

NORTH KOREA: BACK TO THE FUTURE IS NO SOLUTION

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Abstract

Recalling the 75th anniversary of the Korean War and its implications for global security, the paper contrasts the peaceful international relations within the EU with the reliance on military force in East Asia. Based on the comprehensive relationship between South Korea and the EU, security cooperation has increased also in terms of hardware (arms sales). It could be intensified to meet the challenges posed for securing supply chains and global trade policy. The paper addresses the geopolitical dynamics involving North Korea, Russia, and China, analysing the impact of these new strategic alliances and military cooperation that have emerged. While denuclearisation should remain the long-term goal, there is a need to rethink of traditional policies towards North Korea, considering technological advances, lessening of legal constraints, upending of the goal of unification by the North and the negative examples of powers having abandoned nuclear arms. 'Back to the Future' in applying traditional tools and instruments is no longer an option – neither for South Korea, nor the European Union. "Forward to the Past", learning from history but adapting those lessons to new realities rather than simply repeating old patterns, must be the new direction. To preserve some influence outside the US-China-Russia triangle and in recognition that there is only one security, the EU needs to strengthen its engagement in East Asia, based on its comprehensive security approach. This could include nominating an EU Special Representative for Northeast Asia to contribute to trust building, reopening of lines of communication and bring diplomacy back to prevent the flareup of another hot spot.

Keywords

Korean Peninsula, European Union, resilience, strategic cooperation, might-is-right.



Resumo

Recordando o 75.º aniversário da Guerra da Coreia e as suas implicações para a segurança global, o artigo contrasta as relações internacionais pacíficas no seio da UE com a dependência da força militar na Ásia Oriental. Com base nas relações abrangentes entre a Coreia do Sul e a UE, a cooperação em matéria de segurança tem vindo a aumentar também no que diz respeito ao equipamento militar (venda de armas). Esta cooperação poderia ser intensificada para responder aos desafios colocados pela segurança das cadeias de abastecimento e pela política comercial global. O artigo aborda a dinâmica geopolítica envolvendo a Coreia do Norte, a Rússia e a China, analisando o impacto destas novas alianças estratégicas e da cooperação militar que surgiram. Embora a desnuclearização deva continuar a ser o objetivo a longo prazo, é necessário repensar as políticas tradicionais em relação à Coreia do Norte, tendo em conta os avanços tecnológicos, a diminuição das restrições legais, a reviravolta no objetivo de unificação por parte do Norte e os exemplos negativos de potências que abandonaram as armas nucleares. «Regressar ao Futuro» na aplicação de ferramentas e instrumentos tradicionais já não é uma opção — nem para a Coreia do Sul, nem para a União Europeia. «Avançar para o Passado», aprendendo com a história mas adaptando essas lições às novas realidades, em vez de simplesmente repetir velhos padrões, deve ser a nova direção. Para preservar alguma influência fora do triângulo EUA-China-Rússia e reconhecendo que existe apenas uma segurança, a UE precisa de reforçar o seu envolvimento na Ásia Oriental, com base na sua abordagem abrangente em matéria de segurança. Isto poderia incluir a nomeação de um Representante Especial da UE para a Ásia Nordeste, a fim de contribuir para a construção de confiança, a reabertura de canais de comunicação e o regresso da diplomacia para evitar o surto de outro foco de tensão.

Palavras-chave

Península Coreana, União Europeia, resiliência, cooperação estratégica, «o poder faz a razão».

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Introduction

The 75th anniversary of the outbreak of the Korean War serves as a poignant reminder of the ongoing security tensions in East Asia. The Korean Peninsula remains entangled in unresolved conflict (Taiwan, South and East China Sea, India, Pakistan, Afghanistan...) and global security challenges, exacerbated by new strategic alliances in the region.

The coincidence of this anniversary of the Korean War and that of the Schuman Declaration highlights the contrast between the peaceful system of international relations within the EU, albeit not in the whole of Europe – Ukraine - and the mistrust and reliance on military force that persist in East Asia. South Korea is technically still at war with North Korea, as is Japan with Russia because of the Kurile Islands (Northern Territories).

For South Korea, this conflict at its doorstep, requires full attention. This needs a foreign policy building international cooperation to control and solve this internationalised conflict. At the same time, the country must shoulder international responsibility as a major economy and as a technology provider.

The EU's engagement in East Asia must evolve to address these complexities through innovative diplomacy, comprehensive security approaches, and updated policy strategies.

The main conclusion this paper will develop is that it is necessary for the EU to adapt its critical engagement strategy towards North Korea and embrace innovative diplomacy to maintain or build some influence in Northeast Asia. By fostering deeper partnerships with South Korea and Japan and addressing North Korea's nuclear threat through deterrence and dialogue, the EU can contribute to regional stability and uphold the principles of a rules-based international order.

Considerable Change of the Geopolitical Context

As a sort of Cold War and tensions have persisted in Asia since the end of the Great Pacific War, recognition and standing as a global political player is still measured according to military and political parameters. Economics is crucial but not enough to be counted in as one of the big players – geo-economics is just one part of geo-politics, the



arms race has persisted, not least because of China's heavy investment in building a blue water navy.

