IPURPOSE · ESSAY

The Submarine in My Harbour

VICTORIA, BRITISH COLUMBIA · ON THE EVE OF 23 MAY 2026

Tomorrow is my mother's birthday.

I mention it because the rest of this is about steel and sovereigns and pipelines and the Pacific, and a person could read three thousand words of that without remembering that the people writing it have mothers, and that mothers have birthdays, and that the date on which a thing happens is sometimes the most important fact about it. My mother turns another year older in the morning. And in the morning, in the harbour at the foot of the city she raised me in, a Korean submarine will tie up.

Her name is ROKS Dosan Ahn Chang-ho. She is the lead boat of the KSS-III class, 3,358 tonnes surfaced, 83.5 metres long, the first attack submarine in history built by a non-nuclear power to fire a submarine-launched ballistic missile. She left Jinhae Naval Base on March 25, stopped in Guam, refuelled at Pearl Harbor, picked up two Royal Canadian Navy submariners on the Hawaiian leg under an exchange program with the unhelpful acronym REGULUS, and will arrive at Canadian Forces Base Esquimalt at first light tomorrow after a fourteen-thousand-kilometre voyage that is, by any sober reading, the longest crossing in the history of the Korean submarine fleet and the first independent trans-Pacific deployment any Korean submarine has ever made. She is accompanied by the frigate ROKS Daejeon. The two ships will be

alongside through June 2, conducting anti-submarine warfare exercises with the Royal Canadian Navy and the Royal Canadian Air Force.

The boat is named for Ahn Chang-ho, the Korean independence activist who took the pen name Dosan — 도산, island mountain — the first time he saw the Hawaiian islands rise from the Pacific in 1902. The submarine bearing his name has now crossed the same ocean in reverse, one hundred and twenty-four years later, to interview for a job.

I find this kind of thing harder to ignore than I used to.

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The job is the Canadian Patrol Submarine Project. Twelve diesel-electric attack submarines. Acquisition cost between $24 and $30 billion, depending on whose figures you trust. Lifecycle cost between $60 and $120 billion. Decision expected by the end of June. Two bidders left standing: Hanwha Ocean of South Korea, offering the boat currently tied up in my harbour, and ThyssenKrupp Marine Systems of Germany, offering the Type 212CD, a vessel whose lead unit has not yet been launched and will deliver to Norway first in 2028.

I want to be careful here, because the comparison can be made to sound like a slogan and it deserves better than that. So let me put it the way an honest staffer would put it, sitting at a table with two folders.

In folder one, an operating submarine. Commissioned 2021. Already in service with the Republic of Korea Navy. Has crossed an ocean to be evaluated. Carries six K-VLS vertical launch cells capable of firing the Hyunmoo-4-4 ballistic missile and the Chonryong land-attack cruise missile. Range ten thousand nautical miles. Endurance fifty days. Built by a yard employing thirty-one thousand people on a five-square-kilometre site in Geoje that has delivered fourteen hundred vessels since 1973. The bidder, Hanwha Ocean, has signed a binding memorandum of understanding with Algoma Steel — three hundred and forty-five million Canadian dollars to build a structural beam

mill in Sault Ste. Marie, contingent on the contract award, that saves up to five hundred of the one thousand Algoma jobs disappearing this spring. Hanwha has pledged a joint venture with the Automotive Parts Manufacturers' Association to assemble K9 howitzers, K10 ammunition carriers, K21 Redbacks and K239 Chunmoos in Canada under majority Canadian ownership. KPMG has scored the industrial package at two hundred thousand job-years over fifteen years.

