INSTITUT PRO POLITIKU A SPOLEČNOST

POLICY BRIEF

February 2025

Geopolitical Tensions and Ukrainian Post-war Recovery

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Summary

The modern world is navigating complex challenges that intertwine security and economic development. North Korea's growing military capabilities, nuclear ambitions, and support for Russia in the Ukraine conflict are reshaping regional and global dynamics, intensifying tensions in East Asia and complicating alliances. Meanwhile, Ukraine's post-war reconstruction presents an opportunity to rebuild a resilient economy with international support, focusing on governance reforms and infrastructure. These parallel developments underscore the shifting global balance of power and the interplay between security risks and economic recovery. Understanding North Korea's strategic goals and Ukraine's path to recovery offers insights into the evolving geopolitical landscape and opportunities to foster stability and progress.

Key Takeaways

- Russia’s war in Ukraine has escalated into a global issue with North Korea supplying weapons and troops, deepening geopolitical tensions.
- Seoul has the potential to influence the war by providing advanced military technology and strengthening international alliances.
- South Korea's involvement could boost its global standing and reshape regional security.
- Ukraine’s recovery offers economic opportunities, with South Korea well-positioned to contribute.

Origins of conflict in eastern Ukraine and South Korean perspective

"The conflict in eastern Ukraine has become global." A thesis that would have seemed like an exaggeration a year ago is now a reality at the beginning of 2025. This is not only due to Russia's geographical position, which extends across a large part of Eurasia, but it touches directly on the nature and origin of the bloodiest war in Europe since World War II. The conflict arose primarily to restore the position of the Soviet empire before its collapse in 1992, and after Moldova and Georgia -Ukraine was next in line.

From a broader perspective, the Russo-Ukrainian War can be understood as the final act of the Cold War history, which has its origins in the revolutionary events of Tsarist Russia, culminated in the 1950s in Korea (Stalin's support of Kim Il Sung's leadership during the Korean War) and then slowly withered until the events of 1989 in Europe and the subsequent collapse of the Soviet Union at the end of 1992. However, the collapse of the Soviet Union did not mean the end of Soviet imperialism. The collapse and the loss of Russian dominance were understood even by Russian democratic politicians as only temporary. The first and second wars in Chechnya during Boris Yeltsin's presidency only foreshadowed what Vladimir Putin is now trying to do during his 25-year rule.

Not merely the annexation of Donbas and Crimea or the protection of oppressed Russians in territories outside the Russian Federation itself, but the restoration of Soviet greatness by former secret agents of the Soviet Union, the reversal of geopolitical developments in Europe and Asia since 1989, and the spread of anti-democratic and anti-liberal authoritarianism - these are the true goals of the current Russian leadership, which they have been working on for decades.

This is also related to the distribution of forces in this conflict, especially on the side of the "bad guys". The Soviets were at the origins of both the People's Republic of China (1949) and the Democratic People's Republic of Korea (1948), so it is not surprising that both countries support their original founder against Ukraine and its supporters, although each in different ways.

China has backed Putin's claim that Russia launched its assault against Ukraine in 2022 because of Western provocations, even as Beijing has tried to maintain at least the perception of neutrality. In between, China has been accused of powering Russia's war machine with substantial amounts of "dual use" goods like microelectronics and machine tools. Chinese leader Xi Jinping has repeatedly emphasized strategic cooperation with Russia as part of a "no-limits" partnership and that in 2023 delivered a record $240 billion in bilateral trade (Week, 2004).

Due to a completely different economic strategy, North Korean leadership could not help its founder with advanced technologies and purchases of raw materials like the Chinese communists, so Kim Jong Un helped first with weapons supplies and then with combat units. From August 2023 to October 2024, Pyongyang was to deliver approximately 20,000 containers, of which 80-95% of the shipment consisted of ammunition, primarily 152mm and 122mm artillery shells in an estimated number of approximately 6 million pieces, with the remaining 5-20% comprising other forms of weaponry such as portable surface-to-air missiles, rifles, rocket launchers, and mortars (Guseinova, 2024: 11-14). According to reports from the US Department of Defense, allegedly about 10,000 North Korean soldiers had arrived in the contested border region of Kursk by the end of October 2024 (US Department of Defense, 2024).

It is the direct entry of North Korean soldiers into the European battlefield that makes the Russian-Ukrainian war a globalized conflict. It is no longer about some half-hidden and unacknowledged economic aid as in the case of China. Events in Ukraine thus directly affect South Korea thousands of kilometers away.

The enemy of an enemy is a friend

Contemporary South Korea (ROK) is a unique example of how economic development and market forces can have a huge impact on a nation's position in world trade and politics. Looking at South Korea's recent history, few would have expected the economic success it has enjoyed, with Korean companies dominating a wide range of manufacturing sectors from heavy machinery and weapons to electronics and the entertainment industries.

South Korea is de facto only half of a nation that suffered from the occupation of imperial Japan for almost the entire first half of the 20th century. After the end of World War II, however, peace was replaced by a cruel war that spilled from the South to the North and vice versa, and the country became a place of global conflict between the East and the West. Even the stabilization of South Korea at the 38th parallel after the armistice in 1953 did not mean prosperity, but rather a problematic survival with an unpredictable relative strongly supported by the Soviet Union and communist China. Even at the end of the 1970s, when South Korea was ruled by corrupt military juntas, it did not look like a great success.

Four decades later, here we have a hypermodern state with an exceptional export economy and a country that surpasses Japan's per capita GDP in 2022 and 2023 (Sato, 2024). And it is the exceptional economic success and the development of the war in Ukraine (the involvement of North Koreans directly in the fighting) that are also changing South Korea’s global role and responsibility. ROK has a unique experience with the North Korean regime, and the South Korean secret services and government have the best overview of what North Korea is capable of, what it needs most, and what is behind Russia's elaborate production of new combat units from foreign nationals. South Korea is now at a crossroads as to whether the country will play as important a role in international politics as it does in international trade. And this unique opportunity for Seoul is located exactly 7,300 kilometers to the east - in Ukraine.

