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From Shared Pressure to Shared Capacity: ROK–UAE Defense Cooperation After the Iran War

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Abstract

The Iran War taught the United Arab Emirates (UAE) and the Republic of Korea (ROK) the same lesson by different routes. The UAE learned that when it came to the systems defending it, a more expansive and guaranteed set of resupply lines was the way forward. Korea learned that the assets defending it could leave. Both lessons have one source: a United States that now allocates its power more selectively across theaters, and says so in its own National Defense Strategy. Both countries are adapting, and their adaptations point toward each other. The UAE brings capital, wartime demand, an indigenization strategy, and a hub position; Korea brings production scale, combat-proven systems, and an export strategy constrained only by domestic capacity. The KF-21 track, the $35 billion defense-industry MoU, and the Tawazun–LIG manufacturing hub are the early architecture of the fit. And the exchange already runs both ways: interceptors in one direction, oil and capital in the other. This brief argues three things. The partnership's lasting value lies in its structural components—co-production, localization, sustainment, joint third-market expansion—not in mere transactions. The window for building those structural components is governed by three separate clocks, each already running and time-limited. And the obstacles—U.S. transfer control, the transition gap between immediate needs and delivery capacity, and entanglement exposure—are manageable, but only if managed deliberately: through Washington rather than around it, up a gated ladder rather than an open ramp, and with the risks written into the plan from

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the start.

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Introduction: Parallel Pressures on the UAE and ROK

Wars clarify. The Iran War of 2026 did not break the U.S. alliance system, and this brief does not argue that it did. What the war did was compress a decade of gradual change into four months, and make that change legible to two governments at once. The United States now allocates its military power selectively across theaters, rather than by standing presence. Its 2026 *National Defense Strategy* (NDS) says so plainly: allies are to carry their own defense first, with American support that remains critical but no longer comes without conditions.[3] For the United Arab Emirates and the Republic of Korea—two states bound to Washington by different histories, different threats, and the same doctrine—the war was the moment this shift stopped being a forecast and became an operating condition. This brief asks what two such allies can do about that shift, and what they can do for each other.

It is written from both ends of the problem. One author watched the war from Abu Dhabi, where interceptor stocks ran down at a rate whereby a broader and deeper set of suppliers would be preferable. The other watched from Seoul, where defense assets left the Peninsula for another theater. The two vantage points produce one conclusion: the most durable response to conditional protection is neither resentment nor substitution, but capacity that is built jointly, built to last, and built in a way that answers precisely what Washington has asked of its allies. The window for building that capacity is open, but it will not remain so. The sections that follow show what the war revealed, how each country is responding, where their responses meet, and what stands in the way.

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[3] U.S. Department of War, "2026 National Defense Strategy," U.S. Department of War (January 23, 2026), p. 19, https://media.defense.gov/2026/Jan/23/2003864773/-1/-1/0/2026-national-defense-strategy.pdf; P. Hegseth, "Remarks by Secretary of War Pete Hegseth at the 2026 Shangri-La Dialogue in Singapore (As Delivered)" (May 30, 2026), U.S. Department of War, https://www.war.gov/News/Speeches/Speech/Article/4504755/remarks-by-secretary-of-war-pete-hegseth-at-the-2026-shangri-la-dialogue-in-sin/.

What the war has revealed

For the UAE, despite having multiple security partners, the war clarified a single, central exposure: an over-reliance on the U.S. for its air-defense systems and the resupply of those systems. When Iranian missiles and drones struck in significant numbers, the war exposed two connected gaps. The systems the UAE fielded were heavily dependent on U.S. supply, and when interceptor stocks needed replenishing mid-conflict, the U.S.—with its own stockpiles overstretched across multiple theaters—could not deliver at the tempo the threat demanded. The UAE ultimately sourced emergency Cheongung-II interceptor resupplies from the ROK, reportedly drawn from Seoul's own operational reserves.[4]

This vulnerability was not created by the war, but is instead a feature of a defense posture that had significant exposure to a single supplier for the systems and the resupply on which the UAE's security depends. What the war did was make that reliance impossible to ignore, and it pointed to the obvious response: a more diverse set of suppliers, and, in the longer term, the capacity to produce more of this materiel at home.

For Korea, the war clarified a different dependency. The UAE's problem was supply. Korea's problem was presence. In March 2026, Patriot batteries reportedly left the Peninsula for the Middle East. Parts of the THAAD battery, per U.S. press reports, followed. Washington has neither confirmed nor denied the moves. They were notified, not negotiated—temporary redeployments require no consultation under alliance practice. Korea hosts one THAAD battery. There is no second.

