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### *Neo-Cold War in Asia-Pacific and its impact on the Korean Peninsula*

*In US–China competition, technology matters, but alliances matter more*

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#### **Abstract**

The Chinese military and economic rise and the War in Ukraine seem to evoke a Neo Cold War scenario between autocracies and democracies that could forge alliances between non-rival Western economies centered on an Anglo-Saxon core (the USA, UK, Australia), complemented by Japan, India and Canada. The Korean peninsula, as a point of friction between ideological blocs, could be the scenario of renewed tensions. Nevertheless, the democratic-capitalist triangle (the US, South Korea and Japan) seems solidly integrated both militarily and economically. The autocratic triangle (China, North Korea and Russia), on the other hand, seems more united by common anti-hegemonic interests than by economic ties, with Russia and North Korea on the rise.

#### **Keywords**

Buffer state, alliance, Korea, New Cold War, nuclear.

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## Introduction

The increase in the Chinese military budget, which has reached figures equivalent to those of the extinct USSR, and the Russian invasion of Ukraine seem to evoke a Neo-Cold War scenario between an autocratic and a democratic-capitalist bloc that could create a post-pandemic “regionalisation” based on economic spheres self-sufficient in resources and technology led by China and the USA<sup>1</sup>.

This partial return to the balance of power and the progressive abandonment of global liberalism could lead to a redefinition of current alliances and greater tension in the buffer states that act as buffer zones between antagonistic blocs since, as the first Cold War demonstrated, global balances do not prevent local conflicts<sup>2</sup>.

The Korean peninsula seems the ideal scenario for this analysis for several reasons: it is a buffer region still anchored in the first Cold War (officially no Peace Treaty has been signed but merely an armistice that ended hostilities<sup>3</sup>), where the US and China clashed militarily, and where there are no formal multilateral alliances similar to NATO but triangular agreements between countries of the democratic-capitalist bloc (US, South Korea and Japan) and the autocratic one (China, North Korea and Russia). Moreover, North Korea’s nuclearization has led to the creation of an unprecedented platform, the Six-Party Talks, which brings together, despite their ideological differences, the Six Countries directly concerned. Nor should it be forgotten that it was the apparent exclusion of the Korean peninsula from the U.S. defensive perimeter that led to its civil war<sup>4</sup>. It therefore seems useful to have a diagnosis that allows us to understand the impact of the U.S. alliance strategy in the Asia-Pacific at one of its most tense points. To this end, we will analyse the American associative logic, the underlying socioeconomic trends in the countries of the Dialogue at Six, the internal interrelations of each ideological triangle and, finally, the influence of Australia and Pakistan, apparently peripheral states but which can play a relevant role in the alliance policy.

1 The United States could even be an autonomous hegemon because of its energy self-sufficiency, low population ageing, robotisation and global dollarisation. Castelltort Claramunt, M. (2021). El posible conflicto bélico entre Estados Unidos y China: reconsiderando la «Trampa de Tucídides» [The possible war conflict between the United States and China: reconsidering the “Thucydides Trap”]. *Revista del Instituto Español de Estudios Estratégicos*. (17), 271 – 300 / 605.

2 Kang, D. C. (2003). International Relations Theory and the Second Korean War. *International Studies Quarterly*. 47.

3 Ivashentsov, G. (2021). Will There Be an End to the War in Korea? <https://russiancouncil.ru/en/analytics-and-comments/analytics/will-there-be-an-end-to-the-war-in-korea/>

4 The result of a misinterpretation of Secretary of State Acheson’s speech on the Far East: “what we can see is that this new day in Asia, this new day that is dawning, may turn into a glorious noon or it may get dark and drizzle. But that decision is in the hands of the Asian countries and within the power of the Asian people”. Acheson, D. (1950). Speech on the Far East. 12 January. <https://www.cia.gov/readingroom/docs/I950-01-12.pdf>

## Evolution of the alliance policy

Cold War alliances were characterized by the leadership of a world power (US or USSR), some of which developed into permanent multilateral organizations such as NATO. Depending on the leading superpower and its political model, each alliance followed a different strategy: the USSR created a communist bloc of militarily controlled satellite states (Brezhnev doctrine) while the USA forged a military alliance of integrated economies (Truman doctrine). Soviet communism, without capitalist banks with the capacity to create money, lacked the resources to cover the costs of “nationalist alliances”<sup>5</sup>, which led to systemic implosion<sup>6</sup>. The democratic-capitalist bloc, endowed with greater financial muscle, created military allies, but also economic competitors<sup>7</sup>. However, common democratic values acted as coheirs, facilitating the continuity of the main alliance, NATO, even after the Soviet collapse<sup>8</sup>.

The fall of the Iron Curtain and the democratic-capitalist victory seemed to usher in a period of single-mindedness marked by a liberal globalization in which countries seemed to seek the same goal: peaceful progress<sup>9</sup>. Upon this assumption, a process of global economic delocalisation began without considering its impact on national security issues, a trend that accelerated with the incorporation of China into the World Trade Organization (2001). The result, two decades later, has been a strong technological and productive transfer to a State that, instead of democratizing, has reinforced its authoritarianism<sup>10</sup>. The present Sino-US rivalry would thus epitomise the failure of liberal globalisation and a return to realist balance of power thesis where Russia aspires to be both the global and Eurasian balancer<sup>11</sup>.

5 “Let the Russians spend their money on defence, and in the meantime we will raise our standard of living.” But that’s the wrong approach. It is pure nationalism. Unfortunately, this also exists in relations between socialist countries”. Khrushchev, S. (2006). Nikita Khrushchev. Reformer. 1945-1964. The Pennsylvania State University Press. P. 229.

6 Anticipated decades ago by Riker, W. H. (1967). The Theory of political coalitions. Yale University Press.

7 For example: The United States has been and is willing to accept limited economic disadvantages arising from preferential agreements among EC [European Community] member states because of the countervailing political advantages of European unity. U.S. Secretary of State. (1969). Memorandum From the Special Representative for Trade Negotiations (Gilbert) to Secretary of State Rogers. Preferential Trade Agreements. <https://history.state.gov/historicaldocuments/frus1969-76v04/d221>

8 “Democracies can and do disagree with each other, but they do not fear each other. They also need the approval of other democracies to carry out their foreign policies. These traits constitute built-in self-healing tendencies, which is why NATO endures”. Thies, W. (2009). Why NATO Endures. Cambridge University Press. P. 3.

9 Fukuyama, F. (1992). The End of History and the Last Man. Penguin Books.

10 Coyne, J., Savage, G. and Shoebridge, M. (2021). New beginnings Rethinking business and trade in an era of strategic clarity and rolling disruption. The Australian Strategic Policy.

11 Karaganov, S. A. (2021). On a Third Cold War. Russia in Global Affairs. 19(3), pp.102-115. doi: 10.31278/1810-6374-2021-19-3-102-115.

Faced with this paradigm shift in international relations, what kind of alliances could emerge? The most evident has been the Sino-Russian alliance, as there is a geostrategic complementarity; the alliance allows China to protect its main continental flank and establish itself as a maritime power to control both the Taiwan Strait and the Malacca Strait, while Moscow covers its eastern flank, the weakest demographically and economically; on that basis an alliance has been forged in which China provides capital to Russia and Russia provides energy and weapons, in addition to carrying out both joint military exercises<sup>12</sup>. However, the autocratic nature of their regimes may hinder economic integration similar to that of the democratic-capitalist bloc. Chinese state capitalism presents a strong political interference in strategic business decisions that can cause national security problems in business partners, as revealed by the case of Huawei<sup>13</sup>; therefore, only democracies seem to be able to form stable military alliances since autocracies, even if they are capitalist, would work under the logic that today's ally may be tomorrow's enemy<sup>14</sup>. It is this realisation that seems to justify Russia's view of NATO as its main enemy<sup>15</sup>.

On these premises, the US also seems to be redefining its global alliances, seeking countries that can simultaneously be military allies but not economic rivals, in stark contrast to its first Cold War strategy<sup>16</sup>. The result, for the time being, is an alliance triad with the Anglo-sphere as the central core and Australia as the preferred partner:

- AUKUS, the Indo-Pacific security agreement between the US, Australia and the UK.
- *Five Eyes*, the intelligence services alliance between AUKUS, New Zealand and Canada.

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12 Schoen, D. and Kaylan, M. (2015). *Return to winter: Russia, China, and the new cold war against America*. Encounter Books.

Institutional banks are those that report to the Chinese State Council: the Export-Import Bank of China (EXIM) and the *Agricultural Development Bank of China* (ADBC).

13 Ford, C. A. (2019). *Huawei and Its Siblings, the Chinese Tech Giants: National Security and Foreign Policy Implications*. 11 September. <https://www.state.gov>

Or also: "Huawei is not a company, but an arm of the Chinese intelligence services", in Bolton, J. (2020). *The Room where it happened*. Simon & Schuster.

14 Thies, W. (2009). *Op. cit.*

15 Stent, A. (2019). *Putin's world: Russia against the West*. Hachette.

16 "The United States, obsessed with the fight against communism, too sure of the permanent ontological character of its economic preeminence, then gave absolute priority to the political integration of its sphere of military domination. To do so, they opened their market to European products, and especially to Japanese products, sacrificing, at first without realizing it, then with some distress, a large part of their industry". Todd, E. (2004). *Après l'empire. Essai sur la décomposition du système américain*. Gallimard. P. 84

- *Quad*, the Quadrilateral Security Dialogue between the US, Australia, India and Japan, to ensure a free and open Indo-Pacific, and which includes joint military exercises.

