

A brief history of Korea's welfare system and its future challenges

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ABSTRACT

It is evident that the Korean welfare system has changed throughout its history. Whereas the traditional feudal Confucian-based welfare system is based upon residualism that leads Korean people be prone to „private welfares“ which „could be purchased in the market or provided by private sector employers, the current welfare system is „the dual principles of,, residual model in which state intervention remains limited and the family and the private market economy play the central roles in providing a social safety net“ and work-linked welfare“ that have an emphasis on „the preference of individuals“ and their families“ responsibility over the government“s responsibility for social assistance and the obligation of the persons who are aimed of finding a job. This work will concentrate on revealing the historical trajectory of Korean welfare system that is related to a number of changes in politics, economics, society, and etc. and will also analyze its future challenges that are linked to its past and current changes.

KEYWORDS: Korea, welfare system, historical perspectives, future challenges, Confucianism, residualism, Bismarkian model, work-linked welfare,

1. INTRODUCTION

The term welfare is regarded as „a range of government programs that provide financial or other aid to individuals or groups who can't supports themselves“. Welfare might be deemed as „being for people who are poor or in need or a form of social protection³ or the right of every citizen“. There are a great number of models, i.e., Residual welfare, Solidarity, Institutional welfare, Industrial achievement/performance, and etc. (For more details, please see, Uop; Ec; Spicker) It is very typical that welfare programs are funded by taxpayers and enable people to cope with financial stress during rough periods of their lives. People, who use welfare, will receive a biweekly or monthly payment in most cases. (Investopedia) Throughout its history, Korea's welfare system transformed from the traditional feudal Confucian-based welfare system to the current residual welfare system. In some respects, essential institutional structures and systems originated from the West were imported by Korea, like other Asian countries including Japan, Taiwan, Hong Kong, and Singapore. It is evident that these countries also have big varieties, since they uniquely established their own system (Jacobs, 1998). Apart from other countries, Korea (and also Taiwan) was highly and extremely affected by the Japanese colonial period in the proper sequence and they did adopt Japanese social welfare system that has a lot in common with the Bismarkian model (Jacobs, 1998) and that is related to an unspecified number of characteristics of Bismarkian model that that is „dominated by insurance and is institutionally fragmented along occupational lines“ (Jacobs, 1998) and exerts dominance over insurance and is divided into „occupational lines“ by an institution: its social welfare system is based on insurance and is organized along occupational groups, implying an institutional segmentation that „reinforces differentials in power and status in society“. (Jacobs, 1998; Goodman, White & Kwon, 1998a) At the same time, however, Jones (1990) indicated that the Japanese social welfare system lacks workers“ participation, a typical fundamental feature of the Bismarkian model. (Jacobs, 1998)

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³ *“Social protection, or social security, provides benefits to individuals on the basis of risks faced across the life cycle (e.g., unemployment, disability, maternity, etc.) and to those suffering general poverty and social exclusion. Social protection schemes can be financed through contributions from wages (social insurance) or through general taxation (social assistance). Since the turn of the last century, social protection programmes have continued to grow in every region of the world, and their function in stabilizing the economy and protecting vulnerable groups has been repeatedly demonstrated, including during recent global crises. While their benefits are widely accepted, additional investments are still needed to increase coverage of social protection schemes globally, in particular in lower-income countries.” (Ilo)*

