments of different political signs. Yoon’s K-Chip Act 2023 benefits have been extended by a new K-Chip Act in February 2025. It includes a 20 to 30% tax credit rate for investment in semiconductors facilities, as well as a 30 to 50% tax credit rate for R&D investments.⁷⁴ Lee promised in the electoral campaign that he would increase government support.⁷⁵ This support will be essential for a sector that is expected to grow globally at an average rate of 7.5% for the following five years and to reach \$1 trillion in sales by 2030.⁷⁶

On the other hand, an increasingly related industry with that of semiconductors is artificial intelligence (AI). Even if the ROK is not at the lead in the AI global race, it is among the countries that are advancing the most. In December 2024, it was the second country after the EU to enact a legal framework for its use.⁷⁷ The AI Framework Act will take effect by 2026 and has been praised for harmonizing “minimal regulation with AI promotion.”⁷⁸ However, the government still plays a very important role in its development and private

⁷⁰ International Monetary Fund, *Republic of Korea: 2024 Article IV Consultation*, 22–24; Hyerin Kim, *Critical and Emerging Technologies Index 2025: South Korea Report* (Belfer Center for Science and International Affairs, 2025), 1.

⁷¹ Kim, *Critical and Emerging Technologies Index 2025: South Korea Report*, 4; Troy Stangarone, [The Role of South Korea in the U.S. Semiconductor Supply Chain Strategy](#), NBR Congressional Affairs (National Bureau for Asian Research, 2023).

⁷² The Observatory of Economic Complexity, [“South Korea \(KOR\) Exports, Imports, and Trade Partners.”](#) The Observatory of Economic Complexity, August 2025.

⁷³ Jeroen Kusters et al., [“2025 Global Semiconductor Industry Outlook.”](#) *Deloitte Insights*, February 4, 2025; Kim, *Critical and Emerging Technologies Index 2025: South Korea Report*, 4.

⁷⁴ Eun-jin Kim, [“K-Chips Act’ Clears Major Legislative Hurdle, Enhancing Tax Incentives for Semiconductor Industry.”](#) *Businesskorea*, February 18, 2025; Jongwan Ko, [“Industry Focus: South Korea’s Semiconductor Industry and Investment.”](#) *Invest KOREA*, October 2, 2025.

⁷⁵ Min-kyung Jung, [“Lee vows tax benefits, special law for chip industry.”](#) *The Korea Herald*, *The Korea Herald*, April 28, 2025.

⁷⁶ Kusters et al., “2025 Global Semiconductor Industry Outlook.”

⁷⁷ Kim, *Critical and Emerging Technologies Index 2025: South Korea Report*, 2.

⁷⁸ Kyoungjin Choi, [“Analyzing South Korea’s Framework Act on the Development of AI.”](#) *IAPP*, January 23, 2025.

investment is low.⁷⁹ Another example of ROK's desired leading position in the AI industry is APEC's summit, held in Gyeongju in October 2025 and mainly dealing with this topic.⁸⁰ Finally, some words must be said about the solutions AI might bring for other problems we have previously discussed. It has been argued that productivity increases caused by AI could compensate for labor shortages due to the demographic challenges. Similarly, it could help overcome the low productivity of SMEs.⁸¹

These two sectors, nevertheless, are highly competitive, and China, the US and Japan are willing to take the lead. The ROK's industry faces, in this sense, two main problems. On the one hand, Seoul's global leadership is only in terms of memory chips, not on system chips—Taiwan's domain, to say it that way. However, the rise of IA is demanding more integrated semiconductors that combine both activities.⁸² Strategic partnerships with Taiwan could be the way out of this issue.⁸³ Another possibility is the creation of a government-backed chipmaker, emulating the ROC's TSMC.⁸⁴ On the other hand, even if South Korea has one of the greatest R&D workforce to population ratio in the world, a key problem in its high-tech industry is talent shortage. Professional satisfaction and financial conditions remain low when compared to other competitors: 70% of 20 and 30-year-old workers in the industry had considered moving overseas, according to a survey.⁸⁵ While other countries—namely, China, Japan, and the US—are fighting to attract South Koreans to their country, the ROK will have a labor shortage of more than 50,000 workers by the end of this decade. Anyhow, the government has already started taking some

⁷⁹ Sejin Kim and Hodan Omaar, [One Law Sets South Korea's AI Policy—and One Weak Link Could Break It](#) (Information Technology & Innovation Foundation, 2025), 11–12; Kim, *Critical and Emerging Technologies Index 2025: South Korea Report*, 2.

⁸⁰ [“2025 APEC Leaders’ Gyeongju Declaration,”](#) *Asia-Pacific Economic Cooperation* (Gyeongju), November 1, 2025.

⁸¹ Soo Jung Chang et al., *Transforming the Future: The Impact of Artificial Intelligence in Korea*, SIP/25/013, IMF Selected Issues Paper (International Monetary Fund, 2025); International Monetary Fund, *Republic of Korea: 2024 Article IV Consultation*, 23, 40.

⁸² He-rim Jo, [“Beyond memory: Korea’s next big semiconductor challenge,”](#) *The Korea Herald*, February 5, 2025.

⁸³ Hyung-gon Jeong, “An Analysis of South Korea’s Global Competitiveness in Memory and System Semiconductors,” *World Economy Brief* 15, no. 13 (2025): 25.

⁸⁴ [“South Korea Eyes \\$13.9B ‘KSMC’ to Rival TSMC in the Global Semiconductor Showdown,”](#) Industrial, *Astute Electronics*, December 30, 2024.

⁸⁵ Yeon-woo Lee, [“Why Korean STEM Talent Continues to Move Abroad,”](#) *The Korea Times*, November 3, 2025.

measures: it has introduced a new visa for skilled workers in high-tech industries and has boosted programs to attract foreign students to South Korea.⁸⁶

To put an end to this section, given the importance of exports in the ROK's economy, we consider it necessary to devote some lines to it. Indeed, in 2023, exports of goods and services amounted to 44% of its GDP and it was the 8th largest exporter in the world.⁸⁷ In 2024, South Korea had 21 Free Trade Agreements (FTAs) with 59 different countries, amassing a total 85% of the global GDP. Interesting ongoing negotiations include a trilateral FTA between the PRC, Japan and South Korea and a ROK-Mercosur FTA.⁸⁸ Trump's tariffs have pushed for greater advances in these negotiations.⁸⁹

As of the current state of the ROK's international trade, it benefits from a favorable trade balance. In 2023, the trade value of exports (\$645 billion) greatly surpassed that of imports (\$481 billion). Its three main exports are integrated circuits (20.8%), cars (10%) and refined petroleum (7.59%). Seoul's main partners in terms of exports are China (25.1%), the US (18.3%) and Japan (4.41%). Integrated circuits have a special weight in trade with China, while cars are the main export to the US. When it comes to imports, the same partners appear, though with a different share: China (30.6%), US (12.7%) and Japan (8.88%). ROK has a positive trade balance with China (\$15 billion) and the US (\$56.7 billion). It is not the case for Japan, where the ROK sees a negative trade balance of \$14.3 billion.⁹⁰ This is mainly since Japan provides many of the components necessary for the manufacturing of semiconductors. The politics that underlie these commercial relations will be studied in the last section, but for the moment let us signal an important trend: over the last years, the trade tensions between the US and China has pushed the ROK for a realignment of its commercial policy, which has finally inclined in favor of the US.⁹¹

⁸⁶ Rajiv Kumar, "[The Global Battle for Chip Talent: South Korea's Strategic Dilemma](#)," *The Diplomat*, September 5, 2025.

⁸⁷ Hua Chai and Hyeryoun Kim, *Korea in a Changing Global Trade Landscape*, SIP/25/014, IMF Selected Issues Paper (International Monetary Fund, 2025), 2; World Bank Group, "[Exports of Goods and Services \(% of GDP\) - Korea, Rep.](#)," World Bank Open Data, 2023.

⁸⁸ Chai and Kim, *Korea in a Changing Global Trade Landscape*, 2; A comprehensive list can be found at Ministry of Trade and Industry of the Republic of Korea, "[FTA 강국, KOREA](#)," FTA 강국, KOREA, 2025.

⁸⁹ Laura Sesma, "[Trumps tariffs foster trilateral rapprochement between China, Japan, and South Korea](#)," *Global Affairs and Strategic Studies*, June 10, 2025.

⁹⁰ The Observatory of Economic Complexity, "South Korea (KOR) Exports, Imports, and Trade Partners."

⁹¹ Chai and Kim, *Korea in a Changing Global Trade Landscape*, 4–5.

As a whole, economic deceleration has been an important preoccupation for South Korea in the last years. Even if prospects by international organizations do not seem positive, there are notable opportunities in the semiconductor industry, of which ROK already holds an important know-how, and in the domain of AI, a rising business in this country. Furthermore, both receive notable governmental support. Innovation in these sectors may even provide solutions for other internal problems such as the demographic challenge. When it comes to international trade, Seoul is in the middle of rebalancing that may result in a tilt towards the US instead of China. More on it will be analyzed in the third chapter of this report.

2. PENINSULAR GEOPOLITICS

Unification of the Koreas is a constitutional mandate in the ROK. Attempts have been made in the past to bring both states closer, but they have all failed due to the DPRK's aggressive attitude. In any case, President Lee has launched the END Policy (exchange, normalization and denuclearization), including the creation of trust-building mechanisms. In addition to that, we analyze in this section the role of the US Forces in Korea (USFK), how they deter North Korea and the new geopolitical challenges faced by the US and South Korea in the region. The return of Donald Trump to power will include, probably, renewed meetings and negotiations for the denuclearization of the Hermit Kingdom. However, this is not 2019: North Korea international isolation is long gone.

2.1. RELATIONS BETWEEN BOTH KOREAS

The South Korean Constitution stipulates that the ROK shall “carry out a policy of peaceful unification based on the basic free and democratic order.”⁹² That is easier said than done, given that the relation between the two Koreas has been hostile throughout most of their history, marked by the Korean War and the constant provocations by North Korea. In the early 2000s, North Korea conducted its first nuclear test. Since then, the North Korean nuclear program has increased, with tests of ballistic missiles occasionally occurring over the Sea of Japan. Attempts by South Korea to a peaceful coexistence and improvement of relations with the North, such as the Sunshine Policy, have failed to yield considerable results, as the continued incidents with North Korea have shown.

However, the level of violence of border incidents has decreased in years. The deadliest one, the sinking of ROK's *Cheonan* by a North Korean submarine on March 26, 2010, had killed 46 sailors.⁹³ In recent years, the incidents have mostly involved the sending of trash balloons from the North to the South, warning shots fired by South Korean soldiers whenever groups of soldiers cross the DMZ, and occasional incidents at sea when a civilian vessel or military ship crosses or strays nearby to the border, normally involving

⁹² R.O.Korea Const. [art. 4](#).

