



## US-South Korea Defense Industrial Cooperation: Drivers, Developments, and Tasks Ahead

By Dr. Bo Ram Kwon

The 2024 US presidential election ended in a convincing win for former President Donald Trump, which reflects a strong desire for US renewal. However, the trajectory of US foreign policy is characterized by several underlying trends, regardless of who occupies the White House. These include an increasingly nationalistic approach to foreign policy, a strong military marked by the strengthening and modernization of its nuclear capabilities, and intense strategic competition with China. Although there are key differences between the Republican and Democratic parties, there is bipartisan emphasis on optimizing US defense capabilities and integrating with allies' capabilities and resources to enhance deterrence against adversaries. As a result, the US global alliance strategy has called for allies to do more burden- and role-sharing to minimize costs, reduce the risk of US entrapment, and contribute to winning the strategic competition with China. The desire to enhance economic security adds to these demands. US lawmakers see China as a revisionist, pacing threat that has taken advantage of the rules-based international order at its expense. The American people support this notion and anticipate policies to correct this trend and address their daily economic woes. Hence, US leaders champion fair trade and reciprocity and offer protectionist economic policies that prioritize the betterment of its domestic economy before the advancement of a free and open global economy. In sum, the United States places its interests first as it optimizes both military capabilities and economic resources to compete from a position of strength.

In this context, the United States has prioritized allied cooperation and also tapped into the appreciable national capacities and defense industrial bases of its allies and partners. Yet, the United States and South Korea have nuanced approaches to allied cooperation regarding the defense industry and related technology. For the United States, pursuing cooperation with South Korea as well as increasing cooperation among allies is important as a *means* to realize its global strategy and win in strategic competition with adversaries. Washington is far superior in defense,

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science, and technology, but its allies have a comparative advantage in certain areas. So, faced with multi-domain challenges to its national security, it desires efficiently resourced power through its network of allies and partners. From a South Korean perspective, enhancing defense industrial cooperation with the United States is not only a means to deepen the alliance relationship but also an *end* in itself. Namely, Seoul seeks ways to enhance its defense capabilities and competence in totality. These include opportunities to overcome problems in its own defense industrial base, as well as to more efficiently obtain advanced technologies and operation skills and access the US market.

This paper examines how defense-industrial cooperation has evolved between South Korea and the United States with a focus on the Yoon and Biden administrations. First, it aims to understand what defense industrial cooperation entails as its components range from US global strategy and integrated deterrence to the industrial policy of both countries. Second, it examines cooperation trends that can offer insights into defense industrial cooperation under the Yoon and the incoming Trump administration. The analysis centers on the US National Defense Industrial Base Strategy (NDIS) of 2024, especially the context in which it was announced, and its implications for Seoul. The paper draws on historical background, joint government statements, and recent efforts at policy implementation. As a preliminary study, the paper deserves deeper exploration in future work.

### **Drivers of US-South Korea Defense Industrial Cooperation**

Coupled with structural geopolitical factors, South Korea's advanced defense industry and strategic alignment have served as key drivers of defense industrial cooperation with the United States.

#### *South Korea's Defense Industry: From Client to Global Exporter*

South Korea's defense industry has grown significantly from its humble beginnings, mainly due to external security threats and the strong government support. After the Korean War, the government prioritized both national security and economic recovery, building a defense-industrial foundation alongside multi-year economic development plans. External shocks such as the Nixon Doctrine and the subsequent reductions in the US troop presence highlighted South Korea's need for greater self-reliance within the US-ROK alliance. This motivated Seoul to pursue "cooperative self-reliant defense" aimed at building a domestic defense sector that would strengthen its military while maintaining strong ties with Washington.<sup>1</sup>

South Korea developed its defense industrial capabilities with substantial security and technological assistance from the United States. Through military assistance and foreign military sales (FMS), along with regularized joint military training and exercises, the United States provided arms, technology, and expertise that bolstered South Korea's defense capabilities. Despite the United States being its largest weapons supplier, South Korea was dedicated to producing much of its defense equipment locally, aiming to reduce dependence on its ally and achieve greater autonomy within the alliance. As a result, its defense industry evolved from simple assembly of parts to indigenous production. Government initiatives supported this growth by protecting local defense firms, mostly large conglomerates or chaebols, through guaranteed sales, loans, and tax incentives. The defense sector also benefited from the expansion of heavy industries and a push to integrate civil and military sectors, which bolstered research and development (R&D) in technology.<sup>2</sup>

