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Shoring Up South Korea's National Security Apparatus

Chung Min Lee

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Carnegie Endowment for International Peace
Publications Department
1779 Massachusetts Avenue NW
Washington, DC 20036
P: + 1 202 483 7600
F: + 1 202 483 1840
CarnegieEndowment.org

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Summary

In July 2023, Koreans will mark the seventieth anniversary of the end of the Korean War. But a durable and just peace continues to elude the Korean Peninsula. North Korea is accelerating its nuclear weapons program. China's economic rise has triggered a major military buildup by the People's Liberation Army (PLA). The war in Ukraine has heightened tensions around Taiwan. And China is determined to become the preeminent military power in East Asia. But it is not just traditional security threats that worry South Korea. Seoul is critically dependent on free trade, foreign oil and natural gas, and global supply chains. As one of the world's major semiconductor producers, South Korea sees that growing U.S.-China decoupling and Washington's rush to build its own semiconductor fortress puts South Korean firms in the middle of a new fault line. In more ways than one, it's time for the Republic of Korea (ROK) to undertake a comprehensive review of its national security system and implement, as warranted, across-the-board reforms.

The primacy of economic and technology-focused intelligence is gaining critical prominence after the global pandemic and growing supply chain vulnerabilities compounded by the war in Ukraine. Yet South Korea's ability to forge a more comprehensive and bipartisan national security strategy is stymied severely by endemic political polarization that has only deepened in 2022. President Yoon Suk Yeol has spearheaded a strengthening of the U.S.-ROK alliance as a key element of his foreign and defense policies in addition to highlighting Korea's shared values with other key liberal democracies. This is a positive turn that must be maintained. At the same time, the opposition Democratic Party that continues to have a majority in the National Assembly has blocked virtually all new bills proposed by the Yoon administration.

The Yoon government faces major headwinds. Most importantly, however, North Korea has continued with unprecedented provocations such as sustained ballistic missile tests since January 2022. Pyongyang also declared a new nuclear doctrine insisting that North Korea is a nuclear weapons state, regardless of whether the international community accepts it or not. The reason why South Korea's national security system needs an overhaul is because of rising vulnerabilities and the emergence of new drivers, including:

- a nuclear-armed North Korea with tactical nuclear warheads, including submarine-launched ballistic missiles (SLBMs);
- China's accelerated military modernization and buildup that could severely undermine South Korean as well as U.S. Forces Korea (USFK) and U.S. Forces Japan (USFJ) operations in a major conflict on the Korean Peninsula;
- deepening U.S.-China strategic rivalry and competition in military, economic, and technological domains;
- the growing importance of economic security and, increasingly, the securitization of critical technologies and matching intelligence capabilities;
- critical manpower shortages in the armed forces due to demographic shifts and the need to optimize technology-intensive modernization, coupled with enhanced warfighting capabilities;
- the unparalleled importance of technology firms, including defense corporations, in shaping the contours of AI-driven military modernization;
- domestic political shifts in the United States that could significantly impact the longer-term efficacy of U.S. extended deterrence;
- South Korea's growing exposure to key regional contingencies, such as a massive military crisis in Taiwan and out-of-area threats (such as the ongoing war in Ukraine);
- rising opportunity costs owing to deepening political enmity between the major political parties and polarization that severely constraints the building of a more bipartisan national security paradigm; and
- the need to build and strengthen secure channels of communication and collaboration with key allies and partners across the world, especially in the Indo-Pacific, the EU, and the North Atlantic Treaty Organization (NATO).

As South Korea looks ahead, it's time to create a national security review commission that covers all facets of national security, given that such an effort has never been undertaken by any South Korean government. Since the restoration of democracy in 1987, every administration has created a defense reform commission, but no government has ever conducted a bottom-up review of South Korea's overarching national security system. Even after North Korea's first nuclear test in 2006 and the sinking of a ROK naval vessel in 2010, no comprehensive national security review was undertaken. Specifically, such an assessment should include the following:

- a whole-of-government approach that encompasses all critical elements of national security;
- a thorough assessment of South Korea's mid- to longer-term intelligence requirements and needs;
- a review of existing decisionmaking structures and national security-related ministries and agencies and, if necessary, adopting organizational reforms including the setting up of new offices or agencies;
- an assessment of the necessity and desirability of forming an economic and technology security committee within the National Security Council to spearhead all-source collection and coordination of intergovernmental guidelines and policies;
- the creation of new channels of communication and cooperation of critical economic and technology intelligence and information with the active participation of government-funded research institutes;
- enhanced government and private sector cooperation on economic and technology intelligence, while fully respecting privacy issues and necessary firewalls;
- strengthened national security cooperation, including the economic, defense, and technology sectors, with key allies and partners such as members of the Association of Southeast Asian Nations (ASEAN), Japan, Australia, NATO members, and major partners in the Middle East;
- a published national security strategy white paper within the first year of a new administration.

Is Business as Usual Sustainable for South Korea?

Seventy-two years after the outbreak of the Korean War in 1950, durable peace continues to elude the Korean Peninsula. North Korea is accelerating its nuclear weapons program. China's economic rise has triggered a major military buildup by the PLA. The Russian invasion of Ukraine has heightened tensions around Taiwan. And China is determined to become the preeminent military power in East Asia. But it is not just traditional security threats that worry South Korea. Seoul is critically dependent on free trade, foreign oil and natural gas, and global supply chains. As one of the world's major semiconductor producers, South Korea sees that growing U.S.-China decoupling and Washington's rush to build its own semiconductor fortress puts South Korean firms in the middle of a new fault line. If these military, economic, and technological challenges weren't enough, South Korea is also beset by the world's lowest birth rate, its status as the fastest-aging society among the developed economies, and exponentially rising social welfare costs.¹

The last time South Korea came under North Korean attack was when a South Korean naval vessel, the *Cheonan*, was sunk by a North Korean submarine in April 2010. In October 2010, North Korean artillery hit Yeonpyeong Island in the Western Sea. While both attacks happened when then president Lee Myung-bak, a conservative, was in office, the government didn't conduct a full-scale national security review. In hindsight, these strikes should have prompted the Lee administration to push through a bipartisan national security review with matching institutional changes including a wholesale reassessment of South Korea's defense posture and the making of a new Korea doctrine. More recently, on November 2, 2022, a North Korean missile that was part of a larger barrage crossed the South-North

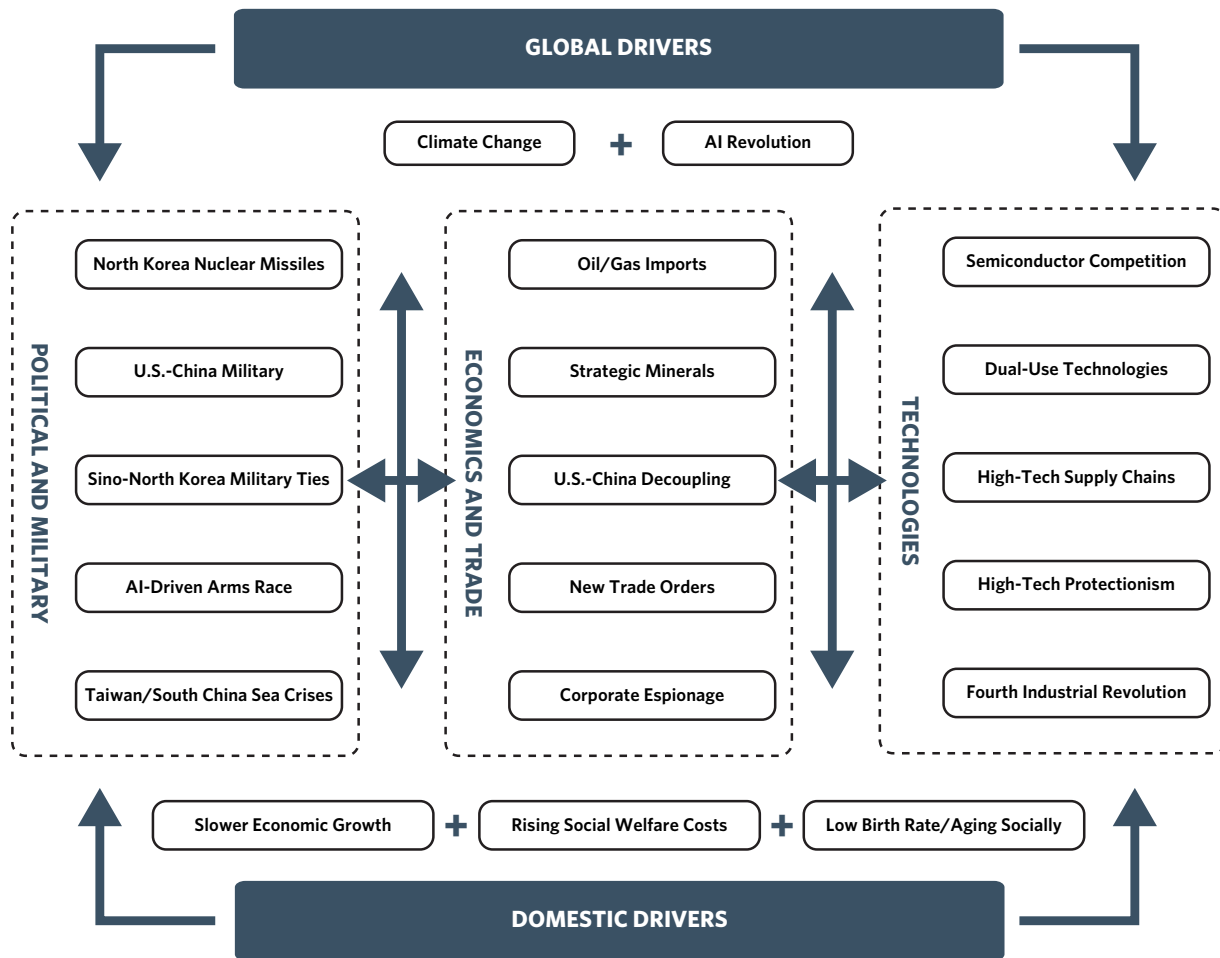
maritime border, known as the Northern Limit Line (NLL), for the first time since the Korean War. Of several short-range ballistic missiles fired by North Korea, one missile fell in the high seas 26 kilometers (16 miles) south of the NLL and 167 kilometers (104 miles) from Ulleung Island. In response, the South Korean Air Force's F-15K and F-16K fighters fired three precision-strike missiles into the high sea north of the NLL. This was also the first time that South Korean missiles were fired across the NLL.²

Most importantly, after North Korea conducted its first nuclear test on October 9, 2006, the government of then president Roh Moo-hyun failed to undertake any meaningful countermeasures. Progressives, including former president Kim Dae-jung, argued prior to the 2006 nuclear test that North Korea did not have any intention of developing nuclear weapons. After North Korea crossed the nuclear threshold, however, Kim and other progressive politicians asserted that Pyongyang had every intention of denuclearizing since nuclear weapons were a bargaining tool to negotiate with the United States. North Korea's first nuclear test in 2006 and its armed attacks in 2010 should have compelled both conservative and progressive South Korean governments to reassess South Korea's national security framework.

Fast forward to 2022, and North Korea's nuclear weapons arsenal has continued to grow. And while not yet fully operational, North Korea has nuclear-tipped SLBMs. To be sure, South Korea has not just stood by. In October 2022, the ROK military released footage of a Hyunmoo-5 medium-range ballistic missile with a reported conventional payload up to 8 tons and the ability to reach a target 100 meters (nearly 330 feet) underground.³ This newest missile is the most lethal in the ROK inventory as part of a South Korean triple axis to decapitate the North Korean leadership. But advanced weapons are only one dimension of a nation's comprehensive national security posture. Today, outstanding geopolitical, geoeconomic, and geotechnological threats are hitting South Korean shores simultaneously. While the ROK has faced key economic crises before (such as the 2008 global financial crisis and the 1997 Asian financial crisis or much earlier ones like the oil embargo by the Organization of Petroleum-Exporting Countries [OPEC] of the early 1970s), it has never before faced enormous dislocations, disruptions, and crises all at the same time as illustrated in figure 1.

Asia is a major driver and innovation hub of the global economy, but it simultaneously has the world's highest concentration of military hotspots, a burgeoning arms race, and intense nationalistic and ideological disputes.⁴ And South Korea is right on, or very close to, some of the region's most intense geopolitical, geoeconomic, and geotechnology fault lines. No other region in the world is both an enabler and a disrupter at the same time to this degree. Three additional traits can be added to this picture. First, there is a growing politicization of major economic and technology policies fueled by U.S.-China decoupling, intensifying high-technology competition, and the push for new global standards. Second, there has been a breakdown of traditional barriers and a new, unparalleled degree of connectivity between a diverse range of threats that curtails policy responses. Third, exponential demands for

Figure 1. South Korea's Hybrid Threats and Expanding National Security Space



intelligence collection and analysis are growing in tandem with bureaucratic inertia that at times inhibits wider and deeper collaboration between different parts of government. With South Korea located right in the middle of these growing U.S.-China fault lines, there is arguably no other major Asian player that faces such a daunting landscape. For this reason and many more, Seoul must undertake a fundamental review of its national security posture and enact crucial organizational, legislative, and structural national security reforms.