⁹³ Victor Cha, “[The Sinking of the Cheonan](#),” *Center for Strategic & International Studies*, April 22, 2010.

warning shots and at least on a few occasions retaliation of artillery bombardments near border areas.⁹⁴

South Korean President Lee Jae-myung has taken a pragmatic approach to his neighbors and has promoted measures to deescalate tensions between the two Koreas.⁹⁵ He has, for instance, put an end to the loudspeaker psychological warfare tactics used in the DMZ, a measure later corresponded by the DPRK. Lee has vowed to improve relations with the North, a traditional policy of the DPK and its predecessors. Different attempts at the Sunshine Policy—the name given to the program of rapprochement—have been explored since 1998 under Presidents Kim Dae-jung and Roh Moo-hyun. The last progressive president, Moon Jae-in, used the 2018 Winter Olympics to attempt to get closer to the North. They were parallel to the historic meetings between the US President Donald Trump and Kim Jong Un in Singapore and Hanoi in 2018 and 2019, as well as the famous meeting between Trump and Kim in the DMZ.⁹⁶ In this line, Lee has relaunched projects that had been paralyzed under the previous government such as the Kaesong Industrial Complex in North Korea, a major project launched under the Sunshine Policy.⁹⁷

Lee's general policy towards North Korea was outlined at the 80th UN General Assembly, in September 2025. It is known as END, which stands for Exchange, Normalization, and Denuclearization. Lee has also made clear that they will respect Pyongyang's political system and will not seek reunification by absorption.⁹⁸ The denuclearization of North Korea has always been a thorny issue, ever since the North tested its first nuclear weapon. Indeed, this issue has been on the top list of US and South Korean diplomats when dealing with North Korea. The DPRK, for its part, has always refused to abandon its nuclear program.⁹⁹

⁹⁴ Tong-Hyung Kim, "[South Korean Soldiers Fire Warning Shots after North Korean Troops Cross Border, Apparently in Error](#)," *Associated Press*, June 18, 2024; David D. Lee, "[South Korea Fires Warning Shots as North Korean Ship Crosses Sea Boundary](#)," *Al Jazeera*, September 26, 2025.

⁹⁵ Shinae Lee, "[Lee Jae-Myung's Pragmatic Diplomacy: Between Alliance and Autonomy](#)," *Sasakawa Peace Foundation*, August 1, 2025.

⁹⁶ Frederic Spohr, "[South Korea's Sunshine Policy: A Fresh Start in Moscow's Shadow](#)," *Friedrich Naumann Foundation*, August 19, 2025.

⁹⁷ "[South Korea to Revive Foundation Supporting Suspended Inter-Korean Factory Complex](#)," *The Hans India*, October 14, 2025.

⁹⁸ Anna J. Park, "[Lee Outlines Vision to End Hostility on Korean Peninsula](#)," *The Korea Times*, September 24, 2025.

⁹⁹ The Hans India, "[Top South Korean, US Diplomats Reiterate 'resolute' Commitment to North Korean Denuclearisation](#)," *The Hans India*, January 8, 2025.

However, unlike the previous South Korean leaders who attempted to approach the North, Lee faces a changed Korean Peninsula. Indeed, in the last three years, the realignment of North Korea and Russia after the start of the Ukraine War has drastically changed the situation on the Peninsula. North Korea has deployed soldiers to fight in Ukraine and sent ammunition, KN-23 short range missiles, and Koksan howitzers.¹⁰⁰ Russia has, for its part, taken steps to erode the effect of sanctions upon the North Korean regime, lifting the isolation imposed on it due to its nuclear program. Furthermore, Russia and the DPRK have expanded their strategic ties, with the two nations signing in 2024 a Mutual Defense Pact, establishing that in case of an act of aggression by another country, military assistance was guaranteed.¹⁰¹ It is currently unclear how Moscow will repay Pyongyang for its assistance. However, many have speculated that Russia could transfer military technology to North Korea.¹⁰²

Besides, North Korea has not given any lasting response to the attempts by the South to establish peaceful relations with the North. They all have ended in deadlock, as the North has repeatedly dismissed attempts.¹⁰³ What changes from previous South Korean governments is that Lee has not placed denuclearization first as a condition to open up to the North. While on paper it leaves more room to maneuver with the North, the plan has several setbacks, including dependency on verification mechanisms to ensure that the Hermit Kingdom keeps its end of the deal. Lee recognizes that the construction of trust is necessary for END to succeed, and he has attempted to build set mechanisms. Lee aims to achieve this trust using soft power strategies such as cultural exchanges, humanitarian work and civil society. The aim of these programs is to also create trust between the people of the two Koreas.¹⁰⁴

However, the nature of North Korea makes it nearly impossible to identify the effects aid has on its society. Reports from the previous attempts by Kim Dae-jung and Roh Moo-hyun governments in 1998 and 2008 have painted a bleak picture. Despite encouragement and economic aid to the North, there were no major changes in the behavior of

¹⁰⁰ Yuri Zoria, "[Four North Korean Koksan Howitzers Destroyed by Ukrainian Drones in Zaporizhzhia and Luhansk Oblasts.](#)" *Euromaidan Press*, September 30, 2025.

¹⁰¹ Kelsey Davenport, "[North Korea, Russia Strengthen Military Ties.](#)" *Arms Control Association*, August 2024.

¹⁰² Yonhap, "[N. Korea's FM Vows to Strengthen 'strategic, Tactical' Cooperation with Russia.](#)" *The Korean Herald*, October 17, 2025.

¹⁰³ The Hans India, "[South Korean President Lee Vows to Respect North Korea's Political System.](#)" *The Hans India*, August 15, 2025.

¹⁰⁴ Simon Hutagalung, "[END Policy: A New Path For Koreans Peninsula Peace – OpEd.](#)" *Eurasia Review*, 9 2025.

Pyongyang, with border incidents and hostility to the South continuing. Detractors of the Sunshine Policy in South Korea pointed to the sinking of the *Cheonan* in 2010 as evidence that despite massive aid and attempts to engage positively with the North, nothing had changed.¹⁰⁵ Even during the first year of the Sunshine Policy, incidents continued between the North and South, such as the 1998 Sokcho Submarine incident.¹⁰⁶ Attempts to improve relations with the North are also hampered whenever joint exercises between the US, the ROK, and Japan take place.¹⁰⁷

Another concern rising in the region is the ongoing rule of the Kim dynasty in North Korea in the foreseeable future. In recent years, the presence of Kim Jong-un's sister, Kim Yo-jung has increased. Another figure periodically appearing alongside the DPRK Supreme Leader is his daughter, Kim Ju-ae, who has taken a more public image since 2022, during the test launch of a ballistic missile. She later appeared alongside her father in Beijing during the Chinese Military parade to commemorate the end of the Second World War. This has caused speculation among analysts that she could be Kim's successor,¹⁰⁸ with his health rumored to be deteriorating going as far back as 2024.¹⁰⁹ The increased public appearance from Kim Ju-ae has caused speculation that she has been chosen as the successor of Kim Jong-un.¹¹⁰ However, analysts have speculated that Kim Ju-ae may face several challenges to be the next leader of North Korea. The first concern is her age: she is believed to be between twelve and thirteen years old.¹¹¹ Another challenge she could face is opposition from some members of the DPRK leadership, as seen with Kim Jong-un's rise to power. However, based on the experience of Kim Jong-un, who became leader at twenty-eight years old and brutally consolidated power, it is likely we could see a similar event occurring.¹¹² Therefore, it is likely that North Korea

¹⁰⁵ Ronald Popeski, "[Sunshine Policy Failed to Change North Korea: Report](#)," *Reuters*, October 18, 2010.

¹⁰⁶ BBC News, "[Sub Incident Harms Korean Relations](#)," *BBC News*, June 22, 1998.

¹⁰⁷ Al Jazeera, "[North Korea Slams 'Dangerous' Drills by US, Japan, South Korea](#)," *Al Jazeera*, September 14, 2025.

¹⁰⁸ Ramy Inocencio, "[North Korea's Kim Jong Un Debuts Daughter – and Potential Successor – to the World](#)," *CBS News*, September 3, 2025.

¹⁰⁹ The Economic Times, "[How Sick Is North Korean Leader Kim Jong Un? How Much Does He Weigh and What Symptoms He Has Shown of Ailments? Know about Secretive State's Ruler](#)," *The Economic Times*, July 30, 2024.

¹¹⁰ Ju-min Park and Jack Kim, "[North Korea Leader Firming up Status of Daughter as Successor, Seoul Spy Agency Says](#)," *Reuters*, September 11, 2025. Julian Ryall, "[Kim Jong Un's daughter: North Korea's next leader?](#)," *DW*, September 4, 2025.

¹¹¹ Flora Drury, "[What Do We Know about Kim Jong Un's Daughter - and Potential Successor?](#)," *BBC News*, September 2, 2025.

¹¹² Eleanor Albert, "[North Korea's Power Structure](#)," *Council on Foreign Relations*, June 17, 2020.

will continue under the control of the Kim dynasty for the foreseeable future, as the succession of Kim Jong-un and Kim Jong-il has demonstrated that the Kim dynasty is capable of keeping party members in line.

Scenario construction: Prospects for ROK-DPRK relations (2025-2030)

In the following lines, we will apply the scenario construction technique to study different possibilities in the future of ROK-DPRK relations. We selected two different drivers: internal stability of the DPRK (increased or decreased) and the ROK's policy towards Pyongyang (rapprochement or confrontation). The time frame for this analysis is the expected duration of Lee's presidency (2025-2030).

1) In first place, one of the most likely prospects for the ROK-DPRK relations would be an attempt by the South to retry the Sunshine Policy with a reinforced North Korea. As it has happened before, it would fail due to North Korea's increased strength and unwillingness to negotiate or denuclearize. Such an approach would be hampered by the US focus on deterrence and denuclearization. In the long run, this policy would be abandoned as lack of results and ongoing ballistic missile tests would cast doubt on the practicality of attempting to approach North Korea.

2) In second place, if the ROK adopts a cordial stance while the DPRK internal stability weakens, we could see a successful scenario for the Sunshine Policy. In a situation of economic necessity, the North would welcome South Korea's aid in exchange for reductions in military spending and, eventually, the denuclearization of the Peninsula. Unification would remain as a long-term objective, but it would require internal reforms in the DPRK, supported by South Korean officials.

3) In third place, given the lack of reciprocity by North Korea, the ROK could adopt a more confrontational policy. In a situation where the Kim rule gets reinforced, this would lead to increased hostility in the Korean Peninsula. As a consequence, incidents would continue to increase in number and seriousness: even ground skirmishes could be seen. This would lead to a notable loss of support in the South for rapprochement and would lead to aggravated tensions across the Peninsula. Only the mediation of international agents would limit further escalation in the conflict.

