

Panther trumps Leopard

The Arms Deal between Poland and South Korea and its Implications

This article was reviewed by Lisa Bielmaier and Elie Castanie



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In the face of the Russian invasion of Ukraine, it hardly comes as a surprise that a country in Europe decides to overhaul its military. Especially if this country shares a common border with Russia and one of Russia's closest allies, which leaves it under a constant threat of possible future acts of aggression. And yet Poland's decision comes as a surprise - because it is not buying defence equipment from its close allies Germany or France. Rather, Poland is renewing its military with products from South Korea. Instead of German Leopard-2 tanks, Warsaw is now buying almost 1000 K2 «Black Panther» tanks from Hyundai Rotem, as well as 48 FA-50 jets and 672 K9 Thunder howitzers, which are already in service in Australia, Norway, Estonia and Finland ([Dominguez, 2022](#)). Both countries have good reasons for the deal, and by signing the agreement, they are sending a clear mes-

sage to their neighbours and to the global political stage. This article examines the deal by looking at political factors enabling it as well as at the agreement's future implications for Europe and South Korea. It argues that it is South Korea's all-in-one approach to arms deals that renders Korean products especially attractive for Eastern NATO countries.

The Black Panthers from South Korea

For South Korea, this deal serves as a clear indication of the country's political

and economic ambitions. The Asian Tiger state has increasingly shifted its focus towards the development of its defence industry which acting president Yoon Suk-yeol described as a "new future growth engine" and "pivot of the high-tech industry" ([Al Jazeera, 2022](#)). He further proclaimed it his goal to make his country one of the world's four largest arms exporters ([Lennon & Bae, 2022](#)). According to the Stockholm International Peace Research Institute (SIPRI), South Korea already ranked 10th in the world in 2021, after occupying

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only rank 31 in 2000; when only looking at sales between 2017 and 2021, the country even occupies the 8th rank ([Stockholm International Peace Research Institute, 2022](#)). If the ambitious goal is achieved, South Korea would surpass countries such as China, Israel, but also Germany. And while

there may be an array of disagreements between the country's two largest parties, there seems to be consensus on the importance of the defence sector. This is underlined by the large investments made under the previous liberal President Moon Jae-in.

With South Korea's growing ambitions, the pool of potential customers is also growing. While purchasing countries have so far mainly been in the Asia-Pacific region, countries from other regions of the