In folder two, a submarine still in fabrication. Built around an elegant diamond-shaped low-signature hull, optimised for the Greenland-Iceland-United Kingdom gap, with no vertical launch system. The lead unit will go to Norway. Canada would be third in line. The bidder, ThyssenKrupp Marine Systems, has declined to publicly disclose its Industrial and Technological Benefits proposal, preferring what its spokesperson calls "a strong government-to-government partnership between Germany and Canada." The German Defence Minister, Boris Pistorius, has said in Ottawa that "the Koreans build excellent submarines, but we build better ones." TKMS's chief executive has said that Canadian production "should come at the end of the contract, many years down the line."

This is not a difficult choice on the merits. The merits are what they are. What's interesting is what the choice is about, which is not really submarines at all.

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I read a post about an hour ago, before sitting down to write this, on a defence wire. Red Cat Holdings — an American drone company — has acquired Quaze Technologies, a Canadian wireless power transfer firm. The technology is dual-use. Drones, robots, autonomous systems, military and civilian both. The IP walks south. The Canadian engineers stay where they are, or they don't, depending on the terms. No Canadian capital aggregator was in the room to bid. There rarely is.

That is the default. That has been the default in Canadian defence-adjacent technology for thirty years. Something gets built here, it gets bought from down there, the value travels, and the people who built it either follow it or watch it disappear over their shoulder. The polite phrase for it is unlocking value. The honest phrase for it is extraction.

The Hanwha-Algoma MOU is the opposite of that. It is foreign capital flowing into Canadian steel, contingent on Canada choosing a partner instead of a vendor. Three hundred and forty-five million dollars committed before the contract is awarded. A beam mill in Sault Ste. Marie. Jobs that were already disappearing, saved. The K-vehicle joint venture is the same shape, larger. Canadian majority ownership, Canadian CEO, Canadian steel, Canadian workers, building Korean platforms under licence for the Canadian Armed Forces and for export. This is not philanthropy. It is what a partner does to demonstrate that the relationship is the point.

Same week, two futures of the Canadian industrial base, side by side. One in which Canadian industrial capacity gets aggregated by a partner who needs it. One in which Canadian industrial capacity gets disaggregated by a buyer who doesn't.

The submarine decision is a vote on which of those two futures we want more of.

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The other thing I want to say plainly, because nobody else will, is that Canada's geographic problem has rotated ninety degrees in the last decade and almost no one in Ottawa has caught up to it.

Canada has three oceans. For seventy years, the centre of gravity of our naval problem was the Atlantic, and the doctrine was simple: hunt Soviet submarines in the GIUK gap alongside our NATO allies. The Type 212CD is a magnificent boat for that mission. Its hull is shaped for the GIUK gap. Its sensors are tuned for it. Its endurance is calibrated for it. If the threat were still principally the

Russian Northern Fleet in the North Atlantic, the German bid would be the right answer and this would not be a hard call.

But the threat is no longer principally there. The threat is in the Pacific. The People's Liberation Army Navy is preparing — the U.S. Naval Institute has now said this openly in print — for submarine deployment into the Arctic through the Bering and Aleutian gaps. China has declared a goal of becoming a "polar great power" by 2035 and now calls itself a "near-Arctic state" with a straight face. The DPRK is developing a nuclear-powered submarine with reported Russian assistance. The Russian Pacific Fleet is more active than it has been in thirty years. And the seam where all of this meets is the strait between Vancouver Island and the Alaskan panhandle, which is to say, the body of water visible from my mother's living room window.

> *Choosing a North Atlantic boat to defend a Pacific threat geography is the kind of category error empires make in their decadent phase.*

Canada is not an empire, and it is not yet in its decadent phase. But it is being asked to make exactly that error, very politely, by people in beautifully tailored suits who have been doing the rounds in Ottawa for six months. The honest answer to those people is thank you, and no. The submarine in my harbour was built for the ocean in front of it. The submarine still on the drawing board in Kiel was built for a different ocean entirely.

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But the submarine is not the deal. The submarine is the gate.