COVID 19 brought some change: the importance of supply and production chains came to the fore. The weaponisation of trade and in particular the most beautiful word in the vocabulary of President Trump, "tariffs", moved trade policy back not only into the limelight but also the stone age. This unravelling of past achievements, in particular the WTO which had been set up to de-politicise trade policy and provide stability and predictability, leads to unseen disturbances and welfare losses for all. Populists are not aware, that in the long run, there is no protection in protectionism.

Like the Korean War which internationalised with the intervention of UN-forces under US leadership, the Russian war of aggression in Ukraine demonstrates to everybody that there is only one security: South Korea joined the group of countries condemning the flagrant breach of the Charta of the United Nations by Russia and applies sanctions. It also started to backfill arms for Ukraine through sales of weapons to Poland and the US. South Korea also started to backfill arms for Ukraine through sales of weapons to Poland and the US. Thus, on the Ukrainian battlefields South Korean weapons meet North Korean soldiers and arms.

A continuation of past policies, more of the same, will neither preserve the status quo, which is not desirable anyhow, nor bring the problem closer to a solution. Thus, while denuclearisation remains the global long-term goal, it is unlikely that North Korea will give up its nuclear arsenal any time soon as it guarantees regime survival. The recent attack of Iran by Israel, supported by the US by attacks on Fordo, Natanz and Isfahan with "bunker buster" bombs (GBU-57 Massive Ordnance Penetrator - MOP) will harden this conviction: Ghaddafi in Libya, Hussein in Iraq and Ukraine renounced nuclear weapons and paid a heavy price. In short, "Back to the Future" would mean more tension and turmoil ahead.

And the winner is: North Korea

North Korea has improved its position in gaining more options: it has added Russia as a balancer to the rocky relationship with its long-time-only supporter, China. The 2024 Treaty on Comprehensive Strategic Partnership, signed by Putin and Kim Jong-un Un provides for "military and other assistance" in case of an armed attack. This amounts to an alliance and could turn what was often regarded as technicality or left-over from the Korean War – there is only an armistice between the two Koreas and no peace treaty - into a serious issue: According to Russian propaganda, Russia is under attack by NATO and must defend itself. Therefore, North Korea is providing assistance in sending troops and not only weapons. According to the same logic, North Korea could claim Russian support against South Korea with which it is technically still at war!

North Korean soldiers on European soil are a serious escalation and could involve an Asian state in a conflict with NATO, should Putin decide in the future to attack a NATO member. This alliance will embolden North Korea's Kim Jong-un as he finally gets out of the unilateral dependence on China and now has Russia as a hedging partner vis-à-vis China. At the same time and different from 2018, Kim Jong-un will also be less keen to



restart his bromance with Donald Trump; he also refuses the persistent overtures of President Lee Jae-myung to recalibrate the relationship after the hawkish President Yoon and open lines of bilateral communication.

While Russia attempted extending this trilateral China-Russia-North Korea to Iran, hostilities between Israel and Iran as well US attacks on Iran have devalued this extension. The other supporters of Russia, who rejected in 2022 condemning the aggression against Ukraine in the United Nations, namely Belarus, Eritrea and Syria, are no material support.

Most importantly in the UN context, the veto of Russia to reconduct the UN Panel of Experts e.g., the committee monitoring sanctions, takes off some pressure from the North, as the replacement, the **Multilateral Sanctions Monitoring Team (MSMT)**¹ carries less authority. The non-prolongation of the UN Panel, however, has NOT ended the sanctions which remain in place and therefore need to be implemented. The first report of the MSMT published on 29 May 2025, underscores this fact. It also calls for active diplomacy to restore the UN Panel – which grants more legitimacy – and invites the DPRK to engage diplomatically. The reporting focuses on the North Korea – Russia cooperation.²

Russia and North Korea are under heavy **sanctions**. In the case of North Korea, they have not realised the main goal, to stop the development of nuclear weapons and inter-ballistic missile systems. As a collateral damage, the North Korean people suffer from malnutrition, a miserable standard of living while the family dictatorship shields itself and its cronies from the effects of sanctions.

North Korea excels in making use of emerging technologies: cybercrime helps to fill the otherwise empty state pockets, facilitated using crypto currencies/bitcoins³ which are difficult to track. Chinese knowhow allows to maintain the Korean version of the Great Cyber Wall; Russian oil lubricates some industry and food deliveries prevent a large-scale famine. While the argument, without sanctions the situation would be worse holds some truth, a rethink of policies is necessary.

Geopolitically, all eyes are on Ukraine, Gaza, Taiwan, India-Pakistan, the South China Sea and the erratic policies of the Trump II administration. Trump's admiration for strong leaders, irrespective of their moral standards, opens even the perspective to tie in the old love affair and rekindle the Kim-Trump bromance, potentially with Putin as the Third Man. Old love does not rust, but the bromance Trump-Putin is deteriorating as the latter clearly plays the former. Recall the melt down between Donald Trump and Elon Musk!