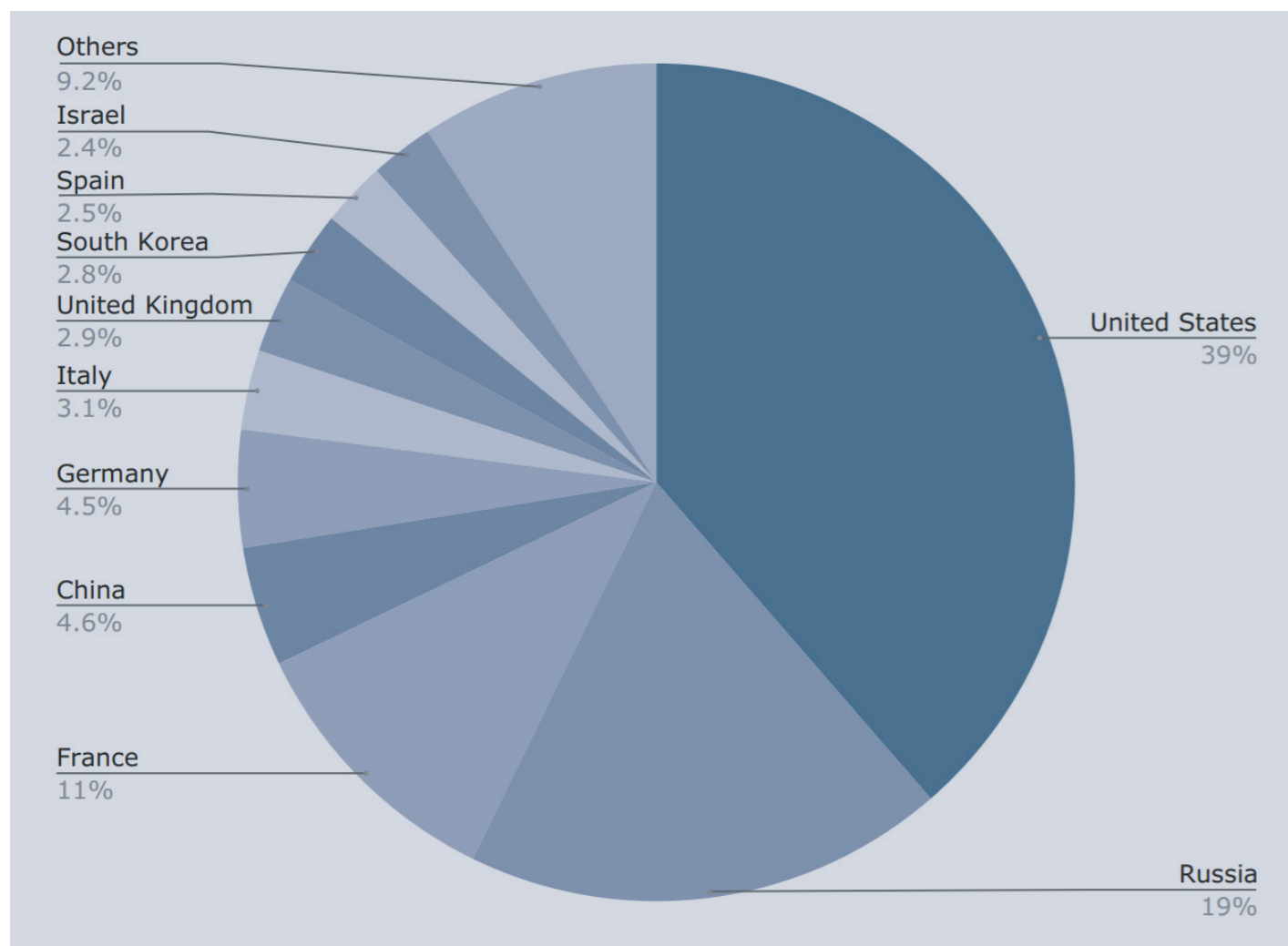


Figure 1: Global share of exports of major arms by the 10 largest exporters, 2017–21

Source: Kuimova, A., Wezeman, T., & Wezeman, P. D. (2022, March 14). Trends in International Arms Transfers, 2021. SIPRI. Retrieved January 4, 2023, from <https://www.sipri.org/publications/2022/sipri-fact-sheets/trends-international-arms-transfers-2021>

world are increasingly interested in what Seoul has to offer. In 2022 alone, extensive contracts have been signed with Egypt and Australia, and in the past there have been a number of agreements with countries in the Middle East, Latin America, Africa and Northern Europe (Ryall, 2022). In addition, Turkey is already producing its own tanks based on the Korean K2 Black Panther, and Poland uses Korean K9 howitzers, for which Warsaw has now placed a large order, as the basis for its domestically developed AHS Krab artillery pieces (Army Recognition, 2022; Hyundai Rotem, 2008).

From a technological perspective, the reasons for the popularity of South Korean armaments are manifold. On the one hand, their technical specifications are comparable to those of products from the USA or Germany. Due to the South Korean military's close ties to the USA, all equipment is compatible with NATO structures and has a similar technological standard. The K2 tanks are technologically akin to the German Leopard-2 and the American Abrams M1A2. They have a 120 mm cannon and are equipped with 1500 hp engines. According to the manufacturer, however, they are seven tonnes lighter and, with a unit price of around 8.5 million US dollars,

cheaper than their counterparts from Germany and the USA. They also have a computerised gun with a relatively high rate of fire of 15 rounds per minute.

The K9 howitzer also has similar capabilities to its German counterpart, the Panzerhaubitze 2000, but is cheaper with a unit price of 3.8 million euros. Moreover, South Korea has already gained combat experience with the K9: When North Korea shelled Yeonpyeong Island in 2010, the South Korean military responded with K9 howitzers and, according to its own information, destroyed several targets in North Korea.

The FA-50 fighter is a light aircraft for ground combat. Technically, the FA-50 is based on the American F16 Fighting Falcons. Further developments are planned to make the aircraft capable of fighting larger ships (Aeroflight, 2016).

From Defence Agreements to Strategic Partnerships

Besides technological aspects, South Korea's "whole-of-government approach" (Dominguez, 2022) is another factor that appeals to potential customers. When purchasing Korean products, Seoul grants loans to the buyer countries and exhibits flexibility towards repayment. At the same time, such agreements pave the way for further trade and investment relations as well as technology transfers.

With this strategy, Seoul intensifies its relations with other states and creates networks of interdependence between itself and other countries. Furthermore, through the export of sophisticated defence products, South Korea elevates its position in the international community to that of a technologically advanced country, which makes cooperation and trade more attractive. These factors contribute to South Korea's security in the region, where the



Figure 2: K2 Black Panther Tank

Source: 대한민국 국군 Republic of Korea Armed Forces

country is surrounded by global superpowers China and Japan as well as its nuclear-armed neighbour to the North. In this setting, a strong defence industry helps South Korea to avoid dependency on its neighbours or even being crushed in a regional conflict. Consequently, the intention behind Seoul's pursuit to become a global player in defence and other complex technologies can be seen as a pursuit to strengthen its position in the international system and to ensure long term survival. In this respect, arms trade is beneficial to both the buyer states and South Korea itself.

