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Europe-South Korea Relations in a Deteriorating International Environment

*Tasks and Prospects for Cooperation Over the
Medium-Term (2025-2030)*



Introduction: Background

The international order has come under such stress over the last decade that it is difficult to refer to it as an order at all. To wit: Russia's seizure of Crimea in 2014 and full-scale invasion of Ukraine beginning in 2022; the centrifugal effects of US-China strategic competition; persistent Chinese harassment of Taiwan and hybrid attacks against the Philippines; multiple conflicts in the Middle East; North Korean and Iranian nuclear weapon proliferation; the US lurch toward domestic authoritarianism accompanied by disregard for international law and abandonment of mutually beneficial trade partnerships; and the partial collapse of multilateral organizations and institutions responsible for international governance of important areas such as the environment, global public health, human rights, cyberspace, and artificial intelligence. Together, these crises—the contemporary “polycrisis”—have gravely undermined the notion and practice of the international “rules-based” order.¹

Middle powers typically suffer from such a deteriorated international environment, and South Korea and Europe (both the European Union (EU) and its member states) are not immune. Beyond sharing several of their own, self-caused problems—including domestic political instability, demographic challenges, and weakening economic fundamentals—both South Korea and Europe have become caught in a difficult international situation: albeit differently, they are each stuck between revisionist powers with varying intentions and capacities to enact them.

South Korea is a close neighbor of China, a revisionist potential East Asia hegemon that has tacitly supported North Korean nuclear weapon acquisition, punished South Korea economically for Seoul's alliance with Washington, and possibly begun a hybrid warfare campaign against South Korea in the Yellow Sea.² Seoul is also challenged by its division from North Korea, a nuclear-armed rogue state with the capability to destabilize the Korean Peninsula. Finally, the US, South Korea's long-time security and defense ally, has grown both increasingly authoritarian domestically and injurious to the international rules-based order (under the aegis of US President Donald Trump's “Make America Great Again” ethos). Consequently, Washington has become less credible both as a values-partner and a reliable foundation for combined US-South Korea deterrence. Addi-

tionally, Washington's bullying trade and economic/investment demands of Seoul are both a risk to South Korean economic prosperity and an expression of transactionalism over shared order-building.³

For its part, Europe—both Brussels and the European capitals, as well as European NATO—is facing its biggest overt threat to regional peace and security since the Cold War, as Russia's war of aggression against Ukraine threatens to escalate both horizontally to other European states and vertically toward possible (if still highly unlikely) nuclear weapon use.⁴ Meanwhile, China—once considered an “economic competitor” and “systemic rival,” but also a “necessary partner” in certain areas (e.g., climate change)—has significantly lost its role as “partner” for Europe.⁵ Instead, as an economic competitor it is increasingly a mercantilist economy predatory towards European companies and market share, a trend likely to continue as the Trump administration partially decouples from China, driving Beijing to aim at greater shares of alternative markets. Additionally, China as “systemic rival” not only selectively instrumentalizes international multilateral organizations, but is actively undermining European security and the United Nations Charter via under-the-radar support of Russia's war in Ukraine.⁶ And, finally, as with South Korea, Europe is profoundly unsettled by nascent US authoritarianism, economic and trade distortion and extortion, undermining of the international rules-based order, unreliability (bordering on hostility) toward the EU, and ambivalent interest in supporting security and defense via NATO.

Consequently, South Korea and Europe are not only navigating this perilous foreign policy landscape, but also acting in novel ways to advance alternative order-maintenance and order-building mechanisms that can mitigate the currently heightened risks of a destabilized international system. That is, like numerous other middle powers negatively affected by great power competition and revisionism, Europe and South Korea are cooperating as strategic partners to buttress their security and prosperity. However, the level of cooperation still lags the urgent necessity of the moment, and it is unclear to what extent the new South Korean government under President Lee Jae-myung will prioritize relations with Europe. For its part, Europe also faces challenges to fully realize its own Indo-Pacific “pivot” and privilege cooperation with strategic partners such as South Korea.

