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EDITORIAL ANALYSIS

More Than Trade: India Must Deepen the South Korea Partnership Into a Genuine Strategic Alliance

THE HINDU

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CURATED & WRITTEN BY

**Bharat Choudhary**

UPSC Educator & Content Creator

[linkedin.com/in/epicbharat](https://www.linkedin.com/in/epicbharat)

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 The Hindu

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GS2

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INTERVIEW ANGLE

"South Korean President Lee Jae Myung's state visit to India (April 19-21, 2026) is the highest-level bilateral diplomatic engagement in recent years. The Hindu argues that while India-South Korea relations have grown steadily since the Special Strategic Partnership designation of 2015, the relationship remains underutilised — particularly in defence co-production, semiconductor supply chains, and maritime cooperation. With both countries facing shared strategic concerns about supply chain concentration and regional instability, this visit must convert a partnership on paper into operational depth. Should India prioritise economic integration or security cooperation with South Korea?"

EDITORIAL SUMMARY

The Hindu argues that India's Special Strategic Partnership with South Korea remains under-operationalised despite a decade of diplomatic goodwill. Lee Jae Myung's visit must yield concrete outcomes: binding semiconductor investment framework, CEPA services upgrade, defence joint-production pilot, and maritime cooperation agreement. Without operational depth, the partnership risks being diplomatic symbolism without strategic content.

INDIA–SOUTH KOREA: THE PARTNERSHIP SCORECARD

DIMENSION	CURRENT STATUS	GAP
Bilateral trade	~USD 22-25 billion	India runs trade deficit; CEPA under review
Semiconductor cooperation	MoU-level discussions	No binding investment framework
Defence cooperation	K9 howitzers inducted; K2, FA-50 under evaluation	No joint production agreement
Maritime cooperation	Ad hoc naval exercises	No institutionalised framework
People-to-people	Korean community ~10,000 in India	Limited academic/cultural exchange

KEY FACTS

- **Special Strategic Partnership:** Established 2015 — India-South Korea’s highest diplomatic designation
- **CEPA 2010:** India’s first FTA with an East Asian country; CEPA review initiated 2023
- **India Semiconductor Mission:** ₹76,000 crore outlay approved 2023; Samsung and SK Hynix are natural partners
- **South Korean FDI in India:** Cumulative >USD 5 billion; Samsung, Hyundai, Kia, LG are major investors
- **Bilateral trade target:** USD 50 billion by 2030 (stated during visit)

UPSC RELEVANCE

PAPER	ANGLE
GS2 — IR	Special Strategic Partnership, CEPA, Act East Policy, New Southern Policy
GS2 — IR	Indo-Pacific strategy, supply chain diversification, technology diplomacy
GS3 — Economy	Semiconductor supply chains, India Semiconductor Mission, FDI
GS3 — Security	Make in India defence, K-defence exports, joint production
Mains Keywords	Act East Policy, Special Strategic Partnership, CEPA 2010, India Semiconductor Mission, K9 Thunder, Make in India defence, New Southern Policy, Indo-Pacific, supply chain diversification

● KEY ARGUMENTS AT A GLANCE

India's Special Strategic Partnership with South Korea — established in 2015 — remains under-institutionalised and economically asymmetric despite a decade of diplomatic goodwill; President Lee Jae Myung's April 2026 visit is the opportunity to close this gap by operationalising semiconductor technology transfer, defence co-production under Make in India, and a maritime cooperation framework — elevating the relationship from a trade agreement to a genuinely strategic partnership capable of reshaping Indo- Pacific supply chains in India's favour.

✓ SUPPORTING

- The semiconductor imperative:** South Korea — home to Samsung and SK Hynix — controls ~45% of global DRAM and ~70% of NAND flash memory production. India's Semiconductor Mission (₹76,000 crore outlay, approved 2023) needs technology partners willing to invest in India's ecosystem, not merely sell finished chips. South Korean chipmakers offer India a Taiwan- alternative that is politically aligned, strategically acceptable, and technologically at the frontier. The visit is an opportunity to convert the semiconductor MoU into a binding investment framework with technology transfer commitments — not just a letter of intent.

- **The CEPA asymmetry problem:** India's 2010 CEPA with South Korea has produced a persistent trade deficit for India — India imported far more from South Korea than it exported. The CEPA review (initiated 2023) must expand Indian market access in IT services, pharmaceuticals, and digital products — sectors where India has comparative advantage.

The **\$50 billion bilateral trade target by 2030** cannot be reached on the current imbalanced template; structural reform is needed.

- **The defence cooperation gap:** South Korea's defence exports — K9 Thunder howitzers (India has already inducted these for the Army), K2 Black Panther tanks, FA-50 light combat aircraft — offer India advanced, battle-tested hardware at competitive prices. More importantly, South Korea's willingness to consider joint production and technology transfer aligns with India's Make in India defence goals.

