Poland–Korea: A New Defence Alliance

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The Emerging Poland–South Korea Military Partnership: Industry, Training, and Technology Exchange

Executive Summary

Poland and the Republic of Korea (ROK) have established one of the most dynamic new defence partnerships in recent years. Driven by Poland's urgent need to modernise its armed forces in the face of Russian aggression, and South Korea's strategic ambition to expand its defence industry

exports, the two states have concluded multi-billion-dollar contracts for tanks, howitzers, and rocket artillery systems. They are also initiating technology transfer agreements and joint training programs.

This briefing evaluates the trajectory of this emerging partnership with a focus on three core dimensions:

The analysis concludes that the partnership is mutually beneficial but not without risks. For Poland, it secures rapid deliveries and builds industrial capacity. For South Korea, it provides a strategic entry point into the European market. However, localisation, integration into NATO standards, and political sustainability will determine whether this partnership becomes a lasting model of transcontinental defence cooperation.

Introduction

Poland and the Republic of Korea (ROK) have rapidly established one of the most significant new defence partnerships in global security affairs. Over the past three years, Warsaw and Seoul have signed multi-billion-dollar contracts for tanks, howitzers, rocket artillery, and fighter aircraft, while also launching joint training programs and negotiating technology transfer arrangements. The pace and scope of this cooperation are unprecedented in Europe and highly significant for Asia, positioning Poland as South Korea's foremost defence partner within NATO.

This briefing addresses a central research question: how are Poland and South Korea expanding their defence cooperation, and what are the strategic, industrial, and policy implications of this partnership? The analysis concentrates on three dimensions of cooperation: industrial agreements and defence trade, joint training and interoperability, and technology transfer with localisation in Poland.

The issue matters for European defence planners who seek to strengthen NATO's eastern flank, for Korean industry actors entering European markets, and for EU policymakers evaluating diversification in supply chains. Theoretically, the case highlights the underexplored dynamics of transcontinental defence-industrial cooperation between middle powers, offering new insights into how security ties form outside traditional alliance structures.

The argument of this paper is straightforward: Poland and South Korea are building a mutually reinforcing partnership. Poland gains rapid access to advanced weaponry and opportunities for local production, while Korea secures a strategic foothold in Europe, raising its profile as a global defence exporter.

Strategic Background

Although Poland and South Korea are geographically distant, their security environments share a common logic. Both countries face proximate military threats, Warsaw from Russia and Seoul from North Korea. Both have

prioritised rapid modernisation of armed forces and the diversification of procurement sources.

For Poland, the Russian annexation of Crimea in 2014 and the subsequent full-scale war in Ukraine in 2022 accelerated defence modernisation. The government in Warsaw announced plans to increase defence spending to over 4% of GDP, one of the highest levels in NATO (Ministry of National Defence, 2022). Yet modernisation was constrained by bottlenecks among European and U.S. suppliers.

South Korea, meanwhile, has developed a comprehensive defence industry producing tanks, artillery, aircraft, and missiles. Firms such as Hyundai Rotem, Hanwha Aerospace, and Korea Aerospace Industries (KAI) are competitive internationally and backed by Seoul's policy of expanding arms exports (Hanwha Aerospace, 2025). Poland thus emerged as an ideal partner—willing to purchase in bulk and open to localising production.

Industrial Cooperation: Contracts and Deliveries

K2 "Black Panther" Tanks

In July 2022, Poland signed a framework agreement with Hyundai Rotem for up to 1,000 K2 tanks, including the Polish-adapted K2PL version. An initial execution contract covered 180 tanks, with deliveries beginning in December 2022. A follow-up deal in August 2025 secured an additional 180 units and enabled assembly in Gliwice (Reuters, 2025a). This phased strategy ensures Poland receives tanks quickly while gradually building its domestic industrial capacity.

K9 "Thunder" Howitzers

Poland also signed contracts with Hanwha Defence for 212 K9A1 howitzers, with deliveries beginning in late 2022 (Armament Agency, 2022a). The deal includes provisions for future K9PL localisation with Polish partners. Despite already operating NATO-standard Krab howitzers, Warsaw viewed Korea's faster delivery schedule and localisation commitments as decisive.

Homar-K Rocket Artillery

In November 2022, Poland acquired the Korean K239 Chunmoo system, rebranded as Homar-K. Mounted on Polish Jelcz trucks and integrated with WB Group's TOPAZ fire-control system, Homar-K represents the most localised system from the outset. Additional contracts in 2024 expanded procurement, with licensed missile production planned in Poland (Armament Agency, 2022b).

FA-50 Light Combat Aircraft

In 2022, Poland purchased 48 FA-50 fighters from KAI, with deliveries starting in 2023. A maintenance and training hub will be established in

Poland to ensure long-term sustainment (KAI, 2023). This program carries strategic weight: Poland is the FA-50's first European customer, giving Korea Aerospace Industries a direct entry point into the EU market.

Joint Training and Interoperability

Training and interoperability are central to the rapid integration of South Korean defence systems into the Polish Armed Forces.

In 2023, Polish pilots began training in South Korea on the FA-50 fighter jet, ensuring they were mission-ready by the time the first aircraft were delivered (MON, 2023). Similarly, Polish tank and artillery crews participated in joint training programs, both in Korea and domestically, under the supervision of Korean instructors. These programs significantly shortened the transition period from acquisition to operational deployment.

Beyond platform-specific instruction, cooperation has expanded into broader military-to-military interaction. In 2023, South Korean troops joined multinational exercises on Polish territory, marking Seoul's first deployment of military personnel to Europe as part of a coalition drill (Associated Press, 2023). This not only improved bilateral coordination but also enhanced interoperability within the NATO framework.

