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The Republic of Korea as a European Security Partner

1. Introduction

The Republic of Korea (ROK) has become a key European defence partner – and has achieved success in this regard to a level that was perhaps previously not thought possible. In the process the Asian technology and industrial powerhouses that are the ROK defence enterprises have changed the security environment in the EU in a way that will affect the development of Asian-European defence cooperation for the foreseeable future.

The notable contributions by the ROK towards building a more stable security environment in Europe were discussed in detail last year in an essay published by the Atlantic Council. "Over the past two decades, South Korea has transformed from a regional security partner into a global security provider," reads the analysis by David F. Helvey. "This evolution has significant implications for both the Indo-Pacific and the Euro-Atlantic, where challenges are increasingly interlinked. As Russia's aggression against Ukraine continues—bolstered by material support from China and North Korea—the dividing lines between these theatres have disappeared. What happens in Europe now reverberates across the Indo-Pacific," reads the essay[1]. That latter point might be of some interest to many of the national security "experts" in Washington, DC. There was no shortage of them - particularly from the end of 2021 up to 24 February 2022 invasion - telling all of us that they were absolutely certain that whatever Russia

[1] David F. Helvey, "South Korea and Europe are stepping up on security cooperation. Here's why.", Atlantic Council, 18 December 2025.

decided to do with Ukraine, whether they invaded their neighbour or not, it would have no impact on and no relevance to the security relationships with Asian nations. Fortunately for Europe in general and the Ukrainians in particular, a plethora of evidence to the contrary has emerged in the meantime.[2]

One of the most visible aspects of the ROK becoming a major security partner for European nations is the increasing number of contracts that have been signed between NATO member states and major South Korean defence industrial firms. What European defence ministries and their armed services have discovered is that having the ROK as a supplier has certain advantages. The heightened tensions created by the Russian invasion of Ukraine is one factor. Another is a general realisation on the part of European nations that they have been remiss for decades now in procuring adequate levels of weaponry and munitions for their own defence. Both have played no small role in the rapid increase in defence purchases from the ROK. Surging production is problematic for most of these European nations, and there are also logistical and supply chain issues that take – and are taking – years to address – so in this regard ROK weapon systems have literally "come to the rescue" of European defence at an opportune moment.

What these same nations discovered is that ROK suppliers can provide rapid, cost-effective arms deliveries that fill critical capability gaps in a timely manner. More significantly, these ROK defence firms do not look upon this sudden spike in demand as an opportunity to chalk up record sales that can generate record profits. Instead, these companies take a much longer-term view in that they intend to "piggy-back" on these sales as vehicles for expanding their presence in Europe. They intend to utilise them to deepen industrial integration, creating economies of scale and synergism with partners that can accelerate technological innovation in AI and robotics. This increase in cooperation ultimately means the ROK being the leading nation in the process of aligning security interests between NATO and their Indo-Pacific partners and allies. While there are more than just a few policy implications for Europe that will emerge as the process moves forward, the major questions concern: how the difference between the increased EU demand on defence products generated by the Russian aggression on Ukraine on one

[2] Angela Stent, "Russia's disruptive actions show that European and Asian security cannot be decoupled," Brookings Commentary, 15 July 2024.

hand, and the available EU and American supply of products on the other hand, will be managed, and what role the ROK may play in this process[3].

2. Industrial Challenges and Capacity

At the same time, ROK firms intend to present no small challenge to the traditional and established European and American defence contractors. As far back as 2023, the senior business development and advanced programmes officials at Korean Aerospace Industries (KAI) discussed openly that their company is seeing dramatic multi-year expansion in its sales in the future. That expansion is part of a 25-year corporate strategic plan they call "Global KAI 2050 — Beyond Aerospace." The same KAI officials state that they are not only planning for major engagements and partnerships in Europe but in other regions as well. They have the parallel goal of making their company the 7th - largest aerospace firm in the world.[4]

That objective is by no means unattainable or inconceivable. In the 2025 SkyArt ranking of the world's top ten aerospace firms, KAI already sits in the number 9 spot. The position of 7th place was held by Brazilian aerospace powerhouse Embraer. For purposes of comparison, France's Dassault, which is the major producer of fighter aircraft in Europe, was number 5 on the same list.

