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The North Korean Unification Policy Pivot
Motives and Military Risks

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At the turn of the year, North Korea's decision to drop the goal of peaceful unification with South Korea and designate it the most hostile enemy alerted the world to the possibility that Pyongyang is preparing to challenge the status quo on the Korean Peninsula. This memo identifies a range of possible defensive and offensive motives behind the policy pivot based on North Korean interests in unification, regime survival, and gaining recognition as a nuclear power. The analysis not only finds that the policy shift may pursue defensive or non-military intentions, but also identifies several military risks: Pyongyang could use conventional force against US-ROK targets to enforce North Korea's maritime boundary claims, legitimise the state's military expenditure, and maximise pressure on US decision-makers. A determination to wage major war, however, does not appear motivated in normal circumstances.

On New Year's Eve 2023, North Korea (the Democratic People's Republic of Korea, or DPRK) officially abandoned the goal of peaceful unification with South Korea (the Republic of Korea, or ROK), as North Korean leader Kim Jong Un declared it impossible.[1] Two weeks later, on January 15, 2024, Kim pronounced the North-South relationship as one "of two belligerent states" and identified South Korea as the "most hostile state" to the DPRK.[2] Kim furthermore instructed the Korean People's Army (KPA) to heighten war preparations and called for the removal of all references to unification in North Korean society, including the constitution. Accordingly, over the following months the state worked systematically to remove and replace symbols of Korean kinship throughout political and economic institutions, media, architecture, infrastructure, the education system, et cetera.

North Korea's redefinition of inter-Korean ties is symbolically significant in two major ways. First, the "Two Koreas" policy is a clear departure from the principles of the late North Korean leaders, Kim Il Sung and Kim Jong Il. The unification issue has defined inter-Korean relations ever since the partition of the peninsula in 1945, and amid enduring mistrust and tensions, the agreement to pursue peaceful unification has presented a unique avenue for Pyongyang and Seoul to engage in occasional cooperation and diplomatic talks. Despite the declining feasibility of a one-state solution, given the growing economic, political, and military gaps, both Koreas have committed great efforts to keeping the unification door open. However, in the December statement, Kim called for the need to "admit" the reality that the ROK is a foreign country and the North's principal enemy. Recognising the unification paradigm's long history, some pronounced this shift an "ideological bombshell" and the "most ground-breaking thing Kim Jong Un has ever proclaimed."[3]

Second, the rhetoric consolidates North Korea's more confrontational stance toward its neighbour in recent years. Since the conservative South Korean Yoon Suk-yeol government assumed power in 2022, North Korean weapons tests have increased in frequency, intensity, and sophistication, suggesting a growing military capability. Pyongyang's suspension of all inter-Korean communication channels since April 2023 and the mutual withdrawal from a bilateral military agreement since June 2024 heighten the risk of clashes in the increasingly tense border areas.

Meanwhile, the possibility of *intended* confrontation appears to be on the rise. As part of Pyongyang's new policy direction, official statements strongly allude to the return of war on the peninsula, supported by behavioural changes such as the leader's drastically increased participation in public military activities.[4] ROK intelligence asserts that North Korea appears to be "transitioning to a state of war with the South" and may "undertake actions aligned with wartime circumstances."[5]

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For these reasons, the intentions behind the policy pivot have attracted much attention from North Korea observers globally. One group of analysts views the shift as reflecting offensive ambitions, with different understandings of the motive: Kim Jong Un losing hope in diplomatic engagement;[6] paving the way for territorial revision;[7] and justifying the state's high military spending amid growing domestic dissent;[8] among others. Another group is unconvinced that recent developments signal a departure from the status quo and offers different explanations for Pyongyang's confrontational rhetoric: ramping up tensions to win US concessions;[9] mirroring Yoon's hawkish stance;[10] removing South Korean cultural influence;[11] et cetera. Yet others dismiss a major North Korean attack while underscoring that growing tensions lower the threshold for unintended escalation, a serious risk in itself.[12]

This wide range of interpretations of North Korea's unification policy reversal warrants further investigation. Not only do we need a better understanding of the potential military implications of the new posture, but it is also essential to understand *why* and *what* Kim Jong Un gains (or does not gain) from using military force in order to effectively navigate potential security contingencies. The United States's central role in the Korean security environment means a North Korean crisis may yield spillover effects in the transatlantic theatre, also necessitating an informed awareness of peninsular affairs in Europe and across NATO. By exploring a range of possible motives for North Korea's policy pivot, this memo seeks to contribute a baseline for understanding the intentions in redefining inter-Korean ties by answering the following questions: *In what ways might North Korea's new approach to inter-Korean ties advance its interests? And what motives might influence the leadership to choose to proceed with either offensive or defensive military action?* To this end, a literature review of recent analyses of the policy pivot is conducted to systematise not only perspectives on recent developments but also the implications of these perspectives for North Korea's military posturing and future policymaking.