South Korea weathered a massive economic meltdown during the Asian financial crisis of 1997–1998. The South Korean government undertook massive restructuring in addition to critical financial reforms under Kim Dae-jung. The wholesale revamp of the South Korean economy continued throughout the early 2000s. But a major silver lining was that South Korean conglomerates, including family-run power houses known as chaebols, were forced

to reform, inject new management practices, and most importantly, compete head-on in global markets. The net result has been exponential growth for firms like Samsung, LG, SK, and Hyundai Motors since the 2000s and the rise of new high-tech start-up giants such as Naver and Kakao. Sadly, similar whole-of-government efforts to reform the national security sphere—akin to the 9/11 Commission in the United States after the September 11, 2001, al-Qaeda attacks—has eluded every South Korean government going back to the first North Korean nuclear test in 2006.

The Primacy of Economic and Technology-Focused Intelligence

However, South Korea cannot afford to wait for a major crisis. The outbreak of the war in Ukraine in February 2022 should have been a wake-up call. Nearly ten months into the grueling war, Ukrainian President Volodymyr Zelenskyy remains undaunted. Although Ukraine continues to receive crucial military assistance from the United States and other NATO members, no foreign force is waging war on Ukraine's behalf. There is very little, if any, correlation between Russian President Vladimir Putin's warmongering and what Chinese President Xi Jinping may attempt in Taiwan. But as Xi begins an unprecedented third term as general secretary of the Chinese Communist Party (CCP) and the most powerful Chinese leader since Mao Zedong, it may be difficult for China's leaders to control ultranationalists in the party and the armed forces amid calls to finally unify the motherland, so to speak, under Xi's watch.

In more ways than one, South Korea has faced a department store of security threats. So far, none have triggered a new war or a massive economic crisis. But the best time to prepare for the coming vortex is when South Korea has the wherewithal to enact critical reforms that will mitigate and minimize potential fallout. Only time will tell if Seoul manages to do so. But prolonging a business-as-usual approach in the national security field is going to entail significant opportunity costs. If the progressive political opposition to Yoon's government continues to pin hopes on thawed relations with North Korea and its leader Kim Jong Un, if the conservatives keep emphasizing the importance of a strong U.S.-ROK alliance, and if the South Korean military continues to highlight the importance of high-tech weapons, vital national security reforms including revamping the South Korean intelligence community will not happen.

The importance of economic security cannot be overemphasized. Yet there is no overarching mechanism within the South Korean government that oversees and coordinates foreign economic and technology intelligence. The National Intelligence Service (NIS), Ministry of Economy and Finance, Ministry of Science and ICT, and Ministry of Foreign Affairs each undertakes economic intelligence collection and assessments. But in an era in which the private sector, including start-ups, remains far ahead of government agencies, assessing foreign economic and technology trends must include corporations and nongovernment entities.

Preparing for Hybrid Conflicts

South Korea has several first-rate, government-sponsored, economics think tanks such as the Korea Development Institute, the Korea Institute for Industrial Economics and Trade, and the Korea Institute for International Economic Policy. In the technology sectors, the Daedeok Science Park in Daejeon, for example, houses most of the government-run technology R&D centers, including the Korea Institute of Science and Technology, Electronics and Telecommunications Research Institute, and the Korea Atomic Energy Research Institute. Yet efforts to maximize horizontal and vertical information flows and exchanges remain limited. Most importantly, a dedicated national hub in the Office of the President must be created to coordinate foreign economic and technological intelligence. Relatedly, the ROK must significantly enhance its foreign economic and technology intelligence within the NIS and the broader intelligence community.

The ROK government should undertake a whole-of-government national security review and enact key structural reforms. Like the United States and Australia, South Korea should seriously consider forming its own version of the office of the director of national intelligence. For a country so dependent on the global economy, South Korea must put economic and technological intelligence at the heart of its national security operations. The government must create new mechanisms to cooperate extensively with the private sector and foster unparalleled, horizontal cooperation between key governmental economic and technology institutes. In short, the ROK must rethink national security and prepare for unprecedented economic and technology competition. Of course, South Korea cannot ignore North Korea's nuclear tipping point, and neither can it afford to sit on the sidelines if China attacks Taiwan. There is no blueprint or field manual that lays out the contours of intensifying hybrid conflicts. But accentuating the primacy of AI to the future of warfare and transforming the country's armed forces into a "smart military" are, at best, cosmetic measures. As General Douglas MacArthur said,

The history of failure in war can almost always be summed up in two words: "Too late." Too late in comprehending the deadly purpose of a potential enemy. Too late in realizing the mortal danger. Too late in preparedness. Too late in uniting all possible forces for resistance.⁵

If South Korea wants to mitigate the fallout from inevitable crises and better prepare for hybrid warfare, MacArthur's warnings should be taken to heart more than at any other time since the beginning of the Korean War.

Polarized Politics and Public Perceptions on National Security

Fractured politics is hardly unique to South Korean democracy. But the depth of political enmity between the country's political left and the right has significantly eroded the possibility of any meaningful bipartisan compromise. When the conservative People Power Party won the presidency in March 2022 by an extremely slim margin of under 1 percent,⁶ the progressive Democratic Party was shell-shocked. In June 2022, a month after Yoon was inaugurated, the now ruling People Power Party won a resounding victory in crucial local elections including mayoral races in Seoul and Busan. However, while the conservative party gained key political ground by winning the presidency and local elections, the first six months of the Yoon administration have been a rocky ride. Unless Yoon fundamentally resets his political agenda, there is little guarantee that voters will give the conservatives a working majority in the National Assembly. Until April 2024 or the next general election, the opposition Democratic Party continues to hold a majority with 170 seats in the 300-seat legislature.⁷

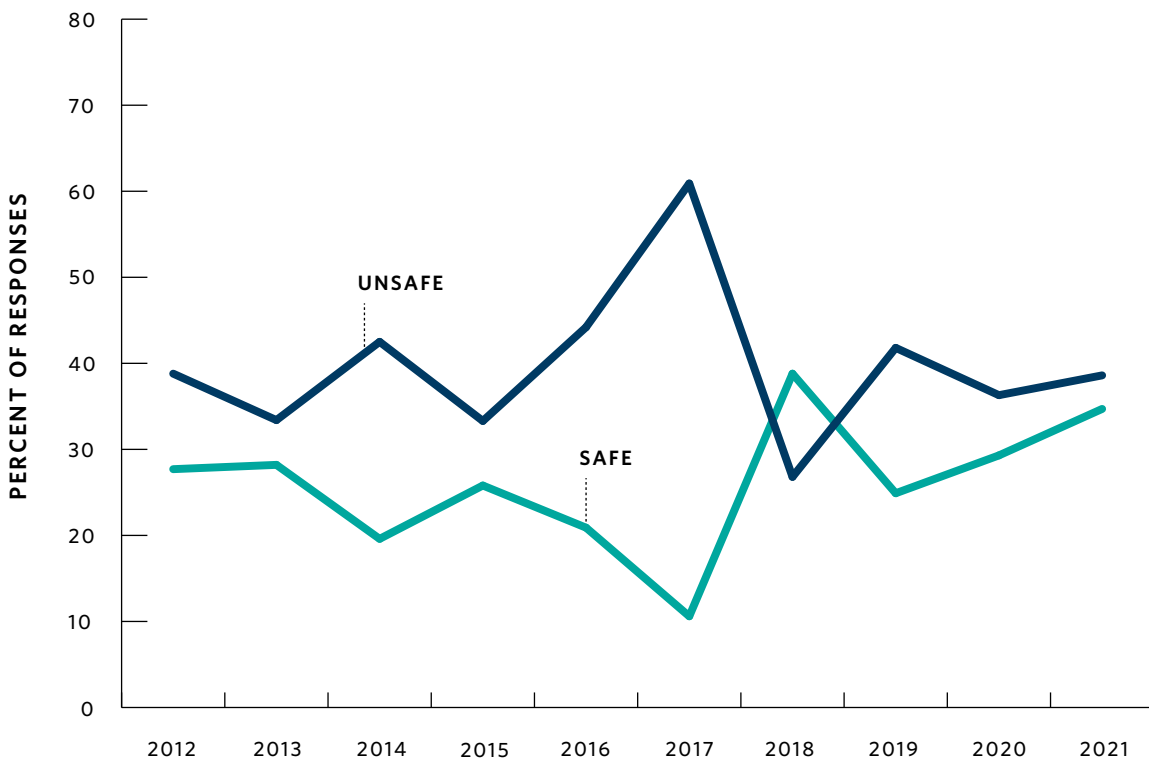
The current head of the Democratic Party, Lee Jae-myung, lost to Yoon in the March 2022 presidential race and is consumed with achieving two overriding objectives: deflecting multiple investigations begun by the Supreme Prosecutor's Office, which began when former president Moon Jae-in was in office, and incessantly attacking Yoon to bolster the opposition's chances in the April 2024 National Assembly election. Lee is also betting that if he can somehow stave off criminal investigations and his party continues to retain a majority after 2024 (though this is hardly guaranteed), he has a good shot at rewinning the party's nomination for president going into the March 2027 presidential election. Hence, while Lee and the Democratic Party pay lip service to strengthening defense and national security, as long as he remains as party leader, prospects of any meaningful bipartisan consensus on defense are likely to be severely limited.

As expected, Lee has refused to support the government's efforts to strengthen U.S.–South Korea–Japan trilateral security and defense cooperation amid worsening North Korean provocations. On October 7, 2022, when U.S., South Korean, and Japanese naval vessels participated in a joint antisubmarine exercise, Lee denounced the exercises as “extreme pro-Japanese” actions meant to inflame anti-Japanese sentiments to score political points.⁸ For the Democratic Party, castigating Yoon for upgrading trilateral military exercises entails significant political costs, especially when North Korea's nuclear and ballistic missile capabilities are maturing. If Lee thinks he can push Yoon into a political corner by attacking trilateral exercises, it will be yet another example of how far the Democratic Party has shifted its thinking about South Korea's national security posture, displaying a persistent attachment to peace overtures to Pyongyang while downplaying North Korea's growing nuclear and ballistic missile threats.

How South Koreans Perceive National Security and the Military

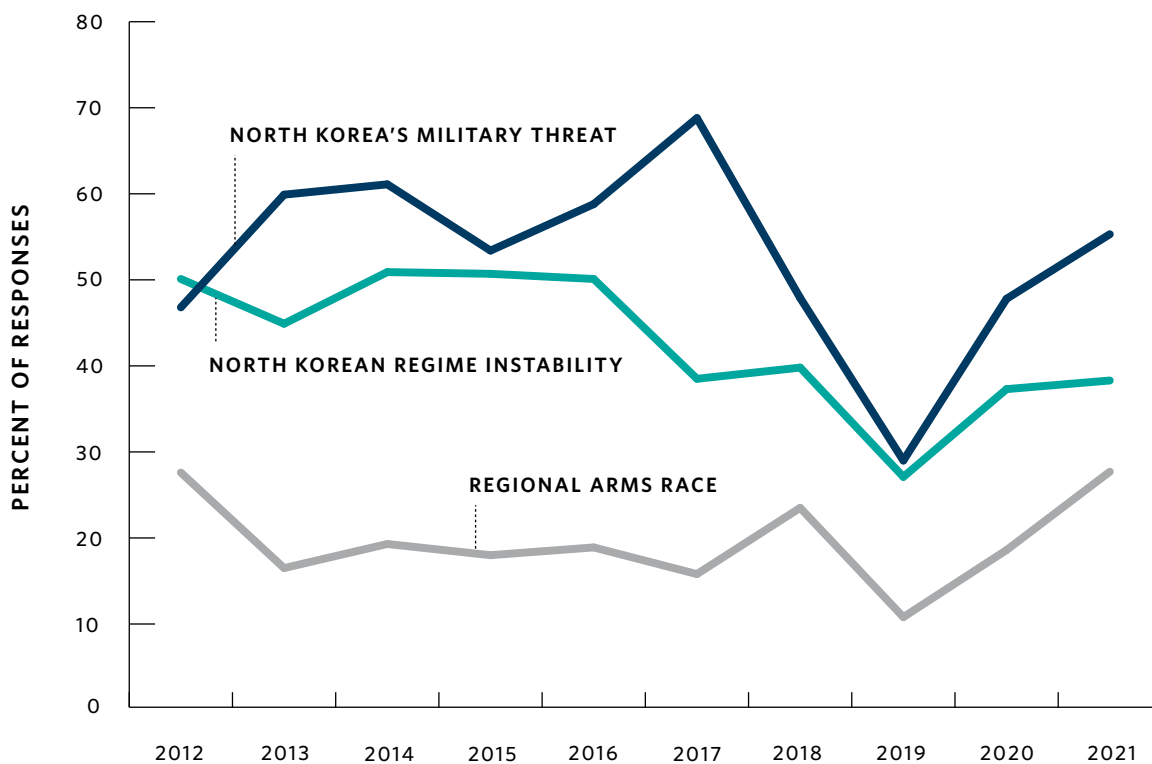
For the most part, South Koreans' views of North Korea have remained fairly objective. At the height of Moon's and former U.S. president Donald Trump's engagement with Kim and North Korea in 2018 and 2019, the South Korean public welcomed potential breakthroughs in inter-Korean and U.S.–North Korea ties. But by the same token, they did not expect, as Moon and Trump did, a fundamental resetting of these relationships. In the March 2022 Korea National Defense University (KNDU) poll noted below, the South Korean public's perception of the prevailing security environment reflected tangible changes in South-North relations. Concerns rose sharply when North Korea threatened “fire and fury” with the United States in 2017. In 2016, a relatively high percentage (44.2 percent) responded that South Korea's security situation was “unsafe,” while only 20.9 percent said that it was “safe.” Just a year later in 2017, however, a peak of 60.9 percent said the situation was “unsafe.” But from 2018 to 2021, their security perceptions returned to more normal bandwidths, as illustrated in figure 2.

