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38 NORTH SPECIAL REPORT

Where We Are and Where We Can Go on North Korea

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Where We Are and Where We Can Go on North Korea

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Introduction

The election of Donald Trump to a second presidential term provides an opportunity to reevaluate American policy towards the Democratic People's Republic of Korea (DPRK or North Korea), especially given the President's summitry with Kim Jong Un during his first term in office. Although the Biden administration's approach focused on reinforcing deterrence, the risks of conflict have grown. Tensions between Washington, Beijing and Moscow; Pyongyang's shift to closer relations with America's rivals and the growth of its WMD arsenal; as well as a burgeoning regional arms race, have only heightened the dangers.

These developments have increased the risk of:

- Greater polarization of East Asia and an accelerating regional arms race;
- Nuclear proliferation in the region which will weaken or destroy the non-proliferation regime;
- Proliferation outside of the region if Pyongyang decides to peddle its WMD wares elsewhere;
- Conflict due to misperception and miscalculation;
- Nuclear use on the Korean Peninsula that could spill over into East Asia and even the continental United States.

A new, pragmatic US policy should focus on continuing to bolster deterrence, reducing the risk of war—particularly nuclear war—and building an architecture of peace on the Korean Peninsula. Pursuing these objectives will require: 1) summit-driven diplomacy, including negotiated agreements and unilateral steps; 2) the support of Russia and China; 2) convincing Pyongyang to return to talks despite its shift away from seeking better relations with the United States and the expansion of its WMD arsenal; 3) identifying North Korea's priorities for talks; 4) and new realistic US objectives, including a near-term focus on reducing the risk of war instead of denuclearization.

None of this will be easy. Aside from needing to address more pressing foreign policy priorities in the Middle East and Europe, a new initiative will be time consuming and require a high degree of policy coordination at home and abroad. However, the dangers cited above make launching a new initiative is imperative.

The Foundation Has Crumbled

For the past 35 years, US policy towards North Korea has assumed that:

- Post-Cold War North Korea was isolated internationally, particularly on the issue of its nuclear weapons program; in addition, the DPRK nuclear and missile problem was detachable from broader superpower rivalries;
- The DPRK nuclear weapons and ballistic missile program could be halted before it matured through technology and economic embargos;
- A normalized relationship with the United States carried significant geopolitical advantages; and
- There was an inflection point in DPRK decision making that would either coerce or induce it to give up nuclear weapons.

None of these assumptions remain valid today. Pyongyang no longer places a premium on a normalized relationship with the United States. North Korea's political, technological, and economic isolation ended with Kim Jong Un's full [support](#) of Vladimir Putin's aggression against Ukraine. The Chinese, too, have opened the spigots on [economic support](#) for North Korea, openly violating UN sanctions and seeking to end the sanctions regime against the DPRK. They also now value North Korea as a means to divert US resources and attention. As a result, Kim may believe he has considerable room to maneuver within the bubble created by his two big neighbors who are both hostile to the United States and who might compete for influence in Pyongyang.

Given North Korea's new geopolitical and diplomatic gains it is hard to see what the United States and its allies could do to induce or coerce the DPRK to denuclearize. The DPRK is a nuclear armed power with credible weapons systems, doctrine, and a significant number of nuclear warheads. It has its deterrent and at least sufficient economic and political support to develop more despite continued US, Republic of Korea (ROK or South Korea) and Japanese pressure. Perhaps more worrisome, Pyongyang might believe falsely that this could give it much more room to maneuver if it were to take provocative steps in the region.

A Room Full of Gasoline Fumes and Too Many Matchbooks

The one remaining valid assumption underpinning Washington's current policy towards North Korea is that the US must maintain credible means to deter Pyongyang from aggression against the ROK and Japan. These steps serve the additional purpose of dissuading Seoul and perhaps eventually Tokyo from acquiring their own nuclear weapons. Further nuclear proliferation in the region would indeed increase the risk of a nuclear crisis—one that could well involve the US, China, and perhaps even Russia.

It is hard to argue with enhancing deterrence, but the US build-up cannot help but fuel DPRK counter moves, increasing the risk that the two sides could well end up blundering into conflict or

creating a nuclear standoff in the region that would make conflict much worse should the global situation turn violent.