This alliance reformulation would, however, raise worrying questions of *déjà-vu* for the Korean peninsula as a buffer region: on the one hand, it resurrects axes of World War I, when London, Washington and Tokyo agreed on a territorial division of Asia-Pacific where Australia was the regional Anglo-Saxon enclave and Korea and Taiwan, Japanese colonies<sup>17</sup>; on the other hand, it reiterates historical errors such as apparently omitting Korea from the U.S. defensive perimeter (which precipitated the civil war and the subsequent peninsular division), or pitting Australia again against its main trading partner (this time China, as had already happened with Japan in World War II); moreover, Japan and Australia were major beneficiaries of the Korean civil war because it allowed the industrialisation of the former and the wool export boom of the latter. Therefore, the new alliance design would recover, for Asia, a model with imperialist reminiscences that would legitimize Chinese and North Korean national-communist discourses and, apparently, undervalue South Korea as a regional Western partner, which could alter the peninsular balance of power.

### The particularities of the Korean conflict

Historically, Korea has been a region linked to China to protect itself from Manchu invasions from the north, but the rise of Japan and Russia turned it into a buffer state trapped between three regional powers, thus establishing a hitherto unheard-of balance of power in East Asia. Recent doctrinal currents postulate the propensity of the buffer states to disappear, victims of rivalry between opposing powers, with which they could not compete either militarily or economically to defend their diplomatic independence<sup>18</sup>. These would be the cases of the Japanese occupation of Korea (1910-1945) or the division of Poland between Austria, Prussia and Russia in the 18th century. However, the subsequent resurgence of both states, cases similar to those of Ecuador, Paraguay or Afghanistan, would seem to refute a geographical determinism and reaffirm the diplomatic and economic weakness of indigenous institutions as the main cause of the disappearance of the buffer states<sup>19</sup>. Consequently, in order to understand the impact of the new US alliance logic on the Korean peninsula, both its character as a divided buffer state and the socioeconomic and military strengths of the Dialogue Six states that condition indigenous diplomacy must be considered.

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17 Anglo-Japanese Alliance (1902-1923) and Taft-Katsura Agreement (1905).

18 Fazal, T. M. (2007). *State death: The Politics and Geography of Conquest, Occupation, and Annexation*. Princeton University Press.

19 Acemoglu, D. and Robinson, J. A. (2012). *Why Nations Fail: The Origins of Power, Prosperity, and Poverty*. Crown Business.

The Korean division, unlike the German division, was not an unintended consequence of world bloc politics but of irreconcilable ideological positions between leaders who, even today, consider themselves to be the legitimate authorities of the same nation, which hinders their reunification and perpetuates a state of war<sup>20</sup>. This entrenchment is explained by the fact that the U.S. liberation of the peninsula after World War II, unlike Manchuria and Taiwan, was not accompanied by a return to a native government prior to the Japanese occupation because Korea had never been formally independent. This lack of definition led to the founding of two states inspired by Western ideologies, the Republic of Korea (democratic-capitalist) and the Democratic People's Republic of North Korea (communist). This peculiar "self-colonisation"<sup>21</sup> permeated the idiosyncrasy of both states, which are still vying to preserve, even today, their authenticity, but above all, as buffer states, their diplomatic independence: Pyongyang with a policy of self-sufficiency (*Juche*), supported by its nuclear deterrent, and Seoul, with an economically emancipatory capitalism.

This peninsular irredentism led to global bloc politics, initiating the first Cold War, which, decades later, after the Soviet collapse and North Korean nuclearization, has shaped the Six-Party Talks as a referential framework<sup>22</sup>. However, pre-pandemic liberal globalization, with its transfer of technology and capital, has socioeconomically transformed the Six States, creating underlying synergies that do not necessarily coincide with their ideological identification and that should be systematized to better understand their respective national interests.

To compare the strength of heterogeneous socioeconomic systems, infant mortality and suicide rates are often used as demographic indicators that, because they are linked to real circumstances such as births and deaths, which must be recorded in administrative records, are less manipulable than economic estimates such as GDP, where the book value is more subjective<sup>23</sup>. As an ideologically aseptic indicator, the rise in infant mortality, a rare phenomenon in advanced societies, made it possible

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<sup>20</sup> According to Kim Dae-Jung, the assassination by a South Korean military officer of Kim Koo (1949), president of the provisional government of Korea, buried all hope of unification. "While we buried one of the most trusted leaders in all of Korea, the Korean people also buried their desperate yearnings for unification". Kim, D-J. (2019). *Conscience in Action*. Palgrave Macmillan. P. 24. <https://doi.org/10.1007/978-981-10-7623-7>.

<sup>21</sup> When the new mentality is imposed by national leaders and not by colonising foreign powers. Bouthoul, G. (1967) *Sociologie de la politique*. PUF. P. 46.

<sup>22</sup> "Kim [Jong Un] had cheated the Agreed Framework. I made a decision: The United States would stop negotiating with North Korea on a bilateral basis. Instead, we would bring together China, South Korea, Russia and Japan to present a united front against the regime". Bush, J. W. (2010). *Decision Points*. Crown.

<sup>23</sup> "Birth and death rates are powerful indicators, capable of revealing a society that is hiding. Unlike econometrics, whose quantitative analyses must be based on the fragile notions of price, quantity and quality, demography, a simple and brutal science, is insensitive to ideology". Todd, E. (1976). *La Chute final. Essai sur la décomposition de la sphère soviétique*. Robert Laffont. P. 6.

to predict, decades in advance, the Soviet collapse<sup>24</sup>. Currently, for example, it is the preferred indicator used to analyse Venezuela<sup>25</sup>. Applying the same criteria to the six Dialogue countries, the following conclusions could be drawn:

The leading triangle in overall social welfare would be made up of Japan, South Korea and Russia; the archipelago would be by far the nation with the highest level of health, having even improved during the supposed three “lost decades” of economic crisis, a case very similar to South Korea. Russia, after a post-Soviet stagnation, would have even surpassed the USA in terms of human development<sup>26</sup>.

This would confirm the Russian thesis of an American social decline, whose infant mortality rate (6.3 deaths per 1,000 births) is slightly higher than the Russian rate (5.4) and equivalent to the Japanese rate in 1990 (6.4)<sup>27</sup>, which would explain, in turn, Washington’s recent problems in coordinating with its allies<sup>28</sup>.

China, thanks to its openness, has substantially improved its welfare levels, although without reaching the top four (7.3 deaths per 1,000 births), which would call into question its capacity for world leadership<sup>29</sup>.

North Korea, after the brutal impact of the famine at the end of the 20th century, would appear to be converging on well-being, which, despite sanctions and its nucle- arization, would disrupt assumptions of its imminent collapse<sup>30</sup>. The huge differential in terms of human development between South Korea (3.03) and North Korea (16.5), however, would make eventual reunification an extremely complex and costly project<sup>31</sup>.

Therefore, it could be initially concluded that the Sino-US Neo-Cold War would be overshadowing a Russian renaissance that could explain Moscow’s current deferred

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24 Todd, E. (1976). *Op. cit.*

25 Beyrer, C. and Page, K. (2019). Preventable losses: infant mortality increases in Venezuela. *The Lancet Global Health*. <https://www.sciencedirect.com/science/article/pii/S2214109X19300130>

26 “Vladimir Putin’s turnaround is spectacular in several respects. Thanks in large part to the control of hydrocarbons, it can ensure a reactivation of the economy, substantial wage increases, and an unquestionable improvement in living conditions, which, of course, endears it to the majority of the population”. Chaliand, G. (2013). *Vers un nouvel ordre du monde*. Seuil. P. 143.

27 Perhaps the result of the absence of universal healthcare: Chen, A., Oster, E. and Williams, H. (2014). Why is Infant Mortality Higher in the US than in Europe? <http://www.nber.org/papers/w20525.pdf>