Interpreting intent

International relations theory posits that, to make good policy decisions, governments must interpret and assess the intentions of other states; however, to what extent it is possible to know these intentions is a much-debated question. The general nature of a state's intentions (cooperative or hostile) is typically possible to infer from national characteristics and behaviours such as regime type, foreign-policy goals, treaty commitments, and arms-procurement patterns.[13] However, indicators of intent are rarely fully reliable: states can send misleading signals to conceal strategic plans; intentions can genuinely change over time; and some indicators, such as the personalities of individual leaders, are of poor quality to begin with.[14] Moreover, actors can have similar intentions for different purposes, depending on their interests and goals. Knowing the reasons *why* states intend to act in a certain way, i.e., their motives, is therefore crucial to how other states perceive and respond to the action.[15] Operationally, intelligence services determine state actors' intent by looking at the state's motives and geopolitical priorities as reflected in for example official statements.[16]

This memo examines whether recent North Korean policy actions can be interpreted as having offensive military intent, defined as the will to pursue intentional and motivated military confrontation, coercion, escalation, or attempts to go to war against South Korea or the United States. Interpreting the intentions of North Korea is particularly challenging due to the complete lack of insight into its internal affairs and the leadership's unusually prominent tendency to say one thing and do another. Possibly more than any other state, the DPRK has used fiery rhetoric without its resulting in military action. Notable examples include its threats to turn Seoul into a "sea of fire" in 1994 and to launch a "pre-emptive nuclear attack" on the UN headquarters in 2013.[17] While Carlin and Hecker assert that Kim Jong Un's increasing calls for war preparations this year are qualitatively different from the country's "typical bluster," several analysts refer to this gap between rhetoric and reality in dismissing the probability that North Korea intends any imminent military action based on its recent war-inspired speechmaking.[18]

Yet, Pyongyang has a track record of engaging in severe military escalation without warning, notably the sinking of the ROK vessel, *Cheonan*, and the shelling of Yeonpyeong Island in 2010. Actions such as these have been unexpected, and previous North Korean leaders are known to have used unpredictable tactics to address threats.[19] The possibility of offensive military intent must therefore not be dismissed without considering behavioural cues that could provide clues to Pyongyang's motives and overall strategic direction; these could be

institutional changes, domestic policymaking, military mobilisation, and expressions of public dissent.

Although Kim Jong Un is occasionally described as an impulsive leader without strategic vision, this memo departs from the assumption that North Korea is a rational actor making strategic decisions framed by multiple domestic and international factors.[20] Even though some observers interpret the policy shift in reactive terms, stating that North Korea is simply mirroring South Korea's increasingly assertive political and military posturing, this perspective downplays Pyongyang's response as lacking independent strategic intent.[21] Momentum towards current developments started long before the Yoon administration assumed office, suggesting that the redefinition of Korean nationhood is not a response to an individual South Korean government's policies, even though recent changes emphasising aggressive measures in the ROK's defence doctrine certainly influence Pyongyang's overall threat perception. Similarly, North Korea's weak conventional capability relative to South Korea's frames the regime's policy options, rendering a large-scale, long-term offensive a much less appealing alternative than using hybrid or asymmetrical means of warfare.

This memo identifies motives for offensive and defensive action emerging from three core North Korean interests: a) unification of the Korean Peninsula, b) regime survival, and c) gaining acknowledgement as a nuclear power. These interests were identified through an iterative reading of analyses of the policy pivot published in English and Korean since January 2024, grouping together texts that make similar arguments (offensive or defensive, and why) on the one hand, and contrary arguments on the other. From this, it became clear that most arguments concern one of three fields: state building, nationhood, and ideology; military and political security; and foreign policy and prestige. This categorisation was then refined through research on North Korean interests, providing context for interpreting the intentions behind and military implications of recent developments. The result reads as follows: to achieve its interests in unification, regime survival, and nuclear power status, North Korea is motivated to pursue either offensive, defensive, or non-military action through redefining inter-Korean ties for either reason A, B, or C. As a final note, North Korea's interests are presented in the given order for narrative clarity and do not reflect the order of importance.

Unification

Historically, unification of the Korean peninsula under DPRK rule has been regarded as the most consistent motive for a North Korean offensive against the ROK. When the peninsula was divided by Soviet and US forces in 1945, reuniting the nation became the top priority in both North and South.[22] Deep disagreements on the preferred political system, however, eventually led both sides to advocate a military solution. Kim Il Sung's conviction to achieve "unification by warfare," combined with the assessment that DPRK forces had the upper hand over a poor, weak, and corrupt South, ultimately culminated in the Korean War (1950–53). Because the war ended through a ceasefire agreement, not a peace treaty, it left the parties without closure, propagated the zero-sum view that there can be only one Korea, and resulted in decades of mutual hostility and military confrontations. The ambition of peaceful unification based on national unity entered the agendas in Seoul and Pyongyang with the issuing of a pivotal joint communique in 1972, although the parties did not agree to recognise each other's existence as separate, but not sovereign, entities until 1991.

