

The myth of South Korea's China pivot

South Korea is strengthening its US alliance while preparing for a more uncertain security future.

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Doubts have grown in South Korea in recent months about the reliability of the United States as an ally, following a series of US unilateral actions that suggest the US could sideline Seoul's interests if it suits its own priorities.

From a redeployment of US Patriot missiles and weaponry based in South Korea to the Middle East in March to support the Iran war, to US President Donald Trump's verbal threat in April to withdraw US troops from the Korean Peninsula and his forceful demand that Seoul "pays up" for US protection earlier in July 2025, the impression that many in South Korea are receiving is clear: US security guarantees may no longer be unconditional.

That has led many analysts to conclude, familiarly, that South Korea is getting closer to China as a result. It may appear so on the surface. Yes, President Lee Jae Myung may have emphasised pragmatic diplomacy and strategic autonomy. His outreach to Beijing, including reaffirming the "one-China" policy and calling 2026 a year of "restoration" in ties, suggests a thaw.

But this interpretation is inaccurate, because it reduces a complex foreign policy to a single US-China axis and misses the fact that Seoul has doubled down on the US-ROK alliance over the years when facing insecurity.

If anything, Seoul's hedging strategy in preparing for a world where US security guarantees are not forthcoming lies not in bending towards China but in building up its military capabilities and expanding its defence partnerships beyond the US with countries in other parts of the world.

STRONGER, NOT WEAKER, US-SOUTH KOREAN TIES

The fact that Korea is not hedging toward China is made explicit by Mr Lee himself.

In his 2025 speech at the Centre for Strategic and International Studies, he said that "the backbone of (his) pragmatic diplomacy centred on national interest is the ROK-US alliance".

He affirmed that South Korea "cannot act or make decisions that go against America's basic policy stance," essentially rejecting any balancing role or hedging policy under his administration.

He also vowed to increase Korea's defence budget as part of greater alliance burden-sharing and declared that "the golden era of the ROK-US



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alliance has yet to come."

Why is he re-emphasising the bilateral relationship with the US in these times?

The answer: What choice does he have? History shows South Korea has long recognised that the US has been the only viable security guarantor for Seoul.

Born out of the 1953 Korean War, the US-ROK alliance has provided a security guarantee for South Korea throughout the Cold War.

After the collapse of the Berlin Wall, when Seoul faced the twin security challenges of North Korea's menacing nuclear threats and China's increasing strategic and economic heft, Seoul chose to strengthen the US-ROK alliance.

Over the decades, and across successive governments, Seoul has purchased F-35 fighters, the THAAD system and other advanced military weaponry from the US, expanded joint military exercises with the US that included more frequent American strategic assets rotations on the

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peninsula, broadened the US-ROK alliance to economic and technological cooperation, and developed the US-ROK-Japan trilateral framework.

All these policy choices were aimed at strengthening and modernising the US-ROK alliance, not weakening or pivoting away from it.

MORE HEDGING

But South Korea has undoubtedly become increasingly concerned with growing US unilateralism and its implications for the US presence in Asia.

As a result, it has been preparing for an unlikely but highly consequential scenario where US security guarantees for Seoul may not be forthcoming by undertaking two strategies.

One is a greater emphasis on augmenting South Korea's national defence capabilities. South Korea is one of the world's leading tech and manufacturing powerhouses today, and boasts a highly capable defence industry.

To be sure, South Korea's military development has taken place within the confines of the US-ROK alliance.

But the fact that Seoul has never missed an opportunity to boost its own military capabilities indicates that it has sought more self-reliance for its national security.

In 2021, when the US lifted a longstanding restriction on South Korea's ballistic missile payloads, Seoul immediately began operational deployment of the Hyunmoo-5, a "Monster Missile" designed to carry a

warhead of up to 8 tonnes.

South Korea has also sought to acquire US nuclear propulsion technology and fuel, which Mr Trump gave the green light to in October 2025 when the US agreed for South Korean shipbuilder Hanwha to build nuclear-powered submarines at its shipyard in Philadelphia, Pennsylvania.

More recently, in February, the South Korea Defence Ministry pushed a special law for military nuclear use, designating it a national project and plans to build four to six 5,000-ton nuclear-powered submarines.

These qualitative upgrades to the South Korean defence capabilities and defence industry clearly signal that the South is preparing to take greater responsibility for its own defence.

A second strategy has focused on an expansion of ties beyond the US with other like-minded countries that share mutual interests and a common vision of upholding regional security.

This second prong has led Seoul to join a loose group, the NATO-IP4, comprising NATO countries and the four Indo-Pacific countries of Australia, Japan, South Korea and New Zealand; deepen its bilateral ties with South-east Asian countries including Singapore to strengthen supply chain resilience; actively search for new partners in South Asia and the Middle East; and make efforts to improve relations with neighbouring countries such as Japan, Russia and China so as to bring the regional temperature down.

Seoul's effort to improve its ties

with Beijing should be understood in this light, as part of this diversification strategy, rather than balancing or hedging behaviour.

If regional security remains, South Korea can carry on. But if the day should come when South Korea, in self-defence, needs to call on the US-South Korean alliance, and the US become unreliable or untrustworthy as an ally, South Korea would at least be somewhat prepared.

The real question is how far Seoul is prepared to push the logic of national defence and self-reliance.

It is not a far-fetched idea that South Korea might seek a nuclear umbrella of its own for further deterrence. We are living through a period where what was once unthinkable is no longer simply a figment of imagination but a real possibility.

THE SECURITY DILEMMA

The irony, however, is that the sum of such actions may not actually improve South Korea's sense of security.

While South Korea's military build-up will add to its defence capabilities, it could trigger a regional arms race not only with North Korea but also with other countries such as China and Japan.

And if Seoul ever decides to go nuclear, it will begin a domino effect in East Asia, forcing other countries such as Japan to follow suit and making East Asia a *sui generis* nuclear region.

This is a classic case of what international relations scholars call the security dilemma, a

situation where military actions taken to improve one's own security invite others to take similar actions to improve their security, thereby causing a vicious cycle of an arms race and a spiral of mistrust.

The end outcome is that no one's security would improve while military tensions and stakes have increased.

Perhaps, the real significance that the foregoing discussion reveals is the indispensability of the US as the traditional public goods provider.

No matter what individual countries do to improve their own national security, outcomes are less optimal than a regional order where a benign hegemon provides a security umbrella and creates a stable balance of power.

If anything, recent complaints and criticisms levelled at the second Trump administration and its unilateralism reveal how critical the US has been in maintaining regional peace and security, upholding the essential rules of international trade, and acting as the final arbiter and enforcer of rules, albeit in a way that some will say has not always been fair or just.

Without a benign US, the policy choices taken by South Korea to improve its national security will likely be a common path travelled by many others, with potentially destabilising consequences for the region.

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