Figure 2. South Korean Public Perceptions of Their Security Situation



Source: “Perception on National Security Affairs, 2021,” Research Institute for National Security Affairs, Korea National Defense University, February 2, 2022, 5, <https://www.kndu.ac.kr/rinsa/bbs/data/view.do>.

Figure 3. External Factors and South Korea's Security Threats



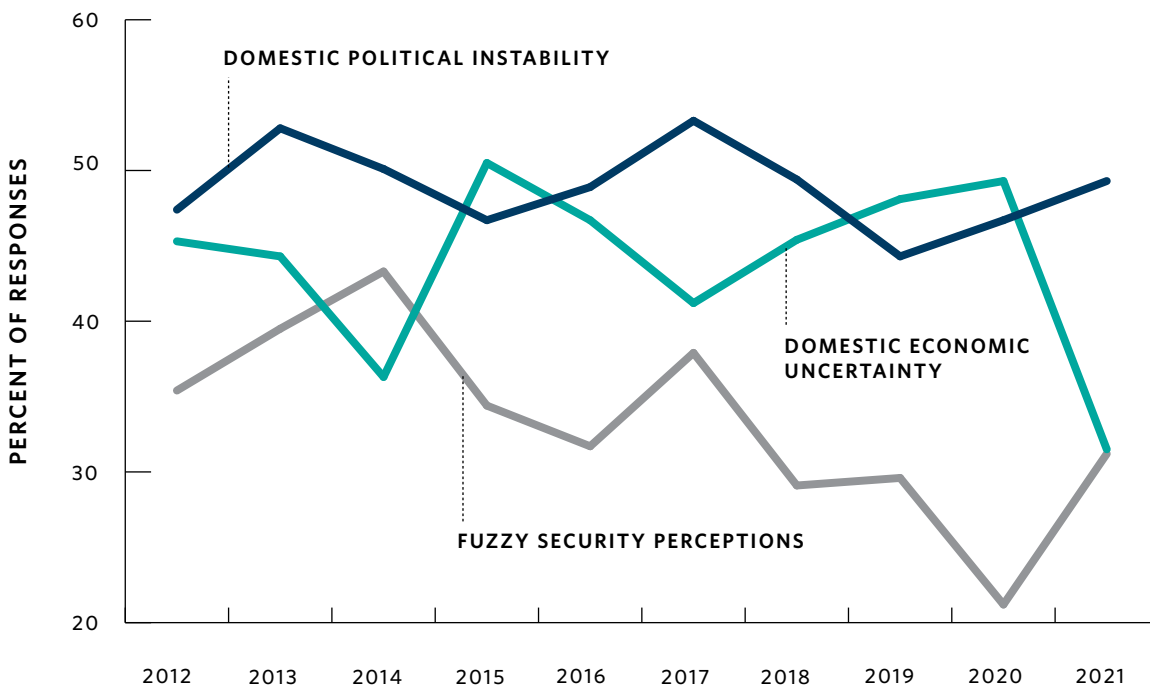
Source: "Perception on National Security Affairs, 2021," Research Institute for National Security Affairs, Korea National Defense University, February 2, 2022, 6, <https://www.kndu.ac.kr/rinsa/bbs/data/view.do>.

As shown in figure 3 below, perceptions of North Korea as a military threat dropped from a height of 68.8 percent in 2017 to 29 percent in 2019. In 2018, Moon held three summits with Kim, and Trump met with Kim for the first-ever U.S.–North Korea summit in Singapore in June 2018. But after the second Trump-Kim summit cratered in Hanoi in February 2019, the public's concern over North Korea's military threat jumped back to more normal levels of 40 to 50 percent.

Other than external factors, when South Koreans were asked which domestic factors could be seen as national security threats (see figure 4), an overwhelming 49.3 percent answered "domestic political instability" followed by "economic insecurity" (31.5 percent) and "fuzzy security perceptions" (31.2 percent).⁹

The fact that 50 percent of South Koreans felt that domestic political instability should be construed as a national security threat speaks volumes about how negatively the public views domestic politics. To put this into context, just slightly more (55 percent) said that North Korea's military was the most important national security threat. Interestingly, South Koreans also lacked a lot of confidence in their military though, importantly, they also felt that defense spending should be increased to better meet an expanding array of defense and

Figure 4. Domestic Factors and South Korea's National Security Threats



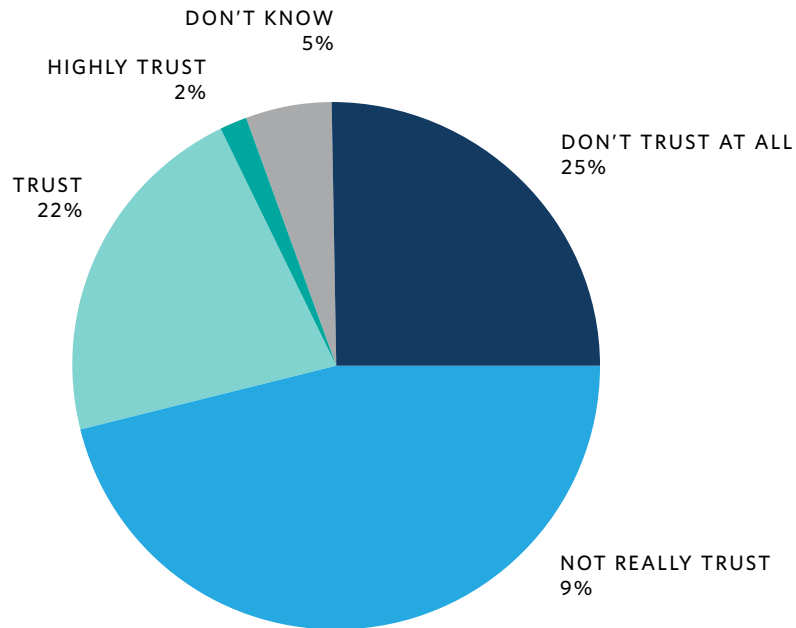
Source: "Perception on National Security Affairs, 2021," Research Institute for National Security Affairs, Korea National Defense University, February 2, 2022, 5, <https://www.kndu.ac.kr/rinsa/bbs/data/view.do>.

security threats. In the 2021 KNDU poll, 40.8 percent responded that South Korea's defense budget should be increased (including the 6.9 percent who supported a major increase), a 10 percent jump compared to the 2020 poll. A total of 51.7 percent of experts answered that South Korea's defense budget should be increased, including the 13.3 percent who said that the ROK needed to significantly increase defense outlays.¹⁰ (The government requested a 4.6 percent increase in defense spending for 2023, some \$42 billion, although the exact dollar amount is likely to shift due to changing exchange rates).¹¹

When asked whether or not respondents trusted what the Ministry of National Defense reported or announced, around 71 percent answered that they did not (see figures 5 and 6). Interestingly, the same question posed to sixty experts yielded a higher level of trust: 55 percent said they trusted what the ministry said to some degree.¹²

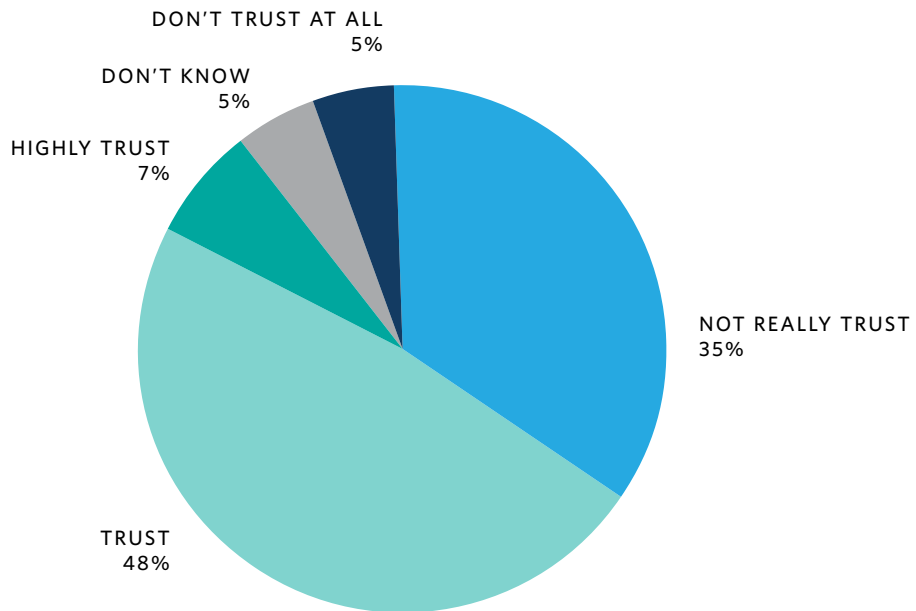
As to why they didn't trust what the Ministry of National Defense reported, 76.6 percent of the public and 79.2 percent of experts answered that it was because of a "lack of transparency." As an example, on October 4, 2022, the ROK military on the country's eastern coast fired a Hyunmoo-2C ballistic missile in response to a string of North Korean ballistic

Figure 5. Public Trust in the Ministry of National Defense



Source: "Perception on National Security Affairs, 2021," Research Institute for National Security Affairs, Korea National Defense University, February 2, 2022, 151, <https://www.kndu.ac.kr/rinsa/bbs/data/view.do>.

Figure 6. Experts' Trust in the Ministry of National Defense



Source: "Perception on National Security Affairs, 2021," Research Institute for National Security Affairs, Korea National Defense University, February 2, 2022, 151, <https://www.kndu.ac.kr/rinsa/bbs/data/view.do>.

missile tests, but the missile misfired and crashed in a nearby golf course. According to press reports, it took the military eight hours to announce the failed missile test. In a prescheduled annual National Assembly oversight hearing, General Kim Seung-gyeom, the chairman of the Joint Chiefs of Staff, told the defense committee that he was “deeply sorry” for the military’s delayed announcement of the failed missile test.¹³ In the same survey, only 35.1 percent of respondents said that they “trusted” the military, a significant drop from a rate of 64.7 percent noted in a 2020 survey.

One possible explanation for such a dip is the ongoing fallout from North Korea’s brutal killing of a South Korean Ministry of Fisheries and Maritime Affairs official on September 21, 2020. At that time, the Moon administration asserted that Lee Dae-joon, who was on sea duty near Yeonpyeong Island in the Western Sea (Yellow Sea), allegedly tried to defect. Lee was killed by North Korean soldiers, and his body was burnt at sea. In October 2022, the Board of Audit and Inspection requested the investigation of some twenty persons, including former high-level national security–related officials in the Moon government. According to the board, government agencies pushed the story that Lee was a defector although there was insufficient evidence.¹⁴ Former minister of defense Suh Wook and Coast Guard Commissioner General Kim Hong-hee were arrested in October 2022 for their alleged covering up of facts and distorting circumstances. The final verdict will rest on a prolonged trial that is most likely to reach the supreme court.¹⁵

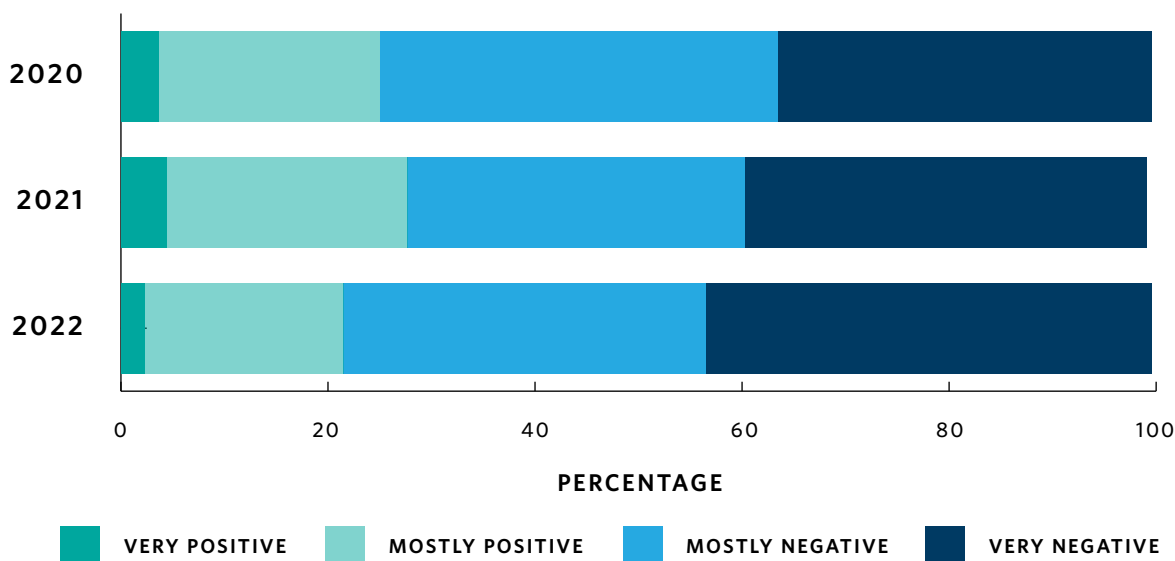
When the Yoon administration came into office in May 2022, it ordered a wholesale review of the case. In June 2022 after seemingly contradictory evidence was uncovered, the maritime police apologized for its initial October 2020 finding that the victim Lee had tried to defect. The Board of Audit and Inspection is continuing to examine this case to ascertain if Moon administration officials in the president’s office pressured the maritime police and the Ministry of National Defense into arguing that Lee was unfortunately killed as he was trying to defect. With the exception of when his presidency was about to end in May 2022, Moon and his senior staff referred to North Korean missile launches as unconfirmed projectiles.¹⁶ In January 2022 when North Korea fired a Mach 5 hypersonic missile, the Moon government called a National Security Council meeting and said that it was “carefully observing recent development in North Korea” and said that it had “deep regret” over the North Korean test.¹⁷ At the same time, however, Moon officials stressed the “importance of restarting dialogue with North Korea.”¹⁸

While the South Korean public supports a robust national defense posture, they are also mistrustful of a military that has gone out of its way to support the Moon government’s kowtowing approach to North Korea. What the public wants from its military is both political neutrality and at the same time, armed forces that are unafraid of emphasizing critical defense needs and determined to fully defend the territorial and political integrity of the ROK.