The traditional welfare system has been residual. In Korean social assistance system, it means that it was „means-tested“ in a strict manner and „targeted“ in a high manner. Since „the social insurance system, social welfare service sector,“ (Park, Yong-soo, 2008) and an unspecified number of social assistance programs were not fully developed, they could not understand novel and sustained forms of „risks and insecurities“ that was caused by the market, and hence could not protect Korean people against them in a meaningful manner. Consequently, they had to be prone to be severely dependent upon „private welfares“ which „could be purchased in the market or provided by private sector employers. The current welfare system forms as a base of „the dual principles of „residual model in which state intervention remains limited and the family and the private market economy play the central roles in providing a social safety net“ (Park, Yong-soo, 2008) and work-linked welfare“ that have an emphasis on „the preference of individuals“ and their families“ responsibility over the government“s responsibility for social assistance and the obligation of the persons who are aimed of finding a job. „This dual system“ is abided not only by „financial difficulties“, but also by proving more powerful than opposing forces that are related to „government decision makers“ and by the greater number of the people living in the country. (Jung, Young-tae & Shin, Dong-myeon, 2002) It should be said that it is only the early phases of a welfare state that Korea has experienced. Due to its very low welfare expenditures, the country is not able to provide a significant contribution to „domestic consumption“; lead the economy to become more stabilized or provide a paramount contribution to „a flexible market“ that is decisive for and essential to „an export-oriented economy“ and to domestic demand in the market. Korea is unfairly prejudiced for welfare expenditures that might be regarded as „a macroeconomic auto-stabilizer“. If Korea is aimed at being „a sound welfare state“, it has to overcome its prejudiced conception or belief that welfare expenditures that are destructive and wasteful. (Kim, Yeon-myung, 2015) In contrast, poverty rates will diminish in case of being boosted in the social expenditure ratio. (Cichon & Scholz, 2009, 83f)

“The results show that with an increase in either per capita income or the social expenditure ratio, poverty rates fall, but the connection between the reduction in the poverty rate and the increase in the social expenditure ratio is significantly stronger than between the poverty rate and per capital in-come.” (Busch, 2010)

Another significant view upholding by Korea is that

“the investment in social welfare is increasingly seen as a positive economic proposition as social care expansion is closely interlocked with expansion of service industries, job creation, employment opportunities for women, and economic activation. (Peng, 2010; Peng, 2011b)” (Peng, 2011a)

It should be highlighted that the significance of public deliberation⁴ in the planning of reforms and policies, i.e., health care has been already realized by a large number of societies, i.e., the United Kingdom (Lenaghan, 1999). In this regards, one can consider deliberative democracy⁵ as an inevitable step toward important implications and implementations for the future planning of reforms and policies not only in the field of social welfare expenditures, but however in every policy field. For instance, although a larger share of Gross Domestic Product on tertiary education is spent by the Korean government (only under 5% of Gross Domestic Product, relatively below the other rich-country average) by comparison with other rich countries, large part of the spending letting Korean education really good is not public, neither is it private. 2.8% of Gross Domestic Product, the highest rate in the Organization for Economic Cooperation and Development, is additionally spent by Korean families. What is more, families spend three time that of the state on university education. For instance, 8% of their household budgets are spent on after-hours for each child by the Korean families. (Economist, 2011) Korea has evolved significantly to turn into a welfare state over time. In the past, welfare development was hindered by limited resources and defense spending priorities. Although the Asian financial crisis obliged Korea to be a welfare state, public expenditure on family policies in Korea was rather thin up to the early 2000s (Hong, Ijin, 2024) and there has been a gradual increase in welfare spending since the early 2000s. The term welfare state was emerged in the United Kingdom in the 1940s (Hennock, 2004).

The effects of Confucianism on the Korean welfare state

“As a matter of distribution, welfare is a highly political and politicized issue. To increase welfare, meaning some combination of providing support for daycare, dole for the elderly, and cuts in tuition, among other things, will almost certainly mean an increase in taxes. Whose taxes will increase? That’s not known; indeed, this question is part of the larger debate. For those interested in the matter of welfare state expansion or retrenchment in “late” industrializers (e.g., South Korea), this issue will be of great interest. While it is uncertain how, exactly, this debate will ultimately unfold, here is a brief summary of what’s going on right now and what we can expect.” (Denney, 2015)

According to archaeological evidences, the first known ancient permanent sedentary Kingdom of Gojoseon or the first recognizable permanent sedentary state or the first organized nation to

⁴“Deliberation” is “debate and discussion aimed at producing reasonable, well-informed opinions in which participants are willing to revise preferences in light of discussion, new information, and claims made by fellow participants.” (Chambers, 2003)” (Raisio, 2010)