4) Lastly, if the ROK adopts a confrontational policy and faces a weakened North Korea, we would approach a scenario of unification by absorption. Given this situation, we consider that a third actor, such as the PRC, would intervene to guarantee a limited

stability in North Korea. It is possible that Kim Jong-un is toppled and replaced by a closer ally to China within the current ruling elite of the DPRK, turning it effectively into a Chinese puppet state.

In conclusion, the future of the ROK-DPRK relationship is very volatile. Lee's declarations regarding the END Policy leads us to believe that the first scenario will be the most likely. Anyhow, we can affirm that unification of both Koreas is not a plausible scenario in the following years, as it is not contemplated under a single scenario. Similarly, tensions in the Peninsula remain in three out of the four scenarios proposed.

* * *

Based on the information found, we can conclude that the situation in the Korean Peninsula is likely to remain tense in the foreseeable future, as South Korea maneuvers a tense situation with its northern neighbor reminiscent of the Cold War, when North Korea was allied to the USSR. Furthermore, Lee's END Policy is likely to face severe challenges and stagnate in the same way as the Sunshine Policy has done before. In any case, unification is not to be expected in the medium term.

2.2. SECURITY IN THE KOREAN PENINSULA: US FORCES KOREA

Security in the Korean Peninsula is marked by the ongoing tension between the two Koreas since the end of the 1950-1953 Korean War. On October 1, 1953, the US and South Korea signed a mutual defense treaty, guaranteeing American assistance to the South in case of attack by the North.¹¹³ This led to the establishment of the US Forces Korea (USFK) and a permanent presence of the US Military in the country that remains to this day.

The USFK main forces are the 8th Army, with the 2nd Infantry Division being the bulk of the US ground forces in the area.¹¹⁴ The other main component of USFK is the 7th Air Force, which, alongside the command elements of the Navy, Marine Corps, and Special Forces, number around 28,500 troops in the Peninsula. The presence of USFK includes several large military installations in the country such as Camp Humphreys, which is the largest US military base in Asia and serves as the headquarters of USFK. The US also

¹¹³ Mutual Defense Treaty Between the United States and the Republic of Korea, U.S.-R.O.K., October 1, 1953, 5 U.S.T. 23602376.

¹¹⁴ US Army, "[MSC Organization US Eight Army](#)," Official Website of the US Eight Army, October 20, 2025.

has two air bases in South Korea, located at Osan and Kunsan, which hold more than sixty USAF F-16 fighter aircraft.¹¹⁵

The main mission of the USFK has been to deter any act of aggression towards South Korea by the North. The US achieves these goals by conducting annual military exercises with South Korean forces, weapons sales, and a joint command structure which includes US and South Korean commanders.¹¹⁶ Furthermore, USFK has the Combined Forces Command (CFC), a joint US-South Korean military command, which commands the USFK. The force is led by a US General with a South Korean General as second in command. In case of conflict, all US and South Korean forces would fall under the US officer commanding the CFC.¹¹⁷

South Korea is, according to some sources, the third country in the world with the largest number of US troops, behind Japan and Germany.¹¹⁸ The US has also conducted multinational exercises with other regional allies, like Japan, Australia, and New Zealand, focused at deterring North Korea and to a certain degree China.¹¹⁹ In fact, the USFK is reinforced by the US Forces in Japan (USFJ), and the wider Indo-Pacific Command, which coordinates all US Military units in the Indian and Pacific Oceans.

In recent years, the situation in Asia has changed drastically. With the rise of China as an economic and military power and the increased threat it has posed to Taiwan's independence, the US initiated a pivot from Europe and the Middle East to Asia. With the increased tensions in the Taiwan Strait, the US has been weighting options to counter China. One of the proposals that has raised concern in Seoul is the possibility that the USFK could shift their mission priorities from deterring North Korea to countering China. According to reports, the Trump Administration was considering the redeployment of 4,500 soldiers from USFK to places like Guam and other locations across the region.¹²⁰ With US military aid commitments to Ukraine and conflict in the Middle East, the US

¹¹⁵ Benjamin Sando, "How Can US Forces Korea Help Deter Both North Korea and China?," *Global Taiwan Brief*, July 2, 2025.

¹¹⁶ Bureau of Political-Military Affairs, "[U.S. Security Cooperation With the Republic of Korea \(ROK\) Fact Sheet](#)," U.S. Department of State, January 20, 2025.

¹¹⁷ US Forces Korea, "[Combined Forces Command](#)," United States Forces Korea Website, 2024.

¹¹⁸ World Population Review, "[US Troop Presence by Country 2025](#)," World Population Review, 2025.

¹¹⁹ Victor Murkowski, "[U.S., Allied Forces Complete Exercise Pacific Vanguard 2025](#)," *US Indo-Pacific Command*, May 9, 2025.

¹²⁰ Gabriela Bernal, "[US Troops in Korea May Soon Switch Focus from Pyongyang to Beijing](#)," *The Interpreter*, May 27, 2025.

has been forced to reshape priorities. The US has apparently taken a more flexible response to adversaries.¹²¹ This issue is discussed at length in point 3.1 of this report.

South Korea has responded negatively to these proposed plans by the US Military, as they fear that South Korea would lose its security umbrella.¹²² The main fear from South Korea is the possibility that if China invades Taiwan, US troops in South Korea could be redeployed to Taiwan, leaving the path open for a North Korean attack. The US has also pressured the South to increase its defense expenditure and to cover more of the cost of the thousands of American soldiers in the Peninsula. Trump's move in regard to South Korea is not an isolated occurrence, as the US is increasingly focused on countering China and seeking assistance from at times reluctant allies.¹²³

This is not the first time US Military measures in the Peninsula have sparked backlash from Seoul. In 2017, in order to counter North Korea's missile tests, the US deployed Terminal High Altitude Area Defense (THAAD) systems to South Korea after an agreement between the two countries in 2016.¹²⁴ China criticized the deployment, accusing the US of deploying offensive weapons aimed at China. Beijing then retaliated by initiating trade disputes with the ROK. Many South Koreans, especially the opposition, criticized the decision, citing environmental concerns. The Moon Jae-in government froze the decision taken by the previous government of Park Geun-hye to accept the deployment of the THAAD.¹²⁵

South Korea has taken steps to improve its security situation since the US implied reorganization and modernization of the alliance. On October 1, 2025, Lee vowed to increase the South Korean defense budget to 8.2% by 2026.¹²⁶ According to some reports, the proposed budget would reach \$47.6 billion, the largest increase in seven years, with the focus on countering missiles.¹²⁷ These defense increases have been followed by

¹²¹ Yun Jo Bee, "[Navigating the New Normal: Strategic Simultaneity, US Forces Korea Flexibility, and Alliance Imperatives](#)," *Atlantic Council*, August 27, 2025.

¹²² Jesse Johnson, "[Lee Signals Resistance to Shifting U.S. Forces Korea's Focus to China](#)," *The Japan Times*, August 25, 2025.

¹²³ Sando, "How Can US Forces Korea Help Deter Both North Korea and China?"

¹²⁴ Ethan Meick and Nargiza Salidjanova, [China's Response to U.S.-South Korean Missile Defense System Deployment and Its Implications](#) (U.S.-China Economic and Security Review Commission, 2017).

¹²⁵ BBC News, "[South Korea Halts Thaad Anti-Missile System Rollout](#)," *BBC News*, June 7, 2017.

¹²⁶ Ju-min Park and Heejin Kim, "[South Korea to Increase Defence Budget by 8.2% next Year, President Lee Says](#)," *Reuters*, October 1, 2025; "[Defense Budget](#)," Official Website of the Ministry of National Defense Republic of Korea, 2025.

¹²⁷ David Choi and Yoojin Lee, "[South Korea Seeks \\$47.6 Billion Defense Budget, Biggest Increase in 7 Years](#)," *Stars and Stripes*, September 4, 2025.

modernization programs for the military.¹²⁸ South Korea's military had been traditionally armed with American weapons, a situation latent due to the country's fragile situation in the Korean War. In recent years however, the South Korean domestic military industry has increased greatly, making inroads as a major arms exporter.¹²⁹ One of the key strengths of South Korea's military industry is shipbuilding, with virtually all of the ROK Navy ships being built by South Korean firms.¹³⁰ South Korea has also sought to reduce its dependency on US military equipment with several domestic programs aimed at improving its existing capabilities. One of the most well-known is South Korea's alternative to the US' F-35 Lightning Fifth Generation fighter.¹³¹ Known as the KF-21 Boromae, it is meant to replace their older fleet of US Fighter aircraft.¹³²

However, despite these modernization efforts, South Korea's security is still heavily dependent on the United States, particularly in regard to nuclear deterrence, not to mention that training and experience from the US has been vital for South Korea.¹³³ North Korea's conventional forces are formidable opponents, even if the ROK has more modern weapons.¹³⁴

Despite the reorganization, US forces have continued to engage in military exercises with their South Korean counterparts and in some cases Japanese allies, with increased focus on air defense capabilities and ballistic missile intercept, maintaining the US as a key part of South Korea's security.¹³⁵

2.3. THE ROLE OF DONALD TRUMP

In the 2024 elections, Donald Trump was elected to become the President of the United States of America for a second term. Trump's return to the White House triggered concerns of a return to his America First Agenda in international affairs. Trump's first

¹²⁸ Gordon Arthur, "[South Korean Military Paves Way for Robotic Vehicles in Its Ranks](#)," *DefenseNews*, April 11, 2024; Zona Militar, "[The Israeli-Made Trophy APS Systems Will Equip the K2 Black Panther Tanks of the South Korean and Polish Armies](#)," *Zona Militar*, September 17, 2025.

¹²⁹ Defense Security Asia, "[Iraq Eyes 250 South Korean K2 Black Panther Tanks in US\\$ 6.5 Billion Deal to Replace Aging Abrams Fleet](#)," *Defense Security Asia*, October 15, 2025.

¹³⁰ Sea Forces-Online, "[Republic of Korea Navy](#)," Sea Forces-Online, 2025.

¹³¹ Inder Singh Bisht, "[South Korea to Upgrade Indigenous KF-21 Into Stealth Fighter](#)," *The Defense Post*, October 15, 2025.

¹³² GlobalMilitary.net, "[Republic of Korea Air Force](#)," GlobalMilitary.net, June 23, 2025.

¹³³ Robert Billard, "[Marines Sharpen U.S. and Korean Relations at Ulchi Freedom Shield 25](#)," *Military.Com*, October 15, 2025.

¹³⁴ ArmedForces.eu, "[Military Power of North Korea & South Korea](#)," ArmedForces.eu, 2025.

¹³⁵ U.S. Indo-Pacific Command Public Affairs, "[Exercise Freedom Edge 2025](#)," *US Indo-Pacific Command*, August 4, 2025.

term was characterized by changes in US policy, including bringing into fruition Barack Obama's pivot to the Indo-Pacific in 2011. China became the top priority of the US, while Trump was critical of the shortcomings of international organizations such as NATO and the UN. Although these were somewhat exaggerated, his concerns had some truth.

