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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 launch *North Korea Briefing*, a quarterly report analyzing North Korea's internal dynamics.

The impact of North Korea's actions is increasingly felt far beyond its borders, as it defies political and economic norms and challenges regional and global security. However, the opaque nature of the country and regime makes it one of the most difficult intelligence targets to assess. Perhaps for this reason, discussions about North Korea often center around its foreign relations and prospects for engagement, without delving deeper into key factors that shape the leadership's current and future intentions on such issues.

This new report aims to fill in some of that void by analyzing North Korean state-run media's rhetoric and signaling across five key issue areas: politics, leadership, the economy, weapons of mass destruction, and foreign policy (including inter-Korean relations).

We hope this provides useful insights into the various domestic factors that reflect or feed into the regime's strategic calculus to enhance public discourse on this important intelligence challenge.

For comments or feedback on this product, contact us at [38north@stimson.org](mailto:38north@stimson.org).

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## Scope and Methodology

This volume covers events and developments in North Korea during the second quarter of 2025 (April 1 to June 30) across five issue areas: politics, leadership, the economy, missiles and weapons of mass destruction (WMD), and foreign policy. Each issue area, or chapter, is scoped out as follows:

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

*Leadership:* Roles and functions of Party, government, and military institutions, power dynamics within the leadership, and personnel changes

*Economy:* Domestic economic indicators, economic policy, and external economic relations

*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

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

## Executive Summary

During the second quarter of 2025, North Korean state media stepped up rhetoric on Party ideology and discipline and afforded an unusual public profile to Kim's top aide Choe Ryong Hae. North Korea has yet to hold parliamentary elections, which are overdue by more than a year. Kim's daughter effectively made her diplomatic debut by accompanying him to the Russian Embassy to celebrate Russia's Victory Day, which is consistent with her growing public prominence.

The Workers' Party of Korea (WPK) Central Military Commission (CMC) carried out two important activities: an investigation into a failed ship launch, and convening of a CMC expanded meeting. The former offers greater insight into the CMC's administrative processes and shows its exercise of authority over the country's defense industry. The expanded meeting was significant for two reasons: Kim Jong Un reaffirmed the Party's precedence over the Korean People's Army (KPA), and he conducted sweeping changes in the KPA leadership ahead of the Ninth Party Congress scheduled for 2026.

Economically, a WPK plenary meeting in June reaffirmed that the revitalization and modernization of industry, rather than extensive economic development, remain the core of North Korea's economic policy, and that the WPK continues to employ a bottom-up approach by gathering each sector's opinions. In the second quarter, North Korea made more headway with construction projects, including the opening of the long-awaited Wonsan-Kalma Coastal Tourist Area. Construction projects are relatively low cost for North Korea, as it can locally produce the major raw materials and mobilize the military personnel needed for construction, providing an easy way to demonstrate efforts to improve living conditions for the people. North Korea continued to deepen economic ties with Russia by establishing transport infrastructure and stepping up educational cooperation; as well as with Belarus by holding an inter-governmental economic and trade meeting.

North Korea's missile and weapons of mass destruction (WMD) activities during the second quarter were dominated by steps to improve nuclear posture. These include a probable expansion of fissile material production for nuclear warheads; possible increased capacity to build rocket engines for strategic missiles that carry such warheads; the unveiling of new launch platforms for nuclear missiles; and proficiency training for nuclear missile launch units and command-and-control.

On the foreign policy front, North Korea continued to moderate its anti-US rhetoric, suggesting it is leaving some maneuvering space for diplomacy with the Trump administration for when the time is right. However, creating diplomatic space is not the same as being receptive to US demands. North Korea's pledge at the end of 2024 to launch "the toughest anti-U.S. counteraction," Kim's commitment to expanding nuclear capabilities, and the North's ongoing mistrust of Washington will continue to pose significant challenges. North Korea continued to expand and deepen ties with Russia and will likely prioritize this bilateral relationship at least for the foreseeable future. North Korea's subdued and limited coverage of South Korean internal affairs, coupled with its ongoing criticism of Seoul in regional security contexts, indicates Pyongyang remains uninterested in improving relations with the new South Korean government despite the latter's conciliatory measures.

## Authors

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# North Korea Remains Stable Amid Increased Emphasis on Party Discipline, Some Governance Anomalies, and Daughter's Growing Prominence

During the second quarter of 2025, North Korea remained politically stable despite state media's stepped-up rhetoric on Party ideology and discipline, an unusual public profile afforded to Kim's top aide Choe Ryong Hae, and parliamentary elections that are overdue by more than a year. Kim's daughter effectively made her diplomatic debut by accompanying him to the Russian Embassy to celebrate Russia's Victory Day, which is consistent with her growing public prominence.

## Stepping Up Party Discipline

In late May, Kim Jong Un censured the failed launch of a destroyer at Chongjin Shipyard, characterizing it as “a serious accident and criminal act caused by sheer carelessness, irresponsibility and unscientific empiricism which should never occur and could not be tolerated.”<sup>1</sup> Kim attributed this accident to a lack of discipline rather than technical issues.

### *Context and Implications*

Kim highlighting discipline as the major issue in the failed ship launch is consistent with North Korea's tendency to attribute problems to external factors such as economic sanctions or infectious disease, or negligence, ideological laxity, and officials' incompetence. North Korea has shown a greater degree of transparency by infusing a touch of reality into propaganda since Kim Jong Un came to power, with Kim himself openly acknowledging failures and expressing emotions.

Ideology and discipline are staple topics in North Korean propaganda, but it has been reinforcing these two themes since the Party Secretariat meeting in late January<sup>2</sup>. The meeting was convened in response to a “serious incident involving reckless violations of party discipline, negative privileges and special treatment, and grave infringements on the dignity and rights of the people” in Jagang Province. Kim Jong Un strongly condemned the case as an “absolutely unforgivable super-large criminal act.” His criticism of the failed ship launch pointed in the same direction. The regime's longevity depends on

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<sup>1</sup> “새로 건조한 구축함진수식 진행 [Launch Ceremony Held for a Newly Built Destroyer],” *Rodong Sinmun*, May 22, 2025.

