



## ***THE VIEW FROM KOREA: THE US AND IRAN NEGOTIATE, AS KING PYRRHUS WATCHES CAREFULLY***

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The United States and Israel's combined military operations against Iran are currently in a two-week ceasefire. As the world's economies nervously await the results of negotiations, the Republic of Korea already faces ramifications and implications that demand attention. Operation Epic Fury and Iran's closure of the Strait of Hormuz to [most traffic](#) created global political, energy, and financial crises. Perhaps nowhere has that been so acutely felt as in South Korea.

### **Political**

These crises create foreign and domestic policy conundrums in Korea. Internationally, Korea finds itself in a classic [alliance security dilemma](#) in which it tries to avoid abandonment and entrapment. South Korea does not want to be dragged into a military conflict that is unpopular at home and that would compromise strategic focus on national defense. There has been no official request to send troops from Washington yet, but doing so faces significant domestic political risks. Recent [polling data](#) indicates that 61% of Koreans oppose sending troops and 63% [believe](#) operations are excessive. Nonetheless, if Korea does not provide adequate support, it risks being on the receiving end of President Trump's zero-sum transactionalism, which could materialize in the form of increased tariffs or troop withdrawals

from the peninsula. If Washington insists, the cost of abandonment is likely higher than the cost of entrapment, but there are local elections in June in Korea, so navigating this delicate balance will be problematic.

Domestically, re-allocating resources impedes President Lee's policy agenda. Lee's pre-war [domestic goals](#) focused on economic growth, an inclusive growth agenda, and transitioning to renewable energy—once complimentary goals that are now in competition. Economic growth, necessary for funding inclusivity, requires an abundance of affordable energy for Korea's energy-intensive tech manufacturing and heavy industries that bolster it. Price shocks and fear of supply shortages require large-scale short-term government intervention to cushion the shock. Problematically, funds used for energy subsidies to offset price shocks are then unavailable for inclusive growth policies such as housing subsidies and welfare spending. Lastly, to compensate for potential energy shortages and high costs, Korea [lifted limits](#) on coal-fired power generation and raised nuclear power use, thus punting his long-held desire to transition to a greener energy mix. Notably, these challenges to implementing Lee's domestic agenda are all linked to Korea's energy supply vulnerability.

### **Energy and financial**

The conflict exposed South Korea's decades-old overdependence on the Strait of Hormuz for its economic well-being. Korea imports 84% of its [total energy supply](#), 37% of which is crude oil, and 70% of that crude oil transits through the strait. Additionally, 65% of its helium and 35% of its naphtha, essential components of its semiconductor and petrochemical industries, [follow the same route](#). President Lee has proactively mobilized his government to mitigate the reverberations of this supply shock, but [a lot of damage](#) had already been done. In the first two trading days after kinetic operations began, the KOSPI stock index fell over 18%, wiping out \$553 billion in two days, and has suffered through high volatility ever since. Semiconductor manufacturing [relies on helium](#) for clean cooling, leak detection, and inert shielding; and the two leading semiconductor manufacturers, SK Hynix and Samsung Electronics, [account for 40%](#) of the KOSPI market capitalization. In short, South Korea left the engine powering its economy

susceptible to a geographically vulnerable chokepoint, thus accentuating the direct impact of its energy security on economic growth. This is a decades-old problem for South Korea, and diversifying supply sources and securing supply chains should be of the utmost importance, but this raises the question that is reverberating in Korea: “How important were its allies’ interests in the US decision to engage in Operation Epic Fury?”

### **A strained relationship in the bigger context**

The US decision to act militarily without consulting its allies, the ensuing economic repercussions, and the request for allied support created challenges for the US and its alliances around the globe. For South Korea, this was the latest in a string of decisions by the US that have disappointed them and, at times, implied indifference to its interests. Under President Trump, transactionalism, rather than a shared history or the alliance, is ostensibly the organizing principal in the relationship. For example, President Trump’s decision to withdraw from the JCPOA in 2018 was economically and politically [damaging for Korea](#). The 2025 [immigration raid](#) on Hyundai’s plant in Georgia saw more than 300 Korean nationals, mostly high-skilled workers whom the president eventually said were there legally, detained and treated in a manner unacceptable among allies. Additionally, the tariffs imposed in 2025 were extremely unpopular in South Korea and considered coercive.

In January 2026, President Trump threatened to impose 25% tariffs, citing frustration in the delay of the \$350 billion agreed to in the previous year’s negotiation. This prompted the Korean legislature to pass a \$350 billion investment bill on March 12, just under two weeks after the day of disaster at the KOSPI, in which \$553 billion vanished from the market. Most people understood that this was the implementation of a previously negotiated agreement, but the timing of the legislation complicated its palatability. These decisions create fertile ground for foreign and domestic detractors to use wedge tactics and exploit the alliance’s asymmetry.

### **Conclusion**

To be clear, the US-ROK alliance is strong, maintains high approval ratings among the public, and realpolitik dictates that it will remain so for the foreseeable future as the US is the only nation currently capable of being a security guarantor for South Korea. However, the most constant thing in life is change, and recent polling data indicates that the US has a public relations problem in South Korea. In an annual survey conducted by the Korea Research Company in October 2025, there was a sharp increase in negative perceptions of the US from the previous year. For example, there were [double-digit increases](#) in perception that the US is “authoritarian,” “a threat,” “dishonest,” “oppressive,” and “irresponsible.” Likewise, in a [Pew Research poll](#) from June 2025, the US’ favorability in South Korea dropped by 16 percentage points from 2024. It is difficult to ascertain whether this is a current administration-induced temporary fluctuation in public perception, or if there is a bigger shift underway, but the US leadership’s manner of communication with the world during Operation Epic Fury has not helped the trends observed in the polling from 2025. In fact, 61% of Koreans [believe](#) the conflict in Iran is unjustified and 81% prefer that their government maintain public neutrality. This data, along with several op-eds and thanks to conversations with a variety of people in Seoul, makes this researcher question if these are signs of

alliance fatigue manifesting itself at the societal level. In doing so, one can’t help but be reminded of Hemingway’s *The Sun Also Rises*. In it, the character Mike Cambell is asked how he went bankrupt, to which he responds, “Two ways...Gradually, then suddenly.” If the US continues in its current trajectory, the risk of trust in the alliance gradually degrading until it is no longer effective increases. The US-ROK alliance is deeply institutionalized and robust, but the US leadership could consider appropriately acclimating its engagement with global audiences because trust and loyalty are much easier to lose than they are to gain back. Additionally, the US leadership should eliminate hyperbolic messaging and recognize that these governments have voters who demand clarity and a persuasive argument if they are to send their young people in harm’s way in the name of an alliance. To maintain a stable and prosperous Indo-Pacific, the US needs allies, but must acknowledge the changing role of middle powers in this era of great power rivalry. Middle powers have increased agency and will likely use it when they can.

When King Pyrrhus of Epirus defeated the Romans in the initial battles of their campaign against the Greeks in the 3rd century BCE, he did so to the detriment of his comprehensive strategic objectives. By comparison, the United States military has performed exceptionally in Operation Epic Fury, but the absence of consultation, a precisely proclaimed reason for war, and a clearly articulated political strategy led to confusion, strained alliances, and failed attempts to gain international support for the operation. This approach alienates allies and their constituents, makes it difficult for any democratically elected official to join the operation, and risks turning any potential success in Epic Fury into a Pyrrhic victory.

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