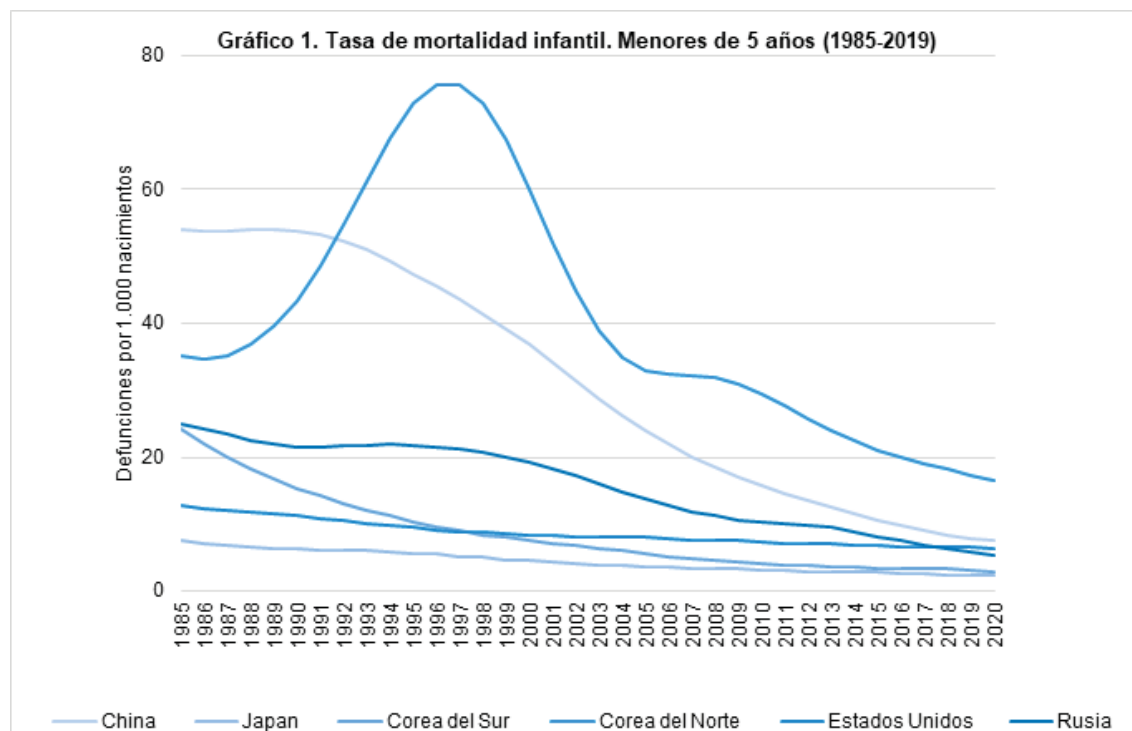
28 Several governments described their internal political problems, as if we were to feel sorry for them or had no internal political problems at all. Bolton, J. (2020). *Op. cit.*

29 This conclusion is also reached by Todd’s analysis of China’s demographic decline. Todd, E. (2022). China will not be a great power. *Nikkei (in Japanese)*. 23/1/2022.

30 “Recent satellite analysis also seems to confirm North Korea’s economic dynamism since 2000, contradicting Bank of Korea estimates”. Kim, K. (2022). The North Korean economy seen by satellite: Estimates of national performance, regional gaps based on nighttime light. *Journal of Asian Economics*. 78. <https://doi.org/10.1016/j.asieco.2021.101405>

31 Abt, F. (2014). *A Capitalist in North Korea*. Tokyo, Tuttle Publishing.

revanchism vis-à-vis the West with the Ukrainian conflict<sup>32</sup>. However, as will be discussed in another section, the Korean peninsula does not seem to be, for the time being, a favourable scenario<sup>33</sup>.



Graphic. Source: childmortality.org

The above analysis must be completed with the evolution of the suicide rate since its increase correlates with social dissatisfaction<sup>34</sup>. Examining GDP per capita and the suicide rate shows that Japan, China and Russia constitute a homogeneous triangle, where the suicide rate decreases as income increases, while, on the contrary, South Korea and the USA may be suffering a social crisis despite the improvement in GDP per capita<sup>35</sup>. Thus, South Korean animosity with Japan and U.S. animosity with China and Russia could have a domestic as well as an international origin, which would

32 “The desire to regain not the territories per se, but the position, power and status of the Russian-Soviet past, a vision typical of states that are heirs of a glorious past empire that they are trying to emulate”. Toal, G. (2016). *Near Abroad: Putin, the West, and the Contest over Ukraine and the Caucasus*. Oxford University Press. P. 34.

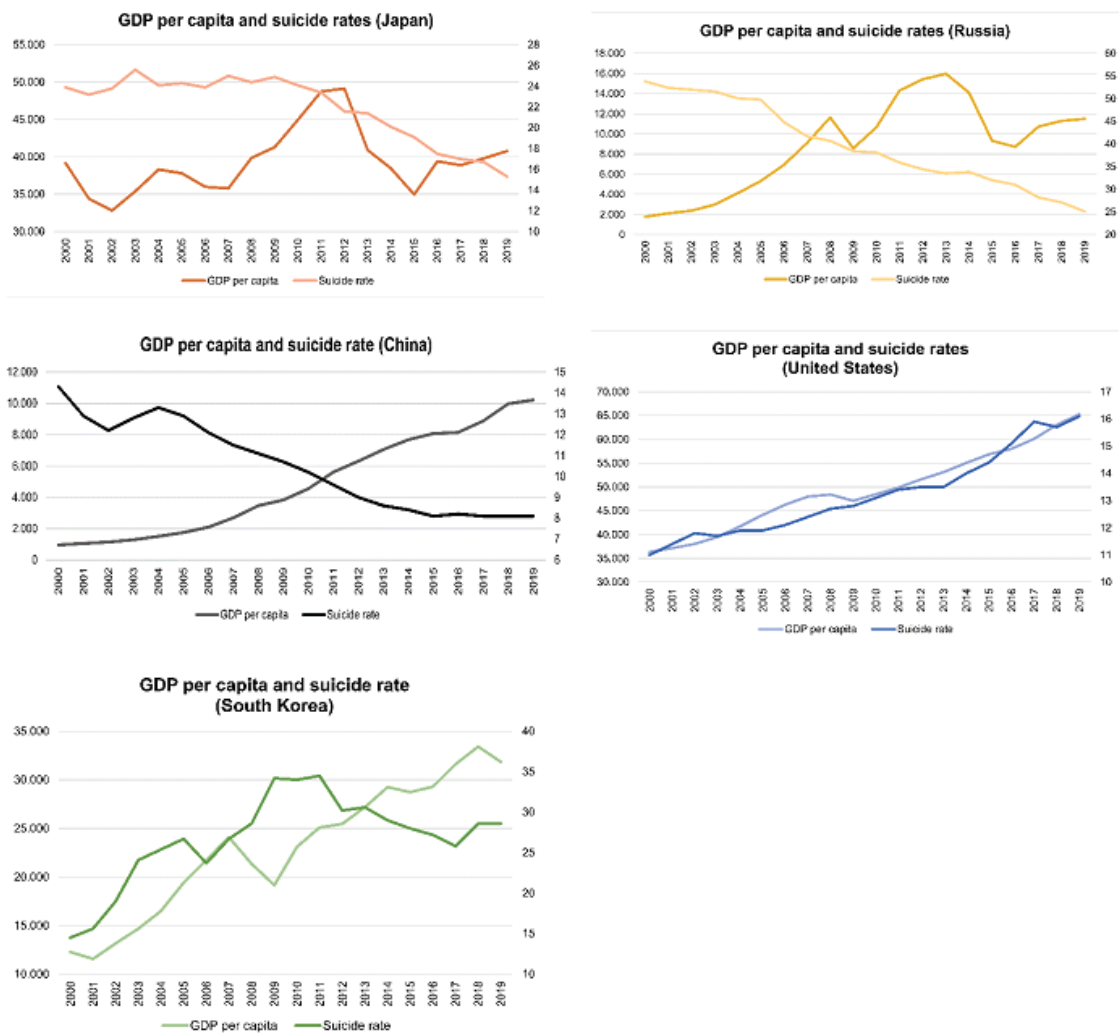
33 In fact, the Far East and Siberia-East regions have worse health indices than European Russia. Shartova, N., Tikunov, V. and Cheresnaya, O. (2021). Health disparities in Russia at the regional and global scales. *International journal for equity in health*, 20(1), 163. <https://doi.org/10.1186/s12939-021-01502-6>

34 Luo, F. et al. (2011). Impact of Business Cycles on US Suicide Rates, 1928-2007. *American Journal of Public Health*. 101 (6).

Kim, K. (2019). *Kankoku ikisugita shihon shugi 'mugen kyōsō shakai' no kunō. The suffering of the infinitely competitive society: capitalism that has gone too far in Korea*. (In Japanese). PHP.

35 The absence of North Korean data is revealing, which could mean a trend similar to the South Korean one, as happened in the USSR when it concealed its rising mortality and suicide figures.

legitimize Russian claims that peninsular instability has its origin in the South Korean-U.S. axis<sup>36</sup>.



Graphic 2. Source: World Bank. GDP per capita in USD. Suicides per 100,000 population. Data for North Korea not available.

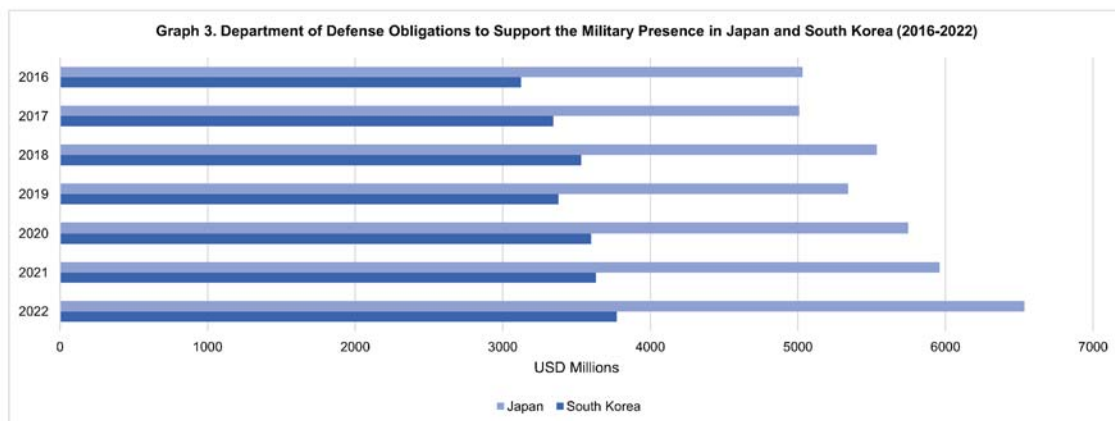
Therefore, under the visible ideological dichotomy between autocracy and democracy, there would be sociological affinities that could challenge military alliances, especially the Washington-Tokyo axis, and strengthen the Sino-Russian autocratic alliance, for its social stability, and the South Korean-US alliance, for its domestic instability, which could be channeled towards a common external enemy. In any case, demographic analysis points to the possibility of one of the scenarios most feared by US diplomacy: a Tokyo-Beijing-Mos-

36 Chung, C. (2021). Chinese, Russian diplomats accuse US of escalating tensions with North Korea. <https://www.nknews.org/2021/08/chinese-russian-diplomats-accuse-us-of-escalating-tensions-with-north-korea/>

cow axis<sup>37</sup>. It is therefore important to analyse the links between the states that make up each of the ideological triangles in order to verify the plausibility of these hypotheses.