Trump's first term relationship with South Korea was characterized by increased pressure on North Korea. Most noteworthy, in 2017 during his speech at the UN, Trump took aim at the North Korean regime, referring to the arrest and torture of Otto Warmbier and the abduction of Japanese citizens by North Korea. Trump also criticized the North Korean nuclear program and stated that if forced to defend the US or their allies they would destroy North Korea, culminating his segment of the speech regarding North Korea with the insult "Rocket man" aimed at Kim Jong-un.¹³⁶ Despite these remarks, Trump remained open to diplomacy with Pyongyang, becoming the first US President to meet with a North Korean leader, when he and Kim Jong-un met in 2018 in Singapore.¹³⁷ Trump was also the first US President to visit the DPRK when he met at the border with Kim Jong-un in 2019.¹³⁸ However, the main goal of the meetings, denuclearization, was not achieved.

Going back to the present, in February 2025, after meeting Japan's Prime Minister, Shigeru Ishiba, Trump voiced his willingness to meet again with Kim Jong-un, hoping to leverage his closeness with the North Korean ruler to make progress.¹³⁹ Trump's second administration has kept to its policy of denuclearization of North Korea. North Korea has responded that while they are willing to talk, any pressure on them to denuclearize would be counterproductive.¹⁴⁰ There was speculation over a possible meeting with Kim as Trump attended the APEC summit in October 2025,¹⁴¹ but it did not materialize.

¹³⁶ Donald Trump, "[Remarks by President Trump to the 72nd Session of the United Nations General Assembly](#)," (New York), September 19, 2017.

¹³⁷ Henry Fernandez and Ken Martin, "[Trump, Kim Jong Un Sign Document of Progress](#)," *FOXBusiness*, November 6, 2018.

¹³⁸ Kevin Liptack, "[Trump Takes 20 Steps into North Korea, Making History as First Sitting US Leader to Enter Hermit Nation](#)," *CNN*, June 30, 2019.

¹³⁹ Chris Massaro, "[President Trump Says 'We Will Have Relations with North Korea'; It's a 'big Asset' That He Gets along with Kim](#)," *Fox News*, February 7, 2025.

¹⁴⁰ Morgan Phillips, "[White House Responds to 'Rocket Man' and North Korea's Threats over Denuclearization](#)," *Fox News*, July 31, 2025.

¹⁴¹ Jin-Kim Hyung and Tong-Hyung Kim, "[Trump-Kim Meeting Speculation Flares Ahead of US President's Visit to South Korea](#)," *Associated Press*, October 24, 2025.

However, it is unlikely that Trump's push for denuclearization will succeed, as even previous attempts to establish relations between the West and North Korea have yielded little results. In the current geopolitical context, in which North Korea has gone closer to Russia and China than it was in 2019,¹⁴² Trump has relied on personal connection with leaders to surprising results to be able to achieve diplomatic objectives. This unorthodox approach may not work with the new North Korea. Another reason is that North Korea sees nuclear weapons as necessary for its survival, a vision shaped by US President Bush's "Axis of Evil" speech, the US Invasion of Iraq that toppled Saddam Hussein and the 2011 NATO air campaign that led to the downfall and execution of Muammar Gaddafi in Libya. These events cemented a fear in North Korea that the same thing could happen to the Kim dynasty.

Furthermore, attempts to negotiate with the North may fail as the Sunshine Policy showed. North Korea did not reciprocate the South Korean sentiment to negotiate and as mentioned previously, reacted with hostility towards the South. In addition to the Sokcho Submarine incident, the ROK had two naval skirmishes with the DPRK in the disputed border area of Yeonpyeong Island.¹⁴³ The first was in 1999, just a year after the start of the Sunshine Policy, and in 2002 a second skirmish occurred. While small in scale it did show that the DPRK was not willing to open up with the South.¹⁴⁴ The same island was shelled by North Korean artillery in 2010.¹⁴⁵ The artillery duels left a handful of soldiers dead on both sides and a few South Korean civilians. The US Naval forces, including the George Washington Carrier Group were dispatched to the region to join US-South Korean exercises and deter the North from further escalation.¹⁴⁶ Adding to the tensions was the already mentioned sinking of the ROK's *Cheonan*.

These events show the limitations of attempting to interact with North Korea, as its unpredictability makes it difficult to make progress. Furthermore, Pyongyang's nuclear and ballistic missile tests cause tensions to rise with the US, especially as the DPRK launches missiles at sensitive times—namely, when US Presidents visit Asia.¹⁴⁷ The most

¹⁴² "[As Trump Seeks Another Meeting with Kim Jong Un, It's Not 2019 Anymore](#)," *The Washington Post*, October 27, 2025.

¹⁴³ Global Eye, "[Yeonpyeong Island and Korean Conflict](#)," *Global Eye Intelligence*, January 25, 2025.

¹⁴⁴ Sun-ho Lee, "[Two NLL Naval Battles of Yeonpyeong](#)," *The Korea Times*, August 3, 2015.

¹⁴⁵ "[North Korean Artillery Hits South Korean Island](#)," *BBC News*, November 23, 2010.

¹⁴⁶ Donna Miles, "[Naval Exercise Wraps Up In South Korea](#)," *Defense Visual Information Distribution Center*, December 1, 2010.

¹⁴⁷ Colton Jones, "[U.S. Vows Readiness after North Korea Hypersonic Test](#)," *Defense Blog*, October 24, 2025.

recent incident, the test of a hypersonic missile on October 22, 2025, just days before Trump is set to begin his trip to South Korea to meet Lee and Xi Jinping as well as several other countries.¹⁴⁸

The US is likely to place pressure on North Korea. While not yet using the brash language used in his first term to refer to Kim Jong-un, the US has continued to provide assistance to South Korea. During his visit to Japan in October 2025, Trump met with Japan's new Prime Minister Sanae Takaichi. Trump, joined by Takaichi, rallied sailors aboard the USS *George Washington*, celebrated trade and mineral deals with Japan and announced new missile shipments for Japanese fighter jets. Trump also supported Japanese rearmament efforts.¹⁴⁹ Trump and Takaichi also met with the families of people abducted by North Korea. Trump pledged to do everything in his power to get them back.¹⁵⁰ North Korea is likely to interpret this move in a negative way, similarly to Bush's speech when he placed North Korea as part of his "Axis of Evil" speech.

It also remains to be seen how North Korea could respond to the future success of Seoul in the international sphere. The Kim dynasty has tended to respond aggressively to perceived successes in Seoul. One such incident was the bombing of Korean Air Flight 858 in 1987, which killed 115 people.¹⁵¹ It is believed that the attack was carried out by North Korea in response to Seoul hosting the 1988 Summer Olympics. Furthermore, even if the US shows openness to meet Kim, it all depends on Kim willing to meet with Donald Trump or any US officials.¹⁵²

In sum, the role of the US in the region will likely be that of confrontation with China on economic and military power. Increased pressure towards North Korea to denuclearize, combined with meetings between Trump and Kim Jong-un. Readjustments in economic relations with Japan and South Korea as economic deals are sought in exchange for tariff

¹⁴⁸ Dzirhan Mahadzir, "[North Korea Tests Hypersonic Missile System](#)," *US Naval Institute News*, October 23, 2025.

¹⁴⁹ "[Trump Praises Troops and Tariffs Aboard US Carrier in Japan](#)," *BBC News*, October 28, 2025; "[Trump, Japan's Takaichi Sign Deal to Secure Rare Earths Supply](#)," *Al Jazeera*, October 28, 2025.

¹⁵⁰ Hilary Whiteman, "[With a New Leader – and Trump in Town – Japanese Families Whose Loved Ones Were Abducted by North Korea Have Fresh Hope](#)," *CNN*, October 28, 2025.

¹⁵¹ Rupert Wingfield-Hayes, "[The North Korean Spy Who Blew up a Plane](#)," *BBC News*, April 22, 2013.

¹⁵² Daniel DePetris, "[President Donald Trump Wants to Meet with Kim Jong Un Again. But What about Kim?](#)," *Defense Priorities*, October 28, 2025.

reduction.¹⁵³ The US will continue the role of leader of a trilateral security alignment aimed at North Korea and to a lesser extent be aimed at deterring China from invading Taiwan. Regarding North Korea, it will likely remain a tense area for the foreseeable future. The foreseeable future of US relations in Asia is likely to be marked by trade talks between the US and other countries involving tariffs, military exercises between the US and its allies, and possibly summits between Trump and Kim Jong-un. Many of these elements will be studied in the following section.

¹⁵³ Cat Zakrzewski et al., "[Japan's New Leader Tries to Charm Trump with Gold, Golf and Deal on Rare Minerals](#)," *The Washington Post*, October 28, 2025; Anthony Zurcher and Shaimaa Khalil, "[Rare Earths, Nobel Nomination and Cheers: Trump Ends Japan Leg of Asia Tour](#)," *BBC News*, October 28, 2025.

3. THE ROLE OF SOUTH KOREA IN THE ASIAN THEATRE

Until now, the ROK's foreign policy has relied on the motto: "security with the US, commerce with China." In a situation of increasing confrontation between these two countries, this strategy of hedging is no longer viable. Despite the disputes over tariffs—a deal that will soon be materialized—the US will continue to be committed to the ROK's security, with increased South Korean autonomy. Regarding China, trade dependence, minor disputes, as well as its decreasing control over the DPRK, has soured the ROK-PRC relationship. This discrete distancing, though, would include for the moment military support for Taiwan in case of tensions. Lastly, we also tackle the relationship with Japan, now under PM Takaichi. Despite historical grievances, there are some reasons for hope.

3.1. TRUMP 2.0: PROSPECTS FOR THE FUTURE OF THE ROK-US RELATIONSHIP

The US relationship with South Korea is amongst one of the oldest alliances of the US. Since the 1950-1953 Korean War, South Korea has been one of Washington's most important allies in the region. This has continued under President Trump, who has placed more focus on Asia. However, several aspects such as trade and defense are seeing changes as the economic and geopolitical landscape changes.

In regard to South Korea, Trump has initiated trade disputes with countries across the world to renegotiate the trade agreements that he views as damaging to US interests. On July 30, 2025, Trump announced the placing of 15% tariffs on South Korea exports, later increased to 25%.¹⁵⁴ However, before the August 1 deadline the tariffs were to come to effect, Trump announced that the US and South Korea had reached a deal on the tariffs.¹⁵⁵ The US and South Korea have also agreed to release a fact sheet on tariffs and security after the upcoming APEC summit in Gyeongju to sort out lingering issues between the

¹⁵⁴ Jean Mackenzie and Osmond Chia, "[Trump Announces Deal to Impose 15% Tariff on South Korea](#)," *BBC News*, July 31, 2025.

¹⁵⁵ Elisabeth Buchwald, "[Trump Announces Trade Agreement with South Korea Ahead of August 1 Tariff Deadline](#)," *CNN*, July 31, 2025.