President Trump will soon realise that the price for engaging with Kim Jun-un has gone up compared to seven years ago. Standing between Xi and Putin gives Kim re-assurance,

¹ Australia, Canada, France, Germany, Italy, Japan, the Netherlands, New Zealand, the Republic of Korea, the United Kingdom, United States of America

² US Department of State (2025). Joint Statement of the Multilateral Sanctions Monitoring Team (MSMT) on the First Report Covering DPRK-Russia Military Cooperation. 29 May 2025; at <https://www.state.gov/joint-statement-of-the-multilateral-sanctions-monitoring-team-msmt-on-the-first-report-covering-dprk-russia-military-cooperation/>

³ Dan Goodin (2025). How North Korea pulled off a \$1.5 billion crypto heist—the biggest in history. Ars technica, 25 February 2025; at <https://arstechnica.com/security/2025/02/how-north-korea-pulled-off-a-1-5-billion-crypto-heist-the-biggest-in-history/>



the urge to talk with and be recognised by the US has diminished. Russian pays for deliveries either in cash or technological support for the nuclear and missiles programs; evidently cooperation is not tied to international law and any moral standards. North Korea did not respond positively to being left off the US travel ban list if the omission was meant to encourage future engagement⁴.

The 2025 National Security Strategy was strong in criticising Europe but short of even mentioning North Korea. The role assigned to Seoul is primarily to contribute to reducing US trade deficit and burden sharing in military and infrastructure investments. The 2026 US National Defence Strategy assigns South Korea the task to keep North Korea at bay and to invest correspondingly under the US 'extended deterrence'.

The European Union's robust partnership with the Republic of Korea is founded upon a shared acknowledgement of the strategic significance of the Democratic People's Republic of Korea, as well as sustained support for South Korean policies through a unique array of agreements and a strategic partnership. The European Union has persistently encouraged successive Korean administrations to advance diplomatic engagement, constructive dialogue, the peaceful resolution of disputes, non-proliferation initiatives, and the pursuit of denuclearization.

As for the South Korean governments' policy towards the North, whether progressive or conservative, Sheena Greitens concludes:

"Korean progressives emphasize economic and social rights in their stance toward the North and focus on improving the welfare of North Koreans through intergovernmental rapprochement with Pyongyang — a process that has often led them to constrain the role of civil society organizations and activists to keep political dialogue going. Conservatives treat consideration of civil and political rights as a precondition for discussions of unification. They are sceptical of the compromises necessary to achieve rapprochement with Pyongyang, and elevate the role of North Korean defectors, including those who openly call for political change to the Kim regime, rather than prioritizing intergovernmental contact"⁵.

President Lee's challenges

The new government of President Lee Jae-myung is expected to be more inclined to engage with the North than the Yoon Suk Yeol administration which advocated unification on South Korean terms as laid out in his last liberation day speech on 15 August 2024⁶.

Thus, a rethink of the traditional fixtures of South Korean policy, preventing war, achieving denuclearization, and laying the foundation for unification will be necessary.

⁴ Yonhap (2025). N. Korea says U.S. entry ban not a matter of interest over its omission from list. 10 June 2025; at <https://m-en.yna.co.kr/view/AEN20250610002100315?section=nk/nk>

⁵ Sheena Chestnut Greitens (2025). How South Korea's Next Leader Should Handle Kim Jong-un. The Journal of Democracy, May 2025; at <https://www.journalofdemocracy.org/online-exclusive/how-south-koreas-next-leader-should-handle-kim-jong-un/>

⁶ Yonhap (2024). Full text of Yoon's Liberation Day speech. 15 August 2024; at <https://en.yna.co.kr/view/AEN20240815002500315>



Kim Jong-un has abandoned the long-standing pet project of unification in a rather radical change of policy. He deviated from the policy lines of his father, Kim Jong-il, and -even more striking, his venerated grandfather, Kim Il-sung.

While it needs two to tango, to maintain the prospect for unification, the South will have to shoulder the brunt of the project to maintain the prospect of unification. While still official policy, there is a clear generational split in the South Korean society. The younger generation has no emotional attachment any longer and is therefore not willing to bear the heavy costs of what they perceive to be 'another' people. This is certainly an area where provincial governments, like Gyeonggi Province, which are prone to foster the people-to-people dimension can play an important supportive role.

Limited options for the incumbent president

President Lee Jae-myung intends to follow a "pragmatic diplomacy grounded in national interests", maintaining South Korea's alliance with the U.S. as the "foundation" of his envisioned foreign policy". This realpolitik will include "future-oriented relations with Japan"⁷ In his inaugural address which marked the transition from campaigner to president and therefore was more sensible than campaign speeches, he hinted at a balanced policy without giving any specifics: "With a defence budget twice that of North Korea, the world's fifth-ranked military, and the Korea-U.S. alliance, we will deter nuclear threats and military provocations while keeping open channels of dialogue to establish peace on the Korean Peninsula."

This is an interesting nuance, deterrence vis-à-vis North Korea, not China, unlike the US. President Lee moved quickly to improve atmospherics in reducing cross border irritations like blaring loudspeakers and exchange of balloons. While the latter make sense politically, this might infringe on the right of free speech and demonstration according to the Constitutional Court. Based on experience, trust and confidence building measures are welcome to reduce tensions, However, a policy based on reciprocity and snap-back measures if commitments are not honoured, will be more effective than one-sided open offers which can be interpreted as weakness.