### The democratic-capitalist bloc

The triangle between the US, Japan and South Korea is characterised by strong military and economic integration thanks to the unquestionable *postbellum* US leadership, which was able to recast its Asian allies practically in its image and likeness, setting them up as continental democratic-capitalist enclaves. However, the triangular relationship is scalene due to a double asymmetry: the economic-military preeminence of the Washington-Tokyo axis and the already analysed U.S.-South Korean social tension. It was the need to preserve a demilitarised and democratic Japan that motivated the U.S. intervention in Korea, and it is now considered the best ally and *the cornerstone of peace in East Asia*<sup>38</sup>. This asymmetry is explained, in the military sphere, by two main reasons: the geostrategic location of the archipelago (which may limit China's and Russia's access to the Pacific) and its status as a U.S. protectorate, since Japan is a nation with Armed Forces only for Self-Defense by constitutional mandate. For this reason, the US has committed substantial amounts in recent years to cover Japan's defence expenditures, supplemented by a 60 percent contribution



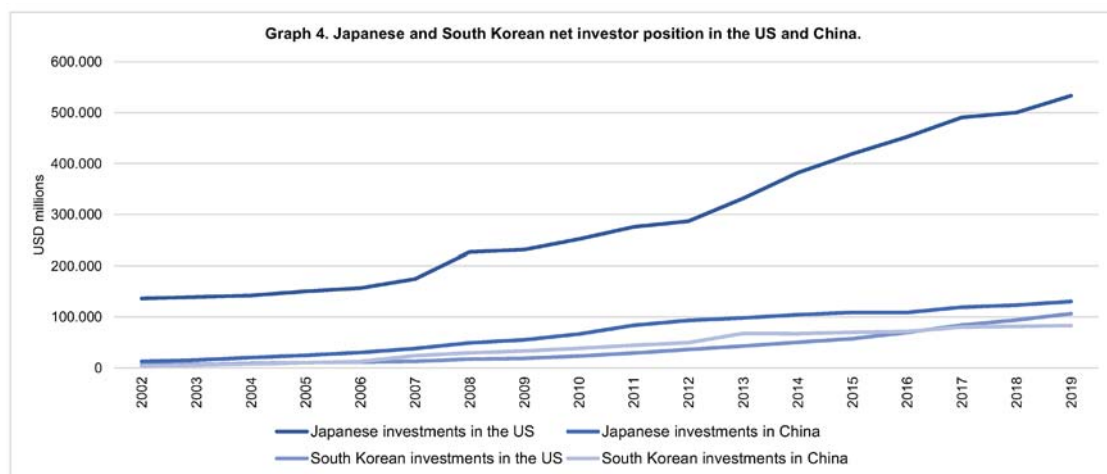
Graphic 3. Source: U.S. Department of Defense (2022).

37 A Beijing-Tokyo axis under an Asianist cloak, although geographically limited, was already considered more dangerous to the US than a Sino-Russian-Iranian anti-hegemonic bloc. Brzezinski, Z. (1997). *The Grand Chessboard. American Primacy and its Geostrategic Imperatives*. Basic Books. P. 71.

38 According to the State Department, Japan is the cornerstone of continental peace and South Korea is a lynchpin of security and peace on the Korean peninsula. Gao. (2021). *Benefits and Costs Associated with the U.S. Military Presence in Japan and South Korea*. P. 4. <https://www.gao.gov/products/gao-21-270>

from the Japanese government<sup>39</sup>. In the case of Seoul, on the other hand, the numbers are lower in part because the U.S. troops stationed there are also lower (28,500 in South Korea compared to 55,000 in Japan).

This asymmetry also holds in the economic sphere, with Japanese investments in the US being much higher than those of South Korea. In fact, Japan has greater investments in the US than in China (as opposed to trade traffic, which is more even), which strengthens the economic link and aligns the foreign policy interests of both countries. South Korea, on the other hand, presents a more ambiguous picture; despite framing itself in the democratic-capitalist triangle, its investments in China, until the announcement in 2016 of the deployment on its territory of the THAAD (Terminal High Altitude Area Defense missile) system, had been higher than those of the United States, which

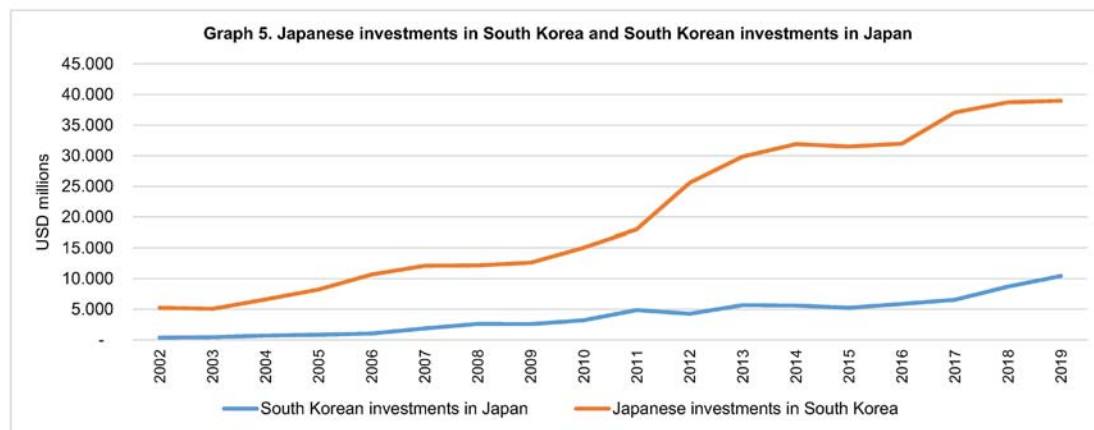


Graphic 4. Source: [www.investmentmap.org](http://www.investmentmap.org)

had led to misgivings in Washington about its reliability as an ally. With the deployment of THAAD, however, Seoul reaffirmed its Western commitment and seems to have initiated a process of disengagement with China, in line with the U.S. strategy.

However, to ensure triangular cohesion, it will be crucial to strengthen the Tokyo-Seoul axis, which has been badly damaged by historical grievances that the current model does not mitigate, but rather perpetuates. As stated by Kim Dae-Jung, South Korean president, *Japan has become a superpower without reflecting on its past mistakes; how can its neighbour Korea not worry? It is natural for Korea to be suspicious of Japan and to wonder about the true intentions of its former colonizer*. The origin of the problem lies in the fact that when the current triangular architecture was established, South Korea was a fledgling nation, whose economic viability was even questioned, which weakened Seoul in the normalisation of

39 “Suddenly imposing full base funding on host countries would cause a political earthquake, possibly ending the permanent military presence”. González Martín, A. (2017). Los compromisos norteamericanos con Japón y Corea permanecen, los debates cambian [U.S. commitments to Japan and Korea remain, debates change]. [https://www.ieee.es/Galerias/fichero/docs\\_analisis/2017/DIEEEA21-2017\\_CompromisoEE\\_UU.\\_Japon\\_AGM.pdf](https://www.ieee.es/Galerias/fichero/docs_analisis/2017/DIEEEA21-2017_CompromisoEE_UU._Japon_AGM.pdf)



Graphic 5. Source: JETRO; Bank of Korea

diplomatic relations with Japan, its former coloniser, in critical aspects such as investments, war reparations or fishing<sup>40</sup>, a situation that is now changing<sup>41</sup>.

Indeed, although, despite their geographical proximity, they are still not major investment partners, as the US is for both, the evolution of the international investment position of both is clearly positive, since Korea has greatly reduced the differential while Japan has continued to invest in the peninsula, moving away from the initial quasi-colonial model. Therefore, despite recurrent diplomatic and media crises, investment flows, better than trade flows, would confirm that both countries are solid allies<sup>42</sup>.