- 1 Matthew Cantor. 2025. “What is this era of calamity we're in? Some say 'polycrisis' captures it.” *The Guardian*. March 6. <https://www.theguardian.com/us-news/2025/mar/06/polycrisis-disasters-politics>; European Commission. 2025. 2025 Strategic Foresight Report. September 9. https://commission.europa.eu/strategy-and-policy/strategic-foresight/2025-strategic-foresight-report_en
- 2 Roh Suk-jo and Kim Dong-hyun. 2025. “Seoul demands removal of Chinese platforms in Yellow Sea; Beijing claims they're legal fish farms.” *Chosun Daily*. April 25. <https://www.chosun.com/english/national-en/2025/04/25/WSYW3BGQGRDVNHZ52WFNNNGJ14/>
- 3 Um Ji-won and Seo Young-ji. 2025. “Will Korea's Lee succeed in walking the tightrope between US, China.” *Hankyoreh*. October 16. https://english.hani.co.kr/arti/english_edition/e_international/1223796.html
- 4 Nicu Popescu. 2025. “Why Russia's actions pose a threat well beyond its neighbours.” *European Council on Foreign Relations (Commentary)*. March 21. <https://ecfr.eu/article/why-russias-actions-pose-a-threat-well-beyond-its-neighbours/>
- 5 Stuart Lau. 2024. “China won't like the sound of EU Commissioner hearings. Here's why.” *Politico*. October 2. <https://www.politico.eu/article/eu-commission-braces-tougher-relationship-china-trade-kaja-kallas/>
- 6 Nick Walsh. 2025. China tells EU it can't accept Russia losing its war against Ukraine, official says. *CNN*. July 4. <https://edition.cnn.com/2025/07/04/europe/china-ukraine-eu-war-intl>

Despite this uncertainty, the EU and South Korea have a unique chance to cooperate in ways that open new paths for international order. That is, seen negatively, today's global risks necessitate enhanced EU-South Korea cooperation, but they also offer positive opportunity to fill a void in international order, precisely at a time when nascent and maturing technologies—artificial intelligence (AI), green transition technologies, digital trade, etc.—are ripe for standardization and multilateral governance. In this vein, this policy report examines the prospects for enhanced collaboration in important areas—diplomatic, security, defense, economic/trade, emerging technology, energy and environment—between Europe and South Korea over the medium-term (2025-2030).

The remainder of this report is as follows. After this Introduction, section I is a primer on the current South Korean and European political, security/defense, and diplomatic landscapes. Section II examines specific areas of and frameworks for EU-South Korea cooperation, serving as the foundation for an agenda of medium-term collaboration. Section III gives an assessment of cooperation sectors in terms of both prospects and challenges. Section IV covers constraints to deepened cooperation, while section V provides strategic recommendations for how to enhance the EU-South Korea strategic partnership in light of the foregoing. Section VI is the conclusion.

I.

Europe and South Korea: The State of Play Domestically and Internationally

South Korea's international trajectory in 2025 has been defined by its path toward restoring domestic normalcy following the constitutional crisis triggered by former conservative President Yoon Suk-yeol's martial law declaration in December 2024.⁷ The brief but shocking imposition of martial law, as an apparent tool of a self-coup, created political turmoil unprecedented during South Korea's democratic history. The crisis also precipitated a six-month period of stasis in South Korean relations with key international partners, including the EU, as the international community postponed high-level visits and substantive progress on cooperation areas while waiting for Seoul to resolve the issue of presidential impeachment and hold elections for a new government.

The presidential election of June 2025—won by progressive Democratic Party candidate Lee Jae-myung—marked an end to the political and diplomatic caesura. South Korea returned to normal diplomatic functions at a time of great upheaval, in significant part due to the return to power of Trump, whose trade policies in particular were (and still are) profoundly disruptive to global economics.