Coping with the North Korean Enigma

If entrenched partisan politics is a key impediment to genuine national security reforms, another major factor is the deep ideological divide on South Korea's strategy toward the North. One of the most divisive (and, in many respects, corrosive) spillovers of South Korean democracy has been diametrical shifts in North Korea policy. Since 1987, South Korea has had conservative presidents—Roh Tae-woo (1988–1993), Kim Young-sam (1993–1998), Lee Myung-bak (2008–2013), Park Geun-hye (2013–2017), and Yoon Suk Yeol (2022– present)—and progressive presidents, including Kim Dae-jung (1998–2003), Roh Mu-hyun (2008–2013), and Moon Jae-in (2017–2022). Engagement with the North is no longer taboo. Four inter-Korean summits, beginning with Kim Dae-jung's meeting with then North Korean leader Kim Jong Il in Pyongyang in 2000, have educated South Koreans on the highs and lows of summitry. Moon initially captivated the South Korean public with his three summits with Kim Jong Un in 2018. However, Pyongyang's refusal to begin denuclearization talks in earnest, Moon's pleas for dialogue, and the failure of Trump's summits with Kim in Singapore in June 2018 and in Hanoi in February 2019 dampened hopes for a fundamental breakthrough (see figure 7).

Figure 7. South Korean Attitudes Toward the North Korean Regime



Source: "2022 National Unification Perception Survey," KBS Public Media Institute, August 11, 2022, 3, <https://news.kbs.co.kr/data-file/2022/08/12/301081660304404385.pdf>.

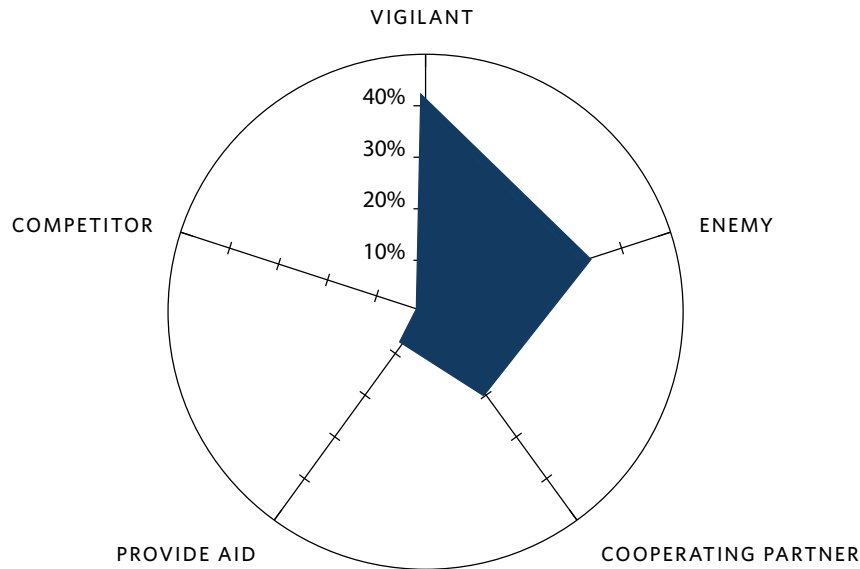
When Moon was in office, he heralded a new era in South-North relations, as in July 2019 when he said that “not only South and North Korea but also North Korea and the [United States] have declared the end of their hostile relationship and the true beginning of a new era of peace, not through signatures on a document but through action.”¹⁹ Moon also constantly stressed not only that Kim had vowed to denuclearize but also that military tensions would be reduced irreversibly with Seoul and Pyongyang’s signing of the September 19, 2018, South-North Military Comprehensive Military Agreement (officially titled the Agreement on the Implementation of the Historic Panmunjom Declaration in the Military Domain). As illustrated in figure 7, even in 2020 when support for Moon’s North Korea policy was at its height, only 3.6 percent of respondents said that South-North ties were “very positive,” while 38.4 percent said “mostly negative” and 36.2 percent answered that relations were “very negative.” After the Yoon government came into power, more than three-quarters of participants responded that inter-Korean ties were “mostly or very negative.”

The same August 2022 poll by the Korean Broadcasting Service (KBS) showed that 40 percent of respondents felt that North Korea is a country that one should be “vigilant” about, and 32.7 percent responded that North Korea was an “enemy state.” Only 18.9 percent of respondents felt that North Korea should be seen as a “cooperative partner,” while 6.9 percent saw North Korea as a country that should be given aid. Interestingly, only 1.1 percent of South Koreans in the survey said that North Korea should be seen as a “competitor”—an affirmation across numerous surveys that highlights the perhaps irreversible economic and development gap between the two Koreas. At the same time, however, and despite the fact that multiple South-North summits since 2000 have not resulted in a fundamental resetting of South-North relations, much less substantive progress in denuclearization, 72 percent those polled by KBS in August 2022 answered that inter-Korean summits “must be held” or “some need to be held,” while 18.7 percent responded that such meetings were “not necessary” or “shouldn’t be held at all.”²⁰

Hardening South Korean Views Toward the North

As seen in figure 8, 53.1 percent of respondents remarked in 2021 (the last full year Moon was in office) that they were “mostly against” or “strongly against” his North Korea policy. This was a major rebuke of Moon’s legacy since he devoted so much of his time in office to emphasizing self-described breakthroughs in South-North relations and heavily politicizing intelligence assessments of North Korea. But by the same token, Yoon has only been in office since May 2022 (only two months before the survey was conducted on July 8–12, 2022), yet nearly 56 percent of respondents said they were “mostly against” or “strongly against” Yoon’s North Korea policy. These traits reflect the built-in ambiguity and structural inconsistencies of how most South Koreans see North Korea, and these findings also may have been affected by generational differences and ideological preferences.

Figure 8. Attitude on South-North Relations (2022)



Source: "2022 National Unification Perception Survey," KBS Public Media Institute, August 11, 2022, 4, <https://ipus.snu.ac.kr/blog/archives/research/6084>.

Table 1. Political Preferences and Attitudes on South-North Relations (2021)

	Aid Recipient	Cooperative Partner	Competitor	Be Vigilant	Adversary
Progressive	9.80%	57.80%	6.80%	18.20%	7.40%
Centrist	10.50%	52.30%	5.70%	22.20%	9.30%
Conservative	12.50%	52.30%	5.70%	27.20%	18.00%

Source: Seoul National University, "Survey on Unification Attitudes 2021," Institute for Peace and Unification Studies, 2022, 79, <https://ipus.snu.ac.kr/blog/archives/research/6084>.

Table 2. Perceptions of Possible North Korean Provocations by Age Group (2015-2021)

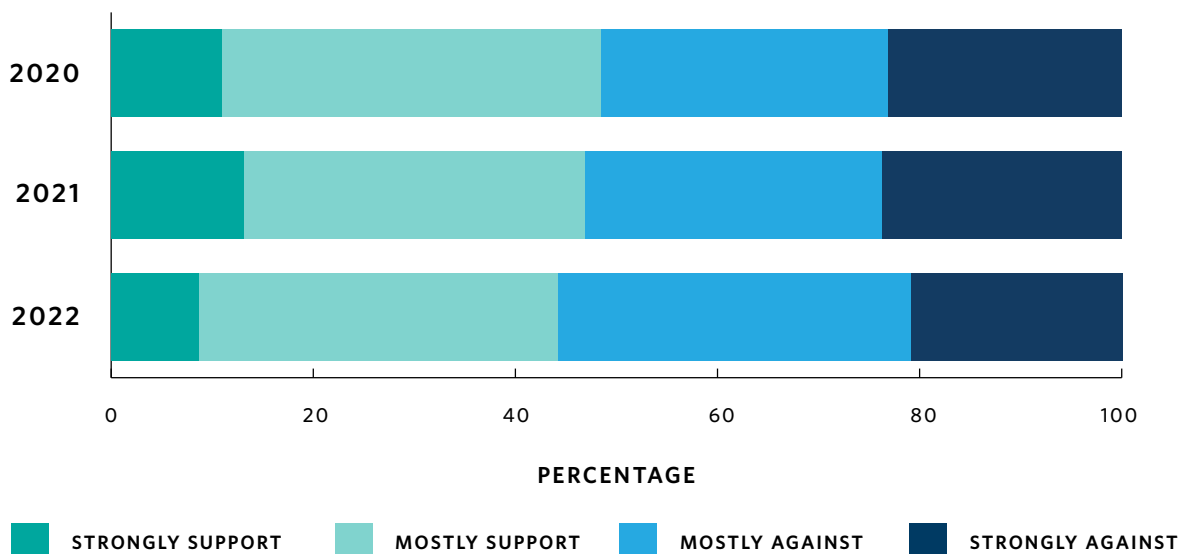
	2015	2016	2017	2018	2019	2020	2021
20s	74.50%	66.90%	77.90%	57.60%	60.20%	64.90%	60.40%
30s	71.00%	69.80%	72.70%	58.80%	62.00%	66.20%	57.20%
40s	70.00%	63.10%	71.30%	53.10%	57.10%	54.10%	54.00%
50s	68.40%	65.70%	66.30%	53.40%	57.30%	57.70%	55.80%
60s	68.80%	65.90%	65.30%	58.10%	54.10%	63.90%	54.60%

Source: Seoul National University, "Survey on Unification Attitudes 2021," Institute for Peace and Unification Studies, 2022, 79, <https://ipus.snu.ac.kr/blog/archives/research/6084>.

Seoul National University’s Institute for Peace and Unification Studies publishes an annual survey on public attitudes toward unification, and the most recent survey (2021) was uploaded in March 2022. The 2021 survey reflected the enduring inconsistencies of South Korean attitudes toward North Korea and South-North relations. For example, nearly 58 percent of progressives saw North Korea as a “cooperative partner,” while only 7.4 percent believed North Korea to be an enemy or an adversary. Unsurprisingly, 45.2 percent of those who considered themselves to be conservative regarded North Korea an “adversary” or a country with which one had to be “vigilant.” Interestingly, however, nearly 35 percent of conservatives felt that North Korea should be seen as a “cooperative partner,” while 25.6 percent of progressives felt that one should be “vigilant” about North Korea or even considered Pyongyang an adversary (see table 1).

The same survey also highlighted key generational differences. Although those in their twenties were more likely to have more progressive views on a range of social issues, only 37.6 percent of this subset of respondents saw North Korea as a “cooperative partner,” a much lower share than those in their thirties (50.3 percent), forties (52.4 percent), and fifties (55.2 percent).²¹ Even more interestingly, on questions that traced how South Koreans perceived the possibility of North Korean provocations from 2015 to 2021, those in their twenties had the highest average score (66 percent) out of all age groups (see table 2). In part, such a result is not a huge surprise since draft-eligible men are mostly in their twenties and are likely to be more sensitive to potential shifts in North Korean behavior including provocations such as missile tests.

Figure 9. Approval and Disapproval of Current Government’s North Korea Policy



Source: “2022 National Unification Perception Survey,” KBS Public Media Institute, August 11, 2022, p. 9.

Note: Responses for the years 2020 and 2021 were under Moon Jae-in’s government, and responses for the year 2022 were the first few months of Yoon Suk Yeol’s government.