The favourable view of Japan held by South Korean youth is another indicator of the strength of the South Korean-Japanese alliance is South Korean youth<sup>43</sup>, which has prompted a slight pro-Japanese attitudinal shift in society at large. Young people have been the group most exposed to globalisation and competition with China, which has led to a permanent dissatisfaction with the system,

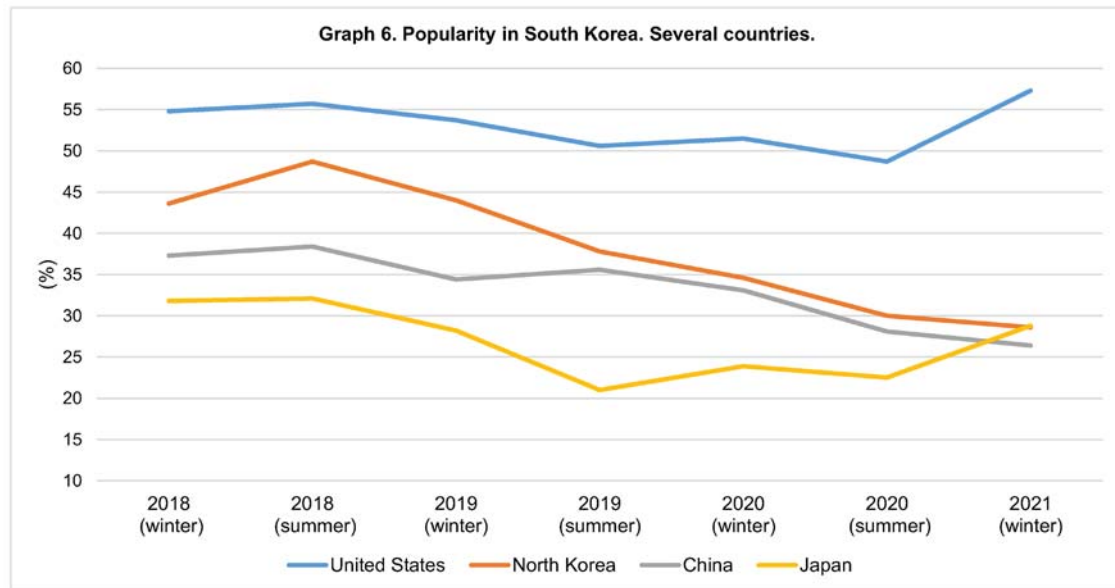
40 “They resentfully feel that the Korean government is adopting low-postured diplomacy toward Japan at the expense of excessive concessions in an attempt to overcome the current economic crisis stemming from inflation and foreign exchange shortages in Korea”. Telegram A-553 from the U.S. Embassy to the Department of State (1964). <https://history.state.gov/historicaldocuments/frus1964-68v29p1/d3>

41 Even Kim Dae-Jung himself, the opposition leader at the time, acknowledged the need for normalisation: “Surrounded by North Korea, China and the Soviet Union, South Korea did not have the option of antagonising Japan”. Kim, D-J. (2019). Op. cit., p. 86.

42 “South Korean-Japanese cooperation should be analysed by the number of times the two governments avoid confrontation in historical grievances rather than by the number of confrontations”. Cha, V. (2004). Japan-Korea Relations: Engagement from Strength. Center for Strategic & International Studies. [http://csis.org/files/media/csis/pubs/0402qjapan\\_korea.pdf](http://csis.org/files/media/csis/pubs/0402qjapan_korea.pdf)

43 Kim, K. (2019). Kankoku ikisugita shihon shugi ‘mugen kyōsō shakai’ no kunō. The suffering of the infinitely competitive society: capitalism that has gone too far in Korea. (In Japanese). PHP.

which they nicknamed *Hell Joseon* (the name of pre-modern Korea)<sup>44</sup>. On the other hand, Japanese youth, who have benefited from the ageing of the popula-



Graphic 6. Source: <https://www.sisain.co.kr/news/articleView.html?idxno=44821>

tion, which has provided them with new job opportunities, are less pessimistic about the future, which may partly explain their lower suicide rate<sup>45</sup>. In this regard, it is revealing that the new South Korean president, Yoon Suk-yeol, elected by the youth vote, has stated that *Seoul must recognise the strategic importance of Tokyo and that South Korea has succumbed to Chinese economic retaliation at the expense of its own security interests*<sup>46</sup>.

Consequently, there appears to be a South Korean investment and social base that should complement the strong triangular military cooperation. To this end, the US should continue to play a mediating role, although it would have to be the Asian leaders who decided to overcome historical differences, as France and Germany did after World War II, or the US and Japan itself<sup>47</sup>. As the multilateral military exercises have been little affected by diplomatic problems it has been suggested to use them as an

44 Park, K. (2021). South Korea Is No Country for Young People. *Foreign Policy*.

Yun, J.-W. (2010). The Myth of Confucian Capitalism in South Korea: Overworked Elderly and Underworked Youth. *Pacific Affairs*. 83(2), pp. 237–259.

45 Feigelman, W. et al. (2020). Examining whether South Korean and Japanese Views of Suicide and Death Help to Better Understand their Contrasting Suicide Patterns. *Suicidology Online* 2020. Vol11(1).

46 Yoon, S. (2022). South Korea Needs to Step Up. <https://www.foreignaffairs.com/articles/south-korea/2022-02-08/south-korea-needs-step>

47 “The Japanese-South Korean historical recognition gap will never be filled; only leader-to-leader relations can bring about a turning point in diplomatic relations”. Minegishi, H. (2019). *Nikkan no dansō*. (Japanese-South Korean discrepancies). (In Japanese). Nikkei. P. 229.

opportunity to foster South Korean-Japanese cooperation<sup>48</sup>. After all, South Korea is critically dependent on Japan for its security as its only regional ally, so its diplomacy should avoid a hypothetical Tokyo-Beijing-Moscow alliance based on latent Japanese anti-Americanism, which would regroup the states of the calm axis (with rising GDP per capita and falling suicide rate) and engulf Seoul<sup>49</sup>. Thus, over time, greater economic protectionism vis-à-vis China<sup>50</sup> and accelerated South Korean ageing could reduce social unrest and improve diplomatic relations with Japan almost naturally.

### The autocratic triangle: North Korea, China and Russia

The autocratic triangle, unlike the democratic-capitalist one, is more of an agglomerate than a compact economic-military bloc due to mutual suspicions, which could detract from its collective defensive capacity<sup>51</sup>. The absence of powerful economic ties between the triad limits their alliance to conjunctural circumstances, with external hostility seeming to tighten ties, as after Tiananmen (1989) or Ukraine (2022). Instead, globalisation has favoured their integration into the democratic-capitalist sphere, their source of technology and foreign exchange to finance their development, which has made possible a clear convergence in levels of well-being but which could also increase the likelihood of conflict as *war is a luxury of the rich nations*<sup>52</sup>. Thus, despite recent analyses<sup>53</sup>, a long-term Sino-Russian alliance seems unlikely for two reasons: it would isolate China from needed Western technology and capital, and it would tighten the Japanese-American alliance, which Beijing seeks to dilute<sup>54</sup>. Moreover, although economic analysis, based on GDP, seemed to draw a Sino-American “Thucydides Trap” scenario, anthropological analysis (declining infant mortality) shows a Russian-Amer-

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Analysing a specific case of distension: Mayumi Yasunaga, M. E. (2016). *Japón y Corea del Sur, posible deshielo tras 50 años de tensiones [Japan and South Korea, possible thaw after possible thaw after 50 years of tensions]*. [https://www.ieee.es/Galerias/fichero/docs\\_opinion/2016/DIEEEO57-2016\\_Japon\\_CoreaSur\\_Mayumi\\_Yasunaga.pdf](https://www.ieee.es/Galerias/fichero/docs_opinion/2016/DIEEEO57-2016_Japon_CoreaSur_Mayumi_Yasunaga.pdf)

48 Aoki, N. (2021). Takeaways From a Time of Increased Friction: South Korea-Japan Security Cooperation From 2015 to Present. Korea Economic Institute of America.

49 Less hypothetical could be a Moscow-Tokyo axis of collaboration to jointly develop the Russian Far East and thus enhance Japanese energy security. Kazuhiko, F. (2017). *Kokueki kara mita Roshia nyūmon (Introduction to Russia from the national interest) (in Japanese)*. PHP.

50 Todd, E. (2002). Op. cit. “China now weighs negatively on our welfare. We will have to have the courage to set up protectionist barriers against it and force it to adopt a more balanced mode of development”.

51 “China continues to be an uncomfortable neighbour. Many Russian officials continue to believe that China represents at least a potential rival”. Mankoff, J. (2009). *Russian Foreign Policy. The Return of Great Power Politics*. Rowman & Littlefield publishers. P. 195.

52 Bouthoul, G. (1967). Op. cit.

53 Schoen, D. and Kaylan, M. (2015). Op. it.

54 Brzezinski, Z. (1997). Op. cit.

ican Neo-Cold War, more European than Asian, which would reproduce a scenario similar to that of the Korean War, with Russian leadership mediated by China<sup>55</sup>.

What would be the current impediments to explicit Russian leadership in Asia? Mainly two: the anti-imperialism of Asian communism and the underdevelopment of Eastern Russia. For historical reasons, Asian communism, unlike European communism, focused more on anti-colonialism than on social injustice as its *leitmotif*. This desire for continental emancipation still today generates paradoxical alliances: it unites the two Koreas and China against Japan, still perceived as a colonial power, but also against Russia, for its occupations of Czechoslovakia (1968), Afghanistan (1979) and the recent ones of Crimea (2014) and Ukraine (2022), which discredit it morally and hinder its Asian consolidation<sup>56</sup>. On the other hand, the US, although formally the common enemy, seems in reality to be the desired ally; it was so for opening-up China in the 1970s, and could be so now for North Korea, in its quest for survival<sup>57</sup>. China, formally anti-American, would actually seek greater U.S. involvement to avoid being the only great power threatened by Pyongyang<sup>58</sup>, which in turn would seek to offer itself to Washington as a buffer state to curb Chinese expansionism<sup>59</sup>.