So far, this could mainly have been observed in the Asia-Pacific region, where Seoul is particularly seeking proximity to the ASEAN states. South Korea has important investment and trade relations with these countries; only China does more trade with the Southeast Asian bloc of states ([ASEAN-Korea Centre, n.d.](#); [Ministry of Trade, Industry and Energy, 2017](#)). Besides trade relations, Seoul maintains important security links to the region. These are exemplified in the joint development of a fighter jet between South Korea and Indonesia ([Kwon, 2021](#); [Parameswaran et al., 2022](#)). Additionally, South Korea was the main supplier of arms to the Philippines, Indonesia and Thailand between 2017 and 2021, and was the third most important supplier to Vietnam in the same period ([Kuimova et al., 2022](#)). Furthermore, the recent development of a dedicated Indo-Pacific strategy indicates the elevated role of the region in Seoul's foreign policy ([The Korea Times, 2022](#)). Overall, South Korea has already established itself as an important regional power in Southeast Asia.

The agreement with Poland demonstrates that South Korea could now transfer this strategy that has already been successful in the

Asia-Pacific region to the global level. The country no longer wants to be perceived as a mere regional power, but wants to take on a pioneering role in defence and security worldwide. The Poland deal can thus also be seen as a door opener for further arms deals between South Korea and Europe. The agreement underpins Seoul's aspiration to join the ranks of the world's most powerful states in economy and security. This is the path South Korea has chosen to distinguish itself from its two powerful neighbours and to ensure its own security and prosperity in the long term.

A Common Pursuit for Security

South Korea's defence industry however is not the only indicator for the country's changing ambitions. Another factor are its security policies and its role in the global security architecture. In this regard, the country's relationship with NATO and the European Union are of special relevance.

Currently, South Korea is not a NATO-member state and considering its relationship with China, it is unlikely that Seoul will pursue a NATO-membership in the future. However, the North-East Asian nation is considered a NATO Partner State in the Asia-Pacific region, along with Japan, Australia and New Zealand, and has recently opened a diplomatic mission to NATO, as the last of these four states ([NATO, 2022b](#)). Furthermore, the country already participates in NATO's cyber defence unit ([Terry & Orta, 2022](#)). All this hints at South Korea increasingly drawing close to NATO under its current conservative leadership.

At the same time, close ties to Seoul would also benefit NATO, after the alliance has declared China a "systemic chal-

lenge" ([NATO, 2022a](#)). Through a strong partnership, NATO could render a major global arms producer one of its allies and thus prevent the potential rise of a powerful rival in future. Additionally, Seoul could serve as an intermediary between NATO and states in South-East Asia, helping the alliance to increase its influence in the ASEAN region. South Korea could hence become an important strategic asset in NATO's China-containment strategy.

Moreover, the North-East Asian tiger state seeks close security ties with the European Union. Seoul and Brussels have already been cooperating on a range of security issues, among which cybersecurity stands out. South Korea has been chosen as a partner for a pilot project regarding cybersecurity, which led to joint consultations on several related issues such as mutual trust building or combating cybercrime ([Delegation of the European Union to the Republic of Korea, 2020](#)). There have also been joint cybersecurity exercises ([Casarini & Putz, 2021](#)). South Korea additionally participates in European preventive diplomacy missions such as the anti-piracy operation NAVFOR (Operation Atalanta) off the horn of Africa, and discussions between Seoul and Brussels have started on ways to cooperate in regard to space technology ([Casarini & Putz, 2021](#)). This comes after South Korea has joined the development of Europe's satellite system Galileo in 2006 ([The Hankyoreh, 2006](#)).

Against this backdrop, South Korea has now closed a comprehensive defence agreement with a state that is pivotal in the EU's security policy. This elevates South Korea's position in Europe's security policy as it creates dependencies on the Asian tiger state. Inevitably, ties between Seoul

and Brussels will grow even closer in future. That way, South Korea may take the step from a regional power in the Asia-Pacific region to become an important power on the world stage.

Why Poland picks the Panther

In regard to Europe, the implications of the agreement are comprehensive and complex. They affect domestic and foreign policies of both individual states and the European Union as a whole.

Firstly, the integration of weapons poses a challenge for the Polish military, as additional systems will be included in the already rather fragmented landscape of weapon systems. Soon Poland will provide the largest tank army in the EU. However, it will then consist of systems from the Soviet Union, Germany, South Korea and the USA. Thus, ensuring interoperability will be a challenge not only for the Polish military leadership, but also in conjunction with NATO partners. However, this is where the Korean systems have an advantage, as they are already operating in East Asia in conjunction with the USA and have been tested in joint use.

