

# Under What Conditions Might South Korea Go Nuclear? Alliance Credibility, Domestic Pressures, and the Limits of Extended Deterrence

Alpha Traore, *Tufts University*

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## **Abstract**

Extended deterrence has long enabled U.S. allies to forgo nuclear weapons while remaining secure under the American nuclear umbrella. As adversaries acquire the ability to threaten the U.S. homeland and alliance politics grow more volatile, the credibility of these guarantees has come under increasing strain. This article examines the conditions under which a non-nuclear U.S. ally may move toward nuclear acquisition, using South Korea between 2022 and 2025 as a critical case. It evaluates two competing, though not mutually exclusive, mechanisms shaping nuclear decision-making: alliance credibility and domestic political pressures. Drawing on public opinion data, elite political discourse, alliance behavior, and regional security developments, the article finds that while both mechanisms have intensified, neither has yet produced an irreversible shift toward nuclear proliferation. Instead, South Korea has adopted a strategy of nuclear hedging, expanding nuclear-adjacent capabilities while remaining formally committed to the Non-Proliferation Treaty. The findings suggest that nuclear restraint within the U.S.-led order remains resilient but conditional, dependent on sustained alliance reassurance and domestic restraint. More broadly, the South Korean case highlights the fragility of nonproliferation under conditions of strategic uncertainty.

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## Introduction: Strategic Uncertainty and the Conditions for South Korean Nuclear Acquisition

The renewed debate over nuclear weapons in the Republic of Korea (ROK) is the product of major structural, technological, and political shifts in East Asia since the early 2000s. North Korea's development of thermonuclear warheads and intercontinental ballistic missiles (ICBMs) capable of striking the continental United States has created a new layer of uncertainty within the U.S.–ROK alliance.<sup>1</sup> These capabilities raise a fundamental question that has long troubled South Korean leaders: would the United States risk nuclear retaliation against its own territory to defend Seoul? This question lies at the center of South Korea's contemporary security dilemma. Despite facing an existential threat from the Democratic People's Republic of Korea (DPRK), Seoul has not developed an indigenous nuclear arsenal. Since the early 1970s, successive South Korean administrations have relied on the American nuclear umbrella as the foundation of their national security.<sup>2</sup>

However, changes in the regional balance of power, combined with the rapid expansion of North Korea's nuclear and missile programs, have led many South Korean policymakers and strategists to reassess the credibility of U.S. commitments.<sup>3</sup> In January 2023, President Yoon Suk-Yeol publicly stated that his administration might consider building nuclear weapons if the North Korean threat continued to intensify.<sup>4</sup> His statement echoed a warning from President Park Chung-Hee almost fifty years earlier and highlighted a recurring strategic concern: under what conditions might the ROK conclude that reliance on American protection is no longer sufficient and develop its own nuclear weapons?

This paper addresses that question by evaluating two competing hypotheses that offer distinct explanations for potential nuclear decision-making in South Korea. The first hypothesis focuses on alliance credibility. It posits that a decline in the perceived reliability of U.S. extended deterrence—a situation in which a state threatens military retaliation to deter another state from using force against one of its allies—will drive Seoul toward the actual pursuit of nuclear weapons, particularly once North

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<sup>1</sup> Niv Farago, "Why US Extended Deterrence to South Korea Might Not Work," *Asian Affairs* 55, no. 4 (2024): 648–69, <https://doi.org/10.1080/03068374.2024.2426138>.

<sup>2</sup> Farago, "Why US Extended Deterrence," 653–654.

<sup>3</sup> Lami Kim, "South Korea's Nuclear Hedging?" *The Washington Quarterly* 41, no. 1 (2018): 115–33, <https://doi.org/10.1080/0163660X.2018.1445910>; Jeheung Ryu, "Rethinking Nuclear Deterrence in a Shifting Global Order: Theoretical, Empirical, and Policy Perspectives," *Asian Journal of Peacebuilding* 13, no. 1 (2025): 1–17, <https://doi.org/10.18588/202505.00a603>.

<sup>4</sup> Farago, "Why US Extended Deterrence to South Korea Might Not Work," 648.

Korea can threaten the U.S. homeland.<sup>5</sup> Under this view, if South Korean leaders believe that Washington may be unwilling to risk nuclear retaliation on Seoul's behalf, they may conclude that reliance on American protection is no longer viable. South Korea would then begin taking concrete steps toward nuclear armament, such as altering domestic legal restrictions, redirecting its advanced nuclear sector toward military ends, or publicly signaling intent to proliferate.<sup>6</sup> The second hypothesis emphasizes domestic political pressures. It argues that democratically elected leaders in Seoul may pursue an independent nuclear deterrent when domestic political incentives create strong pressures for nuclear acquisition.<sup>7</sup> Under this view, the decisive shift occurs not when alliance credibility collapses, but when domestic constituencies view nuclear weapons as essential to national security and political leaders conclude that opposing these demands carries political risk.<sup>8</sup>

Understanding the relative weight of these mechanisms matters for contemporary debates in international security. If alliance credibility proves decisive, then the future of East Asian stability hinges on the consistency of U.S. commitments and the pace of North Korea's strategic modernization. If domestic politics prove more influential, then Seoul's nuclear future will depend on internal political developments, public attitudes, partisan competition, and bureaucratic dynamics. However, these perspectives are not mutually exclusive. In practice, South Korean nuclear decision-making may reflect an interaction of the two mechanisms. External threats may reshape the public's perception of security, thereby intensifying domestic pressures on political leaders. Conversely, domestic demands for autonomy may amplify the effects of alliance credibility concerns. The theoretical framework developed here, therefore, treats both hypotheses as viable and potentially overlapping pathways toward nuclear acquisition. In both cases, the consequences are far-reaching: nuclear acquisition by the ROK could undermine the global non-proliferation regime, precipitate similar debates in Japan and Taiwan, and fundamentally alter the balance of power in East Asia.