Upon assuming power in 2011, it was likely that Kim Jong Un was personally indifferent to unification. In 2014, he proclaimed that North Korea should make "fresh headway in the reunification movement" in accordance with the wishes of Kim Il Sung and Kim Jong Il.[23] This phrasing suggests he carried on the unification policy for the sake of tradition, similar to the centrality of the *Juche* (self-resilience) and *Seongun* (military-first) policies to the hereditary power.[24] However, both DPRK-US and inter-Korean relations deteriorated rapidly in 2019, when negotiations with US President Trump collapsed amid high expectations and exceptional momentum. This outcome likely deeply disappointed Kim, decisively changing his willingness to engage with Washington and Seoul. In 2020, North Korea blew up an inter-Korean office in response to leafleting from the South, in what Sung Ki-young describes as the pivotal moment when Kim Jong Un decided to rule independently of his father and grandfather's unification ideals.[25]

The following year, Kim further broke with traditional discourses, premiering slogans like "Our State First" and "Our People First."[26] In the January 15 speech, Kim called for the removal of the principles of "independence, peace, and national unity" from the

constitution, completely erasing the unification legacy of previous rulers. To underscore his message, he immediately disbanded or reorganised the political agencies in charge of North-South relations and ordered the removal of unification symbols across society. The shift from viewing the South as an object for revolutionary liberation to treating it as a foreign enemy thus follows a period of deteriorating relations. The gradual emergence of anti-unification messaging suggests Pyongyang is recalibrating its approach to inter-Korean relations both intentionally and strategically. But does this imply an interest in revising the status quo?

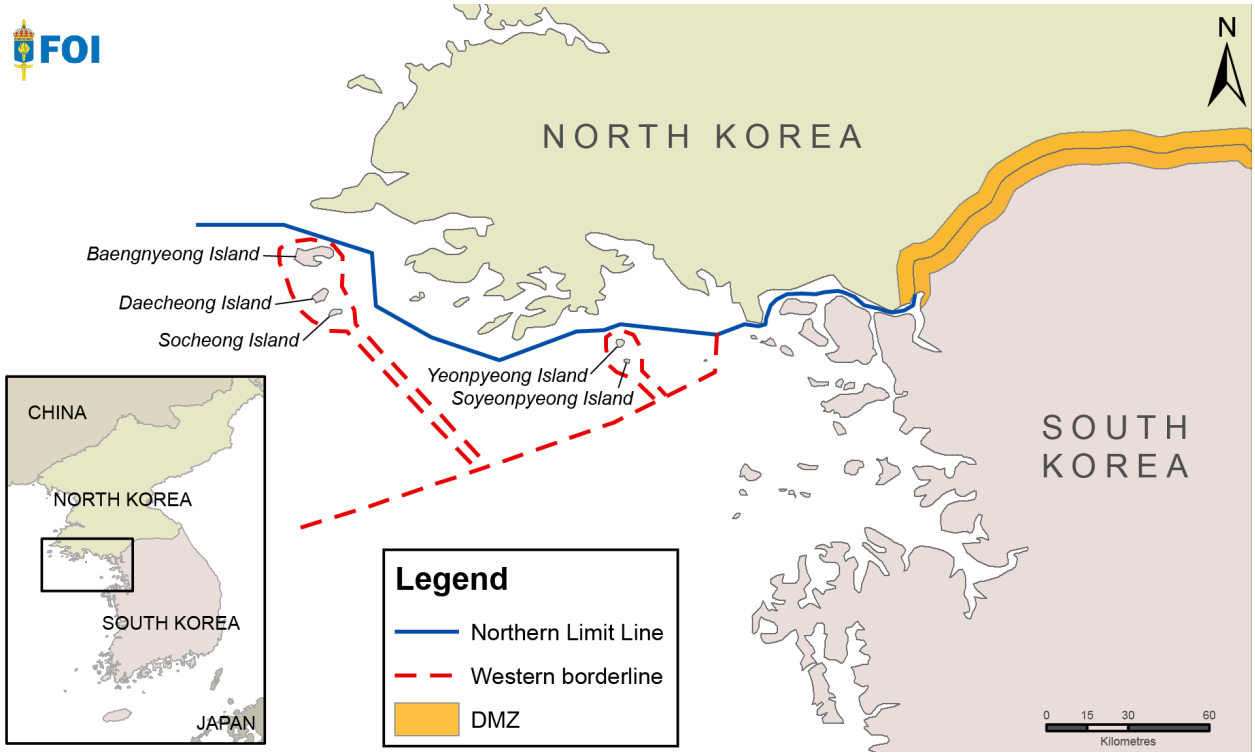
First, the most straightforward interpretation of the policy shift is that North Korea, true to its word, has after nearly 80 years abandoned all interest in pursuing a unified Korea. Possible motives for this include policy pragmatism, i.e., the need, cited by Kim in the January speech, to face the reality that unification efforts are a path to nowhere. One reason may be the significant fluctuations in the ROK's North Korea-policy over the years. Polarised attitudes to North Korean engagement and the limitation that presidents can only serve one term have often led to major policy overhauls by each new administration.[27] This lack of bipartisan agreement makes stable progress in inter-Korean ties very difficult, and may have influenced Kim Jong Un's decision to give it up altogether.[28] An optimistic suggestion on this note is that the Two Korea line intends instead to open up for inter-Korean diplomatic normalisation.[29]

Another motive could be prioritisation of the state's political survival. In the December speech, Kim cited the ROK constitution's description of the Korean Peninsula as South Korean territory and Seoul's goal of "unification under liberal democracy" as proof that it aims to collapse and absorb the DPRK. In the January speech, Kim stated that North Korea's military upgrading is "not a means of pre-emptive attack for realising unilateral reunification but. . . for legitimate self-defence." Han Ki-bum suggests that abandoning the unity ideal is part of a defensive strategy that expresses an "open admission of defeat" in the unification competition.[30] Cheon Yeong-woo similarly argues that Kim's speeches imply the message, "if we give up unification, you [Seoul] should too, and leave us alone."[31] Motin points out that states that plot to annex another tend to promote shared destiny-discourses, which is in opposition to Kim's emphasis on separate statehood.[32] Moreover, recent evidence shows that North Korea is fortifying its boundary in the DMZ, indicating that it wants no one, including its military, to cross into South Korea anytime soon.[33] This interpretation suggests that provocations against the South may decrease over time, in order to focus on "decoupling" the two Koreas. However, the ongoing intensification of war preparations runs counter to a purely defensive interpretation. If policy realignment and survival were the primary motives, declaring the ROK a separate country without declaring it enemy number one would appear a less aggressive approach better suited to defensive purposes.