By the 1980s, South Korea met its domestic defense needs and began seeking international buyers for its excess production. Since the mid-2000s, the government has implemented export-oriented strategies, transforming the industry from domestically focused to globally competitive. The defense industry is still subsidized by the government, but high levels of defense R&D, advanced defense technology, and a vibrant domestic market have catalyzed the expansion of arms exports.<sup>3</sup> Today, companies like Hanwha Aerospace and Hyundai Rotem export advanced military technologies, marking South Korea as a significant player in the global defense industry. In 2023, arms exports to Poland included the K2 Black Panther battle tank, K9 Thunder self-propelled howitzer, K-239 Chunmoo rocket artillery system, and FA-50 light combat aircraft.<sup>4</sup>

### *South Korea's Strategic Alignment and Proactive Defense*

In previous years, South Korea was perceived to be hedging between the United States and China as it invoked strategic ambiguity and attempted to balance between the two countries. Since President Yoon Suk-yeol came into office in 2022, however, South Korea began to demonstrate more strategic clarity and facilitate US coalition-building and power projection in the Indo-Pacific region. The Yoon government envisioned South Korea as a "global pivotal state" that plays a larger role in regional and global affairs. Presidents Biden and Yoon elevated the US-ROK alliance to a global comprehensive strategic alliance, and South Korea published its own Indo-Pacific Strategy in late 2022, adopting a more US-aligned regional framework that the previous administration had studiously avoided.<sup>5</sup>

The main differences between progressive and conservative governments of South Korea include their perception of the North Korean nuclear threat, desired solutions and policy processes, and the anticipated role of China in resolving the North Korean conundrum. Nevertheless, South Korea's defense policy has been consistently grounded in proactive deterrence against North Korean aggression through allied defense. South Korea recognizes that conventional weapons are powerful against a nuclear arsenal with the advantage of higher credibility and technological advances that enable a prompt response.<sup>6</sup> The Ministry of National Defense (MND) continues to develop and refine the "Three Axis system," including the Korean Air and Missile Defense, the Kill Chain, and the Korean Massive Punishment and Retaliation plan.<sup>7</sup> The revision of the bilateral US-ROK missile guidelines in 2021 led to rapid advancements in precision-strike capabilities.<sup>8</sup> In this light, building a self-reliant defense industrial base has received bipartisan support in South Korea. As evidenced by its growing arms exports worldwide, South Korea is in a good position to enhance interoperability with like-minded states. It is a reliable partner with a range of high technology, development, and manufacturing capabilities. Recognizing that its own industrial growth would not have been possible without external assistance, Seoul is willing to transfer technologies as offsets.

### **US National Defense Industrial Strategy**

Intensifying strategic competition between the United States and China, supply chain challenges during the COVID-19 pandemic, and lessons from the protracted war in Ukraine have mobilized the United States to overhaul its defense industrial base structure and bolster cooperation with allies and partners. Overall, the United States appears intent on keeping its hegemonic status as the most formidable military power but realizes that commanding primacy in all theaters and sectors is near impossible. Thus, in addition to enhancing its absolute power, it seeks to harness coalitional power through a lattice-like network of security and industrial partnerships. In fact, the strategic intent to strengthen its control and influence over existing alliances and new partnerships is the driving force behind moving from the traditional hub-and-spokes model to a production web-like model. Building overlapping linkages in production and development would ultimately project a strong signal of resolve.

In particular, with the outbreak of the war in Ukraine, the DOD realized that its "industrial ecosystem needs to be ready to provide the capabilities at speed, at scale and at cost that the department needs."<sup>9</sup> The unexpected setbacks faced by the Russian armed forces during combat showcased the primacy of logistics over strategy.<sup>10</sup> The United States quickly learned that providing everything



from simple conventional ammunition to high-technology missile defense weapons systems on the battlefield was extremely difficult. Current capacities could not satisfy immediate needs. Recognizing the importance of rapidly producing and seamlessly providing a range of interoperable, multi-domain capabilities propelled the United States to review past practices of defense industrial base cooperation and reform. As it rebuilt a defense industrial base for Ukraine, it resolved to strengthen diverse modes of cooperation with allies and partners through the co-development of new technologies, co-production of existing weapons, and shared sustainment.<sup>11</sup>

