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About 38 North

38 North is an authoritative source of policy and technical analysis regarding North Korea's internal and external affairs. It aims to facilitate an informed public policy debate about peace and security on the Korean Peninsula and provide policymakers, practitioners, and other stakeholders with data and insights that may enhance understanding of one of the world's most complex security dilemmas.

About North Korea Briefing

The Stimson Center's 38 North is pleased to publish the sixth volume of ***North Korea Briefing***, a quarterly report analyzing North Korea's domestic developments and its foreign and national security policies.

North Korea is becoming an increasingly consequential actor in Northeast Asia. Once viewed primarily as an impoverished nation posing a chronic proliferation problem, Pyongyang now has more leverage and agency than in previous decades through its advancing nuclear, missile, and conventional weapons programs, expanding hybrid warfare capabilities, and deepening strategic alignment with both China and Russia. Its actions increasingly intersect with broader geopolitical developments, including the prolonged Russia-Ukraine war, ongoing US-China competition, China's tensions with Taiwan and Japan, and the hardening of rival security blocs in Northeast Asia. As a result, understanding how Pyongyang perceives regional and international developments—and how domestic political, economic, and social dynamics shape its decisions—is no longer a narrow Korea issue but an essential component of assessing the region's evolving security order.

Despite North Korea's growing strategic importance, it remains one of the world's most difficult countries to understand, owing to its opacity and the persistent gaps and inaccuracies in outside reporting. *North Korea Briefing* seeks to help bridge that gap through quarterly analysis of North Korea's official statements and state media rhetoric across five key issue areas: politics, the economy, social developments, missiles and weapons of mass destruction, and foreign policy, including inter-Korean relations. The report draws mainly on North Korean primary sources while incorporating external reporting and research where appropriate.

We hope this report provides timely and actionable insights into the domestic and external factors that shape North Korea's strategic calculus and contributes to enhancing public discourse on this critical intelligence challenge.

For comments or feedback on this product, contact us at 38north@stimson.org.

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Scope and Methodology

This volume covers events and developments in North Korea during the third quarter of 2026, from July 1 to September 30, across six chapters: politics, economic policy, society and technology, conventional and emerging capabilities, missiles and weapons of mass destruction (WMD), and foreign policy. The scope of each chapter is defined as follows:

Politics: Broader leadership trends, domestic political developments, and shifts in rhetoric on key ideological or domestic policy issues

Economic Policy: Economic policy direction, notable economic initiatives, and external economic relations

Society and Technology: Social and cultural developments, the role of science and technology in society, and related policy

Conventional and Emerging Capabilities: Developments in conventional military forces and weapons systems, emerging military technologies and capabilities, and related policy

Missiles and WMD: Missile, nuclear and other WMD-related activities, key technological advancements, and related policy.

Foreign policy: Positions on key international and foreign policy issues and foreign relations, including inter-Korean ties

All chapters use North Korean state media as their primary source, supplemented by secondary sources such as reporting from third-country media outlets and think tank analyses.

Foreword

Rachel Minyoung Lee

During the third quarter of 2026, North Korea continued implementing policies across the political, economic, defense, and foreign policy domains set at the Ninth Party Congress and further elaborated in the months that followed.

Several developments reflected greater attention to making policies, structures, and capabilities function in practice. Newly disclosed revisions to the Workers' Party charter largely formalized powers already exercised by Kim Jong Un and existing Party practices, while the public handling of a former senior military official's case illustrated the limits placed on officials exercising authority delegated by the central leadership. Economic reporting similarly focused less on the expansion of productive capacity alone and more on sustaining production, including by improving coal and power generation and keeping new regional factories supplied and operating.

Military developments were another indication that Pyongyang's focus is not limited to acquiring new capabilities. North Korea commissioned its second 5,000-tonne destroyer and prepared to deploy nuclear-capable 600 mm multiple rocket launchers (MRLs) near the inter-Korean border, while a September drill integrating drones, cruise missiles, MRLs, and ballistic missiles demonstrated continued efforts to coordinate the use of different weapons systems for multiple targets. At the same time, North Korea continued its lengthy pause in strategic missile launches, suggesting that the absence of such tests should not be equated with a broader slowdown in military development.

Externally, Pyongyang continued to strengthen relations with both China and Russia, but the two relationships remain different in character. Relations with China continued their gradual recovery following the June Kim-Xi summit, while cooperation with Russia remained broader and more operational, encompassing diplomatic, military, economic, and logistical ties. Toward the United States, North Korea went beyond emphasizing the irreversibility of its nuclear status to pointing to circumstances under which it might use nuclear weapons, even as Kim Yo Jong characterized the personal relationship between Kim Jong Un and President Trump as "excellent."

This volume of North Korea Briefing examines these developments from six perspectives.

Sohee Hwang examines the revised Workers' Party charter and the dismissal, prosecution, and public censure of former senior military official Pak Hui Chol. She argues that the two developments illuminate complementary aspects of political authority under Kim Jong Un: the charter more explicitly formalizes powers the North Korean leader is already exercising, while Pak's case demonstrates the limits placed on officials exercising authority delegated by the central leadership.

Mitsuhiro Mimura examines North Korea's growing emphasis on sustaining production alongside expanding productive capacity. Focusing on coal and electric power, regional industry factories, and wheat, he finds growing attention to the inputs, infrastructure, technical capabilities, and processing capacity needed to keep production running and, in the case of wheat, build a more integrated domestic production system.

Martyn Williams explores two developments in North Korean consumer life: the legalization and regulation of private car ownership and the promotion of state-run lotteries. Both expand options available to consumers, but within systems that allow the state to regulate transactions and, in the case of automobile ownership, prices and movement.

Kyung-Joo Jeon examines North Korea's expanding conventional and emerging military capabilities. She assesses the planned deployment of nuclear-capable 600 mm MRLs near the inter-Korean border, the expanded mandate of the country's principal intelligence organization, the commissioning of a second 5,000-tonne destroyer, and a mixed-salvo drill integrating several types of weapons. She argues that North Korea is expanding capabilities that can be used below the threshold of armed conflict and could support all-domain operations in wartime.

Vann H. Van Diepen examines the variation among estimates of North Korea's nuclear weapons stockpile and the continued absence of strategic missile launches. He also assesses North Korea's theater missile activity during the quarter and reports that Russia is seeking a larger variant of the KN-23 short-range ballistic missile. He argues that the strategic missile launch drought highlights the importance of political factors in the timing and circumstances of North Korean strategic missile launches, even as activity involving shorter-range systems continues.

Kibum Han assesses North Korea's relations with China, Russia, and the United States. He argues that North Korea is seeking to benefit from closer relations with both China and Russia while preserving room for strategic autonomy. He finds gradual improvement in relations with China but a deeper and more operational relationship with Russia. Toward the United States, Han argues that North Korea continued to leave room for leader-level engagement while rejecting denuclearization as a basis for negotiations.