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<sup>5</sup> Paul K Huth, "Conceptualizing Deterrence," in *Extended Deterrence and the Prevention of War* (Yale University Press, 1991), 16.

<sup>6</sup> Kim, "South Korea's Nuclear Hedging?" 115.

<sup>7</sup> Dong-Joon Jo and Erik Gartzke, "Determinants of Nuclear Weapons Proliferation," *Journal of Conflict Resolution* 51, no. 1 (2007): 167-94, <https://doi.org/10.1177/0022002706296158>.

<sup>8</sup> Jeheung Ryu, "Rethinking Nuclear Deterrence in a Shifting Global Order: Theoretical, Empirical, and Policy Perspectives," 3; Scott Curtice, *Why Do States Build Nuclear Weapons? Proliferation Models as Concurrent Pressures on a State*, Wright Flyer Paper, no. 82 (Muir S. Fairchild Research Information Center, Air University Press, 2021), 63-64.

The core argument of this paper is that present trends provide partial confirmation of both hypotheses, but neither mechanism is yet sufficient to compel nuclear acquisition. Between 2022 and 2025, abandonment concerns deepened as North Korea expanded its capabilities and U.S. political signals became less predictable, while domestic pressures created a permissive political environment for nuclear debate.<sup>9</sup> These dynamics pushed Seoul toward a more assertive hedging posture, reflected in expanded strategic consultations, growing interest in nuclear-relevant technologies, and the mainstreaming of elite nuclear discourse. Yet they have not produced an irreversible shift toward nuclear weapons. The evidence suggests that actual proliferation would require both mechanisms to reinforce one another rather than operate in isolation.

The remainder of the paper proceeds as follows. The next part sets out the theoretical foundations of both hypotheses, detailing their independent variables, dependent variables, and causal mechanisms. The third part presents an empirical evaluation using qualitative case evidence, public opinion data, alliance behavior, and regional nuclear trends. The conclusion assesses which hypothesis better explains the conditions under which South Korea might pursue nuclear weapons and discusses the broader implications for deterrence and security in East Asia.

## Theoretical Overview and Methodology

The debate over whether South Korea might pursue an indigenous nuclear arsenal sits at the intersection of several literatures in international security. Scholars have long examined why some states choose to acquire nuclear weapons while others refrain, offering competing explanations that emphasize external threats, alliance politics, domestic political incentives, and normative pressures.<sup>10</sup> The existing literature on nuclear proliferation provides two distinct logics for understanding potential South Korean nuclear decision-making: alliance-based theories that stress abandonment fears, and domestic politics theories that put a particular accent on the role of public opinion and electoral incentives when it comes to democratic

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<sup>9</sup> Farago, "Why US Extended Deterrence to South Korea Might Not Work," 648; Emmanuelle Maitre, "Towards a South Korean Nuclear Weapon? Political and Strategic Considerations," *Foundation for Strategic Research*, July 18, 2025, <https://www.frstrategie.org/en/programs/korea-security-and-diplomacy-program/towards-south-korean-nuclear-weapon-political-and-strategic-considerations-2025>.

<sup>10</sup> Scott Curtice, *Why Do States Build Nuclear Weapons? Proliferation Models as Concurrent Pressures on a State* (Air University Press, 2021), 57–85.

foreign policy.<sup>11</sup> These bodies of scholarship guide the development of the two hypotheses evaluated in this paper and establish the scope of conditions under which each mechanism might influence Seoul's future nuclear behavior.

## Alliance Credibility and Abandonment Risk

The first hypothesis is grounded primarily in alliance politics and security-based theories of nuclear acquisition. In these approaches, the credibility of a patron's security guarantee is central to a client state's decision to pursue nuclear weapons. The logic of mutual nuclear deterrence suggests that extended deterrence becomes less credible when adversaries develop capabilities that threaten the patron's homeland, a dynamic captured by Scott Sagan's "security model."<sup>12</sup> For instance, during the Cold War, France and the United Kingdom pursued independent nuclear capabilities partly due to uncertainties about U.S. commitments in Europe, given the Soviet Union's capabilities to retaliate against the United States.<sup>13</sup> Glenn Snyder's work on alliances further clarifies how abandonment fears intensify when an ally faces high potential costs in fulfilling its commitments.<sup>14</sup> In an extended deterrence relationship, this dynamic is particularly acute. Scholars of East Asian security describe this challenge as the "decoupling problem," in which the ability of North Korea to threaten the United States with nuclear retaliation raises doubts in Seoul about whether Washington would intervene in a major crisis.<sup>15</sup> Within this theoretical framework, the central mechanism is straightforward: as abandonment fears grow, a state may seek nuclear weapons to restore its autonomy and reduce reliance on uncertain external guarantees.

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<sup>11</sup> Etel Solingen, *Nuclear Logics: Contrasting Paths in East Asia and the Middle East* (University Press, 2009), 24, 84; Curtice, *Why Do States Build Nuclear Weapons? Proliferation Models as Concurrent Pressures on a State*, 67–69; Hyun Joo Cho and Jinwon Lee, "Understanding South Korean Public Attitudes toward Nuclearization: Trends over a Decade through External, Domestic, and Individual Perspectives," *Korea Observer - Institute of Korean Studies* 55, no. 4 (2024): 573–624, <https://doi.org/10.29152/koiks.2024.55.4.573>.

<sup>12</sup> Kim, "South Korea's Nuclear Hedging?," 119–120.

<sup>13</sup> Curtice, *Why Do States Build Nuclear Weapons? Proliferation Models as Concurrent Pressures on a State*, 58.

<sup>14</sup> Glenn Herald Snyder, *Alliance Politics* (Cornell University Press, 2007), 1–39.

