

THE STIMSON CENTER  
38 NORTH

VERBATIM TRANSCRIPT

**PRESS CALL:**  
ANALYSIS OF  
KIM JONG UN'S  
NEW YEAR'S ADDRESS

ROBERT CARLIN  
&  
JOEL WIT

MODERATOR: JENNY TOWN

JANUARY 1, 2020 AT 11:00 AM

MS. TOWN: We'll go ahead and get started, because it is New Year's Day. We know you don't all want to be on the phone forever.

So, thank you for coming. We are happy to do this again every year on New Year's Day, to interrupt all of your vacation time.

It's been an interesting 24 hours, with Kim Jong Un, instead of doing a new year's address in the way that he's done in the past, reverting to this style of doing it at a plenum meeting instead. I think we haven't really seen this – we maybe saw it once or twice with Kim Il Sung, “back in the day,” but it's been a very long time.

So, we're happy to have Robert Carlin with us, who is a longtime Korea hand. We have been looking at some of the coverage that's come out of the speech. A lot of it has talked about this idea that North Korea has been hedging their bets and providing this sort of “wait and see” attitude. I think our read on it is a little bit different.

So, I'm going to go ahead and hand it over to Bob to provide you with his analysis of what's happening. Bob, as you all know, is, these days, a non-resident fellow at Stimson Center and our 38North program and, again, has been studying this for the past 30 or so years.

So, Bob, with that, I'm going to hand it over to you.

MR. CARLIN: Great. Okay. Thank you, Jenny.

Good morning, everybody. I think we've got a real “hot potato” coming from Kim Jong Un on New Year's Day. The message that comes out of the plenum in his speech, we've got to remember, was not primarily to the US. That's how most people are going to read it, but the message in this unusually

long speech was – the North Koreans tell us it was seven hours long, so we only have a fraction of it.

The message was, first and foremost, to the Party, military, and government officials in North Korea. And, for them, the main points, almost certainly, were not headlines about weapons development or a possible resumption of testing. The message for them, I think, was essentially this: There's going to be a complete strategic policy reorientation, "soup to nuts." This is not a bluff. This is not a tactical move at the United States or at President Trump. There is no deal with the US to be had. That's what Kim told his people.

And the main points, elaborating that, were as follows: The dialogue with the US is over because it achieves nothing and leaves the country vulnerable; there is, and there's going to be, a long stalemate with the US; and the way to change this situation is not to sacrifice security through compromise and not to sacrifice what he identified as "the dignity of the country." Instead, it is to change the objective reality. That's very important.

In other words, they have to take the initiative to change the reality they're presented with right now. And he said this very clearly. I'll quote his words there. "We should not look for the way of getting ourselves 'adapted' to the objective elements, to be controlled by them in the current struggle, but should make a frontal breakthrough to put the objective elements under our country." In other words, "We are not going to turn the other cheek; we're going to take the initiative away from the Americans."

What does that mean? Fundamentally, it means preparing the economy and the people for a longterm confrontation with the US, no longer working for relief of sanctions but girding to live under them. And the key front in the offensive for such a "frontal breakthrough," he said, is "rearranging the economic foundation of the country." Big, bold, steps in other words.

So, there are two main interrelated tasks, in essence, that Kim has laid out. The first thing is to change the dynamic of the situation with the US, not through dialogue, which he claims has been proven not to work, but by confronting the Americans with a military reality that will compel them to change their fundamental approach to the DPRK. Not tinker with sanctions, but change their basic approach.

What does that mean? It means developing a stronger and more threatening nuclear force. But that's going to take resources, and for that the country is going to have to go back to something like the previous policy via Byungjin, meaning the simultaneous development of both the nuclear program and the economy.

The second task is to be ready for the response from the international community. And I'm pretty sure Kim understands that means China and Russia.

The response is probably going to be to tighten and extend sanctions, and so to cope with that the people and the economy have to be prepared to do more with less. What does that mean? That means "belt tightening, and he used that term explicitly and people in North Korea know exactly what that means, because they've been through it.

So, to complete, I think Kim's main message was that of a complete strategic policy reorientation, there is no deal to be had with the US; this is not "wait and see;" this is not tactical; this is part – this is the beginning of a longterm struggle against the United States.

I think that's what we should be focused on and not get distracted by some of the bright, shiny things Kim threw out about weapons and nuclear tests, and weapons tests.

MS. TOWN: Thanks, Bob. That's kind of a depressing way to start the new year.

Joel, why not – if you could jump in here and maybe talk about, given those messages, what are some of the implications, then, for US-DPRK relations, going forward?

MR. WIT: Sure. Thanks, Jenny. Thanks, Bob.