⁵“Deliberative democracy” can then be defined as “an association whose affairs are governed by the public deliberation of its members.” (Cohen, 1991)” (Raisio, 2010)

be formed by the first ancient permanent sedentary Kingdom of Gojoseon or the first Korean nation of the first ancient permanent sedentary Kingdom of Gojoseon or the first recognizable state of the ancient Korean Peninsula’s people in Ancient Times (c. 800 or 700 BC - 108 BC) was established in the Korean Bronze Age (late 800 or 700 BC - after 300 BC). (Korea.net) This means that the Korean Peninsula experienced the emergence of complex society that has long been considered to be as a social and economic corollary of its Bronze Age agriculture (late 800 or 700 B.C.E. - 300 B.C.E.). (Shin, Sook-chung et al., 2013) Agricultural improvements (with iron tools introduced from China) and plentiful natural resources like gold, silver, copper, tin, and zinc led it to prosper. At this time, it invented the famous ondol under-floor heating system and produced the first Korean grey stoneware. According to these historical facts, this period marks the fact that people of the first recognizable permanent sedentary state of Gojoseon enjoyed the first welfare state in the Korean Peninsula. Attacks from the neighboring Yan state c. 300 BC led the first recognizable permanent sedentary state of Gojoseon to weaken and eventually collapse in the 2nd century BC. In addition to Shamanism⁶, it is known that its successor, Wiman Joseon (194 BC-108 BC) adopted first Confucianism (Cartwright, 2016a) in 109 BC when Wu-Ti, the Han Dynasty Emperor, excessively burdened the first recognizable permanent sedentary state of Gojoseon by both sea and by land, divided northern Korea into four bases, or „Commanderies“, Four Commanderies, which directly administered by their central government (Cartwright, 2016b) of Han or the Han Dynasty (206 BC-220 CE or 9 CE or 8 CE) (Contents.nahf, 2011)⁷ in the region as a way to stabilize the area for trade, and tremendously interested in natural resources including iron and salt and iron (Cartwright, 2016b). (Id.Korean culture, 2022; for more details, please see, Cartwright, 2016a; Cartwright, 2016b; Cartwright, 2016c)

Later, territories of the first recognizable permanent sedentary state of Gojoseon would turn into the Proto-Three Kingdoms Period, which was spilt into the Three Hans of Byeonhan, Mahan, and Jinhan (no connection to the Chinese Han), which became the three states of Baekje (Paekche), Gaya (Kaya), and Silla in the subsequent Three Kingdoms Period, in the southern part of Korea at this time, often referred to as the Proto-Three Kingdoms Period, was spilt into the Three Hans of Byeonhan, Mahan, and Jinhan (no connection to the Chinese Han), which became the three states of Baekje (Paekche), Gaya (Kaya), and Silla in the subsequent Three Kingdoms Period. The aforementioned kingdoms benefitted from the sophisticated culture that was brought by refugees from the collapsed Gojoseon and defeated Wiman Joseon states. (Cartwright, 2016b) During the period of the Goryeo or Goguryeo or Koguryô Dynasty (37 B.C.E. - 668 C.E.), the poor and commoners, especially in the form of Medicare, benefit from assistance which was given to them by a series of Kings, i.e., the Later Three Kingdoms (892-936), and the Koryô (918-1392) (for more details, please see, Oh, Chi-hoon, 2020). (Goo, J.H., 1970; Hong, Jun-sung et al., 2013) China provided the Goryeo or Goguryeo or Koguryô Kingdom (37 BC-668 CE) with a beginning knowledge of Confucianism throughout the 4th century. (Levi, 2013) Monarchy is the oldest form of the system of government of the Three Kingdoms. A monarch ruled Korea with the aid of senior administrative officials that were drawn from a landed aristocracy. Officials, who administered the provinces with the aid of local tribal leaders, were appointed by government.

⁶The Unified Silla Kingdom (668 C.E.-935 C.E.), the Goryeo Dynasty (918 C.E.-1392 C.E.), and the Chosôn (1392-1877) were traditionally practitioners of Shamanism. (Mugyo, 2018; Terms.naver; Arevik Chačatran, 2016)

⁷Four Commanderies from China's late ancient and medieval Han Dynasty being consisted of Lelang (108 BC-313 CE), Zhenfan (107 BC - 82 BC), Lintun (107 BC - 82 BC), and Xuantu (107 BC - 302 CE) established in the late ancient Gojoseon Korean Peninsula between 108 BC and 107 BC. (Contents.nahf, Korea-China history awareness, 2011)