President Lee put Japan into the trilateral context, "We will reinforce the Korea-U.S. alliance, strengthen trilateral cooperation with the U.S. and Japan and approach *relations* with neighboring countries through the lens of practicality and national interest."⁸ China was not mentioned specifically but is covered by "neighboring" countries – a classic hedging approach to bridge the gap between the largest trading partner, China, and the main security provider, the US, with which South Korea is locked into an alliance. The first personal encounter in the margins of the G7 of both leaders built a base. In pursuing pragmatically wants to pursue a 'two track' approach, e.g., separating historical disputes from forward looking cooperation⁹, President Lee made a historic stop-over in Tokyo on

⁷ Yonhap (2025). Lee's 'pragmatic diplomacy' vision put to test in U.S. alliance, regional power ties .4 June 2025; at <https://m-en.yna.co.kr/view/AEN20250602009900315?section=national/diplomacy>

⁸ The Korea Times (2025). Lee Jae-myung's inaugural speech. 4 June 2025; at <https://www.koreatimes.co.kr/southkorea/politics/20250604/full-text-lee-jae-myungs-inaugural-speech>

⁹ Yonhap (2025). So close, yet so far: S. Korea-Japan ties at pivotal moment 60 yrs after normalization. 15 June 2025; at <https://en.yna.co.kr/view/AEN20250613006900315>



his way to the first summit with President Trump in Washington. Prime Minister Takaishi responded by inviting President Lee to visit her hometown, Nara, a city known for its historic connections to Korea. Together, the leaders pioneered an innovative diplomatic approach, "drum diplomacy," where they played drums along with K-Pop music rhythms.

Should the EU play the China card?

Because of the deteriorating situation between the US and China, China is starting a timid charm offensive, reaching out to the EU, Japan and South Korea while continuing to grant India a favourable treatment. President Xi needs to rekindle growth, needs alternative market access opportunities in the battle with President Trump; strategically Xi continues pursuing a goal he shares with Putin, to split the West, or whatever is left from this notion.

Utilising China's strong position as a market, raw material and technology provider as leverage is not the most effective strategy for the European Union. Nevertheless, given that the United States under President Trump has shifted from a stabilising influence to a potentially destabilising one by questioning established alliances, shared interests, and values, it is essential to acknowledge the geo-economic and political significance of China and incorporate this consideration into future policy development.

At the G7 President von der Leyen delivered a rather hawkish speech on the Global economic outlook, either as a warning when setting the scene for the July summit in Beijing or to renounce playing the China card: "China has largely shown that it unwillingness to live within the constraints of the rules based international system. While other opened their market China focused undercutting intellectual property protections, massive subsidies with the aim to dominate global manufacturing and supply chains. This is not market competition – it is distortion with intent. And it undermines our manufacturing sectors."¹⁰ She also identified China's insistence on its status as a developing country in the WTO as the "biggest collective problem". In September 2025 responded to this criticism. While it did not renounce its status, China announced it would no longer invoke special and differential treatment (S&DT) as a developing country in future WTO negotiations.

Given the economic interdependence with China, the EU has already ruled out decoupling from or isolating China. Without being blue-eyed the EU follows a policy of derisking which does not exclude sectoral cooperation, politically and economically. China has lifted bans on some members of the European Parliament which at the time caused the collapse of the Comprehensive Investment Agreement (CIA). While this Agreement is not reinstated immediately, there is clearly a Chinese interest for cooperation, not least to stabilise its own economy. President Xi will go to great lengths to prevent economic issues at home from causing discontent or political unrest. The negative repercussions of the trade and tariff war with the US are an incentive for China to work more closely with the EU. Therefore, trade negotiations are ongoing, China has also hinted to be forthcoming

¹⁰ Ursula von der Leyen (2025). Statement Session I of G7, Global economic outlook; 16 June 2025; at https://ec.europa.eu/commission/presscorner/detail/en/statement_25_1521



on a deal to secure the supply of essential raw materials like rare earth¹¹; measures to improve market access for goods, services and investment to provide the famous level playing field and reduce the ballooning trade deficit need to follow. However, the profound differences concerning Chinese support for Russia including North Korean troops in Ukraine pose serious problems for cooperation which were not addressed at the EU-China Summit on July 24-25, 2025.

Among the key outcomes of this short summit in Brussels without President Xi was the extension of climate collaboration with China, encompassing initiatives such as clean energy development, methane emission reduction, and carbon market mechanisms. The relaxation of rare earth export restrictions represented a significant positive development for European businesses and is considered a strategic geopolitical decision by China, distinguishing its approach to the EU from that to the United States.

On other issues, neither side is wearing rose-tinted glasses. Commission President von der Leyen emphasized that bilateral ties were at an “inflection point” and called on both sides to “come forward with real solutions.” Meanwhile, according to the official Chinese readout, President Xi Jinping (习近平) urged the EU to avoid “restrictive economic and trade measures” and to keep its markets open. He also called for joint support of multilateralism and opposition to “unilateralism”, a thinly veiled reference to the United States. Notably, the Chinese brief made no mention of the war in Ukraine, a key issue raised by the EU side. Thus, the situation remains volatile as the EU must also to pursue its interests through reciprocity: member states voted 2 June 2025 to restrict access to the vast procurement markets for Chinese medical device manufacturers in response to Beijing’s refusal to open its own tenders to EU firms.

Dealing with North Korea

Restraining North Korea could well be a common interest of the EU and China.

Thus, the EU inviting China to restrain North Korea in its support for Russia, especially concerning further nuclearization with Russian support and know-how. Allegedly, North Korea is pursuing the project of a nuclear submarine - a rather difficult task, remember the AUKUS discussion and fall-out. **Non-proliferation** has been a common denominator between the EU-China and the US; President Trump, however, is using loose language in referring to North Korea as a ‘nuclear state’, opening the door to a path to the nuclear club like in the case of India and Pakistan. Adding another two, South Korea and Japan, to the already existing three nuclear powers in Northeast Asia - China, Russia and North Korea - would hardly be a contribution to stability with South Asia already suffering from the tensions between nuclear India and Pakistan.