<sup>15</sup> Terence Roehrig, *Japan, South Korea, and the United States Nuclear Umbrella: Deterrence after the Cold War* (Columbia University Press, 2018), 137–138.

## Observable Implications, Confirming Indicators, and Disconfirming Indicators

If the external threat–alliance logic is correct, we should expect observable patterns signaling that South Korean leaders interpret gaps in U.S. deterrence credibility as intolerable risks. A confirming pattern would involve historical moments in which South Korean leaders responded to doubts about U.S. commitments by initiating nuclear programs or hedging activities. Hedging refers to a policy or strategy of preserving (or projecting the appearance of preserving) a latent indigenous capability to quickly assemble or deploy a nuclear weapon, typically without openly crossing the threshold into declared possession.<sup>16</sup> These reactions would not be ambiguous: they would include concrete steps such as authorizing sensitive fuel-cycle experiments, exploring reprocessing technology, or publicly expressing interest in nuclear options after major North Korean capability advancements. Another confirming indicator would be explicit statements from political elites across ideological lines expressing doubts about the reliability of U.S. protection and linking those doubts to calls for nuclear latency or dual-use nuclear technologies that could be repurposed for weapons development. Additionally, a confirming sequence would include measurable governmental investments in technologies with military nuclear relevance, such as enrichment for naval propulsion, advanced missile systems, or hardened command-and-control infrastructure, coinciding with periods in which alliance credibility appears to erode.

Disconfirming evidence would take the opposite form. If successive South Korean leaders consistently express strong confidence in U.S. extended deterrence, even in the wake of North Korean nuclear or ICBM advancements, this would undermine the causal logic of the hypothesis. Similarly, if no temporal correlation exists between North Korean capability improvements and any increase in elite nuclear advocacy, public debate, or policy change, then declining credibility cannot plausibly account for nuclear decision-making. Finally, if the South Korean government refrains from investing in technologies associated with potential nuclear military applications during periods of heightened uncertainty about U.S. reliability, this would disconfirm the hypothesis by revealing that concerns about abandonment do not translate into concrete proliferative behavior.

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<sup>16</sup> Jeffrey W. Taliaferro, *Defending Frenemies: Alliances, Politics, and Nuclear Nonproliferation in US Foreign Policy* (Oxford University Press, 2019), 193.

## Domestic Political Pressures and Electoral Constraints

The second hypothesis is grounded in domestic political approaches to foreign policy decision-making, especially in democratic states where leaders must respond to public preferences and electoral incentives. Unlike structural or alliance-based theories, domestic approaches emphasize how public opinion, party competition, leadership incentives, and identity politics shape nuclear decision-making in democratic states.<sup>17</sup> Although external threats matter, these theories argue that nuclear acquisition ultimately reflects the political incentives faced by domestic elites. Etel Solingen's work on nuclear decision-making emphasizes that domestic political coalitions can shape a state's orientation toward nuclear weapons, with inward-oriented, nationalist coalitions more likely to favor nuclear acquisition and outward-oriented, liberalizing coalitions more likely to restrain it.<sup>18</sup> In this tradition, nuclear decisions emerge less from structural imperatives than they do from internal political contestation.

## Observable Implications, Confirming Indicators, and Disconfirming Indicators

If domestic political pressures, rather than alliance dynamics, drive nuclear decision-making, then we should expect a distinct set of observable implications. Confirming evidence would include clear patterns wherein surges in public support for nuclear weapons precede or directly influence elite political rhetoric. In such a scenario, political leaders would frame nuclear acquisition as a response to voter preferences, putting an emphasis on national pride and security autonomy. We would also expect nuclear issues to appear in electoral competition, with candidates or parties attempting to differentiate themselves through more assertive nuclear positions. Bureaucratic political pressures would further strengthen this pathway if military planners and strategic agencies signal that nuclear options would benefit national security. If these domestic pressures correlate with explicit policy movements, such as parliamentary debates on nuclear options or attempts to modify domestic laws governing nuclear technology, they will constitute strong confirming evidence.

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<sup>17</sup> Jacques E. C. Hymans, *The Psychology of Nuclear Proliferation: Identity, Emotions and Foreign Policy* (Cambridge University Press, 2006), 21–28; Jo and Gartzke, “Determinants of Nuclear Weapons Proliferation,” 170–171.

<sup>18</sup> Solingen, *Nuclear Logics: Contrasting Paths in East Asia and the Middle East*, 24, 84; Curtice, *Why Do States Build Nuclear Weapons? Proliferation Models as Concurrent Pressures on a State*, 40–46.

On the other hand, disconfirming evidence would emerge if public support remains high for nuclear weapons even as elites do not adjust their rhetoric or policy signals accordingly. If political leaders consistently downplay or reject nuclear acquisition despite electoral environments in which nuclear preferences appear to offer political advantage, the hypothesis will lose explanatory leverage. If nuclear sentiment in the public fluctuates without producing any corresponding shifts in elite discourse, these patterns would disconfirm the view that internal politics drive nuclear choices.

### **Evaluating the Alliance Credibility Hypothesis, 2022–2025**

Beginning in 2022, North Korea significantly expanded and diversified its nuclear and missile capabilities.<sup>19</sup> In September of that year, Pyongyang codified a new nuclear doctrine that authorized preemptive nuclear use under broad conditions and declared its nuclear status “irreversible,” signaling a shift toward a more assertive and warfighting-oriented posture.<sup>20</sup> This doctrinal change removed any remaining ambiguity about North Korea’s long-term intentions and reinforced the perception in Seoul that denuclearization negotiations had become strategically obsolete.<sup>21</sup> These doctrinal revisions were accompanied by substantial technological advances. In 2023, North Korea tested the solid-fuel Hwasong-18 ICBM, which analysts at the Center for Strategic and International Studies assessed as capable of striking “anywhere in the continental United States with multiple warheads.”<sup>22</sup> Solid-fuel propulsion allows for faster launch times, greater survivability, and reduced vulnerability to preemptive strikes, thereby enhancing the credibility of North Korea’s threat to the U.S. homeland. These developments intensify the classical decoupling problem identified by alliance theorists. If North Korea can reliably threaten the U.S. homeland, South Korean leaders must consider whether Washington would accept nuclear retaliation to defend Seoul.

