

Introduction

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Editor-in-Chief

South Korea has rapidly emerged as a major player in the global defense industry. As conflicts intensify, military expenditures rise, and countries seek to modernize their armed forces, South Korean defense companies have expanded their presence across a growing number of markets. From artillery and armored vehicles to aircraft and naval platforms, South Korea is increasingly viewed as a serious defense industrial partner.

Much has been written about the factors behind this success, including competitive pricing, rapid production and delivery, and a willingness to pursue technology transfer and local production. However, there has been comparatively less analysis reflecting on the lessons learned from recent export campaigns, both successful and unsuccessful, and across the full spectrum of capability domains. There has also been insufficient attention to how the factors shaping South Korea's defense partnerships vary across countries and regions, and what these differences mean for how South Korea approaches individual

markets. The perspectives of South Korea's defense partners are important in understanding how procurement decisions are made, where Korean companies have succeeded or fallen short, and what partners expect from future cooperation.

This issue of the *Asan Security Quarterly* examines South Korea's defense industry from both Korean and partner-country perspectives. Kang Eunho, former Minister of South Korea's Defense Acquisition Program Administration (DAPA), opens the issue by considering how South Korea can move beyond arms exports toward becoming a leading partner in international defense cooperation. Hideshi Tokuchi, former Japanese Vice Minister for Defense and president of the Research Institute for Peace and Security (RIPS), examines South Korea–Japan defense industrial cooperation, emphasizing the importance of sustained political leadership. Bill Paterson, former Australian Ambassador to South Korea, assesses Australia–South Korea defense industrial cooperation and calls for a longer-term approach that builds on their

complementary strengths. Hunter Stires, former Maritime Strategist to the U.S. Secretary of the Navy, examines South Korea's role in revitalizing the U.S. maritime industrial base, arguing that Korean shipbuilders should move beyond overseas production toward long-term investment, technology transfer, and industrial integration in the United States.

Other contributions take a broader regional perspective. Eric J. Ballbach, Korea Foundation Fellow at the German Institute for International and Security Affairs (SWP), examines how approaches to defense industrial cooperation with South Korea differ across Europe. Abdul Rahman Bin Yaacob, research fellow at the Rabdan Security and Defense Institute, highlights the distinct procurement needs and threat perceptions shaping South Korea's opportunities across Southeast Asia. Kristian Alexander, gulf security analyst, and Leonardo Mazzucco, PhD candidate at the Catholic University of the Sacred Heart of Italy, assess South Korea's growing defense partnership with the Arab Gulf states, highlighting opportunities in air and missile defense, localization, and emerging maritime capabilities.

Together, these perspectives shed light on how South Korea can deepen existing partnerships, enter new markets, and sustain its growing role in the global defense industry. They also reveal important differences across countries and regions, underscoring the need for South Korea to tailor its approach to the distinct strategic priorities,

procurement requirements, and industrial expectations of individual partners. At the same time, one common thread in all of these articles is the importance of moving away from the buyer-seller mentality centered on the export of defense platforms. The next chapter for Korea's defense industry will be to pursue innovative co-development and co-production arrangements, partnering with defense businesses to pursue third-country opportunities, and harnessing emerging manufacturing technologies and processes to accelerate localization.

Turning to the Korea Corner, Kim Jaeseong, senior research fellow at the Korea Institute for Defense Analyses, provides an overview of South Korea's shrinking pool of military manpower amid demographic decline and examines potential policy responses to address the growing personnel shortage. We hope this issue offers a useful perspective on South Korea's evolving defense landscape and its growing role in international defense cooperation. We look forward to your continued readership and engagement.

Sincerely yours,

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