A follow-up interpretation is that formalising the notion of the two Koreas as separate states is necessary for North Korea to revise its territorial boundaries. The focus on territorial sovereignty, particularly in the maritime domain, alongside the emphasis on the contested nature of the Northern Limit Line (NLL, the inter-Korean sea border) stands out as unusually specific in recent North Korean rhetoric. The DPRK has always challenged the NLL, declaring its own West Sea Military Demarcation Line in 1999, followed by the West Sea Passage Order in 2000, and the Security Demarcation Line in 2007 (these claims are combined as the Western Borderline in the map below).[34] Yet, the state has ramped up its criticism lately. On January 15, Kim warned that "the illegal NLL. . . can never be tolerated," threatening counteraction "if the ROK violates even 0.001 millimetre of our territorial land, air, and waters."

It is true that the legal status of the line is ambiguous.[35] Unlike the Military Demarcation Line (MDL, the land border), the NLL is not regulated in the Armistice Agreement but was established by the UN Command as a guideline to prevent South Korean vessels from venturing too far north. Although South Korea argues that Pyongyang's compliance to the NLL as the de facto maritime border over the past seven decades gives it official status, the ROK itself does not legally define the NLL as a territorial boundary line since these apply only to "legitimate independent states" (which North Korea is not). In this way, the NLL issue is intertwined with the unification paradigm since the understanding of the other as an illegitimate state complicates claims to territorial sovereignty. Pyongyang may thus have concluded that officially recognising the South as a foreign country, not as a divided part of one Korea, is necessary to legitimise its territorial contestation.

Possible motives for doing this include tactical benefits for defensive and offensive military action.



Map 1. Map of the contested zone in the West Sea.
Source: Per Wikström, FOI

Pyongyang refers to its right to "reliably safeguard the economic zone of the DPRK and firmly defend militarily the national interests of the country" in claiming waters further south than the NLL.[36] Although the DPRK does not challenge South Korea's claim over the five islands within the contested zone, the proposed corridors connecting the islands to ROK waters are extremely narrow, and if enforced would strictly limit the movement of local residents, fishermen, and the ROK navy, to avoid risking clashes with Northern patrols.[37] In a press statement, the vice minister of defence claimed that "various warships of. . . the ROK are frequently crossing our maritime border" and threatened counteraction "if the ROK refuses to respect the maritime border declared by the DPRK," indicating that the North may begin to enforce its borderline.[38] Increased pressure tactics in the West Sea also imply a possibility of near-future conflict in the contested zone, with notable actions such as firing artillery into the waters near Yeonpyeong Island for three days, jamming GPS signals near the NLL, revealing new naval assets and anti-ship missiles, and focusing on theatre-range missiles in recent missile tests.[39]

These circumstances have led analysts to identify the five South Korean islands along the NLL as probable targets for DPRK military action motivated by territorial contestation.[40] Although Terry finds no indication that Kim is preparing for a major attack, a deployment of naval assets to enforce the Western borderline may nonetheless include smaller-scale attacks or confrontations.[41] Lee Ki-dong assesses that grey-zone provocations that allow North Korea to deny accountability, for example by using drones, will be the most likely tactic.[42] Han Ki-bum suggests that confrontations could occur this year or in the first half of 2025, possibly timed with the US presidential election or an upcoming parliamentary session expected to enshrine the maritime borderline in the DPRK constitution.[43] Jun Bong-geun predicts a limited attack can happen "anytime."[44] Ward notes that minor incidents can escalate rapidly in today's tense geopolitical climate: Seoul's stated intention to retaliate "strongly until the end" if the DPRK repeats a "Yeonpyeong scenario" (referring to the 2010 incident) raises the risk that a confrontation escalates beyond intentions.[45]

A third interpretation of the policy shift is that North Korea remains committed to seizing control over the whole peninsula but is temporarily shelving the idea to pursue other interests while waiting for more favourable circumstances. Scholars have previously argued that

North Korea will maintain a "deep-seated commitment" to achieving unification as long as the Korean conflict remains unresolved.[46] According to Kim's January speech, the KPA is preparing for a "great revolutionary event," a phrase previously used to describe war with the South. Yang and Easley suggest that North Korea's goal to subjugate the South remains unchanged on an intergenerational scale, and Kristof suggests that incidents in the West Sea are rehearsals for a major provocation.[47] However, initiating a major attack does not appear an attractive option for Kim *at present*. Insufficient military capabilities are one reason for Kim to hedge his bets, as pointed out by Lankov, while others note that the legal and moral frameworks necessary to justify a large-scale offensive are currently missing in North Korean society due to the longstanding promotion of peaceful unification.[48]

While the legal preconditions can be created relatively quickly — Kim Jong Un has called for the constitution to be rewritten to allow the DPRK to "completely occupy" ROK territory during war — it will take time to alter public opinion on a structural level. Today, Korean unity enjoys significant popular support: as many as 95 percent of North Koreans believe unification is necessary, and in some surveys ethnic unity surpasses practical reasons, such as gaining a better standard of living.[49] Although KPA soldiers generally feel proud of the leader's policies, the available evidence does not suggest that the military feels less strongly about Korean kinship.[50] This tension between leadership priorities and citizen attitudes renders a large-scale attack on the ROK improbable, the issue of military capabilities aside. Nonetheless, forcible unification could remain on Pyongyang's back burner and make a comeback when the international and domestic political contexts allow.