The initial South Korean response to these developments aligns with the observable implications of the alliance-credibility hypothesis. In January 2023, President Yoon Suk-Yeol stated publicly that South Korea “might build its own nuclear weapons” if the threat environment worsened.<sup>23</sup> This statement, the first of its kind by a sitting ROK president in decades, implicitly shows that extended deterrence alone might not be

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<sup>19</sup> Farago, “Why US Extended Deterrence to South Korea Might Not Work,” 656-657.

<sup>20</sup> *Ibid.*, 656-657.

<sup>21</sup> *Ibid.*, 648.

<sup>22</sup> *Ibid.*, 649-651.

<sup>23</sup> *Ibid.*, 648.

sufficient as North Korean military capabilities improve. It demonstrates that senior decision-makers interpreted North Korea's advances as sufficient to reopen nuclear debates and to consider options that would otherwise be politically costly or diplomatically risky. This remark constitutes clear confirming evidence: a clear articulation of concerns tied to observable shifts in the external threat environment.

In response to Seoul's growing anxiety, the United States undertook a series of reassurance initiatives. The April 2023 Washington Declaration established the bilateral Nuclear Consultative Group (NCG), expanded strategic planning coordination, and announced more frequent deployments of U.S. strategic assets to the Korean Peninsula.<sup>24</sup> In July 2023, the USS Kentucky, an Ohio-class ballistic missile submarine, made a high-visibility port visit to Busan, the first such deployment since 1981.<sup>25</sup> These steps were intended to demonstrate the robustness and reliability of U.S. extended deterrence by the Biden administration.<sup>26</sup> Key indicators, however, indicate that these reassurance measures did not significantly alleviate South Korean anxieties. Surveys by the Asan Institute from 2023 to 2025 show that between 71–76 percent of South Koreans consistently supported acquiring an indigenous nuclear arsenal, even after the USS Kentucky visit and expanded NCG activities.<sup>27</sup> Under the alliance-credibility hypothesis, this persistent public preference suggests that reassurance was insufficient to counteract perceptions of heightened vulnerability.

Moreover, policy discourse within Seoul reflected a growing consensus that extended deterrence alone may be inadequate to address future contingencies. Several state-linked research organizations, including the Institute for National Security Strategy, recommended that the government explore options ranging from NATO-style nuclear sharing to an indigenous nuclear armament.<sup>28</sup> South Korean conservative commentators and

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<sup>24</sup> The White House, "Washington Declaration," April 26, 2023, 2.

<sup>25</sup> Josh Smith, "Rare Submarine Visit Reminds North Korea of U.S. Nuclear Missiles," *Reuters*, July 21, 2023, <https://www.reuters.com/world/asia-pacific/rare-submarine-visit-reminds-north-korea-us-nuclear-missiles-out-sight-range-2023-07-21/>.

<sup>26</sup> Betsy Klein, Kylie Atwood, and Sam Fossom, "Biden and South Korea's Yoon Announce Agreement to Deter North Korea, Including Deploying Nuclear-Armed Submarine," *CNN*, April 26, 2023, <https://www.cnn.com/2023/04/26/politics/biden-yoon-south-korea-state-visit>.

<sup>27</sup> "Asan Poll: 'South Koreans and Their Neighbors 2025' Record 76.2% Public Support for Nuclear Armament," *The Asan Institute for Policy Studies*, April 28, 2023, [https://asaninst.org/bbs/board.php?bo\\_table=s3\\_4\\_2\\_eng&wr\\_id=92&sfl=wr\\_subject%7C%7Cwr\\_content&stx=opinion%2Bsurvey&sop=and](https://asaninst.org/bbs/board.php?bo_table=s3_4_2_eng&wr_id=92&sfl=wr_subject%7C%7Cwr_content&stx=opinion%2Bsurvey&sop=and).

<sup>28</sup> Kim Min-seo, Yang Seung-shik, and Yeom Hyun-a, "'S. Korea Should Consider Nuclear Armament after N. Korea-Russia Pact': New Report," *The Chosun Daily*, June 23, 2024, <https://www.chosun.com/english/national-en/2024/06/24/VIHO77UDYVAKDF23LPUNBPTORA/>.

retired military officers posited that a South Korean nuclear deterrent could potentially be integrated into the U.S. alliance framework as a “shared asset.”<sup>29</sup> The appointment in late 2024 of Kim Yong-Hyun as minister of national defense further represented an institutional signal of this trend. Kim, a retired general and former academic, had long argued that South Korea might eventually require nuclear weapons to ensure its survival.<sup>30</sup> In resurfaced footage from a 2020 seminar, he warned that South Korea had “no survival or future” without a nuclear deterrent.<sup>31</sup> During his confirmation hearings, Kim did not repudiate those earlier views. Instead, he stated that “all options” should remain open should U.S. extended deterrence prove insufficient.<sup>32</sup> Although the administration reiterated its formal commitment to the Treaty on Non-Proliferation of Nuclear Weapons (NPT), the elevation of an official with a history of nuclear advocacy suggests that concerns about U.S. credibility had penetrated the upper levels of the national security bureaucracy.