Consequently, Lee's administration has adopted an approach of "pragmatic" diplomacy designed to navigate the complex realities of great power competition, adapt to shakier relations between the US and its allies (including South Korea), underscore South Korea's return to democratic values, and reach out to diverse international partners (including other middle powers).⁸

With respect to the latter, the record on Europe has been mixed. The Lee government's policy blueprint only once mentions the European Union by name, but contains numerous projects for which Europe is either already a partner or would be naturally.⁹ Lee's participation (as an invited leader) at the June 2025 G7 summit was, however, a successful initial occasion to meet European leaders.¹⁰ He then missed a chance to deepen connections when he chose not to attend the July NATO summit as an Indo-Pacific 4 leader—instead sending his influential National Security Advisor, Wi Sung-lac—but nonetheless signaled (well-received) interest in advancing cooperation with Europe by dispatching special envoys to Brussels, Paris, Berlin, and London.¹¹

⁷ Jean Mackenzie. 2025. "The unravelling of Yoon Suk-yeol: South Korea's 'stubborn and hot-tempered' martial law president." BBC. April 4. <https://www.bbc.com/news/articles/c86py30qezvo>

⁸ Min Jeonghun. 2025. "An Overview of the New Lee Jae-myung Administration's Foreign Policy and Policy Recommendations." IFANS Focus. June 10. file:///C:/Users/hufs/Downloads/IFANS%20FOCUS%202025-15E(%EB%AF%BC%EC%A0%95%ED%9B%88).pdf

⁹ Kim Eun-jung. 2025. "Lee administration unveils five-year policy goals." Yonhap. August 13. <https://en.yna.co.kr/view/AEN20250813007400315>

¹⁰ Reuters. 2025. "South Korea's Lee plans to hold bilateral talks at G7 summit, his office says." Reuters. June 15. <https://www.reuters.com/world/americas/south-koreas-lee-plans-hold-bilateral-talks-g7-summit-his-office-says-2025-06-15/>

¹¹ Park Sang-ki and Park Su-hyeon. 2025. "Lee skips NATO, sending his advisor instead. Will that be enough?" Chosun Daily. June 24. <https://www.chosun.com/english/national-en/2025/06/24/SMX6ASWGFVCDPEBZH36KTA6OA/>; Kim Soo-yeon. 2025. "Lee appoints special envoys to EU, France, Britain, India." Yonhap. July 13. <https://en.yna.co.kr/view/AEN20250713002600315>

Lee also met with selected European leaders—Italy, Poland, the Czech Republic—during the UN General Assembly high-level week in late September 2025.¹² In October, South Korean Unification Minister Chung Dong-young demonstrated interest in greater EU involvement with Korean Peninsula affairs during a swing through Europe, as he called on the EU to appoint a Special Representative for the Korean Peninsula.¹³

Even if much of South Korea's diplomatic calendar since Lee's inauguration has been filled with efforts at dealing with the US and China, the aforementioned interactions—as well as other, lower-level meetings—demonstrate that Lee's government has a reservoir of interest in cooperation with Europe as a strategic partner. They also come at a time when Europe is interested in deepening connections with South Korea, despite—indeed in part because—it is itself experiencing domestic political fragility amid a difficult international environment. Russia is a hostile neighbor. China is undermining multilateral institutions, quietly supporting Russia in Ukraine, and increasingly exporting its internal economic imbalances in a way that encroaches on Europe's economic strength. Relations with the US are rocky both on the EU and NATO levels. Thus Seoul's interest in collaborating with Europe comes at an opportune moment for Brussels and the European capitals.

The bottom line is that both South Korea and Europe share a need to cultivate pragmatic, alternative partnerships that can alleviate the “Scylla and Charybdis” binary choice between the US and China, thus providing greater strategic autonomy and economic diversification. Of course, there is

no substitute for maintaining productive economic, diplomatic, and/or security relations with US and China, but Europe and South Korea each offer the other an additional pillar for foreign, security/defense, and economic policy.