Regime survival

The survival of the Kim family regime is a vital interest that could motivate military action. Even though Kim Jong Un's rule appears stable, he faces both internal and external threats that require continuous monitoring. Starting with external threats, North Korea views a surprise attack by the United States disguised as an exercise as its primary existential threat, a view held since the Korean War. Since 1955, the ROK and the United States have conducted joint military exercises, which North Korea consistently condemns as "invasion rehearsals" and occasionally responds to with counter-provocations. Analysts have previously concluded that these belligerent responses can be "logically inferred" as antagonistic messaging, given that the US-ROK alliance does not intend to attack the DPRK. For this reason, analysts have argued that Pyongyang has a political, but not practical, need for the recently inked Russian defence alliance.[51]

However, North Korea sees a US-led (and ROK-supported) attack as fully plausible, perhaps even probable, if internal stability should appear weak. Portrayals of the United States as an aggressive warmonger are a common theme in state media, which certainly serves propaganda purposes but also reflects a deep suspicion of US intentions. One scholar recalls that daily life in Pyongyang freezes during large US-ROK exercises, "as though the country was on the verge of being attacked", suggesting North Korea's criticism is rooted in a genuine anxiety.[52] Without reliable intelligence on US-ROK activities during the exercises, North Korea cannot confirm the drills' non-offensive nature, causing significant psychological pressure.

Under Kim Jong Un, reactions to US-ROK exercises have become more vehement, including the issuing of mobilisation orders and declarations of state of war in 2011, 2013, and 2015.[53] While this suggests that no military action would ensue if similar orders were issued today, current circumstances are different. In the past two years, the joint drills have expanded in scope, duration, and the assets deployed. President Yoon's efforts at reconciliation with Tokyo have led to the first-ever US-ROK-Japan exercises, worsening the North's perception of encirclement. Extended border buffer zones established in 2018 were withdrawn in November 2023, leading both sides to resume military activities near the border.[54] Meanwhile, President Trump's consideration of a "Bloody Nose"-strike on the DPRK's nuclear facilities in 2018, followed by the failed negotiations in 2019, likely reinforced Kim's impression of Washington as fundamentally untrustworthy.[55] Further, the Biden administration's frequent threats to "end" North Korea if it uses nuclear weapons likely strikes Kim as inconsistent with the United States's simultaneous claims of non-hostile intent. Experts suggest that this year's increased security at public events indicates Kim is ever more concerned about external threats to his personal safety.[56]

A first interpretation of the policy pivot against the background of North Korea's security environment is that it is part of a proactive policy response to deter the region's escalating tensions. In the current

risk situation, termed the "new Cold War" by DPRK state media, Pyongyang may feel cornered and fearful that perceived US-led hostilities jeopardise the regime's survival. Kim Jong Un cited the "special environment," that is, the proximity of the "most hostile state" [ROK] and "the regional situation. . . soaring due to the US-led escalation of military tensions," in January, as motivating increased war preparations. Kim's speech highlights the North's resolve to deter US-ROK provocations and respond *if necessary*. The line, "we do not want war, but we also have no intention of avoiding it" captures the tone of the speech, which although hostile conveys a strong appeal to the US-ROK alliance to consider Pyongyang's security concerns.

A possible motive for the policy shift, therefore, is to gain an improved deterrence posture to increase the chances that North Korea will not need to confront its adversaries militarily at all. Calling South Korea the principal enemy fuels the debate on America's commitment to protecting Seoul, potentially weakening the alliance.[57] Although North Korea possesses intercontinental ballistic missiles that could probably reach mainland United States, there are several unknowns regarding its capability to deliver nuclear warheads.[58] Kim may believe his threats are more credible if they target the Korean Peninsula, which is well within range of the North's most credible capabilities, such as artillery and nuclear-capable short-range ballistic missiles.[59] White presents the controversial take that Pyongyang may even want to encourage Seoul to develop nuclear weapons to undermine the United States's strategic position in East Asia.[60]

A second interpretation offered by taking recent statements at face value is that the DPRK is preparing for first-strike offensive action against South Korea, facing its predicaments head-on. Recent statements explicitly refer to an upcoming war against the ROK, with Kim stating that exercises prove the military's "strength and capabilities in a real war situation" and "ability to strike the enemy's capital."[61] On seven occasions since 2022, state media has depicted Kim Jong Un discussing military plans next to maps of the ROK.[62] In May, state officials asserted that a weapons test "clearly demonstrates" the state's "capability to conduct even a pre-emptive strike" on South Korea.[63]

But would North Korea pursue offensive action for purposes of regime survival? Conventional wisdom has it that the military power imbalance between Washington and Pyongyang deters the DPRK from making the first move. Observers have dismissed past North Korean threats based on the assumption that Pyongyang knows it risks facing crushing retribution by initiating a conflict it cannot win; Lankov sees a North Korean attack today as improbable for this reason.[64] In this interpretation, regime survival interests clearly cannot motivate offensive ambitions and would imply that the statements primarily serve rhetorical purposes, or another interest altogether. In other words, the evidence does not suggest that, under normal circumstances, Pyongyang will initiate war.