Bob, of course, has been following North Korea more closely than I have over the years, but I completely agree with his analysis. Let me go through what the implications are for the United States, what we should do.

But first I want to talk about something that keeps appearing in the media, and that is the possibility of a test. And what I would like to say is of course that is possible. It's possible they could have an ICBM test. It's possible they could have a nuclear test. But I would say it's highly unlikely you're going to see that in the short term.

The North Koreans aren't stupid and they know that there are implications to doing that, but they do have an alternative, and that is starting to deploy new strategic weapons, to send them into the field for everyone to see. And nowadays, as you all know, we have commercial satellite photography, so it's very easy for someone to see a new Hwasong-15 roaming the countryside on its transporter/erector/launcher. That would have an enormous impact without the down sides of an ICBM or a nuclear test.

Secondly, what should Trump do? Well, you know, I'd like to take a page from Sean Connery in "The Untouchables." I don't know how many of you are movie fans, but I think Kevin Costner, at one point, asked him "How do you win a fight with the other guy?"

And Connery says "If the other guys pulls a knife, you pull a gun."

And I think that's what we really need to do. We're in a strong position. I don't think anyone can blame the United States for how this situation has escalated over the past six months at least.

And the trick is, of course, to put together a strategy that isn't "fire and fury," but that's reasoned, well thought out, works with our allies, tries harder to work with China and Russia, and the focus needs to be to safeguard our security. So, that sounds, all sounds, very nice, but what does it mean?

First, sure, we should tighten sanctions as much as possible. I know a lot of people are saying that. But they do have serious limitations and they're not going to do the trick. They're part of our tool kit but just one piece.

Second, I think, more urgent, is we need to get our act together with the alliances we have in Northeast Asia, particularly South Korea. We need to resolve our problems over burden sharing and we need to move forward, because it's impossible to have an effective strategy to deal with North Korea without South Korea fully on board.

Third, we need to consider what additional military measures should be taken unilaterally and with our allies to respond to Kim. I'm not talking about periodically flying a B-52 over the Korean Peninsula when North Korea does something that we don't like. The North Koreans, at this point, don't care about that at all, and I think everyone knows the impact is minimal, if at all.

So, for example, should we be taking any additional steps to build up our own defenses based in the US, against a North Korean ICBM that? By that I mean building up our missile defense systems.

Secondly, should we re-start whatever joint US-ROK exercises are necessary to maintain our defenses? I think the answer is obviously yes.

But we also need to consider what might we do differently in those exercises. Do we need to have more exercises? Do we need to have more troops involved? Do we need to add new missions?

Fourth, are there any additions that we and South Korea need to make to our conventional force postures on the Peninsula to deal with the growing threat? There may be other examples but I think number one on the list of things to do is missile defense, regional missile defense in South Korea and Japan. We need to figure out how to beef that up.

And lastly, I think – and this is very important – how do we maintain our security guarantee and the promise of extended deterrence to our allies, in the face of a growing nuclear threat? There are a lot of issues to unpack here, but one of them that could come up is the issue of redeploying nuclear weapons to the Korean Peninsula.

All of these things need to be considered, and I think, at the same time, we also need to show the North Koreans and signal to them that the door is still open to talking. We're not shutting that door, but we have to do what we have to do.

Why don't I stop there, Jenny, and I'm happy to answer any questions.

MS. TOWN: Okay. Thanks, Joel.

Again, we have a lot of people on the phone, and so if you would like to ask a question, please press star-nine and it will show that you've raised your hand, and then I'll call on you in the order in which you raise your hand.

For those who are on their computers, feel free to send me a chat or send the question via chat, and I can also pose it.

While we wait for a couple of questions, Bob, if we could go back to you for a second, I'm wondering if you could talk a little bit about why Kim Jong Un might have done this speech in this format, using it as a Party Plenum speech rather than doing the typical new year's address.

MR. CARLIN: It's a good question. I suspect it's for emphasis. This was an unusually long plenum, whatever it was, four days, I think.

MS. TOWN: Yes.

MR. CARLIN: And the speech was, they tell us, seven hours long. So, that has a lot more impact than a new year's speech. And he was able, obviously, to go in a great deal more detail to the thousand or so people, officials, that were assembled.

And don't forget, this is the companion speech to what he gave at the Central Military Commission meeting on the 21<sup>st</sup> of December, where we also don't have a full readout, but it looks to be his effort to put the army on a new footing, changing deployments, changing people, changing operational plans, and so he said that before he gave this plenum speech. These things are going to be read together by top officials and it means, really, a wholesale change in how he wants to move ahead.

A new year's speech, you know, it's sort of routine. Every year you tell people to do X and Y. This is beyond that, and so I think that was the import. And that's why – I mean, he rode up Mt. Paektu on his white horse! Because he had made a major decision and he was going to present it as a major decision, to his people.

