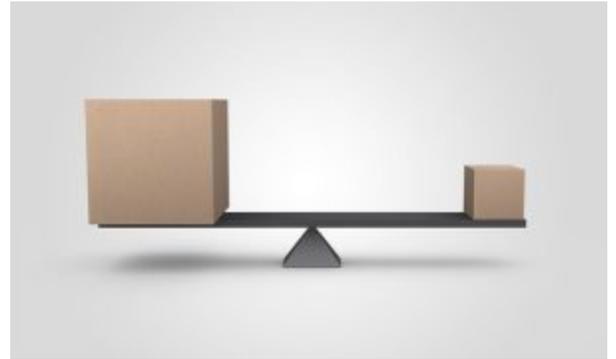


Where Next on the Peninsula?

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There is an open opportunity for President Trump in negotiations with Kim Jong Un to confound enemies –and friends–in a deal that will make America Safe Again, although at what cost?



Since the collapse of the Soviet Empire a third of a century ago, three generations of the Kim family have searched for an American president willing to seriously engage. Kim Jong Un thought he had found that in Donald Trump. In the run-up to the 2019 Hanoi Summit they followed the path laid down by Steve Biegun in his Stanford University [speech \(https://fsi-live.s3.us-west-1.amazonaws.com/s3fs-public/transcript_stephen_bieugn_discussion_on_the_dprk_20190131.pdf\)](https://fsi-live.s3.us-west-1.amazonaws.com/s3fs-public/transcript_stephen_bieugn_discussion_on_the_dprk_20190131.pdf) with a plan for a carefully choreographed step by step denuclearization process over a decade or more, front loaded with North Korea's surrender of the Yongbyon nuclear complex for disablement and dismantlement in exchange for some UN sanctions relief. They were driven like lambs to the slaughter, with South Korea's intelligence services assuring them it was a done deal.

It's unclear whether Trump's real estate dealing muscle memory or his hunt for the biggest headlines to drown out his domestic woes were the problem in Hanoi. But Trump walked and Pyongyang concluded he was willing though unable to deal. The result was pro-engagement groups among North Korea's political elite abruptly and effectively neutralized. Watching the US retreat from Afghanistan and Washington's weakness over Ukraine and Gaza, Kim Jong Un chose, at that point, to pivot away from Washington and align with Moscow, Beijing and Tehran in a Second Cold War. Pyongyang knew it could not win a conventional war with the South, let alone with US intervention on Seoul's side, while the very nature of nuclear weapons

left no room to pry the South's misguided masses from their malign leadership. The economic reality of unification in the absence of assimilation meant the two systems could not sustainably coexist in any feasible time scale. Thus, all had to be cast into the outer darkness.

Kim has, given all these factors, chosen an alternate future for North Korea: one where sovereignty is key, and firmly underpinned by its nuclear deterrent. While Trump may see an opportunity within that space that could serve US interests, the *de facto* recognition of North Korea as a nuclear power could potentially catalyze a new nuclear arms race in East Asia and the effective demise of the Nuclear Non-Proliferation Treaty.

Once Bitten, Twice Shy

At a pragmatic level, there is no reason for Kim to court a second Hanoi humiliation. On the UN Security Council, he has Moscow and Beijing's twin vetoes to counter US maneuvers to increase pressure upon his regime. Even the current sanctions are more honored in breach than observance by Moscow and Beijing's neighboring provinces, if not the center.

While North Korea has rejected the American administration's early overtures to resume talks, even refusing Trump's [missive \(https://www.nknews.org/2025/04/trump-says-us-may-do-something-with-dprk-citing-open-communication-channels/\)](https://www.nknews.org/2025/04/trump-says-us-may-do-something-with-dprk-citing-open-communication-channels/) at their New York Embassy, Kim Jong Un's recent speech has created an opening for Trump-Kim talks in the future. However, one condition is clear: abandon any dreams of denuclearization. While the Chinese leadership is concerned about South Korea going nuclear—because of the potential knock-on to Japan and Taiwan—it may well have to settle for the better rather than the best with effectively an arms control regime.

While the US is regularly castigated by the North, Trump himself largely remains immune. Therefore, in the light of the speech, there's a real possibility that Kim might be seduced by the theatre of being global center-stage with Trump once again.

If, and when, the two do meet, it is unclear what the full agenda will be, and Kim may be on a hair-trigger to walk first this time around, leaving a narrow path to success. It is just possible that Pyongyang might—with some delicacy and some difficulty regarding Seoul and Tokyo—end up signing off on a multilateral deal effectively offering some form of arms control in exchange for massive industrial funding over a decade or more. Trump's obsession with the Nobel Peace Prize may well lead him to concessions and a deal he might not otherwise make.

A Cautionary Scenario

Constructing a deal where both Pyongyang and Washington can credibly claim a win is challenging but far from impossible—yet will come with considerable collateral damage to both friends and neighbors. One plausible scenario, for instance, could include a North Korean commitment to certain arms limitations in exchange for significant sanctions relief and, if the US approach to Ukraine is any example, potential investment in rare earth mining. Kim could announce that the North has completed all necessary nuclear and ICBM testing and satellite launches, and commit to halting further long-range missile development, with the unspoken notion for his domestic audience that henceforth the North is moving from development to production. Trump could claim, with some justification, he has made America “safe again” by ending the North’s ICBM testing and halting further progress to both a hydrogen bomb and warhead miniaturization. Yet, such a scenario, while alleviating the direct threat to the United States, leaves an augmented real and present danger to Seoul and Tokyo.

In sum, Kim would get the *de facto* recognition of the North as a nuclear power, a partial lifting of UN sanctions, normalization of relations with Washington, and potential massive Western investment. Such a deal would protect the United States while leaving its Japanese and South Korean allies exposed to the North’s continued development and deployment of medium and short-range ballistic missiles. This could serve Trump’s foreign and domestic interests. The nuclear umbrella over Northeast Asia could be furled with little threat to the US, while Seoul—and Tokyo—would be over a barrel in future negotiations to extend their Special Measures Agreements. Seoul, Tokyo, and Taipei may subsequently choose to go nuclear, but too late to make a difference.

Beijing too would be on its back foot. A US-DPRK relationship, potentially coupled with renewed US-Russia relations—when the war in Ukraine ends—would create new see-saw dynamics amid Moscow, Washington and Beijing, plus the possibility of North Korea acting out a ‘reverse Nixon’. The prospect of Taiwan going nuclear would be an anathema and nightmare for Beijing and threaten to destabilize the whole region, while the undermining of China’s quasi-monopoly on rare earths would weaken its global trade leverage with the West.

Conclusion

The stakes for any future Trump-Kim negotiation are high for Seoul and Tokyo. If they want to head off this ‘nightmare’ scenario, then Tokyo and its new Prime Minister in particular will need to adopt a more conciliatory approach to engagement with Pyongyang and the Trump administration as regards the North, while Seoul will need to find some novel ways of

indirectly engaging with the process. If this doesn't happen, it may well be the perfect case of "Be careful what you wish for, lest it come true." In retrospect, the current predicament may seem preferable to those that follow such a resolution.