Against this background, the United States published its first National Defense Industrial Strategy (NDIS) in 2024. The NDIS is ambitious as it presents a strategic vision of modernizing the defense industry ecosystem that aligns with the 2022 US National Defense Strategy (NDS). At the core of the NDIS is the realization that national military power depends on economic and industrial capacity. It aims to revive the defense ecosystem so that it can produce arms rapidly and sufficiently by strengthening cooperation across all US agencies—alongside the private industry—and with allies and partners. The ultimate goal is to build an integrated deterrence capability by creating a “robust, resilient, and dynamic” industrial ecosystem with a sustainable competitive advantage over adversaries.<sup>12</sup>

The NDIS articulates four priorities, although this paper focuses on the first: resilient supply chains.<sup>13</sup> The NDIS envisions a defense ecosystem that can produce the weapons systems, components, services, and technologies needed now and in the future by strengthening the resilience of existing supply chains. Eight actions to achieve resilient supply chains are identified, with illustrative outcomes as indicators of progress. In particular, the strategy calls for “engaging with allies and partners to expand global defense production and increase supply chain resilience.” The global network of US alliances and partnerships is the cornerstone of integrated deterrence.<sup>14</sup> The war in Ukraine uncovered numerous sub-tier vulnerabilities in the US and global defense industrial base and found that defense material production could not be scaled as needed. Hence, the DOD resolved to develop a networked cooperation framework to de-risk supply chains from adversaries and advance its ability to engage in co-sustainment and maintenance, repair, and overhaul (MRO) with like-minded states.

In this vein, the NDIS will expand defense industrial production capacity to solve supply shortage problems related to ammunition and missiles. The US government plans to play a substantive role by increasing federal and private investment, providing incentives, revising laws and regulations, enriching stockpiles of strategic items, strengthening linkages with private companies, and expanding global

production with all government agencies and friendly partners. Specifically, it will invest in excess capacity, provide multiple suppliers, and offer sourcing for licenses and contracts. Moreover, the government will strengthen inventory management efficiency, enhance supply chain risk identification and visibility through data analysis, diversify the supply base, strengthen industrial security, expand production facilities, simplify production methods, increase investment in process automation, modernize existing military depots, and actively improve the FMS system by reflecting the needs of friendly countries (Table 1).

**Table 1. Actions to Achieve a Resilient Supply Chain<sup>15</sup>**

	Actions	Contents	Illustrative Outcomes
(1)	Incentivize industries to improve resilience by investing in extra capacity.	Establish public-private partnerships and shape legislation to plan and deliver increased DIB capacity.	Increase spare production capacity.
(2)	Manage inventory and stockpile planning to decrease near-term risk.	Increase stockpiles of strategic and critical systems and increase the effectiveness of ad hoc working groups that are tasked with this job.	Increase the replenishment rate of critical systems in response to the war in Ukraine.
(3)	Continue and expand support for domestic production.	Foster innovation through accelerator programs.	Pass legislation to solve domestic challenges.
(4)	Diversify supplier base and invest in new production methods.	Expand relationships with firms and industries not included in the DIB to promote investment in advanced manufacturing automation.	Increase the number of new suppliers working with the DOD.
(5)	Leverage data analytics to improve sub-tier visibility by identifying and minimizing strategic supply chain risks and to manage disruptions proactively.	Increase supply chain visibility in the sub-tier to mitigate risk.	Identify more bottlenecks.

(6)	Engage allies and partners to expand global defense production and increase supply chain resilience.	Strengthen global defense production relationships and build production strengths through various international collaboration mechanisms such as NATO, Ukraine Defense Contact Group's National Armaments Directors, the National Technology and Industrial Base, and AUKUS.	Increase the number of purchases made through bilateral and multilateral agreements (i.e., security of supply arrangements) to boost defense production, innovation, and overall capability.
(7)	Improve the FMS process.	Enable FMS to drive commercial sustainability, working with the US Department of Commerce and Department of State.	Increase FMS.
(8)	Enhance industrial cybersecurity.	Improve capacity to deal with evolving cyber threats.	Reduce cybersecurity incidents targeting DIB partners.