What might be even more significant is the 2024 assessment by PriceWaterhouse Coopers (PwC) that ranked the ROK as the number 3 top place in the world for investment in aerospace, behind the US at number 1 and Singapore at number 2. with Canada at number 4. and Japan rounding out the top 5, thus making Asia the home for three of the top five nations for aerospace industrial investment. The PwC analysis calls out the reasons for the ROK being number 3 over Canada and Japan – nations that have been home to established, major aerospace enterprises far longer than the ROK. PwC describes

[3] "Armed by America: how Europe's militaries depend on the US – a visual analysis", *The Guardian*, https://www.theguardian.com/world/ng-interactive/2025/jun/24/visual-guide-can-europe-really-defend-itself-alone, 24 June 2025; "Europe's dependence on US foreign military sales and what to do about it", *Bruegel*, https://www.bruegel.org/policy-brief/europes-dependence-us-foreign-military-sales-and-what-do-about-it, 13 October 2025;

[4] "Korean Aerospace Industries eyes new fighter designs, FA-50 sales in Pacific," *Breaking Defense*, 1 June 2023.

the nation as one that "excels in defence manufacturing, with rapid export growth and increasing self-reliance in A&D [aerospace and defence] production.[5]"

But while the successes of these ROK enterprises are a historic development in terms of the joint European and Asian defence cooperation, they have also been the source of some unpleasantness due to the implications for the European side of the equation. As an article earlier this year pointed out "Asian defence companies have the potential to outstrip European defence majors because they benefit from two trends: rising exports to the European Union and a sharp increase in domestic defence manufacturing across Asia as countries seek to replace imports (...). Based on the belief that an effective national security strategy demands a homegrown military industrial complex, Asian countries are increasingly focusing on domestic manufacturing to replace imports." Moreover, reads the same news story, "timely supplies and cheaper prices for products of equivalent quality are often tilting the balance in favour of the [South] Korean firms." This may mean that Europe's long-time defence firms have been hit with the proverbial double-whammy. They are losing market share in their own backyard to their Asian competitors and at the same time they are being displaced in Asia. Follow-on sales they might have been able to secure from previous exports in the Asian market will now instead end up in the hands of these "upstarts" from the ROK and others[6].

The laundry list of the EU and NATO nations that have become customers for ROK products illustrates the dimensions of the impact that Seoul's defence policy is having in Europe. Poland is in the pole position as the largest partner, purchasing nearly 1,000 K2 Black Panther tanks, K9 Thunder self-propelled howitzers, FA-50 light combat aircraft, and Chunmoo rocket launcher systems[7]. As a next-step consequence of that level of business Poland now acts as a regional hub for Korean defence technology transfers.

[5] "2024 Aerospace manufacturing attractiveness rankings", *PWC*, https://www.pwc.com/us/en/industries/industrial-products/library/aerospace-manufacturing-attractiveness-rankings.html (24 July 2026).