The underdevelopment of Asian Russia has also limited its continental leadership due to two main causes: the effects of the Sino-Soviet communist schism and the Korean division. The rivalry between Stalin and Mao for revolutionary leadership resulted in a permanent diplomatic crisis that prevented economic integration between neighbouring states ideologically close<sup>60</sup>. China's distancing from the US meant a rap-

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55 La guerra de Corea la inició Pyongyang con el beneplácito de Stalin y el apoyo militar chino [The Korean War was initiated by Pyongyang with Stalin's approval and Chinese military support]. Shen, Z. and Xia, Y. (2018). *A Misunderstood Friendship: Mao Zedong, Kim Il-sung, and Sino-North Korean relations, 1949-1976*. Columbia University Press.

56 Anticolonialism that had its Russian reflection in an anti-Chinese sentiment due to migratory problems in the bordering regions. Lukin, A. (2018). *China and Russia: The New Rapprochement*. Polity. P. 76.

57 At bottom, the Korean dispute seems to be a fratricidal rivalry to achieve a privileged relationship with a world leader, the US, which does not consider the peninsula strategic, so that Sino-North Korean relations would be conditioned by the volatility of Sino-US relations. Tianjiao, J. (2020). *Three Spikes and You Are Out? China-DPRK Relations after the Cold War and the US*. <https://theasanforum.org/three-spikes-and-you-are-out-china-dprk-relations-after-the-cold-war-and-the-us/>

58 China would have been the country most hated by Kim Jong Il, who declared that the Sino-North Korean border was as ideological as the 38th parallel. Jang, J-S. (2014). *Dear Leader: poet, spy, escapee: a look inside North Korea*. Simon & Schuster. Pp. 260-261.

59 Bulychev, G. (2021). *How to Put Korean Peace-Building Right: A View from Russia*. [https://www.globalasia.org/v14n02/feature/how-to-put-korean-peace-building-right-a-view-from-russia\\_georgy-bulychev](https://www.globalasia.org/v14n02/feature/how-to-put-korean-peace-building-right-a-view-from-russia_georgy-bulychev)

60 The Sino-Soviet partnerships were similar to the colonial ones, with Russian investments and Chinese operators. "This was a mistake; even an insult to the Chinese. Previously, the French, the British, and the Americans had settled in Chinese territory [and exploited it], and now the Soviets were also making their way into Chinese territory. It is unbelievable that Stalin would have done

prochement with Washington and its opening to the global market; currently China has more investments in the US than in Russia, its neighbour, an asymmetry that does not occur between the US and Canada, neighbouring democratic-capitalist nations. Although the crisis in Crimea (2014) and the War in Ukraine (2022) have brought Moscow closer to Beijing, the legacy of purely military and non-civilian investments in Asian Russia will hinder an economic integration that would strengthen their supposed alliance<sup>61</sup>.

In turn, the Korean division also seems to have been an insurmountable barrier to Russia's Asian expansion, as it has prevented it from benefiting from South Korean dynamism. The recent failure of the trans-Korean gas pipeline, despite Russia's need to diversify its export markets and South Korea's policy of decarbonisation, seems illustrative in this regard. The North Korean transit had already been considered more risky than the Ukrainian transit on the Russian-European gas pipeline<sup>62</sup> and, in fact, Pyongyang, despite getting Russia to write off 90% of its debt in exchange for accepting the project<sup>63</sup>, continued with its nuclearization, which also led to US and UN sanctions and the abandonment of a project pending since the 1980s<sup>64</sup>. The disagreement over North Korean fishing banks would be another example, as they could generate synergies between the Russian, Chinese and South Korean fishing fleets with North Korean labour and Japanese manufacturing. China is currently taking advantage of North Korea's inability to process its catches, which could lead to a regional conflict<sup>65</sup>.

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this!". Khrushchev, S. (2007). *Memoirs of Nikita Khrushchev. Statesman*. The Pennsylvania State University Press. P. 402.

61 "If Moscow ever had illusions about replacing the West with China, they have now all but dissipated. China may be a large market for Russia's natural resources, but it lacks the advanced equipment, technologies and expertise needed to tap the riches of the Russian Far East. These can often be found only in the West and its allies such as Japan and South Korea". Lukin, A. and Rozman, G. (2018). *The Russian Far East: Positive Scenarios and Negative Scenarios*. In Rozman, G. and Radchenko, S. (eds). *International Relations and Asia's Northern Tier. Sino-Russia Relations, North Korea, and Mongolia*. Palgrave Macmillan. <https://doi.org/10.1007/978-981-10-3144-1>

62 Lee, Y. (2013). Potential risks of the Russia-North Korea-South Korea gas pipeline: Is there any lesson Seoul can learn from the Russia-Ukraine gas disputes? *Asian Survey*. 53 (3), pp. 584-606. <https://doi.org/10.1525/as.2013.53.3.584>

63 <https://uk.reuters.com/article/russia-northkorea-debt/russia-writes-off-90-percent-of-north-koreadebt-eyes-gas-pipeline-idUKL6NoNB04L20140419>

64 Lee, Y. (2019). Political Viability of the Russia-North Korea-South Korea Gas Pipeline Project: An Analysis of the Role of the U.S. Energies. doi:10.3390/en12101895

65 It has even been suggested that a supranational body similar to the ECSC (European Coal and Steel Community) be created to foster cooperation. Fiori, A. and Passeri, A. (2015). Seventy Years after World War II: Comparing Europe and Northeast Asia's Security Architectures. *The Korean Journal of Defense Analysis*. 27 (2), pp. 233-245.

However, even if the peninsular division impedes Russian consolidation in Asia, Moscow (as well as Beijing) will continue to support Pyongyang by a sort of tacit Treaty of Tordesillas whereby *Moscow would cede to Beijing the affairs of East Asia while, in return, China would recognize Russia's leading role in the Middle East; the autocratic bloc would not be able to continue to support Pyongyang*<sup>66</sup>; the autocratic bloc should therefore be judged not by economic ties but by its geostrategic interests, which makes North Korea a voluntary buffer state thanks to its nuclearization and China the apparent regional leader. Pyongyang, aware of its strategic location, has consolidated a nuclear program that confers a privileged position on one of the poorest states in Asia, a phenomenon known as the *tyranny of the weak*<sup>67</sup>. Thanks to it, a structurally loss-making Stalinist system is perpetuated by obtaining unconditional donations that can be distributed by the regime itself without external interference, being preferred to generalised foreign investments, which would also mean a loss of political control over the distribution of national wealth<sup>68</sup>. Being a poor state, the meagre donations received are sufficient to preserve the regime; in fact, the greater the wealth, the greater the likelihood of revolution. A national capitalist transition *a la* China thus appears to be out of the question despite official announcements.

This tyranny of the weak would in turn limit China's real ability to influence Pyongyang<sup>69</sup>. *Caught between the sword (the CCP's political interests in resisting the US-Japan alliance) and the wall (China's national interests in opposing the North Korean nuclear program), Beijing has no choice but to continue its seemingly useful policy of milking the situation for as much political gain as possible that helps its rivalry with the US and Japan, while leaving the status quo of the Korean divide and the North Korean bomb adrift, waiting for a lucky break*<sup>70</sup>. Therefore, it is difficult to accept the hypothesis of imminent North Korean collapse, which has been unverified for more than three decades. Far from it, as its declining infant mortality rate seems to confirm, Pyongyang would be progressing thanks to advances in its light industry and agriculture, the latter with

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66 Lukin, A. (2019). Why Russia is standing aloof on the Korean Peninsula. <https://www.eastasiaforum.org/2019/02/16/why-russia-is-standing-aloof-on-the-korean-peninsula/>

67 Armstrong, C. K. (2013). *Tyranny of the weak: North Korea and the world, 1950-1992*. Cornell University Press.

68 "Without nuclear, North Korea would be just another impoverished country that would have to compete for donations with Sudan or Zimbabwe". Lankov, A. (2013). *The Real North Korea: Life and Politics in the Failed Stalinist Utopia*. Oxford University Press. P. 236.

69 Zhang, W. and Denton, G. L. (2019). The North Korean Nuclear Dilemma: Does China Have Leverage? *Journal of Asian Security and International Affairs*. 6(2), pp. 107-135. <https://doi.org/10.1177/2347797019842437>

70 Wang, F. L. (2017). *Between the bomb and the United States: China Faces the Nuclear North Korea*, in Kim, S. C. and Cohen, M. D. *North Korea and nuclear weapons: Entering the New Era of Deterrence*. Georgetown University Press.

better fertilizers, pesticides and seeds in recent years<sup>71</sup>. Moreover, *the new capitalist class seeks to join the existing elite, through marriage and commercial ties, rather than to undermine it*<sup>72</sup>.

Therefore, a North Korean denuclearization, as the US has sought for decades, also seems inconceivable, although, due to the high cost, Pyongyang could agree to limit its arsenal in exchange for security guarantees<sup>73</sup>. And it is at this point that Washington should have sought an agreement with Moscow, rather than with Beijing, as their interests coincide: both depend little on Pyongyang's stability, as the northern border area matters less to them. Moscow also has less trade with North Korea and would suffer less geopolitically than China with a reunified pro-US peninsula<sup>74</sup>. The war in Ukraine is likely to make their understanding more difficult, leading to a de facto recognition of Pyongyang as a nuclear power, like Maoist China<sup>75</sup>, reviving a scenario of "confrontational stability" with a rising Russia<sup>76</sup>.