US and South Korea regarding defense and trade.¹⁵⁶ Furthermore, the deal includes a proposed \$350 billion US investment fund in exchange for tariff reduction.¹⁵⁷ The negotiations have been affected by Seoul's concerns over the impact the massive investment fund could have on financial markets, particularly in regard to concerns it could devalue the Korean won.¹⁵⁸

During his first term, Trump renegotiated the US-Korea Free Trade Agreement (KORUS). Some changes included more access for US auto exports, harmonization of testing requirements, and Korean recognition of US standards for auto parts.¹⁵⁹ The renegotiation, though less publicized, was Trump's first renegotiation of a trade deal. One of the most negative aspects for South Korea were export restrictions of steel to the US. The agreement also increased the quota of US vehicles to 50,000 cars per manufacturer.¹⁶⁰ Trump will likely seek negotiations and new trade deals between the US and other countries in his second term.¹⁶¹ Trump has also sought to increase US industries in areas such as shipbuilding, areas in which South Korea could help investing.¹⁶² During his visit to the ROK, Trump announced new trade agreements between South Korea and the US. The agreement stated that some South Korean products such as some pharmaceuticals would have little to zero tariffs imposed on them while others such as automobiles had 15%. Aircraft parts would be free of tariffs. Furthermore, the deal is expected to not put South Korean chipmakers at a disadvantage to Taiwan.¹⁶³

In addition to this, the effect the economic disputes Trump has with South Korea might have on relations with North Korea is yet to be determined, though it could make it harder

¹⁵⁶ Min-hee Park and Won-chul Kim, "[Korea, US to Release Fact Sheet on Tariffs and Security after next Week's Summit](#)," *Hankyoreh*, October 22, 2025.

¹⁵⁷ Sang-eun Lucia Lee et al., "[Trump Signals Breakthrough in US-Korea Tariff Talks Ahead of APEC Summit](#)," *The Korea Economic Daily*, October 21, 2025.

¹⁵⁸ Yonhap, "[Lee Says 'carefully' Reviewing Impact on Financial Markets during US Tariff Talks](#)," *The Korea Herald*, October 24, 2025.

¹⁵⁹ Office of the United States Trade Representative, "[Fact Sheet on U.S.-Korea Free Trade Agreement Outcomes](#)," *Office of the United States Trade Representative*, September 2018.

¹⁶⁰ Simon Lester et al., "[Trump's First Trade Deal: The Slightly Revised Korea-U.S. Free Trade Agreement](#)," *CATO Institute*, October 13, 2019.

¹⁶¹ Trevor Hunnicutt and Rozanna Latiff, "[Trump Oversees Truce Signing and Trade Deal Flurry on First Asian Stop](#)," *Reuters*, October 26, 2025.

¹⁶² Sophia Cai and Joe Gould, "['Make American Shipbuilding Great Again': Korea Leans into Shipbuilding as It Woos Trump](#)," *Politico*, October 27, 2025.

¹⁶³ Cynthia Kim et al., "[South Korea releases details of trade deal struck with the US](#)," *Reuters*, October 30, 2025.

to secure South Korean cooperation to deal with North Korea, as both already have two diverging views of how to deal with Pyongyang.¹⁶⁴

Regarding security and defense, during his first term, Trump was vocal about South Korean defense expenditure, trying to get his Asian ally to cover more of the defense expenditure.¹⁶⁵ The pressure Trump has placed on South Korea has awakened fears similar to those in NATO that the US is not willing to defend them in case of attack.¹⁶⁶ The North Korean regime has continued development and testing of nuclear weapons.¹⁶⁷ In 2025, the US has gone further. Under the leadership of Secretary of War Pete Hegseth, the US has started major reorganization programs to prepare the US Military for high intensity conflicts in the future.¹⁶⁸ The restructuring sought to replace older 'Legacy' equipment with newer, more advanced and lethal weapons. When it comes to commands, the White House and Pentagon seek to streamline the process and avoid duplication of tasks by commands by merging headquarters and command positions.¹⁶⁹

Another major change is the US proposal to shift focus for the USFK. While it would not end their primary mission of deterring North Korea, it would allow US Forces in the region to assist US efforts in countering China. The measure has raised opposition in Seoul, which fears that the move could leave South Korea defenseless in case of attack by the North. The troop reductions in the region are not new. Eisenhower withdrew a considerable number of troops to leave only 55,000 and in 1977 as part of the Nixon Doctrine, the US withdrew the 7th Infantry Division, citing that US allies should cover more of their defense.

A fear that has been voiced in Seoul is that China could interpret the US strategic flexibility approach as South Korea siding with Taiwan and the US. Similarly, others are worried that this withdrawal could lead Kim Jong-un, emboldened by Russian assistance,

¹⁶⁴ Ari Hawkins et al., "[Trump's Cash Demands Continue to Bedevil Deal with South Korea](#)," *Politico*, October 28, 2025.

¹⁶⁵ Phil Stewart and Idrees Ali, "[Exclusive: Inside Trump's Standoff with South Korea over Defense Costs](#)," *Reuters*, April 11, 2020.

¹⁶⁶ Jin-Kim Hyung and Tong-Hyung Kim, "[South Korea's President Calls for More Self-Reliant Military as Questions Arise about US Commitment](#)," *Associated Press*, October 1, 2025.

¹⁶⁷ Hyung-Jin Kim and Tong-Hyung Kim, "[North Korea Test-Fires Ballistic Missiles Ahead of Trump's Asia Trip](#)," *Military.Com*, October 22, 2025.

¹⁶⁸ Steve Beynon, "[Here Are All the Big Cuts and Changes Coming to the Army](#)," *Military.Com*, May 22, 2025.

¹⁶⁹ Andrew Feickert, [2025 Army Transformation Initiative \(ATI\) Force Structure and Organizational Proposals: Background and Issues for Congress](#), no. R48606, CRS Reports (Congressional Research Service, 2025).

to miscalculate.¹⁷⁰ Similarly, this could prove problematic for some South Korean politicians, especially the DPK, which seeks a closer approach to North Korea as part of Lee's END policy and attempts to recover aspects and policies of the Sunshine Policy. However, not all the blame can fall on the US. Lee has already caused controversy in the past by voicing criticism of the US deployment of THAAD, one of the few weapon systems capable of intercepting ballistic missiles.¹⁷¹ Japan, another country affected by the North Korean and Chinese rise in the region may not take kindly to the situation. However, other analysts believe that the decision could anchor the US more to the region, putting more pressure on North Korea.¹⁷² Some have interpreted the move by the US as a strategic pivot, rather than a US withdrawal. The move would allow the US to respond more efficiently to threats in the region, allowing the US to be prepared to face threats in the future, not only China.¹⁷³

However, the US is unlikely to reduce troops however, as other than the reports that came out initially in the Wall Street Journal claiming that the US was planning to downsize forces from South Korea, no official notice has been given of US troop withdrawals.¹⁷⁴ Furthermore, the US has continued military exercises with South Korea and their allies despite the publishing of the article that stated that the US was planning the supposed troop withdrawals and the USFK has also conducted exercises with their counterpart in Japan, US Forces in Japan (USFJ).¹⁷⁵ A goal of the new South Korean government is to secure the operational control (OPCON) to be under South Korean command. The US already transferred control of South Korean forces during peacetime in 1984. Furthermore, modernizations of the alliance are not new as previous US presidents have done so to improve capabilities and better reflect changing geopolitical situations in

¹⁷⁰ Victor Cha, "[The Meaning of U.S. Troop Withdrawals from Korea](#)," *Center for Strategic & International Studies*, October 2, 2025.

¹⁷¹ Haye-ah Lee, "[Lee says his opposition to THAAD remains unchanged](#)," *Yonhap News Agency*, December 16, 2021.

¹⁷² Jeongmin Kim and Joon Ha Park, "[What North Korea Stands to Lose If US Forces Korea Expands Mission to China](#)," *NK News*, May 1, 2025.

¹⁷³ Da-gyum Ji, "[Strategic Pivot, Not Pullback, If US Troops Relocate from Korea, Says Harris](#)," *The Korea Herald*, July 1, 2025.

¹⁷⁴ Leo Shane, "[US Forces Korea Commander Defends Troop Levels amid Talk of Cuts](#)," *Military Times*, April 10, 2025; [National Defense Authorization Act for Fiscal Year 2026](#), S.2296, S. Rept. 119-39 (2025).

¹⁷⁵ US Indo-Pacific Command Public Affairs, "Exercise Freedom Edge 2025;" "[US, South Korea, Japan Hold Trilateral Military Exercise amid North Korea Threats](#)," *TRT World*, September 15, 2025; Samantha White, "[Bushido Guardian 25: Trilateral Exercise Kicks off in the Pacific](#)," *US Air Force*, September 29, 2025.

Asia.¹⁷⁶ Previous analysis offered three scenarios: continuous commitment, enhancement of capabilities and reduced role of USFK. The enhancement was believed at the time to be the more likely event. However, the continuous commitment has materialized.¹⁷⁷

Scenario construction: Prospects for USFK (2025-2045)

As we have seen, given how complicated the USFK issue is, in the following pages, we are going to apply the technique of scenario construction to study its future and, more generally, the permanence of the ROK under the US security umbrella. The time frame we selected comprises the coming 20 years. Therefore, it will transcend the presidencies of both Lee and Trump, whose administrations will end foreseeably in 2030 and 2028, respectively.

The first step for our analysis is creating a stakeholder map (Figure 2). We identified nine important actors in the future of USFK and classified them in a matrix according to their interest and their impact on the issue. Only three possibilities were considered: low, medium, or high. Please, note that position within the quadrant does not matter. For instance, we consider that the ROK Armed Forces and Japan are low-impact and high-interest actors, equally. The actors identified were the ROK's government, the US government, the ROK Armed Forces, the DPRK, the People's Republic of China (PRC), Japan, the Republic of China (ROC), Russia and the United Nations Command (UNC).

Having understood the main actors involved in the future of ROK under the US security umbrella, it is time to identify the different variables that will intervene in this process. In order to do so, we elaborated an influence diagram (Figure 3). It was the result of a descriptive and an analytic phase of the present status of the issue at stake. After considering how each variable affects each other, there were two main realizations. On the one hand, there are three main clusters of drivers: those affecting the DPRK's power, those affecting the ROK's power, and those relating to the interest of the US in the Korean Peninsula. On the other hand, the influence of PRC over this issue was less than expected: we had initially classified it as a high-impact and high-interest actor on the stakeholder map.

¹⁷⁶ Andrew Yeo, "[How Trump and Lee Can 'Modernize' the US-South Korean Alliance.](#)" *Brookings.Edu*, October 24, 2025.

¹⁷⁷ Marina Díaz, Lucía Montón and Maula Mostajo, "[South Korea's race against time. Prospectives for 2030.](#)" South Korea: Strategic Analysis Report, *Global Affairs & Strategic Studies*, University of Navarra, May 2021, 12-15.

