

July 9, 2024



Executive Summary Report

This “ExSum” examines recent provocations and escalations by North Korea, and discusses implications of these provocations and a likely forecast of what to expect in the months. Those watching the decades-old cycle of provocations and responses on the Korean peninsula perceive a continuing pattern without a foreseeable resolution.

Many appropriately call North Korea, the “Hermit Kingdom.” Since its inception following World War II, three successive regimes led by the Kim family employ isolation and gross misinformation as tools to control and govern. Employing perhaps the harshest authoritarian methods in the world, Kim Jong Un (KJU), like his father and grandfather, has continued to create conditions where his people live in squalor with recurring cycles of starvation – all to preserve an oppressive regime.

Likewise, Kim has continued his predecessors’ approach to international relations. Successive regimes have been aggressively antagonistic to the West, supported at varying levels over the decades by China and Russia and fixated on a military build-up – often flexing the military in disruptive ways. The latter are commonly labeled: *North Korean provocations*.

Additionally, recent apparent agreements between KJU and Russia’s President Vladimir Putin suggest deepening ties. These stronger ties pledge cooperation in several areas to include increased military armaments shipments from Pyongyang to Moscow in support of Putin’s war effort in Ukraine and a renewed guarantee of mutual defense support. These agreements signify a closer alignment between North Korea and Russia than has been seen since the Cold War.

Key Points on North Korea:

- An emboldened KJU will not cease the North’s provocations nor abandon his maturing ballistic missile and nuclear programs.
 - There are no incentives for the KJU regime to consider doing so. With a post-COVID economy in shambles, the North’s sole bargaining chips are its provocative policies/actions underpinned by North Korea’s military, especially their missile and nuclear capabilities.
 - Giving up any of these would weaken Kim’s bargaining position externally and leave him vulnerable internally.
- Though North Korea remains a heavily sanctioned pariah state to most of the world, informal support from China persists and could potentially grow. More significantly, the recent highly publicized strengthening of ties with Putin’s Russia will not only embolden Kim but likely supply his regime with much-needed technological and material support. The situation does not bode well for any relaxation of tensions or reduction of provocations from the peninsula.
- Those allied with the U.S. against the North will continue to strengthen their efforts.
 - The Biden administration appears to have recognized the need to alter the current approach to dealing with the North and assuring the South. The latter includes a new Nuclear Consultative Group to map out a plan for enhanced extended deterrence.
 - This realization coincides with (or is a result of) South Korean and Japanese recent leadership’s efforts to respond to Kim’s provocations and advanced weapons build-up. Expect to see increased efforts from the South Koreans and Japanese to thwart the North’s provocations and advanced weapons development.

Implications:

North Korea, despite its isolationist position, terrible economy, and ineffective diplomacy, remains on the world stage. This is for several reasons. Their contentious relationship and menace to their Southern neighbor, and America's long-term ally, South Korea, is reason enough. But this is worsened by North Korea's dangerous advances in their short, mid, and long-range ballistic missile programs and continued progress with their nuclear weapons program. These advances present a real and increasing threat to South Korea (another historical enemy in the region) as well as to Japan and to the United States.

Further, with the return of Great Power Competition, North Korea has found opportunity to improve relationships not only their traditional and informal ally China, but they are also dramatically rekindling their friendship with Russia, with whom they have historically had an off-and-on relationship. We will return to possible ramifications of this in paragraphs that follow.

North Korea has become famous, or perhaps infamous, for their cycles of provocations – aimed at regional foes as well as the United States. Recent activity suggests that a slowdown is not on the horizon. Since the “re-freeze” in relations began and subsequent increased provocations by the North, South Korean President Yoon Suk Yeol has been under increasing pressure to answer KJU's rhetoric and demonstrations. His frustration was apparent when he stated in January of this year that his country might seek its own nuclear arsenal or request the U.S. deploy nuclear forces to the peninsula. While he later retracted this comment, his statement affirms just how seriously he and the people of the South take the recent provocations from the North.

And those recent provocations are many – and they are public. In addition to several military exercises and artillery/cruise missile barrages (often tied to joint U.S.-ROK exercises), consider that from the beginning of 2022, the North has conducted over 100 missile tests. In 2023, this includes approximately 24 Short-Range and Intercontinental Ballistic Missile (ICBM) launches dozens of cruise missile tests. Pair this with the first-ever (and apparently successful) test of the North's first solid propellant ICBM (expected to range the continental U.S.), suspected preparations for a resumption of nuclear testing at the North's two primary nuclear sites, announcement of new tactical miniaturized nuclear weapons, the planned development of an underwater drone capable of creating a “radioactive tsunami,” and recent pronouncements suggesting Pyongyang now considers a preemptive nuclear strike as an option, provides a clear picture of the gravity of the situation – while the tit-for-tat demonstrations continue, the backdrop and stakes have changed.

Until very recently, the response from the U.S. and allies has been more of the same: attempts at sanctions for UN Security Council Resolution violations, routine joint exercises, and of course public condemnation. Despite China's Premier joining leaders of South Korea and Japan in calling for a nuclear free peninsula during a recent trilateral summit, Chinese leadership has stopped well short of calling for a denuclearized North. So, with the option of increased pressure/sanctions from the UN a non-starter (with Russia and China holding permanent seats on the Security Council) and with the rising tensions between the U.S. and China and Russia, the U.S. and its Pacific allies now appear to be ratcheting-up what RAND contributor Soo Kim calls the old “business as usual” approach.