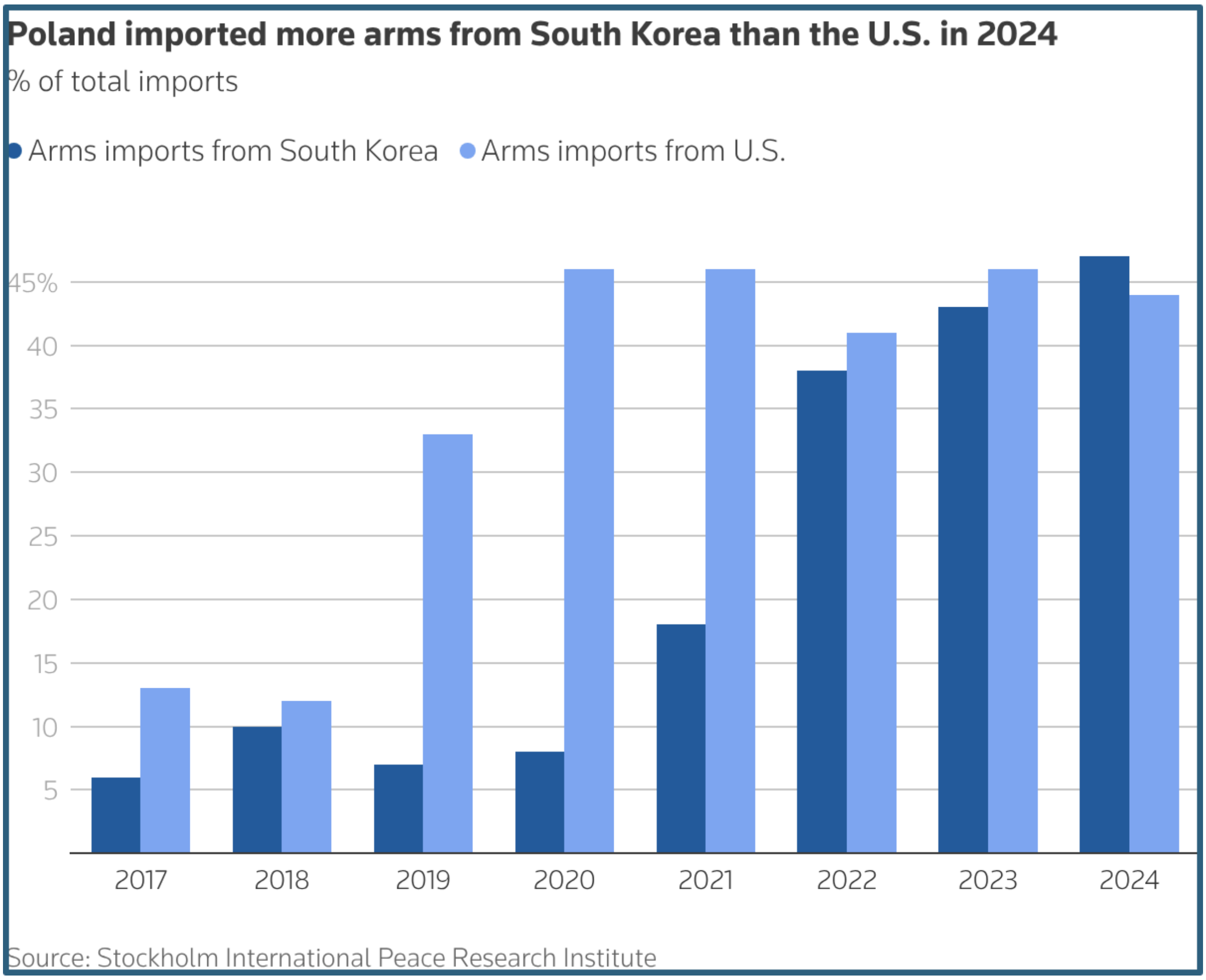
[6] "Asian defence firms may be surprise winners of rising geopolitical tensions," *Reuters*, 22 January 2026.

[7] To be precise, the 1000 K2 was a framework agreement. Currently signed executive agreements only contain the acquisition of 360 K2 (with 60 K2PL planned to be produced in Poland). Poland has also signed a framework agreement for 486 Himars in 2023, but haven't actually procured a single one (beyond the 20 bought in 2019 as part of another contract).

3. A New Procurement and Defence Policy Dynamic

This does not mean, however, that this is not causing some "shock to the system" type of reverberations on Europe's defence sector. "None of this was supposed to happen," was the constant refrain after the February 2022 Russian invasion of Ukraine and the ripple effects that it has had on what could be called the traditional and historical rhythm of European defence production. Unfortunately, it was far too late that EU nations realised they had based their defence planning on some false constructs. Before the invasion it was common to hear during the sessions with European defence enterprises that Russian President Vladimir Putin would never invade Ukraine because it would be suicide for the future of Russia, or the inevitable statements that Europeans will never allow for the conditions that would cause another war in the centre of Europe (as in appeasing dictators) to ever develop.