MS. TOWN: Can I ask, what do you think about consultations with China and Russia prior to this speech, given the fact that the Chinese and Russians had tried to reintroduce the UN Security Council resolution to do some partial lifting of sanctions, just last week, I believe?

MR. CARLIN: You know, even just on the 31<sup>st</sup> and the 30<sup>th</sup> –

MS. TOWN: Right. Right.

MR. CARLIN: -- they were...

I don't know whether the Chinese were trying to do that to have – to apply the brakes a little bit, so Kim wouldn't go off a cliff or what, but the Foreign Ministry spokesman, press spokesman, yesterday, I think, the 31<sup>st</sup>, sounded nervous, to me, that they hadn't succeeded and that they knew things were going to get worse.

So, at this point, I honestly don't know where Beijing and Moscow sit.

MS. TOWN: Okay. So, there's a question from Alex Ward with Vox News. He has asked "How might telling North Koreans to tighten their belts for a longterm affect Kim Jong Un's domestic politics? I'm sure some North Korean leaders will be unhappy with this development." Bob, what are your thoughts on this?

MR. CARLIN: I think that's absolutely right. I think it's – in some ways it's a gamble. Kim has been, in effect, loosening – helping them loosen – the belt over the past several years, and now to tighten it up again is going to cause, at least cause grumbling, if not worse, among some in the population, maybe some in the leadership.

But he has been gradually tightening since earlier this year. There has been a renewed emphasis in ideology. That's why people are taking a hike up Mt. Paektu to view revolutionary sites and everything.

I think – I’m pretty sure – Kim thinks he can handle this, obviously. But we need to be watching closely to see if there’s any pushback, any difficulties he has.

MS. TOWN: Does this play into – I know we’ve talked before about, sort of, the internal domestic debate that’s been going on between hardliners and the pro-diplomacy crowd. This kind of message and, again, coupling it with the Military Commission message recently seems trying to get them back on board, the more hardliners, playing into their message more. Do you see that?

MR. CARLIN: Well yeah, I – well, we’ll wait and we’ll see what shows up in the media in February and March.

I think what Kim – equally important, what Kim did was to address what I think was a philosophical basis for his engagement strategy, which was that a common understanding that they had to improve the external situation in order to provide conditions for economic progress. Kim explicitly said in his speech “That isn’t going to work. We understand that’s necessary but it’s too much sacrifice and so we’re going to have to lay that argument aside.”

I think that was directed very much at the people who would like to keep arguing that “No, no, no, we can’t afford to step away from this approach. We can’t tighten up again. In order to get the economy moving, we have to keep with the reforms and engagement with the outside.”

I think he’s come down against that, although there are some signs in his speech that he wants to preserve some parts of his economic reform program. I don’t know which parts, and we won’t know until we see this thing unfold over the months.

MS. TOWN: Okay. Great. Again, for those of you who are on the phone, if you have questions, please press star-nine and we’ll go through them in order.

For those of you who are online, if there are any more questions – I don’t see anything coming through on chat...

In the meantime, Joel – oh wait, here is one question. The last digits are 0704. Please introduce yourself and go ahead and ask your question.

QUESTION: Yes. This is Silvie Lanteaume from AFP. I have a question about the suggestion that maybe the US should redeploy nuclear weapons on the Peninsula. Do you have any indication that the South Korean government would be willing to host the nuclear weapons?

MS. TOWN: Joel, why don’t you take that?

MR. WIT: Well, I think that’s a good point, that certainly this South Korean government would not be interested in doing that, and there may be a range of other things you can do to bolster extended deterrence without taking that step, which is probably at the end of the road. But we can’t predict the future, of course, but the next South Korean government, if it is a conservative government, is going to be very much interested in doing that.

So, I think it’s something – it’s an issue that’s sort of been lurking in the background. It receded to

the background when President Moon took office and with the diplomacy of the past year or so, but it's something that I think is going to pop up more and more in the discussion of what to do.

QUESTION: Okay, thank you.

MS. TOWN: Great, thanks. Again, if there are questions on the phone, press star-nine.

I think, Joel, this brings up another question on South Korea. Obviously, this is not playing well with Moon's plans and his platform. What do you think are some of the things that South Korea may have to do now, to sort of redirect to what will inevitably be a different inter-Korean relationship?

MR. WIT: That's a good question, Jenny, and you probably know more about the answer to that than I do. But, it's certainly something – it's a potential problem between the Trump administration and South Korea, because take, for example, missile defenses. You know, that is a very logical thing that needs to be considered, given what's going on in North Korea. Yet, South Korea may hesitate, because of fears of alienating China. So, it's going to be a flashpoint, if the Trump administration pushes forward to doing that.