In recent months we've witnessed ramped-up allied exercises, deployments of nuclear-powered Los Angeles class and Ohio class submarines to the South, increased U.S. long-range bomber activity, and an August joint Camp David agreement between the U.S., South Korea, and Japan. This agreement pledges the parties to conduct tri-lateral exercises, share missile warnings, and establish a working group to address the North's growing cyber threats. In addition, the South's President has vowed to engage G-20 and ASEAN nations for greater support in countering the threat on the peninsula.

We will have to see what effect this has on Kim's actions. While the planned ramp-up from the West is a departure in some ways from the “business as usual” model, there is great skepticism that these enhanced get-tough efforts will have any effect on the North's nuclear and missile ambitions – or their provocations.

North Korean provocations and advanced weapon/delivery system development will continue, and the U.S. and its allies will be forced to watch it happen. Further sanctions will have little effect as the North is essentially isolated now, with China accounting for over ninety percent of the North's external trade. Further sanctions by the West will have a negligible impact.

With no other leverage cards to play, Kim will be forced to stay the course vis-à-vis bellicose rhetoric, development of advanced systems, a regime-supporting schedule of provocations, and seeking further enhanced relations with China and Russia.

After the Russian invasion into Ukraine in 2022, as Russia and China were likewise drawn closer, and when additional UN Security Council sanctions were introduced after continued and aggressive North Korean non-compliance with long-range missile testing in violation of previous Security Council resolutions, both China and Russia vetoed the measure.

This year, the Biden Administration accused North Korea of sending arms to backfill Russian depleted stocks of artillery rounds and the like. During a recent military parade where North Korea displayed their latest military wares, to include their new solid-fueled long-range missile, attending alongside KJU was Russian Defense Minister Sergei Shoigu and Chinese ruling party official Li Hongzhong. KJU visited Putin in eastern Russia in September 2023 to reaffirm their strengthening relationship and Putin's historic June visit to Pyongyang (and resulting agreements) demonstrates even deeper ties. This has troublesome ramifications for the war in Ukraine as North Korea continues to resupply the Russians with munitions, and it is an open question as to the extent that Putin may go to repay the favor. In late September, South Korea held its first military parade in about a decade, perhaps a response to KJU warming relations with Putin and in response to the June meeting in Pyongyang, the South has suggested it may start sending military aid to Ukraine.

Forecast:

Kim will continue to bolster his nation's relationships with China and Russia. While China's support is characteristically muted, Russia's is more pronounced. Recent apparent agreements to more overtly provide the Russian military with munitions needed for the war with Ukraine allow Kim the unusual position to be the supplier. This leverage will allow Pyongyang an opportunity to not only deepen political support from Russia, but afford the North with access to additional advanced weapons technology from Russia.

The North's nuclear weapons and missile development will continue apace. While Pyongyang is clearly well behind the West in development of missile and nuclear systems, they are on a solid curve to increase both the quality and quantity of their systems. This trend will only be enhanced with potential technological leverage from Russia based on their increased support for Russia's stalemated war in Ukraine and the recent mutual support and cooperation agreement.

Provocations from the North will continue unabated. While the systems and methods are changing, the provocations will persist. Absent a major misstep by the North causing an abandonment of the West's tit-for-tat approach, even with increased attention from Seoul, Tokyo, and Washington, unfortunately, it will be business as usual.

We might see more North Korean nuclear tests, that Russia would almost certainly not condemn (and perhaps China as well), ensuring that the UN Security Council is next to powerless to further sanction North Korea. Similarly, they could increase production of both short-range and long-range nuclear weapons, with the West lacking the levers to abate their efforts. North Korea could increase their missile tests, especially with their improving long-range missiles, testing their new submarine that almost certainly will carry nuclear weapons, as well their new cruise missiles.

With the return of Great Power Competition and opportunities for the North to enhance its relationship and standing with not only their long-term big brother, China, but with Putin's Russia as well, there are many potentialities for escalation.

Closer ties between Pyongyang, Moscow, and Beijing could herald closer military cooperation in the region. The North's military provocations are worrisome enough when they act alone. Kim's forces acting in unison with Russia and/or China would be a considerable challenge for the West and its Pacific allies. North Korea could time its bad behavior to coincide with Russia's and/or China's disruptive actions. More concerning, however, is that Russia and/or China may begin to use (either directing or at least incentivizing) North Korea to aid in their competition with the U.S. to pose new challenges for the West. It is not hard to envision scenarios where the North's provocations are synchronized during a time of crisis between the U.S. and China or Russia (or both) to further stretch the U.S. and its allies.

Time will tell which course (or courses) KJU will choose, but one thing is almost certain: North Korean provocations on the peninsula will not slow.

Economic Perspective:

A key consideration from an economic perspective is the developing relationship between North Korea and China. U.S. tariffs of certain Chinese goods by U.S. Presidential orders could increase their motivation to supplement demand from both North Korea and Russia. Strategically for China it is both an offensive and defensive economic move to work with North Korea. North Korea's threats to South Korea coupled with China's aggression to Taiwan can create disruption in the technology value chain. Taiwan and South Korea are both key players in the next generation value chain for advanced technologies including Artificial Intelligence through their production of microchips. Companies should continue to monitor the North Korea moves through the lens of potential supply chain disruption in the Asia Pacific Region, specifically in the technology sector.

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