Authors

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Politics

Sohee Hwang

North Korea's New Party Rules and the Limitations of Delegated Authority

In the third quarter of 2026, two major developments offered a window into North Korea's political system. The first was the disclosure of previously unavailable details of the revised Workers' Party of Korea (WPK) charter adopted at the Ninth Party Congress. The second was the dismissal, prosecution, and public censure of Pak Hui Chol, a member of North Korea's military elite. At first glance, these developments may appear unrelated. Read together, however, they shed light on the formalization and limits of delegated authority under Kim Jong Un. [1]

The Revised Party Bylines

The Ninth Party Congress in February revised the Party charter, but state media did not disclose the changes in detail. In early September, a South Korean government-funded think tank released the full text of the revised charter, revealing changes in three main areas.

First, the revised charter defines Kim Jong Un's political authority in greater detail, specifying the general secretary's powers to appoint and dismiss Politburo members and dissolve Party departments. It also includes a new provision allowing the general secretary to directly admit to the Party individuals who have made outstanding contributions. Second, on inter-Korean relations, the revised charter removed references to South Korea and unification, including those concerning the Party's longstanding goals of promoting revolutionary change and building ties with sympathetic organizations in South Korea. Third, the charter adjusted the roles and authority of Party organizations and the responsibilities of various decision-making bodies. Among other changes, it requires the Central Military Commission (CMC) to report its activities to a Party plenary meeting at least once every six months.

These changes broadly correspond to the constitutional revisions adopted by the Supreme People's Assembly (SPA) in March and released in full by the South Korean Unification Ministry in May. Both sets of revisions further formalized the power Kim Jong Un already exercised within the Party and state

[1] "Legibility" may offer a useful conceptual lens for examining North Korea's political and leadership developments. One hypothesis is that legibility operates asymmetrically: upward, by making the exercise of authority and the formation of personal networks more identifiable to the leadership; and downward, by making the leadership's ultimate authority and the limits of delegated power clearer to elites. Unlike visibility, which simply describes whether information is made public, legibility concerns whether behavior can be interpreted through institutional categories and linked to accountability and punishment.

and reflected North Korea's changed inter-Korean policy. The revised constitution defines its territory as the northern part of the Korean Peninsula and removes references to unification.

Context and Implications

The Party charter revisions raise an important question: Were these provisions intended to provide an institutional basis for greater authority, or did they simply formalize powers Kim Jong Un already exercised without explicit authorization in the charter?

In North Korea, formal institutions do not necessarily constrain the leader. They can also formalize existing practices and power. The Kim Jong Il era offers one example. No Party Congress was held during his rule, which relied heavily on personal directives, even as constitutional changes formalized the National Defense Commission's central role in the state. Under Kim Jong Un, Jang Song Thaek's dismissal from office and expulsion from the Party in 2013 were decided at an enlarged Political Bureau meeting, in violation of the Party charter's requirement to take such steps at a Party Central Committee plenary meeting. The use of a Party institution to sanction Jang did not, in itself, demonstrate an institutional constraint on Kim's authority.

Kim Jong Un has placed greater emphasis than his father on formalizing the rules governing the political system and institutionalizing the Party. Since he came to power, for example, Party Congresses have resumed on a regular schedule, and Party organizations continue to play a key role in governance.

One possible reason for trying to codify these powers is to clarify the structure of authority by specifying how power may be exercised and reaffirming the leader's ultimate authority. The latest revisions should therefore not necessarily be understood as increasing Kim's power. Rather, they appear to put powers he already possessed and exercised more explicitly into writing.

Prosecution and Public Censure of Pak Hui Chol

Former Korean People's Army (KPA) General Political Bureau Vice Director Pak Hui Chol was dismissed from the Party's central leadership, prosecuted, and sentenced for "irregularities and corruption," according to North Korean state media. His case was publicized at an unusual joint Party-government-military meeting in July, where he was accused of abusing his personnel authority to facilitate the sale of official positions and accept bribes.[2] North Korea emphasized not only Pak's alleged corruption, but also his use of personnel authority to place loyalists in key military positions and cultivate personal followers. Without independent information, it is difficult to assess these allegations.

State media presented Pak's case as proceeding through Party and judicial institutions. The CMC initiated an investigation in late June, after which the Second Plenary Meeting of the Ninth Party Central Committee dismissed him from the Party's central leadership and transferred him to law enforcement.

[2] The Ninth Party Congress had also emphasized combating corruption, adding illicit accumulation of wealth to Article 4, Paragraph 6 of the revised Party charter.

The Supreme Court subsequently issued a verdict and imposed punishment on Pak and others implicated in the case. The July 10 joint meeting publicized the alleged offenses and judicial outcome, and Kim explained their political significance to the assembled officials. The sentences were not disclosed.

Context and Implications

Public disclosure is an important distinction in how North Korea treats those who fall from political favor. Some have lost their positions without public allegations of wrongdoing, while others have been publicly denounced.

For example, in July 2012, then CMC Vice Chairman Ri Yong Ho was abruptly removed from all posts, officially for health reasons, without public denunciation or disclosure of political wrongdoing. By contrast, the December 2013 execution of Jang Song Thaek involved extensive public denunciation of his alleged factionalism. Both had been viewed as key players likely to exert significant influence during the early years of Kim Jong Un's rule. The contrast suggests that removal from power did not necessarily entail public condemnation; in Jang's case, publicly detailing his alleged wrongdoing added a further element of punishment and warning.

Pak was officially accused of corruption and abuse of personnel authority rather than factionalism. Nevertheless, the public handling of his case resembled aspects of Jang's treatment, though on a far more limited scale: state media publicized the investigation, alleged offenses, and judicial outcome. The comparison concerns the public presentation of the cases, rather than suggesting that Pak's alleged misconduct constituted factionalism.

In Pak's case, the political dimension was evident in the official account itself. The July 10 joint meeting alleged that he used appointment authority to place people loyal to him in important posts and that these practices obstructed the Party's monolithic command system across the army. The leadership thus presented his conduct as a threat to central control as well as a case of corruption. Publicizing the allegations before Party, government, and military officials gave the case broader political significance.

As in Jang's case, public denunciation defined unacceptable conduct and served as a warning to other officials. In Pak's case, that warning concerned the use of delegated military appointment authority to cultivate personal influence. By publicizing Pak's alleged misuse of personnel authority, Kim underscored that such authority is delegated by the Party Central Committee and cannot be treated as an individual official's private resource.

In sum, the Party charter revisions and Pak's case illuminate two complementary aspects of governance under Kim Jong Un. The charter formalizes the structure of political authority, while the public presentation of Pak's prosecution and punishment reinforces the boundaries within which delegated authority may be exercised. Neither development necessarily indicates greater institutional constraint on Kim himself.