Building upon our influence diagram, it was time to study the relevance of the drivers identified. We classified 22 different factors into the impact chart (Figure 4), according to their predictability and its impact on the future of USFK. We concluded that there were 6 key uncertainties (low predictability and high impact), 7 stable trends (high predictability and impact) and 9 secondary drivers (low impact). Key uncertainties identified are: DPRK deterrence power, DPRK pivot from PRC to Russia, ROK military autonomy, tensions in the Korean Peninsula, tensions in the Taiwan Strait and development by ROK of a nuclear program. As it happened with Figure 2, position within the quadrant does not define their level of predictability and impact.

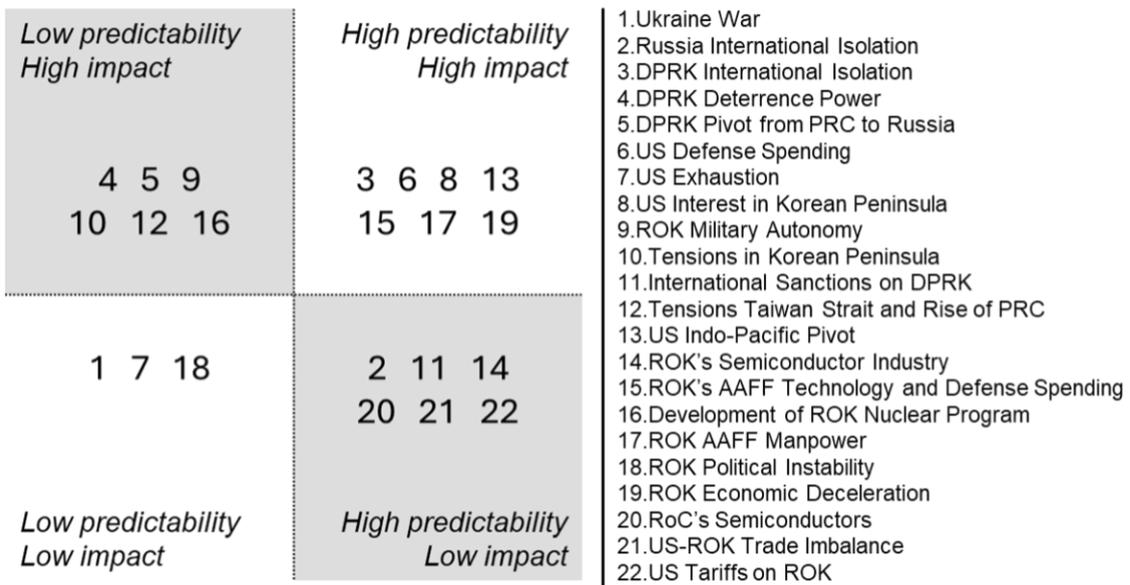


Figure 4. Prospects for USFK. Impact chart (own elaboration).

Out of those key uncertainties, we selected the two that we considered the ones with the greatest impact and unpredictability: tensions in the Korean Peninsula and tensions in the Taiwan Strait. Based on those two drivers, we built a simple scenario matrix with four possibilities (Figure 5): Drums of War (tensions in the Taiwan Strait and in the Korean Peninsula), Peaceful Autonomy (tensions solely in the Taiwan Strait), Peninsular Crisis (tensions solely in the Korean Peninsula), and *Pax Asiatica* (no tensions in the Taiwan Strait nor the Korean Peninsula).

| | |
|--|--|
| <p style="text-align: center;">Drums of War</p> <p>The US tries to reinforce USFK as tensions in Taiwan and Korea rise, though its efforts spread thin and the ROK ends up adopting a more important role in its own defense.</p> | <p style="text-align: center;">Peaceful Autonomy</p> <p>With tensions centered in Taiwan, USFK are dissolved and its troops transferred to other areas of the Pacific. The ROK is completely autonomous in its own defense.</p> |
| <p style="text-align: center;">Peninsular Crisis</p> <p>As tensions in the Korean Peninsula start, USFK gets reinforced to show support for the ROK. The balance between USFK and the ROK Armed Forces is maintained.</p> | <p style="text-align: center;"><i>Pax Asiatica</i></p> <p>A change in PRC's strategy decreases tensions in East Asia. As a consequence, USFK troops are reduced and ROK gets more responsibility in its own defense.</p> |

Figure 5. Prospects for USFK. Simple scenario construction (own elaboration).

The first plausible scenario would be an escalation of tensions in the Korean Peninsula and in the Taiwan Strait, marked by North Korea's ongoing nuclear program and ballistic missile tests and by China's increasing assertiveness over Taiwan. Said assertiveness could take the shape in more serious actions than the naval and air exercises exercised around Taiwan, such as in 1995 after Taiwanese President Lee Teng Hui visited his alma mater, Cornell University, or whenever Taiwan inaugurates a new President. The most likely escalation to the region would be Chinese military actions around the smaller islands the ROC possesses, such as Kinmen, similar to the 1955 and 1958 crises. The primary goal of said incursions would be to test US willingness to defend Taiwan. China would likely request North Korea to initiate military exercises near the border to try to limit US responses and spread them thin. At worst, if the Chinese adventure goes wrong, North Korea could send China troops as it has done in Ukraine for Russia. The first response to said provocations would be US Forces to be placed on alert. The US could relocate some of their forces in Korea or Japan to deter further action by China in the Taiwan Strait and the South China Sea, with the US deploying forces from other parts of the Pacific to reinforce US forces in Korea and Japan. USFK and to a lesser extent USFJ may be forced to spread themselves thin to counter both adversaries but would remain relevant to the defense of US allies. The South Koreans would take a greater role in their defense as some of the US Forces in the Peninsula are relocated elsewhere in the Pacific to counter China while trying to maintain a credible deterrent towards North Korea. We believe this to be the most likely scenario.

Secondly, we envisage the possibility of tensions being limited to the Taiwan Strait. PRC's assertiveness over Taiwan would develop in a way similar to the one described in

the first scenario. However, a fragile DPRK decreases its deterrence power and the tensions in the Peninsula. As China's support to the North Korean regime decreases, considering it more of a liability than any other thing, the viability of the DPRK is at stake, since Russia cannot fulfil the role China had played in the last years. At the same time, the ROK gets reinforced. With the tensions in the Taiwan Strait, South Korean semiconductor industry strengthens and allows for an even better technology for its Armed Forces. With these shifts in mind, the US focuses progressively more on the Taiwan Strait and less on the Korean Peninsula. Ultimately, USFK gets dissolved, and its troops are transferred to either Guam, Japan or even Taiwan. OPCON is handed in to the ROK, and its military gets complete autonomy from the US. In an extreme scenario, South Korea could develop its own nuclear program to increase its deterrence capabilities.

The third plausible scenario is an increase of tensions between the two Koreas while tensions in Taiwan remain stable. USFK would focus all their attention on the deterrence of the DPRK and South Korea would remain under the US Security umbrella. Tensions in the Korean Peninsula could increase as a result of ballistic missile tests or border incidents on the ground, though warning shots on the DMZ by South Korean soldiers or actions such as the DPRK's bombardment of Yeonpyeongdo in 2010 or the maritime incidents such as those occurred in Yeonpyeong in 1999 and 2002 or the 2011 sinking of the Cheonan. The most likely among these possibilities, however, would be border incidents in the DMZ. The USFK and USFJ would remain in the numbers they currently have and could even see increases by rotation of units to bolster them during times of emergency as the US would try to assure its allies of its commitment to protect them. In case of a severe crisis, even troops from the continental US could be rushed to the area to deter aggression. The US and the ROK would likely conduct military exercises with Japan to try and deter Pyongyang from any adventures and USFK would remain a vital asset in the region.

The last scenario we will describe—and the least likely, in our opinion—is that there are no tensions either in the Korean Peninsula or in the Taiwan Strait. In this case, the PRC either suffers an internal crisis that slows down its rise or decides to stop its aggressive stance against Taiwan and favors a peaceful resolution of the dispute. Meanwhile, that same situation plunges the DPRK into instability. Chinese aid to the Kim dynasty gets cut and it even starts enforcing international sanctions. North Korea barely survives thanks to Russian support but lacks the capacity to sustain its nuclear program and any

other deterrent measures. Given this scenario, USFK is mildly reduced and OPCON is transferred to the ROK Armed Forces, in order to save US spending and to focus on other hotspots, though it is still present as a sentinel in East Asia.

In conclusion, we can observe several interesting elements from this scenario setting. Firstly, out of the four plausible scenarios, three culminate in increased South Korean autonomy. However, at the same time, only in one of the scenarios does the ROK completely abandon the US security umbrella. Secondly, all scenarios show a dependency on Chinese actions or lack of action in the region in regard to Taiwan or North Korea. Thirdly, the ROK's development of a nuclear program is only contemplated in a single scenario. Therefore, we can conclude that its likelihood is low. Lastly, we can also conclude, based on the four scenarios, that the US will still be a vital security and political actor in the region for the foreseeable future.

* * *

Based on the information at hand, we can expect the relations between the US and South Korea for the next four years to be marked by economic negotiations between Trump and Lee and increased pressure on China by the US over Taiwan. South Korea is likely to remain under the US security umbrella in order to deter North Korea and to a lesser degree China. South Korea is likely to experience a renewed focus of tension as the Peninsula becomes a frontline of tensions between Beijing and Washington. Furthermore, Lee's pragmatic approach may be affected by the US's bigger picture perspective on the region. Lee may be forced to accept some US security deployments that he opposes such as THAAD and might eventually be pressured by Washington to be more firm in China.

3.2. DISCRETE DISTANCING: CHINA (AND TAIWAN)

Among the countries explained in this Strategic Analysis Report, the PRC is the one that shares the most history with ROK. The historical Kingdom of Joseon, in fact, was a Chinese vassal until 1897.¹⁷⁸ Strong cultural ties and the shared experience of having suffered Japanese imperialism mark important elements to this relation, formally established as diplomatic in 1992.¹⁷⁹ There have been ups and downs ever since, though it is true that they have not been good under the previous administration: from Moon's

¹⁷⁸ Seth, *Korea*, 52–53.

¹⁷⁹ [“Only by Returning to Original Intent Can China-S.Korea Ties Make Steady, Sustained Progress: Global Times Editorial,”](#) *Global Times*, August 25, 2025.