Secondly, the agreement will bring the European defence industry competition from Asia. Europe does have numerous competitive defence manufacturers such as RheinMetall, Airbus or MBDA. However, they are subject to strict European regulations and generally do not produce on the scale required for national and alliance defence. Consequently, procurement processes also take a comparatively long time. In this regard, South Korean armaments make for an attractive alternative to established products. Not only are they readily available, defence agreements may also include technology transfers that allow

buyer countries to produce the purchased products domestically. Hence Seoul's all-in-one approach may help these countries to reduce dependencies on other nations. This pattern can be observed with the Poland-agreement. While South Korea will initially supply 180 tanks until 2025, over 800 units will be manufactured in Poland as an adapted variant "K2PL" from 2026 onwards ([The Defense Post, 2022](#)).

Thirdly, the agreement strengthens the bridges between Europe and South Korea. Through the deal, Europe deepens its ties with a partner that shares its liberal democratic values. This broadens strategic options and provides the opportunity to further intensify economic cooperation in future. How close these ties already are cannot be overlooked in Poland. For example, the Korean conglomerate LG operates Europe's largest factory for electric vehicle batteries near Wrocław, and the operating company of Korea's Incheon International Airport has been selected as a strategic partner for Poland's new major airport project, which is to become one of the most important airports in Europe ([aeroTELEGRAPH, 2021](#); [Kane, 2022](#)). The European Union and the East Asian state are already closely linked. The arms agreement now indicates that the already existing political and economic relations will be further deepened in the future, and that specifically the Polish-Korean relationship will be at the centre of future developments.

However, the search for new partners is not the only motivation for the Polish government to buy defence equipment in the Far East. The agreement also signals the incumbent PiS government's critical attitude towards Germany. After stating that Poland was "not arguing with the EU, but with Ger-

many" ([Kozmiński, 2022](#)), the government is now following up its words with deeds to underline its position. Against this backdrop in particular, the PiS party can domestically sell it as a political success that it has turned to Seoul rather than to Berlin for the renewal of the country's military. Additionally, Seoul's aforementioned all-in-one approach provides the country here with a competitive advantage as it is not only buying military equipment but also know-how from its Asian partner. Therefore, Poland is less reliant on political climates in other countries such as Germany because it can produce its arms domestically.

The big loser of the agreement could ultimately be Germany, and in particular German defence manufacturers. Admittedly, German defence products still enjoy an extraordinarily good reputation worldwide. However, rapid availability in large quantities becomes an important factor against the backdrop of a new real threat of war. In times of need, it remains doubtful whether Germany will be able to meet this requirement. In general, German armament policy is traditionally lengthy, complicated and often non-transparent. For example, it is not readily apparent why Leopard-2s are supplied to Saudi Arabia. In the wake of the Russian attack on Ukraine, Eastern Europeans in particular have therefore perceived German policy as erratic, hesitant and not very reliable. Among other things, a so-called ring swap in which Poland was to receive Leopard 2 tanks from Germany in return for giving Ukraine its own T72 tanks failed. The lack of trust in Germany is driving the search for alternative partners. Moreover, Berlin has long dismissed concerns about a Russian attack in

the East as exaggerated, which is likely to have further diminished confidence in Berlin. Korean systems, on the other hand, offer an attractive alternative. They are inexpensive, relatively quickly available, and their technical specifications can compete with Western products ([Gould, 2022](#)). In fact, Norway, another European country, mulls purchasing the Korean K2 rather than the German competitor Leopard-2. Germany may thus lose another potential customer for its defence products out of similar motives.

The Poland Deal as final Door Opener?

All in all, the defence agreement between Poland and South Korea holds benefits for both nations. Poland gets to renew its military amidst looming threats from the East and can use the deal as an outlet to express its distance towards Germany. The European Union draws an important

partner closer to itself which allows for more strategic leverage in the Asia-Pacific region, whose strategic importance is increasing rapidly. And finally, the export of tremendous amounts of defence equipment contributes to South Korea's aim of becoming one of the world's top arms exporters and additionally secures the small nation significant strategic influence beyond its region. The deal moreover bolsters economic relations between South Korea and Poland as well as the European Union which further increases the benefits of the agreement.

Time will tell to what extent South Korean products can hold their own on the European market. This will also depend on how the Russian war of aggression in Ukraine progresses and how Germany continues to shape its 'Zeitwende'. However, Korea is an ambitious first-time competitor that could become more than just a stopgap in Europe.

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