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ASIA-PACIFIC

# MACRON'S STATE VISIT AND THE CASE FOR A DEEPER KOREA-FRANCE SECURITY PARTNERSHIP

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## AUTHOR'S PRESENTATION



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President Macron's first visit to South Korea in nearly a decade opens a window for structural defence cooperation - from conventional arms to submarine propulsion - that neither side can afford to miss.

When French President Emmanuel Macron touched down in Seoul on April 2, the optics were unmistakable. Coming just a month after his landmark speech at the *Île Longue* naval base<sup>1</sup> — in which he announced the first increase in France's nuclear warhead count since 1992 and unveiled a doctrine of *dissuasion avancée* - the French president's arrival on the Korean Peninsula was not routine diplomacy. It was a strategic signal.

The summit itself delivered tangible results. The two countries elevated their bilateral relationship to a "Global Strategic Partnership"<sup>2</sup> - the first upgrade since the 21st century Comprehensive Partnership of 2004 - and signed eleven memoranda of understanding spanning critical minerals, semiconductors, quantum technologies, nuclear energy, and offshore wind. Korea Hydro & Nuclear Power inked cooperation agreements with French firms Orano and Framatome, laying the foundation for joint entry into the global nuclear market. On the security side, Macron was explicit: both nations, as major arms manufacturers, would work<sup>3</sup> to give their defence ties "a contemporary dimension" through joint exercises and deeper cooperation in critical military capabilities.

On the conventional side, the case for France to look seriously at South Korean defence industry is compelling. Russia's full-scale integration of coercive military capabilities in Ukraine, backed<sup>4</sup> by a deepening North Korea–Russia military nexus, has exposed the limits of European conventional stocks. The *Île Longue* speech was, in part, a response to this: Macron explicitly identified the need to raise the nuclear threshold as high as possible through collective conventional strength. Doing so requires filling real capability gaps. South Korea's defence industry - Hanwha Aerospace with its K9 Thunder howitzers and K239 Chunmoo multiple launch rocket systems, Hyundai Rotem with the K2 Black Panther main battle tank - has already become<sup>5</sup> the supplier of choice across much of northern Europe, from Poland to Norway. France has been slower to engage. That hesitancy now carries a strategic cost. The production capacity, competitive pricing, and NATO-interoperable systems that Seoul offers are precisely the kind of rapid conventional augmentation Paris needs to operationalise its

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<sup>1</sup> French Ministry for Europe and Foreign Affairs, "President Delivers Speech on France's Nuclear Deterrence," France Diplomacy, March 4, 2026.

<sup>2</sup> Bahk Eun-ji, "Lee, Macron Pledge Cooperation to Secure Passage Through Strait of Hormuz," *The Korea Times*, April 3, 2026.

<sup>3</sup> "South Korea and France Agree to Deepen Defense Cooperation amid Middle East Conflict," *CNBC*, April 3, 2026.

<sup>4</sup> Jonathan Rosenstein and Emily Cheesman, "What Macron's Changes to French Nuclear Policy Mean for European Security," *Atlantic Council*, March 4, 2026.

<sup>5</sup> Cheol Min Lee, "Are Long-Term NATO–South Korea Defense Ties Possible? Transitioning from an Arms Exporter to a Trusted Defense Partner," Carnegie Endowment for International Peace, February 18, 2026.

*dissuasion avancée* framework. A formal defence industrial partnership with firms such as Hanwha Systems and Hyundai Rotem would add both substance and credibility to Macron's pledge that European conventional strength will underpin the new deterrence architecture.

The more novel dimension concerns Seoul's nascent nuclear-powered submarine program. Following Trump's authorisation at the October 2025 APEC summit in Gyeongju, South Korea is now formally cleared to develop<sup>6</sup> nuclear-powered attack submarines. The propulsion fuel challenge remains the central technical and diplomatic hurdle. France, with its entirely sovereign nuclear fuel cycle and decades of operational experience running nuclear-powered ballistic missile submarines, is uniquely positioned in Europe to contribute to this conversation. Direct transfer of weapons-related nuclear technology is excluded by France's own doctrine and by the Non-Proliferation Treaty (NPT) framework and Paris knows better than most of the diplomatic cost of submarine deals gone wrong, having lost the Australian contract to AUKUS in 2021. Yet that experience also clarifies what a viable framework looks like: cooperation on naval nuclear propulsion, strictly distinct from weaponization, structured through a bilateral agreement with robust safeguards. The *Île Longue* speech itself carefully distinguished between France's sovereign nuclear force and the broader technological cooperation it invites with partners. In light of it, there is room for a structured Korea-France dialogue on submarine propulsion as Paris has both the capability and the strategic incentive to engage.

As Washington's reliability as an unconditional security guarantor comes under renewed question, South Korea has a clear interest in diversifying its diplomatic weight - building relationships with partners who can influence the international framing of the Korean Peninsula issue, sustain pressure on North Korea through multilateral sanctions architecture, and provide a counterweight to the kind of transactional security politics that has characterised the Trump era. France, as a country that has explicitly extended its definition of vital interests beyond its own borders, is precisely the kind of partner Seoul needs in that register. In this sense, the Global Strategic Partnership is as much a hedge for Seoul as it is an opportunity for Paris.

Both tracks share a common structural logic: France and South Korea face analogous security challenges from different angles. Seoul must deter a nuclear-armed North Korea that is now actively deepening<sup>7</sup> its military partnership with Moscow, while managing the uncertainty of US extended deterrence commitments. Paris must anchor a European security architecture

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<sup>6</sup> Jihoon Yu, "Game Changer: Trump Approves South Korea's Nuclear Submarine Ambition," *The Diplomat*, October 31, 2025.

<sup>7</sup> Kelsey Davenport, "U.S. Supports South Korean Enrichment, Reprocessing," *Arms Control Today*, December 2025.

that can no longer assume unconditional American backing, while confronting a Russia that has militarised nuclear signalling as an instrument of coercion. The North Korea–Russia axis makes this not merely a convergence of interests but a shared threat environment - one that argues for moving beyond symbolic partnership into operational and industrial alignment.

Macron’s visit to Seoul - the first by a French president in over a decade, coming directly after Japan - is itself evidence of a broader Indo-Pacific reorientation in French foreign policy. France has genuine interests in the region such as overseas territories, shipping lanes, and a credible claim to middle-power relevance beyond the Euro-Atlantic zone. For its part, South Korea has signalled through the bilateral upgrade that it seeks partners capable of complementing, not simply deferring to, the Washington-centric security architecture. The Global Strategic Partnership framework, and Macron’s invitation to South Korean President Lee Jae-myung for the G7 summit in Évian in June, suggest both sides understand the opportunity.

Converting that opportunity into durable cooperation will require more than MOUs. Three concrete steps need to be applied. First, Paris and Seoul should establish a dedicated bilateral defence and security dialogue which can function as a structured channel for strategic consultation on the Korean Peninsula, European security, and the Russia–North Korea nexus, distinct from existing multilateral forums. Second, the G7 Évian summit in June offers a natural occasion for Lee and Macron to move from a framework to specifics on defence industrial cooperation, with Hanwha and Hyundai Rotem at the table. Third, a formal working group on naval nuclear propulsion modelled on but distinct from the AUKUS technical arrangements would give the submarine cooperation track the institutional home it currently lacks.

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