<sup>2</sup> “조선로동당 중앙위원회 제8기 제30차 비서국 확대회의에 관한 보도 [Report on the 30th Enlarged Meeting of the Secretariat of the Eighth Workers Party of Korea Central Committee],” *Rodong Sinmun*, January 29, 2025.

unity under the supreme leader. North Korea, therefore, will likely reinforce discipline further in light of two major upcoming Party events: the 80th Party founding anniversary on October 10 this year, and the Ninth Party Congress scheduled for next year.

## Choe Ryong Hae's Unusual "Guidance" vs Kim Jong Un's Increased Authority

On June 8, North Korean state media reported that Choe Ryong Hae, president of the Supreme People's Assembly (SPA) Presidium, visited economic development sites and "guided [chido; 지도]" their work, marking the first such reference to Choe's public activity.<sup>3</sup>

### *Context and Implications*

In principle, only the North Korean supreme leader conducts on-site "guidance," while non-Kim officials give on-site "inspections [ryohae; 료해]." Although state media in 2020 reported on high-ranking officials' rare on-site "guidance," the reappearance of this term in connection with Choe, Kim's close aide, is notable given Kim's increased authority this year.<sup>4</sup> For example, from 2020, Kim Jong Un occasionally "presided over" Party meetings, which was a departure from past practice of "guiding" them. In recent months, however, Kim has returned to "guiding" such meetings. In parallel, state media have significantly scaled back on Kim Il Sung and Kim Jong Il propaganda, as seen in their subdued treatment of the late leaders' birth anniversaries. For instance, in February, Kim Jong Un visited the Kumsusan Palace of the Sun for the first time in four years to mark his father's birthday. However, for the third consecutive year, he did not pay respects at the Palace to mark his grandfather's birthday in April.

## Overdue Legislative Elections

As of July 2025, North Korea has yet to hold its next SPA elections, which should have been held in March 2024. The North last held its quinquennial parliamentary elections in March 2019 and convened the opening session of the 14th SPA the following month. The North Korean constitution stipulates a five-year term for SPA deputies and provides that their terms may be extended until the elections should "unavoidable circumstances" prevent them from proceeding as scheduled. Although the elections are more than a year overdue, North Korea has not offered an explanation on what these "unavoidable circumstances" may be.

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<sup>3</sup>"최고인민회의 상임위원회 위원장 황해남도의 여러 부문 사업을 현지에서 지도 [SPA Presidium President Gives On-Site Guidance of Various Sectors' Work in South Hwanghae Province]," *Rodong Sinmun*, June 8, 2025.

<sup>4</sup>"리병철부위원장 장연군의 협동농장들에서 태풍피해복구사업을 지도 [Vice Chairman Ri Pyong Chol Guides Typhoon Damage Recovery Work at Cooperative Farms in Jangyon County]," *Rodong Sinmun*, September 1, 2020; "박봉주부위원장 장연군의 여러 농장에서 태풍피해복구사업을 지도 [Vice Chairman Pak Pong Ju Guides Typhoon Damage Recovery Work at Various Farms in Jangyon County]," *Rodong Sinmun*, September 1, 2020; "조선로동당 중앙위원회 부위원장들 황해남도 여러 농장의 피해복구사업을 현지에서 지도 [Workers Party of Korea Central Committee Vice Chairmen Give On-the-Spot Guidance on Damage Recovery Work at Various Farms in South Hwanghae Province]," *Rodong Sinmun*, September 1, 2020.

### *Context and Implications*

This is a notable anomaly for two reasons. First, significant delays of SPA elections are extremely rare. Moreover, this is the first time North Korea has failed to hold SPA elections as scheduled under Kim Jong Un. Second, this significantly delayed election is starkly out of character for Kim Jong Un, who has institutionalized decision-making processes in the Party and the SPA since the outset of his reign. For example, Kim revived Party meetings, including Party Congresses, that remained defunct under his father. It is also worth noting that nearly two years have passed since North Korea made significant revisions to its electoral law in August 2023.<sup>5</sup>

## Kim's Daughter and Next-Generation Education

In May, Kim Jong Un's daughter accompanied Kim to the Russian Embassy to celebrate Russia's Victory Day, effectively making her diplomatic debut and marking another milestone in her rising public profile.<sup>6</sup> As the daughter's prominence grew, the profile of Kim's wife, Ri Sol Ju, has decreased significantly, both in terms of the frequency of her public appearances and her physical distance from Kim Jong Un in public settings. One example is the recent opening of the Wonsan-Kalma Coastal Tourist Area, where Ri was repeatedly shown walking behind Kim and the daughter on state-run television.<sup>7</sup>

### *Context and Implications*

The rising public profile of Kim's daughter appears to be connected to Kim Jong Un's increasing emphasis on next-generation education. In March, for example, North Korea held its first-ever "National Grand Short Course of Korean Children's Union Instructors."<sup>8</sup> Kim Jong Un reportedly gave detailed instructions leading up to the seminar's organization.<sup>9</sup> Furthermore, in January, Kim received a visiting performing arts troupe of pro-North Korean students residing in Japan.<sup>10</sup> This appeared to reflect both the importance he attaches to the General Association of Korean Residents in Japan (GAKRJ; Chongryon) and his interest in youth education.

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<sup>5</sup> "조선민주주의인민공화국 최고인민회의 상임위원회 제14기 제27차전원회의 진행 [27th Plenary Meeting of the 14th DPRK Supreme People's Assembly Presidium Held]," *Rodong Sinmun*, August 31, 2023; "수정보충된 각급 인민회의의 대의원선거법에 대하여 (1) [On Amended and Supplemented Law on the Election of Deputies to People's Assemblies at Various Levels (Part 1)]," *Minju Joson*, October 18, 2023.

<sup>6</sup> "경애하는 김정은동지께서 로씨야의 위대한 전승절에 즈음하여 우리 나라 주재 로씨야련방대사관을 축하방문하시였다 [Respected and Beloved Comrade Kim Jong Un Paid a Congratulatory Visit to the Russian Federation Embassy in Our Country on the Occasion of Russia's Great Victory Day]," *Rodong Sinmun*, May 10, 2025.

<sup>7</sup> "사회주의문명개화의 새 경관을 펼친 동해기슭의 관광명소, 원산갈마해안관광지구 준공식 성대히 진행 [Completion Ceremony of the Wonsan-Kalma Coastal Tourist Area, a Tourist Attraction on the East Sea Coast That Has Unfolded a New Landscape of Socialist Civilization's Blossoming, Grandly Held]," Korean Central Television, June 26, 2025.