The Ukraine war shattering those illusions has also upended the manner in which the Europeans must now procure weaponry. Historically, the hallmark of European arms manufacturers has been creating complex, high-tech platforms, but also systems with excessively long development cycles and near-anaemic production tempos. This tradition is what had major European defence giants like Rheinmetall, KNDS, and BAE Systems developing their business models and strategic plans based on the assumption that European states would prioritise the purchase of domestic products. European nations would opt for a product built in their continent, was their reasoning, even if the delivery timelines were far longer than those of the US and the prices higher, so building faster and cheaper was usually not a first-order requirement.



The Russian invasion of Ukraine and more than four years of a full-scale, high-intensity war disrupting that model now means the winner of "the best salesman" goes to the company that can create, innovate, design and move into production in a shorter period than its competition. This abrupt transition from the traditional European procurement model into a "rapid rearmament" scenario, has created a new set of requirements for most of the European NATO members. Thus, there is a strong bias in favour of products in which the speed of delivery is now a higher priority than continuing to maintain political loyalty to European brand products.

Poland's procurement is the most visible example. The first batch of Hyundai-Rotem K2 Black Panther tanks arrived in Poland in December 2022, which was only three months after the agreement was finalised. By the end of 2024, Poland had received 84 of the 180 units ordered in the first executive agreement. This is a pace of delivery currently unattainable and almost unthinkable for most European production lines. To be fair to

European producers it's important to note, that the initial pace of Korean deliveries was possible not only due to the speed of production but also due to the fact that Korean partners had an existing stock of products ready for delivery. It's also noteworthy to point out that European manufacturers, while slower in deliveries in the past, begin to follow the pattern exercised by the ROK competition. For example, the KNDS main battle tank and armoured vehicle consortium currently plans to deliver 54 of the latest model Leopard 2 tanks to Norway: the 2A8NO models - a specialized domestic version of the newest Leopard 2A8 (the first of which was only completed in November 2025). While only 17 tanks will be manufactured in KNDS factories, the rest will be produced in a new Norwegian owned facility which will start production in late 2026. The deliveries of the 2A8NO types will take place over a period of three to five years. Similarly the first K2PL tanks, a modified Polish specialty variant of the K2 Black Panther, will be produced in Poland sometime in 2028 - so 6 years after the initial K2 contract.

However, it's beyond discussion that European companies need to seek ways to intensify and otherwise surge their manufacturing lines. But to accomplish this, unfortunately, requires massive capital investment. Another major German defence company, Rheinmetall, illustrates the dimensions of the current shortfalls in capacity and the levels of investment this dictates. The company was obliged to invest no less than €8 billion in 2023–2024 in new factories and acquisitions of other existing production facilities[8]. This included a decision in November 2022 to purchase Spain's Expal Systems munitions plant – a step to reduce the gap between demand and supply in artillery and land systems production capacity[9]. This may explain why other EE, EEC and NATO member states that have made major purchases from the ROK are Estonia, Norway and Finland – all of whom acquired the Hanwha K9 self-propelled howitzers, with Estonia also procuring the Chunmoo rocket launcher system. Romania is also considering a K9 purchase, the system already being one of the most popular self-propelled artillery systems worldwide.

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[8] "Financial figures for 2024: Boom at Rheinmetall – Result and Order backlog with new all-time records", *Reinmetall press release* https://www.rheinmetall.com/en/media/news-watch/news/2025/03/2025-03-12-rheinmetall-financial-figures-fiscal-year-2024, (25 July 2026).

[9] "Rheinmetall agrees 1.2 billion euro deal to acquire Spanish explosives maker Expal," *Reuters*, 14 November 2022.

4. Key Defence Policy Implications for Europe

The ROK has transitioned from being a source of niche products or new technological solutions that are worth taking the time to try out and see how good they are, to being an indispensable supplier to Central and Eastern Europe (CEE) nations[10]. It is not only their markedly shorter delivery cycles that outperform that of European competitors. Another attractive aspect for a nation like Poland, which is running so many procurements simultaneously, is that the ROK often offers more flexible payment terms and eases cash-flow problems.