The return of Donald Trump to the U.S. presidency in 2025 further reinforced these anxieties. Throughout the 2024 campaign, Trump questioned the value of U.S. alliances, criticized burden-sharing, and suggested that U.S. defense commitments should be contingent upon increased payments.<sup>33</sup> Early comments in his second term echoed these themes.<sup>34</sup> While ostensibly directed at European partners, these statements carried implications for South Korea because Seoul had confronted similar threats during Trump’s first term, when he considered troop withdrawals and demanded substantial increases in host-nation support. Reporting by the Foundation for Strategic Research noted that Korean officials interpreted Trump’s rhetoric as a sign of enduring volatility in American alliance policy.<sup>35</sup> Several Trump-aligned officials have also expressed

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<sup>29</sup> Choi Kang, “South Korea’s Indigenous Nuclear Weapons Could Be a ‘Common Asset,’” *The Asian Institute for Policy Studies*, September 6, 2024, [https://asaninst.org/data/file/s1\\_3\\_eng/f15af67c43af1afd7a990dc4f32fd2b\\_72cUnShi\\_4f2d41a32coe594596556e7ef87ef62409192756.pdf](https://asaninst.org/data/file/s1_3_eng/f15af67c43af1afd7a990dc4f32fd2b_72cUnShi_4f2d41a32coe594596556e7ef87ef62409192756.pdf).

<sup>30</sup> William Gallo and Lee Juhyun, “Under Yoon, Calls for South Korean Nukes ‘Normalized,’” *Voice of America*, September 9, 2024, <https://www.voanews.com/a/under-yoon-calls-for-south-korean-nukes-normalized/7777068.html>.

<sup>31</sup> Gallo and Lee, “Under Yoon.”

<sup>32</sup> *Ibid.*

<sup>33</sup> Emmet Lyons, “Trump Questions NATO Allies’ Will for Collective Defense While Casting Doubt on U.S.’ Own Treaty Commitment,” *CBS News*, March 17, 2025, <https://www.cbsnews.com/news/trump-nato-article-5-collective-defense-europe-doubt-us-treaty-commitment/>.

<sup>34</sup> Lyons, “Trump Questions NATO.”

<sup>35</sup> Emmanuelle Maitre, “Towards a South Korean Nuclear Weapon? Political and Strategic Considerations: Foundation for Strategic Research,” *Foundation for Strategic Research*, Accessed December 8, 2025, <https://www.frstrategie.org/en/programs/korea-security-and->

openness to South Korean nuclear acquisition under certain conditions, describing it as potentially compatible with U.S. interests if it contributed to broader regional balancing. Elbridge Colby, who currently serves as the Under Secretary of Defense for Policy (USDP), had declared in the past that “It’s time to put all options, including South Korea’s own nuclear armament, on the table and discuss them.”<sup>36</sup> From Seoul’s perspective, such arguments are double-edged. On the one hand, they reduce the perceived diplomatic cost of considering indigenous nuclear options. On the other hand, they reinforce the impression that the United States may seek to offload security responsibilities onto its allies rather than maintain a robust extended deterrent. Both effects are broadly consistent with the alliance-credibility hypothesis: they weaken confidence in the stability and permanence of U.S. guarantees, thereby increasing the relative attractiveness of an independent deterrent.

Furthermore, in late 2025, the National Security Strategy released by the second Trump administration represented a marked departure from the 2017 document, which had explicitly framed U.S. foreign policy around renewed great-power competition and identified China and Russia as revisionist adversaries, alongside North Korea as a regional threat.<sup>37</sup> The new strategy largely abandons this framework. China appears primarily as an economic competitor, Russia is not clearly identified as a strategic adversary, and North Korea is hardly addressed.<sup>38</sup> Equally striking is the absence of sustained discussion of U.S. alliance commitments in Northeast Asia.<sup>39</sup> From the perspective of alliance management, such omissions are consequential because they weaken strategic clarity at the exact moment when it is most valuable. A strategy document that gives limited attention to alliance commitments and the North Korea threat, therefore amplifies abandonment fears.

The election of Lee Jae-myung as president in 2025 has not eliminated these underlying tensions, but has complicated the interpretation of the evidence. Lee campaigned on a platform that combined a more

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diplomacy-program/towards-south-korean-nuclear-weapon-political-and-strategic-considerations-2025.

<sup>36</sup> Toby Dalton and Celia McDowall, “The Key Questions Senators Should Ask Trump’s Nuclear Policy Nominees,” *Carnegie Endowment for International Peace*, February 26, 2026, <https://carnegieendowment.org/emissary/2025/03/nuclear-policy-security-nominees-trump-senate-questions-confirmation-hearings?lang=en>.

<sup>37</sup> The White House, *National Security Strategy of the United States of America* (December 2017), 45-48, <https://trumpwhitehouse.archives.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf>.

<sup>38</sup> The White House, *National Security Strategy of the United States of America* (November 2025), 8-25, <https://www.whitehouse.gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf>.

<sup>39</sup> The White House, *National Security Strategy*, (November 2025).

conciliatory approach toward North Korea with a reaffirmation of the U.S.–ROK alliance.<sup>40</sup> In his speech to the United Nations General Assembly in September 2025, he called for a “phased solution” to reduce tensions and emphasized peaceful coexistence on the peninsula rather than confrontation.<sup>41</sup> In other public remarks, Lee stressed that Seoul would continue to rely on U.S. extended deterrence while seeking to restore inter-Korean dialogue and confidence-building measures.<sup>42</sup> His administration has not endorsed nuclear armament and has reiterated South Korea’s commitment to the NPT.<sup>43</sup> These positions constitute partial disconfirming evidence for the alliance-credibility hypothesis. They suggest that, at least under the current leadership, concerns about abandonment have not yet produced a decisive policy shift toward proliferation.