More than ever before, North Korea must be viewed in the context of a more threatening and interconnected global environment. Russia's desperation in Ukraine and need for weapons has drawn the DPRK and Iran into a "coalition of the sanctioned," thus causing Moscow to toss away its decades-long support for nuclear non-proliferation. Russia has exacerbated the damage to global nuclear stability by brandishing its own nuclear capabilities in Europe in a manner unseen since the Khrushchev era.

In short, too many different hands are holding matches in a room full of gasoline fumes. While Kim is not the lead provocateur in this environment, he will enjoy the luxury of reduced pressure as he presses forward with his agenda. One could easily imagine him miscalculating what level of protection his relationship with Putin affords him and creating an additional crisis point on the Peninsula.

US Interests in the New Environment

Given this new environment, US strategic objectives for the future should include:

- Deter a second Korean war. The United States should clearly state its commitments and the role of its nuclear weapons in protecting its allies. The purpose will be to reassure allies and deter Pyongyang and perhaps Beijing and Moscow. Finding the right balance will be difficult given pressures in Seoul to go its own nuclear way.
- Prioritize reducing the risk of nuclear war in the region over denuclearization. Risk reduction should be the main objective of a renewed American diplomatic offensive aimed at North Korea, China and Russia along with our own allies, South Korea and Japan. Denuclearization must remain a long-term objective, but Washington should find a mechanism to halt this spiral, raise the nuclear threshold and reduce the dangers of miscalculation or miscommunication.
- Build an architecture of peace on the Korean Peninsula through diplomacy aimed at North Korea, South Korea, China and Russia. Washington should offer a geopolitical escape route to North Korea from being used as cannon fodder in Russian disputes with the West. Normalizing its relationship with the US, South Korea and Japan would allow North Korea a way to side-step such a fate. Building peace may also offer an additional benefit. As threats recede, the door may be opened to arms reductions, including North Korea's WMD arsenal.

A Policy for the Future

Given the steep uphill climb the new administration will face on the Korean Peninsula and in the region, the summit-driven diplomacy pursued by President Trump during his first term will be even more critical today. Still, Washington will have to overcome challenges at home, in the region and with its rivals for its new approach to have any chance of succeeding. These include:

1. *Changing US strategic culture:* While American decision-makers tend to focus on pressing events, now in Ukraine and the Middle East, they will need to recognize that the prospect of a confrontation in the region, and the use of nuclear weapons, is a real possibility. They will also need to discard the predominate view in the American foreign policy community that any diplomacy with Pyongyang is misguided and doomed to failure. President Trump's out-of-the-box thinking about North Korea should address this second concern.

2. *Changing the international context:* A path forward on North Korea and in the region will require navigating Washington's relations with Moscow and Beijing. Both now see North Korea as their ally in the struggle with Washington. Reversing that trend and restoring consultation and even the limited cooperation of the past will require a strategy to ease great power competition combined with new efforts by the United States to emphasize the dangers of arms racing in Northeast Asia.

A lessening of US-Russia confrontation through finding a path to end the war in Ukraine, might unwind what may be more of a marriage of convenience rather than a deep alliance between Moscow and Pyongyang.

Moreover, China would not weep if Russian influence in Pyongyang declined and does not want a nuclear confrontation on its doorstep. But its willingness to work with Washington will depend on the broader US-China relationship.

3. *Altering North Korea's strategic calculus:* In addition to enhancing deterrence to counter Kim's perception of opening created by his new relationship with Russia and the view that America is on the decline, altering Kim's calculus will involve formulating new incentives for North Korea to shift away from its current policy. The North Korea of today is very different from where the Trump administration [left off](#) in the 2019 Hanoi Summit. The same incentives—lifting sanctions, establishing diplomatic relations and security guarantees—might still apply but Kim may also have a new diplomatic sweet spot if he has one at all. Finding it will be difficult but indispensable in achieving the objectives laid out above.

4. *Exerting leadership in securing allied support for the new policy:* In the past, Washington has often acceded to Seoul's wishes in formulating its policy. Given the dangerous situation in Northeast Asia, the United States must do a better job of exhibiting leadership in forging a new approach, consulting with South Korea and Japan in its formulation, but not allowing either to hold anything approaching veto power as it moves forward.

