



Top 10 Risks Threatening Peace in Northeast Asia

September, 2024

Evaluated by 161 foreign policy and security experts
from Japan, the US, China, and South Korea



1. Executive Summary:

Top 10 Risks Threatening Peace in Northeast Asia in 2024

– As evaluated by 161 diplomacy and security experts
from Japan, the US, China, and South Korea –

Between July 12 and August 22 2024, The Genron NPO conducted a survey of diplomacy and security experts from Japan, the US, China, and South Korea on the top ten risks threatening the peace in Northeast Asia. The experts, numbering 161 in total, scored each threat based on two criteria. The results of the survey are published here under the title, *Top 10 Risks Threatening Peace in Northeast Asia in 2024*.

The biggest threat to peace in Northeast Asia in 2024 is the Korean Peninsula

This year the experts found that the greatest threat to peace in the region this year is the situation on the Korean Peninsula.

The experts gave the item titled “North Korea’s existence as a nuclear power and its continued missile launches and other military provocations” a score of 5.95 (out of 8 points maximum), putting it at number one for the second year running. However, a new item entered the top ten this year. “The emergence of a “New Cold War” structure between the US-centered bloc formed with Japan and South Korea on one side and China, Russia, and North Korea on the other” came in third place with a score of 5.26 points. “Russia and North Korea signing the Treaty on the Comprehensive Strategic Partnership, elevating their relationship to a military alliance” received a score of 5.19, putting in tenth place. These scores are evidence that the experts have their eyes on the current conflict structure on the Korean Peninsula.

In eighth place with 5.23 points, the experts selected “The worsening relationship between North and South Korea and increased tensions on the Korean Peninsula,” meaning that for the first time, of the top ten threat, four of them were related to the Korean Peninsula.

Analyzing the results by country, we find that Korean experts gave relatively higher

scores to these four items, illustrating that a stronger sense of crisis exists among them. In contrast, Chinese experts gave these items relatively low scores.

The US-China conflict is growing on many fronts, including in the military, economic, and cyberspace areas

Another element of this year's survey that stands out is the conflict between the US and China, which is expanding not only in the military sense, but on multiple fronts, from the economy to cyberspace.

This can be seen in the fact that items related to the conflict received high scores in all four countries, with "The deepening US-China conflict increasing economic and security tensions in Asia" in third place with 5.64 points, "Increased economy-based security and exclusion of China from supply chains" in sixth at 5.26 points, and "Increasingly frequent cyberattacks" in second place with 5.85 points.

Experts from China, Japan, and the US are very aware that this multifaceted exacerbation of the US-China conflict is posing a risk to the region.

However, like last year, Chinese experts expressed their concern about Japanese military expansion and US influence on Japanese foreign policy, and these two items were the highest scoring.

Sudden emergence of threats in the South China Sea

Related to the US-China Conflict, the survey found that the fourth greatest risk to peace in the region was "Chinese actions in the South China Sea creating tensions with Philippines and other neighboring countries," which rose suddenly into fourth place with 5.49 points.

There is a particularly high sense of urgency regarding the South China Sea among US and Japanese experts, among whom that area was selected as posing the number one threat to regional peace. In last year's survey, the South China Sea didn't even enter the top twenty-five in the initial questionnaire conducted on Japanese experts, so it wasn't included in the final survey conducted in all four countries. This suggests that concerns over the risks posed by events in the South China Sea have risen quickly over the previous year.

Regarding the Spratly Islands, the conflict between China and the Philippines is growing as both claim sovereignty over them. At one point, the two countries reached an agreement to lower tensions in those waters, but coast guard vessels from the two

countries continue to clash regularly. Due to increasing tension with China, Philippines has deepened defense cooperation with the US and Japan.

Japanese and South Korean experts more concerned about US election than the US and China

The US presidential election set for this fall entered the top ten this year with “The uncertainty regarding how the coming US presidential election will impact Northeast Asia” receiving 5.20 points and being ranked in ninth place by the experts.

The scores were particularly high in South Korea and Japan, both of which are US allies, with this item receiving 5.90 points from South Korean experts, and 5.62 points from Japanese experts. In comparison, the item received only 4.72 points in China, and only 4.57 in the US, where the election will take place, illustrating that there are very different levels of concern in the four countries.

Risks related to Taiwan fall out of the top ten

Two years ago, issues connected to Taiwan were seen as posing the biggest threats to peace in the region, but like last year, those items have fallen out of the top ten.

A “Taiwan emergency” received 4.28 points among the four countries, dropping it two places from last year to 23rd place. Concerns over “an incident occurring in the Taiwan Strait” are also comparatively low, with that item receiving 4.74 points and keeping it in 18th place. The reason for this is that while the experts from all four countries agree that the impact of any such conflict would be severe, the chance of one occurring in 2024 was deemed to be low.

China remains wary of the new Taiwanese president and the independence movement in the country, but since Lai Ching-te’s election, there has been no open signs of conflict, and dialogue has resumed between the US and China with a series of talks between defense officials and military personnel from both countries.

Risks in Northeast Asia in 2024		Score (out of 8)
1	North Korea's existence as a nuclear power, and its continued missile launches and other provocative actions	5.95
2	Increasingly frequent cyberattacks	5.85
3	The deepening US-China conflict increasing economic and security tensions in Asia	5.64
4	Chinese actions in the South China Sea creating tensions with Philippines and other neighboring countries	5.49
5	Lack of a unified global response to the protracted Ukraine War and the conflict in Gaza	5.39
6	"New Cold War" structure, the US-centered bloc versus China, Russia, and North Korea	5.26
7	Increased economic security and exclusion of China from supply chains	5.26
8	The worsening relationship between North and South Korea and increased tensions on the Korean Peninsula	5.23
9	The uncertainty regarding how the coming US presidential election will impact Northeast Asia	5.20
10	Russia and North Korea signing the Treaty on the Comprehensive Strategic Partnership	5.19
runner-up		
11	Increasing superpower tensions in cyberspace and outer space due to the lack of governance	5.09

***Reference: Ranking in 2023**

Rank	Risks in Northeast Asia in 2023
1	Missile launches and other military provocation by North Korea
2	North Korea as a nuclear power is already occurring
3	Deepening of the US-China conflict
4	The struggle between the US and China for digital hegemony
5	Increasingly frequent cyberattacks
6	Increased economic security and exclusion of China from supply chains
7	Too late to stop global warming, increase in extreme weather events
8	Growing Chinese nuclear arsenal/military power and lack of transparency
9	The growing conflict between China and Japan/US/South Korea
10	No functional "guardrails" in US-China crisis management dialogue
	(runner-up)
11	Domestic US political situation in the run-up to the presidential election

2. Survey Methodology

Assessment of the ten risks threatening peace in Northeast Asia was conducted in two stages.

First, a questionnaire was distributed to 1000 Japanese experts (388 respondents) who participate in discussions and other activities regarding Asian diplomacy conducted by Genron, and this allowed us to narrow down the list of items used to assess security risks in Northeast Asia to 25.