2017 THAAD crises to Yoon's 2023 declaration over the defense of Taiwan in case of PRC attacks.¹⁸⁰ The outlook for the following administration seems to be more positive.¹⁸¹

Currently, there are three factors that influence the ROK-PRC relations: trade, public opinion, and external actors.¹⁸² Firstly, regarding commerce, these two countries have held an FTA since 2015: the China-South Korea Free Trade Agreement (CKFTA), which is focused on goods.¹⁸³ We have already seen that China is the largest commercial partner of ROK, but this situation may even turn out to be one of dependence. This poses a particular challenge for Seoul, particularly as the PRC starts producing high-tech goods.¹⁸⁴ In fact, in 2023, for the first time in 31 years, the ROK recorded a negative trade balance with China.¹⁸⁵

Secondly, public opinion in South Korea is another issue to take into account. In a 2022 poll, the ROK was the country with the worst vision of China: 81% of the respondents held a negative view of Beijing.¹⁸⁶ The reasons behind this figure are many, but among others there have been disputes over the historiography of the Kingdom of Goguryeo, protests regarding transboundary air pollution and disputes over a UNESCO Intangible Cultural Heritage application.¹⁸⁷

Before turning to the influence of external actors in ROK-China's relations, we wanted to tackle an additional problem: the dispute in the Yellow Sea. Though not as intense as the Liancourt Rocks or the Diaoyu/Senkaku islands disputes, there has also been a territorial clash in the sea between South Korea and China since the 1990s. The issue is

¹⁸⁰ Ju-min Park et al., "[S.Korea Summons Chinese Ambassador over Reaction to Yoon's Taiwan Remarks](#)," *Asia Pacific, Reuters*, April 20, 2023.

¹⁸¹ Zhang Han and Shen Sheng, "[Chinese FM Meets Visiting ROK Counterpart in Beijing](#)," *Global Times*, September 18, 2025.

¹⁸² Min Ye, *China-South Korea Relations in the New Era: Challenges and Opportunities* (Lexington Books, 2017), 141–45.

¹⁸³ Ye, *China-South Korea Relations in the New Era*, 99, 119.

¹⁸⁴ See-Won Byun, "[Interdependence, Identity, and China–South Korea Political Relations: Asia's Paradox](#)," *Asian Survey* 61, no. 3 (2021): 473–99; Alec Chung, "[A Shift in the Trade Structure and Its Impact on China–South Korea Relations](#)," *The Korean Journal of International Studies* 23, no. 2 (2025): 187–217.

¹⁸⁵ Kotaro Hosokawa, "[South Korea Records Its First Trade Deficit with China in 31 Years](#)," *Nikkei Asia*, January 1, 2024.

¹⁸⁶ Ricard Q. Turcsanyi and Esther E. Song, "[South Koreans Have the World's Most Negative Views of China. Why?](#)," *The Diplomat*, December 24, 2022; Rishab Rathi, "[Lee Jae-Myung: Opportunity for a China-South Korea Reset?](#)," *Geopolitical Monitor*, June 18, 2025.

¹⁸⁷ Jae Ho Chung and Jiyeon Kim, "Is South Korea in China's Orbit? Assessing Seoul's Perceptions and Policies," *Asia Policy*, no. 21 (2016): 136–37; Turcsanyi and Song, "South Koreans Have the World's Most Negative Views of China. Why?"; Ye, *China-South Korea Relations in the New Era*, 82–83.

that the PRC claims a further Exclusive Economic Zone (EEZ) than that corresponding to the equidistant line proposed by Seoul.¹⁸⁸ There is a China-ROK Fishery Agreement, signed in 2000, which divided the Yellow in a provisional measures zone (PMZ) and two transitional zones (TZs). Negotiations on the definition of the EEZs are ongoing but there is no agreement yet.¹⁸⁹ In the meantime, there have also been several tensions such as the construction by ROK of the Ieodo Ocean Research Station in the disputed Socotra Rocks (2003), the extension by China—and later by Seoul—of their Air Defense Identification Zone (2013), and the recent construction of aquaculture facilities in the PMZ by China (2024-...), not foreseen in the 2000 Agreement.¹⁹⁰ The low intensity of this dispute leads us to think that it will not escalate severely.

Lastly, when it comes to external actors influencing relations with the PRC, we must talk about the US, the DPRK and Taiwan. Let us start by saying Lee's approach to diplomacy is, above all, pragmatic. Therefore, he will avoid major confrontations with China and he has even presented certain signs of cordiality such as reciprocal visa exemptions for tourists.¹⁹¹ However, he affirmed in August that it is time to put an end to the ROK's balancing strategy: they can no longer pursue "a position of security with the US and economy with China."¹⁹² This shift was already started by Yoon, though in a much more vocal way.¹⁹³ One of the underlying reasons is that, as the DPRK veers further away from the control of the PRC and fumbles a possible alliance with Russia, the ROK's interest in China, its usual interlocutor with the North Korean regime, decreases.¹⁹⁴ This explains

¹⁸⁸ Ye, *China-South Korea Relations in the New Era*, 76–79; Chung and Kim, "Is South Korea in China's Orbit?," 139.

¹⁸⁹ Huaigao Qi, "[Maritime Delimitation Between China and South Korea in the South Yellow Sea](#)," *Ocean Development & International Law* 54, no. 1 (2023): 26–62.

¹⁹⁰ Senan Fox, *China, South Korea, and the Socotra Rock Dispute: A Submerged Rock and Its Destabilizing Potential*, Palgrave Pivot (Springer Nature Singapore, 2019); Rostamaji Korniwawan, "[Current Status of Relations Among China, Japan, and South Korea](#)," *Modern Diplomacy*, May 21, 2025; Jennifer Jun and Victor Cha, "[Korea-China Standoffs in the PMZ](#)," *Beyond Parallel*, October 27, 2025.

¹⁹¹ Si Cheng, "[Mutual Visa-Free Policies Prove a Win-Win for China, S. Korea](#)," *China Daily*, October 30, 2025; Jihoon Lee and Joe Cash, "[South Korea Begins Visa-Free Entry for Chinese Tourist Groups](#)," *China, Reuters*, September 29, 2025.

¹⁹² Jae-Young Han, "[S.Korea's Lee Signals End to 'Security with US, Economy with China' Policy; to Hike Defense Costs](#)," *The Korea Economic Daily*, August 25, 2025.

¹⁹³ In this sense, it was predicted under the second scenario forecasted in María G. Fajardo, Marcelina Kropiwnicka and Matilde Romito, "[South Korea. A pawn no major power is willing to sacrifice](#)", Korea: Strategic Analysis Report, *Global Affairs & Strategic Studies*, University of Navarra, May 2021, 37-38.

¹⁹⁴ Ye, *China-South Korea Relations in the New Era*, 129.

why Yoon adopted a policy of “anything but Moon Jae-in,”¹⁹⁵ which we consider will be prolonged though in a more discrete way.

One of the domains where we may encounter a change with respect to Yoon is on the issue of Taiwan. As we have already shown, the former President stated in an interview that he would oppose a change in the status quo by force when it comes to Taiwan.¹⁹⁶ Such a declaration is not to be expected under the Lee administration due to his pragmatic approach. Some analysts argue that he could pursue a commercial agreement with the ROC, but not a defense alliance.¹⁹⁷ Direct intervention of the ROK Armed Forces in that scenario is doubtful for the moment. However, allowing USFK to intervene is different and more plausible, since it would allow for a greater autonomy of the South Korean Military in its defense, as we have already seen.

In sum, recent developments have pushed the ROK to reconsider its relations with the PRC. Trade dependence, cultural disputes as well as territorial disputes have soured a relationship that was mainly based on commerce. The geopolitical fluctuations in the region have turned these minor disputes into the reason for a shift towards the US. Proximity to China is no longer that useful to tackle the DPRK issue. This change in the ROK’s outlook, however, is still in the making and no big actions can be expected in the defense of Taiwan in case of a PRC attack or blockade.

3.3. IDENTITY COMPLICATING POLITICS: THE RELATIONSHIP WITH JAPAN

South Korea’s relationship with Japan has been marked by the lingering historical tensions between the two countries since the Japanese occupation. Issues such as Japanese brutality, Comfort Women, visits by Japanese politicians to the Yasukuni Shrine, and the ongoing territorial dispute over Dokdo/Takashima Island make Japan and South Korea’s a complex scenario. Both nations face new challenges, including North Korea’s nuclear program and China’s rise in the Indo-Pacific. Both nations are heavily reliant on the US security umbrella for conventional and nuclear defense. Just as South Korea has USFK, Japan has the USFJ.¹⁹⁸ Military cooperation between Japan and the ROK is vital for the

¹⁹⁵ Gong Keyu, “The Yoon Suk-Yeol Administration and China-South Korea Relations: A Chinese Perspective,” *The Journal of East Asian Affairs* 35, no. 1 (2022): 70.

¹⁹⁶ Park et al., “S.Korea Summons Chinese Ambassador over Reaction to Yoon’s Taiwan Remarks.”

¹⁹⁷ Elaine Hou and James Lo, “[New South Korean Government Unlikely to Commit to Taiwan’s Defense: Expert](#),” *Focus Taiwan-CNA*, June 19, 2025.

¹⁹⁸ Ministry of Foreign Affairs of Japan, “[Deployment of US Forces in Japan](#),” September 2019; “[US Forces Japan Official Website](#),” US Forces Japan, 2025.

US, with a trilateral approach to regional security, particularly against North Korea.¹⁹⁹ This includes trilateral military exercises.

However, the Japanese relationship with South Korea is likely to be tense for the next few years. On October 21, 2025, Sanae Takaichi, a member of Japan's Liberal Democratic Party (LDP), was elected as Japan's new Prime Minister.²⁰⁰ An admirer of Margaret Thatcher and protégée of the late Shinzo Abe, she has declared that she will take a harsher stance on China and increase cooperation with the US.²⁰¹ During her first interview, Takaichi stated that she sees South Korea as a key neighbor. She also affirmed that she wanted to build on the actions and progress made by previous administrations.²⁰² She also voiced her willingness to meet President Lee in Gyeongju, during the APEC summit.²⁰³

Lee had a good relationship with Japan's previous Prime Minister, Shigeru Ishiba. During his first summit with Ishiba, Lee expressed his desire for deepening his relationship with Japan. This rapprochement is valuable for the US, but it has also created concern in China and North Korea.²⁰⁴ Takaichi has been trying to reduce preoccupations in Seoul and Tokyo that her conservative government could damage ties with South Korea. Takaichi, like Shinzo Abe had done in the past, visited the Yasukuni Shrine, an event that has always strained tensions in South Korea, especially with the Democratic Party of Korea (DPK), which Lee belongs to.²⁰⁵

However, the relationship between Seoul and Tokyo could be harmed by historical grievances like the restitution for the Second World War transgressions, particularly the Comfort Women. In July 2019, South Korea removed Japan from its list of countries awarded preferential treatments. Reasons given have varied for the cause of the crisis. From accusations of Japan trading prohibited materials to North Korea in breach of UN

¹⁹⁹ Indo-Pacific Defense Forum, "[Japan, South Korea Highlight Importance of U.S. Alliance to Deter Regional Aggression](#)," *Indo-Pacific Defense Forum*, October 3, 2025.

²⁰⁰ Leo Lewis, "[Sanae Takaichi, Japan's Iron Lady Is Set to Surprise](#)," *Financial Times*, October 23, 2025.