Both Europe and the Lee administration recognize that cooperation spans numerous critical areas that align with each other's interests and values. In the technology sector, partnerships with European countries can help South Korea maintain its competitive edge while reducing reliance on potentially volatile supply chains and augmenting capacity to define future technology standards. Energy and climate cooperation offer opportunities for joint leadership on one of the defining challenges of the 21st century. Security and defense partnerships can contribute to evolving security and defense requirements—spanning nuclear non-proliferation/counter-proliferation to defense-industrial cooperation—in increasingly complex and dangerous regional environments. Nontraditional security issues—such as undersea cable connectivity, cybersecurity, global public health, human rights, etc.—are high-demand challenges in which South Korea and Europe have a potentially special role to play, especially if the US recedes in these areas.

The prospects for the EU-South Korea strategic partnership from fall 2025 through the medium-term (2030) must be understood within a context of South Korea's pragmatic diplomatic renewal and Europe's forward-looking, realistic assessment of its strengths and vulnerabilities. Success will require careful navigation of competing interests, sustained political commitment, and creative solutions to emerging challenges in an increasingly complex global environment.

II.

EU–South Korea Strategic Partnership: Framework for a Medium-Term Agenda of Europe-South Korea Cooperation Under Lee Jae-myung

As of fall 2025, the diplomatic lodestar for EU-South Korea relations is a leader-level summit in the first half of 2026. The ongoing Washington-Seoul trade dispute and South Korea's hosting of the 2025 APEC leaders' meeting in late

October/early November preclude most other substantial Lee administration diplomacy, but the post-APEC months should permit a series of high-level diplomatic engagements: EU-South Korea Security and Defense Dialogue,

¹² Anna Park. 2025. “President Lee returns to Korea after 5-day US visit for UN General Assembly.” Korea Times. September 26. <https://www.koreatimes.co.kr/southkorea/politics/20250926/president-lee-returns-to-korea-after-5-day-us-visit-for-un-general-assembly>

¹³ Kim Soo-yeon. 2025. “Unification minister says requested EU designate special envoy on Korean Peninsula affairs.” Yonhap. October 15. <https://en.yna.co.kr/view/AEN20251015008500315>

EEAS-MOFA vice-ministerial meeting, and other senior official level dialogues. These meetings should set up a ministerial level dialogue (EU-South Korea Strategic Dialogue) that will in turn set the foundation, and the framework of deliverables, for the leader-level summit in the first half of 2026.

This engagement process will focus on numerous areas of clear interest overlap: e.g., improved trade and digital partnerships, expanded technology and innovation cooperation, deeper security coordination and defense-industrial cooperation, and strengthened collaboration via multilateral fora. However, there are also foreseeable gaps—such as European desire for more South Korean involvement in helping Ukraine counter Russia—that will require careful management.

A. Strategic Partnership: Framework Agreement, Free Trade Agreement, Crisis Management Agreement

The EU-South Korea strategic partnership, established in 2010, has undergone significant evolution in recent years, but is ultimately anchored in a political framework agreement from 2014 that orients the direction of political cooperation.¹⁴ The relationship weathered South Korea's constitutional crisis and martial law episode in late 2024 and into 2025, which, while creating temporary uncertainty, ultimately demonstrated South Korea's democratic resilience and reinforced shared values with the EU.

The framework agreement is buttressed by a free trade agreement (EU-South Korea FTA), which has allowed two-way trade and investment to grow substantially since 2011. The EU and South Korea are now major—top ten—trade and economic/investment partners. Finally, the EU-South Korea strategic partnership includes a crisis management agreement (2016) structuring the mechanisms by the which the EU and South Korea work together on crisis management operations.

B. Economic Relations

Since the signing of the FTA in July 2011, EU-South Korea bilateral trade and investment have greatly expanded. In 2024, total bilateral trade in goods amounted to approximately €123.8 billion, representing a 96.51% increase from the 2011 level (approximately €63 billion).¹⁵ This growth trajectory demonstrates the success of economic integration efforts. There is no particular priority on updating or revising the EU-South Korea FTA.