Survey Methodology

Survey Area		All over Japan
Survey Subjects		1,000 people who have engaged in the Genron NPO's projects and discussion formations before and are registered in the Genron NPO database
Survey Method		Internet Survey
Survey Period		June 29 to July 10, 2024
Validly collected samples		388 samples
Respondents	Gender	Male: 84.8%, Female:14.4%, Not to prefer to answer: 0.8%
	Occupation	Business owners and executives: 14.2% NPO/NGO workers: 4.7% Company employees: 9.3% Academics/ Researchers : 24.6% Media executives: 4.1% People from other organizations : 6.2% Media employees: 8.0% Students : 4.1% National public officials: 3.4% Self-employment : 6.7% Local public officials: 0.5% Others: 14.0% National Diet members: 0.0% Local Diet members: 0.3%
	Age	Under the age of 20: 1.0% The ages of 20 and 29: 2.6% The ages of 30 and 39: 7.0% The ages of 40 and 49: 9.8% The ages of 50 and 59: 25.3% The ages of 60 and 69: 24.5% The ages of 70 and 79: 19.1% Over the age of 80: 10.8%

Next, the survey was distributed to diplomacy and security experts in Japan, the US, China, and South Korea who evaluated each item according to two criteria (with Chinese respondents evaluating 24 items).

The two criteria used to assess each item were A, the likelihood of that risk resulting in conflict in Northeast Asia, and B, the impact and severity of any such conflict on peace in Northeast Asia.

This assessment was conducted between July 12 and August 22, 2024. Each item was

evaluated using a score out of four, and the two scores were then added together. A maximum of eight points was possible.

The scoring was conducted in collaboration with the thinktanks and security experts from the four countries participating in the Asia Peace Conference, and among the scorers were former government officials, military personnel, and security researchers.

A total of 143 experts participated in the survey: 50 from Japan, 51 from the US, 50 from China, and 10 from South Korea.

Diplomacy and Security Experts Survey Methodology

Survey Area	Japan, The United States, China, South Korea
Survey Subjects	Think tank researchers from the four countries participating in the “Asian Peace Conference”, former government officials, military officials, and university security experts and others
Survey Method	Internet Survey
Survey Period	July 12 to August 22, 2024
Validly collected samples	161 samples (Japan: 50, The U.S.: 51, China: 50, South Korea: 10)

3. Risks under Two Criteria

Criteria A What is the likelihood of a conflict erupting regarding below twenty five risks?

4 points: Conditions are highly likely to result in regional conflict or damage (extreme impact)

3 points: The potential for conflict/damage is high, but the situation is not yet critical (major impact)

2 points: There is concern about effects on regional peace (medium impact)

1 point: Not directly connected to regional peace, or impact would be insignificant (minor impact)

0 point: No impact

Criteria B What impact would conflict over an issue have, and how extensive would that impact be?

4 points: Conditions are highly likely to result in regional conflict or damage (extreme impact)

3 points: The potential for conflict/damage is high, but the situation is not yet critical (major impact)

2 points: There is concern about effects on regional peace (medium impact)

1 point: Not directly connected to regional peace, or impact would be insignificant (minor impact)

0 point: No impact

Criterion A: Likelihood of the risk resulting in conflict in Northeast Asia:

Criterion A was used to evaluate the likelihood that the risk could actually cause a conflict to erupt in Northeast Asia in 2024.

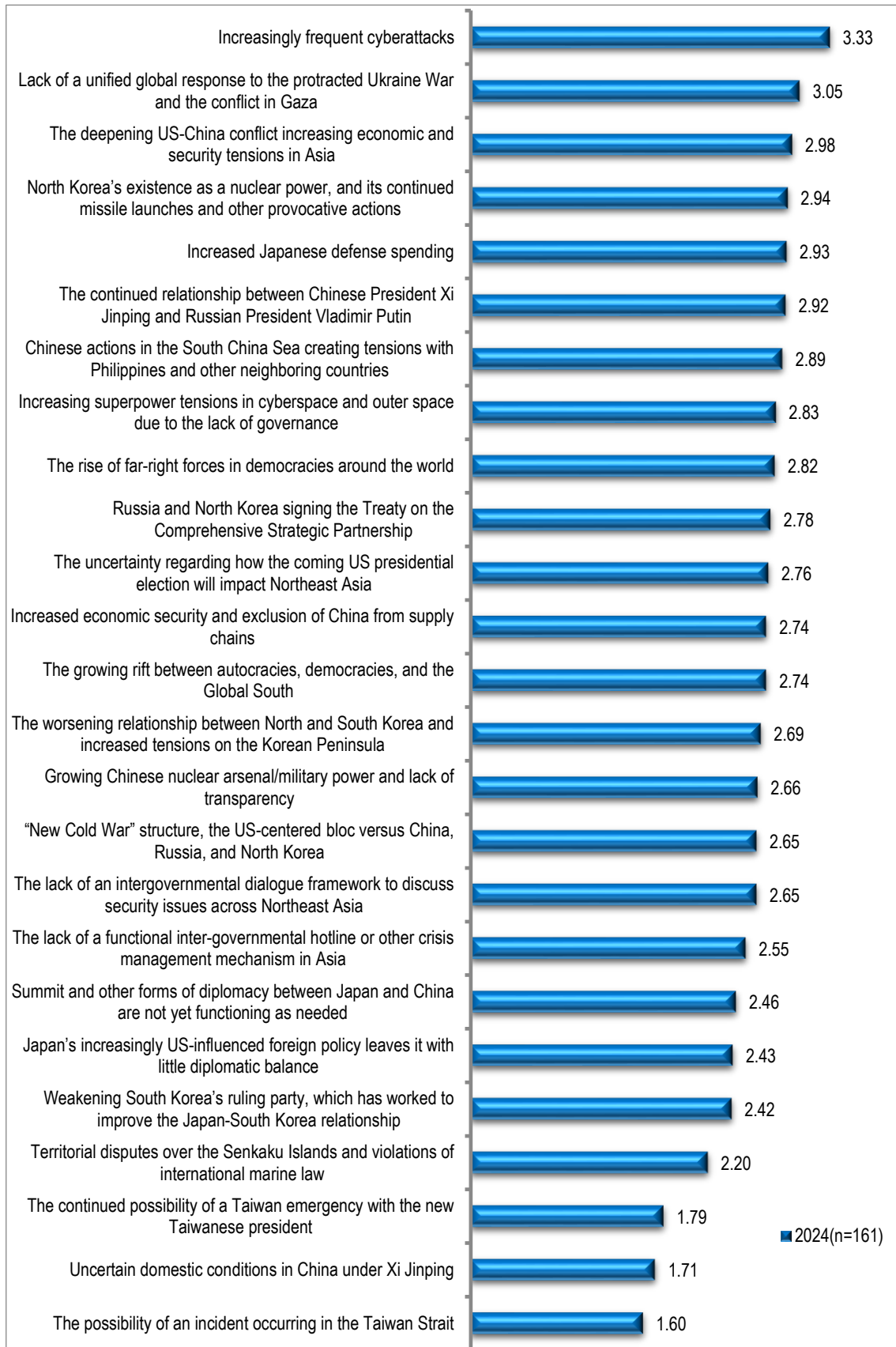
Four out of four points on the scale indicated that the risk has already resulted in conflict, with three points indicating that it is likely to occur in 2024 and therefore requires caution. Two points indicated a 50-50 chance of occurring in 2024.

Criterion B: Impact and severity of that impact on peace in Northeast Asia:

Criterion B evaluated the impact the above risks could have on peace in Northeast Asia, and the severity of that impact. It was also scored out of four points. Four points was defined as “extremely likely to cause conflict or damage in the region” or “extreme impact,” three points was defined as “likely to cause conflict or damage in the region but is not yet serious” or “major impact,” and two points signified “a concern that the situation may affect peace in the region” or “moderate impact.”