Mitsuhiro Mimura

Sustaining Production: Coal, Regional Industry, and a Domestic Wheat Economy

North Korea's third-quarter economic reporting suggests that Pyongyang has continued to emphasize not only expanding productive capacity but also sustaining production and building more integrated domestic production systems. Three developments stand out: modernization of the coal and power sectors; efforts to keep new regional industry factories supplied and operating; and the construction of a domestic wheat economy linking cultivation, machinery, processing, and consumption.

Modernizing the Coal and Electric Power Sectors

An August 1 article in the government daily Minju Joson described strengthening the coal sector as strategically important for completing the new five-year plan and for the country's subsequent medium- and long-term economic development.[1] Coal is essential for steelmaking, fertilizer production, and thermal power generation; the article argued that stronger production would support both the current and later economic plans.

In another article later that month, the same daily said coal output needed to keep pace with economic expansion to ease electricity shortages and sustain factory operations.[2] Researchers and technicians were reportedly working to mechanize underground operations, develop mining machinery suited to domestic conditions, and modernize machinery factories and repair facilities.

In addition to improving coal production, this effort also seems to emphasize using coal more efficiently. A September 1 Minju Joson report said the Pyongyang Thermal Electric Power Plant had increased electricity production to more than 1.1 times the previous year's level while saving coal each month.[3] It

[1] Jo Chol Jin, "석탄공업부문의 세기적변혁은 인민이 반기고 환호하는 우리 국가의 새로운 변화를 안아올 거창한 혁명사업 [The Epochal Transformation of the Coal Industry Is a Grand Revolutionary Undertaking That Will Bring About New Changes Welcomed by the People]," Minju Joson, August 1, 2026.

[2] Kim Won, "<석탄증산으로 인민경제의 안정적이며 지속적인 발전을 믿음직하게 담보하자> 석탄공업은 자립경제발전의 척후전선 [Let Us Reliably Ensure the Stable and Sustained Development of the People's Economy by Increasing Coal Production -- The Coal Industry Is the Vanguard Front of the Development of the Self-Reliant Economy]," Minju Joson, August 27, 2026.

[3] Korean Central News Agency (KCNA), "지난해보다 전력생산 1.1배이상 증가, 매월 많은 석탄 절약 [Electricity Production Increases to More Than 1.1 Times Last Year's Level, Large Amounts of Coal Saved Each Month]," Minju Joson, September 1, 2026.

attributed the gains to improved combustion, equipment management, and longer operating periods for generating units.

Context and Implications

Third-quarter reporting suggests a two-track strategy to reduce the economy's vulnerability to coal and power shortages: increase domestic production capacity while using coal more efficiently. Weak coal supply can disrupt power generation, metallurgy, and fertilizer production. The Ninth Party Congress and subsequent meetings elevated coal sector modernization accordingly. In his policy speech to the Supreme People's Assembly in March, Kim Jong Un said the country's economic growth hinged on the electric power and coal industries and called for increasing production in these two sectors. Kim's March 16 visit to the Chonsong Youth Coal Mine and his speech to the mine's workers and officials also underscored the political weight attached to the sector.

Keeping the New Regional Factories Running

Until recently, much of the coverage of the 20x10 regional development policy—Kim Jong Un's plan to build regional industry factories in 20 cities and counties each year for a decade—has focused on construction and inauguration. In the third quarter of this year, however, state media began paying more attention to their operation. On July 31, for example, Minju Joson reported that factories in roughly one-fifth of the country's cities and counties had entered a course of "normalized production," citing increases in production and net income at selected factories.[4] These official claims do not establish profitability, but the indicators show a shift in reporting toward performance after construction.

Subsequent reports emphasized product quality, raw material supplies, equipment maintenance, and trained personnel. An August 6 report cited Kim as saying that the factories should make a practical contribution to improving local living standards and pursue "expanded reproduction," pointing to an emphasis on sustaining and expanding operations after construction.[5]

Context and Implications

Building a factory does not ensure continuous inputs, trained workers, functioning machinery, competitive products, or demand. These become the constraints once construction ends. Third-quarter coverage increasingly highlighted the elements needed to sustain regional production: local raw materials, factory operations, technical improvement, product diversification, quality control, and local consumption.

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[4] Ri Chol Su, "생산정상화의 동음과 더불어 꽃펴나는 새 생활, 새 문명 [New Life and Civilization Blossoming Along With the Sound of Normalized Production]," Minju Joson, July 31, 2026.

[5] 제품의 질제고사업에 힘을 넣어: 옷공장에서 [Putting Effort Into Improving Product Quality: At a Garment Factory]," Minju Joson, August 6, 2026.

This approach is consistent with earlier official reporting. At the inauguration of the regional industry factories in Jongphyong County in December 2025, Kim instructed officials and employees to regard the people's demands and evaluation as an absolute criterion and to manage and operate the factories responsibly to maintain high productivity.[6] Product quality was another concern. During his December 2025 visit to Jongphyong County, Kim personally tasted wheat sauce and paste and gave instructions on improving the quality of the wheat sauce.[7]

The challenge for the 20x10 policy is increasingly whether factories can sustain operations after inauguration. The repeated focus on raw material bases, technical capability, and product quality suggests that the North Korean leadership's attention is increasingly turning from whether factories are being built to whether they can normalize production.

Building a Domestic Wheat Economy

The clearest example of an effort to build an entire domestic production chain, however, may be wheat.

An August 27 Minju Joson article described the shift in grain production over the past several years from one dominated by rice and corn toward rice and wheat, linking it to a policy aimed at shifting diets toward white rice and wheat-flour foods and changing dietary habits.[8] The policy dates to 2021, when Kim Jong Un called for a major shift in crop allocation toward rice, wheat, and barley, including more than doubling the area sown to wheat and barley.[9]

The effort extends beyond cultivation. The article emphasized expanding flour and processed food production and establishing processing bases in major wheat-growing areas, warning that processing delays could cause losses and weaken farmers' incentives. Agricultural machinery is another component: on September 2, Minju Joson reported that the Haeju Farm Machine Factory had produced several hundred wheat and barley seeders ahead of schedule.[10]

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[6] "정평군 지방공업공장, 종합봉사소 준공식 성대히 진행 [Regional Industry Factories and Leisure Complex Inaugurated With Splendor in Jongphyong County]," Rodong Sinmun, December 25, 2025.

[7] "인민을 위한 끊임없는 헌신의 길에서 [Along a Path of Endless Devotion to the People]," Rodong Sinmun, March 20, 2026.

[8] Jo Un Hye, "알곡생산구조의 변혁과 더불어 꽃펴나는 새 생활, 새 문화 [New Life and Culture Blossoming Along With a Transformation in the Grain Production Structure]," Minju Joson, August 27, 2026.