The visit must yield a concrete joint production framework, not just MoU-level expressions of intent.

- **The Indo-Pacific convergence:** Both India and South Korea face shared concerns: maritime security in the Indo-Pacific, North Korean proliferation, and over-dependence on China in supply chains. India's Act East Policy and South Korea's New Southern Policy (which explicitly prioritises ASEAN and India) are complementary frameworks.

The missing element is institutionalised defence and intelligence dialogue — which neither country has yet formalised despite common strategic ground.

COUNTER

South Korea has historically prioritised its US alliance and China economic relationship over deepening with India. Under progressive President Lee Jae Myung (Democratic Party), South Korea may be more focused on domestic economic recovery and re-engaging with North Korea than on deepening Indo-Pacific strategic alignments.

India's bureaucratic processes for technology import and defence procurement are notoriously slow, which has frustrated potential Korean partners. The CEPA deficit reflects structural supply chain realities — Korean electronics and automobiles are simply more competitive than their Indian equivalents — which no diplomatic visit can easily change.

WAY FORWARD

Five-pillar deepening: (1) **Semiconductor investment agreement** — binding framework (not MoU) committing South Korean chipmakers to India Semiconductor Mission with technology transfer thresholds, not just financial investment; (2) **CEPA services expansion** — accelerate CEPA review to include Indian IT, pharma, and professional services access to Korean market; (3) **Defence joint production** — single specific platform (K9 howitzer successor or FA-50 derivative) as pilot for Make in India + South Korea technology

partnership; (4) **Maritime cooperation framework** — Indian Navy + South Korean Navy bilateral exercise and information-sharing agreement for Indo-Pacific; (5) **People-to-people depth** — scholarship exchanges, Hangul in Indian universities, Hindi in Korean universities — converting economic ties into civilisational familiarity.

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MAINS ANSWER FRAMEWORK

QUESTION

India and South Korea elevated their relationship to a Special Strategic Partnership in 2015. Despite this designation, the partnership has been described as underperforming relative to its potential. Critically examine the areas of convergence and the structural barriers to deepening India-South Korea strategic engagement. (250 words)

INTRODUCTION

India and South Korea established their **Special Strategic Partnership** in 2015 — the highest diplomatic designation the two countries share. Bilateral trade stands at ~USD 22-25 billion annually, and South Korean companies (Samsung, Hyundai, Kia, LG, POSCO) are significant investors in India's manufacturing sector.

Yet the partnership has been characterised by diplomatic goodwill without operational depth — a gap that President Lee Jae Myung's April 2026 visit must begin to close.

BODY

Areas of strategic convergence: India and South Korea share concerns about Indo-Pacific maritime security, supply chain diversification away from China, and technology sovereignty. South Korea's Semiconductor Mission and India's Semiconductor Mission are natural complements — Seoul has the technology, India has the market scale and strategic need.

South Korea's **K-defence ecosystem** (K9 Thunder already inducted by India) is a proven supply chain for India's defence modernisation. Both countries face the challenge of managing the US alliance while maintaining economic flexibility. **Structural barriers:** India's **persistent trade deficit with South Korea** under the 2010 CEPA reflects competitiveness gaps in manufacturing — Korean electronics, displays, and automobiles dominate because they are genuinely better-designed and manufactured at scale. This structural reality limits trade balance without industrial deepening. India's **defence procurement bureaucracy** has historically slowed even promising partnerships — the FA-50 evaluation has been

running for years without conclusion.

South Korea's progressive government may deprioritise Indo-Pacific security frameworks in favour of inter-Korean engagement. **The semiconductor opportunity:** India's Semiconductor Mission (₹76,000 crore) needs Samsung and SK Hynix as partners willing to invest in India, not merely sell to it. The Taiwan concentration risk — highlighted by US-China tensions over the Taiwan Strait — creates political incentive for both countries to diversify production. **The CEPA gap:** The 2010 CEPA needs a services chapter upgrade to allow Indian IT, pharmaceuticals, and digital services meaningful Korean market access — currently lacking despite the framework's existence. **Act East and New Southern Policy convergence:** India's Act East Policy and South Korea's New Southern Policy (prioritising India and ASEAN) are complementary frameworks that need institutionalised mechanisms — not just bilateral summits — to realise their potential.

CONCLUSION

India-South Korea relations have the diplomatic architecture for a genuine strategic partnership but lack operational depth. The Lee Jae Myung visit must yield concrete outcomes: a binding semiconductor investment framework, a CEPA services chapter, a defence joint-production pilot, and a maritime cooperation agreement.

Without these, the Special Strategic Partnership risks remaining a designation without content — a missed opportunity in an Indo-Pacific moment that rewards those who build real partnerships.

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Bharat Choudhary

UPSC Educator & Content Creator

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