Ranking in Criteria A :

What is the likelihood of a conflict erupting regarding below twenty five risks?



Criterion A was used to evaluate the likelihood that the risk could actually cause conflict to erupt in Northeast Asia in 2024. Four out of four points on the scale indicated that the risk has already resulted in conflict, with three points indicating that it is likely to occur in 2024 and therefore requires caution. Two points indicated a 50-50 chance of occurring in 2024.

Under this criterion, “Increasingly frequent cyberattacks” was given the highest score by the combined evaluation of experts from the four countries at 3.33 points. This was followed by the “Global failure to unite against the protected invasion of Ukraine invasion and the conflict in Gaza” at 3.05 points, putting only these two items into the three-point level indicating that conflict is likely.

Caution reigns even in Northeast Asia, where experts believe that regular cyberattacks will remain an issue, and that there is no peaceful end in sight for the wars in Ukraine and Gaza.

Differences in opinion over the Korean Peninsula

Let us now turn to the Korean Peninsula, deemed in this survey to be home to the region’s biggest risks.

First, “North Korea’s existence as a nuclear power, and its continued missile launches and other provocative actions” received 2.94 points under criterion A, almost at the “likely to occur” level. Overall, the experts believe that the odds of issues connected to this item could result in conflict in 2024 are higher than even.

However, a look at the scores by country shows a difference in opinion. In South Korea, experts scored it at 3.70, implying that they believe North Korea’s actions are at a critical stage likely to lead to conflict. In comparison, others were more cautious in their assessments, with Japanese experts scoring it at 3.18, US experts at 2.80, and Chinese experts at 2.08 points.

For the other three items related to the Korean Peninsula, “The worsening relationship between North and South Korea and increased tensions on the Korean Peninsula” received 2.69 points, the “New Cold War” structure received 2.65 points, and the military alliance between Russia and North Korea received 2.78 points. These scores show that expert opinion considers the odds of these risks resulting in conflict to be even-to-high.

South Korean experts scored all of these items in the three-point range, while the experts from other countries were somewhat calmer about the situation.

Three other items that scored close to the three-point level (high likelihood of conflict).

The first at 2.98 points is “The deepening US-China conflict,” the second at 2.93 points was “Increased Japanese defense spending, and the third was “The continued relationship between Xi Jinping and Vladimir Putin at 2.92 points.

Responses from China and South Korean experts brought the score for the US-China conflict up to 2.98, and the score for “Increased Japanese defense spending” to 2.92. Chinese experts scored the latter particularly high at 3.64 points.

In contrast, “The continued relationship between Xi Jinping and Vladimir Putin” was scored highly by the experts in South Korea, the US, and China, resulting in the score of 2.92.

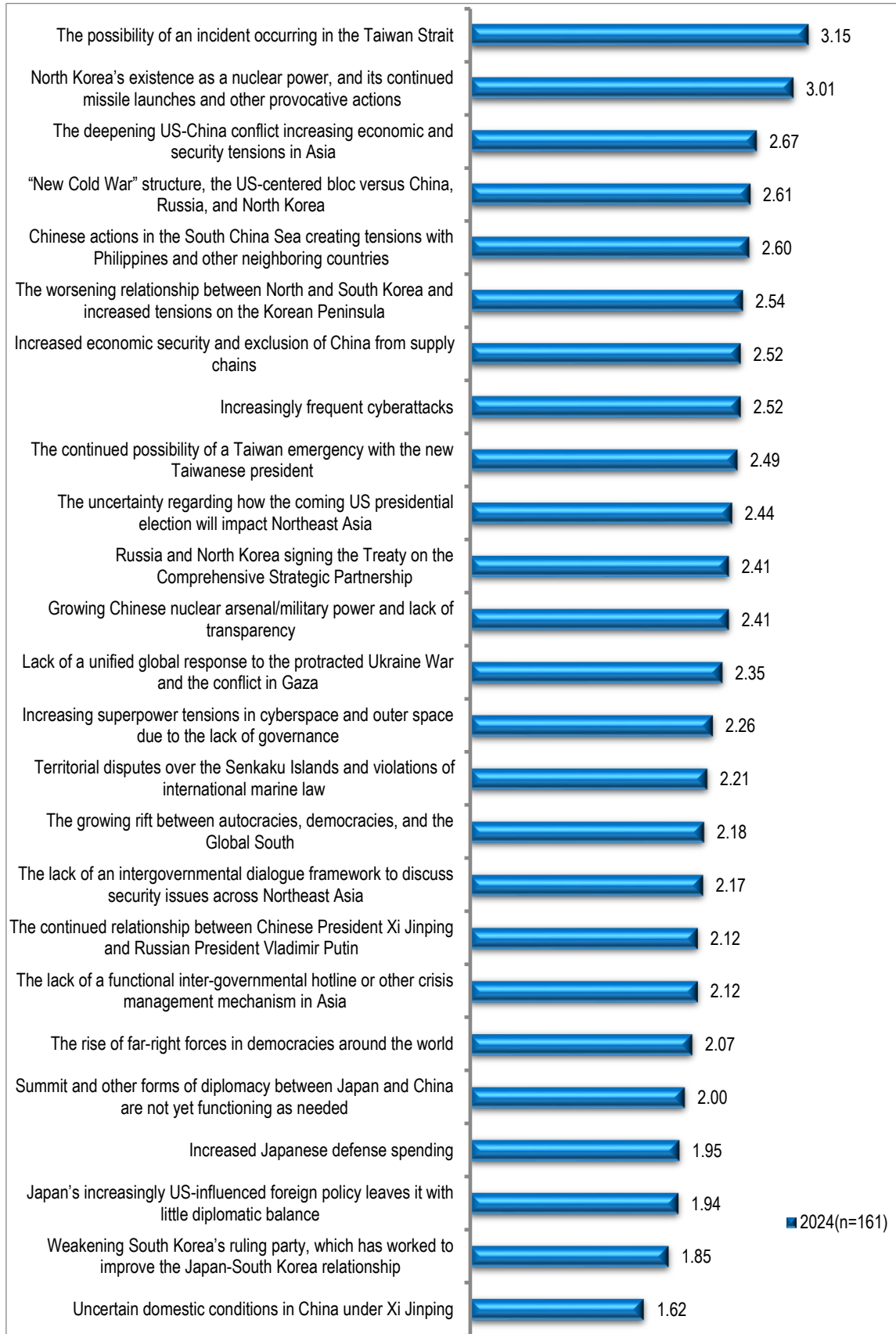
Japan, the US, and South Korea all give high odds of a conflict in South China Sea in 2024

Tensions over the South China Sea stand out in this year’s survey, receiving an overall score of 2.89 points. While outside of the “high likelihood” zone, analyzing the score by country find that Japanese and South Korean experts scored it at 3.2, while US experts scored it at 3.27, indicating their belief that a conflict in 2024 is likely. IN contrast, Chinese experts gave it a much lower score with only 1.9 points.

In comparison, while tensions over Taiwan remain high, it received the lowest score of all 25 items at 1.86 points, while the possibility of an incident in the Taiwan Strait scored outside the top 25 at 1.14 points, illustrating that experts feel the chance of a conflict or incident in 2024 is extremely low. The trend was seen in the scores for all four countries.

Ranking in Criteria B:

What impact would conflict over an issue have, and how extensive would that impact be?



Experts from all four countries see the Taiwan Strait and North Korea as genuine threats

Criterion B evaluated the impact the above risks could have on peace in Northeast Asia, and the severity of that impact.