[9] "경애하는 김정은동지께서 력사적인 시정연설《사회주의건설의 새로운 발전을 위한 당면투쟁방향에 대하여》를 하시였다 [Respected and Beloved Comrade Kim Jong Un Made a Historic Policy Speech "On the Immediate Direction of the Struggle for the New Development of Socialist Construction"]," Rodong Sinmun, September 30, 2021.

[10] Jang Hyon Il, "수백대의 능률높은 밀보리파종기 생산 [Hundreds of High-Efficiency Wheat and Barley Seeders Produced]," Minju Joson, September 2, 2026.

These efforts suggest an attempt to develop a domestic wheat economy encompassing cultivation, agricultural machinery, and processing, while also seeking to shift consumption toward wheat-based foods.

Context and Implications

The chain runs from cultivation and agricultural machinery through harvesting, milling, and processed foods to consumption.

A shift toward wheat would be difficult to sustain if demand for wheat-flour foods grew faster than domestic agriculture and processing could supply them. Conversely, greater output would have limited value without capacity to mill and process the harvest.

The policy appears to address both sides: domestic production and processing capacity on the supply side, and efforts to shift dietary habits toward wheat-based foods on the consumption side.

"Domestic" does not mean every input must be produced in North Korea or that imports are inconsistent with the strategy. The August 27 article points to an effort to build a more domestically integrated wheat system, linking increased production with expanded processing capacity. The goal is better understood as reducing external dependence on the core food system than eliminating trade.

Wheat thus resembles coal and regional industry in reflecting a broader effort to move beyond simply expanding productive capacity, whether by sustaining its operation or by building more integrated domestic production systems.

Society and Technology

Martyn Williams

Private Cars and State Lotteries in North Korea

North Korea's authorization of private car ownership and its promotion of state-run lotteries point to new ways of serving and drawing revenue from consumers. The automobile law, amended in 2025 and obtained by the author in the third quarter of 2026, sets conditions for buying, selling, and driving cars, while recent lottery promotions show the state using games of chance and electronic payments. Both developments expand consumer options within systems the state can regulate and monitor.

The Rules Behind Pyongyang's Automobile Boom

In the shadow of the Juche Tower in Pyongyang stands a three-floor glass-and-steel parking structure outside the Taedonggang Beer Restaurant. That would have been out of place in North Korea until recently, but it is a sign of growing private car ownership and a sizable wealthy class, at least in Pyongyang.

Private ownership of cars was banned until October 2024, when a new law changed that. The law was amended in January 2025 and the author obtained a copy of that version in July 2026. The law sets the conditions under which citizens can buy, own, operate, and sell cars.[1] There's a limit of one car per household, owners must be at least 18 years old, and they must have a driving license. Active-duty military personnel cannot own cars. Driving licenses can be obtained through a 40-day training course held outside working hours or on Sundays or holidays.

Prospective buyers need to submit an application to the state, their identification card, and driving license. Cars must be bought through and sold back to licensed dealerships. That appears to rule out private sales (person to person), apparently helping the state maintain control of the market, uphold official prices, and collect taxes. The law provides for pre-orders and electronic payments, ostensibly to make purchases more convenient. This likely also enables closer oversight of transactions.

At least two car dealerships are part of the Hwasong development that has transformed northeastern Pyongyang. In April 2025, Kim Jong Un visited one, the Misan Automobile Technology Service Center, while touring the fourth-stage Hwasong District.

The cars available are generally imported from China and include several Chinese brands along with some Japanese and Western ones, but no South Korean models. The state sets prices, which are premium. At the top end, a 2020 Lexus LX570 SUV cost $250,000 and a Mercedes Benz S450L cost $190,000, according to NK News, citing photos taken in Pyongyang in early 2026. The Lexus price is double the

[1] "자가용승용차리용법 [Private Passenger Car Use Law]," January 28, 2025.

manufacturer's retail price and the Mercedes at a 30 percent premium, according to the report. At the lower end, a Chinese account on X reported cars are available for around $15,000.[2]

Even with a car, citizens are not allowed unrestricted travel. For "long-distance travel," drivers need to apply to a security agency for approval, depending on the region. The law does not specify which regions need approval, but it bars vehicles registered outside Pyongyang from being driven in the capital.

The law also takes into account the effects of more cars on everyday life. It calls on "relevant design institutions, urban management institutions, and construction institutions" to build parking lots, service stations, and gas stations in urban plans. Additionally, it states that cars must be parked in lots, garages, or designated places without obstructing traffic or pedestrians, which is a possible reason for the new parking structure outside the Taedonggang Beer Restaurant.

Context and Implications

While some facilities in North Korea already contain car parking spaces, they remain uncommon. Similar structures may thus become more common. Foreign tourists also report more cars on the streets of Pyongyang, many with the yellow license plates that denote private ownership.

The new ownership rules create a legal market for private vehicles while keeping sales, prices, travel, and related infrastructure under state supervision. The parking structure and reported increase in cars suggest that the changes are becoming visible in Pyongyang, although the available observations do not establish how widespread private ownership is beyond the capital.

More Ways to Lose Money

State lotteries and other games of chance appear to be a new way the state is persuading people to part with their hard-earned cash. In recent months, Chinese citizens in Pyongyang and Rason have posted details of two games on social media.

The first was a World Cup lottery, although its connection to the tournament beyond the ticket sale dates is unclear.[3] Winning numbers were drawn on July 20, three days after the World Cup ended.

The lottery offered 100,000 tickets at 50,000 won each (around US$0.72), with the top prize at 500 million won (US$7,245). Total prize money was 3.25 billion won (US$47,101), leaving the state sports lottery administration (체육추첨관리소) a 1.75 billion won (US$25,362) cut, should all tickets have been sold. A poster at a Pyongyang street stand noted that prizes would be paid out via an electronic wallet, a further sign of the state's push to digitize payments.

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[2] Sally, @JustCherry__, X, September 13, 2025.

[3] Sally, @JustCherry__ on X, July 22, 2026.

A second video showed a visitor playing a scratch card game in Rason. Six tickets offered the top prize: a 65-inch LCD TV. Other prizes included a heater, electric fan, Bluetooth watch, and a handheld fan.[4]

Context and Implications

Keen readers of North Korean law will know that Article 296 of the criminal code outlaws gambling. "In cases where a person gambles by staking assets worth approximately 30,000 won or more per year, or gambles for approximately 30 hours or more or on 15 or more occasions per year, the person shall be sentenced to correctional labor for a term of up to five years."

Despite the law, gambling has been permitted in international hotels to foreign nationals. It is unclear if the law applies to state-run lotteries, either because they are not classified as gambling or because they are run by the state.

The lottery promotions suggest that the state is willing to offer regulated games of chance while criminalizing private gambling. Payment through an electronic wallet would also bring lottery transactions into the expanding digital payment system. The available examples do not show how widely such games are offered or whether all advertised tickets were sold.