However, the keyword here is "normal circumstances." The US-DPRK relationship differs significantly from that referred to in standard deterrence theories because the parties understand the conflict in different terms and have different thresholds for using military force in response to perceived threats.[65] Scholars suggest that the centrality of the Kim family's political survival makes the leadership highly risk-averse, predisposing them to view opponents as likely to attack during crises.[66] This increases the incentives for North Korea to overestimate threats and lean toward aggression when situations of limited information demand a quick response. Additionally, the South Korean defence strategy's aim of taking out the Northern leadership early on in a conflict further induces an urgency to interpret a threat situation correctly, inadvertently increasing the likelihood of misinterpretation and encouraging "use it or lose it" thinking.[67] Lacking the necessary capabilities for assured destruction of targets on the US mainland, the Korean Peninsula emerges as a strategic alternative target for offensive action in a crisis.

A third interpretation, therefore, is that the DPRK is signalling its preparedness to use nuclear weapons pre-emptively in a crisis, and that it perceives that there is an impending risk that such a scenario may soon arise. One significant change announced by North Korea in 2019 (with the collapse of US-DPRK negotiations) is how it views its nuclear program.[68] In 2013, North Korea passed legislation limiting nuclear use to "repelling [an] invasion or attack from a hostile nuclear weapons state and [to] make retaliatory strikes." In 2022, this was amended to allow first use and authorisation of an automatic nuclear launch, even against non-nuclear-weapons states, if the leadership faces an "imminent" threat. The updated doctrine could result in nuclear use in a broader set of circumstances, and much earlier in a

conflict. Although the decision power over nuclear weapons is at present likely reserved for the leader, Mount argues that continued emphasis by the US-ROK alliance on attacks on North Korea's leadership may prompt Kim to delegate authority, raising the risk of miscommunication and miscalculation.[69] Recent policymaking could thus signal that the DPRK is politically willing to use nuclear weapons not only as a "last resort" (primarily a deterrence measure), but also pre-emptively, in a "use it or lose it" situation, *if it perceives an imminent attack*.

Alongside external threats, the leadership must address threats to internal cohesion. North Koreans today are generally less politically conscious and loyal than before, challenging the regime's ability to overcome difficulties and achieve its goals of becoming an economically self-reliant and stable hereditary dictatorship.[70] One study indicates that a clear majority of North Koreans blame policy failures and poor leadership for the country's economic difficulties, and support for the costly nuclear weapons programme is declining.[71] For context, the country has the 18th lowest GDP per capita in the world and annually spends around 20–30 percent of its GDP on defence.[72] During the pandemic years, 2020–2022, the economy experienced negative growth, and in 2023 an estimated 45.5 percent of the population suffered from severe food insecurity.[73] Unfavourable opinions are increasing also among North Korea's elite — a critical demographic on which Kim relies to maintain power — and this group now represents a growing share of total defections.[74] Against this backdrop of domestic dissent, Kim Jong Un may turn to provocative foreign policy, military confrontation, and hostile behaviour in the international arena to deflect attention, shift blame, and justify policies to boost domestic solidarity.[75]

A fourth interpretation of the policy pivot, therefore, is that it seeks to stop unification from becoming *too* popular in these times of economic difficulty. North Koreans generally expect that unification would bring improved living standards to the North, at the same time as the regime has since 2020 sought to tighten social control at the grassroots level by adopting legislation with severe penalties targeted at eliminating South Korean cultural influence.[76] Kim Jong Un may be worried that widespread admiration of South Korean lifestyles combined with pro-unification attitudes will create a hotbed for regime criticism and undermine the government's ideological and political control, necessitating a decisive break with the ROK.[77] At the same time, South Korean officials suggest that the rejection of unification erases the heritages of Kim Il Sung and Kim Jong Il, possibly creating an "ideological vacuum," with the potential to worsen political instability in the short term since the Kim Il Sung bloodline is central to upholding Kim Jong Un's legitimacy as a ruler.[78] This could mean that continued demonisation of the ROK (and enforcement of DPRK socialist values), but not necessarily any military action, is to be expected.