In general, the EU pursues a policy of **critical engagement** towards the DPRK. “Its goals are to support a lasting diminution of tensions on the Korean peninsula and in the region, to uphold the international non-proliferation regime and to improve the situation of

¹¹ New York Times (2025). China Hints at Rare Earths Progress With E.U. Before Talks With U.S. 6 June 2025; at <https://www.nytimes.com/2025/06/06/business/china-rare-earth-licensing.html>



human rights in the DPRK.”¹² The EEAS website has been updated last time 18 January 2022 – in these rapidly changing times this negligence is a message.

This EU policy started in 1995 with varying phases of engagement or critique. At the end of the 1990s during a more engaging phase, the EU participated in KEDO, the Korea Energy Development Organisation. The project failed in the end; the EU had only played a secondary role – invited to pay but not to act politically.

The last years have been characterised by pressure and sanctions in implementing the UN sanctions to which the EU added autonomous sanctions. This caused in 2015 the termination of the political and human rights dialogue between the EU and North Korea while some humanitarian aid through NGOs was continued.

Although some member states have embassies in Pyongyang and are striving to get back post-COVID to pre-COVID level, the EU could not prevent the diplomatic failure, that for a long time the Chinese had the only solid line of communication with the Kim regime. The brief interlude Trump – Kim was only a bracket. The forceful engagement of Russia, however, is a game changer.

As President Putin is not interested in terminating hostilities anytime soon and strives to keep up tensions at the border with NATO (Baltic states, Poland), the above mentioned 2024 Treaty on Comprehensive Strategic Partnership between Russia and North Korea has become more than a ‘one-nightstand’ and produces all the risks of an alliance which the EU has to factor in when finally re-examining its policy.

The future role for the EU

Based on a successful free trade agreement, South Korea is the EU's eighth-largest trade partner in goods, while the EU is Korea's third-largest trade partner, a digital trade agreement was added giving life to the Digital and Connectivity partnerships. European companies are the largest source of investment. The EU's trade deficit is compensated by a structural surplus in services (2023).

In the various Asia, Asia Pacific or Indo Pacific strategies, as well as the 2016 Global Strategy and the 2022 Global Compass, the EU has developed the concept of **comprehensive security** in substance and geography. As there is only one security, neglecting the part of the world, which is most dynamic, technologically at the edge, with an overall growing population and a remarkable number of hotspots, is no political option.

Having the capacity to respond to multiple crises at the same time, even with war in Europe (Ukraine), is essential for a major power. While the EU has learned that economic and soft power need also to translate not only into smart but also into hard power, responding to these challenges is particularly difficult when the decade-long reliable ally and partner, turns unreliable calling out the EU as an institution set-up to screw the US.

¹² EEAS. EU and DPRK; at https://www.eeas.europa.eu/eeas/dprk-and-eu_en (accessed 5 February 2026).



This total reversal of politics necessitates a fundamental rethink of the EU's foreign and defence policies and actually acting upon the 'Zeitenwende' the then German chancellor Olaf Scholz rightfully proclaimed.

Politicians and the general publics in Europe must recognise urgently that there is no more space for nostalgia for good old times: Striving for more resilience, more engagement, shouldering more responsibility politically and exercising leadership are challenges the EU shares with its Northeast Asian partners, South Korea and Japan¹³.

This should and could lead to a closer trilateral (EU, ROK, Japan) policy coordination for mutual reassurance and solidification vis-à-vis North Korea, China, Russia and the United States – the latter a new, unusual and disquieting addition to challenges to meet. This situation is at the same time a strong call on South Korea and Japan to overcome the legacies of the past in a sustainable manner. A steady policy outliving changes of governments is necessary to cooperate in the overriding interest, to stabilise the situation thereby strengthening the bargaining power of the three. Cooperation between South Korea and Japan is an essential element in the security equation of Northeast Asia. This cooperation could become even stronger if the principles established at the Camp David¹⁴ trilateral summit convened by President Biden in 2024 continue to endure.

As HRVP Kallas pointed out at the 2025 Shangri-La Dialogue in Singapore:

"North Korea directly contributes to the illegal aggression with soldiers, arms and ammunition. And China says it's neutral, but its dual-use exports are fuelling Russia's war. When China and Russia speak of leading together changes not seen in a hundred years and of revisions to the global security order, we should all be extremely worried." She also recalled: "Back in 2022, former Japanese Prime Minister Kishida warned from this stage that Ukraine today may be East Asia tomorrow. We are over three years into this war now"¹⁵.

Acknowledging geopolitical difficulties, the EU needs to revise its approach by rethinking its traditional and favoured role as a peace project, ensuring this is supported by robust defence measures. The EU plans to allocate up to €800 billion for joint defence investments; without this, it cannot achieve its aim of being a credible global security partner.