Similar to all national strategies, experts continue to debate the practicality of the NDIS and the balance between means and ends. Nonetheless, the first interim implementation report of the NDIS released last June claimed that substantial funding had been secured and laid out the following details. Funding for the Defense Production Act (DPA) increased significantly from an average of USD 84 million per year (2013-2019) to USD 774.5 million per year (2020-2023). Funding was also provided by the 2021-2023 Ukraine supplemental appropriations, the Inflation Reduction Act of 2022, and the FY2024 national security supplemental appropriations. The FY2024 supplemental and base defense appropriations combined will allocate USD 74.6 billion toward defense industrial base (DIB) investments, including the modernization of the submarine industrial base and replenishment of arms sent to Ukraine, Israel, and Taiwan. To bolster resilient supply chains, the implementation report claimed that DOD has prioritized growing domestic sources of critical materials needed to reduce lead times for defense systems, investment in munitions production, and diversification of the supplier base.<sup>16</sup> Direct investments were made in domestic production facilities, and a Defense Industrial Base Cybersecurity Strategy was released.<sup>17</sup>

At the Shangri-La Dialogue in June, US Secretary of Defense Lloyd Austin talked about a deliberate and purposeful “new convergence in the Indo-Pacific” that would create a more resilient and capable network of partnerships.<sup>18</sup> The NDIS is bolstered by the Partnership for Indo-Pacific Industrial Resilience (PIPIR), which is a multilateral forum aimed at strengthening defense industrial resilience to promote continued defense security, economic security, and prosperity in the region. It aims to accelerate DIB cooperation by reducing production barriers, creating new sustainment hubs, and dealing with supply chain restraints. The Statement of Principles for Indo-Pacific Defense Industrial Base Collaboration emphasized the importance of shared defense industrial resilience, set out the requirements and standards, and identified relevant stakeholders. This was endorsed by 13 nations, including the United States, with Taiwan playing an advisory role.<sup>19</sup>

### **Implications for South Korea**

The NDIS ultimately aims to deepen integration across domains, within US forces, and with allies and partners. Hence, it is expected to have a significant impact on future defense and acquisition policy, as well as institutional arrangements in Seoul. South Korea has a comparative advantage in expanding production capacity for ammunition, shells, missiles, and ships. It not only has leading manufacturing capacity but also maintains sufficient levels of strategic stockpiles that guarantee readiness. These features make South Korea an attractive partner for the United States and will incentivize more integration between industries and defense companies. However, South Korea also desires to gain from such cooperation, such as increasing access to the US market, reforming some of its own defense industry base practices, and lifting existing caps on methods of defense cooperation.

First, South Korea’s dependence on US FMS is high—the total volume of weapons acquired through foreign purchases from 2017 to 2021 was USD 13 billion, and more than half was acquired through FMS programs valued at USD 6.7 billion.<sup>20</sup> If the FMS system is improved under the NDIS to better reflect the opinion of partners, South Korea can anticipate innovation in rapidly supplying arms, efficient follow-up of military support, and co-development and co-production through trade-offs. This could boost the entry of South Korean defense companies into the US defense market. The acquisition of US robotics and IT firms by South Korean defense companies is underway and could expand.<sup>21</sup> Building on these transactions, South Korean companies, research institutes, and universities with advanced technologies such as artificial intelligence, semiconductors, and batteries could expand joint ventures in the United States.

Second, there are internal demands to diversify the acquisition system and innovate contracting methods. South Korea's Defense Acquisition Act was partially revised in 2023 to adopt a "rapid" acquisition system in 2024. The anticipated change is that a weapons system that applies vetted technologies from the private sector or core technologies from the government can now be adopted by the military within five years. This allows for timely technology adoption and project implementation as it can sidestep various verification stages once acquisition is determined by the ROK Joint Chiefs of Staff.<sup>22</sup> However, the nimbleness of the rapid system is still limited compared to the United States and needs to be improved. One could envision the establishment of a Korean version of the US Defense Innovation Unit and the adoption of a rapid acquisition process for both defense software and hardware. In regards to contracting, the majority of South Korean arms contracts are signed via the lowest-cost bidding method. Choosing the bidder this way is straightforward and draws few complaints, but it could be harmful to the industry as a whole. The lowest-cost bidder is not always the one investing the most in resilience or contributing to building a robust industrial foundation for the future.<sup>23</sup> An alternative contracting method could be formulated alongside changes emanating from the NDIS.