It is far too early to forecast just how South-North relations are likely to evolve during the remaining four and a half years of Yoon's term, which will end in May 2027. While Kim met with Moon three times in 2018 at the height of the Moon administration's bid for an inter-Korean détente, he did so largely as a way of reaching out to Trump. When the second U.S.–North Korea summit collapsed in Hanoi in February 2019, Pyongyang subsequently lashed out at Moon for standing in the way of U.S.–North Korea talks. Even though Moon continued to send one-way messages to Kim to rekindle South-North talks until the very end of his term, Kim had no interest in engaging with Moon. Indeed, from January to November 2022, North Korea conducted more than twenty ballistic and cruise missile tests, the highest number on record.²² North Korea launched two short-range ballistic missiles right after U.S. Vice President Kamala Harris visited Seoul in September 2022 and as the United States, South Korea, and Japan conducted antisubmarine exercises for the first time in five years.²³ Although the Yoon administration has confirmed, for now, that it will uphold all of the inter-Korean agreements signed by the previous government and said it looks forward to restarting South-North talks, Kim is not likely to respond favorably. Indeed, that same month Pyongyang made an explicit announcement of its nuclear doctrine, including the conditions in which it would use nuclear weapons, such as when its leadership or strategic assets were on the verge of being attacked or actively under attack.²⁴

Despite a range of views on how best to cope with North Korea, most South Koreans do not believe that North Korea will ever give up its nuclear weapons. In the 2021 survey released by the KNDU in February 2022, when asked “do you believe North Korea has the intention of completely giving up nuclear weapons?,” 70.6 percent answered “no.”²⁵ To be more specific, 28.2 percent answered “no” and 42.4 percent said “absolutely not,” while only 2.8 percent answered “absolutely,” 9.4 percent replied “yes,” and 17.3 percent said “fifty-fifty.”²⁶ Interestingly, those who answered that North Korea was not likely to denuclearize rose by 16 percent from 2020. Compared with other surveys, including the ones noted above, the 2021 KNDU annual survey also reflected negative views on North Korea. When asked whether they considered North Korea “an adversary that threatens the ROK's security,” 61.3 percent replied in the affirmative, while 22.1 percent answered that North Korea was a “cooperative partner.”

The ROK's Expanding Threat Landscape

One of the defining characteristics of inter-Korean relations is that while the range of military threats from Pyongyang has worsened since the 2000s, South Korean policy toward North Korea has fluctuated widely depending on whether the right or the left wins the presidency. Among major U.S. allies in the Indo-Pacific, South Korea experiences changes in

government that result in significant policy swings over North Korea, ties with the United States and China, and attitudes toward businesses. In Australia and Japan, for example, changes in prime ministers rarely have resulted in major foreign policy shifts.

In Japan, structural continuity has been embodied by the Liberal Democratic Party, which has been in power since 1955 (except the periods 1993–1996 and 2009–2012). This is particularly the case with Japan’s attitudes toward North Korea. In early October 2022, North Korea test-fired a ballistic missile that crossed Japanese airspace for the first time since 2017. While Tokyo did not take steps to shoot down the missile, Japanese Minister of Defense Yasukazu Hamada said Japan would not “rule out any options including counterattack” measures.²⁷ Results from a September 2021 EAI-Genron poll showed that 72.8 percent of Japanese respondents felt that North Korea was the biggest military threat, followed by China with 72.1 percent and Russia with 62.2 percent.²⁸

A more urgent issue, however, is that the ROK’s national security apparatus, intelligence flows and coordination, counterintelligence mechanisms, and efforts to set a new national security strategy are not designed to effectively manage the multiple security vortexes the country faces. A combination of reasons has led to successive governments’ inability to implement structural national security reforms. Foremost among them are deeply divergent views between the left and the right on how best to cope with the North Korean threat. Entrenched bureaucratic interests and inertia led by the Ministry of National Defense and the three services have stymied structural defense reforms. Since presidential terms are limited to a single five-year term interspersed with local and National Assembly elections, presidential authority begins to wane considerably after an incumbent’s third year in office. And given the primacy of getting reelected, members of the National Assembly rarely spend political capital on undertaking bipartisan national security, intelligence, and defense reforms unless they have a direct bearing on their constituencies. The end result has been years of political criticisms of a particular government’s national security policy without calling for, or more importantly, supporting bipartisan national security reviews. The opposition Democratic Party has rarely strongly condemned North Korea’s string of military provocations, such as the 2010 sinking of a Korean naval vessel that resulted in the death of more than forty ROK Navy sailors. Nevertheless, it remains unlikely that the National Assembly and Korea’s major political parties will adopt necessary bipartisan national security reforms. If such a trend continues, however, South Korea will pay a higher price down the road, given the National Assembly’s unwillingness to push for bipartisan national security reforms.

Four Chief Security Concerns

As noted previously, the ROK faces four major threats: (1) North Korea’s growing nuclear arsenal and increasingly sophisticated ballistic missile program, (2) expanding geopolitical threats triggered by China’s contestation of U.S. military supremacy in the Western Pacific, (3) U.S.-China economic decoupling in conjunction with the South Korean economy’s

overdependence on the Chinese market and the need for more resilient and reliable global supply chains, and (4) growing uncertainty driven by worsening global technology competition as well as greater rivalry between allies and partners, all while AI and other crucial technologies of the Fourth Industrial Revolution become more prevalent. Moreover, just when South Korea, like other advanced economies, faces anemic economic growth, the country's rapidly expanding social welfare costs are going to become increasingly problematic as its tax base decreases owing to its status as the world's fastest-aging society and the country with the lowest fertility rate in the Organization for Economic Cooperation and Development.²⁹ All of these issues are coming to a head as domestic politics is more deeply divided than at any other time since the restoration of democracy in 1987.

To be sure, South Korea has consistently faced a long menu of security and economic threats. For a country that relies totally on foreign oil and natural gas imports (as Japan does), even small perturbations in global energy markets trigger major ripples in the South Korean economy. The oil embargo by OPEC in the early 1970s, the outbreak of the 1997 Asian financial crisis, and the 2008 global financial crisis significantly impacted South Korea's economic well-being. What is different in the 2020s, however, is the sheer scale and rapid convergence of noteworthy military, economic, and technological threats. In 2021, South Korea's trade dependency index (its total trade volume as a portion of GDP) came to 63.5 percent, a slight drop from 2020 but still a remarkably high figure. By contrast, U.S. dependence on foreign trade was 19.3 percent and Japan's was 28.1 percent.³⁰ In 2020, 24.7 percent (\$131 billion) of South Korean exports were destined for China, and if one includes Hong Kong with 5.83 percent (\$30 billion), the number jumps to 30.52 percent (\$161 billion) according to OECD data.³¹ Moreover, almost all of South Korea's core exports—integrated circuits, cars, cargo ships, and electric batteries—are heavily dependent on global supply chains.

A Looming Taiwan Crisis

The expanding range of threats that South Korea faces is not limited to more tangible or measurable hazards. Equally significant are intangible variables such as political cohesion, the country's prevailing national security consensus, the military's fighting ethos, and the future of the U.S.-ROK alliance. The South Korean public understands the importance of maintaining a robust defense posture as evinced by recent surveys and the growing realization that North Korea is highly unlikely to give up its nuclear arsenal.

One worrisome consideration is what steps, if any, the ROK should take in case of out-of-area contingencies such as a possible Chinese invasion or naval blockade of Taiwan. Indeed, Taiwan is one of the many plausible hot spots where a crisis would have almost existential implications for South Korean security and wide-ranging implications for the U.S.-ROK military alliance. Short of North Korean missile attacks against South Korea and the

outbreak of a second Korean War, Chinese military operations against Taiwan and how the ROK would opt to respond are among the most consequential potential developments in a highly fluid regional security environment.

While South Korea is very aware of the growing military threats posed by North Korea and China, whether the public and even the government would provide military assistance in a Taiwan contingency remains doubtful. In the 2021 KNDU poll, when asked whether the ROK should dispatch forces even in “dangerous zones,” 35.8 percent answered that they should only be sent to “safe zones.” Only 28.7 percent answered that in order to assist in the safeguarding of international security, the ROK should send forces to danger zones. A clear majority of experts (65 percent), however, answered in the affirmative.³² Indeed, one of the enduring hallmarks of South Korea’s security perceptions is the overwhelming primacy of coping with the North Korean threat at the cost of pushing aside other significant security threats. Although it is beyond the scope of this report to delve into likely South Korean responses, if China were to invade Taiwan or implement a naval blockade, it is very difficult to imagine how the ROK could avoid (1) helping counter a naval blockade of Taiwan and seeking to safeguard the freedom of navigation that is vital to South Korea’s economic survival; (2) providing military and logistical assistance to U.S. Forces Korea (USFK) for Taiwan-specific contingencies, especially if elements of the USFK (including the Seventh U.S. Air Force based at Osan Air Base in South Korea) are deployed to Taiwan; (3) defending ROK forces and the USFK in case China opts to undertake offensive military operations; and (4) coordinating intelligence, surveillance, and reconnaissance (ISR); missile defense; and contingency operational planning with USFK, U.S. Forces Japan, and the Japanese Self-Defense Forces.

While actual Chinese operations will be situation-specific, if U.S. and Chinese forces collide in Taiwan, it is not improbable to imagine that U.S. military bases in South Korea could become targets for the PLA. In addition, China could undertake preemptive military actions against the USFK or ROK forces to deter, deny, or diminish U.S. reinforcements to Taiwan.³³ Some analysts have argued that South Korea should continue to pursue hedging by providing indirect military support to the United States, saying that “the strategy of indirect support is clearer than ‘strategic ambiguity,’ and more prudent than ‘strategic clarity.’”³⁴ Nevertheless, although such theoretical circuit-breakers may be preferable, it would be extremely difficult for the ROK to offer only remedial or indirect military support in the event of actual U.S.-China military conflict in a Taiwan contingency.

South Korea’s Hardening Views on China

Aside from the topic of North Korea, an overwhelming majority of South Koreans believe that China is one of the country’s top national security threats. In the 2021 KNDU poll, 81.3 percent of respondents said that “China’s growing military power will have a negative

impact on our security.” Unsurprisingly, 92.9 percent of those surveyed said that the United States was the most important country for South Korean security, while 71.5 percent also cited the United States as the most important country for South Korea’s economy. Given the reintroduction of U.S.-ROK-Japan trilateral military exercises under the Yoon government, 63 percent replied that trilateral security cooperation was necessary.³⁵

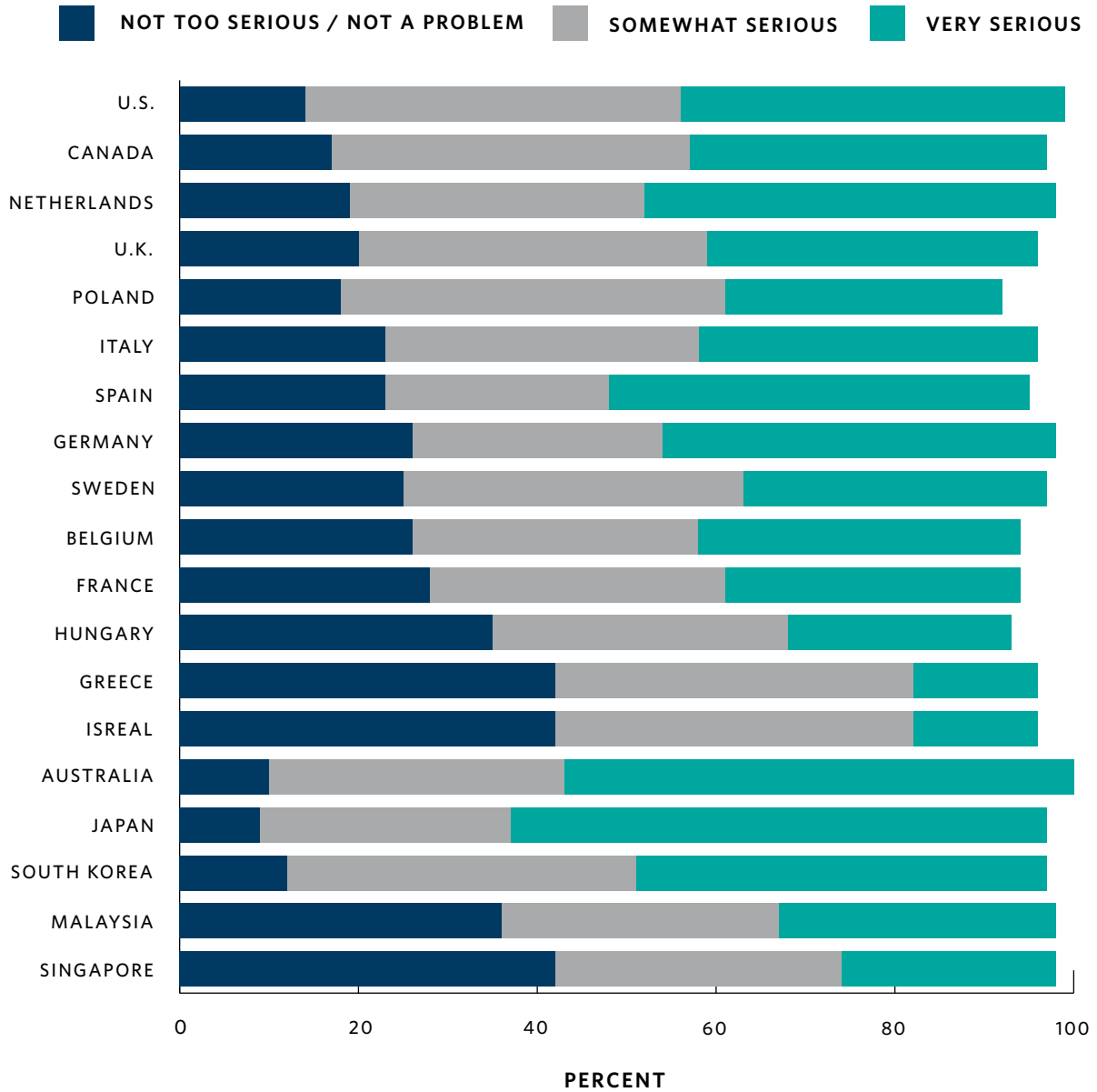
In a Pew Research Center poll released in June 2021, 77 percent of South Koreans had a negative view of China—only behind Australia (78 percent), Japan (88 percent), and Sweden (80 percent).³⁶ Almost all of the seventeen countries surveyed were advanced economies and established democracies. When asked whether the Chinese government infringes on the personal freedoms of its people, 92 percent of South Koreans answered in the affirmative—just second to Swedes with 95 percent and followed by Australians (91 percent) and Americans (90 percent).³⁷

South Korea’s negative views on China are not likely to change. In a June 2022 Pew Research Center poll of nineteen countries, South Koreans had the most positive view of the United States (89 percent) right below Poland (91 percent).³⁸ Only 19 percent of South Koreans had favorable views of China, 70 percent fewer than those who felt that way about the United States. In a September 2022 Pew survey that looked at global attitudes toward China during the rule of Chinese Communist Party General Secretary Xi Jinping, 80 percent of South Koreans had unfavorable views of China compared to only 31 percent in 2001.³⁹ Interestingly, all of the top U.S. allies in the Indo-Pacific—including Japan, South Korea, and Australia—had similar, negative views on China and Xi.