These new lotteries are another way the state is seeking to soak up idle cash in the market as it tightens its grip on the economy.

[4] Sally, @JustCherry__ on X, September 8, 2026

Conventional and Emerging Capabilities

Kyung-Joo Jeon

North Korea's Expanding Military Capabilities Across Domains

In the third quarter of 2026, North Korea continued to strengthen its conventional and emerging military capabilities across multiple domains. It prepared to deploy nuclear-capable 600 mm multiple rocket launchers (MRLs) near the inter-Korean border, expanded its cyber and intelligence capabilities, and advanced its ambition to operate beyond coastal waters by commissioning a second 5,000-tonne destroyer. It also demonstrated a more sophisticated mixed-salvo capability, integrating drones, cruise missiles, MRLs, and ballistic missiles under a unified fire-control system. Together, these developments point to two parallel trends: Pyongyang is expanding the range of tools available to gain advantages below the threshold of armed conflict while developing capabilities across multiple domains that could support all-domain operations in wartime.

Strategic Significance of the 600 mm MRL

North Korea continues to fortify what it calls its national border along the Military Demarcation Line (MDL). While erecting fences and laying minefields in the border area, it has also been preparing to deploy 600 mm MRLs along its "southern border," according to an August 2026 South Korean Ministry of National Defense report. The deployment of the 600 mm "super-large" MRL, known as the KN-25, near the inter-Korean border is of particular concern because North Korea claims the system can carry the Hwasan-31 tactical nuclear warhead.

Pyongyang on September 22 tested "updated," "range-extended" 240 mm controlled MRLs, with claimed ranges of 100 km and up to 115 km, depending on flight mode. According to North Korean state media, defense cadres characterized the development as assuring North Korea of "a significant change in the firepower readiness along the southern border," underscoring Pyongyang's continued emphasis on strengthening artillery and long-range strike capabilities along the border.

Context and Implications

According to the South Korean Defense Ministry, North Korea was preparing to deploy KN-25s along the border. This appears consistent with Kim Jong Un's May order to strengthen front-line units guarding the "southern border" and fortify the border line. It also follows a July Party Central Military Commission (CMC) decision to modernize military bases.

North Korea's older MRLs were primarily designed to saturate broad areas with fire. Newer systems, however, appear to follow quasi-ballistic trajectories and incorporate guidance systems intended to improve accuracy at longer ranges. During a March 2020 drill, North Korea already demonstrated reduced launch intervals of only tens of seconds.

Deploying nuclear-capable weapons near the border increases the visibility and immediacy of the threat to South Korea while also significantly raising the risk of an accidental clash escalating into a nuclear war. North Korea's efforts to fortify the border, therefore, may be intended in part to reduce the risk of inadvertent escalation even as Pyongyang continues to build up its forces in the area.

Expanded Mandate of Principal Intelligence Organization

One development from the Kim-led July CMC meeting that deserves particular attention was the renaming of the Reconnaissance General Bureau (RGB). The RGB, which had focused heavily on intelligence collection and covert operations against South Korea while also operating abroad, became the General Reconnaissance and Intelligence Bureau (GRIB). According to the meeting readout, the CMC discussed expanding the GRIB's functions and missions, characterizing its role as "controlling the potential enemies' threats and gathering key information, and enhancing its capability of military reconnaissance and intelligence activities."

During the first half of this year alone, state-sponsored hacking groups linked to North Korea, China, and Russia conducted 158 cyberattacks, a 7.5-percent increase from the second half of the previous year. North Korean-linked operations targeted South Korea more than any other country and expanded into the cryptocurrency, information technology, and software-development sectors, using generative artificial intelligence, deepfakes, and fraudulent recruitment schemes. North Korea is also a suspected perpetrator of the August 20 theft of personal information belonging to South Korean presidential office officials.

Context and Implications

North Korea's decision to expand and strengthen the former RGB, with greater emphasis on intelligence capabilities, should also be understood in the context of Kim Jong Un's two-state policy. The restructuring comes as Pyongyang has defined South Korea as a "completely hostile state," potentially requiring changes in how its principal intelligence organization defines its missions and priorities toward the South, including cyber and cognitive warfare.

Cyber operations are an important component of North Korea's gray-zone tactics, allowing Pyongyang to exploit vulnerabilities and strengthen strategic advantages without resorting to armed conflict. Information collected and access established through such operations could also have wartime utility, including by enabling the disruption of command-and-control networks or degradation of communications.

The Kang Kon and North Korea's Ambitions in Eastern Waters

On September 6, North Korea commissioned the Kang Kon, the second Choe Hyon-class destroyer, into its East Sea Fleet at Wonsan Port. At the commissioning ceremony, Kim Jong Un declared that the 5,000-tonne destroyer would "soon be assigned with a strategic mission" as part of North Korea's nuclear counterattack system.

North Korea has sought to modernize and expand its navy since the early years of Kim Jong Un's reign, with those efforts accelerating following Kim's August 2023 call for naval modernization. Its first new 5,000-tonne destroyer, the Choe Hyon, was built at Nampo on the west coast and commissioned in June 2026. At the commissioning ceremony, Kim said North Korea would continue building 5,000-tonne warships and, over the longer term, acquire strategic vessels displacing as much as 10,000 tonnes.

Context and Implications

North Korea appears to be strengthening its naval capabilities as part of a broader ambition to become a maritime power. Traditionally, its navy has focused on coastal defense and surprise attacks, relying primarily on small surface vessels and submarines. A 5,000-tonne destroyer, however, can remain at sea for extended periods and operate much farther from the coast. North Korea is therefore attempting to move beyond what it describes as a "coastal defense navy" toward a force capable of operating across a wider maritime area.

Korea's eastern sea is particularly well suited to expanding the navy's operational reach and pursuing a longer-term maritime strategy, with deep and expansive waters, and offering relatively favorable conditions for North Korean ships to move beyond coastal waters toward Japan and the western Pacific. The area could become increasingly important if North Korea seeks to develop the ability to operate more distant naval operations, establish sea-based strike capabilities against South Korea or Japan, or threaten US reinforcements approaching the Korean Peninsula during a contingency.

It could also provide a natural operating space for future joint exercises and expanded military-technical cooperation with Russia's Pacific Fleet, and, potentially, China, if Pyongyang's defense cooperation with those countries expands into the maritime domain. North Korea's evolving naval activities in these waters therefore warrant continued attention.

Drill Demonstrates Mixed-Salvo Capability

On September 12, North Korea conducted a "joint firepower attack drill" to train artillery and missile units in the use of an "integrated firepower control system." According to North Korea's report, the drill involved the simultaneous use of several weapons systems, including attack drones, a tactical cruise missile, large-caliber thermobaric MRL, and a tactical ballistic missile.