The shield moved; the threat did not. The withdrawals came as North Korea's position was hardening on every axis: an alignment with Russia that has hollowed out the sanctions architecture, restored rail links with Beijing ahead of the May

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[4] S. Ahlawat, "UAE–South Korea Defense Pact Rumors Resurface as Seoul Rushes Interceptor Missiles from Its Own Reserve to Abu Dhabi," *The EurAsian Times* (2026), https://www.eurasiantimes.com/uae-south-korea-defense-pact-rumors-resurface-as-seoul-rushes-interceptor-missiles-from-its-own-reserve-to-abu-dhabi/; H. Joon, "South Korea Faces Export-Readiness Trade-Off amid Gulf Defense Push," Korea Pro (April 16, 2026), https://koreapro.org/2026/04/south-korea-faces-export-readiness-trade-off-amid-gulf-defense-push/?share=effe89c1 .

China–U.S. summit, and an undiminished weapons-test tempo. Seoul's official assessment was that deterrence remained intact. By measurable indicators, it did. But the war removed a comfortable ambiguity. Strategic flexibility had been a concept Koreans debated for twenty years. Now it was a logistics schedule: reported transport movements out of Korea could be followed on public flight-tracking websites.

What the war clarified, then, is not that the alliance is weakening. It is that the alliance has changed its unit of account: American power is now allocated globally, weighed against the needs of every theater, and the Peninsula holds no exemption. The 2026 NDS states this as policy, not as drift. For Seoul, the conclusion is the same one Abu Dhabi reached from the other direction: the portion of national defense a state provides for itself is the only portion whose availability it controls.

The structural commonality

Despite the very different threats the two states face, the 2026 U.S. NDS treats the Middle East and the Korean Peninsula as parallel cases—theaters in which U.S. allies are expected to take "primary responsibility" for their own defense with "critical but more limited U.S. support".[5] The UAE and the ROK are therefore not loosely similar cases, but instead occupy the same position in U.S. strategy. This is why the war clarified the same realities for both Abu Dhabi and Seoul—that they must build more of their own defense capacity rather than rely on the U.S. to supply it—and why, as the next section shows, their responses increasingly point toward each other.

How Each Country Is Adapting: Toward a Shared Foundation

Faced with what the war made clear, both the UAE and the ROK are already adapting. Their responses thus far do not simply run in parallel; they point toward each other.

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[5] U.S. Department of War, "2026 National Defense Strategy," U.S. Department of War (January 23, 2026), pp. 14, 18–20, https://media.defense.gov/2026/Jan/23/2003864773/-1/-1/0/2026-national-defense-strategy.pdf

UAE, broadening its suppliers, with Korea an emerging key tie

The UAE's response has been to accelerate a diversification of its defense suppliers that was already underway. Its purchasing spread between 2020 and 2024 was roughly 42% American, 17% French, and 11% Turkish.[6] The ROK element within this spread has emerged as increasingly critical.

Three developments over the war and during the immediate pre-war period show this. First, the war gave the relationship live proof in combat: the Korean-made Cheongung-II (KM-SAM) made its combat debut in UAE service against Iranian ballistic missiles and drones—reportedly intercepting 99% of ballistic missiles and 93.7% of drones—after which Seoul rushed emergency Cheongung-II resupply to Abu Dhabi, reportedly from the ROK's own reserves.[7] Second, the two states have been in talks over the KF-21 fighter program since the April 2025 Letter of Intent, a sign of movement toward genuine industrial partnership rather than mere off-the-shelf buying.[8] Third, and most significant, the February 2026 signing of a $65 billion package—a $35 billion defense-industry MoU explicitly meant to move "beyond a buyer-seller model", alongside a restructured $30 billion investment framework—turned the direction of the relationship into firm commitments.[9]

The pattern here matters: the parts of this relationship that count for most are those that build lasting industrial ties—co-production, sustainment, joint investment—rather than one-off purchases, because these hold across changes of government

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[6] M. George et al., "Trends in International Arms Transfers, 2024" (March 2025), p. 6, Stockholm International Peace Research Institute, https://www.sipri.org/sites/default/files/2025-03/fs_2503_at_2024_0.pdf

[7] UPI, "Defense Stocks Surge on Korean-Made Missile Defense System," UPI (June 5, 2026), https://www.upi.com/amp/Top_News/World-News/2026/06/05/defense-stocks-surge-korean-made-missile-defense-system/2261780697187/; S. Ahlawat, "UAE–South Korea Defense Pact Rumors Resurface as Seoul Rushes Interceptor Missiles from Its Own Reserve to Abu Dhabi," *The EurAsian Times* (2026), https://www.eurasiantimes.com/uae-south-korea-defense-pact-rumors-resurface-as-seoul-rushes-interceptor-missiles-from-its-own-reserve-to-abu-dhabi/.