<sup>8</sup> "새시대 소년혁명가, 소년애국자육성에서 근본적인 전환을 안아오자 -전국학교소년단지도원대강습 진행 [Let Us Bring About a Fundamental Change in Raising Young Revolutionaries and Young Patriots for a New Era - National Grand Short Course of Korean Children's Union Instructors Held]," *Rodong Sinmun*, March 31, 2025.

<sup>9</sup> Ibid.

<sup>10</sup> "경애하는 김정은동지께서 재일조선학생소년예술단 성원들을 만나주시였다 [Respected and Beloved Comrade Kim Jong Un Met With Members of the Korean Students and Youths Art Troupe in Japan]," *Rodong Sinmun*, January 3, 2025.

## Leadership

Michael Madden

# North Korea Reiterates Party's Precedence Over the Military, Conducts Sweeping Changes in KPA Leadership

During the second quarter of 2025, the Workers' Party of Korea (WPK) Central Military Commission (CMC) carried out two important activities: an investigation into a failed ship launch, and convening of a CMC expanded meeting. The former offers greater insight into the CMC's administrative processes and shows its exercise of authority over the country's defense industry. The expanded meeting was significant for two reasons: Kim Jong Un (KJU) reaffirmed the Party's precedence over the Korean People's Army (KPA), and he conducted sweeping changes in the KPA leadership ahead of the Ninth Party Congress scheduled for 2026.

## CMC Investigation Sheds Light on Its Administrative Processes

The CMC led an investigation into the May 21 capsizing of a KPA naval destroyer during a commissioning ceremony at Chongjin Port.<sup>1</sup> In the process, CMC investigators referred three defense industry, shipbuilding, and port officials—the port's chief engineer, the hull construction workshop's head, and the deputy manager for administrative affairs—to “the law-enforcement organ.”

### *Context and Implications*

The CMC's leadership role in the failed ship launch investigation is altogether unsurprising. It has administrative and policy oversight over the DPRK's defense industry, in addition to basic decision-making on defense affairs. The “law-enforcement organ” that detained the three individuals may refer to the Ministry of Public Security (MPS), North Korea's police, or the Central Prosecutor's Office (CPO). It is unclear if a formal statutory connection exists between the CMC and CPO or if the case referrals were a one-off enforcement measure.

These disclosures provide us with greater insight into the CMC's administrative processes. The MPS and/or CPO referrals show the CMC's interaction with a North Korean institution outside of the KPA. The CMC's investigation also shows that the CMC exercises its authority over the defense industry. Overall, the latest investigation provides us with a deeper understanding of how the Kim regime engages in problem-solving and the bureaucratic mechanisms it employs.

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<sup>1</sup> “Investigation into Destroyer Launch Accident Intensified,” *KCNA*, May 23, 2025, <http://kcna.kp/en/article/q/a6981124e6d4bac2a1824e9ec3468c3c.kcmsf>; and “Accident Investigation Group Informs WPK Central Military Commission of its Work,” *KCNA*, May 25, 2025, <http://kcna.kp/en/article/q/64e900f5bd0353837ca02d7babce3ad5f-bec640da0fe3231761bf5f9776d335a71110c246820e75b27f0800d3bfeaf6.kcmsf>.

## Kim Reaffirms Party's Precedence Over the Military, Conducts Sweeping Personnel Changes in KPA

The CMC gathered in an expanded session on May 28.<sup>2</sup> There were no publicized mentions of the failed ship launch or additional large rear-area troop deployments to Russia. In fact, state media's brief report of the meeting indicated that civil-military relations between the WPK and the KPA, or the roles of the WPK committees and the KPA's political commissars, were the main topics discussed. It said: "The meeting discussed the important issues of exercising tight control and guidance so that all military and political activities of the DPRK armed forces are thoroughly conducted as required by the Party's military line...." KJU himself emphasized the importance of "realizing the guidance of the Party Central Committee over the army" in that same meeting.

Although the tone of KJU's remarks was neutral and aspirational rather than scolding, the CMC demoted the military rank of KPA General Political Bureau (GPB) Director Jong Kyong Thaek.<sup>3</sup> Additionally, the CMC made at least 10 personnel changes in the military, but state media did not reveal the new officeholders' names. These included six corps commanders, the KPA Artillery Bureau commander, and the Military Security Command (MSC) director. The CMC also "dispatched some" political commissars, with at least 10 (possibly more) general-grade officers changing positions after the CMC meeting. State media's report of the CMC meeting did not reveal the names of outgoing officers' names or those of the new office holders, but the only known personnel change was General Jo Kyong Chol's exit from the MSC director position.



*General Jo Kyong Chol (left) and then-four-star General Jong Kyong Thaek in February 2025. (KCNA)*

### Context and Implications

<sup>2</sup> "Eighth Enlarged Meeting of WPK Central Military Commission Held," *KCNA*, May 30, 2025, <http://kcna.kp/en/article/q/24ebb6eaf8c8a6c6e96c54e72ba79e04.kcmsf>.

<sup>3</sup> This was not reported by North Korean media but confirmed by photos showing Jong's uniform with a three-star insignia the day after the CMC meeting. See Kim Soo-yeon, "(2nd LD) N. Korea's Kim demotes director of military's general political bureau," *Yonhap*, May 30, 2025, <https://en.yna.co.kr/view/AEN20250530000752315>.



The Party-military relationship has previously been an agenda item at things like CMC and Political Bureau meetings. The latest session's emphasis of the Party's control of the military not only is consistent with Kim Jong Un's longstanding policy of WPK precedence over the KPA, but also echoes a theme highlighted at the 2024 year-end Party plenary meeting: bolstering ideology in the KPA.<sup>4</sup>

Jong's demotion from four-star General to three-star Colonel General is the lowest rank of an incumbent GPB director since the 1970s. The GPB manages the Party's relationship with the military primarily through a network of political commissars and officers deployed to KPA units. During a pair of inspections at North Korean military colleges in February, Jong's presence was not explicitly reported in state media. He was upstaged by Pak Jong Chon, director of the WPK Department of Political Leadership of the Military, and Minister of National Defense (MND) No Kwang Chol.<sup>5</sup> Due his family background, previous career experience as a key political enforcer and his stable patronage ties, Jong Kyong Thaek is not someone who would be out of office *per se*, but he probably has to prove himself to keep his current post.

