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Outlook on China's Foreign and Security Policy in Trump's Second Term and South Korea's Response

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Outlook on U.S.-China Relations in Trump's Second Term

Donald Trump has won the 2024 U.S. presidential election. Having campaigned on the slogan "Make America Great Again (MAGA)," Trump is expected to pursue a more aggressive foreign policy based on "America First" after taking office. The second Trump administration is anticipated to actively pursue a policy of direct pressure on China at the bilateral level rather than relying on checks and balances through solidarity with allies and partners. Unlike the focus on values like human rights and democracy, the administration's China policy will likely focus on economic issues.

With Republican control of both the Senate and the House of Representatives, the second Trump administration is expected to quickly enact legislation to revoke China's Most Favored Nation (MFN) status and use high tariffs as leverage to pressure China to address the trade imbalance.

In the short term, China is likely to closely monitor the foreign policy direction of the second Trump administration and attempt to negotiate with Trump. It may offer political support and cooperation on global issues, such as a Russia-Ukraine peace deal, along with economic incentives, such as large-scale purchases of U.S. goods and services. However, if the second Trump administration implements a unilateral pressure policy against China, such as imposing high tariffs or advancing broad economic decoupling, China will likely respond with countermeasures of equal strength. The Xi Jinping government has been publicly showcasing China's progress toward the realization of a "Great Revival of the Chinese Nation" and a "strong China" under Xi's rule, which has helped secure domestic unity and political stability. The Xi government is likely to blame the United States for economic downturns by sharply criticizing the Trump administration's protectionism and stirring domestic patriotic sentiment by controlling exports of raw materials such as rare earth or imposing equivalent tariffs on U.S. goods. This could further strain U.S.-China relations during Trump's second term, leading to a "strong versus strong" dynamic.

Outlook on China’s Foreign and Security Policy in Trump’s Second Term

1. Seeking to Expand Global Influence by Spreading Doubts about U.S. Global Leadership

Trump’s “America First” policy could fundamentally undermine the anti-China solidarity promoted by the Biden administration through various bilateral and multilateral frameworks. This could create rifts in security and economic cooperation between the United States and Europe. In this regard, China will likely view the second Trump term as an opportunity to incite conflict and division among liberal democracies and to challenge the “democracy versus authoritarianism” dichotomy championed by the West, including the United States. In response, China will actively seek to expand its own global influence by fueling doubts about U.S. global leadership in the international community. As part of this effort, China will seek to strengthen cooperation with the Global South. By expanding economic exchanges and promoting various global discourses that are distinct from those of the United States— such as the Community with a Shared Future for Mankind, the Global Security Initiative, the Global Development Initiative, and the Global Civilization Initiative—China will not only expand its influence in the Global South but also seek to create favorable public opinion in international organizations such as the United Nations.

2. Intensifying Appeasement toward South Korea to Deepen Fractures in Anti-China Solidarity

Beijing views Yoon’s values diplomacy as biased in favor of the United States. It also believes this foreign policy does not resonate with the public, citing the April 2024 general election results and Yoon’s low approval ratings. Despite rising anti-China sentiment in South Korea, public recognition remains that cooperation with China is important for economic recovery. Beijing’s recent visa waiver in November signaled internally and externally that it is committed to restoring bilateral ties and passed the buck to Yoon’s administration. If disagreements and conflicts between South Korea and the United States over defense cost-sharing and the North Korean nuclear issue arise during Trump’s second term, and if these tensions lead to dissatisfaction in South Korea with the Yoon administration—which has emphasized the ROK-U.S. alliance and values diplomacy—it could weaken the momentum of the Yoon administration’s foreign policy. This, in turn, might eventually lead to cracks in various small-scale and multilateral anti-China coalitions, such as the Indo-Pacific 4 (IP4: South Korea, Japan, Australia, and New Zealand) and the Quad.