Singapore had the highest approval rating of Xi at 69 percent followed by Malaysia with 62 percent; meanwhile, among European allies, 33 percent of Greeks said that they had “some” or “a lot of confidence” in Xi—the highest mark among U.S. allies in Europe and Asia.⁴⁰ As shown in figure 10 below, even those countries that were more favorably disposed to Xi (such as Singapore and Malaysia) felt that China’s growing military power was a serious problem. A total of 62 percent of Malaysians responded that China’s military power is a problem versus 56 percent of Singaporeans. Only 9 percent of Japanese felt that rising Chinese military power was not a problem, followed by South Korea with 12 percent. Again, Australia (90 percent), Japan (88 percent), and South Korea (85 percent) all showed the highest levels of concern over rising Chinese military power.⁴¹

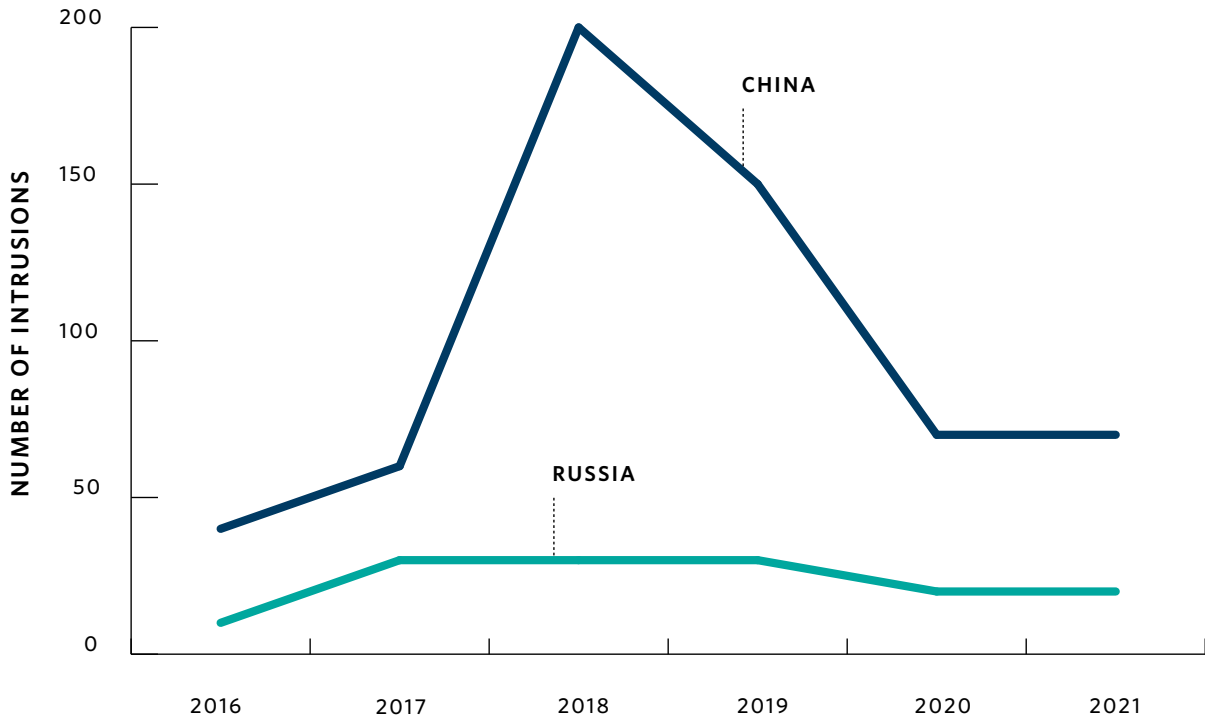
China’s aggressive military stance, including more frequent intrusions into South Korea’s air defense identification zone (KADIZ), has contributed to rising concerns of growing Chinese military power. While air defense identification zones are not binding, all aircraft must notify and receive permission from the ROK Joint Chiefs of Staff twenty-four hours prior to a flight into the KADIZ. The ROK expanded the zone in December 2013, which was soon after China had announced an expansion of its own air defense identification zone that included a South Korean–held island south of Jeju Island. Since then, the PLA (at

Figure 10. Seeing Growing Chinese Military Power as a Problem



Source: "How Global Public Opinion of China Has Shifted in the Xi Era," Pew Research Center, September 28, 2022, <https://www.pewresearch.org/global/2022/09/28/how-global-public-opinion-of-china-has-shifted-in-the-xi-era>.

Figure 11. Chinese and Russian Intrusions into KADIZ (2016–2021)



Source: Yonhap News, October 3, 2022, https://www.yna.co.kr/view/AKR20221003040151504?utm_source=pocket_mylist.

times with Russian combat aircraft and bombers) have made repeated intrusions into the KADIZ. On May 24, 2022, just two weeks after the Yoon government came into office, two PLA Air Force H-6 bombers and two Russian Tu-95 bombers and two fighters entered the KADIZ in the Eastern Sea.⁴² The South Korean Ministry of National Defense estimated that Chinese and Russian flights into the KADIZ spiked in 2018 with 200 and 30 flights respectively, a figure that dropped in 2020 and 2021 (see figure 11).⁴³

A 2022 survey by the Lowy Institute affirmed worsening relations between Australia and China. In 2009, 41 percent of Australian respondents said that China was either a very likely (15 percent) or somewhat likely (26 percent) military threat to Australia in the next twenty years. Fast forward to 2022, and 75 percent of Australians said that China was a very likely (32 percent) or somewhat likely (43 percent) military threat in the next two decades.⁴⁴ Of the many threats facing Australia, 65 percent responded that Chinese foreign policy was a “critical threat” in addition to military conflict between the United States and China concerning Taiwan (64 percent) and North Korea’s nuclear program (58 percent).⁴⁵

South Korea's negative feelings toward China are not just driven by national security and economic issues. After Seoul opted to deploy the U.S. missile defense system known as the Terminal High Altitude Area Defense (THAAD) in July 2016 following the fourth North Korean nuclear test that January, China retaliated with a partial economic boycott, curtailing market access to South Korean goods and services and preventing Chinese tourism to South Korea. The Moon administration decided in July 2017 to agree to the so-called Three No's agreement: "no additional deployment of THAAD batteries, no ROK participation in a U.S.-led regional missile defense system, and no creation of a trilateral military alliance involving the United States, South Korea, and Japan."⁴⁶ When the Yoon government came into office, Seoul stated that the THAAD issue was not subject to negotiations with China since it was the sole purview of South Korea and the United States. In August 2022, the Chinese Foreign Ministry claimed that the ROK had agreed to limit the operation of the THAAD battery in Seongju, South Korea, in addition to maintaining the Three No's agreement. According to the Yonhap News Agency, a South Korean government official said, "our government clearly states that THAAD is a self-defensive defense tool aimed at protecting our people's lives and safety from North Korea's nuclear and missile threats and a matter of security sovereignty that can never be subject to negotiation."⁴⁷

What stands out about South Korean perceptions of China is that Beijing is not just seen as a growing military and economic threat but also a place that utilizes cultural imperialism. In a study published by Stanford University's Freeman Spogli Institute for International Studies in February 2022, South Korean views of China were even more negative than feelings for Japan—a significant development given the never-ending historical enmity between Japan and South Korea. In this survey, on a scale of 0 (very negative) to 100 (very positive), of the 1,000 South Koreans who were surveyed, feelings toward China averaged 26.5 compared to 30.7 for Japan and 69.1 for the United States.⁴⁸

While defense threats and risks have dominated South Korea's national security landscape, the country is facing a growing array of economic and technology-related threats. The irony of Seoul's expanding threat landscape is that it is based on its remarkable economic transformation since the 1970s. After going from being one of Asia's poorest countries to the world's tenth-largest economy and the fifth-largest trading power, the flip side of South Korea's economic success is its growing vulnerability to nontraditional security threats. Nearly three years of living through the coronavirus pandemic has awoken South Koreans to the real perils of these threats. South Koreans are more aware of nontraditional security threats such as cybersecurity (77.8 percent) and pandemics (73.2 percent). More importantly, according to the 2021 KNDU poll, 78.8 percent felt that South Korea should prepare for nontraditional and nonmilitary security threats. Among experts, 96.7 percent answered affirmatively.⁴⁹

Reforming the ROK's National Security Grid

The vast array of multifaceted threats that South Korea faces has raised the possibility of institutional reforms to match the scale of these challenges. Wholesale national security reforms only usually happen after a major war (like World War II) or a catastrophic attack (like the 9/11 terrorist strikes). In the United States, intelligence reforms were instituted after the Watergate scandal, strategic lessons from the Vietnamese War, bottom-up reviews after the end of the Cold War, and 9/11. Partial or wholesale reviews took place but perhaps none more important than the passage of the 1947 National Security Act, which created the Department of Defense, the National Security Council, and the Central Intelligence Agency (CIA). In the aftermath of the 9/11 attacks, the Department of Homeland Security was established in addition to the Office of the Director of National Intelligence.

There have been numerous cases of state-sponsored terrorism by North Korea since the Korean War. Among the most notable was the October 1983 killing of twenty-one people (including members of then president Chun Doo-hwan's entourage) in Yangon, Myanmar, by North Korean bombs. And on November 29, 1987, North Korean agents planted a bomb on Korean Air Flight 858, which flew from Baghdad with a brief layover in Abu Dhabi. All 115 passengers and crew members were killed when it detonated.⁵⁰ In June 1999 and June 2002, the South Korean and North Korean navies clashed in the Western Sea (Yellow Sea) when North Korean patrol vessels attacked South Korean corvettes. On March 26, 2010, an ROK Navy vessel called *Cheonan* was destroyed by a North Korean torpedo in an incident that resulted in forty-six deaths.⁵¹ It was the most lethal North Korean attack since the Korean War. Then president Lee Myung-bak confronted another major North Korean provocation on November 23, 2010, when North Korean artillery shelled South Korea's Yeonpyeong Island. Two ROK military personnel were killed and fifteen were wounded.⁵² Lee initially ordered that retaliatory measures should be taken but not at the risk of escalation. He came under withering criticism for not ordering decisive reprisals against North Korean forces.

As noted previously, South Korea also has faced key economic crises such as the 1987 Asian financial crisis, which led to massive structural reforms. In 1979 and 1980, the South Korean economy registered negative growth on the heels of Park's assassination in October 1979 and massive political disruptions throughout 1980 including the brutal military crackdown in Gwangju in May 1980.⁵³ The subprime mortgage crisis in 2007 and 2008 that led to the global financial crisis also affected the South Korean economy. According to OEC world data, in 2020, 24.7 percent of South Korean exports went to China (and an additional 5.82 percent to Hong Kong), followed by the United States (14.1 percent) and Vietnam (9 percent).⁵⁴ Due to the pandemic and changes in global supply chains, however, data

from the Korea International Trade Association indicated that from January–June 2022, exports to China were \$81.4 billion, up 6.9 percent from the previous year. But exports to the United States increased by a larger margin of 18.2 percent, reaching \$54.9 billion from January–June 2022 and accounting for 15.7 percent of South Korea’s total exports.⁵⁵ Disruptions to free trade, the rise of new trade blocs, and new protectionist measures have had major repercussions for South Korea’s long-term economic competitiveness. On top of trade disruptions and supply chain worries, South Korea must pay greater attention to continuing spillover effects from intensifying U.S.-China technology competition.