The majority of the populations were called landed peasantry, and the state of the Three Kingdoms extracted a tax from them which was commonly payable in kind and would also be able to force citizens to fight in the army or work on government projects including building fortifications. At the very bottom of the social ladder were named slaves (usually prisoners of war or those in serious debt) and criminals, who were obliged to work on the estates of the aristocracy. Society was rigidly and strictly divided into social ranks, „best epitomized by the Silla sacred bone rank system which was based on birth and dictated one's work possibilities, tax obligations, and even the clothes one could wear or the utensils one could use.“ (Cartwright, 2016b) During the period of the Three Kingdoms (57 BC-668 AD), Confucianism, as „a religion and a philosophy of social order“, (Bidgoli, 2010) had a great influence over the Korean peninsula in every aspect of life and its influences also extended much further than that, especially through the introduction to Baekje or Paekche and to Shilla much later on. (Levi, 2013) In terms of Confucius' disciple, the government consists of the five good principles and four bad principles which the rulers should prevent from the happening of “the principle of cruelty, the principle of oppression, the principle of injury and the principle of meanness.” (Hsü, 1932) Confucius had an emphasis on the five good principles which compose the principles of the benevolent government:

“First, to benefit the people without wasting the resources of the country; secondly, to encourage labor without cause for complaint; thirdly, to desire for the enjoyments of life without being covetous; fourthly, to be dignified without being supercilious; fifthly, to inspire awe without being severe.” (Hsü, 1932; Yong, Xia, 2011)

The second principle of benevolent government recommends that the tax system be so good organized that the people had no reason to even make a complaint against the government. During the time of Confucius, the people had to impose taxes on service. The people could not meet the autocratic government's demand for the people's labor during the busy farming's seasons. As a result, they expressed their discontent. Since Confucius did refer the government to the parent and the teacher of the ruled instead of being rather as a market keeper of the ruled, the responsibility for wise tax-collection is given to the government by him. There is no doubt that Korea's tax policy and its tax structure has changed a lot throughout its history. (Hsü, 1932) Nuyen (2000) discussed the importance of „the Confucian idea of min-pen (or min-ben, people as roots or the concept that people are the foundation of government)“and emphasized that a Confucian state truly governing with the idea of min-pen would become flourishing democratic indispensably and successfully.

“To govern according to the idea of min-pen is to govern for the people (min), for their well-being, their prosperity and their security, thus tending to the people as one would tend to the roots (pen) of a tree. The emphasis on governing for the wellbeing and prosperity of the people can be found in the writings of Confucius (e.g. Analects 13.9).” (Nuyen, 2000)

Throughout the Three Kingdoms period when the Korean peninsula was divided into the Kingdoms of Silla, Goguryeo, and Baekje, monarchs gave assistance to those ordinary people being displaced and experiencing intolerable levels of severe privation by natural disasters which continually occurred throughout the Kingdom of Silla, when the unification of the country occurred, namely the Three Kingdoms (57 BC-668 AD). (Hong, Jun-sung et al., 2013) Silla Kingdom assumed the control of all of Korea in 668 CE, and formed a new state, namely the Unified Silla Kingdom (668-935 CE).⁸

⁸“...The in-fighting between the Korean states was finally settled by outside intervention from China. Goguryeo had successfully rebuffed three invasions from Sui China in the 7th century CE, and then the Tang Dynasty (618-668 CE) The Unified Silla Kingdom (668-935 CE) is known as the first dynasty to rule over the whole of the Korean peninsula. It owned a state in the north at this time, namely Balhae (Parhae), yet most of its territory was established in Manchuria and so the majority of historians do not consider it a Korean state proper. The whole state was divided into nine provinces (three belonged to each of the old Three Kingdoms) and five secondary capitals. Geumseong continually became as the overall capital, and then it was known as Seorabeol that „benefitted from an extensive rebuilding program, pleasure palaces and temples, and would eventually boast a population of around 900,000.“⁹A thriving agricultural industry, which was made more productive via extensive irrigation projects, and trade throughout the East China Sea led The Unified Silla Kingdom to prosper. In addition to that, the prolonged absence of war indicated that „the arts and sciences flourished as never before.“