Nevertheless, Lee’s government has also taken steps that keep the nuclear question alive. Early discussions with Washington have reportedly included requests for deeper consultation mechanisms on nuclear planning and for greater autonomy in conventional defense, including renewed interest in technologies such as nuclear-powered submarines and advanced missile defenses.<sup>44</sup> Although these initiatives do not cross the legal threshold into nuclear weapons development, they preserve future options and expand strategic autonomy. Moreover, public opinion data have not changed dramatically under Lee. Support for an indigenous nuclear arsenal has remained high, and influential think-tank figures such as Choi Kang of the Asan Institute continue to argue that a South Korean nuclear capability could eventually be framed as complementary to, rather than in opposition to, U.S. strategy.<sup>45</sup>

On balance, the empirical record from 2022 to 2025 partially confirms the alliance-credibility hypothesis. North Korea’s doctrinal and technological advances have increased the objective risks facing both South Korea and the United States. U.S. reassurance measures have been

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<sup>40</sup> “At U.N., South Korean Leader Vows to Reduce Tensions with North Korea,” *The Japan Times*, September 24, 2025, <https://www.japantimes.co.jp/news/2025/09/24/asia-pacific/politics/koreas-lee-new-era/>.

<sup>41</sup> “At U.N., South Korean Leader Vows to Reduce Tensions with North Korea.”

<sup>42</sup> Kim Eun-jung, “Lee Says S. Korea’s Ultimate Goal Is Reunification with N. Korea,” *UPI*, November 24, 2025, [https://www.upi.com/Top\\_News/World-News/2025/11/24/korea-Lee-Jae-Myung-reunification-North-Korea-ultimate-goal-G20/3601763959814/](https://www.upi.com/Top_News/World-News/2025/11/24/korea-Lee-Jae-Myung-reunification-North-Korea-ultimate-goal-G20/3601763959814/).

<sup>43</sup> Kim, “Lee Says S. Korea’s Ultimate Goal.”

<sup>44</sup> Kate Kang, “After Trump’s ‘dry in the U.S.’ Remark, South Korea’s Nuclear Submarine Debate Reignites Entirely,” *IR Insider*, November 20, 2025, <https://www.irinsider.org/east-asia-1/after-trumps-dry-in-the-us-remark-south-koreas-nuclear-submarine-debate-reignites-entirely/>; “Hegseth Praises South Korea’s Plans to Raise Its Military Spending and Boost Defense Capabilities,” *The Asahi Shimbun*, November 5, 2025, <https://www.asahi.com/ajw/articles/16136938>.

<sup>45</sup> Kang, “South Korea’s Indigenous Nuclear Weapons.”

substantial but have not fully dispelled South Korean fears of decoupling, as reflected in persistently high public support for nuclear weapons and the mainstreaming of elite nuclear discourse. The rhetoric of key officials under Yoon and the appointment and statements of Defense Minister Kim Yong-Hyun, in particular, align closely with the observable implications outlined in the theoretical section: doubts about U.S. willingness to incur nuclear risks have translated into open discussion of nuclear options at the highest levels of government. At the same time, the absence of concrete moves toward weaponization—no abrogation of NPT commitments, no declared fuel-cycle breakout, and no official decision to pursue nuclear arms—together with President Lee’s more cautious posture, prevents a full confirmation. The evidence thus points toward a scenario in which alliance-credibility concerns have significantly increased the likelihood that South Korea will one day consider nuclear proliferation, but have not, at least thus far, tipped the state into an irreversible nuclear path.

### **Evaluating the Domestic Political Pressures Hypothesis, 2022–2025**

Domestic political pressures in South Korea have become an increasingly important element of the nuclear debate. From 2022 to 2025, the evolution of public opinion, partisan competition, and bureaucratic activism produced a domestic environment that made nuclear acquisition politically salient. A core feature of this period is the persistence of overwhelming public support for an indigenous nuclear deterrent. As highlighted earlier, surveys by the Chicago Council on Global Affairs and the Chey Institute throughout 2022 to 2024 consistently showed nuclear support ranging from roughly 70 to 76 percent, with only marginal partisan variation.<sup>46</sup> These findings deserve close analytical attention because they remained high even during periods of reduced crisis intensity. They reflect a deeper structural shift in public attitudes: nuclear acquisition has become a mainstream expectation rather than a fringe viewpoint.<sup>47</sup> For the domestic political hypothesis, such sustained public support is highly relevant as it establishes a permissive electoral environment in which political elites face

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<sup>46</sup> Karl Friedhoff, Toby Dalton and Lami Kim, “Thinking Nuclear: South Korean Attitudes on Nuclear Weapons,” *Chicago Council on Global Affairs*, February 21, 2022, <https://globalaffairs.org/research/public-opinion-survey/thinking-nuclear-south-korean-attitudes-nuclear-weapons>; Thomas Maresca, “Survey: Almost 73% of South Koreans Want Country to Develop Nukes,” *UPI*, February 6, 2024, [https://www.upi.com/Top\\_News/World-News/2024/02/06/Gallup-Chey-survey-North-Korea-nuclear-weapons-denuclearization/8841707211962/](https://www.upi.com/Top_News/World-News/2024/02/06/Gallup-Chey-survey-North-Korea-nuclear-weapons-denuclearization/8841707211962/).

<sup>47</sup> Friedhoff, Dalton, and Kim, “Thinking Nuclear: South Korean Attitudes on Nuclear Weapons.”

little backlash for invoking nuclear options and may, in some cases, gain political advantage by doing so.

The observable implication expects that political parties, particularly those in opposition, will leverage nuclear issues for electoral differentiation. The empirical record strongly confirms this expectation. From 2023 onward, conservative lawmakers within the People Power Party repeatedly discussed adopting “nuclear armament as an official party policy initiative,” framing nuclear options as necessary for deterrence and national self-reliance.<sup>48</sup> These statements did not emerge during acute crises; they occurred even during periods of relative diplomatic calm. The persistence of nuclear rhetoric under such conditions indicates that nuclear issues have become embedded in partisan competition. Conservative elites used nuclear advocacy to position themselves as stronger guardians of national security and as more willing to challenge what they characterized as over-reliance on the United States.<sup>49</sup> This behavior constitutes clear confirming evidence: partisan actors treated nuclearization not solely as a strategic question but as a political resource, utilizing it to differentiate policy agendas and court voters already predisposed toward nuclear options. The domestic mechanism thus operated through electoral incentives, as predicted.

