



U.S. fighter jets fly over the Korean Peninsula. Source: South Korean Defense Ministry via Getty Images

WHAT'S AT ISSUE?

South Korea, officially the Republic of Korea (ROK), one of America's closest strategic and economic partners, has relied for decades on American security cooperation to build and maintain credible deterrence against North Korea and other potential adversaries. But economic interests, compounded by the Trump administration's unpredictable North Korea diplomacy and singular focus on making South Korea pay more for U.S. troops, have driven South Korea's urgency in bolstering its domestic arms industry while seeking a greater degree of operational autonomy from the United States.

THE U.S.-SOUTH KOREA ARMS PARTNERSHIP

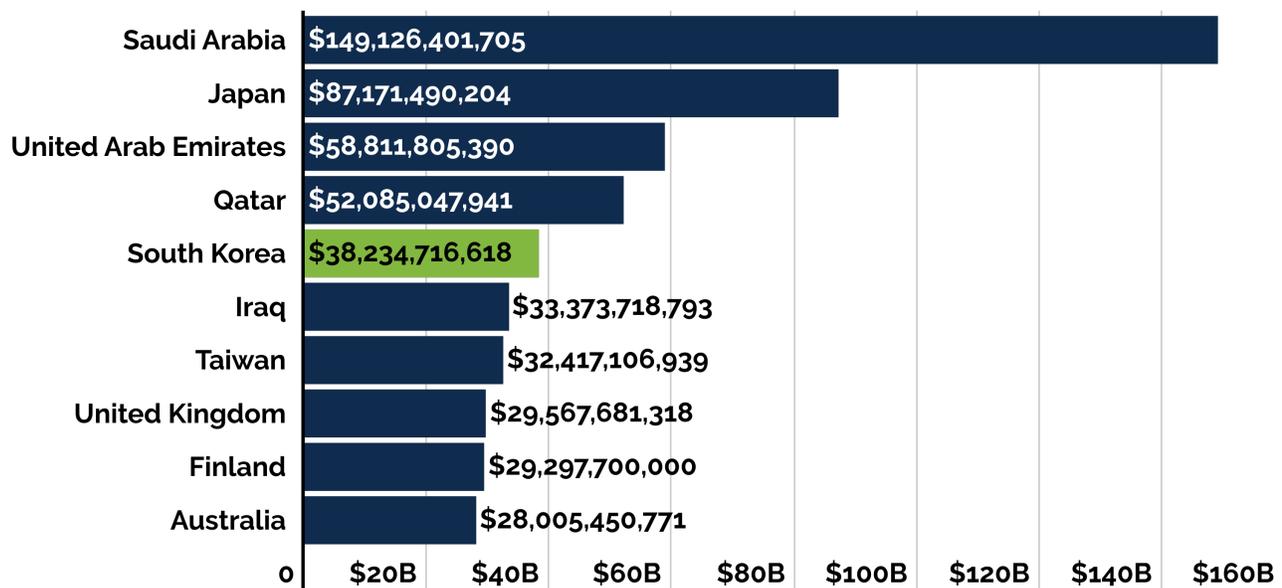
The United States has maintained a considerable military presence on the Korean Peninsula since the end of World War II. [As of 2020](#), South Korea hosted 28,500 U.S. military personnel as well as America's largest overseas military base, Camp Humphreys. Since the de facto end of the Korean War in 1953, the sale of U.S. defense articles and services has also been instrumental to the modernization and professionalization of the Korean military. Since 2010, the U.S. has notified Congress of more than \$38 billion in proposed arms sales to Seoul, making it the fifth largest U.S arms sales recipient since 2010.

Of that \$38 billion, over \$32 billion was dedicated to bolstering Korean air power with new aircraft, aircraft upgrades, and air-to-air/air-to-surface munitions. Notifications for aircraft and non-lethal aircraft capabilities, such as command & control systems, topped \$1 billion in

2020, 2019, 2015, 2013, 2012, and 2009. The largest single arms sales notification for South Korea came in 2013 for the sale of \$10.8 billion worth of new F-35 Lightning II multirole fighters, accompanied by \$793 million in F-35 weapons. In 2012, Congress was notified of \$8.4 billion in potential aircraft sales, specifically for MH-60 Seahawks, RQ-4 Global Hawk UAVs, and AH-1Z Cobra & AH-64D Apache attack helicopters.