With the demise of conservative President Yoon Suk-yeol and his hardline stance towards

Pyongyang, a change in leadership will bring about an opportunity to course correct and make necessary policy adjustments that can lower tensions and create new diplomatic openings.

Still, the combination of Washington deemphasizing denuclearization with President Trump's doubts about the alliance with South Korea could provoke a crisis in the US-ROK alliance. However, if Trump's initiative brings results, including some kind of restoration in inter-Korean relations, a new South Korean administration is likely to support his efforts.

Policy Recommendations

Organize for Success

- ***Establish effective decision-making:*** In contrast to the first Trump administration, the President's top advisors now are likely to fall in line with a diplomatic initiative personally endorsed by him. However, it remains an open question whether they can shape and implement an initiative that is pragmatic and realistic. An empowered special envoy with a direct line to the president will play a critical role.
- ***Consult experienced experts:*** The US intelligence community has often provided the main source of expertise on North Korea to top decision-makers, even though it has had very little first-hand contact with Pyongyang. The American pool of individuals, in government or in the private sector, of experts who have first-hand experience has dwindled over time. Still, the new administration should establish an advisory group comprised of these individuals to help inform US policy.
- ***Impose consistent messaging:*** Inconsistent and imprecise messaging has created problems on the domestic front, magnifying impressions of disorganization and confusion as well as with North Korea, which pays close attention to US official statements. An authoritative speech laying out North Korea policy and how its approach serves US national interests would help address this problem. One theme that resonates outside the beltway is diplomacy with Pyongyang helps avoid war.

Lay the Groundwork

- ***Rebuild Great Power consultation:*** Russia's newly [established](#) close relationship with North Korea means Moscow's support will be essential for any new diplomatic initiative. A solution to the war in Ukraine would result in greater running room for Washington to encourage Moscow to rebalance its relationship with Pyongyang. Russia might also help jumpstart diplomacy by acting as an initial go-between exchanging messages between Washington and Pyongyang.

Still, Moscow will have to provide assurances to the United States that it will not transfer critical military technologies, such as multiple independently targeted reentry vehicles for ballistic missiles, to Pyongyang.

Chinese relations with North Korea have waned but securing Beijing's support will be essential. Broader issues will shape the US-Chinese relationship, but less confrontational relations could form the basis for greater consultation and help jumpstart a new initiative. There may also be room for Seoul and Tokyo to encourage Beijing given their better relationships with China.

- ***Pursue leader-to-leader diplomacy:*** A series of summits as well as a resumption of correspondence between Trump and Kim, which previously contained valuable clues about how to move forward, should be the driving-force behind the new initiative. In that context, meetings between senior officials and envoys will also be essential to set up summits and discuss key issues.

Expectations for early summits should be realistic. Their main objective should be limited to laying out a vision for how to move diplomacy forward, such as working-level discussions alternating between capitals, instructing top advisors to prepare for the next summit and planning for a series of leader-to-leader sessions. They could culminate in Trump-Kim summits in Washington and Pyongyang.

- ***Don't forget working-level contacts:*** The Trump administration's first-term diplomacy was severely handicapped by the [lack](#) of regular communication between Washington and Pyongyang. Regular channels will be crucial for progress. This could be accomplished by establishing diplomatic relations (see below), communicating through Pyongyang's mission to the United Nations or exchanges between intelligence agencies.

Build Positive Momentum

- ***Establish stability talks on reducing the danger of nuclear war:*** Rather than seeking denuclearization, the near-term priority for stability talks would be to reduce the danger of nuclear war. Participants could explain their security concerns and address measures that might alleviate those concerns. Talks could start out as a US-DPRK bilateral initiative but expand to include Russia, China, South Korea and Japan. These talks may eventually explore the possibility of cooperation on non-security issues.

- ***Move forward with diplomatic cross-recognition:*** Henry Kissinger [proposed](#) in 1975 that China and the Soviets recognize South Korea in exchange for the US and Japan recognizing North Korea. China and the Soviet Union fulfilled their part of the bargain in the early 1990s, but Washington and Tokyo did not. Diplomatic recognition early in the process would be a clear sign that the United States is serious about moving away from political hostility. With the establishment of representatives in capitals, it would also enable regular communications essential to the conduct of diplomacy.