A second development is that South Korean firms are moving beyond just simply exporting their products to Europe. They are taking the next logical step, as in they will begin establishing a local, permanent presence in Europe through joint ventures and technology transfers. This means establishing local, licenced product lines that will create durable, long-term partnerships. ROK companies will not be limited to being temporary, "targets of opportunity" solutions to Europe's current shortfalls in production.

ROK companies are also doing as much as possible to create interoperability between their weapons platforms and European systems by concentrating on NATO standardisation and joint technology development with European firms. While the cooperation was already taking place at the OEM level, today a new level of partnerships between European research institutions, NATO R&D planning, and ROK firms in developing new-age weapon systems is being developed. These include AI-enabled decision support command and control processes, uncrewed systems, and next-generation radars. Cooperation at this initial, conceptual stage will foster the greatest level of interoperability between ROK and NATO-nation platforms.

But, in every profile of this kind there is a "good news – bad news" aspect to the story.

In the "bad news" column there is the reality that European firms feel increasingly as though they are being threatened with the loss of market share in their own, homegrown

[10] For example - the earliest sales of the FA-50 and the T-50 trainer version were made to nations with limited funds - Philippines, Indonesia. Other nations (i.e. Poland) only bought the aircraft after its performance and capabilities were proven by other nations willing to take the risk of buying an untested product.

customer base. ROK-made weapon systems are increasingly seen as better value for money and present a challenge to the established European defence giants. These sentiments are the most pronounced in France and Germany. Poland again is the most visible example in this matter. It has concluded purchases of three different types of tactical combat aircraft – two models of US-made fighters and the other being the KAI FA-50. The three European-made fighters of the Dassault Rafale (France), the Saab JAS-39E/F Gripen (Sweden) and the Eurofighter that is produced by a four-nation consortium have all been consistently passed over. More than once the Poles have been called out for not making many major weapons procurements from European suppliers, which at times gives rise to the "suggestion" that the country is not living up to its obligations as an EU member state[11]. What's interesting, Ukraine, for its part, has thus far passed over the ROK options for major weapons systems and has only signed contracts for European combat aircraft – 150 of the JAS-39E/F and 100 of the Rafale – despite being neither a NATO nor an EU member state.

In 2024 the European Commission has already reacted to the rapid rise of non-European suppliers – seeing it as a threat to the long-term survival of their own domestic defence enterprises. In response, the European Defence Industrial Strategy (EDIS) was introduced in 2024. This document encourages member states to spend "more, better, together, and in a European way." For local, European manufacturers, this means they will receive more active and robust support from their political leadership, but the document also mandates higher efficiency requirements on these European corporations[12].

An analysis of this issue points out three central objectives of the EDIS initiative and its impact on Republic of Korea competitiveness in military procurement field:

Domestic procurement by European states is to reach 50 per cent by 2030: presently defence procurement in the EU is only 22 per cent sourced from European firms, while

[11] "Poland Signs First Loan Deal as Part of EU Defence Spending Push", *Reuters*, https://www.reuters.com/business/aerospace-defense/poland-signs-first-loan-deal-part-eu-defence-spending-push-2026-05-08, 8 May 2026; Stuart Dowell, "Why Poland's Patriots request revealed the cost of buying US weapons", *TVP World*, Analysis, https://tvpworld.com/92411621/europes-us-weapons-dependency-and-the-nato-guarantee-crisis, 1 April 2026;

[12] Roman Pryhodko, "Europe Under the Influence of South Korea's Defense Industry: What Makes Korean Weapons So Attractive?", *Militarnyi*, 18 April 2026.

non-European suppliers are the dominant feature in most major acquisitions[13]. This new initiative, in theory, should guarantee a level of demand and market share such that European firms will no longer be accusing not only the ROK but also other non-European defence suppliers of "poaching" in their territory. A key factor is whether these European companies can rapidly surge production. The poster child for this challenge might well be the Diehl IRIS-T SLM ground-launched air defence variant of this high-performance infrared (IR)-guided air-to-air missile. Very recently the company has planned to increase IRIS-T production beyond the current production rate of only 800 to 1,000 missiles per year.[14]