Seoul has also invested considerably in other U.S. supported capabilities, including naval weapon systems as well as ships and ship parts, land-based air defenses, and small arms munitions. Despite the volume of U.S. arms sales to South Korea, however, Seoul is increasingly looking to establish a greater degree of autonomy in security and weapons production.

Top 10 Arms Sales Notification Recipients Since 2010



THE STATE OF THE U.S.-SOUTH KOREA SECURITY RELATIONSHIP

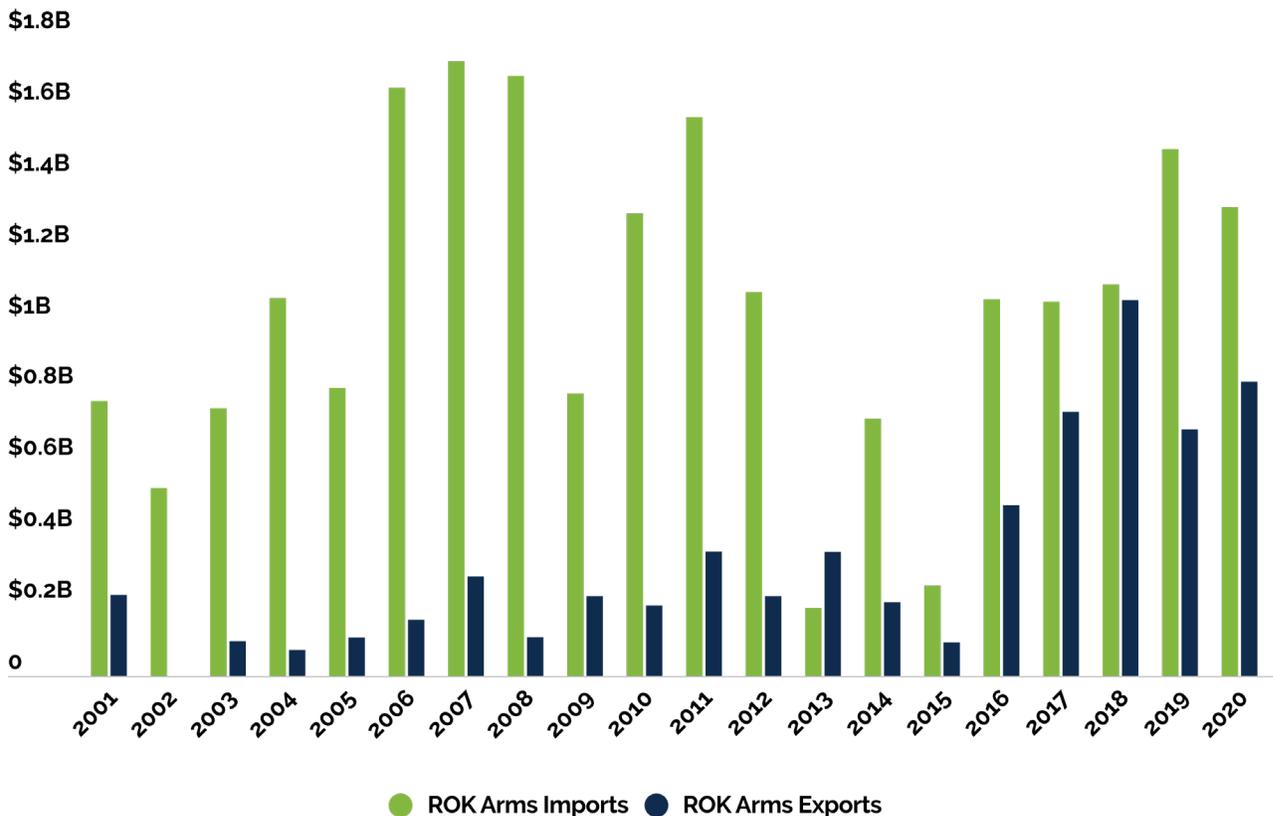
President Biden has taken a more predictable – albeit less ambitious – approach to the Korean Peninsula than his predecessor, but the Biden administration’s Great Power Competition strategy – and its efforts to [secure a commitment](#) to that strategy from Pacific allies – has put South Korea, a close [trade partner](#) with Beijing, in a [difficult position](#).