A final but similar interpretation is that ramping up tensions and framing the ROK as a hostile actor allows Kim to rationalise the country's high military expenditure and convince internal audiences that economic hardship is necessary to overcome current security challenges. Lim finds that Kim's January 15 address (which is officially titled *On the Immediate Tasks for the Prosperity and Development of Our Republic and the Promotion of the Wellbeing of Our People*) emphasises the economy and welfare more than war, suggesting that addressing public economic grievances is actually the state's immediate interest.[79] Notably, Kim used the speech to launch a regional development initiative aiming to improve welfare in rural areas by building factories. More importantly, this project relies heavily on KPA labour. Aside from participating in regular training, the military's day-to-day tasks typically include agriculture and construction work.[80] In late January, Kim ordered the KPA to mobilise for implementing the development initiative and an official statement in March noted that North Korean soldiers are "too busy" doing construction to respond to US-ROK provocations.[81] It is anticipated that if genuine war preparations were afoot, this type of non-military work would cease; in other words, the KPA's ongoing involvement in regional development suggests business as usual.[82]

However, although state media praises the policy for promoting public welfare even in the "face of. . . nuclear war," the 2024 state budget does not allocate any boost in investment to rural regions.[83] This suggests that the leadership wants to give the impression that it prioritises the improvement of local livelihoods, but that the policy is only a publicity stunt to escape a crisis of confidence.[84] Given the high expectations set by state media, local residents may become more critical of Kim's leadership if the policy fails to improve the economic situation. In this case, it is possible that the leader would turn to unconventional confrontations

with ROK-US forces. A head-on way to rationalise the state's military spending and excuse its failure to deliver improved welfare could be to provoke a clash with the ROK and the United States to portray the incident as a defensive response. However, economic motives suggest that the leader would be cautious about instigating major hostile action, given that mobilising for conflict or war would be counterproductive to improving public welfare and economic growth. Yet, depending on the severity of the crisis of confidence, and if the support for the nuclear programme continues to drop, this could ultimately incentivise nuclear first-use to demonstrate the programme's utility.[85]

Negotiations leverage and nuclear acknowledgement

A final major North Korean strategic interest is securing status as an internationally recognised nuclear power, something that, if continuously denied, could motivate military action. While the nuclear weapons programme primarily serves deterrence and survival interests, it also signals international prestige and enhances the regime's foreign-policy position.[86] Notably, the United States and North Korea fundamentally disagree on the DPRK's nuclear status. While Washington (and the international community in general) views Pyongyang's nuclear programme as inherently illegal, North Korea sees nuclear weapons as a defensive right and itself as a de facto nuclear state. North Korea has displayed great determination to assert its nuclear status but, so far, diplomacy has not granted the desired result, possibly motivating Pyongyang to turn to other tools. At the same time, North Korean policymaking has always been pragmatic and its approach to international relations generally very opportunistic. For this reason, Kim may have identified that current instabilities in the international political environment are susceptible to manipulation that could help North Korea attain a stronger negotiating position. In a speech on February 8, Kim specifically articulated the Two-Koreas policy as linked to the DPRK's capacity to make proactive foreign policy, stating a need to "safeguard our dignity as a sovereign, independent, socialist country. . . managing [external affairs] in accordance with our national interests."[87]

One interpretation proposed by several analysts is that designating the ROK as a target for attack attempts to create a "crisis of nuclear war" on the Korean Peninsula ahead of the US presidential election.[88] The goal would be to urge US decision-makers to reprioritise North Korean engagement and bring about talks with a potential Republican administration, making it acknowledge North Korea as a nuclear weapons state, likely in return for nuclear arms control, but not full denuclearisation. This would both score prestige points for the regime and undercut the moral and legal basis for international economic sanctions that aim to counter the country's "unlawful" nuclear development. To exert maximum pressure, Kim may even conduct another nuclear test.[89] It would make sense for North Korea to push a war narrative for this purpose, as the escalation of crises has previously succeeded in creating favourable terms. Studies of North Korea's foreign policy vis-à-vis the United States from the 1990s to the mid-2010s reveal a pattern in which the DPRK gained favourable outcomes by deliberately escalating crises up to the point where escalation into war became plausible.[90] Moreover, some contend that by characterising the two Koreas as separate states locked in a "hostile" relationship, the North can distance itself from South Korea in the international arena, allowing Kim Jong Un to talk directly to Washington.[91] If this is North Korea's motive, provocations will likely become progressively aggressive, yet fall short of war, peaking in or around November 2024.

However, this interpretation assumes that North Korea is interested in returning to negotiations with the United States in the near future. Carlin and Hecker believe that North Korea's recent belligerence is dangerous precisely because Kim Jong Un has dropped the idea of positive engagement with Washington, having been forced to reconsider his policy options after 2019.[92] Moreover, Kim today enjoys increased diplomatic, economic, and possibly military cooperation with Moscow, which could mean that he will remain uninterested in the United States regardless of the election outcome, perhaps even becoming more militant to the extent that he perceives greater room for manoeuvre.[93] A National Intelligence Estimate assesses that military coercion, potentially including conventional attacks, is an attractive strategy for North Korea to intimidate its neighbours, extract concessions, and promote the regime's credentials.[94] If the United States does not recognise Pyongyang's willingness and capability to use nuclear weapons, it risks pressuring the regime to adopt even costlier, and potentially more aggressive, signals, for example, a nuclear test or major regional provocation.[95]

While North Korea traditionally has had a clear sense of how far it could go with its provocations without risking actual war,[96] support from like-minded partners may embolden Kim to push further, while the United States and South Korea today express a stronger will and preparedness to retaliate, making "escalate-to-deescalate" tactics a risky gamble.