Technology Transfer and Localisation

One of the defining features of the Poland–South Korea defence partnership is its strong emphasis on localisation and technology transfer.

The K2PL and K9PL programs are structured to move progressively from partial assembly to full-scale production in Poland, expanding local industrial capabilities (MON, 2024). The Homar-K rocket artillery system has incorporated localisation from the outset by using Polish Jelcz trucks and domestic command systems, with licensed missile production scheduled to begin within three years. Similarly, the FA-50 program includes plans for a maintenance hub and training centre in Poland, enabling long-term regional sustainment.

For Poland, localisation generates industrial growth, job creation, and reduced dependence on external suppliers. For South Korea, it provides credibility with European customers, proving its willingness to adapt to local requirements while securing long-term market access.

Discussion: Benefits, Risks, and Perspectives

Benefits

The Poland–South Korea defence partnership delivers several tangible advantages for both sides. For Poland, the most immediate benefit lies in rapid delivery of advanced systems, which significantly enhances deterrence against Russia at a time of heightened regional insecurity. The partnership also allows Warsaw to diversify its procurement sources, reducing reliance

on U.S. and European suppliers that often face long production timelines or limited industrial flexibility.

For South Korea, the benefits are equally strategic. Poland has become a major export customer, securing Seoul's largest-ever defence contracts in Europe. Beyond economic gains, the partnership elevates South Korea's visibility within NATO, strengthening its reputation as a reliable global defence supplier.

Risks

Despite its promise, the partnership carries important risks. Poland is simultaneously managing four large-scale defence programs—tanks, howitzers, rocket artillery, and fighter aircraft—posing potential risks of overstretch for its defence industry. Localisation efforts, though ambitious, may face delays, prolonging reliance on imported systems and undermining domestic capacity-building goals.

Integration presents another challenge: adapting Korean systems to NATO standards is a complex process that could cause operational friction (AU, 2022b). Finally, political uncertainty in either Warsaw or Seoul could jeopardise long-term commitments, especially given the scale and duration of the contracts involved.

Comparative Perspectives

When analysed in comparative perspective, South Korea's offer stands out as far more attractive for Poland than those of its traditional defence suppliers in the United States and Germany. While Warsaw continues to rely on both Washington and Berlin for critical elements of its force structure, differences in delivery schedules, localisation opportunities, and industrial scalability explain why Seoul has rapidly emerged as a uniquely valuable partner.

The United States remains Poland's primary security guarantor, and its systems represent the cutting edge of NATO capabilities. Poland's purchase of the F-35 Lightning II, for instance, brings fifth-generation fighter technology into its air force, providing stealth, advanced sensors, and seamless integration with allied forces. These features are unmatched by any competitor. However, U.S. procurement is accompanied by significant drawbacks. Delivery schedules are long, often stretching nearly a decade from contract signing to full operational deployment. Moreover, American defence sales typically offer minimal localisation opportunities; production remains in U.S. facilities, with technology transfer tightly restricted. For Poland, this means that while it gains top-tier capability, there is little chance to expand its domestic defence industry or build up sovereign sustainment capacity.

Germany, by contrast, has historically been a central supplier of armoured vehicles to Poland. The Leopard 2 tank, widely operated across

Europe, has been the backbone of Polish armoured forces for decades. On paper, German systems offer advantages in terms of interoperability with NATO allies and potential industrial cooperation within the EU framework. Yet in practice, Berlin has struggled to meet Poland's urgent demands. Production bottlenecks have slowed deliveries, and difficulties in scaling up Leopard tank output have constrained Germany's ability to respond to Warsaw's accelerated procurement timelines. Political hesitancy within Germany regarding arms exports has further complicated matters, reinforcing perceptions in Warsaw that Berlin cannot always deliver quickly enough in moments of strategic urgency.

Against this backdrop, South Korea's offer has proven uniquely advantageous. The contracts for K2 tanks, K9 howitzers, Homar-K rocket artillery, and FA-50 aircraft are characterised by rapid delivery schedules, with initial batches arriving in Poland within months of contract signature (Armament Agency, 2022a Reuters, 2025a). Beyond speed, Seoul has offered competitive pricing that compares favourably with Western suppliers while still meeting NATO operational requirements. Perhaps most importantly, South Korea has made binding commitments to localisation and technology transfer. The phased production of K2PL tanks and K9PL howitzers in Polish facilities, combined with the integration of Polish trucks and fire-control systems into the Homar-K program, ensures genuine industrial participation from the outset (MON, 2024).

This combination of rapid delivery, cost-effectiveness, and localisation distinguishes South Korea from its traditional competitors. As Reuters (2025b) notes, Seoul's contracts with Warsaw represent not just arms sales but a strategic foothold in Europe's defence market. For Poland, the partnership provides immediate capabilities while strengthening its long-term industrial base. For South Korea, it demonstrates flexibility and reliability, enhancing its reputation as a global defence exporter.

Conclusion

The Poland–Korea defence partnership is emerging as a new model of transcontinental security cooperation. Its hallmarks are speed, scale, and localisation. Poland gains immediate capabilities and industrial development, while Korea secures a strategic gateway into Europe.

For EU and NATO policymakers, this case illustrates how Asian partners can play a direct role in strengthening Europe's eastern flank. For the Indo-Pacific, it shows how Seoul leverages arms exports to build global ties alongside its U.S. and Japanese alliances.

If localisation efforts succeed, this model could become a precedent for future Europe–Asia defence partnerships. If integration or timelines falter, it may instead become a cautionary tale. The next five years will be decisive in determining its long-term impact.