The EU has concluded **security and defence partnerships** with Japan and the Republic of Korea. In addition, the Strategic Compass and the Indo-Pacific Strategy foresee a

¹³ Michael Reiterer (2020). The European Union and Security Cooperation: Bringing Northeast Asia into Focus. Global Asia, The East Asia Institute (Seoul, 10 November 2020); at <https://www.globalink.org/commentary/view?cd=COM000044>

¹⁴ Ministry of Foreign Affairs, Korea (2024). Joint Statement of Japan, the Republic of Korea, and the United States. 18 November 2024; at https://overseas.mofa.go.kr/eng/brd/m_5674/view.do?seq=321087

¹⁵ EEAS (2025). Speech by High Representative/Vice-President Kaja Kallas at the IISS Shangri-La Dialogue; at https://www.eeas.europa.eu/eeas/speech-high-representative-vice-president-kaja-kallas-iiss-shangri-la-dialogue_en



deepening of security relations with India and Australia, New Zealand. At the beginning of 2026, the partnership with Vietnam was elevated to the “*comprehensive*” level.¹⁶

More attention needs also to be paid to the Pacific Island states because of their strategic importance and not only because of their essential threats of rising sea levels because of climate change.

The same applies to the **regional trade agreements**, in particular the CPTPP which South Korea is set to join. **Regional trade governance** are important stepping stones for revitalising the rules-based trading system and the WTO, an idea this author had already voiced in 2022, and finally taken up by President von der Leyen in her 2025 State of the Union address in response to President Trump’s erratic trade policy. In November 2025 at a meeting in Australia closer cooperation between the EU and CPTPP participants was agreed. Joining the Partnership like the United Kingdom appears to be too cumbersome and time consuming when quicker action is required. A quarter of a century negotiations of the MERCOSUR free trade agreement, finally signed but sent to the European Court of Justice by the European Parliament, is a serious weakening of the EU in the sole area where it is strong. On the other hand, the signing of the “mother of all deals”, a free trade agreement with India¹⁷ as well as a landmark EU-India Security and Defence Partnership is a strong contribution to governance and shared resilience. These pacts strengthen the autonomy of both partners as well as the rules-based approach; swift implementation is of course necessary to increase leverage. President Trump reducing reciprocal tariffs from imports from India¹⁸ right after India’s agreement with the EU is a strong indication of the effectiveness of this policy.

Despite Ukraine, Gaza, Sudan, North Africa, the Balkans and many more challenges, Europe must cultivate a long-term, strategic commitment to Northeast Asia and therefore aim at contributing to find solutions to the specific regional hotspots, North Korea, Taiwan, South and East China Sea, India-Pakistan to name a few.

North Korea

Experience with NAPCI, the Northeast Asian Peace Cooperation Initiative under the presidency of Park Geun-hye¹⁹, and the Ulaanbaatar Dialogue shows that **it needs more than functional cooperation** to solve high stakes political and security problems, although functional cooperation can become an important stepping stone. The so-called Zermatt Dialogue managed by the Swiss think tank Geneva Centre for Security Policy (GSCP) provides a platform to meet but lacks the element of power of persuasion necessary for talks to produce results.

¹⁶ Joint statement on upgrading relations between the European Union and Viet Nam to a Comprehensive Strategic Partnership, 29 January 2026; at https://ec.europa.eu/commission/presscorner/detail/de/statement_26_255

¹⁷ European Commission (2026) EU and India conclude negotiations for largest trade deal in their history. 28 January 2026; at https://ec.europa.eu/commission/presscorner/detail/en/ac_26_253

¹⁸ BBC (2026) US and India reach trade deal, Trump says after Modi call. 2 February 2026; at <https://www.bbc.com/news/articles/c5yve1x9zv0o>

¹⁹ Michael Reiterer (2015). The NAPCI in the Volatile Security Environment of North-East Asia: Which Role for the European Union? *European Foreign Affairs Review* 20, no.4, 2015; pp. 573-590.



North Korea's alliance with Russia renders every effort more difficult – the **'my enemy's friend is my enemy'** logic cements a relationship instead of weakening it. The EU can either encourage member states to provide track 2 or 1.5 platforms or do it itself with a broader basis.

Nominating a **special representative for Northeast Asia** who has the time and infrastructure to work in and with the various stakeholders in the region would manifest the EU's engagement in this important region, add an element of stability and sustainability, and translate the EU's narrative into action. In times of budgetary constraints drawing on defence spending could be a solution, as this would only be a tiny fraction of the envisaged € 800 bn. As a policy axiom, prevention is always cheaper than warfare and reconstruction.

Supporting South Korea's policy towards North Korea has been a trademark of the EU's policy. The political consultations upgraded to the ministerial level provide the platform for policy coordination. Given the geopolitical situation, the EU should continue stressing the need to cooperate with Japan, both countries are concerned and threatened by a hostile North Korea supported by aggressive Russia. The EU seeking better relations and an understanding to prevent proliferation of nuclear devices and weapons of mass destruction with China would impact on North Korea. Achieving stability and nuclear restraint on the Korean Peninsula strikes a chord in the region, as expressed by the 27 May 2024 Joint Declaration of the 9th Republic of Korea-Japan-China Trilateral Summit²⁰.

Due to Russia's support and its recent inroads in missiles and weapons technology, albeit with setbacks as the disastrous launch of a new 5,000-ton destroyer showed, North Korea has become an international and no longer only regional problem. While denuclearisation remains the global goal, it is unlikely that North Korea will give up its nuclear arsenal which guarantees regime survival.