And I don't know. You know, there may be things in South Korea's own defense budget it can do ads well, but I'm not that much up to date on what it's doing in terms of its own defenses.

MS. TOWN: Thanks, Joel. Bob, did you have any thoughts on that as well? I know you spend a lot of time in South Korea also.

MR. CARLIN: Only that the South Korean public opinion is pretty volatile and people don't pay much attention to the threat. In normal circumstances, people just go about their business and they're sort of used to it.

But there's going to be a point, it seems to me, at which it suddenly becomes clear to them that the situation has changed dramatically, and at that point, I would think, there's going to be a pretty significant swing in public opinion. I wouldn't predict exactly when that's going to happen; it's just that we've seen the South Korean public go back and forth on things before.

And I'd like to add one quick point, about things Kim could do short of a missile launch or a nuclear test. Joel brought up a good one, which is parading an ICBM under our noses. But they could also resume Nodong and Scud launches, "to test operational readiness," is what they're going to say. That's stopping short of an ICBM test but certainly "raises the temperature."

We could see a new submarine-launched ballistic missile test. I'm trying to think what else. In other words, what Kim could do to get our attention but not go over the line, there are a lot of things he could do, to prove to his own domestic audience that he's taking a tougher route.

I would think he's going to stay in that realm until he thinks conditions are ready within his country to ensure the blowback to something really big on his part. In other words, the emphasis he's put on preparing the economy suggests that he doesn't think the situation is ripe for a really big move on his part, and obviously, we don't know when he'll make that decision, but it does suggest that he's going to wait a while, until some of the changes that he's outlined have been implemented.

MR. WIT: Jenny, can I just add two things?

MS. TOWN: Sure.

MR. WIT: First, in that vein, there have been reports that their ballistic missile submarine is ready for launching. So, why not have a big ceremony to launch their submarine? We do that, the Russians have done it, they could do that too. And I'm sure it would get an enormous amount of attention even though, quite frankly, I think their submarine – I wouldn't want to be caught in their submarine going to sea. But, in any case, that would get a lot of attention.

On the mobile ICBMs, yeah, they could do another – and, Bob, you may not have meant this – but they can do another parade, you know, in Pyongyang, of a mobile ICBM. But I mean getting it out in the field, operational, deployed. And they can do it in a way that people can see, because the North Koreans know when our commercial satellites fly overhead, where they fly overhead, so they could rig it so it's seen.

Those things would have a lot of impact and they wouldn't trigger a harsh response, particularly of sanctions.

MR. CARLIN: Actually, Kim said that – where is it? – he said something about deploying – keeping his strategic weapons deployed and sort of in readiness. So maybe that fits with what you're just saying, Joel.

MR. WIT: And he's talking about a "new strategic weapon," whatever that means, too.

MR. CARLIN: Yeah.

MR. WIT: It fits in perfectly, you know, and so everyone shouldn't be going for the bright shiny object of an ICBM or a nuclear test.

MR. CARLIN: Yeah. You know, to "twist our tail" when they launch the submarine, he could break a bottle of sanctioned champagne over it.

(Laughter.)

MR. WIT: Right.

MS. TOWN: Sanctioned whiskey.

MR. CARLIN: Yeah, right.

(Laughter.)

MS. TOWN: Great. Thanks, guys. For those of you on the phone, this is your last call for questions. Again, press star-nine if you'd like to raise your hand. While we give them a little time to think, there is one question, another question, posed by Alex Ward with Vox News. Bob, is there anything you



think the US could do to change Kim Jong Un's mind on where we stand on diplomacy?

MR. CARLIN: I don't – in the short run, I don't think so, unfortunately. It really looks to me like he's made a decision and he's "bound and determined" to move ahead with that, at least for a while. Otherwise, he would have reacted to Steve Biegun's offer to get in touch with him while he was in Seoul. And they didn't want to do that; they wanted to press ahead with this policy, "the big policy," and I can't see him shifting away from it in the short run.

MS. TOWN: Okay. So, I don't see any more questions coming through. So, again, this is January first so we're not going to belabor the point. So, thank you to everyone for joining us. If you do have some follow-up questions afterwards, please feel free to email us. Bob and Joel, thanks so much for providing the analysis today. There's a lot to think about, and 2020 should certainly be an interesting year for anyone following North Korea.

So, thanks everyone. And we will have a transcript of today's comments, so if you would like a copy, I think Natalia will be sending it out later. And again, if there are other questions, feel free to email us afterwards and we'll see what we can do. And that's it.

MR. CARLIN: Thanks, Jenny.

MS. TOWN: Happy new year, everyone.

END

Transcript by: [RichardLBoyd@gmail.com](mailto:RichardLBoyd@gmail.com)