Adjunct to this overall campaign is the European Defence Industrial Programme (EDIP) that is armed with a budget of €1.5 billion for 2025–2027. This effort has been provided with this budget to fund joint procurement of specifically European-only defence systems. Another larger-scale step that is designed as an incentive for potential buyers to source from EU defence enterprises is the Security Action for Europe (SAFE) program. It offers up to €150 billion in credit to EU countries that decide to procure from European suppliers for purchases of weapons systems (with some priorities for ones that the Ukraine war has shown to be the most critical[15]). The most prevalent examples would be air defence, drones, and ammunition.

But, to paraphrase a long-time colleague and former Polish defence official, this is Europe – there are always loopholes no matter what. While SAFE regulations are already well known, the question remains, how the non-European companies will adapt to them, or, in more economic terms, how will they be able to optimize the existing cooperation frameworks and advantages to the SAFE reality. On one hand, the SAFE regulations state

[13] "Ukraine the world's biggest arms importer; United States' dominance of global arms exports grows as Russian exports continue to fall", *Stockholm International Peace Research Institute*, https://www.sipri.org/media/press-release/2025/ukraine-worlds-biggest-arms-importer-united-states-dominance-global-arms-exports-grows-russian, 10 March 2025;

[14] Max Bergmann, "Europe Needs an ASAP Program for Air Defense," Center for Strategic and International Studies (CSIS) occasional paper, 23 March 2026.

[15] "Security Action for Europe", *European Comission*, https://defence-industry-space.ec.europa.eu/document/download/6d6f889c-e58d-4caa-8f3b-8b93154fe206_en?filename=SAFE%20Regulation.pdf, 26 June 2026.

that the procured systems should have at least 65% of the estimated component and production costs originating from EU member states, EEA/EFTA countries, or Ukraine. On the other hand, SAFE article 16 states: "Contractors and subcontractors involved in the common procurement shall be established and have their executive management structures in the Union, EEA EFTA State or Ukraine. They shall not be subject to control by a third country which is not Ukraine nor an EEA EFTA State or by another third-country entity which is not established in the Union, in Ukraine or in an EEA-EFTA State." While these requirements still leave a lot of space for non-European contractors, the major question remains: how well they will adapt, to take advantage of it[16]. And ROK companies could learn from the history of American investment in Poland in this regard.

The S-70i Black Hawk that is made in Poland – despite being a US aircraft programme - is considered an EU-made defence product, because today it is being manufactured by Polskie Zakłady Lotnicze (PZL) Mielec. This facility is originally a Polish company, but it is also US-owned and a subsidiary of US-based Lockheed Martin. However, it remains an American-designed helicopter that was originally developed when the parent company, Sikorsky, was a division within the United Technologies Corporation (UTC). The legal designation for the S-70i as of today is that it is an export version of the original UH-60 Blackhawk that is "produced within the EU," but is not a purely European-designed and-owned product. Despite the PZL-Mielec labour unions' outrage the facility cannot take part in the SAFE program directly as it is owned by a foreign (non-EU) entity[17]. Only time will show who has learned from this lesson.

ROK firms would do well to research the history of the deliberations that led to this "split decision" of sorts, as the issue is more likely than not to be raised again and has already kicked off some aggressive lobbying within the relevant institutions in Brussels. Products offered by ROK companies still have the advantages of more competitive pricing and more aggressive delivery schedules, but these EU programmes could turn out to be very real

[16] From the ROK perspective it is vital to seek new cooperation pathways to maintain the strong presence in the European market, after all SAFE regulations are not shutting the door completely as evidenced by Article 17. stating that "The Union may conclude bilateral or multilateral agreements with like-minded countries [...] in order to open the eligibility conditions referred to in Article 16".