However, the conclusion of a Digital Trade Agreement negotiation in early 2025 represents a new watershed moment for economic relations between the EU and South Korea.¹⁶ This agreement establishes binding rules for digital commerce, data flows, and consumer protection while providing legal certainty for businesses operating across both markets. Progress on implementation should be an EU-South Korea priority.

C. Green Partnership and Green Transition

Climate cooperation represents another important area of overlap, with both the EU and South Korea committed to achieving nationally determined contributions and leading the global green transition. South Korea and Europe both have Green New Deals in force that are now housed under a Green Partnership offering multiple avenues for collaboration in clean technologies, sustainable finance, and climate diplomacy.¹⁷

D. Security and Defense Partnership

The EU-South Korea Security and Defense Partnership of 2024 lays out a series of areas for expanded cooperation based on the EU-South Korea strategic partnership framework agreements, as well as the two polities' compatible strategic documents (e.g., Indo-Pacific strategies).¹⁸ Specific areas for further development include space and information security, hybrid threats (cybersecurity, undersea cables, FIMI (foreign information manipulation and interference), etc.), maritime security (CRIMARIO (maritime domain awareness), UNCLOS support), non-/counter-proliferation of weapons of mass destruction, and counter-terrorism and counter-piracy.

South Korean participation in an EU Security and Defense Partnership also opens the perspective that Seoul could access important EU financing and market mechanisms for defense-industrial base development and weapons acquisition/procurement opportunities. South Korea is already a meaningful weapons supplier for selected EU member states (Poland, Czech Republic, Finland, Romania), and could theoretically increase that role under the aegis of the EU's SAFE and ReARM programs.¹⁹

E. Technology and Innovation Cooperation

This is arguably the domain with the most upside in terms of governance norms and standard-setting by middle powers such as the EU and South Korea,

¹⁴ European External Action Service. 2020. EU-Republic of Korea Strategic Partnership. June. https://www.eeas.europa.eu/eeas/eu-republic-korea-strategic-partnership_en

¹⁵ European Commission. 2025. Trade and Economic Security—South Korea. https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/south-korea_en

¹⁶ European Commission. 2025. EU-South Korea Free Trade Agreement and Digital Trade Agreement. https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/south-korea/eu-south-korea-agreements_en

¹⁷ European Commission. 2023. Press Release—European Green Deal. May 22. https://ec.europa.eu/commission/presscorner/detail/en/ip_23_2816

¹⁸ European External Action Service. 2024. Security and Defence Partnership between the European Union and the Republic of Korea. 2024. <https://www.eeas.europa.eu/sites/default/files/documents/2024/EU-RoK%20Security%20and%20Defence%20Partnership.pdf>

¹⁹ European Commission. 2025. SAFE—Security Action for Europe. https://defence-industry-space.ec.europa.eu/eu-defence-industry/safe-security-action-europe_en

as emerging technology like AI and cutting-edge chips are ripe for coverage by international consensus via multilateral bodies. Beyond this dimension of technology and innovation cooperation, two years after South Korea officially expressed its intention to join Horizon Europe in 2022, South Korea and the EU signed a Horizon Europe agreement, which allows South Korea to participate in that scheme as of 2025.²⁰ This integration into the EU's flagship research and innovation program signals deepening scientific cooperation. This agreement also requires further progress on implementation.

F. Economic Security Imperatives

In May 2024 South Korea announced a ₩26 trillion (€19 billion) support package for its chip businesses, citing a need to keep pace in areas like chip design and contract manufacturing amid a hyper-competitive and shifting global semiconductor market.²¹ This could theoretically complement technology efforts by the EU. The convergence of EU and South Korean approaches to economic security—particularly regarding supply chain resilience, technology sovereignty, and critical raw materials—creates opportunities for enhanced cooperation. This is an important area of needed progress, especially in the context of US and Chinese protectionist/predatory practices in this domain.

III.

Sectoral Analysis: Prospects and Challenges

A. Trade and Economic Cooperation: The EU-South Korea FTA has been highly successful, with bilateral trade nearly doubling since its implementation. The recently concluded Digital Trade Agreement will further enhance economic integration.