The second major development regarding the domestic hypothesis is the expansion of nuclear discourse within bureaucratic and policy institutions. In June 2024, the state-funded Institute for National Security Strategy (INSS) issued a report “calling for diversifying options in response to North Korean threats,” including the possibility of redeploying U.S. tactical nuclear weapons or exploring an indigenous program.<sup>50</sup> The existence of this report signaled institutional recognition that nuclear policy had become a legitimate topic of national strategic planning. The INSS is not an opposition think tank; it is affiliated with South Korea’s National Intelligence Service. Its engagement with nuclear options indicates that the bureaucracy now views nuclear questions as relevant to long-term strategy. For the domestic political hypothesis, this constitutes a form of bureaucratic confirming evidence, demonstrating that nuclear discourse has penetrated the technocratic core of national security planning.

The hypothesis also predicts a key disconfirming implication: if domestic pressures alone were determinative, a change in political leadership should not significantly alter nuclear advocacy. The election of President

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<sup>48</sup> Kim Seung-yeon, “Deepening Russia-N.K. Ties Reignite Debate over S. Korea’s Nuclear Options,” *Yonhap News Agency*, June 26, 2024, <https://m-en.yna.co.kr/view/AEN20240626005000315?section=features%2Ffeatures>.

<sup>49</sup> Kim, “Deepening Russia-N.K. Ties.”

<sup>50</sup> *Ibid.*

Lee Jae-myung in 2025 provides a critical test. Lee's government quickly reaffirmed commitment to the Non-Proliferation Treaty, emphasizing the importance of sustained U.S.-ROK coordination and warning against strategic overreach.<sup>51</sup> In contrast to Yoon-era rhetoric, Lee and his national security team have avoided invoking nuclear options and instead stressed the importance of strengthening conventional deterrence and alliance mechanisms.<sup>52</sup> These actions demonstrate that domestic pressures are permissive but not decisive. Despite strong cross-partisan public support and clear partisan incentives, the executive exercised restraint. This pattern constitutes disconfirming evidence for the domestic political hypothesis.

However, the disconfirming evidence does not negate the influence of domestic pressures; rather, it clarifies the conditions under which they matter. Even as Lee publicly rejected nuclear options, domestic incentives redirected themselves into adjacent strategic domains. A particularly salient example emerged in the elevation of nuclear-powered submarines (SSNs) to a bipartisan national priority by 2025.<sup>53</sup> South Korean interest in naval nuclear propulsion predates this period, but it was the domestic environment of the Yoon years—marked by high public support for nuclearization and escalating partisan competition over strategic autonomy—that propelled SSNs into the center of national debate.<sup>54</sup> Notably, the SSN issue remained politically salient under Lee. Reporting from *Military.com*, *Reuters*, and *Politico* indicates that during the recent 2025 summit with President Trump, Lee personally requested U.S. approval to acquire nuclear submarine propulsion technology.<sup>55</sup> Operational arguments framed the request—South Korea's diesel-electric fleet was increasingly inadequate for tracking Chinese and North Korean submarines in contested waters—but the political significance extends beyond capability gaps. The very fact that a progressive president, one who had campaigned on alliance coordination and diplomatic engagement, advanced a nuclear-relevant request underscores the gravitational pull of domestic expectations. Strategic autonomy has become a cross-party norm.

Domestic reactions to the submarine agreement further illustrate the mechanisms at work. Conservative media outlets criticized the deal, arguing that U.S. approval merely enabled South Korea to purchase

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<sup>51</sup> Kim, "Lee Says S. Korea's Ultimate Goal."

<sup>52</sup> *Ibid.*

<sup>53</sup> Chris Megerian and Josh Boak, "US Will Share Tech to Let South Korea Build a Nuclear-Powered Submarine, Trump Says," *Military.com*, October 30, 2025; "South Korea's Lee asks Trump for fuel used by nuclear-powered submarines," *Reuters*, Accessed December 9, 2025.

<sup>54</sup> Megerian and Boak, "US Will Share Tech."

<sup>55</sup> *Ibid.*

submarines built in an American shipyard, without transferring nuclear propulsion technology or fuel.<sup>56</sup> From this viewpoint, SSNs without nuclear weapons could not provide a survivable second-strike capability and therefore offered limited strategic value. Such critiques demonstrate how partisan actors utilize nuclear-adjacent issues to argue for more assertive measures by portraying these arrangements as technologically constrained and strategically insufficient, implicitly favoring indigenous nuclearization. They reinforce the notion that domestic pressures constitute a powerful, though not always uniform, driver of strategic debate.

Other analysts interpreted the agreement differently. Doo Jin-ho of the Korea Research Institute for National Strategy characterized the SSN acquisition as a major diplomatic success for the Lee administration, noting that previous U.S. administrations had rejected similar proposals due to concerns about nuclear proliferation.<sup>57</sup> In this interpretation, Trump's more transactional approach created an opportunity for Seoul to secure a concession that earlier governments could not obtain. This view illustrates a distinct domestic mechanism: policy entrepreneurs and technocratic elites frame nuclear-adjacent initiatives as evidence of effective leadership, thus enhancing political incentives to pursue similar capabilities. Reuters also reported that South Korean officials sought U.S. permission for fuel-cycle activities related to submarine propulsion, indicating a willingness to explore capabilities previously considered too sensitive to pursue.<sup>58</sup> These developments align with the theoretical expectation that bureaucratic actors, operating under conditions of high public support and permissive partisan rhetoric, will expand the policy agenda into nuclear-relevant domains.