It was also scored out of four points. Four points was defined as “extremely likely to cause conflict or damage in the region” or “extreme impact,” three points was defined as “likely to cause conflict or damage in the region but is not yet serious” or “major impact,” and two points signified “a concern that the situation may affect peace in the region” or “moderate impact.”

Of the 25 items measured under the criterion, the combined score of the experts from the four countries placed two risks at the “major impact” level with over three points: “The undeniable possibility of an incident occurring in the Taiwan Strait” at 3.15 points, and “North Korea’s existence as a nuclear power, and its continued missile launches and other provocative actions” at 3.1 points.

The experts evaluated these two risks surrounding the Taiwan Strait and North Korea are genuine, and with potentially serious impact, they must be avoided.

Tensions in the South China Sea and military expansion are also increasing regional risk

Under criterion B, two items stood out as being of higher risk overall according to the experts from each country: one, rising tensions do to actions in the South China Sea, and two, the ongoing arms race in Northeast Asia.

Differences in country-by-country scores lowered the overall ratings, but an increasing number of experts in some countries are rating the risk of regional conflict as high.

Tensions in the South China Sea ranked fifth among all countries at 2.6 points, making the perceived impact of a conflict erupting there as moderate, but as seen in the scores for criterion A, Chinese experts downplayed the magnitude of the risk, scoring it at 1.62 points, indicated their belief that a conflict there would not be major.

However, US experts put the South China Sea in second place under this criterion, and with a score of 2.94, they believe that the impact of a conflict occurring there would be greater than one resulting from the actions of North Korea.

Among Japanese experts, this was the highest scoring item under criterion B at 3.22 points, judging the impact of a conflict here as being a threat to regional peace.

Regarding military expansion in the region, the overall score for the item titled “Growing Chinese nuclear arsenal/military power and lack of transparency” was 2.41 points, putting it in twelfth place, but here too, the score of this was brought down by the low score given to it by Chinese experts. Looking at the score by country, Japanese experts put Chinese military expansion in third place with 3.14 points, US experts put it in sixth with 2.39 points, and South Korean experts put it in eighth with 2.7 points.

In comparison, Chinese experts placed “Increased Japanese defense spending” at second place with 2.82 points, with the impact of a conflict arising from that considered greater than moderate. However, the risk was given only 2 points by South Korean experts and 1.42 points by US experts, both scores lower than those given to China’s military expansion, and Japanese experts followed suit with a score of 1.56.

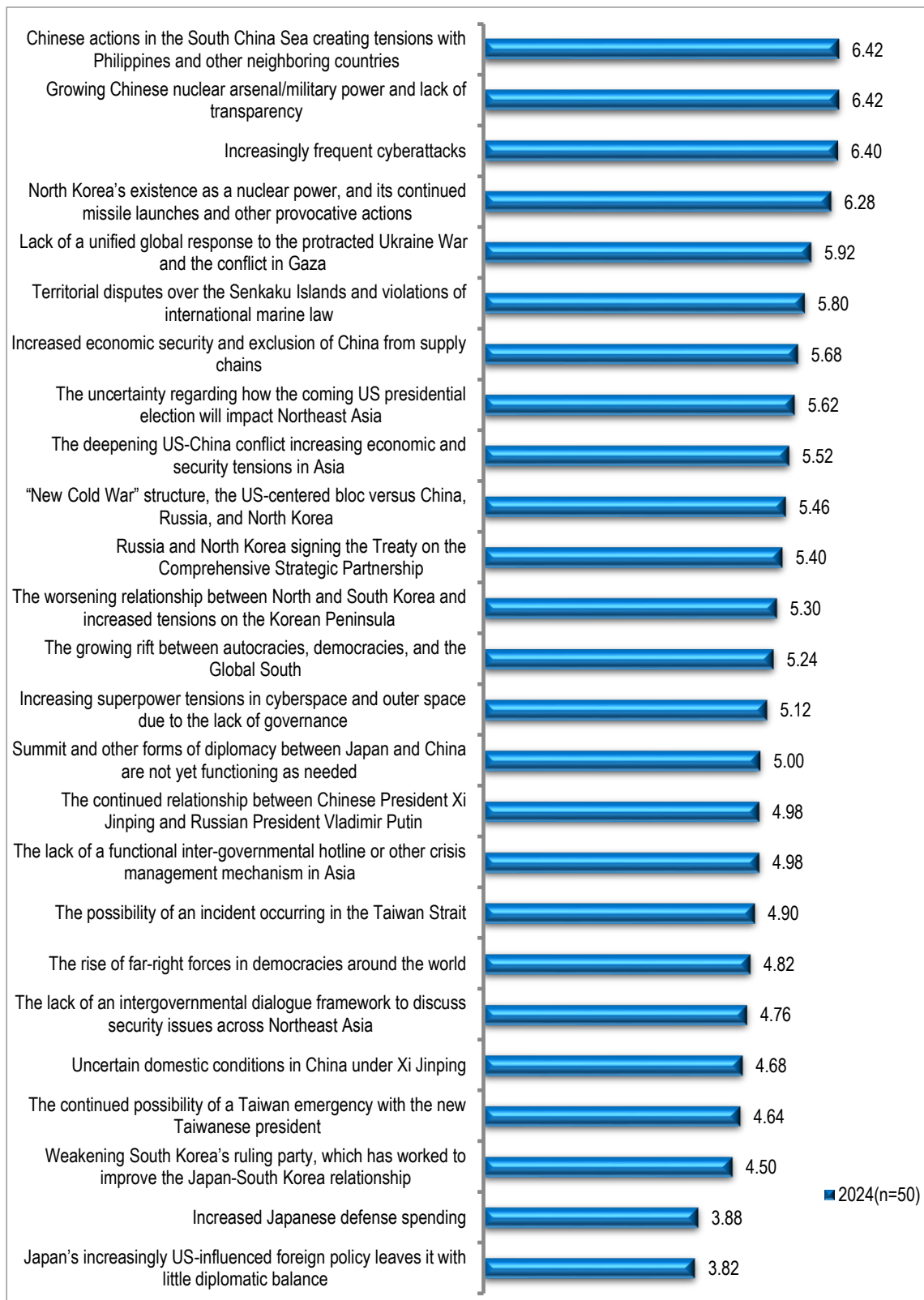
South Korea and Japan nervous about results of US presidential election

The US allies have shown particular concern about the upcoming presidential election in terms of the potential impact on peace in the region, with South Korean experts putting it at third place with 2.9 points. Japanese experts put it in eleventh place with 2.68 points, indicating their belief that the presidential election could have a moderate impact on peace.