The regional outcome is likely to be a chain of strategic manipulations, in which, through interposed countries (China and North Korea), Russia will seek to gain a foothold in the East through shared anti-Americanism, while avoiding falling victim to Asian anti-imperialism<sup>77</sup>. The global impact could be widespread nuclear prolifer-

71 Kwon, T-J. (2017). Agriculture in North Korea in the Kim Jong-un Era: Evaluation and Prospect. Focus on Korean Peninsula. 41, pp. 9-19.

72 Tudor, D. and Pearson, J. (2015). North Korea confidential. Tuttle Publishing. P. 178.

73 Lankov, A. (2011). Why the United States will have to accept a nuclear North Korea. The Korean Journal of Defense Analysis. Vol. 21 (3), September, pp. 251-264. DOI: 10.1080/10163270903087147.

The U.S. threat to Pyongyang seems plausible: "I explained why and how a preemptive strike against North Korea's nuclear and ballistic missile programs would work; how we could use massive conventional bombs against Pyongyang's artillery north of the DMZ, which was threatening Seoul, thus drastically reducing casualties". Bolton, J. (2020). *Op. cit.*

74 Bandow, D. (2021). Talk to Russia About North Korea. <https://nationalinterest.org/blog/korea-watch/talk-russia-about-north-korea-193227>

75 "After millions died in the famine that followed the catastrophic Great Leap Forward and amid the madness of the Cultural Revolution, incited by a zealous Mao, U.S. leaders wondered whether a regime as cruel, incompetent and capricious as Beijing's could be trusted with nuclear weapons". Ankit Panda, A. (2020). Kim Jong Un and the Bomb. Survival and Deterrence in North Korea. Oxford University Press. P. 25.

76 With no option to improve US-Russian relations and seeing South Korea unable to break its US dependence, Moscow sees Pyongyang as key to its great power positioning in the Asia-Pacific region, including as a signal to China that it is an independent force in regional geopolitics, as argued by Torkunov, A., Toloraya, G. and Diachkov, I. (2020). **Современная Корея: метаморфозы турбулентных лет (2008-2020 гг.)**. (Modern Korea: Metamorphosis of Turbulent Years) Mgimo-University. Ch. 15, pp. 323-55.

77 Chinese expansionism in East Asia and the Pacific even benefits Russia because it diverts U.S. attention and resources away from confrontation with Moscow. (...) Moscow is preparing to enjoy the spectacle of China and the United States fighting in Asia Pacific. Lukin, A. (2019). *Op. cit.*

ation by those buffer states that feel threatened by a superpower, especially after the Libyan and Ukrainian experiences<sup>78</sup>.

### False exogenous states: Australia and Pakistan

Although most analyses of Korea have focused on the Six-Party Talks, there are two forgotten states, Australia and Pakistan, which, indirectly, can condition regional alliances by being, along with Japan, direct beneficiaries of the Korean War. In both cases, history and geography have forged a sui generis foreign policy, defending national interests that seem removed from their cultural context. Australia, as an Anglo-Saxon stronghold in Asia-Pacific; Pakistan, as the Asian Muslim Israel<sup>79</sup>. Both nations were created on decolonized British territories where there was no previous indigenous culture to restore sovereignty to and which, from their origins, were pro-Western, especially pro-American<sup>80</sup>. However, geography has made them partners of reference in the Asia-Pacific; Australia, as a supplier of energy and raw materials to China and Japan; Pakistan as a Chinese ally in its rivalry with India and as a necessary partner in North Korean nuclearization. Because of this destabilising capacity in the complex framework of the Six-Party Talks, it is important to analyse its role in a possible Neo-Cold War.

The Anglo-Saxon stronghold in the Pacific has been a key U.S. ally since World War II, when the conflict deeply industrialised its economy in order to meet the needs of MacArthur's troops sent from Brisbane<sup>81</sup>. The first world conflagration had already exposed the weaknesses of the country, excessively dependent on British trade, and had forced it to establish an indigenous productive base, such as the automo-

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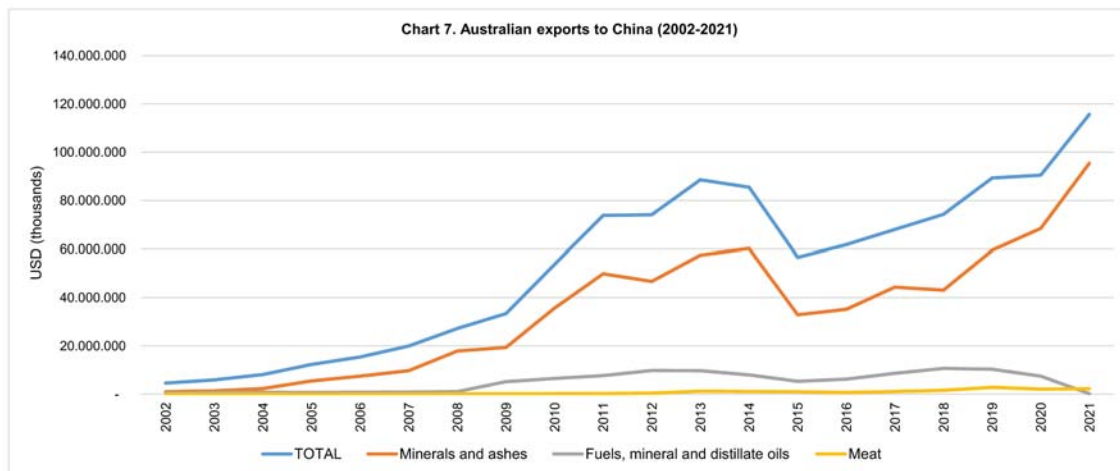
78 This correlation is questioned in the case of Libya: "Trump failed to understand that the unforeseen Arab Spring, which swept dramatically through the region beginning in 2011, was the reason for Qaddafi's subsequent fall, not his 2003 renunciation of nuclear weapons". Bolton, J. (2020). *Op. cit.* In any case, the US has managed to ensure that neither its neighbours (Canada and Mexico) nor its main Asian allies (Japan and South Korea) have nuclear arsenals, while China is surrounded by nuclear nations (Russia, India, Pakistan and North Korea).

79 Pakistan and Israel share the unique heritage of having been created after World War II as religiously defined states. Kumaraswamy, P. R. (1997). *The Strangely Parallel Careers of Israel and Pakistan*. Middle East Quarterly. June. Pp. 31-39.

80 The Pakistani case is perhaps the most surprising, but the Muslim population's suspicion of "godless communism" led its first head of government, Liaquat Ali Khan, to prefer a military alliance with Washington rather than with Moscow. Kasuri, K. M. (2015). *Neither a hawk nor a dove. An Insider's Account of Pakistan's Foreign Policy*. Penguin books.

81 Mclean, I. W. (2013). *Why Australia prospered: the shifting sources of economic growth*. Princeton University Press. An estimated 750,000 troops were deployed in a country of 7.3 million inhabitants.

tive industry, which made possible the subsequent development of aeronautics<sup>82</sup>. In addition, to reduce vulnerability to possible Japanese bombing, industrial capacity



Graphic 7. Source: <https://www.trademap.org>

was spread throughout the country, especially benefiting the south (Adelaide), and access to soft U.S. credit was facilitated so that, after the end of hostilities, Australia improved its international financial position<sup>83</sup>. The subsequent Korean War also benefited the country with a wool export boom, followed by a mineral boom driven by Asian industrialization. Thus, Australia, in war or peace, has benefited from the continental vicissitudes of recent decades, consolidating an extremely resilient economy as a supplier of raw materials to major regional economies.

It is this strength that enables Australia to stand up to its main trading partners (Japan during World War II and China today). When, for example, Canberra called for an independent investigation into the origin of Covid-19, Beijing responded with a boycott, discouraging tourists and students from travelling to Australia, its industries from buying Australian coal and introducing neo-protectionist measures on food. Although painful for several sectors, total exports to China increased by 24% in 2021 because Australian iron ore is an irreplaceable input in the Chinese economy, dependent on construction and manufacturing exports<sup>84</sup>.

Australia is also a critical energy supplier in the region. In 2018-19, Japan purchased 45 percent of the total value of Australian thermal coal exported, followed by China (16%) and South Korea (15%). Australia is the second-largest supplier of thermal coal

82 “Without its automotive industry, Australia would not have been able to build aircraft on the scale achieved at the height of the war”. Mellor, D. P. (1958). *The Role of Science and Industry: Australia in the War of 1939–1945*. Series Four, Civil. Vol. V. Australian War Memorial. P. 394.

83 Butlin, S. J. and C. Schedvin, B. (1977). *War Economy 1942- 1945*. Australian War Memorial.

84 Coyne, J., Savage, G. and Shoebridge, M. (2021). *Op. cit.*, p. 15.

to China (26%), after Indonesia (46%)<sup>85</sup>, but Indonesian coal is more polluting and of poorer quality<sup>86</sup>, allowing it to be blended with Chinese coal, but at the cost of increasing air pollution (58% of Chinese primary energy is coal) and tariffs<sup>87</sup>. Therefore, the most realistic alternative to simultaneously decarbonise and improve Chinese energy security would be Russian natural gas<sup>88</sup>. As long as this profound structural change is not undertaken, Australia will continue to be able to condition Beijing's competitiveness and foreign policy. Moreover, the Chinese veto has allowed for increased exports of Australian coal to India, the largest market (26% share in 2020) which is also expected to overtake China as the world's largest consumer of met coal<sup>89</sup> which could further benefit Australia as India is a Western ally. Add to this economic strength the new nuclear naval capabilities agreed with Washington within the AUKUS alliance, and Australia will be a key U.S. partner in a Neo-Cold War context<sup>90</sup>.