Medium Term Prospects:

- Full implementation and utilization of the Digital Trade Agreement, potentially serving as a model for other partnerships
- Expanded services trade, particularly in digital services, financial services, and professional services
- Enhanced investment flows in both directions, particularly in green technologies and digital infrastructure
- Deeper cooperation in standard-setting for emerging technologies

Challenges: Managing potential trade imbalances, addressing non-tariff barriers and EU steel tariffs, and ensuring fair competition in subsidized sectors like semiconductors.

B. Green Partnership and Green Transition: Both partners have ambitious climate commitments and green tran-

sition strategies, creating natural areas for cooperation.

Medium Term Prospects:

- Joint development and/or deployment of clean energy technologies, including innovative small modular reactors (i-SMRs), next-generation batteries, etc.
- Cooperation on green hydrogen and renewable energy systems
- Coordination on sustainable finance and green investment standards
- Joint initiatives on carbon pricing and border adjustment mechanisms
- Enhanced cooperation on climate diplomacy and international negotiations

Challenges: Aligning different approaches to nuclear energy and being wary of possible South Korean nuclear energy market stagnation, overcoming differences in European and South Korea energy grid architecture, managing competition in green technology markets and ensuring just transition policies, and EU assistance for South Korean SMEs navigating the Carbon Border Adjustment Mechanism (CBAM).

²⁰ European Commission. 2025. Research and Innovation—South Korea. https://research-and-innovation.ec.europa.eu/strategy/strategy-research-and-innovation/europe-world/international-cooperation/association-horizon-europe/korea_en

²¹ Reuters. 2025. South Korea unveils \$23 billion support package for chips amid US tariff uncertainty. Reuters. April 15. <https://www.reuters.com/technology/south-korea-unveils-23-billion-support-package-chips-amid-us-tariff-uncertainty-2025-04-14/>

C. Security and Defense Partnership: The November 2024 security and defense agreement established a framework for cooperation across 15 areas, representing a significant upgrade in security partnership.

Medium Term Prospects:

- Enhanced intelligence sharing and coordination on hybrid threats
- Joint capacity building programs for cybersecurity, space security, and FIMI
- Coordinated responses to maritime security challenges in the Indo-Pacific
- Continued South Korean commitment to the NATO IP4 mechanism, supported by the EU
- Potential South Korean participation in EU security initiatives and vice versa
- Enhanced cooperation on non-proliferation/counter-proliferation and export controls
- Synergistic defense-industrial base cooperation, possibly including in the ReARM and SAFE contexts
- Exchange of experiences and best-practices regarding modern (e.g., drone) warfare

Challenges: Balancing security cooperation with existing alliance commitments (particularly South Korea's relationship with the US and Japan), finding human resource bandwidth for added tasks, simplifying regulatory burdens for defense-industrial cooperation (especially for potential ReARM/SAFE projects), and finding consensus on countering Russia in its war against Ukraine.

D. Technology and Innovation Cooperation

Current Status: South Korea's integration into Horizon Europe and bilateral cooperation in semiconductors, 6G, and cybersecurity provide a strong foundation for technology partnership.

Medium Term Prospects:

- Expanded joint research and development programs in critical and emerging technologies
- Coordination on technology standards and regulations
- Joint initiatives on artificial intelligence governance and ethics

- Enhanced cooperation on quantum technologies and advanced computing
- Collaborative approaches to technology transfer and intellectual property protection

Challenges: Managing technology transfer concerns, ensuring reciprocal access, and balancing innovation with security considerations.

E. Economic Security Imperatives

Current Status: South Korea and EU supply chain integration for critical economic sectors (e.g., semiconductors, advanced optics, specialty chemicals, etc.) is a strong foundation for possible expansion.

Medium Term Prospects:

- Expanding labor mobility
- Coordination on industrial policy to minimize distortion
- Enhanced cooperation on components for quantum technologies, AI, and advanced computing
- Cooperating with non-great powers (such as Japan, Canada, Australia, etc.) for supply chain resilience and diversification, including for critical inputs (e.g., specialty raw materials, specialty chemicals, leading-edge components, etc.)