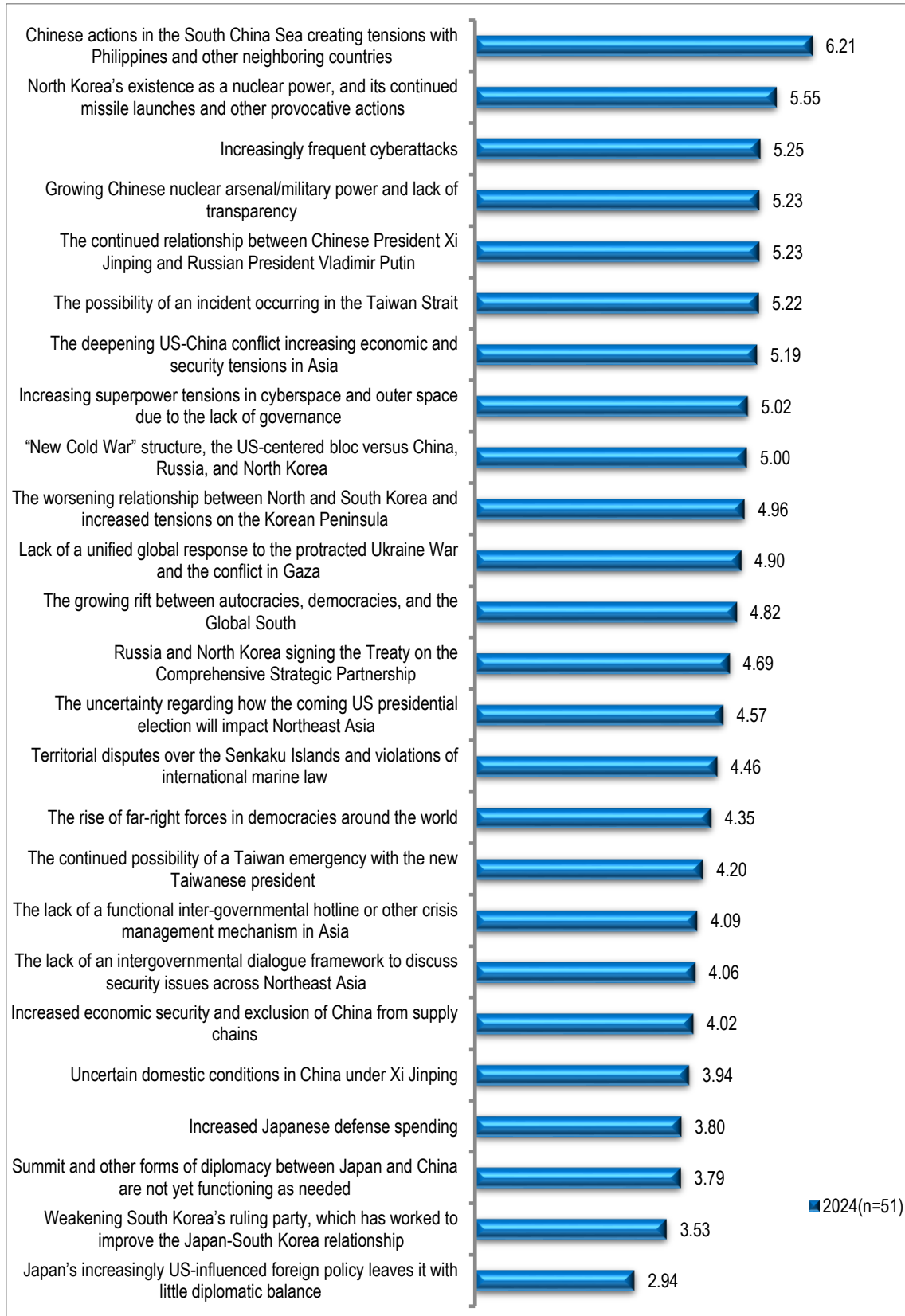
In contrast, Chinese experts place it at thirteenth place with 2.2 points, and US experts placed in sixteenth with 1.92 points.

4. Ranking by country (sum of Criteria A and B)

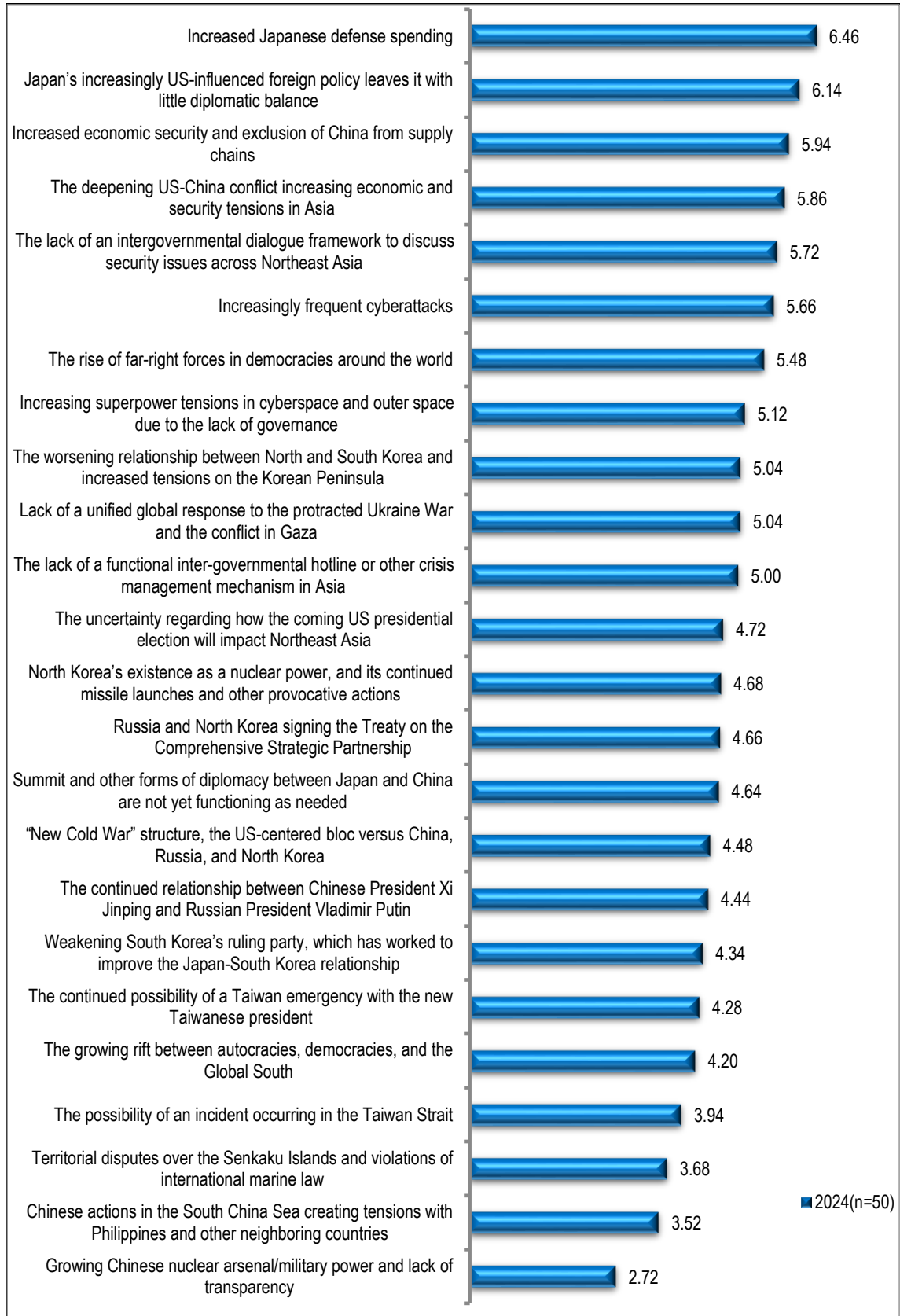
Japan (n=50)



