

ISSUE BRIEF

Executive Summary

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North Korea's Recent Conventional Military Build-Up and Its Implications for the East Asian Security Landscape

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Until recently, discussions of North Korea's military threat have focused primarily on its nuclear capabilities. Since conducting its first nuclear test in October 2006, North Korea has advanced its nuclear program through six tests and, by the 2020s, has developed tactical nuclear weapons and a variety of delivery systems capable of targeting the Korean Peninsula. However, it is important to note that over the past two to three years, North Korea has also been devoting considerable attention to the modernization of its conventional forces alongside its nuclear arsenal.

North Korea's Conventional Force Build-Up: Rhetoric vs. Reality

1. Current Status of Major Conventional Force Development

Since Kim Jong Un came to power in 2011, North Korea's military development has focused on advancing its nuclear and missile capabilities, while conventional forces were largely limited to replacing outdated equipment and strengthening special operations units. However, beginning with the Eighth Party Congress in 2021, Pyongyang outlined modernization tasks such as military reconnaissance satellites, unmanned reconnaissance drones, and the development of SLBMs and ICBMs, signaling its intent to reduce the imbalance between nuclear and conventional forces. Despite its limited defense budget, North Korea has also pursued unprecedented enhancements in naval and armored capabilities. This represents a meaningful shift in its force development, extending beyond platforms for nuclear delivery to notable changes in the conventional domain as well.

2. *Emerging Questions: Funding Sources and Actual Capabilities*

Questions have been raised regarding both the funding and the actual performance of North Korea's recent conventional force build-up. Since the 2010s, North Korea's economic growth has been largely stagnant or negative, with three consecutive years of contraction during the COVID-19 period. Although trade with China and Russia resumed in 2023 and returned the economy to positive growth, the country's capacity for large-scale military investment remains limited. At the same time, Kim Jong Un has had to prioritize regional economic development to manage public sentiment, making it difficult to pursue defense spending alone. This raises doubts about how sufficient resources are being secured.

Moreover, the combat effectiveness of the weapons such as Cheonma-2 tanks, claimed to feature active protection systems and guided missile capabilities has not been verified, with incidents such as the recent failed launch of a naval destroyer *Kang Kon* suspensions of structural flaws. Advanced systems like tanks and warships also require technological capabilities in metallurgy, electronics, and shipbuilding, which should be evident in civilian industries. However, there is little sign of such applications in North Korea, and the country lacks experience in building large civilian vessels. This raises fundamental questions about whether North Korea's conventional force build-up amounts to more than a façade.

Could Closer DPRK-Russia Ties Become a Decisive Turning Point?

North Korea, constrained by its own limited capacity to modernize conventional forces, has sought a sustainable patron through its accelerated alignment with Russia since 2023. The "Comprehensive Strategic Partnership" treaty signed in June 2024 provided a formal basis for arms transactions, and North Korea's ongoing construction of a nuclear-powered submarine suggests possible Russian support in design and materials. For Russia, North Korea's provision of troops, missiles, and ammunition has been critical to the Ukraine war and to replenishing depleted stockpiles afterward, giving Russia strong incentives to assist North Korea's conventional build-up. Still, even with such support, it is unlikely that North Korea could overturn the conventional force balance with South Korea within two to three years.

Russia's support for North Korea face limitations as sanctions and economic strain constrain Russia's ability to provide sustained financial assistance; supplying cutting-edge weapons is restricted by cost, contractual obligations, and shortages. As a result, even with deepening ties, meaningful modernization of North Korea's conventional forces will likely to take at least five years. Russia may try to accommodate some of Pyongyang's demands, but nuclear technology transfers remain too costly, and China, wary of losing influence, could further constrain Russia's provision of military support to North Korea. Therefore, North Korea's conventional build-up warrants attention, but its threat should not be overstated.

Implications of North Korea's Conventional Forces for Foreign Policy: Beyond the Korean Peninsula

North Korea's recent conventional force build-up, even if it does not produce immediate military effects, carries significant foreign policy implications.

First, by strengthening its conventional forces, North Korea has revealed its intent to transform its nuclear arsenal into an operationally usable capability, creating conditions to implement a "nuclear shadow" strategy from the outset of conflict. In particular, by securing assets such as drones to prepare for future warfare, Pyongyang is broadening its range of military options against South Korea while showcasing its readiness to use nuclear weapons on the Korean Peninsula at any time. Kim Jong Un's statement that he would declare the "parallel development of nuclear and conventional forces" at the Ninth Workers' Party Congress, expected in early 2026, is likewise interpreted as a demonstration of intent to maintain a posture for the actual use of nuclear weapons.