Taken together, the domestic record from 2022 to 2025 provides partial confirmation for the domestic-political hypothesis. Public opinion stabilized at levels that made nuclearization politically attractive; opposition lawmakers adopted nuclear rhetoric as a tool of electoral differentiation; and bureaucratic institutions integrated nuclear-relevant concepts into long-term planning. At the same time, the executive's restraint under President Lee demonstrates that domestic pressures operate as permissive conditions rather than decisive catalysts. Leadership preferences, international commitments, and alliance dependencies continue to mediate the translation of domestic incentives into policy. The domestic mechanism

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<sup>56</sup> Konstantin Asmolov, "Why Does South Korea Need a Nuclear Submarine?," *New Eastern Outlook*, November 22, 2025.

<sup>57</sup> Asmolov, "Why Does South Korea Need a Nuclear Submarine?"

<sup>58</sup> Ju-min Park and Joyce Lee, "South Korea Seeks US Fuel for Domestically Built Nuclear-Powered Submarine, Official Says," *Reuters*, 2025, <https://www.reuters.com/business/energy/south-korea-seeks-us-fuel-domestically-built-nuclear-powered-submarine-official-2025-11-07/>.

thus increases the likelihood that nuclear options remain on the strategic agenda, but it has not yet produced an irreversible movement toward nuclear acquisition.

### **Conclusion: Strategic Uncertainty, Converging Pressures, and the Limits of Nuclear Restraint**

This study set out to evaluate the conditions under which the Republic of Korea might pursue an indigenous nuclear deterrent by examining two competing, though not mutually exclusive, explanations: the alliance credibility hypothesis and the domestic political hypothesis. Both mechanisms were empirically supported between 2022 and 2025, but neither was sufficient on its own to trigger a decisive shift toward nuclear acquisition. Instead, South Korea's nuclear posture during this period is best understood as strategic hedging shaped by the interaction of external uncertainty and permissive domestic politics, rather than by an irreversible commitment to proliferation.

From an alliance-politics perspective, the findings are broadly consistent with theories that emphasize abandonment risk and the fragility of extended deterrence when an adversary can credibly threaten the patron's homeland.<sup>59</sup> North Korea's doctrinal codification of preemptive nuclear use and its successful testing of the solid-fuel Hwasong-18 significantly heightened decoupling risks.<sup>60</sup> These structural shifts elevated abandonment concerns in Seoul and pushed nuclear options into the mainstream of official discourse. High-visibility U.S. reassurance measures, including the Washington Declaration and the USS Kentucky's visit, failed to eliminate these anxieties.<sup>61</sup> As the alliance evaluation showed, credibility is shaped not only by deployment and consultation mechanisms, but also by broader U.S. strategic signaling, which affects perceptions in Seoul about long-term political will and alliance priority. At the same time, the absence of concrete moves toward nuclear breakout—no abrogation of NPT commitments, no declared shift in fuel-cycle policy, and no presidential commitment to proliferation—suggests that alliance anxieties, while serious, have not yet pushed South Korea across the nuclear threshold.

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<sup>59</sup> Kim, *South Korea's Nuclear Hedging?*, 119-120; Curtice, *Why Do States Build Nuclear Weapons? Proliferation Models as Concurrent Pressures on a State*, 58.

<sup>60</sup> Farago, "Why US Extended Deterrence to South Korea Might Not Work," 649-657.

<sup>61</sup> The White House, "Washington Declaration," 2; Smith, "Rare Submarine Visit Reminds North Korea of U.S. Nuclear Missiles"; Klein, Atwood, and Fossum, "Biden and South Korea's Yoon Announce Agreement to Deter North Korea, Including Deploying Nuclear-Armed Submarine."

Domestic political dynamics reinforce this conclusion. Sustained public support for nuclear weapons, cross-partisan elite discourse, and bureaucratic engagement with nuclear-adjacent capabilities have lowered the political costs of nuclear advocacy and ensured that nuclear options remain salient.<sup>62</sup> At the same time, the restraint exercised by the current South Korean leadership underscores the limits of domestic explanations. Despite favorable public opinion and electoral incentives, executive preferences, legal constraints, and continued reliance on the U.S. alliance have thus far prevented a transition from hedging to weaponization.<sup>63</sup>

Together, the findings from both hypotheses indicate that South Korea's nuclear trajectory remains contingent, fluid, and highly sensitive to future changes in both structural and domestic conditions. Abandonment concerns have intensified, but they have not produced an irreversible move toward nuclear weapons. Domestic pressures have become more powerful and more institutionalized, but they remain permissive rather than determinative. In the absence of a decisive convergence between severe alliance erosion and domestic political incentives strong enough to make nuclear acquisition unavoidable, South Korea is likely to continue its current hedging strategy—maintaining alliance commitments while expanding nuclear-adjacent capabilities that enhance autonomy without breaching nonproliferation norms.

More broadly, the South Korean case highlights a central insight of alliance politics: under conditions of heightened threat and strategic ambiguity, nuclear restraint is not automatic but conditional. Extended deterrence can persist even in the face of serious credibility challenges, but only so long as reassurance, consultation, and credible signaling remain sufficient to offset abandonment fears. When those conditions weaken, states may hedge rather than proliferate, preserving flexibility while stopping short of nuclear acquisition.

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<sup>62</sup> Friedhoff, Dalton and Kim, “Thinking Nuclear: South Korean Attitudes on Nuclear Weapons”; Thomas Maresca, “Survey: Almost 73% of South Koreans Want Country to Develop Nukes.”

<sup>63</sup> Kim, “Lee Says S. Korea’s Ultimate Goal.”

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