Although the drill itself did not pose an immediate threat to the region, it prompted responses from both South Korea and the United States. South Korea's Office of National Security convened an emergency

meeting and condemned the launches as a violation of UN Security Council resolutions. USPACOM stated it was aware of the missile launch and was "consulting closely with allies and partners."

Context and Implications

This drill is notable for two reasons. First, it demonstrated North Korea's ability to integrate four different types of weapons into a mixed salvo. Mixed salvos have long been part of North Korean military tactics, but the growing diversity and sophistication of the systems involved deserve close attention. Although North Korea's claim that the weapons achieved "100 percent hit accuracy at a stroke" cannot be independently verified, a heterogeneous salvo could complicate detection, prioritization, and interception by confronting South Korean and US defenses simultaneously with weapons of different flight profiles, speeds, and ranges. Moreover, if North Korea were to signal that some participating systems carried nuclear warheads, this could further complicate South Korea's threat assessment and interception prioritization.

Second, the drill was conducted the day after Freedom Edge, a five-day US-South Korea-Japan exercise in international waters near South Korea's Jeju Island, and appeared to have been North Korea's response to it. The use of weapons with different ranges may also have enabled Pyongyang to explore the possibility of coordinating attacks against multiple targets at varying distances in preparation for a future conflict.

Moreover, the GRIB's expanded mandate may signal a broader geographic or functional scope for its intelligence operations. The CMC's call to expand the bureau's functions and missions in "a many-sided way" did not specify what that expansion would entail, but it could mean greater attention to targets beyond South Korea, including Japan and the United States.

Missiles and Weapons of Mass Destruction (WMD)

Vann H. Van Diepen

Nuclear Stockpile Uncertainty Amidst a Continuing Strategic Missile Launch Drought

US President Trump and South Korea's defense minister advanced differing figures for the number of North Korean nuclear weapons, underscoring key uncertainties in assessing the size of Pyongyang's stockpile. These include the amount of fissile material, the North's manufacturing capacity, the amounts and types of fissile material used in its nuclear weapons, and the proportion of different weapon designs deployed. The third quarter again featured only launches of short-range ballistic missiles (SRBMs) and land attack cruise missiles (LACMs), continuing a drought in strategic missile launches extending back to at least October 2024. This suggests the North may regard previous launches as sufficient to maintain minimum reliability in the deployed strategic force and underscores the importance of political over technical and operational factors in decisions over what missiles are launched when. Finally, Russia reportedly is seeking North Korea's scaled-up Hwasong- (HS-) 11C variant of the KN-23 SRBM, which would provide a heavier payload for use in its war with Ukraine.

Dueling Estimates Highlight North Korea Nuclear Stockpile Uncertainties

On August 19, US President Trump stated without providing further detail that North Korea "has 57 very powerful nuclear weapons." The next day, South Korea's defense minister told parliament, "We typically see that [the North has] around 80 to 120" nukes, later attributing that figure to "an estimate by a private research institute." (After the end of the quarter, on October 3, President Trump said without further explanation that Kim Jong Un had "112 nuclear missiles.")

Context and Implications

Trump's 57 number is consistent with various Western think tank analyses, including those of the Congressional Research Service (about 50 weapons and fissile material for up to 40 more), Stockholm International Peace Research Institute (60 weapons and fissile material for at least 30 more), and Federation of American Scientists (same). The ROK's (Republic of Korea; South Korea) Korean Institute for Defense Analysis has estimated the North's stockpile at 127-150 weapons, closer to the defense minister's figures and Trump's "112 nuclear missiles."

The variation among these figures underscores the uncertainty in assessing North Korean fissile material and nuclear weapons holdings. Even Western intelligence agencies probably face estimative uncertainties,

albeit hopefully to a lesser extent than outside analysts. Four key uncertainties probably underpinning different estimates are:

Amount of weapons-grade fissile material. Even open-source estimates of plutonium production at North Korea's original 5-megawatt reactor at Yongbyon should be pretty good. But production at the new experimental light water reactor (EWLR) will be harder to estimate given uncertainties over the extent to which the reactor will be used for electricity generation or tritium rather than plutonium production. Enriched uranium production is even harder to estimate given uncertainties about the North's centrifuge enrichment capacity, its use for EWLR or future nuclear submarine fuel rather than weapons, and the possible existence of additional enrichment facilities beyond Yongbyon and Kangson.

Weapons manufacturing capacity. The North's capacity for manufacturing nuclear weapons from fissile material and other components is unknown. Western estimates posit substantial amounts of fissile material not yet manufactured into weapons, suggesting manufacturing limits. But this is an assumption rather than data-driven. Meanwhile, North Korea made continued increases in nuclear weapons production a priority at the Ninth Party Congress in February, and a July 9 enlarged meeting of the Party's Central Military Commission led by Kim Jong Un "decided [inter alia] on … bolstering up the nuclear force both in quality and quantity."

Fissile material per weapon. Open-source information does not reveal the designs or amounts and mixes of fissile material used in deployed North Korean nuclear warheads. Although photos of nuclear weapons mockups can help bound estimates, it is unclear to what extent they represent deployed designs. Analysts also differ on Pyongyang's technical capabilities and therefore the amount of fissile material needed per weapon type. This is compounded by uncertainty over the extent to which the weapons use mixes of plutonium and uranium, and whether the North deploys high-yield pure fission, boosted, or thermonuclear weapons.

Mix of different weapons types. Translating fissile material production into nuclear weapon numbers also is complicated by the lack of open-source information on the stockpile's breakdown among different weapons types. A stockpile of mostly small "tactical" nuclear weapons will have different fissile material requirements than one made up mostly of high-yield pure fission or boosted weapons. Uncertainty over how many launchers and missiles North Korea has or will deploy, and the large number of delivery systems associated with nuclear weapons further complicate stockpile estimates.

Launch Activity Continues Focus on Theater Systemsl

North Korea reportedly conducted six sets of ballistic missile and LACM launches in the third quarter, three of which were reported in Pyongyang's media:

- On July 4, North Korean media reported that five "strategic cruise missiles" were launched from the Kang Kon, the second new Choe Hyon-class destroyer, as part of the ship's pre-operational sea trials. (The Kang Kon was formally commissioned into service with the East Sea Fleet on September 6, according to North Korean media.)

- On August 6, ROK and Japanese defense agencies reported the launch of a single SRBM of an unknown type "from the Wonsan area … toward the East Sea," to an unknown range.

- •On August 12, a single SRBM was launched from a similar location to a range of about 700 km and a maximum altitude of 90 km, according to the ROK and Japanese militaries. The flight characteristics suggest the use of a KN-23/Hwasong-11A SRBM.

- On August 20, according to ROK and Japanese military sources, about 10 SRBMs were launched from Pyongyang to the northeast, flying about 300 km at a maximum altitude of 90 km. The range and number of missiles suggest the use of KN-25 SRBMs, what Pyongyang terms 600-mm "super-large" multiple launch rockets.

