

From Strategic Ambiguity to Strategic Clarity? The Dynamics of South Korea's Navigation of US-China Competition

By Clint Work, PhD.

South Korean President Yoon Suk-yeol entered office eager to chart a more assertive path for South Korea beyond the immediate concern of deterrence and defense on the Korean Peninsula. Cognizant of [Washington's changed expectations](#) for South Korea, also known as the Republic of Korea (ROK), to take on an expanded regional and global role and primed to improve US-ROK alliance relations, Yoon and his advisors have made clear their intention to jettison strategic ambiguity and instead [opt for strategic clarity](#) amidst a growing US-China rivalry.

Yoon and key administration officials have criticized previous ROK President Moon Jae-in for his policy of ambiguity and equidistance between the United States and China as well as his administration's narrow focus on engagement with North Korea. [Yoon has committed to turn South Korea into a "global pivotal state,"](#) a diplomatic posture more commensurate with South Korea's standing as one of the world's foremost economies and democratic states. However, he must navigate challenges President Moon and all previous ROK presidents – progressive and conservative alike – have faced.

China's sheer proximity to the Korean Peninsula and Beijing's significant role in South Korea's geopolitical and economic outlook are immutable historical facts. Alongside significant investment ties, [Seoul's trade with China](#) is nearly as large as its trade with the US, Japan, and the EU combined. While President Moon's ASEAN-centric [New Southern Policy](#) was devised, partly, to mitigate economic dependence on China, Beijing remains central in Seoul's economic and thus strategic calculus. Seoul's [supply chain reliance](#) on China leaves it more exposed than the US or Japan; particularly in industries critical to South Korea's growth in the 21st century such as semiconductors, large-capacity batteries, rare earth metals and medical supplies.

Yoon and his advisors understand the risks of this dependence. [Beijing's economic coercion](#) against Seoul for its acceptance of the US deployment of the [THAAD anti-ballistic missile defense batteries](#) in 2017 is a not-so-distant memory. Nonetheless, Yoon and his team say they will participate in the US Indo-Pacific strategy while also crafting the ROK's own version; reinforce South Korea-US-Japan trilateral security cooperation; push for "normalization" of the existing US THAAD battery – which remained a "temporary installation" under the Moon administration – and possibly add more THAAD batteries to boost missile defense of the Seoul metropolitan area; and potentially move toward [greater participation in the Quad](#). These policies risk worsening Sino-ROK ties. Indeed, Chinese officials have already [warned South Korea](#) against accepting more THAAD deployments. Whether that means Beijing is prepared to torpedo economic and political relations with Seoul through another round of economic boycotts and coercion is uncertain, but Yoon cannot simply discount the possibility. Moreover, despite the [Yoon administration's eager entry](#) in the US-led Indo-Pacific Economic Framework ([IPEF](#)), the framework is currently more aspirational than real. It remains unclear whether IPEF or the alliance is equipped with a well-developed economic extended deterrence strategy in case Beijing repeats such economic coercion.

China's proximity and ties to both Koreas also mean Beijing plays a critical role in inter-Korean relations, regardless of their trajectory. While improved relations are unlikely, given current trends, Beijing could spoil diplomatic progress were it not involved or perceived its interests being undermined. Although

Dr. Clint Work,
Nonresident
Fellow, The Henry
L. Stimson Center's
38 North
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commentators often overstate Beijing's influence over Pyongyang, during periods of heightened tension on the peninsula China can restrain North Korea or at least help prevent lower-level provocations from escalating. Thus, maintaining and improving Sino-ROK military-to-military [lines of communication](#) and [strategic dialogue](#) at the highest levels of government is critical. The Yoon administration must put extra effort into maintaining such dialogue no matter how much relations might be tested otherwise.

During the election, Yoon's campaign played up differences between themselves and the Moon administration. However, President Moon did take some steps toward strategic clarity. While US-ROK alliance relations suffered during the Trump years, officials in Washington and Seoul established frameworks for greater cooperation based on principles clearly at odds with Beijing's more forceful and illiberal behavior, albeit without mentioning China by name. Most notable was the [2019 Future Defense Vision of the Republic of Korea \(ROK\)-U.S. Alliance](#) and in the [2020 U.S.-ROK Indo-Pacific Strategy-New Southern Policy Dialogue](#), both of which championed cooperation based on shared values.

Once alliance relations stabilized under President Biden, the Moon administration continued to [quietly but surely take sides in the US-China rivalry](#). A key example was the joint statement signed by Moon and Biden at their May 2021 summit meeting, which emphasized "the importance of preserving peace and stability in the Taiwan Strait," a noted departure from [Seoul's typically vague stance](#) on the issue. Presidents Yoon and Biden included the same language in their Joint Statement following their May 2022 summit. [Moon also participated](#) in Biden's exclusive 12-leader plenary during the Summit for Democracy, the [Global Supply China Resilience Summit](#), and signed the [Open Societies Statement](#)—which implicitly targets China—during the G-7 summit in June 2021. Yoon has built upon his predecessor's efforts by joining NATO's Cyber Defense Group—[much to Beijing's chagrin](#)—and was the first ROK president ever to [attend the NATO Summit](#). An important difference, though, is the Yoon administration is more outspoken and places greater emphasis on shared ROK and US objectives in Northeast Asia.

If Seoul adopts a firmer posture in relation to Beijing and does so in its immediate backyard—particularly in tightening ROK-US-Japan [trilateral security cooperation](#) and expanding the scale and scope of alliance combined military exercises in the region—it is certain to ruffle feathers. While South Korea's domestic politics will hinder efforts to tighten trilateral relations, specifically the Seoul-Tokyo side of the triangle, they may also provide Yoon with a firmer backstop against Chinese strongarming than in the past. Between 2015 and 2020, surveys show [an increase in negative attitudes toward China](#), rising from 37 to 75 percent.

While increasingly negative views of China are evident across a range of advanced economies, only in South Korea did younger people hold more unfavorable views toward China than previous generations. This negative sentiment is driven by a combination of factors, from anger over China's THAAD-related economic coercion to unease with China's assertive foreign policy, handling of COVID, overt suppression in Xinjiang and Hong Kong, and growing authoritarianism. To be clear, these sentiments indicate a degree of support for a more robust policy but not necessarily one of [outright containment](#) of China.

Conclusion

One should not overstate the degree to which the Yoon administration can or should rush toward strategic clarity. Furthermore, policymakers in Washington must refrain from pressuring Seoul to move too quickly or in a direction that undermines its interests. If the Yoon administration firmly pursues some of the policies mentioned above, it will likely face resistance and potentially a ham-handed response from China. Nevertheless, any attempts by Beijing to coerce Seoul or drive a wedge in the US-ROK alliance risks bringing about unintended consequences. Rather than force Seoul to change course, Beijing may very well catalyze the unity it fears, harden anti-China attitudes, and demonstrate for Seoul that strategic clarity is the surest path ahead.

Dr. Clint Work, Nonresident Fellow, The Henry L. Stimson Center's 38 North Program can be contacted at cwork@stimson.org.

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