[8] S. Choi, "South Korea Eyes $15 Billion UAE Arms Deal in Middle East Push," *Bloomberg* (November 19, 2025), https://www.bloomberg.com/news/articles/2025-11-19/south-korea-eyes-15-billion-uae-arms-deal-in-middle-east-push; F. Schiavi, "UAE–South Korea Defense Cooperation: The KF-21 Factor," Gulf International Forum (February 17, 2026), https://gulfif.org/uae-south-korea-defense-cooperation-the-kf-21-factor/

[9] UPI, "South Korea, UAE Finalize $35B Defense Cooperation Framework," UPI (February 27, 2026), https://www.upi.com/Top_News/World-News/2026/02/27/united-arab-emirates-defense-cooperation-projects/5111772174067/; E. Helou, "UAE, South Korea Seal $65 Billion Investment, Defense and AI Partnership," Economy Middle East (February 26, 2026), https://economymiddleeast.com/news/uae-south-korea-65-billion-defense-nuclear-deal-2026/.

and procurement cycles. And this deepening does not pull against the UAE's relationship with the U.S. It answers a request Washington itself has made.[10]

ROK, from arms exporter to security-industrial partner

Korea's adaptation begins from a different ground. Korea builds its own weapons; its dependency was never about supply. What the war unsettled in Seoul was the assumption of U.S. presence—and Korea's answer has been to convert an industrial strength it already had into a strategic instrument. Three moves show what that conversion looks like.

The first is proof. The Cheongung-II's combat record in UAE service did for the Korean defense industry what no exhibition could: it moved Korea from the category of seller to the category of provider whose systems hold under fire. When Abu Dhabi's interceptor stocks ran low mid-war, Seoul reportedly released missiles from its own operational reserve. That decision carried a cost at home—a country postured against North Korea does not draw down its reserve lightly—and precisely for that reason, it carried weight abroad. It was not a mere transaction; it was a signal of how much the relationship now weighs in Seoul.

The second is tempo. The KF-21's first production aircraft rolled out in March 2026, and the type enters service in September. The program now anchors a defense-export strategy that the Lee Jae-Myung government has made explicit national policy—the stated ambition of becoming one of the world's four largest defense exporters—and that the war has accelerated rather than created. Korean industry's constraint is no longer demand but capacity—which is exactly the constraint the UAE is positioned to relieve.

The third is statecraft. Within a single quarter, Seoul's diplomatic outreach to the UAE delivered a $65 billion package in February and 24 million barrels of emergency

[10] U.S. Department of War, "2026 National Defense Strategy," U.S. Department of War, (January 23, 2026), pp. 13, 19–21, https://media.defense.gov/2026/Jan/23/2003864773/-1/-1/0/2026-national-defense-strategy.pdf; P. Hegseth, "Remarks at the 2026 Shangri-La Dialogue" (May 30, 2026), U.S. Department of War, https://www.war.gov/News/Speeches/Speech/Article/4504755/remarks-by-secretary-of-war-pete-hegseth-at-the-2026-shangri-la-dialogue-in-sin/.

crude in March.[11] Defense and energy now run through the same channel, in both directions. This is the operational meaning of the ROK–UAE Special Strategic Partnership framework: a mechanism that can move interceptors one way and oil the other.

None of this pulls Korea away from its U.S. alliance. The 2026 U.S. NDS asks allies to carry more of their own weight and integrate with one another: Korea's Middle East engagement does both, and does them visibly. The tension Seoul must manage is real—between alliance obligations and independent strategic capacity—but the war has narrowed the distance between the two. Under Washington's current doctrine, building capacity is the obligation.

The ROK–UAE Bilateral Opportunity: Complementarity and Convergence

The complementarity is real, reciprocal, and easily stated. Korea's defense industry runs on scale: a large standing army buying at volume drives unit costs below what most European and some American producers can match. That engine has made Korea the world's tenth-largest arms exporter, with exports projected to rise from $15.4 billion in 2025 to $27 billion in 2026.[12] And exports are where Korea's strategy points, since domestic Korean contracts cap profit margins at only a few percent. The UAE is the world's eleventh-largest arms importer, and is diversifying its procurement, with capital to invest and a declared ambition to progress its indigenous defense production beyond missiles, autonomous systems, and land platforms to include fighter jet production.