3. Distancing Itself from North Korea and Avoiding Blame for the North Korean Nuclear Issue

The first Trump administration pressured China by repeatedly raising the issue of China's responsibility regarding the North Korean nuclear issue. North Korea is more likely to conduct a military provocation to increase its bargaining power with the United States. In that case, the second Trump administration might use this as an opportunity to intensify the focus on Chinese responsibility. In Trump's second term, China, which would have to face strong U.S. checks and pressures, would seek to distance itself from North Korea's military provocations and closer military ties with Russia to avoid its responsibility issue, but would also likely maintain its relationship with North Korea by defending its position in the international community. In doing so, China is expected to emphasize its differing stance from North Korea, improve relations with regional countries such as South Korea and Japan, and exploit fractures in both bilateral and multilateral security cooperation in the region.

4. Intensifies Offensive against Taiwan in Response to Weakening U.S. Willingness to Engage

China is paying close attention to the possibility of a weakening U.S. willingness to engage Taiwan during the second Trump administration. This term could bring disagreements and conflicts between the United States and Taiwan over issues such as semiconductors and military assistance. Given Trump's profit-driven mindset, this could lead to increased arms sales in Taiwan, but the U.S.-Taiwan relationship is expected to be weaker than under the Biden administration. China perceives that reduced U.S. involvement in the Taiwan issue will weaken the Democratic Progressive Party (DPP) government's commitment to independence. In response, China is likely to heighten security concerns and distrust of the United States within Taiwan through military provocations and psychological warfare while also seeking to gain the upper hand in Cross-Strait relations by waging public opinion campaigns on the Taiwan issue in the international community.

South Korea's Response

Since the ROK-China-Japan trilateral summit in May 2024, China has continued to demonstrate its willingness to restore ties with South Korea through the South Korea-China 2+2 Dialogue (June), the South Korea-China Future Friendship Forum (October), and a visa waiver measure (November). While these moves are ostensibly aimed at strengthening bilateral economic cooperation and people-to-people exchanges, they carry a political intention to exploit potential fractures in the anti-China coalition, particularly in light of anticipated disputes and conflicts during the second Trump Term. The South Korean government should recognize this and focus on the following points.

First, the South Korean government should prevent a narrative unfavorable to South Korea from taking shape at the bilateral level. While China has emphasized the importance of South Korea-China relations and taken steps to expand the dialogue and people-to-people exchanges to signal Beijing's commitment to improving the relationship, Beijing may attempt to link these efforts to South Korea's divided domestic politics and to potential conflicts within the ROK-U.S. alliance under Trump's second term to create favorable public opinion toward China within South Korea. Based on past experience with the THAAD incident, China could also use this to frame South Korea as responsible for any deterioration in the bilateral relationship. If such a narrative gains traction domestically and internationally, it could constrain South Korea's position and its policy options toward China in future bilateral relations.

Second, South Korea should host a South Korea-China summit on the sidelines of the 2025 APEC meeting and try to build consensus on North Korean denuclearization and curbing North Korea-China-Russia ties by using China's efforts to restore relations as a leverage. Xi Jinping is expected to visit South Korea during the APEC in November 2025. China knows that failing to hold a South Korea-China summit would deal a critical blow to the Yoon administration politically, and it might use this as leverage against South Korea. Since China is actively seeking to restore ties with South Korea, the South Korean government should take this opportunity to advocate the need for the summit proactively and seek early confirmation of the meeting. Furthermore, it should use the summit as an opportunity to clearly communicate South Korea's position on North Korean denuclearization, North Korea-China-Russia ties, and China's economic coercion while aiming to build consensus on these issues.

Third, South Korea should strengthen communication with the United States and like-minded countries to prevent unnecessary misunderstandings. Considering the China perceptions of the United States and like-minded countries in the region, increasing dialogue and engagement with China could raise concerns among them. Given South Korea's need to strengthen its alliance with the United States to deter North Korea's military provocations, South Korea must strengthen communication with the United States and its allies and partners in the region to avoid unnecessary misunderstandings as it expands dialogue and exchanges with China.

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