China’s [limited](#) political influence in North Korea has also played a role in maintaining South Korean security. [Recent Chinese efforts](#) to avert a security crisis caused by [North Korean nuclear threats](#) exemplifies its diplomatic value to South Korea.

The China-South Korea relationship has been [far from perfect](#), however, and the United

States remains a key South Korean ally. In May, President Moon [remarked](#) in a joint press conference with President Biden that “the world is welcoming America’s return.” And, although the election of Donald Trump and the COVID-19 crisis have both done [significant damage](#) to America’s reputation in Korea, recent polling indicates that Koreans on average [prefer the U.S. to China](#) (the same polling suggests that only half of Koreans think U.S.-China competition is “a critical threat to South Korea”). The South Korean political establishment also indicated its willingness to compromise by agreeing to pay [13.9% more](#) for the U.S. troops stationed in Korea.

ROK Arms Imports vs. ROK Arms Exports Since 2001



South Korea’s current strategy entails [maintaining positive relations](#) with both powers in the short term while making a bid to achieve greater strategic autonomy in the long term. To that end, South Korean leaders recently secured U.S. permission to terminate range restrictions on Korean missiles. While American defense policymakers had intended for the decision to send a [message to China](#), South Korean leaders trumpeted the return to “[missile sovereignty](#)” as a sign of national strength and a cause for patriotic celebration. South Korean leaders have long sought to establish [operational control](#) on the Korean Peninsula to exert greater agency in a region where they feel the U.S. has too often [subordinated](#) Korean interests to those of other regional partners, and [Japan in particular](#).

SOUTH KOREA'S GROWING ARMS INDUSTRY

Although the U.S. military and the R.O.K. Armed Forces have cooperated closely for decades via joint exercises and joint military installations, national pride and [concerns](#) about America's reliability as a global ally have expedited a [multi-year effort](#) by South Korea to move away from its reliance on American-made weapons. The Korean defense budget submitted in 2019 committed to increasing defense spending by [7% per year](#), specifically allocating \$85 billion between 2020 and 2024 for "arms improvement." South Korea has already begun to reap the early rewards of this investment: the Korean Ministry of Defense recently unveiled a new prototype for the [KF-21 Boramae](#), a "4.5" generation fighter jet produced in tandem with Indonesia. In the past year, South Korea jumped from the 8th to the 6th [largest global supplier of arms](#), exporting \$827 million worth of weapons in 2020.

The KF-21 is still in its prototype phase, however, and Indonesia has indicated that it may withdraw from the project. Meanwhile, South Korea is still purchasing American arms. It continues, for example, to receive [F-35 aircraft and components](#) via a deal made in 2019. In 2018, direct commercial sales procurement contracts comprised [nearly a third](#) (\$1.3 billion) of South Korean spending on foreign procurement contracts (\$3.8 billion). And despite growing domestic production, South Korea still [imported](#) \$1.3 billion worth of arms in 2020, making it the 4th largest arms importer in the world behind Australia, Saudi Arabia, and India.

Categories of Major Arms Notifications 2009-2020



\$28,444,600,000

Fixed, Rotary, and Remote Aircraft Parts and Services



\$5,977,170,238

Missiles and Munitions



\$4,600,000,000

Naval Craft and Capabilities



\$4,427,100,000

Electronic Systems



\$332,220,346

Small Arms, Artillery, Ammunition, and Accessories