Challenges: Cooperating with third parties to establish alternate open trade institutions and avoiding beggar-thy-neighbor policies and/or falling back into over-reliance on great powers.

IV.

Constraints

A. Domestic Political Factors

South Korea's political instability following the 2024-2025 constitutional crisis creates uncertainty about policy continuity. While democratic institutions proved resilient, ongoing political polarization and potential changes in government could affect the pace and scope of EU-South Korea cooperation. The Lee administration has admirably signaled interest in deepening the relationship with Europe, but will face bandwidth tests as variegated diplomatic issues arise with the US, China, and North Korea.

The EU faces its own internal challenges, including managing diverse member state interests, navigating the implications of recent European Parliament elections, as well as upcoming member state elections, and addressing economic pressures from global competition. Finally, and arguably most importantly over the short- and medium-term, the EU and its member states are focused on countering Russia in Ukraine and the rest of Europe. To the extent that South Korea under Lee does not prioritize this issue, Europe-South Korea relations will be suboptimal, particularly with respect to South Korean participation in SAFE/ReARM defense-industrial programs.

B. Trilateral Dynamics

The US factor remains crucial in EU-South Korea relations. South Korea's alliance with the US creates both opportunities and constraints for EU cooperation.

Managing these trilateral dynamics while pursuing autonomous strategic partnerships requires careful coordination. The same holds true—albeit with a more rivalrous valence—for relations with China. Meanwhile, the Japan-South Korea relationship, while improving, is fragile (and likely to be affected by the new Japanese prime minister). Solid Japan-South Korea relations are important for regional order-building by middle powers in Europe and the Indo-Pacific, but are not guaranteed.

C. Economic Competition and Disputes

Despite overall positive economic relations, specific sectoral disputes may emerge, particularly in areas where both partners have strong industrial and labor interests such as semiconductors, automobiles, steel, and renewable energy technologies. Managing competition and market access while maintaining cooperation requires sophisticated policy coordination and dispute resolution mechanisms.

D. Bandwidth Issues

Both European and South Korean governing institutions (as well as the private sector) have human resource constraints on their ability to increase cooperation with other middle powers. Both also face potential constraints on capital for investment in each other's markets, depending on the degree to which their coerced future investments into the US are realized.

V.

Strategic Recommendations²²

A. Institutional Strengthening

1. Upgrade the Strategic Partnership's Implementation Activities: Europe (both the EU and member states) and South Korea need more human resource bandwidth to achieve goals that are reached rhetorically.
2. Create Deeper Sectoral Partnerships: Establish more active, more dedicated frameworks for cooperation in critical areas such as economic security, technology governance, hybrid threats, and climate action.

²² Listed by importance/desirability rather than feasibility.

3. Enhance Parliamentary Cooperation: Strengthen ties—notably at the level of relevant committees—between the European Parliament and the Korean National Assembly to build broader political support for the relationship.
4. EU Creation of a Special Envoy for Korean Peninsula Affairs: The EU should name a Special Representative to symbolically serve as a conduit for the EU approach to peace, security, and human rights issues on the Korean Peninsula.

B. Economic Integration and Technological Innovation Collaboration

1. Expand Open Trade Networks: Expand and network tariff-free and non-tariff-barrier-free trade relations with interested, like-minded third parties (e.g., Japan, Australia, New Zealand, Canada, inter alia) in order to begin constructing an alternative trade architecture to the increasingly coercive policies of China and the US.
2. Accelerate Digital Trade Implementation: Ensure swift implementation of the Digital Trade Agreement while using it as a foundation for broader digital cooperation.
3. Develop Economic Security Coordination: Create more usable and more action-oriented mechanisms for information sharing and policy coordination on supply chain resilience, critical technologies, and economic coercion.
4. Actively Facilitate South Korean Participation in Horizon Europe Projects: Assist South Korea with navigating bureaucratic complexities of Horizon Europe project participation.
5. Enhance Investment Cooperation: Negotiate investment facilitation agreements and create joint investment vehicles for strategic sectors.
6. Resolve Remaining EU-South Korea Trade Barriers: Find solutions for EU steel tariffs and South Korean agricultural trade barriers, inter alia.