The CMC's multiple personnel changes mark a significant churn in KPA leadership. Jo's departure from the MSC marks the most notable change of them all. He is a core member of Kim's bodyguard and has built up the MSC's organization and jurisdiction. Appointed in 2009, Jo had been in office for 16 years. This makes him the second-longest serving KPA official in DPRK history, after O Jin U's 19 years as defense minister.

Since the Party Secretariat meeting at the end of January, when Kim harshly criticized violations of Party discipline by local party officials, Kim Jong Un seems to be using this final year before the Ninth Party Congress in 2026 to undertake personnel changes.<sup>6</sup> This will almost certainly ease personnel selections prior to the Party Congress, where North Korea typically conducts sweeping personnel shuffles. We might get further insight into some of these new commanders at forthcoming events. The next opportunity most likely will come in October, when North Korea is expected to stage a military parade marking the Party's 80th founding anniversary.

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<sup>4</sup> "Report on Enlarged Meeting of Eleventh Plenary Meeting of Eighth Central Committee of WPK," *KCNA*, December 29, 2024, <http://kcna.kp/en/article/q/13e43e68ae1cbc62540eddbad5f92205.kcmsf>.

<sup>5</sup> "Respected Comrade Kim Jong Un Visits Kim Il Sung University of Politics," *KCNA*, February 25, 2025, <http://www.kcna.kp/en/article/q/eaf19564e69980427dde571f33565f65.kcmsf>; "Respected Comrade Kim Jong Un Inspects Kang Kon Military Academy," *KCNA*, February 26, 2025, <http://www.kcna.kp/en/article/q/60652a2eb618df9fb5b85e811df030b2.kcmsf>; and "Comrade Kim Jong Un Visits Kim Il Sung University of Political Science," Korean Central Television, February 26, 2025.

<sup>6</sup> "Report on 30th Enlarged Meeting of Secretariat of Eighth Central Committee of WPK," *KCNA*, January 29, 2025, <http://www.kcna.kp/en/article/q/b7d040edf71f8cac912719455bbb18d9.kcmsf>.

## Economy

Mitsuhiro Mimura

# June Party Plenum Confirms Economic Modernization Rather than Drastic Development, Construction Projects Bear Fruit, and Economic Ties With Russia and Belarus Stepped Up

During the second quarter, North Korea held a Party plenary meeting, made more headway with construction projects, and continued to deepen economic ties with Russia. The North Korean Workers' Party of Korea's (WPK) plenary meeting in June reaffirmed that the revitalization and modernization of industry, rather than extensive economic development, remain the core of North Korea's economic policy, and that the WPK continues to employ a bottom-up approach by gathering each sector's opinions. One major economic achievement during the second quarter was the opening of the long-awaited Wonsan-Kalma Coastal Tourist Area. Construction projects are relatively low cost for North Korea, as it can locally produce the major raw materials and mobilize the military personnel needed for construction. North Korea continued to deepen economic ties with Russia by establishing transport infrastructure and stepping up educational cooperation; as well as with Belarus by holding an inter-governmental economic and trade meeting.

## June Party Plenary Meeting

The Enlarged Meeting of the 12th Plenary Meeting of the Eighth Central Committee of the WPK was held from June 21 to 23. The plenary meeting reviewed the implementation of key Party and state policies, presented at the Party plenary meeting in December 2024, in the first half of this year. The meeting approved a decision to convene the Ninth Party Congress, although reporting did not give a specific target date. It also discussed and decided on the issues of “radically accelerating the revitalization and modernization of major industrial sectors of the national economy.” “Sector-specific study and consultative meetings” were held for carrying out the Party-set plans for the second half of the year. As in 2024, state media did not provide much detail on any key industry's production outcomes for the first half of the year.

## *Context and Implications*

The plenary meeting reaffirmed that industrial revitalization, rather than extensive economic development, remains the core of North Korea's economic policy, which is consistent with the goal presented at the Eighth Party Congress.<sup>1</sup> Although state media withheld details, the meeting also confirmed that the WPK continues to gather opinions from the grassroots level, at least to a certain extent, by holding

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<sup>1</sup> Kim Yong Il, “당중앙위원회 제8기 제12차전원회의 기본정신 [Basic Spirit of the 12th Plenary Meeting of the Eighth Party Central Committee],” *Rodong Sinmun*, June 28, 2025.

sector-specific study and consultative meetings. The emphasis on this bottom-up approach is one of the distinguishing characteristics of North Korea under Kim Jong Un, and the North has consistently implemented this practice even during the pandemic.

## National Economic Projects Bear Fruit

During the second quarter of 2025, North Korea continued to step up economic projects, some of which have started to bear results, according to state media. For example, garment factories built as part of the “20×10 policy for regional development” —launched by Kim Jong Un in January 2024 with the aim of establishing local industrial plants in 20 cities and counties over the next 10 years—have started manufacturing clothes, some of which were exhibited at the “2025 Spring Garment Exhibition” in April.<sup>2</sup> Furthermore, Kim Jong Un attended ceremonies to mark the completion of the third stage of a project to build 10,000 homes in Hwasong District in Pyongyang (April 15) and the Wonsan-Kalma Coastal Tourist Area (June 24), underscoring the importance he attached to these two initiatives.

At the inaugural ceremony of the Wonsan-Kalma Coastal Tourist Area, Kim said the Area’s development was a “proud first step” toward implementing the Party and government’s policy on cultural tourism development, and that the Ninth Party Congress will present “an important plan for developing large promising tourist resorts of various types in different regions in the shortest time possible” based on the lessons learned from the development of the Kalma Peninsula.

### *Context and Implications*

Improving the people’s livelihoods is one of Kim Jong Un’s long-standing commitments, and given the country’s limited economic resources, the regime seems to have come up with a workaround that would enable Kim to deliver his pledge at a relatively low cost: construction projects. North Korea has emphasized construction because it can source the necessary raw materials and manpower domestically: the primary raw materials for construction, reinforcing bars and cement, are domestically produced, and manpower comes from the Korean People’s Army (KPA). The construction of the Wonsan-Kalma Coastal Tourist Area began in 2018, but the project was delayed multiple times, first due to Kim’s redirections on architecture and aesthetics and then allegedly due to constraints procuring interior furnishings and fixtures.

