

South Korea Politics & Policy

South Korea's president to seek assurances on chips and nuclear threat at Biden meeting

Washington to welcome ally as anxiety mounts over China decoupling and North Korea



Presidents Joe Biden of the US, left, and Yoon Suk Yeol of South Korea in Seoul in May. Yoon will be in Washington for a two-day state visit this week © Evan Vucci/AP

Christian Davies in Seoul and **Demetri Sevastopulo** in Washington 11 HOURS AGO

South Korean president Yoon Suk Yeol is set to receive a warm welcome in Washington this week, spending two days with his US counterpart Joe Biden on a state visit that will underline Seoul's position on the front lines of US economic and security concerns in Asia.

South Korea's manufacturing muscle and expertise in semiconductors and electric-vehicle batteries make the country a central part of the Biden administration's push to reduce dependence on China in critical technologies.

The large US military presence in [South Korea](#) also underscores Seoul's role in maintaining Washington's security posture in east Asia, particularly as North Korea's weapons programme gains increasing sophistication.

But the pomp of the state visit, which will include a summit on Wednesday before [Yoon](#) addresses a joint session of Congress a day later, also indicates Washington's acknowledgment of Seoul's concerns about the intensifying economic confrontation between the US and China, as well as a growing North Korean nuclear threat.

“On economic issues, Biden needs to reassure the South Koreans that his policies are also in their interests,” said Kim Hyun-wook, director-general of the Korea National

Diplomatic Academy. “On security, he needs to demonstrate a strong commitment to South Korea’s defence against the North, including if necessary through nuclear retaliation.”

Since Biden’s [visit to South Korea in May last year](#), when he faced concerns about shifting attention to the war in Ukraine, the US has passed two flagship bills that promise South Korean companies billions of dollars in subsidies.

But the benefits come with strings attached. Recipients of federal funds under the Chips and Science Act, which supports the US semiconductor sector, must accept restrictions on advanced chip production in China for 10 years.

South Korean officials were angered last year when it emerged that Hyundai electric cars manufactured in South Korea would not qualify for the tax credits under the Inflation Reduction Act — particularly since Biden had trumpeted a \$5.5bn investment by the carmaker in the US state of Georgia just months before.

In an [interview with the Financial Times](#) last year, South Korean trade minister Ahn Duk-geun said Hyundai had been “discriminated against” and warned that the legislation threatened to undermine trust in the US.

Seoul has also bristled at sweeping US export controls on chipmaking equipment intended to slow China’s development of cutting-edge technologies with military applications.

Leading South Korean chipmakers Samsung Electronics and SK Hynix, which both have facilities in China, have been granted one-year waivers from the restrictions, but the exemptions are due to expire in October.

South Korean officials privately express confidence that they are on track to secure meaningful concessions for the companies to continue operating in China while maintaining their technological advantage over their Chinese competitors.

But Yeo Han-koo, who served as South Korea’s trade minister until last year, said they had to contend with “ad hoc” US policy announcements concerning the semiconductor industry, which accounts for about 20 per cent of his country’s exports.

“No sooner than they have worked out how to deal with one measure, they have to work out how to deal with the next measure,” said Yeo.

This week, the FT reported that the White House had asked Seoul to urge chipmakers

[not to fill any market gap](#) in China that could result if Beijing banned US company Micron in retaliation for the export controls.

Yeo said the Biden administration had adopted “aggressive” industrial policies without properly co-ordinating with allies.

“It means that afterwards these partners have to scramble to find out what is going on, and then they have to negotiate all these exceptions and revisions,” said Yeo. “We understand where the US is coming from, but there needs to be a more systematic and sustainable approach.”



A North Korean intercontinental ballistic missile launched this month. Pyongyang has adopted a more aggressive nuclear doctrine, raising concerns in its southern neighbour © KCNA/KNS/dpa

Another source of mounting anxiety in Seoul to be addressed this week is [North Korea's rapidly advancing weapons programme](#). Pyongyang is developing lower-yield tactical and battlefield nuclear weapons that could be used to target its southern neighbour, and has adopted a more aggressive nuclear doctrine, prompting South Korea to seek greater security assurances from the US.

Karl Friedhoff at the Chicago Council on Global Affairs said North Korea's increasingly sophisticated threat, coupled with the possibility of former president Donald Trump's return to the White House in 2025, had “exacerbated longstanding South Korean fears of US abandonment”.

In recent months, the US has deployed fighter jets and B-52 bombers capable of carrying nuclear weapons to the Korean peninsula. But Go Myong-hyun, a senior fellow at the Asan Institute for Policy Studies in Seoul, said the Yoon administration was seeking more “concrete” assurances.

US national security adviser Jake Sullivan on Monday said the presidents would announce “major deliverables” on a range of issues and publish a joint statement on US commitments to South Korea’s defence in response to the rising threat from North Korea.

“We believe that that statement will send a very clear and demonstrable signal of the United States’ credibility when it comes to its extended deterrence commitments to the Republic of Korea and to the people of Korea,” said Sullivan.

One possibility is that South Korean officials will be given more insight to US thinking through a new nuclear consultation group.

Washington could also go further than before in terms of a public statement regarding its preparedness to use nuclear weapons in defence of South Korea. But experts said it was extremely unlikely that this would amount to a commitment to nuclear use.

South Korean leaders — including Yoon himself — [have openly speculated](#) that Seoul could one day pursue its own nuclear deterrent, a move strongly opposed by the US.

Sullivan said Seoul would continue to be “a good steward of its obligations” under the Nuclear Non-Proliferation Treaty, suggesting the US was reassured that South Korea would not try to develop its own nuclear weapons.