- ***Suspend US-ROK military exercises:*** President Trump will almost certainly offer to suspend exercises in new talks with North Korea. Options would be to suspend large-scale exercises or to set a limit on the overall number. Another might be to key the move to the resumption of talks on confidence building measures or resurrecting important provisions in the 2018 [Inter-Korean Comprehensive Military Agreement](#). In that context, the two sides might also consider new provisions such as prior notification of drills.

•**Recognize that sanctions have value as positive leverage:** Sanctions lifting—unilateral as a sign of good will or as part of negotiated agreements—could help propel diplomacy forward. Some options available include: 1) sanctions where the president would not be legally constrained; 2) slow rolling enforcement of unilateral sanctions; 3) gradually lifting high value UN sanctions affecting the North Korean economy with caveat that they could snapback; and 4) the president lifting US financial sanctions, however that would require congressional support.

•**Conclude initial WMD confidence building measures:** Diplomacy cannot move forward without the cessation of Pyongyang's long-range missile and nuclear weapons tests, which would slow or even halt technological development, and serve as an essential confidence building measure. If Pyongyang is unwilling to take such a step unilaterally, the United States could suspend visits to the peninsula of long-range bombers and nuclear submarines, intended to reassure Seoul but seen as threatening in North Korea. Seoul and Tokyo could also agree to halt their conventional missile tests intended to destroy targets on land, in effect making the moratorium regional.

A formal pledge by North Korea not to transfer WMD technologies off the Peninsula during the early stages of talks is probably possible. It would replicate a commitment made in Pyongyang's 2022 law on nuclear forces. For the most part, North Korea has followed this stricture since 2007 when its program to help Syria build a nuclear reactor was discovered. One exception appears to have been an attempt in 2016 to sell lithium metal, a key ingredient for hydrogen bombs, abroad.

•**Encourage South Korea to move forward with engagement:** South Korea could work with the UN Command to determine new protocols for changing the tense and evolving border dynamics. The UN Command should push for negotiations with both the Korean People's Army and ROK military to better understand the extent of changes being planned and adapt protocols accordingly to avoid serious clashes within the demilitarized zone (DMZ) and along the Northern Limit Line (NLL).

What about Maximum Pressure?

While some administration officials may want to launch a new maximum pressure campaign, neither China nor Russia will support new sanctions and are assisting Pyongyang in circumventing existing restrictions. Moreover, neither is likely to cut their ties to Pyongyang in the face of new unilateral pressure by the United States. As a result, rounding up the usual sanctions suspects is unworkable.

If the administration is seeking to mount pressure on Pyongyang it would make more sense to target North Korea's growing use of sophisticated cyber capabilities to steal billions of dollars. The North's most recent [heist](#), \$1.5 billion from a Dubai-based crypto exchange in February 2025, far exceeds any benefits gained through more traditional means of sanctions evasion.

Granted, cyberattacks involving cryptocurrencies provide more ways to evade sanctions since, as explained in the Panel of Experts reports, they are harder to trace, can be laundered many times and are independent from government regulation. Still, an initiative

that provides for greater cooperation between governments and the private sector may be effective over time.

Such an initiative would focus on: 1) monitoring and identifying trends in cybercrime; 2) reporting out information in real-time, especially from authoritative government bodies; 3) proactive outreach to private sector emphasizing the growing importance of due diligence and cybersecurity best practices; and 4) facilitating greater information sharing mechanisms to combat a rapidly changing threat/risk environment, especially with those most vulnerable to threats.

Several practical initiatives are possible. In addition to developing real-time information sharing mechanisms that could prevent big heists, timely warnings, and guidance, for example FBI advisories, could be issued. A centralized hub of information and resources for businesses to get the latest information on the latest threats could be created. Global standards on cyber security and regulating virtual assets and cryptocurrency exchanges could be raised. Finally, institutions responsible for countering malign cyber operations at the state-level as well as criminal threats, could step up cooperation.

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