Motives and military risks

This memo seeks to present a comprehensive overview of motives that may have inspired Kim Jong Un's decision to cut ties with South Korea. The regime's interest in unification, political survival, and enhancing its negotiation leverage as a nuclear power all offer possible explanations. Even though the policy shift was unexpected, it was not sudden, following as it did a period of deteriorating inter-Korean ties. Moreover, it coincided with a period of heightened existential anxiety from facing growing external and internal threats, as well as an international geopolitical environment susceptible to opportunistic manoeuvring. In sum, it is possible to interpret the Two Koreas policy as intending to achieve multiple offensive and defensive outcomes. Provocations vis-à-vis the United States and South Korea could therefore be set to increase *and* decrease.

Notably, the analysis shows that several motives share one common implication: that the policy overhaul is the first step in a longer-term strategic effort, even if the suggested time frame for when North Korea may take the next step, as well as what the next step *will be*, varies significantly between interpretations. In the short term, analysts on both sides of the defensive/offensive intent debate generally expect that fiery anti-ROK rhetoric and minor provocations will continue through this year and next year, if not for offensive purposes, then to enhance North Korea's deterrence posture, reinstate ideological control, and pressure US decision-makers. Meanwhile, analysts who perceive an offensive military intent expect that Kim Jong Un may use conventional force to enforce North Korea's maritime boundary claims in the West Sea, legitimise the state's military expenditure, and maximise its negotiating position, one in which Kim may go as far as testing or using a nuclear weapon.

While these predictions raise concern, the analysis does not find support for the idea that Kim plans to initiate a major attack, invasion, or war, anytime soon, as a large-scale offensive appears to be a much less appropriate tool for advancing any of the interests examined here, at least in the *current circumstances*. In a crisis situation, Pyongyang will likely calculate its

	Unification	Regime survival	International recognition
Motives for offensive military action	The Korean conflict remains unresolved	The centrality of the Kim family's survival incentivises offensive action early on in a conflict or crisis	Testing or using nuclear weapons for signalling to receive recognition as a nuclear state
	A desire to enforce revised maritime boundaries	Military action diverts attention away from internal problems, legitimises spending	Conducting a regional provocation to maximise pressure on the United States
Motives for defensive or non-military action	The state prioritises regime survival and/or other interests more	Target-shifting to improve deterrence posture	Tensions will only be ramped up as far as is beneficial for North Korea's negotiation posture [a]
	Forcible reunification does not resonate with public opinion, lacks legal basis	Power asymmetry with the United States de-incentivises first strikes in normal conditions	
		Reinstating ideological control and eradicating ROK cultural influence	
		War has negative effects on economic growth	

Table 1. A summary of possible motives for offensive and defensive intent.

(a) One critical variable here is North Korea's interest in returning to negotiations with the United States.

chances differently. It appears that the regime is preparing to make difficult decisions not only in the worst-case scenario, but earlier on in a conflict. Worryingly, the institutional barriers against using nuclear weapons early in a conflict are lower today than before, and the uncertainty regarding the regime's red lines for perceiving that a threat is imminent enough to justify nuclear first-use is a definitive concern.

As for long-term implications, Pyongyang's strategic direction remains ambivalent for the time being. Based on the available evidence, it seems that the new inter-Korean strategy uses hostility as a means to assert the DPRK's political autonomy, rather than seeking autonomy to justify increased hostility. At the time of writing, in July 2024, North Korea has not acted on any of its threats to use military force against ROK or US targets, although it has kept up a menacing rhetoric and engaged in grey-zone provocations, notably sending trash-carrying balloons into the South and conducting various missile tests. Based on this, one could be tempted to conclude that the unification-policy reversal is yet another case of talking big, doing little. However, the possibility that the perceived rhetoric-action gap is strategic, deliberately seeking to confuse or trick observers into misinterpreting North Korea's plans, cannot be excluded. Park Hyeong Jung suggests we must wait and see, as the significant scale and scope of the unification paradigm shift mean that the leadership needs time to work out organisational and strategic details before taking the next step.[97] For now, this analysis suggests that international policy responses entertain both military risks *and* the possibility of defensive and non-military intent. One such approach could be to remain attentive to irregular signals (for example, forward deployments of military assets in the West Sea, the KPA's cessation of non-military work, and spikes in public dissent), while being careful not to draw hasty conclusions about unexpected occurrences.

On a final note, a potentially offensive intent does not become a threat unless an actor has the military capability and opportune circumstances to act on it.[98] Further studies could analyse the ways in which North Korea's military capability and geopolitical opportunities enable or limit various military ambitions. Militarily, the offensive options available in Pyongyang's toolbox will increase with the quantitative and qualitative progress of the nuclear and missile programmes. Military build-up is therefore a significant driver of risk, and confidence in the deterrent effect of nuclear weapons could embolden the leader to consider more risky alternatives previously off the table. Although Pyongyang's activities along the NLL will remain a significant barometer of its intentions, the likelihood of offensive action against the ROK ultimately depends on Kim's willingness to risk US-ROK counteraction, his confidence in the KPA's naval and/or hybrid capabilities, and his judgement of good timing. Finally, the risk that unintended incidents escalate cannot be accounted for by North Korean intent alone. To avoid escalation of misunderstandings, all parties need to exercise caution. ■

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Endnotes

1 This memo follows North Korean spelling conventions when referring to DPRK individuals, i.e., presenting the given name without a hyphen (Kim Jong Un). When referring to ROK individuals, the name is presented with a hyphen (Yoon Suk-yeol). When citing Korean authors, the name is presented as it appears in the source. Titles of Korean sources in the reference list below have been translated into English by the author.

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