## DPRK Continues to Step Up Economic Ties With Like-Minded Countries

In addition to continuing high-level and people-to-people exchanges, North Korea and Russia have stepped up efforts to establish the necessary transport infrastructure to facilitate such exchanges. On April 30, 2025, a groundbreaking ceremony was held at a road bridge connecting Russia’s Far East and the DPRK.<sup>3</sup> North Korea followed up with an inaugural ceremony at the

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<sup>2</sup>“《봄철피복전시회-2025》 개막 [“2025 Spring Garment Exhibition” Opens],” *Rodong Sinmun*, April 12, 2025.

<sup>3</sup>“Чекунков рассказал о перспективах строительства моста между Россией и КНДР [Chekunkov Spoke About the Prospects for Building a Bridge Between Russia and the DPRK],” *RIA Novosti*, April 30, 2025, <https://ria.ru/20250430/most-2014399883.html>.

Kalma Railway Station in Wonsan, Kangwon Province on June 11. This event was held in the lead-up to the opening of the Wonsan-Kalma Coastal Tourist Area, which has since hosted at least a group of Russian tourists before abruptly banning foreigners' entry to the resort.

In May, the First Forum of Rectors of the Russian Federation and the DPRK was held at Far Eastern Federal University (FEFU), bringing together leaders from 30 Russian and 10 North Korean universities.<sup>4</sup> The number of North Korean students in Russia stands at nearly 180 this academic year, and Russia has doubled their quota for the 2026 academic year.<sup>5</sup> Additionally, Russian Ambassador to North Korea, Alexander Matsegora, said Russian has once again become the primary foreign language in North Korean schools, creating an urgent need to train more Russian language teachers.<sup>6</sup>

A delegation of the Belarusian government, led by Deputy Prime Minister Yuri Shuleiko, visited Pyongyang May 6 to 9 to participate in the third meeting of the DPRK-Belarus intergovernmental joint committee for trade and economic cooperation and sign a protocol. North Korean media did not provide details of the protocol.

### *Context and Implications*

Over the past year, Russia has been North Korea's closest partner, followed by China. However, most of the trade between North Korea and Russia to date seems to have been limited to the military sector, and according to Russian statistics, fewer than 1,000 Russian tourists visited North Korea in 2024.<sup>7</sup> This number pales in comparison to the 2005-2007 period, when Mount Kumgang tourism was at its peak and 240,000 to 350,000 South Korean tourists were visiting North Korea per year.<sup>8</sup> More importantly, North Korea's efforts to step up educational cooperation with Russia -- which it had deprioritized following the Soviet Union's collapse -- will be important for deepening economic ties with Moscow and the Eurasian Economic Union (EEU).

It remains unclear whether North Korea still aims to normalize relations with the United States through a short- to medium-term "deal," although there are few positive signals in that direction. More likely, if North Korea expects its hostile relationship with the United States to continue, it will prioritize cultivating economic relations with "friendly nations." In this context, deep economic cooperation with Russia is crucial.

North Korea-Belarus trade has been limited so far. However, Belarus is part of the Union State with Russia and a founding member of the EEU. On December 25, 2023, Iran signed a free trade agreement

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<sup>4</sup> "Руководители вузов КНДР и России договорились о сотрудничестве [Heads of DPRK and Russian Universities Agree on Cooperation]," *RIA Novosti*, May 21, 2025, <https://ria.ru/20250521/kndr-2018166248.html>.

<sup>5</sup> "Россия вдвое увеличила квоту бюджетных мест для граждан КНДР [Russia Doubles Quota of Budget Places for DPRK Citizens]," *RIA Novosti*, May 21, 2025, <https://ria.ru/20250521/rossija-2018160695.html>.

<sup>6</sup> "Посол РФ рассказал об олимпиаде по русскому языку в КНДР [Russian Ambassador Talks About Russian Language Olympiad in DPRK]," *Izvestiya*, May 20, 2025, <https://iz.ru/1889024/2025-05-20/posol-rf-rasskazal-ob-olimpiade-po-russkomu-azyku-v-kndr>.

<sup>7</sup> Youngnam Kim, "Russian tourist visits to North Korea fall short of expectations despite post-pandemic reopening," *The Korea Daily*, February 7, 2025, <https://www.koreadailyus.com/russian-tourist-visits-to-north-korea-fall-short-of-expectations-despite-post-pandemic-reopening/>.

<sup>8</sup> "북한 지식사전 (2021): 금강산관광지구 [North Korea Knowledge Dictionary (2021): Mt. Kumgang Tourist Area]," South Korean Ministry of Unification website, [https://nkinfo.unikorea.go.kr/nkp/knwldg/view/knwldg.do?knwldgNo=150&menuId=NK\\_KNWLDG\\_DICARY](https://nkinfo.unikorea.go.kr/nkp/knwldg/view/knwldg.do?knwldgNo=150&menuId=NK_KNWLDG_DICARY).

with the EEU, and on December 26, 2024, it became an observer state. North Korea's future external economic policies will show whether it will follow Iran's path or strengthen relations with Pacific Rim countries. Also of note are Kazakhstan, Armenia, and Kyrgyzstan, which are also members of the EEU. How North Korea plans to develop ties with these three countries, which maintain friendly relations with Western nations, is worth watching closely.



## Missiles and Weapons of Mass Destruction (WMD)

Vann H. Van Diepen

### North Korea Continues to Improve Nuclear Posture

Activities during the second quarter were dominated by steps to improve nuclear posture. These include a probable expansion of fissile material production for nuclear warheads; possible increased capacity to build rocket engines for strategic missiles that carry such warheads; the unveiling of new launch platforms for nuclear missiles; and proficiency training for nuclear missile launch units and command-and-control.

### Probable New Uranium Enrichment Building

On June 9, the International Atomic Energy Agency (IAEA) reported that “the Agency is monitoring the construction of a new building at Yongbyon which has dimensions and features similar to the Kangson enrichment plant.” Analysis of commercial imagery by the James Martin Center for Nonproliferation Studies (CNS), the Institute for Science and International Security (ISIS), and 38 North has probably identified the building. Construction began in December 2024 and it appeared externally complete by May 26, 2025. All three sets of analysts agree the new building resembles the assessed enrichment building at Kangson and that its layout is suitable for a centrifuge facility, but that function has yet to be confirmed.