Meanwhile, the self-diagnosing strategies of the NDIS are applicable to South Korea and could help identify and remedy its weaknesses. The identification of vulnerabilities in the supply chain can be directly applied. A preliminary joint study conducted by the Korea Institute of Materials Science and Technology (KIMS) and the Korea Institute for Industrial Economics and Trade (KIET) finds that South Korea is highly dependent on imports for core defense materials.<sup>24</sup> As of 2022, South Korea imports 78.9 percent of its ten major defense materials. Among these, 80.4 percent are metal, and 47.5 percent are non-metal. Both types of material are critical to the production of parts as well as whole products. Domestically, it procures steel, copper, nickel, cobalt, and aluminum alloys. Meanwhile, it procures core materials from a set number of countries, including the United States, Japan, Germany, and China. For instance, South Korea is highly dependent on the United States for heat-resistant alloys and titanium alloys, with no domestic alternatives. It is highly dependent on Japan for ceramics and moderately dependent on compound material, both of which South Korea can procure from within. South Korea is moderately reliant on China for compound material, ceramics, and copper and has alternative sources (See further details in Table 2). Although this is only one example of measuring vulnerability, it demonstrates that without significant external support, South Korea's defense supply chain would suffer. The lesson is that Seoul should conduct a more rigorous review of its core material procurement status and use a range of platforms, such as the Minerals Security Partnership (MSP), to enact initiatives that strengthen its supply chain with like-minded states.<sup>25</sup>

**Table 2. South Korea's Imports of Core Defense Materials (2022)<sup>26</sup>**

	Material	Proportion of Procurement (%)					
		Domestic	Foreign Imports				
			United States	Japan	Germany	China	Other
<b>Metal</b>	Steel	84.3	14.5	-	-	-	1.3
	Heat-resistant alloys	-	90.0	5.0	-	-	5.0
	Aluminum alloys	48.0	34.3	0	9.1	0.9	7.7
	Titanium alloys	-	95.0	2.5	-	-	2.5
	Copper	63.3	-	-	-	10.0	26.7
	Nickel/Cobalt	50.0	7.5	-	15.0	2.5	25.0
	Others	-	100.0	-	-	-	-
	Total	53.1	30.1	0.3	5.3	1.7	9.5
<b>Non-metal</b>	Compound material	8.3	36.7	15.8	3.3	26.7	9.2
	Ceramics	20.0	-	60.0	6.7	13.3	-
	Other	25.0	75.0	-	-	-	-
	Total	16.2	40.0	21.2	3.1	15.4	4.2

In the end, South Korea could draw up its own Defense Industrial Strategy to effectively manage defense resources like the European Union, which published its own European Defense Industrial Strategy (EDIS).<sup>27</sup> However aspirational strategies may be, it is important to incorporate government-led defense businesses and civilian-led defense *industries* under a comprehensive strategy that emphasizes a whole-of-society approach to defense *industry* development. The recent surge in South Korean arms exports is positive, but a sustainable strategy that balances arms exports with meeting domestic demand, strategically prioritizing the production and procurement of certain weapons systems over others, is needed to build on the current level of success.

### *Challenges to Cooperation*

Despite the urgent need to restructure the defense ecosystem so that cooperation between the United States and its allies is enhanced, there are some pre-existing, structural constraints that may hinder the process. For one, there are external factors. Since the mid-1980s, Western industrialized states have been keen to take advantage of globalization while guarding against proliferation risks.<sup>28</sup> Recognizing that integrating power mattered significantly more than being able to produce lower-tier parts and equipment, the United States has long been a proponent of globalization in the defense industry. It has utilized its dominant market power and technological prowess to either directly pursue its foreign policy goals or indirectly shape buyers' policy preferences, notably through the sales of F-35 fighters that are in high demand.<sup>29</sup>

With the end of the Cold War and after the first Gulf War, the United States began to reduce its defense spending. It sought to manage the defense industry with smaller defense budgets and encouraged mergers and acquisitions of defense firms to reduce overcapacity and administrative maintenance overhead. As a result, the US defense market was restructured to include a handful of major defense firms or prime contracting firms, including Lockheed Martin, Boeing, General Dynamics, Northrop Grumman, and Raytheon. The focus on these primes made it more difficult for foreign firms to penetrate the market.<sup>30</sup>

Meanwhile, the United States has concentrated investment in R&D and the procurement of next-generation weapons systems to sustain its military advantage and influence, as well as deter challenges from strategic competitors. Its emphasis on military technological development and defense production interdependence signifies the traditional approach to excel on its own. The United States has always been highly guarded about transferring technologies



with potential dual-use applications. Although research shows joint development partners who participate from the outset of the project are less likely to face hurdles in high technology transfers, such as the International Traffic in Arms Regulations (ITAR), co-development standards remain high and accompanied by many restraints.<sup>31</sup> These structural barriers make it difficult to cooperate with allies on advanced technology. South Korea expects to move up the production ladder and develop more sophisticated weaponry with advanced technology, preferably obtained from the United States.