- On September 12, North Korean media reported a "joint firepower attack drill of long-range artillery and missile units." Analysis of associated photographs suggests that at least one KN-23 and five KN-25 SRBMs, and one Hwasal-class LACM, were launched to arrive at the same impact area at about the same time. The South Korean military reported that "several" SRBMs had flown about 250 km. A number of tactical drones apparently were launched at the same target in a separate coordinated impact.

- On September 20, the North reported having "successfully tested a new-type weapon" that associated photos showed to be the HS-11E, which was revealed in October 2025 to use the larger booster of the HS-11C variant of the KN-23 SRBM to carry a hypersonic glide vehicle (HGV). Two missiles were launched, according to the South Korean military, to ranges of 450 and over 600 km. Data from the North Korean photos suggest the "HS-11E-1" flew to about 900 km on a maneuvering trajectory that might have partially gone below South Korean radar.

Context and Implications

Although Western media ascribed a political messaging purpose to the three sets of August SRBM launches related to US-ROK joint military exercises and to the North's August 19 response to US President Trump's expressed interest in meeting with Kim Jong Un, this is speculation in the absence of any North Korea statements concerning the launches. At a minimum, as with the September 12 drill, the August SRBM launches provided a crew training opportunity for the participating missile units. The September 12 drill also signaled continued North Korean interest in coordinating disparate theater strike systems to overcome alliance air and missile defenses.

The third quarter continued a drought in strategic missile launches extending back to October 2024 for intercontinental ballistic missiles (ICBMs), April 2024 for intermediate range ballistic missiles (IRBMs), December 2022 for medium-range ballistic missiles (MRBMs), and October 2019 for "true" submarine-launched ballistic missiles (SLBMs), as opposed to sub-launched KN-23 SRBMs. (The IRBM drought ended on October 3, when North Korea reported an operational troop training launch of a solid-fuel HS-16B IRBM carrying a hypersonic glide vehicle (HGV), implying the system is operational.) Although the North could resume such launches at any time, the long hiatus suggests Pyongyang may regard flight-testing to date as enough to maintain sufficient reliability of deployed missiles. It also underscores

that political factors probably continue to trump technical and operational ones in the timing and circumstances of North Korean strategic missile launches.

Russia Reportedly Seeks Larger North Korean SRBMs

Ukrainian defense intelligence reported on August 27 that Russia had asked North Korea to provide "KN-30" SRBMs. Although there is no evidence of any having been provided to date, details of the next round of North Korean shipments to Russia reportedly were to have been finalized in September.

Context and Implications

The Ukrainians are using "KN-30" to refer to the scaled-up variant of the KN-23 first flight-tested in March 2021, designated by the North Koreans as HS-11C. The HS-11C reportedly has a rocket motor about 1 m longer than the KN-23's (but the same diameter), and a payload section about 0.5 m longer. The North Koreans originally claimed the HS-11C carried a 2,500 kg warhead to a range of 600 km. In July 2024, they reported testing the "Hwasongpho-11Da-4.5," an HS-11C with a 4,500 kg warhead, to the same range. The basic KN-23 (HS-11A) is assessed to carry a 400 kg payload up to 800 km, making a 2,500 kg payload with the HS-11C's larger booster plausible. A 4,500 kg payload to 600 km is a harder sell, and South Korean assessments of that North Korean assertion as propaganda cannot be ruled out.

It is reasonable that the Russians would be interested in a larger-payload SRBM to increase damage against Ukrainian urban targets. The HS-11C also has been suspected of having an earth-penetrator role against bunkered targets, which Moscow presumably also would find useful in Ukraine. For its part, North Korea could use HS-11C combat experience to validate the missile's performance and make improvements. It remains to be seen whether the HS-11C appears in Ukraine and whether it is transferred to the Russians or deployed with a North Korean missile launch unit reportedly being stationed there again to assist Russian operations.

Foreign Policy

Kibum Han

Closer to China and Russia, Firm on Nuclear Status

In the third quarter of 2026, North Korea continued to expand relations with both China and Russia while seeking to avoid excessive dependence on either and preserve its strategic autonomy. In its messaging to the United States and the international community, Pyongyang has increasingly emphasized the irreversibility of its nuclear status and the possibility of using its nuclear forces.

China: A Limited Rapprochement

Following the June Kim-Xi summit, North Korea-China relations improved most visibly in the political and diplomatic spheres, while bilateral trade continued its post-pandemic recovery and military-to-military contacts showed signs of renewed activity.

The two countries exchanged high-level delegations in July to mark the 65th anniversary of their Treaty of Friendship, Cooperation and Mutual Assistance. Premier Pak Thae Song visited China and met with Xi Jinping, while Wang Huning, chairman of the National Committee of the Chinese People's Political Consultative Conference, visited North Korea and met with Kim Jong Un. Both sides reaffirmed the treaty's significance and their commitment to implementing the agreements reached at the June summit.[1] Pak also visited the Beijing Rail Transit Command Center, while Wang's delegation toured the Wonsan coastal tourist area, suggesting efforts to promote urban development cooperation and Chinese tourism to North Korea.

Kim's third-quarter correspondence with Xi emphasized developing bilateral relations around their shared socialist cause, with his July message calling for elevating ties to a "new strategic level."[2] Military cooperation also appeared to advance, at least outwardly. In July, North Korea's defense minister attended

[1] In his talks with Pak, Xi called for developing bilateral ties in that way that "serves our respective socialist cause and modernization" and "defend[ing] our respective sovereignty, security and development interests, and create[ing] a favorable external environment" for both countries. This suggests that China was expressing support for North Korea's development while also signaling an interest in closer strategic coordination in responding to external pressure. See "President Xi Jinping Meets with DPRK's Premier of the Cabinet Pak Thae Song," Chinese Ministry of Foreign Affairs, July 10, 2026, https://www.fmprc.gov.cn/mfa_eng/xw/zyxw/202607/t20260710_11979902.html.

[2] For example, see "Respected Comrade Kim Jong Un Sends Congratulatory Message to Comrade Xi Jinping, General Secretary of C.C., CPC and President of PRC," Korean Central News Agency (KCNA), July 11, 2026, https://koreanewsservice.com/en-news/respected-comrade-kim-jong-un-sends-congratulatory-message-to-comrade-xi-jinping-general-secretary-of-c-c-cpc-and-president-of-prc-2/; "Respected Comrade Kim Jong Un Sends Reply Message to President of PRC," September 13, 2026, https://koreanewsservice.com/en-news/respected-comrade-kim-jong-un-sends-reply-message-to-president-of-prc-2/.

the Chinese Embassy's reception marking the 99th anniversary of the People's Liberation Army, an upgrade from a vice minister's attendance in 2025. In September, a North Korean vice defense minister also attended the Beijing Xiangshan Forum, China's version of the Shangri-La Dialogue, marking the first vice-minister-level North Korean delegation since 2019.