The recent attack of Iran by Israel, supported by the US by attacks on Fordo, Natanz and Isfahan with bunker buster" bombs (GBU-57 Massive Ordnance Penetrator - MOP) will harden this conviction: Ghaddafi in Libya, Hussein in Iraq and Ukraine renounced nuclear weapons and paid a heavy price.

Consequently, striving for **'complete, verifiable and irreversible denuclearization'** is no longer a realistic short-term goal while remaining an idealistic long-term one. The discussion whether South Korea can continue relying on the US nuclear shield and US boots on the ground under Trump, or whether it should go nuclear itself with consequences for proliferation, has already arrived in South Korea. Switching to arms reduction talks, coping with the nuclear threat in the region through deterrence will need an international response.

²⁰ "Prime Minister Kishida expressed serious concern over North Korea's nuclear and missile activities and development of military cooperation between Russia and North Korea, and reconfirmed that the denuclearization of North Korea and the stability of the Korean Peninsula is the common interest of the three countries. Prime Minister Kishida stated that the three countries should urge North Korea to completely abandon its nuclear and ballistic missile programs in accordance with relevant United Nations Security Council resolutions. Prime Minister Kishida also asked for continued support of the leaders of the ROK and China for the immediate resolution of the abductions issue and gained their understanding." Ministry of Foreign Affairs, Japan (2024). The Ninth Japan-China-ROK Trilateral Summit. 27 May 2024; at https://www.mofa.go.jp/a_o/rp/pageite_000001_00376.html



To render the EU policy with North Korea more dynamic, all member states have to be on board, including France which does not maintain regular diplomatic relations but operated only a cooperation office for humanitarian and cultural matters from 2011 until its COVID induced closure in 2020. As a permanent member of the UNSC France bears special responsibility within the UN as well as for EU foreign policy making.

Multilateral engagement

Invitations to the **G7** and **NATO** summits are a recognition of South Korea's strategic position in the region and a contribution to stabilise the country after the internal turmoil in pulling it back into the community of responsible international actors. This will help President Lee to "expand Korea's diplomatic reach, raise [Korea's] international stature and enlarge our economic territory."²¹

However, in the context of NATO as a AP4 country²², it will not only be honour and participation but also shouldering of additional costs: the 5% GDP target for defence spending will also be applied to Asian partners and allies according to US sources²³. This would translate into a doubling of South Korea's already considerable defence spending and support for stationing of US troops. (In 2025 South Korea's defence budget stands at around 61.2 trillion won (US\$44.6 billion), about 2.32 % of its GDP.²⁴) Turning down the invitation to the 2025 summit because of burning domestic issues allows various interpretations: stepping back from NATO as a transatlantic military alliance as criticised previously by the opposition leader Lee; renouncing to avoid further irritating China and Russia; or pragmatically, in recognition that the much wanted meeting with President Trump was difficult to secure (Trump had left the G7 before the arranged meeting could take place.)

Hosting the 2025 **APEC summit** in South Korea offered the occasion for the long-sought for summit with President Xi. Preventing a further emboldening of North Korea because of its alliance with Putin's Russia is a common goal where joining hands of China, South Korea, Japan and the EU could lead to common diplomatic efforts.

This EU-South Korea cooperation should also include **ASEAN**. Like the EU, South Korea has traditionally supported ASEAN. Economic security upgraded the geoeconomic importance of the ASEAN market for diversification, supply and production chains. In terms of security policy countries like the Philippines, Vietnam and Indonesia are part of the island chain parameters.

South Korea reaching out to partners who share the interest to **counter the insecurity** created by the transactional policies of President Trump, like the EU, Canada, Australia, New Zealand, ASEAN and - at least partly India would enlarge the room of manoeuvre and increase autonomy. Thereby strengthening **trade governance** could play a pivotal

²¹ The Korea Times (2025).

²² Michael Reiterer (2024). NATO and the Republic of Korea: The AP4 in the Indo-Pacific". 38 North, 9 April 2024; at <https://bit.ly/43UAhyr>

²³ Yonhap (2025). S. Korea says share of its defense spending against GDP 'very high' compared with key U.S. allies. 20 June 2025; at <https://m-en.yna.co.kr/view/AEN20250620003552315?section=search>

²⁴ Yonhap (2025). Trump repeats NATO members should spend 5 pct of GDP on defense. 20 June 2025; at <https://m-en.yna.co.kr/view/AEN20250621000351315?section=national/diplomacy>



role: The necessity to provide economic security, secure and stable supply and production lines as well as sea lanes for transport, or more generally the need to get back to a stable rules-based international order, provide a sound interest-based foundation for enhancing cooperation for middle powers. In the aftermath of COVID-19, China's instrumentalization of rare earth exports and Trump's transactional tariff and economic policies made it abundantly clear that a more organised response was needed.

As pointed out already in 2022, the regional trade agreements, RCEP and CPTPP merit more attention by the EU²⁵. In view of President Trump's unruly trade policy, President von der Leyen has taken up this issue, recognising that closer cooperation with the interested countries in this economically and technically prone region could serve as a stepping stone to revitalise rules based free trade and the WTO²⁶. In the more immediate future, demonstrating that rules-based policies produce better results in the interests of participating countries is the necessary enabler giving agency to such an approach.