Thus far, the United States has enacted various policies and laws to harness resilience in the supply chain.<sup>32</sup> Both the Trump and Biden administrations actively utilized executive orders to reinforce the Buy American Act (BAA) of 1933.<sup>33</sup> Although President Biden repealed several BAA executive orders issued by his predecessor, he maintained Executive Order 13881 and the new Final Rule.<sup>34</sup> Whether or not the United States has a distinct industrial policy is debatable, but the Biden administration has emphasized building and manufacturing in the United States through legislation much more than the Trump administration's emphasis on increasing tariffs and exports.<sup>35</sup>

Meanwhile, South Korea's defense ecosystem has been criticized for lacking opportunities for private technology companies, government-funded research institutions, private research institutes, and universities to collaborate and create synergetic effects. The number of South Korea's designated defense firms peaked at 101 in 2016 and 2017, then fell to 92 in 2018 and 83 in 2023.<sup>36</sup> More can often be better. To streamline defense technology R&D and the defense industry under the leadership of the ROK Ministry of National Defense (MND), a reformative plan to place the Agency for Defense Development (ADD) under the auspices of the MND is underway.<sup>37</sup> The defense technology protection agency and eight defense R&D-related units within the Defense Acquisition Program Administration (DAPA) will also be transferred to MND.<sup>38</sup> An office for the second vice minister of the MND is expected to be established to oversee these agencies, which will determine the procurement priorities of each service and notify DAPA and ADD.

### **Recent Developments**

The US DOD and ROK MND held the 25th Korea-U.S. Integrated Defense Dialogue (KIDD) in September 2024.<sup>39</sup> The discussion focused on the three pillars of the Defense Vision of the US-ROK Alliance released in November 2023: enhancing extended deterrence efforts against North Korea; modernizing alliance capabilities based on science and technology cooperation; and

strengthening solidarity and regional security cooperation with like-minded partners. The two sides pledged “to continue expanding cooperative measures to enhance the defense industrial base and interoperability.”<sup>40</sup> They agreed that the DOD’s Regional Sustainment Framework (RSF), which aims to ensure that “the Joint Force is supported by sustainment strategies that are responsive, resilient, and ready to deliver in a contested logistics environment,” would strengthen the posture and capabilities of the US-ROK alliance.<sup>41</sup>

The RSF aims to utilize allies and their defense industries proximate to a US deployment area to create a virtuous cycle, where reduced maintenance needs through nearby support lead to shorter maintenance periods, higher utilization rates and combat readiness, and the formation of a collaborative US-allied sustainment system.<sup>42</sup> MRO initiatives under the RSF will include increases in maintenance facilities investment. South Korea’s leading shipbuilders have already signed a Master Ship Repair Agreement (MSRA) with the US Navy’s Naval Supply Systems Command.<sup>43</sup> At this year’s KIDD, South Korea’s participation in the MRO pilot project for the Air Force’s aviation maintenance was recognized, and the allies pledged to continue discussions on expanding cooperation with the Army’s aviation and naval vessels. They also noted the recent contract between the US Navy and South Korean shipyards for the MRO of US vessels. The need to provide reciprocal market access to deepen defense cooperation, enhance supply chain resiliency, and advance progress on a Reciprocal Defense Procurement Agreement (RDP-A) was also recognized.<sup>44</sup>