[17] "PZL Mielec wykluczany z SAFE. Związkowcy Solidarności biją na alarm", *Tysol*, https://tysol.pl/zwiazek/pzl-mielec-wykluczany-z-safe-zwiazkowcy-solidarnosci-bija-na-alarm,161758

"speed bumps" in the road when it comes to them expanding both their market share and industrial footprint in the EU.

In the end, there are two takeaways when looking to the future of ROK-European defence partnership. First, ROK firms are in the market to stay. The European and Asian security environments are already intertwined. The defence industrial firms in both regions are following that same trail of developments. Second, the ROK firms will have to become more engaged in lobbying for interests of their firms in the EU - highlighting how ROK firms are enhancing the business environment for EU defence firms and not damaging it. These two general conclusions mean that there will have to be political decisions made on both sides of the equation – and both parties will also have to be prepared to take certain actions to secure their positions. On the European side it is now a concrete reality that the ROK has an active and permanent role in the defence of the continent. It is not a temporary phenomenon that will disappear when the European defence firms surge their production to the levels that the current threat to the security environment dictates.

In addition, and in the words of a colleague and defence enterprise owner in Warsaw, "all of these issues are connected." The somewhat incomprehensible myth that there are no connections between the threat to Europe presented by war in Ukraine and the security environment in Asia has been shattered by the events and escalation of this conflict. It also goes some distance in the explanation of why the People's Republic of China (PRC) is so actively backing Russia's war and why the Chinese Communist Party (CCP) have taken the position that they cannot afford to let Putin lose this war.

On the South Korean side there will very likely be the need for more active lobbying across a broader scale of institutions, which has not always been the accepted practice. An example of what not to do might be from 2011 when the KAI T-50 trainer version of the aircraft was poised to become the winner in a competition for the Polish Air Force procurement of a new jet training platform for its up-and-coming fighter pilots. However, one of the actions taken in the wake of the final report of the April 2010 crash of the Polish government's Tupolev Tu-154M presidential aircraft was to cancel this tender and radically revise its requirements. Suddenly the KAI T-50 no longer had a sale that was almost ready to be signed off. In the wake of the cancellation, much of the KAI effort and presence in Poland was withdrawn and the field was left open. The re-run of the tender ended with the purchase three years later in 2014 by the Poles of the Alenia/Leonardo Aermacchi M-346 Master. In retrospect, it might have been a mistake for KAI to have pulled back after the Polish decision to re-run the tender with new requirements.

Speaking with a now-retired senior US defence industry executive who had a great deal to do with the T-50 ever being built in the first place he observed that KAI was an impressive, capable and dynamic company. But, he continued, "the Koreans do not always understand that sometimes when you are selling a major weapon system you go back to zero and have to start over." This is certainly the case with major export sales made around the world in recent years.

Depending on where you start counting, there are officials within Saab who will tell you that it took them 17 years on and off to sell the JAS-39 Gripen to Brazil's Air Force (FAB). In the time that this tender was re-started and then closed down only to be revived again later some of the same Saab representatives will tell you that they had to "win" that competition "four times or more." Each time the tender was called off and then launched again after a long pause the company had to begin again from square one when the procurement was back in the FAB budget. In the years that Saab were engaged in this effort the aircraft passed through a major modernisation phase with the JAS-39C/D that was the offer at the beginning morphed into the E/F Next-Generation Gripen that ultimately was procured by Brazil.

It is an extreme example in that not all nations buying fighter aircraft have the complications domestically that Brazil experienced in these years, not all of them have a major aerospace corporation that is a world leader like Embraer that the government feels a political mandate to continue to support, and not all potential customers need a new, modern-design weapon system but do not have an existential threat on their doorstep. The latter point was what gave Brazil the luxury of taking almost two decades to choose a new fighter. In the end, the lesson is that if the ROK defence community wish to see the remarkable success they have had in Europe thus far to continue they will have to carry on with a sustained effort - regardless of any setbacks - and never take their eye off the end objective.

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The Foundation brings together dozens of international experts in various fields (foreign policy, defence, energy, democratic resilience) and publishes analysis describing and explaining international events, identifying trends in the European and Transatlantic security environment and recommending solutions for government decision-makers and the private sector.

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