#### *Context and Implications*

In December 2022, Kim Jong Un called for “an exponential increase of the country’s nuclear arsenal” in the context of “the importance and necessity of a mass-producing of tactical nuclear weapons.” If the new building is for enrichment, it would be the second known expansion of assessed enrichment facilities since Kim’s speech (after one at Kangson), not including a Yongbyon expansion completed in May 2022. CNS estimate the existing facilities at Yongbyon and Kangson are capable of producing some 215-232 kg of highly enriched uranium (HEU) per year, enough for at least eight-to-nine all-HEU nuclear weapons. According to CNS, the new Yongbyon facility could add another 73-98 kg of HEU per year, enough for and at least three-to-four such weapons. It is quite possible that additional, as-yet undiscovered enrichment facilities also exist that might have been expanded over time.

### Expansion at Assessed Liquid-Propellant Rocket Engine Plant

The Thaesong Machine Factory near Pyongyang is assessed to produce liquid-propellant rocket engines and perform the final assembly (production) of liquid-propellant intermediate-range and intercontinental ballistic missiles (IRBMs and ICBMs) and space-launch vehicles (SLVs). Expansion of the rocket engine production facility there began in July 2024, but halted in December. It was reported in April 2025 that the expansion work had resumed in mid-March, and now includes another cluster of buildings.

### *Context and Implications*

The purpose of the construction remains unclear, but it might be for future series production of an upgraded SLV engine using liquid oxygen that North Korea launched unsuccessfully in May 2024, or expanded production of engines for liquid ballistic missiles. The North probably remains committed to liquids in addition to its growing solid-propellant strategic missile force, not only because of its substantial sunk investment in liquid systems but because liquid propellants pound-for-pound have more energy, permitting heavier payloads to be carried to a given range.

## New Destroyers Carry Nuclear-Capable Missiles

On April 25, North Korea launched the Choe Hyon, the first of a new class of “multi-mission destroyers.” According to Kim Jong Un, the ship will carry “anti-air, anti-ship, anti-submarine and anti-ballistic missile capability” as well as “weapon systems for the most effective ground striking operations, like hypersonic strategic cruise missile, tactical ballistic missile and other means of strike.” (A sister ship, the Kang Kon, was relaunched on June 12 after a failed launch attempt on May 21 and a hurried effort to right, refloat, and restore it. Kim said the North will build two destroyers per year.) North Korean photos of the ship, and of a test of its weapons on April 28-29, indicate the destroyer is intended to carry 10 KN-23/Hwasong-11S short-range ballistic missile (SRBMs) in large vertical launch tubes aft, and some eight Hwasal land-attack cruise missiles (LACMs), probably in a slanted superstructure amidships. It also will carry some of the new “hypersonic strategic cruise missile” (also called a “supersonic cruise missile”) seen for the first time in photos of the test, probably fired from one of the eight medium-sized vertical launch tubes mounted aft.

### *Context and Implications*

All of these missiles are capable of carrying nuclear or conventional warheads. Arming the new destroyers with nuclear-capable missiles carries forward the “policy of expanding the tactical nuclear weapons operation” and of making the navy “a component of the state nuclear deterrence” announced by Kim in August 2023. It is also consistent with earlier launches of LACMs from the smaller Amnok-class corvette in August 2023. Deploying nuclear missiles on surface combatants diversifies North Korean nuclear basing and further complicates Alliance targeting of the North’s nuclear force, adding to overall nuclear force survivability. Based on the photos, the new cruise missile is almost certainly not “hypersonic” (i.e., capable of Mach 5+ speed), and its speed and other aspects of performance cannot be confirmed.

## Tactical Nuclear Counterattack Drill Held

On May 8, North Korea conducted SRBM launches in what its media termed a “joint striking drill” using the “national combined nuclear weapons management system” that it called “Haekpangasoe” (“Nuclear Trigger”). Based on North Korean photos of the event and South Korean military reporting, some five to eight KN-25s were launched and at least one KN-23/Hwasong-11A. This was the first detected KN-23 launch in North Korea since April 2023.

### *Context and Implications*

The North first announced a “combined tactical drill simulating a nuclear counterattack by the units for the operation of tactical nukes” and involving the “nuclear weapons management system” in March 2023. The 2025 iteration allows Pyongyang to underscore the credibility of its retaliatory capability, both in terms of weapons and command-and-control, as well as its “tactical nuke” threat against South Korea. While Russian launches of North Korean-made KN-23s against Ukraine provide plenty of opportunities for the North to assess the capability and reliability of the missile system, it does not exercise Pyongyang’s own launch units and support infrastructure. Occasional launches by North Korean KN-23 units are the best way to maintain operational readiness.

# North Korea Continues to Modulate Anti-US Rhetoric and Strengthen Ties with Russia; Indicates Lack of Interest in Improving Ties with South Korea

In the second quarter, North Korea continued to moderate its anti-US rhetoric, suggesting it is leaving some maneuvering space for diplomacy with the Trump administration for when the time is right. However, creating diplomatic space is not the same as being receptive to US demands. North Korea's pledge at the end of 2024 to launch "the toughest anti-U.S. counteraction," Kim's commitment to expanding nuclear capabilities, and the North's ongoing mistrust of Washington will continue to pose significant challenges. North Korea continued to expand and deepen ties with Russia and will likely prioritize this bilateral relationship at least for the foreseeable future. North Korea's subdued and limited coverage of South Korean internal affairs, coupled with its ongoing criticism of Seoul in regional security contexts, indicates Pyongyang remains uninterested in improving relations with the new South Korean government despite the latter's conciliatory measures.