Bilateral trade reached approximately $1.51 billion in the first half of 2026, up 19.6 percent from the same period in 2025. Last year's total had already recovered to 98.1 percent of its 2019 level. If the trend continues, annual trade could exceed its pre-pandemic level. Reports that the New Yalu River Bridge could open in October suggest bilateral trade may expand further.

Context and Implications

Despite the gradual recovery following Xi's June visit, it is difficult to regard this as a return to a more China-centered foreign policy. Bilateral trade has recovered substantially, but major new economic initiatives remain limited, with the New Yalu River Bridge still unopened. Military contacts have increased, but publicly observable steps toward substantive defense cooperation remain limited. The limited scope of cooperation is consistent with North Korea's longstanding desire to preserve strategic autonomy even as it improves relations with China.

China, meanwhile, signaled a strong interest in further developing the relationship, as reflected in Xi's remarks at the June summit and Foreign Minister Wang Yi's comments during his August visit to South Korea. Wang spoke of the two Koreas moving toward "peaceful coexistence" while omitting "denuclearization." These developments suggest Beijing may be placing greater weight on managing relations with Pyongyang than on publicly reiterating positions that could create friction with North Korea.

Russia: Deepening an Operational Alliance

In July, Foreign Minister Choe Son Hui made a high level visit to Russia; in September, Russia's deputy foreign minister said Kim Jong Un had been invited to Russia and the two countries would coordinate dates for a visit. North Korean arms supplies continued, while the September opening of the first road bridge across the Tumen River expanded cross-border logistics infrastructure.

Choe visited Russia from July 18 to 21, meeting President Vladimir Putin and holding the third strategic dialogue with Foreign Minister Sergey Lavrov. The ministers reviewed implementation of the 2024 comprehensive strategic partnership treaty and discussed strengthening high-level exchanges and coordinating responses to international developments. They reaffirmed "their steadfast political will to accelerate the long-term multi-faceted development of the bilateral relations, reinforcing indications that the diplomatic and security relationship is on a long-term track extending beyond immediate wartime cooperation.

Although neither country specifically mentioned bilateral military cooperation in its readout of the strategic dialogue, cooperation continued. Ukrainian intelligence reported continued North Korean

missile transfers to Russia and that a North Korean missile unit had begun deploying there. In an August 19 statement, Kim Yo Jong dismissed reports of additional troop deployment as an "ungrounded farce" but defended the legitimacy of existing military cooperation. On August 28, Lavrov said North Korean soldiers were the only foreign troops that had been "in the trenches" alongside Russia in the war against Ukraine.

Economic cooperation, meanwhile, continued to expand beyond trade into labor and logistics. An estimated 15,000 to 30,000 North Korean workers were already in Russia, and August reports pointed to an increasing presence of North Korean women in manufacturing, agriculture, logistics and service sector jobs. The September opening of the Tumen River road bridge linking Rason and Khasan also improved the infrastructure supporting bilateral logistics cooperation.

Context and Implications

If North Korea portrays its relationship with China as moving toward strategic cooperation, it describes its relationship with Russia as having progressed a step further—toward consolidating an alliance and building a long-term partnership. Similarly, while North Korea-China exchanges and Kim-Xi correspondence have largely focused on the future direction of cooperation, North Korea-Russia strategic dialogues and Kim-Putin letters have emphasized ongoing areas of joint work.

Kim's replies to Xi and Putin around the anniversary of North Korea's state founding illustrate this distinction. In his September 12 message to Xi, Kim remained within the established framework of "traditional relations of friendship" and put forward the abstract goal of safeguarding "the common cause of socialism." By contrast, his September 14 message to Putin foregrounded the ongoing "alliance" and called for "expand[ing] and deepen[ing] the joint work with the Russian Federation in a comprehensive way." The messages thus emphasized traditional and ideological ties with China, compared with a greater focus on deepening current strategic and military cooperation with Russia.

North Korea's economic cooperation with China far exceeds that with Russia in scale and scope. Cooperation with Russia differs, however, in that it is part of a broader relationship that includes active military cooperation. Pyongyang appears to be using the complementary aspects of the two relationships to maximize practical benefits from both countries. In particular, it appears to be prioritizing comprehensive cooperation with Russia and using that relationship to calibrate cooperation with China.

If the Tumen River bridge increases logistics flows and becomes a route for North Korean workers, raw materials, and manufactured goods, it could help make economic cooperation with Russia more regular and sustained.

United States: Nuclear Status and Nuclear-Use Signaling

North Korea's rhetoric toward the United States increasingly emphasized two themes in the third quarter: the irreversibility of its nuclear status and the circumstances under which it might use nuclear

weapons. Pyongyang also continued to distinguish the personal relationship between the North Korean and US leaders from what it regards as Washington's "hostile policy."

In an August 19 statement, Kim Yo Jong described the Trump-Kim relationship as "still excellent," the while insisting that US policy toward North Korea had not changed. An August 31 Foreign Ministry spokesperson criticized the US State Department's reaffirmation of complete denuclearization and the US military's decision to proceed with a trilateral exercise with South Korea and Japan, pledging to respond to Washington's "invariable hostile policy with the toughest stand to the last." In response to an IAEA General Conference resolution, Kim Yo Jong on September 19 characterized North Korea's nuclear forces as "the most important matter for the national security" and firmly rejected denuclearization. Choe Son Hui's September 24 statement similarly condemned a US-South Korea-Japan joint statement reaffirming their commitment to North Korea's "complete denuclearization."

In September, North Korea also placed greater rhetorical emphasis on potential nuclear use. At the commissioning of the destroyer Kang Kon, Kim said the ship was part of North Korea's "nuclear counteraction system" and called for operation of nuclear combat systems to be developed "for an actual war." He warned that he would order the use of North Korea's "absolute strength" if its adversaries resorted to armed force. September 16 and 18 statements by the Defense Ministry and Kim Yo Jong similarly invoked the possibility of nuclear use in response to US and allied military activities.

Context and Implications

North Korea's recent rhetoric toward the United States has moved beyond its longstanding justification of nuclear weapons as a response to US "hostile policy" to increasingly emphasize the permanence of its nuclear status and the circumstances under which it might use nuclear weapons. This does not represent a new nuclear use doctrine—North Korea has previously specified conditions for nuclear use—but the third-quarter statements placed renewed emphasis on potential operational use. This appears aimed at reinforcing nuclear deterrent signaling while setting parameters for future diplomacy with Washington: Pyongyang will not enter negotiations premised on denuclearization.

This chapter was originally drafted in Korean. The initial translation was produced using AI tools and subsequently reviewed word-for-word and refined by a bilingual subject-matter expert to ensure accuracy and readability.