On November 16, 2023, US Under Secretary of Defense for Acquisition and Sustainment William LaPlante and ROK Minister of DAPA Eom Dong-hwan signed the Security of Supply Arrangement (SOSA). This was previously discussed at the 48th Defense Technological Industrial Cooperation Committee (DTICC), which was held in July 2023 for the first time since 2018 and during which the allies decided to sign the agreement as soon as the administrative process was finalized. As a result, South Korea became the 16th SOSA partner of the United States.<sup>45</sup> SOSA allows for the prompt supply of industrial support between allies. DOD and foreign partners can request priority delivery for critical defense components from each other’s respective industrial bases, which promotes government-to-government industrial cooperation and collaboration. This means that when South Korea makes a priority request to the United States, it can receive its defense supply order first. As a result, South Korean domestic weapons systems can be deployed on time, increasing their rate of operation. SOSA is also expected to facilitate the entrance of South Korean defense firms into the US market.<sup>46</sup>

The DTICC also created space to discuss the MRO of ships and the management of materials and parts in the supply chain. In August 2024, Hanwha Ocean entered a contract to overhaul a 40,000-ton US Navy dry cargo and ammunition ship at its Geoje shipyard. It is the first South Korean shipyard to secure a ship MRO contract with the US Navy, and Hanwha Ocean will conduct maintenance and inspections on all logistics support ships from the US Navy that dock there. This entry into the US Navy's MRO market is estimated to be worth about USD 20 trillion annually.<sup>47</sup> Last June, Hanwha Systems and Hanwha Ocean acquired the Philly Shipyard from Norwegian energy firm Aker ASA.<sup>48</sup> And, in April, HD Hyundai Heavy Industries signed a separate MOU with Philly Shipyard to cooperate on various construction and MRO projects.<sup>49</sup> From 2005 to 2017, HD Hyundai partnered with Philly Shipyard for design and procurement support during the construction of 22 commercial product tankers. The shipbuilders also plan to extend their collaboration to vessels and government ships for the US Navy and Coast Guard.<sup>50</sup>

The delegations at the 48th DTICC also discussed the RDP-A, which allows allies to access each other's defense markets and build sustainable cooperative mechanisms. The signing of the RDP-A was emphasized at the US-South Korea summit in April 2023 and reiterated at the 24th and 25th KIDD in 2024. As early as October 2022, the DAPA and MND established a whole-of-government task force for realizing the RDP-A. In February 2024, the DOD began its internal process to enter into the agreement, which was supported by legislators such as Representative Michelle Steel (R-CA). In April 2023, the US National Security Council had held its first defense industry export strategy meeting and made clear its commitment to realize the RDP-A to suit South Korean national interests. This point was raised because some advisors to the RDP-A task force questioned whether the deal would remove all such barriers as expected.<sup>51</sup> In reality, South Korean defense firms had limited experience in making business-to-government deals with Washington, so they could not confirm whether signing an RDP-A would be beneficial for those that lagged behind US firms in defense technology.<sup>52</sup> Nevertheless, an audit by the US Government Accountability Office (GAO) is anticipated to slow down negotiations on the RDP-A.<sup>53</sup>

What was agreed to at the 56th Security Consultative Meeting (SCM) held in October creates further momentum for US-ROK defense industrial cooperation.<sup>54</sup> Secretary Austin and ROK Minister of National Defense Kim Yong-hyun agreed to modernize alliance capabilities and strengthen regional security cooperation. On the former, they agreed to expand science and technology cooperation through the establishment of the Defense Science and

Technology Executive Committee (DSTEC) at the vice-minister level. They committed to deepening industrial base collaboration and supply chain resilience through the PIPIR and MRO. For the latter, they launched the Regional Cooperation Framework for US-ROK Alliance Contributions to Security in the Indo-Pacific.<sup>55</sup> They emphasized working together on issues of mutual interest, such as securing supply chains, enhancing technology security, and sharing best practices on export controls and foreign direct investment.

## Conclusion

South Korea's dependence on the United States as its security guarantor as well as its main provider of advanced defense technology will continue to be vital to the development of its defense industry. However, it is less clear what defense industrial cooperation between the allies will look like as the United States continues to adjust its global and alliance strategy with an inward-looking leadership vision while optimizing its national resources to compete and win against China. Experts that recommend a strategy of overmatch, namely combining capabilities in sufficient scale to ensure lopsided victories over the adversary in combat, or a regional division of labor between the Indo-Pacific and European theaters underline that US hegemony is under strain, US relative power has declined, and that prioritization of resources is critical.<sup>56</sup> Although US grand strategy of primacy or unrivaled hegemony was largely maintained throughout the first Trump administration, it remains to be seen how the next four years will unfold.<sup>57</sup>