Conclusions

Considering North Korea's significant advancements in nuclear and missile capabilities, Kim Jong-un's increasingly aggressive stance which now includes the possible first use of nuclear weapons under certain circumstances (read: threat to the survival of the regime), the ending of its longstanding special relationship with South Korea and the rejection of unification with what it now sees as an enemy, as well as the backing of two permanent UN Security Council members, China and Russia, and an alliance like strengthened strategic partnership with Russia, and finally a US president who pursues transactional policies without values, it is evident that simply relying on traditional diplomatic approaches is no longer feasible for South Korea or the European Union. Both must recognise that past strategies, **'Back to the Future'**, will not suffice in this dramatically altered geopolitical landscape.

"Forward to the Past", learning from history but adapting those lessons to new realities rather than simply repeating old patterns, must be the new policy direction. This will need more than just a pragmatic diplomacy or the continuation or only slight update of critical engagement²⁷.

The new geopolitical situation e.g., **power politics in a multipolar world** where international law and guardrails are weakened, the direct involvement of North Korea in Ukraine and the constraints to placate President Trump in pursuing his China policy and yet unclear North Korea policy, will constrain the room of manoeuvre outside the US-China-Russia triangle, including for the incumbent South Korean President, considerably. The worst-case scenario would be Korea-passing after a successful deal Trump-Putin on

²⁵ Michael Reiterer (2022). Regional Trade Agreements in the Indo-Pacific: Does the EU Risk Losing Sight of Their Importance? CSDS Policy Brief 01/2022; at <https://csds.vub.be/publication/regional-trade-agreements-in-the-indo-pacific-does-the-eu-risk-losing-sight-of-their-importance/>

²⁶ Reuters (2025). EU's Pacific alliance would not replace WTO, EU officials say. 27 June 2025; at <https://www.reuters.com/en/eu-alliance-with-pacific-rim-could-lead-wto-redesign-von-der-leyen-says-2025-06-27/>

²⁷ Michael Reiterer (2026) The Puzzle of South Korea's Foreign Policy: Can You Have It All? Global Policy 2026 <https://doi.org/10.1111/1758-5899.70131> (forthcoming)



Ukraine: Putin could take on the role as facilitator for a renewal of the Trump-Kim Jong-un contacts, a role previously played by President Moon Jae-in during the first bromance.

As for the EU to preserve some influence, it must **strengthen its engagement with East Asia, the Korean Peninsula and North Korea** to pursue its security interests in updating and adapting the principles laid out in the Strategic Compass and its Indo-Pacific Strategy²⁸ to the new situation created by Trump II as well as the technological progress reached by North Korea. Security is interconnected; only deeper involvement will lend the EU credibility as a political and security actor in the region and avoid EU-passing in policy making. As a sizable economic power with a track record of promoting rules-based policies, the EU has credibility to act as the defender and promotor of a **rules-based order, rule of law** to prevent further progress by *'might is right'*.

Revitalising the rules-based trading order through cooperation with partners in the region, such as those participating or considering doing (South Korea) in the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), could be at the same time a stepping stone for redesigning the WTO. To recall, TPP was the economic pillar of President Obama's pivot to Asia which Trump I abandoned.

The current policy of *'critical engagement'* needs a rethink, a stronger commitment to engagement, diplomacy to solve the nuclear crisis and prevent further proliferation. The EU has gained considerable experience in this field when leading the negotiations with Iran which resulted in the Joint Comprehensive Plan of Action (JCPOA) for the exclusively peaceful use of nuclear energy. An **EU Special Representative (EUSR) for Northeast Asia** could help implementing an innovative approach visibly and signal unity and presence, important features for being effective. While *'flying the flag'* is always important in diplomacy, this applies in particular to Asia where personal contacts are crucial.

North Korea's **nuclear threat** needs to be countered by firm diplomacy and deterrence seeking dialogue on arms reduction with the ultimate goal of denuclearisation and avoiding proliferation.

Applying the **Korean Peninsula recipe to Ukraine** e.g., a frozen conflict with an armistice but no peace agreement, could be a short term means to stop fighting but would at the same time add another unstable, unresolved situation but not a sustainable solution although provisional agreements can develop quite some staying power.

In extending its **Connectivity Strategy**²⁹ the EU could foster an arrangement between South and North Korea, for instance reconnecting the railway systems, would connect the Korean Peninsula to Europe via the Eurasian landmass. This could have a double function: adding to the security of communication lines of the South while being part of an incentive bargaining package, in case talks with North Korea restart in earnest.

²⁸ Michael Reiterer (2023), *The European Union in Asia and the Indo-Pacific: international cooperation in the era of great transformation and mounting security challenges*. Lausanne, Jean Monnet Foundation for Europe, Debates and Documents Collection, issue 31, December 2023; at <https://jean-monnet.ch/wp-content/uploads/2023/12/23-12-eu-asia-indopacific-m-reiterer-cdd-31.pdf> (open access).

²⁹ See Shiong Kim, Michael Reiterer (eds). *Connecting Europe and Asia: Security, Economy and Mobility*. Huine HUFU University Press, Seoul, 2023.



To end this analysis on a positive note: Autocratic powers tried to bend the global order to their will, started the Second World War and lost. 80 years ago, freedom prevailed because defenders of the order joined hands and arms. Citizens were at the forefront, and this has not changed. This puts a special obligation and responsibility on provincial and local authorities which are close to the people. Today's call is to repeat the positive experience of the previous generations to rebuild and maintain a rules-based order where might is not right.

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