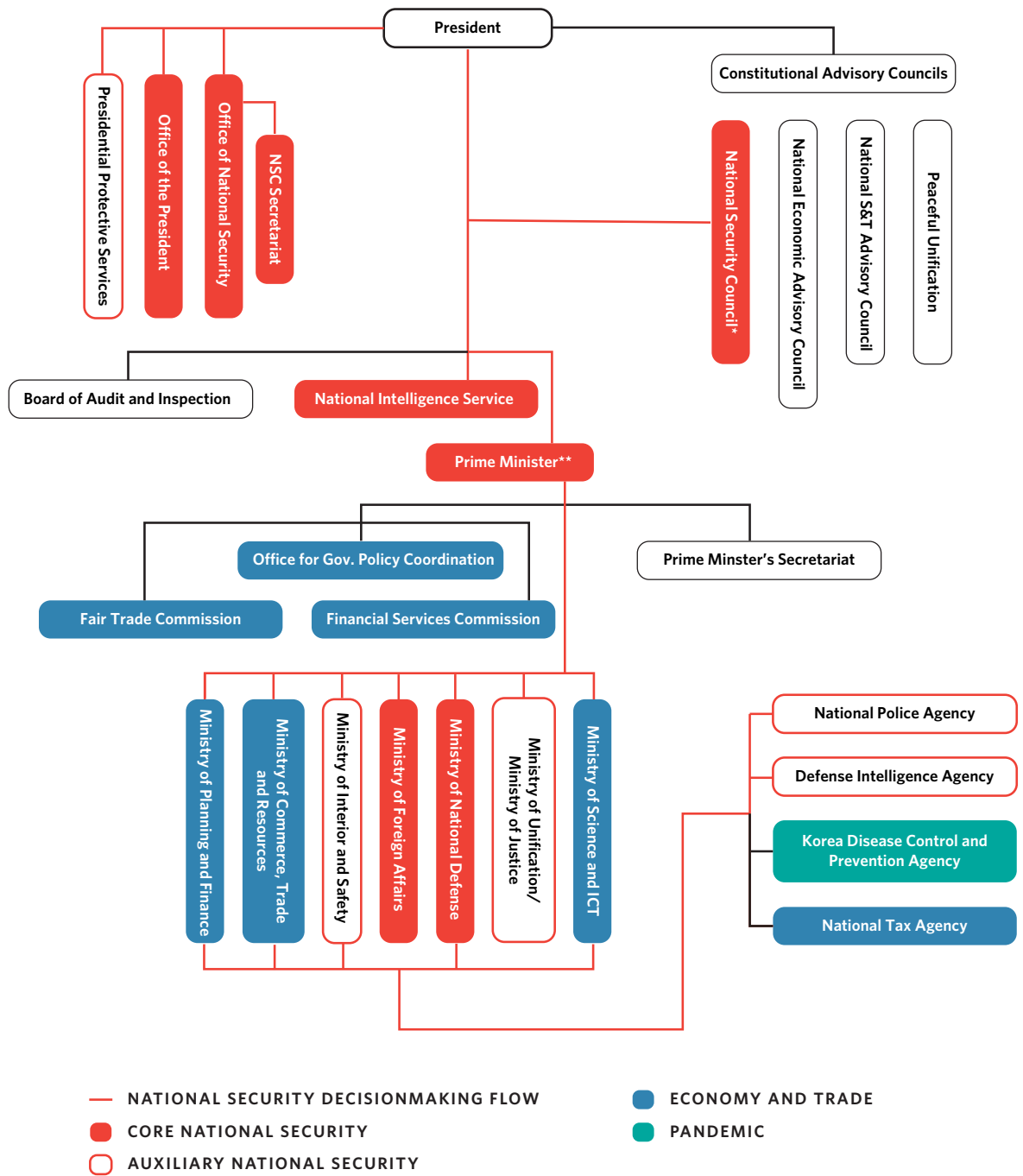
In October 2022, the Biden administration announced “sweeping export controls that will severely complicate efforts by Chinese companies to develop cutting-edge technologies with military applications.”⁵⁶ Given South Korea’s leading edge on semiconductors and the importance of the Chinese and U.S. markets, Seoul is worried that South Korean companies will also be prevented from exporting high-end chips to China. As one U.S.-China and technology expert noted, the recent U.S. move was a “major watershed”; the United States “has essentially declared war on China’s ability to advance the country’s use of high-performance computing for economic and security gains.”⁵⁷ For its part, Beijing is betting that such U.S. moves will spur Chinese self-sufficiency in semiconductors and that regardless of growing U.S. pressure, China’s R&D efforts on AI and quantum computing, for example, will eventually overtake U.S. efforts.

South Korea’s Existing National Security Framework

As illustrated in figures 12 and 13 below, Seoul’s current national security grid has remained fairly unchanged since the 2000s, although incoming administrations have made some tweaks to specific offices and personnel in the Office of the President. The administration of Roh Moo-hyun (2003–2008) was the first South Korean government to create the post of director of national security (equivalent to the U.S. national security adviser), and all successive administrations since then have retained the basic framework, as seen in figure 14. The current Yoon government created the post of secretary for economic security in May 2022. The senior secretary for economic affairs, the secretary for economy and finance, and secretary for industrial policy oversee the coordination of economic policies and strategies together with the relevant ministries, the prime minister as well as the president, and the Office for Government Policy Coordination—a critical subcabinet office in charge of the day-to-day management of domestic policies.

Given the high concentration of power in the South Korean presidency, all presidents have opted to run national security from the Office of the President through either their senior secretaries for foreign and national security affairs (prior to 2003) and the Office of National Security Affairs thereafter.

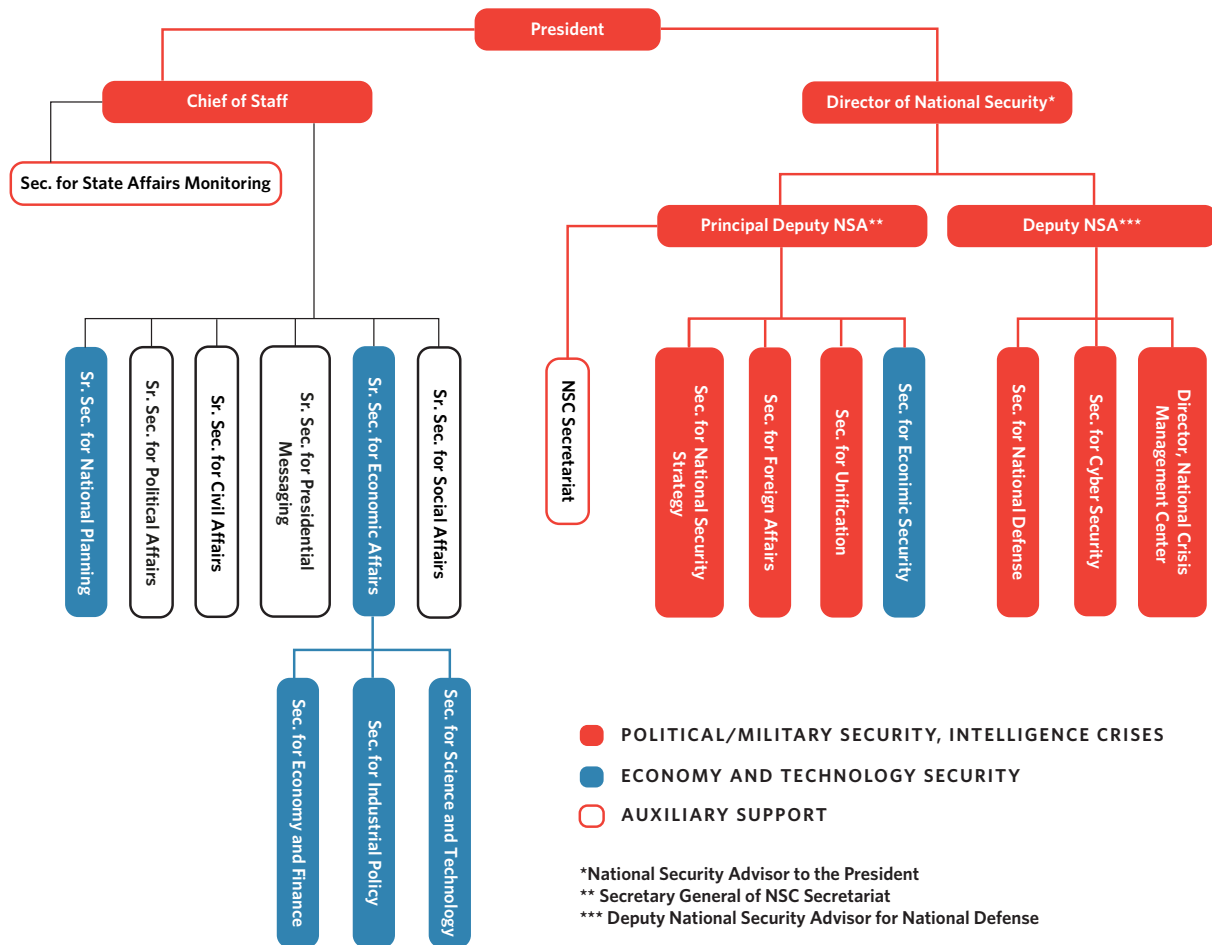
Figure 12. The ROK Government's National Security-Related Organizational Flow



Source: Author's assessment and "Republic of Korea: Policy Briefing," South Korean Office of Government Affairs, accessed November 17, 2022, <https://www.korea.kr/introduce/deptIntroduce.do>.

Notes: * The National Security Council is a statutory body, but the director of national security oversees the national security secretariat through the deputy director and is primarily responsible for implementing the president's directives. ** The prime minister presides over eighteen ministries, nine agencies, and eighteen subministerial agencies. However, while the prime minister is the nominally the second in command, he does not have any direct responsibility for national security affairs."

Figure 13. Office of the President and Office of National Security (National Security Related-Offices)



Source: "Office of the President, Republic of Korea," accessed November 17, 2022, https://www.president.go.kr/ko/group_new.php and author's own assessments.

The current system is headed by a director, principal deputy director, and deputy director. During Park's presidency (2013–2017), the national security office was run by the director of national security with a senior secretary for foreign and national security affairs. While some new secretaries have been appointed by the Yoon administration (such as the secretary for economic security), much of the basic structure has remained unchanged. Given the growing importance of cybersecurity, a secretary of cybersecurity has been a feature of the president's office over the past decade.

No flowchart fully reflects decisionmaking processes, the impact an office or unit has on affecting the flow of key papers and documents (including intelligence briefings), or the political forces that determine one's effectiveness, such as presidential support or external pressures. The president also taps into informal national security networks, absorbs domestic and foreign press reports, and most importantly, applies their own intuition on a range of national security issues. What is increasingly critical to the South Korean president is the growing importance of economic security and intelligence, the impact of technologies on national security, and limited measures to offset abrupt changes in the global economy. In November 2022 during a meeting on the sidelines of the East Asia Summit in Phnom Penh, Cambodia, the leaders of the United States, South Korea, and Japan pledged to work closely on key security and economic issues given the "importance of trilateral cooperation to strengthen the rules-based economic order to enhance economic security." Washington, Seoul, and Tokyo also agreed to begin a trilateral dialogue on economic security.⁵⁸ The growing U.S.-China technology tug-of-war, for example, is just one facet of how governments are at the forefront of new protectionist measures when it comes to retaining national technological edges while denying an adversary's access to national security-related technologies. If nuclear weapons and ballistic missiles entered the national security lexicon after World War II, the post-pandemic world's major security threat drivers will likely be economic disruptions and technology diffusion. This is especially true for a country like South Korea that is so dependent on foreign trade and global supply chains and so vulnerable to intensifying global economic competition.

Like in most governments, those in power in South Korea rarely have direct economic or technology backgrounds. Unsurprisingly, the ROK continues to place a premium on meeting a range of geopolitical threats such as North Korea's rapidly maturing nuclear capabilities; China's growing anti-access, area-denial assets, which could disrupt, deter, or even selectively rollback U.S. military operations and reinforcements; and the potential for Sino-North Korean and even Russian-North Korean military cooperation in major crises or conflicts. Alliance management also incorporates intensified crisis management as evinced by the fallout of Trump's denigration of the alliance, vitriolic opposition to U.S.-ROK military exercises, and threats to withdraw U.S. forces if Seoul did not exponentially increase its annual defense-sharing costs from about \$1 billion to \$5 billion.⁵⁹

As noted above, previous governments conducted defense reviews, such as the Roh administration, which began negotiations with the United States to revert full operational control over the ROK forces to accentuate the importance of a more self-reliant defense posture. The Lee administration's Defense Reform Plan 307 stressed strengthening the ROK military's jointness, especially in the aftermath of the 2010 North Korean attacks. Under the Park administration, the ROK formalized its so-called three-axis system to defend against North Korea's nuclear weapons and ballistic missiles, and while the Moon government maintained it, it sometimes used different names. The South Korean three axis consists of systems known as (1) Kill Chain, (2) Korea Air and Missile Defense, and (3) Korea Massive Punishment and Retaliation. In essence, the three-axis package is designed to thwart North Korean attacks as effectively as possible with South Korea's own counteroffensive strike capabilities as well as missile defense. Crucially, however, South Korea continues to rely on U.S. extended deterrence in the face of North Korea's growing nuclear weapons capabilities. How effective South Korea's non-nuclear forces are likely to remain, including its three-axis system, depends on numerous factors such as the ROK's ability to manufacture and deploy much larger numbers of key ballistic missiles such as the Hyunmoo-4 (and under development, the Hyunmoo-5), enhanced intelligence, surveillance, and reconnaissance or ISR assets (especially an array of micro satellites), and sustained defense budgetary support. The Yoon administration revived the three-axis concept and stated that it would strengthen it in the face of a nuclear-armed North Korea. In October 2022, the South Korean government announced that it planned to set aside \$21 billion to enhance its three-axis defense system from 2023 to 2027 and allocated the money to some ninety-three different defense development and procurement projects.⁶⁰

A notable development in the Yoon government is the establishment of a Joint Strategic Command, which will unify South Korea's counterstrike capabilities under the three services by 2024. While details remain limited, a unified command would include the Hyunmoo surface-to-surface missiles; air defense batteries such as Patriots; ISR assets; and SLBMs. According to press reports, the new command would also oversee cyber warfare operations and, over time, space-based capabilities.⁶¹ At the tail end of the Moon administration, the Ministry of National Defense established a Strategic Missile Command under the army and the Missile Defense Command under the air force. As the ROK gathers enhanced ISR capabilities, the military believes that together with strengthened U.S.-ROK extended deterrence, South Korea will be able to meet the full array of threats from the North. Although improving South Korea's strike capabilities augments deterrence, if North Korea conducts a seventh nuclear test soon (as many expect), South Korea must rethink the best way of maintaining deterrence. A robust U.S.-ROK alliance remains as the best deterrent, but if Trump reenters the White House or a president with similar worldviews assumes office, alliance cohesion and the viability of U.S. extended deterrence cannot help but be questioned.