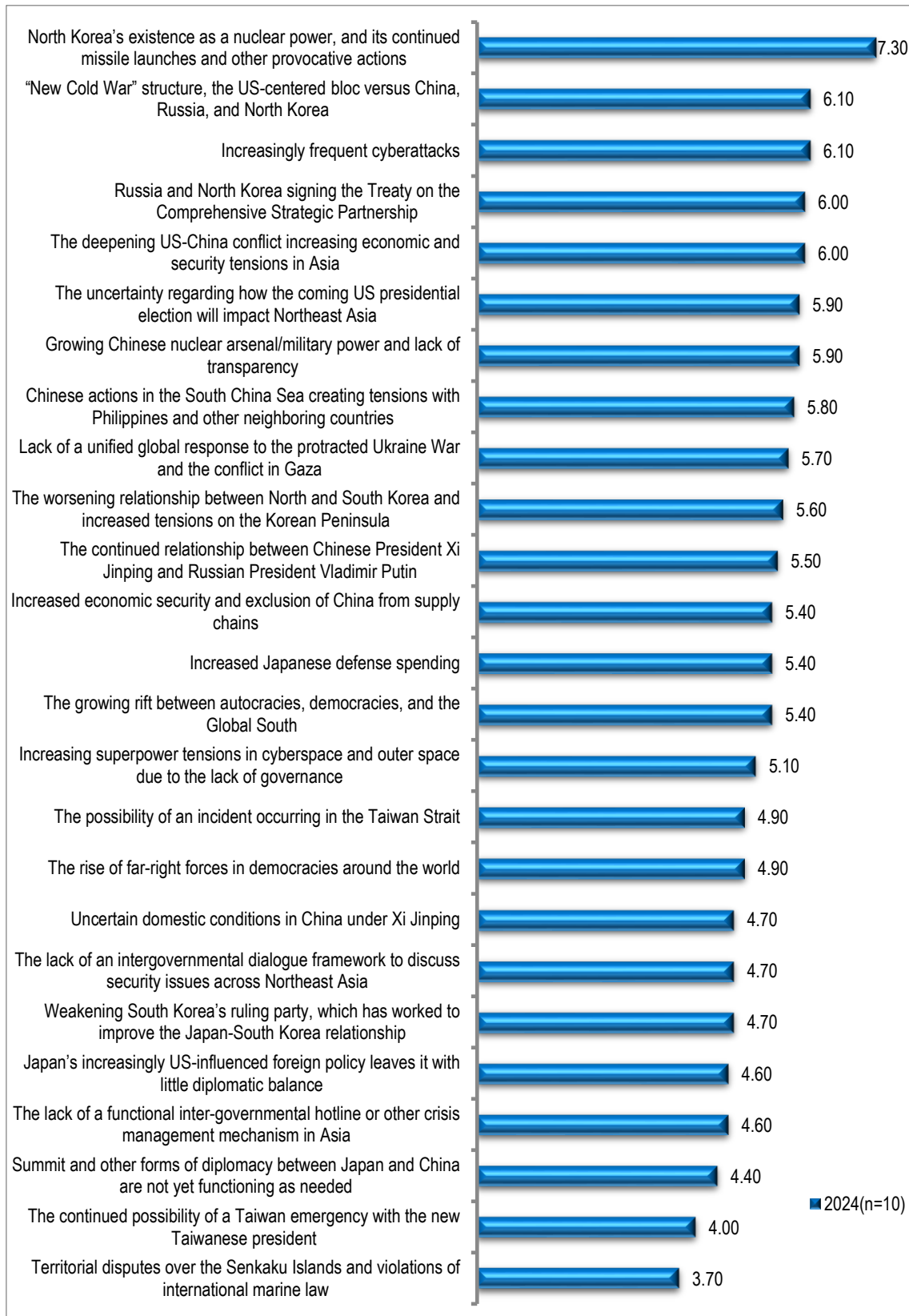
U.S. (n=51)



China (n=50)



South Korea (n=10)



4. Four Countries' Experts View on Other Security Related Issues

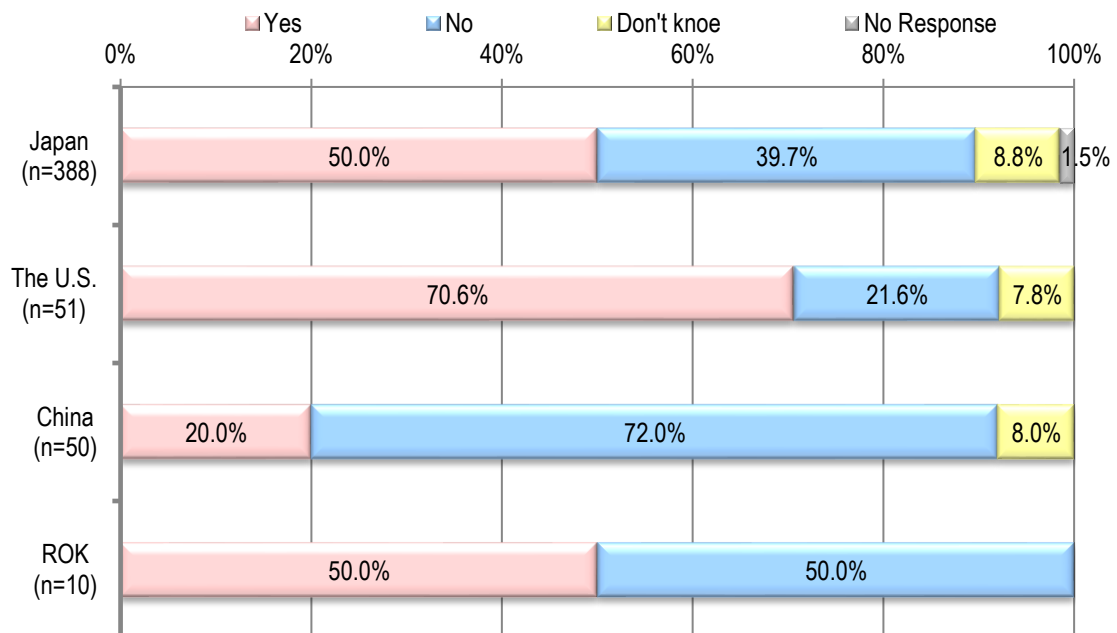
While conducting the main report, we also asked the experts from the US, China, and South Korea for their opinions on a number of separate issues. The Genron NPO conducted its survey of experts in July and selected questions from that survey to be used as a basis for these secondary inquiries. Here we conduct a rough analysis by comparing the results of the Japanese survey (published July 23) with the responses of the US, Chinese, and South Korean surveys.

Is a conflict or clash in Northeast Asia imminent?

Seventy percent of US experts and half of experts from Japan and South Korea feel that a conflict or clash in the region is imminently possible, whereas 70% of Chinese experts feel that the situation is not so dire.

Do you believe that the current tensions in Northeast Asia could lead to conflict or military clashes?