In strategic analyses of the Korean peninsula (and East Asia), the fundamental role played by Pakistan in the current balance of power situation is often forgotten, a surprising circumstance considering its close military collaboration with North Korea. Both countries have experienced a similar situation of international isolation and are the only nations that, despite the small size of their economies, have achieved nuclear status. Ideologically opposed in its origins, since Pakistan fought on the South Korean side (which brought it huge profits from cotton and jute exports)<sup>91</sup>, it was Zulfikar Ali Bhutto's socialism that established the Pyongyang-Islamabad connection, which has persisted due to the importance of the Pakistani military establishment, the only stable institution in a country of fragile democracy<sup>92</sup>. Precisely the social militarisation of

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85 BP Statistical Review of World Energy 2020.

86 Indonesian sub-bituminous coal generates higher CO<sub>2</sub> levels than Australian bituminous coals. Campbell, M. (2008). Coal Quality Effects on CO<sub>2</sub> Emissions. <http://www.acps.com.au/assets/Uploads/ACPS-Coal-Quality-Effects-on-CO2-Emissions-Revised-130908.pdf>

87 Chinese coal (Qinhuangdao FOB) trades on average 14% above the international average price; since the Australian coal import ban, the differential has increased to 38%.

International Energy Agency. (2020). *Coal 2021: Analysis and forecast to 2024*. P. 75. <https://iea.blob.core.windows.net/assets/fid724d4-a753-4336-9f6e-64679fa23bbf/Coal2021.pdf>

88 Rozman, G. and Radchenko, S. (eds). (2018). *International Relations and Asia's Northern Tier. Sino-Russia Relations, North Korea, and Mongolia*. Palgrave Macmillan. <https://doi.org/10.1007/978-981-10-3144-1>

89 International Energy Agency. (2020). Op. cit.

90 Mackinlay, A. (2022). AUKUS: la perspectiva de Australia [AUKUS: Australia's perspective]. IEEE Opinion Paper 13/2022. [https://www.ieee.es/Galerias/fichero/docs\\_opinion/2022/DIEEEO13\\_2022\\_ALEMAC\\_Australia.pdf](https://www.ieee.es/Galerias/fichero/docs_opinion/2022/DIEEEO13_2022_ALEMAC_Australia.pdf)

91 Haqqani, H. (2018). *Reimagining Pakistan: transforming a dysfunctional nuclear state*. HarperCollins.

92 Military dominance over Pakistan's political leadership is structural, rooted in the circumstances of Pakistan's birth. The country had inherited almost a third of British India's army, but only 17% of its revenue sources. Haqqani, H. (2018). Op. cit.

both States has been key, and the importance given to nuclear weapons as guarantors of international respect in decolonised States. Also their strong historical parallelism has led a Muslim nation and an atheist communist one to collaborate closely against their respective contemporary enemies; North and South Korea, like Pakistan and India, were founded simultaneously, making comparisons and competitiveness inevitable. Therefore, it should come as no surprise that it was Islamabad that transferred military nuclear technology to Pyongyang in exchange for ballistic missiles for its defence in the era of international sanctions<sup>93</sup>.

Another peculiarity of Pakistan has been its diplomatic ability to maintain good relations with the US and China simultaneously in tense times such as the Korean, Vietnam and Afghanistan wars. Its army also defends the doctrine of borrowed power of U.S. conventional and Chinese nuclear capabilities to neutralise Indian conventional and nuclear superiority<sup>94</sup>. For this reason, its authorities are optimistic about the current scenario in which there *are more Sino-US complementarities than in the past*<sup>95</sup>. In fact, Nixon's historic trip to Beijing was forged thanks to Pakistani mediation and the US even considered positive the Chinese support to the Afghan-Pakistani collaboration that would facilitate access to Turkmenistan and Uzbekistan, which would turn Pakistan into a point of contention and Pyongyang into one of insecurity<sup>96</sup> in spite of the intense Sino-Pakistani military collaboration; Islamabad is the largest customer for Chinese arms (including several submarines) and they have jointly developed the Al-Khalid tank and the JF-17 fighter jet. However, China has repeatedly stated that it does not want problems in its relations with Washington because of Pakistan<sup>97</sup>. It is precisely this rejection that has strengthened North Korean-Pakistani military collaboration, to the detriment of China. Pyongyang was able to test its Nodong ballistic technology in Pakistan, whose orography allowed frequent testing, and Islamabad gained an alternative supplier to Beijing, which lost its monopoly and leverage not only against Pakistan but also against North Korea, with whom it ended up competing<sup>98</sup>.

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93 Benazir Bhutto, during her visit to Pyongyang in 1993, allegedly provided Pakistani nuclear information in exchange for North Korean ballistic technology. Devasher, T. (2018). *Pakistan: at the helm*. HarperCollins.

Pakistán fue proveedor de tecnología nuclear militar también de Libia e Irán [*Pakistan was also a supplier of military nuclear technology to Libya and Iran*]. Elbaradei, M. (2011). *The Age of deception. Nuclear diplomacy in treacherous times*. Metropolitan Books. Chapter 7.

94 Devasher, T. (2016). *Pakistan: Courting the Abyss*. HarperCollins.

95 Kasuri, K. M. (2015). *Op. cit.*

96 Brzezinski, Z. (1997). *Op. cit.*, p. 149.

97 Hooper, E. and Yusuf, M. (2014). *Pakistán: escenarios futuros y contexto regional* [Pakistan: future scenarios and regional context]. <https://raco.cat/index.php/AnuarioCIDOB/article/download/257473/344564>

98 Khan, F. H. (2012). *Eating grass. The Making of the Pakistani Bomb*. Stanford Security Studies.

In the nuclear field, in the face of international opposition, Pyongyang relied on Pakistan to develop its own project<sup>99</sup>, acquiring not only its technology, but also adopting the same strategy. Thus, Islamabad would be an example of how Pyongyang might come to act once it consolidates its arsenal, since, *instead of seeing nuclear weapons as final guarantors against foreign invasion, Pakistan has seen them as weapons of pride that confer a higher international status and allow the country to demand resolution of disputes in its (own) terms*<sup>100</sup>. In other words, there would be a shift from a tyranny of the weak to a tyranny of the strong, which could call into question the current non-proliferation regime<sup>101</sup>.

## Conclusions

China's military and economic rise and the war in Ukraine seem to evoke a Neo-Cold War scenario between autocracies and democracies that could forge alliances between non-rival Western economies around an Anglo-Saxon core, the US, UK, Australia, complemented by Japan, India and Canada. The Korean peninsula, as a point of friction between the two ideological blocs, could be the theatre of renewed tensions.

The demographic analysis also reveals the existence of two blocks underlying the ideological ones: Tokyo-Beijing-Moscow, the one most feared by U.S. diplomacy, which brings together states where the increase in GDP is accompanied by a fall in the suicide rate (i.e. there would be a real improvement in social welfare), and a Washington-Seoul (possibly including Pyongyang<sup>102</sup>), where the increase in GDP does not prevent an increase in the suicide rate, which could be conditioning diplomatic policy in the region.

However, the democratic-capitalist triangle (US, South Korea and Japan) appears to be solidly integrated around Washington thanks to close investment ties with each other and US military deployment in the region, which perpetuates Japan's status as a protectorate of Washington and prevents a possible change of side by Tokyo. The diplomatic crises between the two Asian allies seem to reflect South Korean social tension, which will require political leadership in Seoul until the ageing population allows its pro-Japanese rather than pro-Chinese youth to gain a foothold in the workforce. The consolidation of Japan's pacifist policy would also help *postbellum*, which would avoid projecting an imperialist image.

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99 The non-proliferation regime was unable to control the transfer of uranium enrichment equipment to Pyongyang in the 1990s because the International Atomic Energy Agency (IAEA) lacks the authority to track supplies from non-member states such as Pakistan.

100 Haqqani, H. (2018). *Op. cit.*

101 To avoid this, the principle of full multinationalisation of the nuclear fuel cycle was proposed so that no State can develop capabilities autonomously. Elbaradei, M. (2011). *Op. cit.*, p. 317. Unfortunately, nuclearization as an identity sign of full sovereignty seems to be too strong.

102 The fact that North Korea does not publish its suicide figures could confirm this assumption.

The autocratic triangle (China, North Korea and Russia), on the other hand, should be judged more by their common anti-hegemonic interests than by their economic ties, since these are even closer with their capitalist partners than with each other. Also for its progress in welfare, since by considering only economic (GDP) and military (defence spending) indicators and not anthropological (infant mortality rate), analysts would have erred doubly: First, by drawing a “Thucydides trap” scenario between China and the US when in reality it would revive a Neo-Cold War scenario with Russia, as the war in Ukraine seems to corroborate. Second, assuming a North Korean collapse that seems more and more distant due to its nuclearization and Chinese aid. Indeed, Pyongyang’s survival could serve as an example to other buffer states, which would break the existing nuclear non-proliferation policy, unless prevented by a global U.S.-Russian agreement.

Finally, the role of Australia, the main supplier of energy to Japan, China and South Korea, and Pakistan, a supplier of military nuclear technology to Pyongyang, must be taken into account, as both could upset the fragile regional balance.

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