The Need for a Bottom-up Review

For the ROK, traditional approaches to national security no longer suffice. Emphasizing the importance of economic security is a step forward. But it is only a small step toward significantly upgrading and resetting South Korea's national security grid. What is needed is a fundamental review and overhaul akin to the 9/11 Commission and follow-on measures in the United States. The South Korean national security system needs an overhaul because of rising vulnerabilities and emerging drivers:

- a nuclear-armed North Korea with tactical nuclear warheads including SLBMs;
- China's accelerated military modernization and buildup that could severely undermine South Korean as well as USFK and USFJ operations in a major conflict on the Korean Peninsula;
- Deepening U.S.-China strategic rivalry and competition in military, economic, and technological domains;
- the growing importance of economic security and, increasingly, the securitization of critical technologies and matching intelligence capabilities;
- critical manpower shortages in the armed forces due to demographic shifts and the need to optimize technology-intensive modernization coupled with enhanced warfighting capabilities;
- the unparalleled importance of technology firms, including defense corporations, in shaping the contours of AI-driven military modernization;
- domestic political shifts in the United States that could significantly impact the longer-term efficacy of U.S. extended deterrence;
- South Korea's growing exposure to key regional contingencies such as a massive military crisis in Taiwan and out-of-area threats (such as the ongoing war in Ukraine);
- Rising opportunity costs owing to deepening political enmity between the major political parties and polarization that severely constraints the building of a more bipartisan national security paradigm; and
- the need to build and strengthen secure channels of communication and collaboration with key allies and partners across the world but especially in the Indo-Pacific and with the EU and NATO.

To the greatest extent possible, the Yoon administration should stress bipartisan national security reforms, although deeply divisive domestic politics and entrenched approaches to North Korea significantly inhibit across-the-aisle cooperation. But it is still possible for the government to undertake a series of measures to help improve and modernize certain elements of the country's national security apparatus. Again, all governments have stressed various defense reforms, since they provide political mileage for undertaking tangible force improvements. However, given the convergence of multiple threats, unparalleled global economic and technological disruptions, and the growing magnitude of threats from North Korea and China, the government should seriously consider the following steps to upgrade and augment South Korea's national security framework.

Establishing a Presidential National Security Review Commission

The South Korean government should create a presidential commission to undertake a comprehensive national security review. To be sure, how the president adopts core national security reform proposals depends heavily on the level of presidential interest, political feasibility, and level of bipartisan support and participation. While defense reforms are increasingly important amid the multiple challenges South Korea faces (even in the face of mounting military manpower shortages), no president has ever conducted a comprehensive national security review. The sinking of the *Cheonan* in April 2010 and the subsequent multinational investigation team's report would have been an ideal moment to upgrade South Korea's national security framework. While the Lee administration created a defense reform commission to review military lessons and upgrades, there was no comprehensive national security review. In part, this was because the Lee administration was entering its final two years in office (in 2011–2012) and had very limited bandwidth or political capital as political parties (both ruling and opposition) turned their attention to the then-critical December 2012 presidential election.

The Russian invasion of Ukraine in February 2022 has triggered concerns in South Korea, such as the repercussions for energy and food prices as well as exacerbating global supply chain shortages already strained due to the pandemic. Yoon has also been consistently vociferous in his condemnation of Russia's brutal invasion. But perhaps the biggest lesson for South Korea is the possibility of a major Taiwan crisis precipitated by Chinese military operations. Clearly, there is no direct link between the Russian invasion of Ukraine and what the Chinese leadership may opt to do in Taiwan. Nevertheless, the Ukrainian war highlighted awareness in South Korea of possible Chinese actions vis-à-vis Taiwan. As CIA Director William Burns stated in July 2022, "our sense is that it probably affects less the question of whether the Chinese leadership might choose some years down the road to use force to control Taiwan, but how and when they would do it."⁶²

If such a commission is created, it should cover all facets of national security given that such an effort has never been undertaken by any government. As noted above, even after North Korea's first nuclear test in 2006 and the sinking of a ROK naval vessel in 2010, no comprehensive national security review was undertaken. Specifically, such a review should include the following:

- a whole-of-government approach that encompasses all critical elements of national security;
- a thorough assessment of South Korea's mid- to longer-term intelligence requirements and needs;
- a review of existing decisionmaking structures and national security-related ministries and agencies and, if necessary, adopting organizational reforms including the setting up of new offices or agencies;
- an assessment of the necessity and desirability of forming an economic and technology security committee within the National Security Council to spearhead all-source collection and coordination of inter-governmental guidelines and policies;
- the creation of new channels of communication and cooperation of critical economic and technology intelligence and information with the active participation of government-funded research institutes;
- enhanced government and private sector cooperation on economic and technology intelligence while fully respecting privacy issues and necessary firewalls;
- strengthened national security cooperation, including economic and technology security issues with allies and key partners including key members of the Association of Southeast Asian Nations, Japan, Australia, key NATO members, and Israel; and
- a published national security strategy white paper within the first year of the new administration.

Optimizing the Intelligence Community for an Evolving Landscape

The history of South Korea's National Intelligence Service (NIS) dates back to 1961 with the founding of the Korean Central Intelligence Agency (KCIA) shortly after the military coup of May 1961. In 1981, the KCIA was renamed the Agency for National Security Planning when the director of the KCIA assassinated Park in October 1979. Then president Kim Dae-jung renamed it the NIS in January 1999.⁶³ Prior to democratization in 1987, South Korea's main intelligence agency was heavily involved in domestic politics and served as an indispensable coercive arm of authoritarian governments. Under a revised NIS Law passed

in October 2021, the NIS is forbidden from undertaking domestic intelligence operations unless specifically related to counterintelligence under stringent guidelines or when intelligence collection and operations are conducted against such organizations or individuals under the National Security Law.⁶⁴ The bill was passed by the Moon administration with nominal bipartisan support.

Australia offers one example of a move that South Korea could consider. In 2017, Australia followed the United States by deciding to create its Office of National Intelligence responsible for coordinating the intelligence functions of the country's six main intelligence agencies.⁶⁵ A parliamentary review in part concluded, "in our view, that pace of change is set to intensify with the major influences on Australia's national security outlook over the coming decade coalescing around three key focal points: fundamental changes in the international system, extremism with global reach and the security and societal consequences of accelerating technological change."⁶⁶ After the passage of the Office of National Intelligence Act in November 2018, the office was launched in December 2018 and brought together nine organizations within the Australian intelligence community, including key offices such as the Australian Secret Intelligence Service, Australian Security Intelligence Organisation, and the Defense Intelligence Organisation.⁶⁷

Whether South Korea needs its own version of a national intelligence office needs to be assessed thoroughly. Given the NIS's undisputed authority within the South Korean intelligence community, there is likely to be enormous resistance from the NIS for creating a Korean office of national intelligence. For its part, the Ministry of National Defense and the military with its intelligence agencies such as the Defense Intelligence Agency, Defense Intelligence Command, and Korea Imagery Processing Center, among others, are also likely to challenge the creation of a South Korean national intelligence office since it would place military intelligence organizations under nominal civilian control. What is undeniable, however, is that the NIS and defense-related intelligence organizations have only limited built-in expertise on increasingly complex economic and technology intelligence. Although major ministries in charge of economic, finance, trade, and industrial policies have significant know-how, their organizational structures are not geared for comprehensive intelligence collection, analysis, and dissemination. Nor is the Ministry of Science and ICT really suited for collecting technology-related intelligence. There are key research centers such as the Science and Technology Policy Institute, but they are not designed or staffed for intelligence collection and analysis purposes.

Prioritizing Economic and Technology Security

In May 2022, the Japanese Diet passed a piece of legislation on economic security that, according to one expert, will "bring Japan's infrastructure, technology and supply chains under greater watch" and task government ministries with implementation.⁶⁸ Key priorities include securing crucial supply chain materials such as semiconductors, strengthening the security of basic infrastructure, accelerating research on innovation

and technology development, and classifying certain Japanese patents to protect critical technologies.⁶⁹ Earlier, in April 2020, Japan's National Security Secretariat added an economic division, and in October 2021, Prime Minister Kishida Fumio created a new cabinet-level minister for economic security. In March 2022, the Diet also passed the Economic Security Promotion Act.⁷⁰

For South Korea, which faces similar geoeconomic and technological challenges, it makes sense to create a new ministry or at least a cabinet-level office that deals exclusively with economic and technology security. The Office of National Security that currently houses a secretary for economic security is woefully inadequate in meeting the exponentially rising economic security threats and risks South Korea is contending with. The same holds true for technology intelligence and policy coordination. Given accelerating Chinese inroads in AI, quantum computing, and nuclear fusion and South Korea's need to maintain a leading edge in semiconductors and other critical high-end technologies, technology intelligence cannot be relegated below traditional national security agendas. Indeed, in many ways, they are more important. The Office for Government Policy Coordination (OPC) in the Prime Minister's Secretariat is the clearinghouse for virtually all national policies and is headed by a minister of the OPC and two vice ministers. Within the OPC are several director generals, including for foreign affairs and national security, economic and financial policy, and industry, science, and small and medium-sized enterprises. The OPC handles economic security and technology policy coordination, but it is simply overwhelmed by running the country's government machinery. Adding economic security to its already bloated mandate is not the answer.

What is needed is enhanced intelligence, information, policy, and strategy coordination in the Office of the President, although Yoon argued during the transition that presidential office personnel will be slimmed down.⁷¹ But given the magnitude of threats and challenges relating to economic security and technology, creating a third office such as an office of economic and technology security in the president's office would be a major step toward significantly strengthening the ROK's approach to economic and technology security. In addition, corporations are on the front lines of unparalleled economic and technological warfare. Virtually every aspect of intensifying U.S.-China economic and technology competition has enormous implications for South Korean firms. Creating channels of communication and cooperation are essential especially as foreign intelligence operations expand against South Korean firms.

Conclusion

All major countries face hybrid threats, and South Korea is not unique in that respect. Still, the combined magnitude and intensity of the geopolitical, geoeconomic, and technological risks confronting the country are unprecedented in its history. Whether Seoul can weather

these cascading crises and enact institutional and bipartisan national security reforms remains uncertain. But while the country's existing national security framework has been updated from time to time, the ROK has never conducted a whole-of-government review and necessary overhaul of its national security apparatus. Modernizing and improving South Korea's command and control mechanisms, reforming the intelligence community, injecting economic and technological intelligence at all key levels of national security planning, and finding ways to cooperate with the private sector to build more resilient supply chains are key tasks that must be addressed. Such preparations would help Seoul face the simultaneous crises at its doorstep including a fully nuclear-capable North Korea, rising spillovers from U.S.-China competition, severe economic dislocations, unparalleled foreign intelligence operations against South Korean firms, and worsening global technology competition.

Going forward, the ability of South Korea's national security system to formulate and implement timely and effective policies and countermeasures will become increasingly tested. Japan also faces a similar national security situation. But as explained above, Japan's focus on economic security and statecraft for much of the post-World War II era has provided it with significant bureaucratic advantages. Moreover, given the longevity of the Liberal Democratic Party's dominance of Japanese politics for more than sixty years, policy consistency (albeit in a heavily bureaucratized form), including on foreign and security affairs, has been a hallmark of the Japanese national security system.

Meanwhile, South Korea's national security grid remains largely unchanged. So far, changes in government between the left and the right have resulted in major security policy shifts including different approaches to North Korea, alliance management with the United States, ties to China, and depth of global engagement. One major reason why a comprehensive national security review has not been undertaken by previous governments is because once a new administration comes into office, they spend a lot of time and political capital on course corrections with little time or, equally important, political will to conduct a thorough national security review.

If the left continues to espouse policies that underemphasize the North Korean threat, bow to harsher Chinese demands, and distance South Korea from the United States and Japan, Seoul's ability to cope with the many crises it is grappling with today and will face tomorrow will weaken considerably. Equally significant is the need for the right to place greater emphasis on modernizing and upgrading South Korea's existing national security system. Strengthening the country's core alliance with the United States is a cornerstone of Yoon's national security policy in addition to becoming a "global pivotal state".⁷² But if the ROK is to play a greater international role commensurate with its growing economic, technological, and military capabilities, it must do so based on a comprehensive national security review and the reforms that such an exercise endorses. A robust U.S.-ROK alliance is a key facet of enhancing South Korea's strategic capabilities, but it is only one dimension of an overall strategy that incorporates complementary and necessary national security reforms at home.

About the Author

Chung Min Lee is a senior fellow in Carnegie's Asia Program. He is an expert on Korean and Northeast Asian security, defense, intelligence, and crisis management.

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