(Select one)



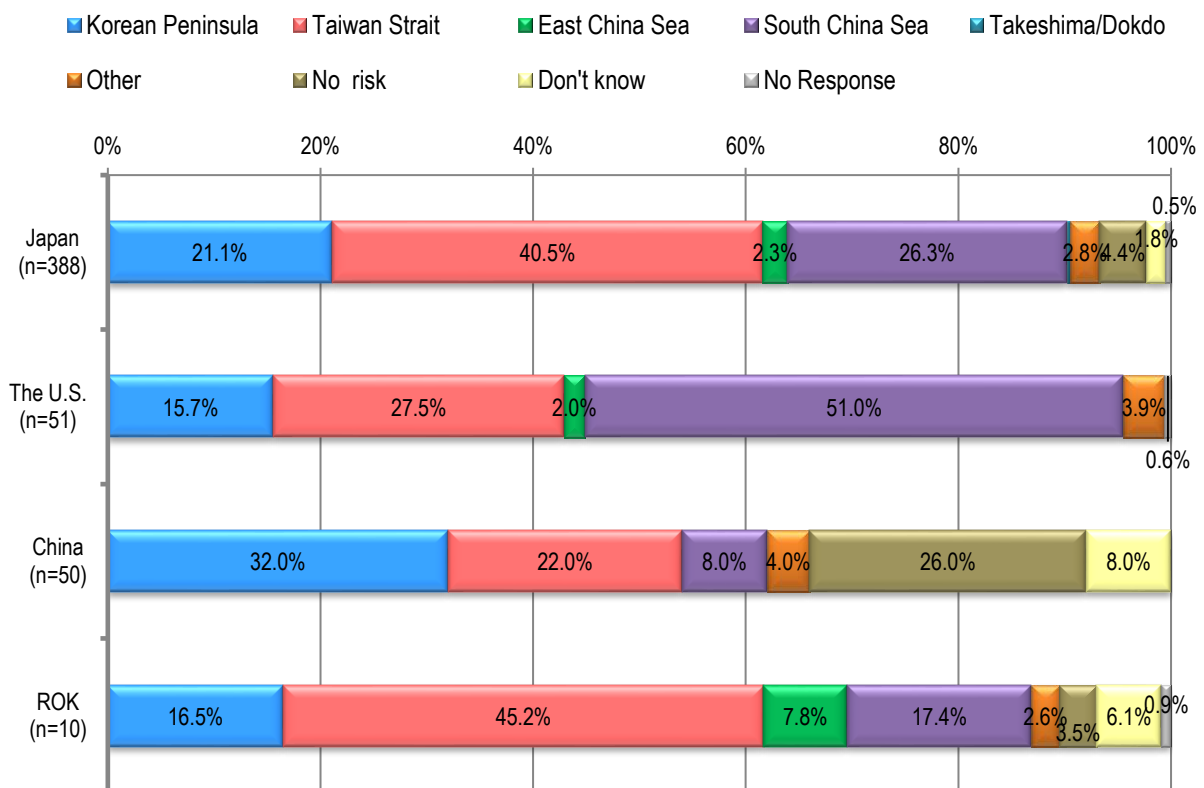
Which regions in Northeast Asia pose the most danger?

Fifty-one percent of US experts believe that the greatest risk for a military conflict can be found in the South China Sea, putting it far beyond the Taiwan Strait selected by 27.5%, and the Korean Peninsula, which was selected by 15.7%.

The most common answer among Japanese and South Korean experts was the Taiwan Strait, but even Japanese experts sense a greater danger in the South China Sea this year, with the number choosing it rising significantly over last year to 26.3%.

Meanwhile, less than 8% of Chinese experts see the South China Sea as being a potential flashpoint. The most common answer among them was the Korean Peninsula at 32%, while the Taiwan Strait stood at 22%. Twenty-six percent feel that no area is in particular danger of a conflict occurring.

Which region of Northeast Asia do you think is most in danger of a military conflict breaking out? (Select one)

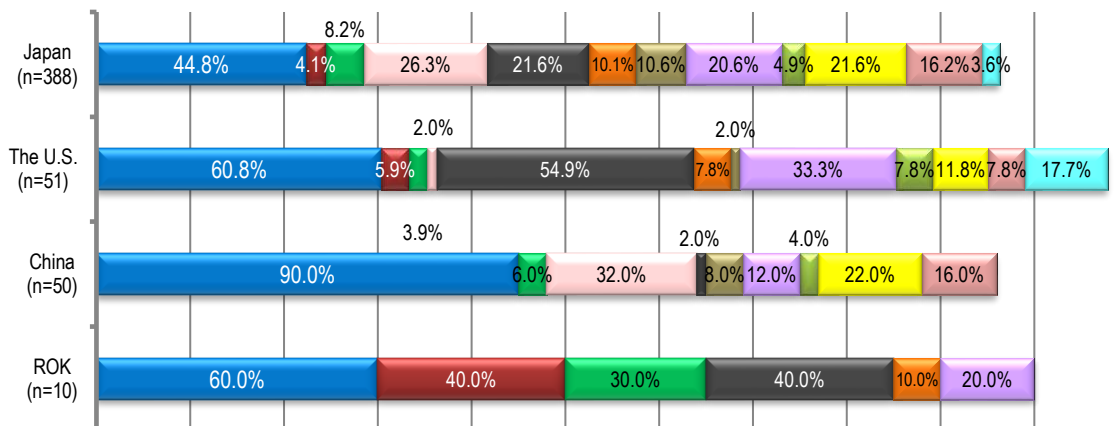


What issues stand in the way of peace in Northeast Asia?

The most common response among experts from all four countries was that an effort must be made to stabilize relationships between the major powers – i.e. between Japan and China and between the US and China – in order to prevent conflict and achieve peace in Northeast Asia. However, the next most common response was split by country. Japanese and Chinese experts feel that Japan and China must prioritize dialogue for the sake of regional stability, and US and South Korean experts believe that improved US-led deterrence is the answer.

What are the most important issues to address to avoid conflict and achieve sustained peace in Northeast Asia? (Select two)

- Stability of relationships between Japan and China, US and China, and other major powers
- Greater US nuclear deterrence to better respond to North Korea
- Resumed efforts to de-nuclearize North Korea and engage in dialogue
- Japanese prioritization of dialogue with China
- Improved US-led deterrence capability through the Japan-US and US-South Korea alliances
- Further increase in Japanese military power
- De-nuclearization and disarmament/arms control across Northeast Asia
- Conflict prevention in Taiwan Strait
- Crisis management in the East China Sea
- Create conflict-prevention rules through bilateral and multilateral agreements aimed at preventing incidents
- Avoid conflict and build a sustainable peace by establishing a new mechanism similar to the OSCE and by engaging in proactive track II sector dialogue towards that end
- Build an Asian version of NATO



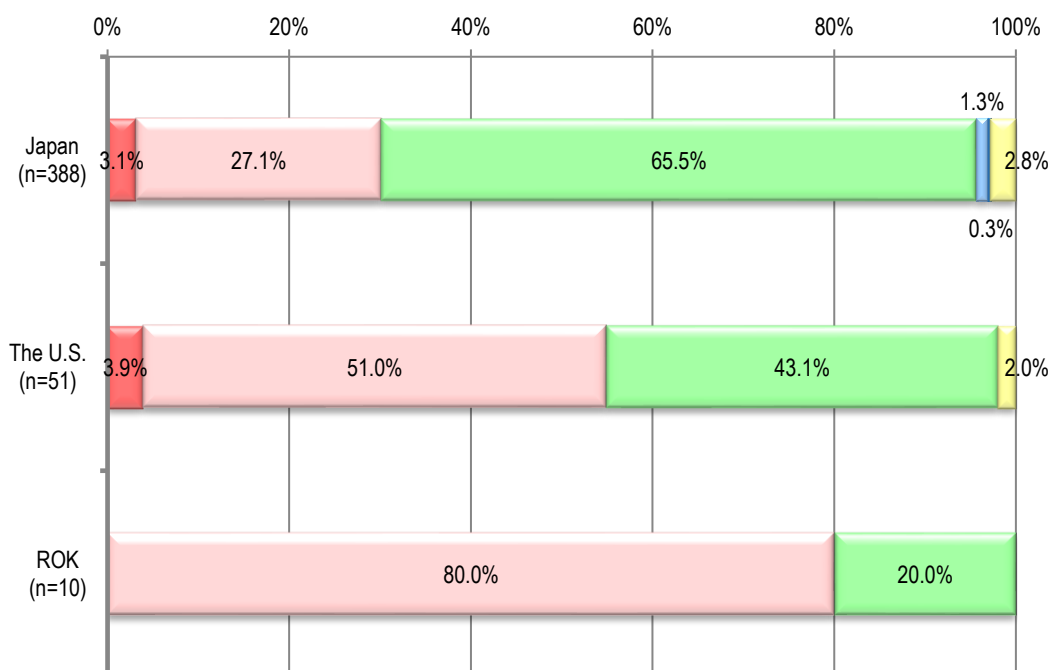
Has the election of the Lai administration increased the chances of a “Taiwan emergency?”