US bilateral security assistance to Ukraine and the rallying of global support for the Ukraine War in the name of value-based foreign policy underlines US reluctance toward direct military intervention. The motivation behind rebuilding Ukraine's defense industrial base and manufacturing capacity is to enhance its ability to sustain itself in the long haul, should support from the West wane. Increasing logistical self-sufficiency will make Ukraine less dependent on foreign support while its accession to the European Union and NATO remains far from guaranteed. This implies that more will be asked of allies and partners and that the integration of industries provides a strong basis. The risk of entrapment and abandonment in the traditional alliance framework may be too simplistic to characterize what dilemmas lie ahead in a multi-layered, web-like network of states, industries, and firms.

Against this background, South Korea's defense industry serves multiple purposes. It certainly helps to create a more responsive global defense ecosystem as a US ally. However, its primary aim is to support its own armed

forces in deterring North Korea, grow its self-reliant defense industry, and expand its arms export portfolio into advanced technologies. Despite positive developments, the desire to work more closely with the United States on advanced defense technology and to create inroads into the US defense market may not be readily fulfilled. As competition in the global defense market intensifies, mini- and multilateral platforms such as NATO, AUKUS, and the QUAD are being mobilized for defense industry cooperation. With the publication of the EDIS, the EU aims to “reindustrialize” its defense industry and impose quotas for arms procurement from within. Going forward, non-members such as South Korea may face various entry barriers unless they fail to act proactively. Already, there is an existing hierarchy among US allies where regulations are discriminately applied. Priority begins with the most trusted partners that belong to the US National Technology and Industrial Base (NTIB), including Canada, the United Kingdom, and Australia. Next are the allies that have RDP arrangements with the United States, such as NATO members, Israel, and Japan. Lastly, there are allies who are largely treated as non-allies.<sup>58</sup> In reality, South Korea has long belonged to this group, despite the US-ROK alliance being hailed as the “linchpin of peace” for the region and the world.

Some important tasks lay ahead. South Korea does not have a strategy as comprehensive as the NDIS, and instead relies on a five-year Defense Industry Development Master Plan. While the NDIS is national security-oriented and emphasizes economic deterrence, this is lacking in South Korea’s plans which remains alliance focused. As Seoul grows into a mature arms exporter and continues to diversify its security relationships with non-US partners, it needs to think more strategically. For instance, it will need to strengthen economic security agreements with its buyers. The United States does not offer offsets that may affect its defense technology advantage. South Korea may need to learn from this, creating a separate agency that reviews offsets. More importantly, it will need to invest substantially in the R&D of high-technology weapons systems and parts. A fair proportion of the core technologies that make up South Korea’s weapons systems are of foreign origin.<sup>59</sup>

That said, much hinges on the incoming Trump administration. Either the upward trajectory of South Korea’s arms exports will continue due to enhanced defense industrial cooperation with the United States, or this may falter due to US pressures to increase South Korea’s burden-sharing, which may affect substantive investment in defense R&D. In the meantime, acquiring advanced technology will not get any easier if a “high fence, small yard” policy continues. The potential for reductions in US security assistance to Ukraine may negatively

impact global demand for arms, and a relaxation of US export controls toward the Middle East might spark market competition between US and South Korean defense firms. Nevertheless, since precision has proliferated in modern warfare with the use of cheaply made commercial drones, the United States and South Korea should explore creative options like co-developing collaborative combat aircraft (CCA) under the Replicator initiative.<sup>60</sup>

In the meantime, a prudent conclusion of the RDP-A is needed, and cooperative efforts to ensure a stable global supply of critical materials should be strengthened with diverse partners. Since the RDP-A pertains to opening up the US defense market as well as South Korea's, there are concerns that Seoul may confront more aggressive negotiations with the United States next year. There may be some changes in MRO and shipbuilding cooperation, especially given the fact that President-elect Trump directly mentioned the importance of cooperation on shipbuilding between the allies.<sup>61</sup> The emphasis on tariffs and "buy American" could weaken MRO cooperation in favor of shipbuilding in US shipyards, which will require massive investment from South Korea defense firms. Maintaining current levels of defense industrial cooperation is important for the US-ROK alliance and their respective strategic needs. In all, it is important to keep close communication between US and South Korean government officials, industries, and researchers to find ways to harmonize the security logic of the alliance with the economic incentives of the defense industry and market.

## Endnotes

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