But the ledger is not seller-meets-buyer. For Korea, the UAE offers what no domestic investment can: production capacity extended without capital risk at home, an anchor market in the Gulf, and combat data from its own systems in live use—feedback that flows into the platforms Korea fields against the North. Each side thus

[11] D. Ji, "Korea, UAE Agree to Pursue $65b in Joint Projects: Cheong Wa Dae," *The Korea Herald* (February 26, 2026), https://www.koreaherald.com/article/10683405; "UAE로부터 원유 총 2400만 배럴 긴급 도입…일일소비량 8배 규모" [Republic of Korea to Import 24 Million Barrels of Crude from the UAE on an Emergency Basis], *Korea Policy Briefing* (March 18, 2026), https://www.korea.kr/news/policyNewsView.do?newsId=148961046 (in Korean).
[12] H. Lee, "Korea's Defense Exports Hit $15.4 Billion in 2025, Set to Grow Further," *Seoul Economic Daily* (March 25, 2026), https://en.sedaily.com/politics/2026/03/24/koreas-defense-exports-hit-154b-in-2025-set-to-grow-further.

holds what the other lacks.

Not all of this complementarity will last, however. Wartime interceptor resupply signaled depth in the partnership, but sales are revocable; procurement patterns shift, as the UAE's diversification history shows. The path to consolidating the durability of this complementarity thus lies in strengthening and furthering its three structural components:

1) The KF-21 track, under discussion since the April 2025 Letter of Intent, which spans possible assembly in the UAE, joint development of future variants, and co-export.
2) The $35 billion defense-industry MoU of early 2026, which commits both sides to co-design, co-development, joint training, and co-sustainment across air defense, airpower, and maritime systems—in its own words, to move beyond a buyer-seller dynamic.
3) The restructured $30 billion UAE–ROK investment framework, which directs Korean industrial entry into the UAE and joint expansion into third markets.

Deepening means converting these components from paper to reality. The ROK–UAE Special Strategic Partnership supplies the foundation, while frameworks such as the May 2026 MoU between the UAE's Tawazun Council and the ROK's LIG Defense and Aerospace—establishing a locally incorporated manufacturing hub in Abu Dhabi for joint R&D, production, maintenance, and supply-chain integration[13]—illustrate the approach. Three vectors to act on this are apparent.

1) Move the KF-21 relationship toward industrial participation: final assembly, subsystem production, and MRO (maintenance, repair and overhaul) in the UAE in the near term, with co-development of future variants as trust and approvals mature. Cooperation of this nature over such flagship and politically significant military hardware locks both sides in.
2) Build in-UAE MRO and localized production of existing Korean systems. This

[13] D. Gokulan, "UAE signs deal to build global defence manufacturing hub in Abu Dhabi," *Gulf News* (May 5, 2026), https://gulfnews.com/business/markets/uae-signs-deal-to-build-global-defence-manufacturing-hub-in-abu-dhabi-1.500529928.

diversifies the relationship and extends Korean capacity precisely where domestic strain would otherwise restrict it.

3) Co-export from the UAE base into third markets, pairing Korean product with Emirati logistics and position—subject, at every step, to ROK re-transfer consent and end-use safeguards for Korean-origin technology. Such interdependence—new export markets being crucial both to the UAE's defense-industrial ambitions and to the expansion of Korea's—feeds itself.

The window for capitalizing on this complementarity is defined by three time-bound dynamics. The first is the present moment in which both parties recognize a mutual, linked problem. The second is the present interlock between Korea's capacity strain and the Gulf's procurement urgency. The third is the current ROK–UAE political alignment—driven by the war, shifting U.S. force-allocation, Hormuz-driven revenue pressure, and Seoul's export drive—which is at an unprecedented level but is not yet a new status quo. Each new partner the UAE's defense-localization drive takes on dilutes the incentive for deep strategic commitment to any one partner.

None of the above steps will strain either state's alliance with the U.S. Indeed, they answer Washington's own demands. The 2026 U.S. NDS identifies a simultaneity problem in the U.S. industrial base—namely, that America's defense-industrial base cannot supply all U.S. allies at once—calls on allies to integrate more closely with one another, and offers model allies expedited transfers and deeper collaboration in return. Every increment of ROK–UAE capacity is thus demand lifted from an overstrained American base—and relief, in the same move, for Korea's production bottleneck and the UAE's industrial gap. The ROK–UAE partnership therefore makes both states more independent and more valuable to their U.S. ally at once.