Seoul intervention

If Seoul chooses to throw its full-throated support behind Ukraine, South Korean support could turn the tide on the entire conflict and even lead directly to a peace deal. While European and U.S. allies have limited capacity for armament production critically needed in a protracted ground battle such as in Ukraine, South Korea's world-class companies have continued to develop, perfect, and produce exactly the weaponry needed in an ongoing industrial war. Now, South Korean companies are world leaders in producing military vehicles, ammunition, automated artillery, and other defense equipment that Ukraine desperately needs (Haggard, 2024).

The current situation is a huge opportunity for Korea to join the ranks of the most important global players and strengthen its position. Last year, South Korea was not invited to the G7+ summit set for June in Italy[1]. The country also failed the World Expo Bid in late 2023 (Global Times, 2024). The cooperation between Pyongyang and Moscow is thus a direct challenge for Seoul. The anti-communist and anti-Soviet appeal would have a strong impact on South Koreans, and focusing on helping the attacked country, while also learning from their own experiences with aggressive Soviet regimes, could reunify South Korean society and thus help overcome the current internal political crisis that we have been detecting in South Korea for a whole decade (since the sinking of the Sewol ferry).

[1] Moon Jae-in, former president of South Korea was invited to the G7 summits in 2020 and 2021. In May 2023 Yoon was invited to join the summit in Hiroshima, Japan (Global Times, 2024).

To emerge from the role of a middle power with enormous economic potential among world powers is not an easy task, especially with North Korea and communist China at their backs. But during its history the South Koreans have shown that unfavorable circumstances often do not apply to them. South Korea's involvement in the conflict in Ukraine will certainly cost a lot of resources and human capacity, but the potential benefits of this decision can positively affect the future of South Korea which may currently seem uncertain.

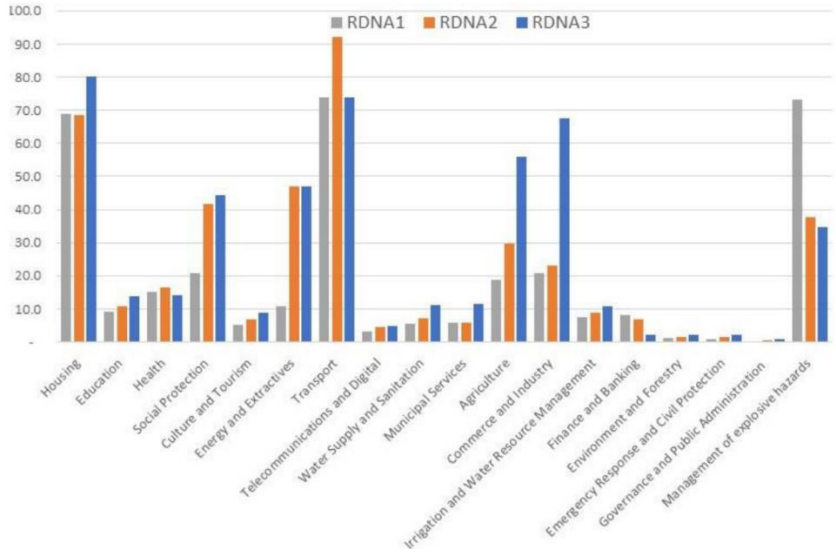
Opportunities and threats

South Korea does not need direct involvement in the conflict. It can play the role of a supplier of important technologies and an important ally on the international stage. However, the ROK should keep in mind that if Putin's Russia fails in Ukraine, it could ultimately positively affect relations between the ROK and the DPRK. A weakened Russia also means a weaker North Korean regime, since they are based on the same political-ideological construct of an infallible leader who can do everything but is also responsible for everything.

If South Korea's involvement in the conflict means a positive change in the development of the conflict in Eastern Ukraine, then relations not only with Ukraine, but with the entire Eastern and Northern flank of NATO would certainly improve. This is because the states of the former Eastern bloc are very aware of the extent of the Kremlin's efforts to revise the post-Cold War order in Europe. The threat of Soviet imperialism may have receded somewhat for Czechs, Poles, Hungarians, Romanians, Bulgarians, Slovaks, Lithuanians, Latvians and Estonians, but it has never ceased to exist. This is a strong sentiment that may not be very noticeable in the Far East.

The ROK also has an important role to play in the post-war period and in the expected reconstruction process. Post-war reconstruction and recovery in Ukraine are projected to cost $486 billion over the next decade (RDNA3), up from $411 billion estimated a year ago (RDNA2). Housing is the highest need, or 17 per cent of the overall estimated costs, followed by transport, commerce and industry, agriculture, and energy, so all the areas in which South Korean companies are leading. Social protection and livelihood support, as well as explosive hazard management, are pegged at under 10 per cent, respectively (RDNA3: 39-40).

Figure 1: Comparison of needs of Ukraine in RDNA1, RDNA2, and RDNA3 (in billion US$)



Source: RDNA3: 39-40

If Korea and Korean companies play a pivotal role in catalyzing a peaceful solution or sustainable long-term ceasefire, the future participation of Korean companies in the half-trillion-dollar task of rebuilding Ukraine would not only be assured, but it could also smooth the path for Korean companies to establish a significant presence in Ukraine, a country linked to the European Union, the largest market in the world (Haggard, 2024). The South Korean economic miracle can happen once again, but now the Koreans can be in the position of investors and technology suppliers.

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