

KOREAN PENINSULA: Kim-Putin ties raise stakes for South Korea, US

- Kim's Russia visit was notable for reported talks about cooperation on satellite, submarine, and ICBM technologies, and also raised concerns about Moscow supplying weapons-adjacent nuclear fuel to Pyongyang.
- If the DPRK steps up arms supplies to Russia and cooperation intensifies, it could lead the ROK to supply lethal arms to Ukraine, further catalyze South Korea's fast-growing defense exports sector, and incentivize Seoul to join Aukus.
- Closer DPRK-Russia ties weakens US-ROK efforts to enhance deterrence and could pull Beijing closer to Pyongyang; Seoul also worries about what the 2024 US elections could mean for the alliance.

Six-day visit

Kim Jong-un's [visit this month to Russia](#) lasted twice as long as his previous trip there in 2019. Kim's heavily armored train made stops for tours of facilities hosting jet fighters, rockets, strategic bombers, and a guided missile frigate. After hours, Kim also found time to attend the ballet *Sleeping Beauty* and visit an aquarium with a performing walrus.

No public agreements were announced during the visit, but reports suggest that many issues of potential cooperation were discussed—from food, energy, and munitions for Russia's war in Ukraine, to military satellite technology, nuclear-powered submarines, and even intercontinental ballistic missile technology for the DPRK. Optimists hope that Moscow would not be foolish enough to supply its small neighbor with this broad selection of military technologies, all of which would be in violation of existing United Nations Security Council (UNSC) resolutions.

A further concern is that Russia could provide fuel for North Korean nuclear reactors. This would give Pyongyang a reliable source of nuclear fuel that could also be converted to produce fissile material for weapons. Such a transfer could potentially be achieved without technically being in violation of UNSC resolutions or the nuclear non-proliferation treaty.

Defense and industrial implications for ROK

If North Korea became a regular arms supplier to Russia, it would greatly reduce obstacles to South Korea starting to provide lethal aid to Ukraine. One of President Yoon Suk-yeol's national security advisors at a conference in South Korea recently underlined that such a course of action would be possible.

This in turn could provide a springboard for South Korean defense manufacturers to further boost exports of tanks, armored vehicles, artillery, trainer jets, and other equipment to democratic partners. South Korean defense exports rose from around USD 7bn in 2021 to USD 17bn in 2022, with Poland and most recently Australia among the major buyers. With the backing of the Yoon administration, Korean manufacturers are eager to further grow their global market share, touting quick delivery times, NATO standard compliance, price competitiveness, and a willingness to locate production facilities in the purchasing country.

If Russia were to supply nuclear submarine technology to North Korea, South Korea would give serious consideration to applying to join the Aukus pact with the United States, the UK, and Australia. Seoul has rapidly built up its indigenous submarine capabilities in the last three decades and now has about twenty diesel-electric boats, but it would not want to fall behind if Pyongyang gained the significant performance advantages that come with nuclear propulsion.

Implications for the alliance

The Kim-Putin dynamics also have important implications for the US-ROK mutual defense alliance, which saw its 70th anniversary on 1 October. Enhancements to DPRK capabilities could negatively impact efforts to address the so-called 'deterrence deficit', which Washington and Seoul have recently sought to narrow through the [Washington Declaration](#)

and the Nuclear Consultative Group (NCG) launched this year. The Declaration and the NCG remain useful for now, but limitations could be exposed if Moscow-Pyongyang cooperation intensifies.

Another implication is that the already-remote possibility of restarting dialogue between the US and North Korea has further receded now that Kim has found a friend in Putin. Moreover, China is now likely to more actively court North Korea to balance Russian influence, further reducing any incentive for Kim to seek fresh talks with the US. The best hope for liberal democracies of engaging with the DPRK might be through Japan. Tokyo reportedly held informal talks with Pyongyang earlier this year to sound out the possibility of a summit-level meeting, though it is unclear if any substantive progress was made.

For South Korea, concern over DPRK-Russia ties is being compounded by rising uncertainties about US domestic politics and what the outcome of the 2024 presidential election could mean for the alliance. Memories of the 2017-2021 Trump presidency linger in Seoul, including public demands to massively increase cost-sharing payments for stationing US troops in South Korea, and reports of private threats to pull US troops out of the peninsula entirely. Joint military exercises might also be under threat in any second Trump term.

One practical option to better 'Trump-proof' the alliance would be to bring forward the renewal of the 2021 iteration of the Special Measures Agreement that outlines financial parameters around US military presence in South Korea. The current agreement is to expire in December 2025.

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