C. Security Cooperation

1. Operationalize the Defense and Security Partnership: Develop concrete implementation plans for the 15 areas of security and defense cooperation identified in the November 2024 agreement. Special focus should be on the most feasible areas: intelligence-sharing, cybersecurity policy coordination, non-proliferation/counter-proliferation, inter alia.
2. Continued South Korean Supply to the European Weapons Market: South Korea should continue to employ its approach to the European arms market, featuring licensing and co-production agreements. Europe should encourage joint production lines and ensure financial and

procurement advantages for South Korea.

3. Support for Ukraine: South Korea should assist Europe in providing matériel to Ukraine; in return, Europe should privilege South Korean defense industry in procurement cooperation and financing instruments, including through SAFE/ReARM programs.
4. Establish a High-Level Defense Industry Dialogue: Beyond general dialogue on shared needs and interests, as well as capacity complementarity and deconfliction, a Defense Industry Dialogue between the EU and South Korea could take inspiration from the Italy-Japan-UK joint fighter jet initiative (GCAP) and identify areas for bi-lateral or minilateral defense technology development consortia.
5. Establish a High-Level Military Dialogue to Address the Russia-North Korea Alliance: This mechanism could discuss lessons learned from North Korea's battlefield experience in the Russia-Ukraine war, notably with respect to contemporary drone warfare, artillery use, and air defense.
6. Enhance Third-Party Cooperation: Develop joint approaches (particularly with Japan, Canada, Australia, inter alia) to security challenges in regions and functional areas of mutual interest. South Korea should also re-commit to NATO IP4 cooperation as a priority.
7. Support EU-South Korea Space Security Cooperation Via South Korea-Member State Mechanisms: Augment EU-South Korea space cooperation (through ESA and KASA, as well as ancillary agencies) via national level cooperation, such as the South Korea-France space security agreement.

D. Global Governance

1. Coordinate on Multilateral Institutions: Collaborate to strengthen and reform international institutions, including the WTO, WHO, and UN system.
2. Coordinate on Selected Areas of International Norms and Law at the Multilateral Level: Focus on collaborating on feasible areas of international multilateral governance action, such as cybersecurity, responsible use of AI, human rights compliance (especially in places of special interests, such as North Korea), use of outer space, international maritime law (e.g., strengthening UNCLOS), inter alia.
3. Lead on Global Standards: Jointly develop and promote international standards for emerging technologies, sustainable finance, and digital governance.
4. Enhance Climate Diplomacy: Coordinate positions in international climate negotiations and lead global efforts on climate finance and technology transfer.

VI.

Conclusion

EU-South Korea relations are at a pivotal juncture, with possible momentum for (but also risks to) deeper cooperation across multiple domains. The challenges of 2025, including South Korea's political crisis and changing global dynamics, have demonstrated the resilience of the strategic partnership with Europe while highlighting the importance of shared democratic values and strategic interests.

The medium-term prospects have positive potential supported by strong economic commonalities, converging interests, and successful recent agreements serving as a framework for more and better cooperation. However, realizing the full potential of the strategic partnership will require sustained political commitment by political leaders and firms, careful management of external relationships, and creative solutions to emerging challenges.

The EU and South Korea have the opportunity to expand and deepen their model strategic partnership, demonstrating how democratic middle powers can cooperate effectively in an increasingly multipolar, illiberal world. Success in this endeavor will require vision, pragmatism, and persistent engagement from leaders on both sides. The strategic partnership's evolution will influence broader patterns of international cooperation, the future of multilateralism, and the course of Europe and the Indo-Pacific region. For these reasons, EU-South Korea relations deserve priority attention and strategic investment in the years ahead. Seoul and Brussels need to frequently make their voices heard as to why they are worthy of each other's attention.

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