Almost 70% of Japanese experts feel that the possibility of a conflict over Taiwan occurring remains unchanged (i.e. has not increased) in the wake of the independence-minded Lai Ching-te administration taking the reins, but more than half of experts in both the US and South Korea feel that there is now a greater chance of conflict.

Lai Ching-te became Taiwan’s new president in May, and is seen by China as an advocate of Taiwanese independence. How has Lai’s inauguration affected the possibility of a Taiwan emergency?

(Select one)

- Greatly increased
- Increased somewhat
- No change
- Decreased somewhat
- Greatly decreased
- Don't know
- No Response



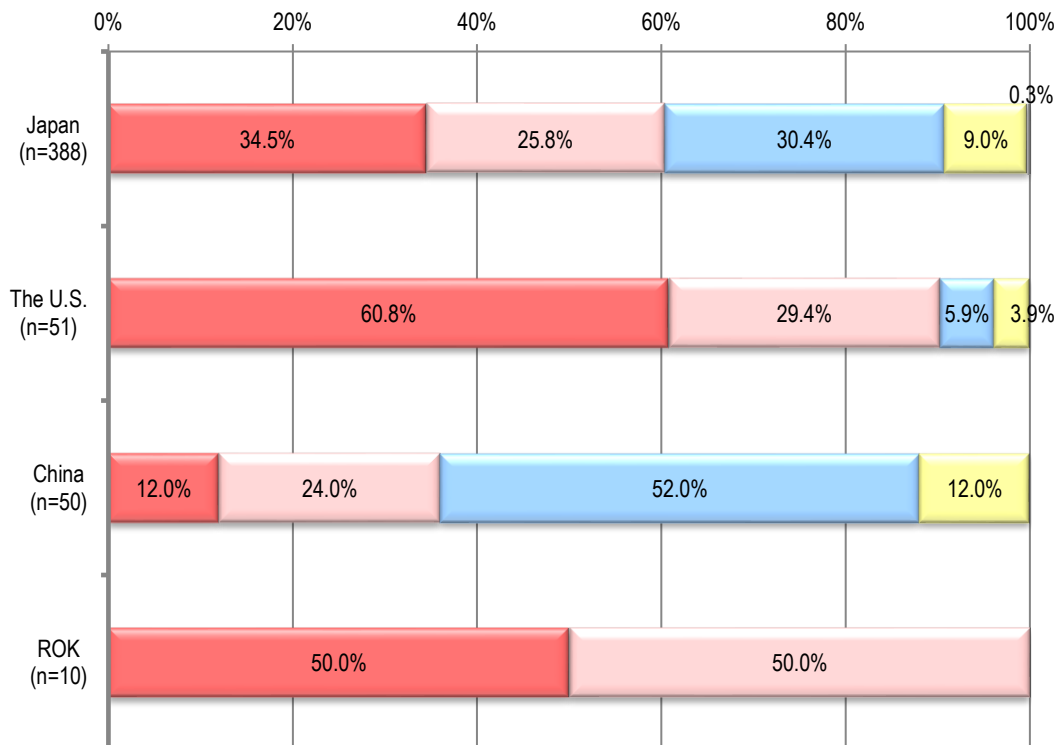
Is Northeast Asia in the midst of a “New Cold War”?

More than 90% of experts from the US and South Korea believe that Northeast Asia has entered a “New Cold War” or that it will enter such a state in the future. Around 60% of Japanese experts agree, but 30% believe that the situation will not develop in that way. More than half of Chinese experts believe that it will not happen in the future.

North Korean leader Kim Jong Un has used the term “New Cold War” to describe the emergence of two conflicting camps – with China, Russia, and North Korea on one side and Japan, the US, and South Korea on the other – and he is arguing that the gulf between the camps is deepening. Do you think that Northeast Asia is currently in the midst of such a “New Cold War?”

(Select one)

■ Yes
 ■ Not now but possibly in the future
 ■ Not now or in the future
 ■ Don't know
 ■ No Response



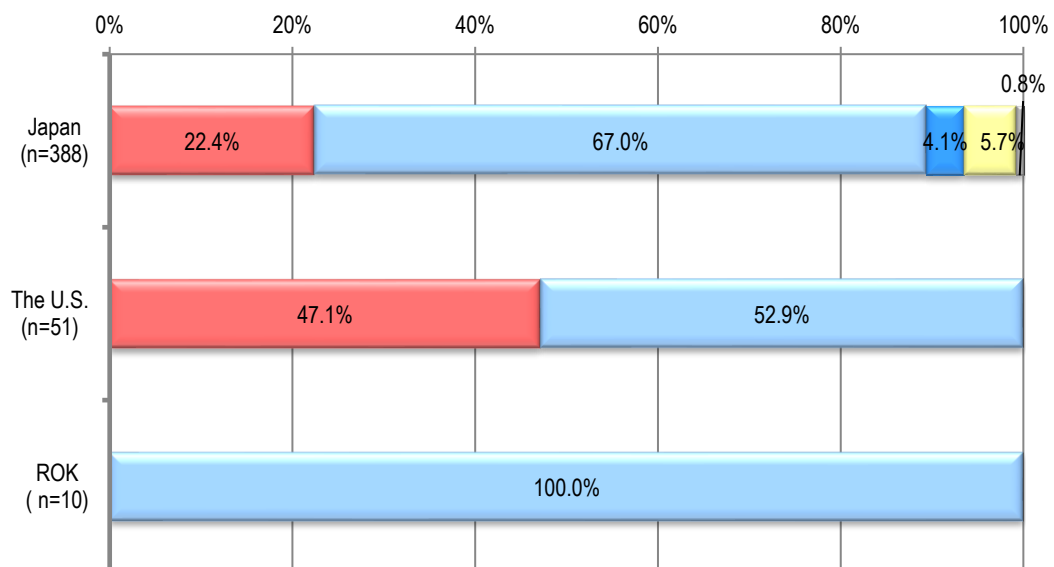
Is China's relationship with Russia and North Korea growing closer?

More than half of the experts in each of Japan (67%), the US (52.9%), and South Korea (100%) feel that while China will present a unified stance to the world regarding its relationships with Russia and North Korea, it will in practice begin distancing itself from the Russia-North Korea partnership. However, 47.1% of US experts and 22.4% of Japanese experts believe that China will build a deeper relationship with both countries.

What will China do next as the relationship between Russia and North Korea grows closer?

(Select one)

- It will deepen ties with Russia and North Korea.
- It will continue to maintain the semblance of a united front with Russia and North Korea, but will actually begin to distance itself.
- It will distance itself from Russia and North Korea in both word and action.
- Don't know
- No Response





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