Challenges and Next Steps

Three obstacles stand in the way of the three vectors above. None is insurmountable, but all are on the clock.

The first is U.S. technology-transfer control. The KF-21 flies on the GE F414 engine—

built under license by Hanwha Aerospace, but using core technology owned by General Electric—which places every export under U.S. International Traffic in Arms Regulations (ITAR) approval. This obstacle is not hypothetical: Washington has reportedly restricted KF-21 exports to the UAE before, and has reportedly used the same lever elsewhere for commercial ends, as when Saab's F414-powered Gripen was blocked from Colombia.[14] Korea's program to develop an indigenous replacement for the F414 may eventually reduce this constraint, but a recent industry assessment suggests that an operational alternative may not be available before the late 2030s—well beyond the present convergence of Gulf procurement urgency, Korean capacity constraints, and bilateral political alignment. The route therefore runs through Washington, not around it. Here, the model-ally mechanism outlined by Washington provides the opening. If the ROK–UAE partnership is framed as delivery on the U.S. NDS's own regional-integration demand, and backed with credible end-use guarantees, security protocols, and transparency on any co-production involving the F414, then the case for U.S. approval becomes compelling: three allies executing Washington's strategy, with GE collecting a share of the engine sales.

The second obstacle is sequencing. In-UAE co-production takes years to stand up, but Korea's capacity strain and the Gulf's procurement urgency are immediate. The answer is a phased ladder: MRO of Korean systems in the UAE first, then assembly of major sub-sections, then subsystem manufacture, then co-production and co-development. Each rung builds Emirati capability while lifting the load from Korean plants. Two limits apply throughout. First, the UAE's near-term delivery priority can only be met within Korea's existing delivery schedules—Seoul drew down its own operational reserve once as an emergency measure and cannot promise to repeat that as a standing policy. Second, advancing up each rung of the ladder requires its own approvals—end-use guarantees, re-transfer consent, and security protocols—since Seoul's transfer policy is deliberately selective, shaped by technology-protection constraints, rather than an open ramp.

[14] Army Recognition, "UK Tries to Help South Korea Avoid US Veto on KF-21 Export by Replacing F414 Engine with British One," Army Recognition (June 25, 2025), https://www.armyrecognition.com/archives/archives-aerospace-defense/defense-news-aerospace-2025/uk-tries-to-help-south-korea-avoid-us-veto-on-kf-21-export-by-replacing-f414-engine-with-british-one

The third obstacle is entanglement. Iran's repeated closures of the Strait of Hormuz stranded Korean-flagged vessels among other shipping, and Korean analysts read Tehran's posture as partly an answer to Korea's Gulf defense sales.[15] ROK–UAE deepening thus raises each partner's exposure to the other's adversaries—for Korea, at sea in the Gulf, and for its nationals and forces in the region. This risk does not undermine the argument for the partnership, but it does require planning with clear eyes: entanglement management belongs inside the architecture from the start.

In compressed form, the case of this brief is as follows. The war revealed the full potential of a synergy that was already there—one country's industrial depth aligned with the other's capital, urgency, and geography—and that synergy will outlast the conflict that exposed it. What will not outlast the conflict is the moment for acting on it. Political alignment fades, the energy for capitalizing on the complementarity erodes as the UAE adds partners, and Korea's currently unprecedented capacity constraints generate an incentive for industrial partnership that will lessen in intensity. The work, then, lies in building past the revocable components of the partnership to establish the structural ones while time-bound opportunities still permit: co-production over purchases; localization and MRO under Korea's transfer gates; and co-export into third markets with consent built in. None of this asks either country to choose between the partnership and its U.S. alliance. It merely asks them to become what Washington has said it wants—allies who carry their own weight, together. The war showed both governments the same lesson at the same time. That coincidence is the opportunity. It will likely not repeat.

The views and opinions expressed in this report are those of the author(s) and do not necessarily reflect the official position of INSS.

[15] J. Hwang, "Just 3 of 26 S. Korean-operated vessels still stuck in gulf," *The Korea Herald* (June 28, 2026), https://www.koreaherald.com/article/10790440; G. Yun, "Three Korean Ships and 43 Korean Seafarers Stranded Again by U.S.-Iran Clashes," The Kyunghyang Shinmun (English edition, June 28, 2026), https://www.khan.co.kr/en/article/202606281118007/