## United States

North Korea continued to modulate its anti-US rhetoric in the second quarter, a trend that began as early as December 2024. Despite its steady stream of news reports and articles critical of the United States, North Korea's official statements, generally considered more authoritative, by and large maintained a punch line that has become a consistent and prevalent theme in North Korean propaganda: that the country would continue to step up its nuclear capabilities to face US "threats."<sup>1</sup> Kim Jong Un refrained from using derogatory terms such as "the US imperialists," even while accusing the United States of endangering North Korea's national security and pledging to respond to provocations in kind.<sup>2</sup>

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<sup>1</sup> For example, Kim Yo Jong said, "... [I] t will only give unlimited justness and justification to the advance of the DPRK aspiring after the building of the strongest nuclear force for self-defence. The DPRK will make steady responsible efforts to thoroughly defend the supreme interests of the state and ensure regional peace and stability, given that the U.S. has gone to extremes in its nuclear threat and its nuclear alliance is getting desperate in its confrontational moves as days go by." See "Press Statement of Kim Yo Jong, Vice Department Director of C.C., WPK," *Korean Central News Agency* (KCNA), April 9, 2025, <http://kcna.kp/en/article/q/79006337b832c7f7308b-2c04f733b1eb.kcmsf>. The North Korean Defense Ministry said, "We ... are making sustained and practical efforts to possess a war deterrent capable of actively coping with any security instability resulting from its [US] nuclear arms buildup. The DPRK armed forces will thoroughly contain and control all sorts of military threats from the enemy countries in the future, too..." See "Press Statement by Chief of Policy Office of DPRK Ministry of National Defence," *KCNA*, May 25, 2025, <http://kcna.kp/en/article/q/7814962e12328ec63931b157c5b3d5ceead166184a3dc-cadcf9a25986ed6d4a8849dcbab0a7b04376b9c3fd971bede61.kcmsf>.

<sup>2</sup> "Respected Comrade Kim Jong Un's Speech at Ceremony of Launching Destroyer of Navy of Korean People's Army," *KCNA*, April 26, 2025, <http://www.kcna.kp/en/article/q/aaeed682a4cba15d70ede85a48bf38a1.kcmsf>; and "Respected Comrade Kim Jong Un Makes Speech at Ceremony of Launching Destroyer of Navy of Korean People's Army," *KCNA*, June 13, 2025, <http://www.kcna.kp/en/article/q/9e8aba4f8c82a15d3f892d0b5389ae03.kcmsf>.

Furthermore, although North Korean state media criticized the “Trump administration,” they avoided criticizing Trump himself by name, instead opting to use the term “the ruler [집권자; chipkwonja].”<sup>3</sup> Similarly, North Korea omitted any direct reference to the United States in connection with its operations in the Kursk region and issued meek criticism of US bombings of Iranian nuclear sites. More recently, North Korea’s subdued anti-US rhetoric marking the start of the Korean War—as shown by its front-page “article [글; article]” and the scale of its anti-US rallies—also pointed to the same trend.<sup>4</sup>

### *Context and Implications*

This ongoing trend suggests that North Korea is leaving some maneuvering space for diplomacy with the Trump administration for when the time is right.<sup>5</sup> However, creating diplomatic space is not the same as being receptive to US demands. Despite the seemingly positive sign, the bilateral relationship remains severely challenged, even with Trump’s return to the White House. For one, at a year-end Party plenary meeting in 2024, Kim characterized the United States as “the most reactionary state” and called for “the toughest anti-U.S. counteraction to be launched aggressively by the DPRK for its long-term national interests and security.” A review of North Korean propaganda shows this policy has not changed despite its softened anti-Trump rhetoric. Second, North Korea has consistently reaffirmed, at the most authoritative levels including Kim Jong Un himself, that it will continue to bolster nuclear capabilities in accordance with its “nuclear weapons state” status as codified in its constitution in 2023. Another point of note is that Pyongyang has been closely tracking the Trump administration’s tensions with allies over tariffs and interest in acquiring or reclaiming foreign territory. In that vein, a prominent North Korean “international affairs analyst’s” assessment of Trump’s “America First” policy seemed to reinforce the North’s already deep mistrust of the United States. The analyst’s conclusion was that “one must be strong in order to defend oneself” and reiterated North Korea was doing just that by “bolstering up its strength with tighter grip on the treasured nuclear sword of justice.”

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<sup>3</sup> Ri Kyong Su, “서방식민주주의의 취약성을 폭로한다 [Exposing the Vulnerabilities of Western-style Democracy],” *Rodong Sinmun*, June 5, 2025.

<sup>4</sup> While the front-page “article” in the Party daily *Rodong Sinmun* on June 25, 2025 included a brief criticism of the United States, its main focus was the importance of bolstering “strength.” By contrast, the *Rodong Sinmun* editorial on June 25, 2024 used more detailed and stronger language in reference to US military activities in the region and the North Korean people’s will to retaliate. In 2024, North Korean media reported that “more than 100,000” people attended the June 25 anti-US rally in Pyongyang; this year, North Korea did not report on the number of attendees in the main rally held in Sinchon, suggesting a smaller rally. It should be noted, however, that Choe Tong Myong, secretary of the Workers Party of Korea, and “other senior Party and government officials” attended the Sinchon rally. For the 2025 article, see Rim Jong Ho, “<6.25가 다시금 새겨주는 철리> 강해지고 또 강해져야 한다 [The Lesson the Korean War Impresses Upon [Us] Once Again: [We] Must Become Stronger and Even Stronger],” *Rodong Sinmun*, June 25, 2025. For the 2024 editorial, see “1950년대 조국수호정신을 필승의 무기로 틀어쥐고 우리 국가의 존엄과 국익을 억척같이 수호하자 [Let Us Firmly Seize the 1950s Spirit of Safeguarding the Fatherland as an Invincible Weapon and Resolutely Safeguard the Dignity and National Interests of Our State],” *Rodong Sinmun*, June 25, 2024.

<sup>5</sup> Kim Yo Jong on July 29 issued a “press statement” indicating North Korea may be open to dialogue with the United States if it drops the demand for North Korea’s denuclearization. See “Press Statement of Kim Yo Jong, Vice Department Director of C.C., WPK,” *KCNA*, July 29, 2025, <http://www.kcna.kp/en/article/q/f09697cbd57fc-50ca8b79a88ccfd9309.kcmsf>.



## Russia

North Korea continued to strengthen relations with Russia at all levels and across various sectors, from student, news agency, and military delegations' visits to Russia and Russian ministerial and communist party delegations' visits to North Korea, to Kim Jong Un's back-to-back meetings in June with Sergei Shoigu, secretary of the Russian Security Council and Putin's close confidant.<sup>6</sup> North Korean media also gave prominent coverage to Russia's Victory Day and the first anniversary of the North Korea-Russia Treaty on Comprehensive Strategic Partnership. Two key events underlined the state of the bilateral relationship. First, in late April, North Korea for the first time publicly acknowledged troop deployment to Russia. It described the military operations in Kursk as demonstrating "the highest strategic level of the firm militant friendship between the DPRK and Russia and the alliance and fraternal relations."