²⁰¹ Wesley Alexander Hill, "[Why China Is Worried About Sanae Takaichi, Japan's New Prime Minister](#)," *Forbes*, October 21, 2025.

²⁰² Han Jane, "[Japan's New PM Strikes Friendly Tone, Calls S. Korea 'Key Neighbor'](#)," *The Korea Times*, October 22, 2025.

²⁰³ Jiji News, "[Takaichi, Lee Likely to Meet in Gyeongju, South Korea](#)," *Nippon.Com*, October 24, 2025.

²⁰⁴ Hyunsu Yim and Kantaro Komiya, "[South Korea's Lee Cites 'inseparable' Relationship with Japan in First Summit](#)," *Reuters*, June 18, 2025.

²⁰⁵ Kenji Yoshida, "[Yasukuni Shrine Returns to Spotlight as Takaichi Government Takes Off](#)," *Japan Forward*, October 23, 2025.

sanctions to breakdown of low-level talks and violations of export controls. However, some believe that the cause was a decision by the ROK Supreme Court that Japan had to compensate victims of forced labor during the occupation.²⁰⁶ This affected South Korea's technology and semiconductor industry and other industries such as car manufacturing and domestic appliances that required semiconductors and chips.²⁰⁷ Furthermore, South Korea and Japan nearly broke the General Security of Military Information Agreement (GSOMIA), an information sharing agreement between both countries which is valuable to the trilateral approach to counter the DPRK and China.²⁰⁸ It was only due to pressure from US President Donald Trump that prevented the collapse of the GSOMIA.²⁰⁹ In the end, the main issues of the dispute were not solved until 2022, when President Yoon sought to improve the relationship with Japan, prioritizing the alliance over historical grievances. This led to the reinstatement of the ROK in the preferential treatment list by Japan in 2023.²¹⁰

Despite this previous experience, hope remains in Seoul that they will be able to continue the momentum established during Ishiba's tenure.²¹¹ Takaichi, has surprisingly, avoided visiting the Shrine on this year's Annual Fall Rites or Autumn Festival, only sending a ritual offering.²¹² Takaichi is likely seeking to avoid damage to Japan's relationship with South Korea and China early in her term. There are fears within some analysts that there could be a repeat of Abe's 2013-2014 policies that rattled relations between Seoul and Tokyo and tested the US trilateral approach to the region. There is uncertainty about how Takaichi's views toward China, while aligning with those Trump has, will affect the relationship.²¹³ In addition, Takaichi, like Shinzo Abe and other politicians in Japan,

²⁰⁶ Helena Tian, "[South Korea Supreme Court Orders Japan Companies to Compensate Former Victims of Forced Labor](#)," *JURISTnews*, December 31, 2023.

²⁰⁷ Stephen Ezell, "[Understanding the South Korea-Japan Trade Dispute and Its Impacts on U.S. Foreign Policy](#)," *Information Technology & Innovation Foundation*, January 16, 2020.

²⁰⁸ Lindsay Maizland, "[The Japan-South Korea Trade Dispute: What to Know](#)," *Council on Foreign Relations*, August 5, 2019.

²⁰⁹ Motoko Rich and Edward Wong, "[Under U.S. Pressure, South Korea Stays in Intelligence Pact With Japan](#)," *New York Times*, November 22, 2019.

²¹⁰ Mari Yamaguchi, "[Japan to Reinstate South Korea as Preferred Trade Nation from July 21 as Two Sides Improve Ties](#)," *Associated Press*, June 27, 2023.

²¹¹ Seung-yeon Kim, "[\(LEAD\) S. Korea Hopes to Continue Momentum for Future-Oriented Ties with Japan under New PM Takaichi](#)," *Yonhap News Agency*, October 21, 2025.

²¹² Jiji News, "[Takaichi Skips Yasukuni Visit during Autumn Festival](#)," *The Japan Times*, October 20, 2025.

²¹³ ASAN Forum, "[Country Report: Japan \(Sep 2025\)](#)," *ASAN Forum*, October 15, 2025; Himari Semans, "[Takaichi Seeks to Dispel Fears Seoul-Tokyo Ties Could Falter under Her Government](#)," *The Japan Times*, October 22, 2025.

support revising Article 9 of the 1947 Constitution, which prohibited Japan from forming an army.²¹⁴ In Japan, public attitudes to the reform of the Constitution has varied, sometimes between sixty and forty percent of support, depending on the time and the source.²¹⁵

Takaichi voiced in her first policy speech that she aims to improve relations with South Korea and expand work on the framework of the US-South Korea-Japan trilateral approach to security. However, it remains unclear how it could maneuver Seoul's economic dependency on China, as Takaichi explicitly mentioned North Korea, China, and Russia as major threats.²¹⁶

Japan has faced, like South Korea, the issue of tariffs from the US. Japan agreed to provide loans and guarantees in the form of Foreign Direct Investment (FDI) to finance projects in exchange for removal of the tariffs. Japan will transfer the funds within forty-five days of the US choosing the project where the money will be invested on. South Korea has been unable to carry out a similar strategy due to fears that dollar demand could devalue the won.²¹⁷ However, Seoul has voiced interest to learn of the Japanese deal.²¹⁸

Another issue that has caused controversy and some political tension, though not to the extent of the Comfort Women, is the dumping of wastewater to the ocean from the Fukushima Nuclear Power Plant in 2023.²¹⁹ The event triggered major protests in South Korea as there were fears of contamination and public health from the treated water. The water tanks holding the water from the nuclear reactors damaged by the 2011 earthquake and tsunami had reached maximum capacity and, after extensive decontamination, Japan decided to release some of the water into the sea. Ever since Japan announced the plan in

²¹⁴ Institute for Security & Development Policy, "[Amending Japan's Pacifist Constitution](#)," *Institute for Security & Development Policy*, April 2018.

²¹⁵ Council on Foreign Relations, "[Japanese Public Attitudes on Constitutional Revision](#)," *Council on Foreign Relations*, 2018.

²¹⁶ Hanjin Lew, "[It's Time to Form a Japan-South Korea Military Alliance](#)," *Asia Times*, October 25, 2025.

²¹⁷ Jihoon Lee and Yena Park, "[Explainer: Why South Korea Cannot Make the Same US Trade Deal as Japan](#)," *Reuters*, October 16, 2025.

²¹⁸ Yena Park and Jihoon Lee, "[South Korea Says to Finalise US Trade Deal by Learning from Japan Agreement](#)," *Reuters*, September 8, 2025.

²¹⁹ "[S. Koreans Shout Opposition to Japan's Discharge of Fukushima Nuke Wastewater](#)," *XinhuaNet*, May 21, 2023.

2021, there has been friction between Seoul and Tokyo. The DPK voiced opposition to the plan, while South Korea then governing PPP accepted the Japanese decision.²²⁰

Politically, current South Korean and Japanese leaderships are not dissimilar to those that saw the 2019 crisis occur. The DPK in South Korea and LDP in Japan were the same parties in power when the 2019 crisis occurred. The DPK tends to be more assertive and sensitive to historical grievances with Japan. The LDP is nationalistic, with politicians of the party frequently visiting the Yasukuni Shrine, creating rifts with South Korea when the DPK is in power. Despite Takaichi's promises to improve relations with Seoul, the lingering historical grievances and the DPK's role in the equation make the relation a volatile one, with US mediation necessary to ensure the allies stay together.

As a whole, it is likely that Japan and South Korea will be somewhat tense, as the unresolved issues such as Dokdo-Takeshima and the issue of the Comfort Women remain thorns. Furthermore, Lee and his party may be more prone to respond to visits to Yasukuni Shrine by Takaichi and members of the LDP. There are chances that another trade war such as that of 2019 could occur, as Lee's government in Seoul is prone to respond negatively to the situation. As mentioned before, the US will have to take the role of a balancing actor in the region to prevent the collapse of the alliance. However, the rising power of China and the threat posed by North Korea would make the more hawkish Takaichi prioritize Seoul-Tokyo relations over previous grievances.

²²⁰ Yeonsu Lee, "[The Fukushima Water Release and South Korea: It's Complicated](#)," *9DASHLINE*, December 15, 2023.

CONCLUSIONS

Based on the research and information, we can conclude that South Korea faces new challenges in the region, both internal and external. Internal challenges range from social issues such as polarization, economic deceleration, an aging population, and lingering historical grievances that affect its foreign policy. South Korea's political system suffered a shock after the 2024 Martial Law crisis and ongoing polarization has left a mark in South Korean politics, tensions lingering from the transition to democracy in the 80s. The economy has stagnated, with major competitors in manufacturing industries dominated by South Korea—namely, semiconductors—have risen, further affecting South Korea's stagnating economy. Another problem faced by Seoul is the increasing competition in soft power. Japan, China, and the US are major soft power competitors in entertainment. Furthermore, cultural pushback in African countries and the Middle East to South Korean soft power, seen as colonialism or incompatible with Islamic values have created challenges to the Korean Wave's momentum. Despite these challenges, South Korea remains a major soft power actor. Another major challenge affecting South Korea is the low birth rate. Due to low migration, South Korea has been the hardest hit of all the Asian countries when it comes to demographic decline, creating uncertainty about future economic and security prospects.

However, the greatest challenges South Korea faces are external. Traditionally Seoul has hedged its economic links to China with the dependency of US security needs. However, the changing international landscape, marked by increased conflict and tensions in the post-1945 world order has made said position unsustainable. The rise of China as a major economic and military power in the region, increasing pressure on Taiwan and the return of Donald Trump to the White House has made the hedging strategy unsustainable, with South Korea prioritizing the US over China. These events have made South Korea more vulnerable to great power conflict, exacerbated by North Korea continuing its nuclear program and ballistic missile tests, increasing tension in the region. Furthermore, North Korea has ceased to be a pariah in the international system as Russia and Pyongyang have strengthened their links, after the 2022 invasion of Ukraine, placing the two Koreas in opposing sides of the global power dynamics. Besides, the wave of reforms in traditional relationships in the region is not limited to the US or China. Japan, under Prime Minister

Takaichi means South Korea must tread carefully its relations with its neighbors, who are also starting to view China as a threat. The assertiveness of China over Taiwan will likely be a recurring trend in the near future as Seoul's position over whether to assist Taiwan in case of war remains partial: it could allow for the deployment of the USFK, but it is doubtful it will deploy the ROK Armed Forces.

The foreseeable future is likely to be one marked by US-China confrontation, with South Korea and Japan on the forefront of the great power competition for the Indo-Pacific. Relations with North Korea are likely to remain tense in the years to come. Solving external problems, though, will require facing important internal challenges of social nature.

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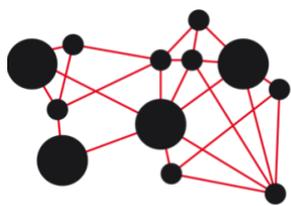
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