Behind the gate is an architecture that, if you squint, has been quietly assembling itself for three years. KOGAS, the Korean state gas utility, owns five percent of LNG Canada Phase 1, which shipped its first cargo last June and is now negotiating Phase 2 with TC Energy and Coastal GasLink — a

doubling of capacity, final investment decision expected by the end of this year, designated by the federal Energy Minister as a project of national interest. The Carney-Smith Memorandum of Understanding, signed in Calgary on November 27 last year and reconfirmed last week, contemplates a tidewater pipeline from Alberta to the northern British Columbia coast, with design and construction beginning as early as September 1, 2027. Bill C-48 — the Oil Tanker Moratorium Act — prohibits crude tankers in those waters but explicitly does not prohibit refined products: diesel, jet fuel, gasoline, propane, methanol. A refined-products corridor threads the political needle that crude could not. The Korean energy security demand profile is heavily weighted toward refined products, LNG and critical minerals. The Korean National Pension Service manages one and a half thousand trillion won — over one trillion U.S. dollars — posted an 18.82% return in 2025, the highest in its history, and is mandated to expand its overseas alternatives allocation aggressively through 2030.

None of these facts is a secret. None of them is the submarine. All of them are downstream of whether Canada decides, in the next six weeks, to treat South Korea as a partner or as a vendor.

A partner gets the pipeline conversation. A vendor does not. A partner gets the pension capital. A vendor does not. A partner gets the K-defence joint venture and the Algoma beam mill and the Hanwha LNG project in Newfoundland and the Telesat MOU and the MDA Space partnership and the Cohere alliance. A vendor gets a purchase order and a sustainment contract and a polite goodbye when the warranty expires.

The submarine decision is the gate-pass on which of those two relationships we want.

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The Korean Chief of Naval Operations, Admiral Kim Kyung-ryul, arrives in Victoria tomorrow. He was inaugurated in his post nine weeks ago. A bipartisan delegation of Korean National Assembly members has flown in with

a personal letter from Speaker Woo Won-shik. The Republic of Korea Navy is bringing, as a gift, two scale-model submarines, each filled with seawater drawn from Jinhae harbour. There is something almost embarrassing about the gesture in a Canadian context — we are not, by national temperament, a people who hand out small bottles of sentimental seawater — and there is also something I find I cannot dismiss about it, which is that the Koreans understand, in a way Canadians sometimes do not, that the relationships that matter are the ones in which someone sailed fourteen thousand kilometres carrying a jar of his own harbour to give to you.

Esquimalt is from the Lekwungen word es-whoy-malth — place of gradually shoaling water. The Coast Salish were here for four thousand years before the first Royal Navy hospital huts went up in 1855. On June 29, 1865, the British Empire moved its Pacific Station headquarters from Valparaíso, Chile, to Esquimalt, on the theory that the future of imperial power in this ocean would run through the northern Pacific, not the southern. They were correct, eventually, in ways they could not have anticipated. The base passed to the Royal Canadian Navy in 1910. The harbour has been receiving foreign warships, with appropriate ceremony, for one hundred and seventy-one years.

Tomorrow morning it will receive one more.

Six weeks from now, the Prime Minister will make a decision. I do not know what he will decide. I know what an honest reading of the facts recommends, and I have laid out what I take that reading to be. But what I want to say tonight, on the eve of my mother's birthday, looking out over a harbour that has been doing this for a century and three quarters, is that the submarine arriving in the morning is not really asking us to evaluate a platform.

It is asking us whether we still know how to recognise a partner when one sails fourteen thousand kilometres to introduce himself.

— J.J.

Jesse James writes from Victoria, British Columbia. Published 22 May 2026 on the eve of arrival. The Canada-Korea Pacific Infrastructure thesis is developed at npsi.ca; NPSI Working Paper 03 is anchored to the 23 May–2 June 2026 deployment of ROKS Dosan Ahn Chang-ho and ROKS Daejeon to Canadian Forces Base Esquimalt. This essay is published under the iPurpose imprint: intelligence with intent.