Second, Kim gave a speech at the Russian Embassy to commemorate Russia's Victory Day, where he emphasized the North's "alliance" and "blood-sealed bilateral relationship" with Russia, justified his troop deployment, and declared he would "unhesitatingly issue an order on using the armed forces of the DPRK" should Russia come under another assault, in accordance with their treaty. Kim's visit to the Russian Embassy marked his third to a foreign embassy in Pyongyang, following his visits to the Cuban Embassy in 2016 to mourn Fidel Castro's death, and the Chinese Embassy in 2018 to express sympathy to the victims of a car crash in North Korea.

### *Context and Implications*

Kim Jong Un's repeated public affirmations of commitment to Russia, coupled with the North's continued attempts to institutionalize relations at all levels across various sectors, indicate that strengthening this bilateral relationship will remain a priority for Pyongyang. These moves are consistent with North Korea's efforts to give longer-term, strategic framing to its relations with Moscow, particularly since the signing of the new treaty during Putin's visit to Pyongyang in 2024. A visiting Russian Communist Party delegation's rare meeting in April with the director of the North Korean Party's International Department, whose main portfolio is China and overseeing party-to-party diplomacy, may be understood in the context of North Korea's effort to give an ideological foundation to the relationship.

How North Korea has been invoking the new treaty—and apparently coordinating policy with Moscow—is indicative of how it may use the document in the future. North Korea has stated that Kim's decision to send troops to Russia was based on Article 4 of the treaty.<sup>7</sup> The North Korean Foreign Ministry's statements on the Israel-Iran conflict in June, issued shortly after Kim's meeting with Shoigu, appeared to have been coordinated with the Russian position. Article 2 of the North Korea-Russia treaty stipulates

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<sup>6</sup> "Delegation of Russian Ministry of Interior Arrives Here," *KCNA*, May 27, 2025, <http://kcna.kp/en/article/q/65e-93d8a71e2fc200437c1459d7e15085bf7a4b27f4e49b1eff1105df563e67b680e40b40899891bbe75a7072e3285e7.kcmsf>; "Respected Comrade Kim Jong Un Meets Russian Minister of Culture and Enjoys Art Performances," *KCNA*, June 30, 2025, <http://kcna.kp/en/article/q/674c05ed022f5b3925c150b4d1305302.kcmsf>; "Respected Comrade Kim Jong Un Meets Secretary of Russian Security Council Sergei Shoigu," *KCNA*, June 5, 2025, <http://kcna.kp/en/article/q/d6956a1a327129692244c7170f890c54.kcmsf>; and "Respected Comrade Kim Jong Un Meets Secretary of Russian Security Council Sergei Shoigu," *KCNA*, June 18, 2025, <http://kcna.kp/en/article/q/641e7544737011ee8d71b8efa56e1859.kcmsf>.

<sup>7</sup> Article 4 of the treaty stipulates: "In case any one of the two sides is put in a state of war by an armed invasion from an individual state or several states, the other side shall provide military and other assistance with all means in its possession without delay in accordance with Article 51 of the UN Charter and the laws of the DPRK and the Russian Federation."

that the two sides “shall exchange views on the issues of bilateral relations and international issues of mutual concern through dialogue and negotiations” and “intensify concerted action and cooperation in the international arenas.”

## South Korea

In contrast to its sustained criticism of South Korea in regional security contexts, North Korea continued to show little interest in Seoul’s internal affairs. This was exemplified by a two-sentence report on South Korea’s June 3 snap election, without providing any commentary or background. This terse coverage stood in contrast to its meatier reporting of the 2017 snap election in South Korea, also held in the aftermath of a presidential impeachment.<sup>8</sup> North Korean media did not report or comment on South Korea’s new Lee government for more than 50 days since their single reporting on the June election.<sup>9</sup>

### *Context and Implications*

North Korea’s continued public indifference to South Korean internal affairs, coupled with its ongoing criticism of Seoul, indicates Pyongyang remains uninterested in improving relations with the new South Korean government despite the latter’s conciliatory measures, such as the suspension of loudspeakers at the demilitarized zone and broadcasts into North Korea.<sup>10</sup> North Korea’s subdued handling of the latest South Korean presidential election and the new Lee government is in line with its low-key media coverage of Yoon’s declaration of martial law in December 2024 and the political confusion that followed. North Korea since the martial law declaration has limited its media coverage of South Korean domestic affairs to news reports on key political milestones, all the while continuing criticism of South Korea for its security cooperation with the United States and Japan. This appears to be part of Kim Jong Un’s two Koreas policy, which he first announced in December 2023.<sup>11</sup> In October 2024, North Korea confirmed that its constitution defined South Korea as a “hostile state.”

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<sup>8</sup> “남조선에서 제19대 《대통령》선거 진행 [19th “Presidential” Election Held in South Korea],” *Rodong Sinmun*, May 11, 2017.

<sup>9</sup> Kim Yo Jong on July 28 issued a “press statement” on the Lee Jae Myung government, marking North Korea’s first commentary on the new South Korean government since it reported on Lee’s election. See “Press Statement of Kim Yo Jong, Vice Department Director of C.C., WPK,” *KCNA*, July 28, 2025, <http://www.kcna.kp/en/article/q/8c4b1d1e8a32e3c00798c9612ac1682d.kcmsf>.

<sup>10</sup> This would seem to be supported by Kim Yo Jong’s July 28 press statement rejecting Lee’s overtures and reaffirming Kim Jong Un’s two Koreas policy. She said: “... [T]here can be no change in our state’s understanding of the enemy and they can not turn back the hands of the clock of the history which has radically changed the character of the DPRK-ROK relations. We clarify once again the official stand that no matter what policy is adopted and whatever proposal is made in Seoul, we have no interest in it and there is neither the reason to meet nor the issue to be discussed with the ROK.”

<sup>11</sup> Since the announcement of this policy in December 2023, North Korea has ceased using “South Korea [남조선; namjoson],” replacing it with South Korea’s formal name, “한국 [hanguk]” or “대한민국 [taehanminguk],” or the “Republic of Korea,” in order to emphasize it as a separate country.