Second, the strengthening of North Korea's conventional forces, especially its naval power, signals an ambition to expand its role beyond the Korean Peninsula. Kim Jong Un outlined his vision for a "blue-water operational fleet," stressing global operational capability, and Pyongyang has already demonstrated influence outside the peninsula by supplying troops and weapons to Russia in the Ukraine war. Through this, North Korea has reinforced its presence as a destabilizing factor at both the regional and global levels. Moreover, by leveraging cooperation with China and Russia, it has elevated its perceived strategic value in the Indo-Pacific and on a global scale. Building on this, Kim Jong Un seeks to isolate South Korea within the region and establish direct ties with the United States. His appearance alongside Xi Jinping and Vladimir Putin at China's Victory Day military parade in Beijing was even described as having elevated him into the ranks of a "global actor."

Third, the expansion of North Korea's regional and global role can also serve to strengthen internal cohesion. Kim Jong Un has been eager to elevate North Korea's status from that of a failed regime to a legitimate state-level actor and regional power. By strongly criticizing U.S. global strategy, he seeks to project the image of an international competitor. If Pyongyang succeeds in demonstrating the potential value of its military activities, it could enhance its standing in the China-Russia-DPRK triangle. This, in turn, would allow Kim Jong Un to showcase himself as the leader who realized the long-standing goal of building a "strong and prosperous nation," a narrative likely to become a centerpiece of propaganda for the 80th anniversary of the Worker's Party's founding and the Ninth Party Congress.

Recommendations on ROK's Policy Response

To respond to North Korea's conventional force build-up, South Korea needs to pursue three policy directions.

First, while maintaining the ROK-U.S. alliance's core objective of deterring and defending against North Korea, South Korea should adopt a more proactive approach in expanding the role of the alliance beyond the Korean Peninsula. This would not only counter North Korea's broadened strategic outlook but also enhance the long-term vitality of the ROK-U.S. alliance and strengthen South Korea's strategic value.

Second, although the likelihood of North Korea rapidly expanding its conventional forces in the short term is low, South Korea must recognize that in the medium to long term, the dynamic of "qualitative superiority for South Korea, numerical superiority for North Korea" could shift. South Korea's qualitative edge has been eroded by two decades of "Defense Reform" and "Defense Innovation," and it is essential to fully implement modernization plans and secure adequate defense spending to remain one or two generations ahead of the North in key systems. Above all, priority must be given to the early completion of the "three-axis system" to counter the North's nuclear threat. South Korea should reduce overreliance on American nuclear assets by strengthening its own capabilities. The three-axis system, encompassing early warning, C4ISR, and diverse strike options, will also help preserve and enhance South Korea's edge even in the face of North Korea's conventional build-up.

Third, North Korea's conventional build-up is ultimately linked to its intent to narrow South Korea's strategic space and reinforce its "*Tong-mi-bong-nam* (engaging directly with the United States while isolating South Korea)" approach. While efforts to ease inter-Korean tensions and reopen dialogue channels are desirable, they must not come at the expense of undermining ROK-U.S. cooperation. Thus, while maintaining the principle of resolving the North Korean nuclear issue through peace and dialogue on the Korean Peninsula, Seoul must firmly uphold the goal of "Complete Denuclearization of North Korea" and develop joint alliance response plans against North Korea's conventional build-up. In particular, South Korea should avoid creating the impression that it is pushing for early U.S.-DPRK talks, even if Washington shows some flexibility.

About the Author

Dr. Cha Du Hyeogn is a North Korea Study expert who has shown various research performances on North Korean Politics and Military, U.S.-ROK Alliance, and National Crisis Management, etc. He is the Principal Fellow of Asan Institute for Policy Studies, holding an additional post as Visiting Professor of Graduate Institute of Peace Studies in Kyung Hee University. He also has served as Adjunct Professor of University of North Korean Studies (2017~2019), Senior Foreign Affairs Advisor to the Governor of GyeongGi Provincial Government (2015~2018), Visiting Scholar of Korea Institute for National Unification (2015-2017), the Executive Vice President of the Korea Foundation (2011~2014). Before these careers, he was also a Research Fellow at the Korea Institute for Defense Analyses (KIDA, 1989~2012) and the Acting Secretary for Crisis Information to the ROK President Lee Myung Bak (2008). He has worked more than 20 years in KIDA as various positions including Director of Defense Issues Task force (2005~2006), Director of Arms Control Researches (2007), Director of North Korea Studies (2009). Dr. Cha received his M.A. and Ph.D. degree of Political Science from Yonsei University. He has written more than 100 research papers and co-authored books on diverse fields of security and International relations. He has advised for various governmental organizations.

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