Thus, it should be highlight that the Unified Silla Kingdom continued to be welfare state. However, the state of the Unified Silla Kingdom slowly declined from the 8th century CE, mainly because of *“the rigidity of its class structure, still based on the bone rank system, the strict social classification of entitlements and obligations. Not only did the lack of opportunity to rise above the class of one’s birth create a stagnation of ideas and innovations but the aristocracy began, too, to resent the power of the king. At the other end of the social ladder, the peasantry grew more and more resentful of the incessant taxes levied upon them. On top of that, local landed aristocrats became ever more difficult to control from the capital. The state was falling apart from within.”*¹⁰ (Cartwright, 2016b) After the collapse of the Unified Silla Kingdom, Goryeo (Koryo) ruled Korea from 918 CE to 1392 CE. By 1033 CE the Goryeo (Koryo) Kingdom flourished and the capital Songdo boasted over 1000 shops. It was the first time that Korea had minted its own coinage (996 CE), the unbyong (aka hwalgu) silver vases were made from 1101 CE, movable metal type printing was invented, and the older method of woodblock printing refined. (Cartwright, 2016b) Like the Three Kingdoms (57 BC-668 AD) and the Later Three Kingdoms (892-936), the Koryô (918-1392) (for more details, please see, Oh, Chi-hoon, 2020) formed into feudal tax systems. (Jacobs, 1998) In 1109, King Ye-jong (1105 - 1122) during the Koryô Dynasty (918-1392) promulgated a welfare organization, namely Kujedo*gam, which gave assistance to the poor and the people undergoing hardship

907 CE) attempted an invasion in 644 CE, but the great general Yang Manchun once again brought victory to the Koreans. Goguryeo had joined forces with Baekje and successfully invaded Silla territory two years before, but the Tangs were not done with their plans for Korea and they decided on Silla as their temporary ally to defeat the other two remaining Korean states. In 660 CE, a Silla army of 50,000 led by the general Kim Yu-sin and a naval force of 130,000 men sent by the Tang emperor Gaozong proved more than enough to crush Baekje and its king, Uija, was taken to China. Then in 667 CE Pyongyang fell, and the next year the Goguryeo king Bojang was likewise taken prisoner to China along with 200,000 of his subjects. Silla had no intention, though, of becoming a Chinese vassal state and defeated the remaining Tang army in battles at Maesosong (675 CE) and Kibolpo (676 CE). Silla then took control of all of Korea in 668 CE, forming a new state, the Unified Silla Kingdom.” (Cartwright, 2016b)

⁹*“A whole series of administrative regions, prefectures and counties were created right down to village level. To consolidate the Kingdom, troublesome peoples and the ruling elites of the former Kingdoms were forcibly relocated and village headmen were compelled to send their eldest sons to work in the capital administration or military.”* (Cartwright, 2016b)

¹⁰*“Two individuals would cause particular trouble for the Silla kings. One Gyeon Hwon, a peasant leader, took advantage of the political unrest in 892 CE and formed a revival of the old Baekje kingdom in the south-west. Meanwhile, an aristocratic-Buddhist monk leader, Gung Ye, declared a new Goguryeo state in the north in 901 CE, known as Later Goguryeo. There then followed another messy power struggle for control of the peninsula just as there had been in the Three Kingdoms Period, indeed this period is often referred to as the Later Three kingdoms Period. Kyon Hwon attacked Geumseong in 927 CE while Gung Ye’s unpopular and fanatical tyranny led to his death at the hands of his people. He was succeeded by his first minister, the able Wang Geon, in 918 CE, who attacked Later Baekje, now beset by leadership in-fighting, and then Silla. The last Silla king, Gyeongsum, surrendered in 935 CE and left Wang Geon to unify the country once again but under a new name, the Goryeo Dynasty.”* (Cartwright, 2016b)

led by natural disasters, especially „free medical and funeral services.“ Shortly afterwards he set up another welfare organization, namely Hyeminso, which provided free medical services for the ordinary people, including the poor and oppressed. (Goo, J.H., 1970; Hong, Jun-sung et al., 2013) This might be considered to be the first formal and official attempt to be a welfare state. The general Yi Song-gye or Seong-gye formed the new state of Chosôn or Joseon in 1392 CE. (Cartwright, 2016b)¹¹ The Chosôn (1392-1877) Dynasties formed into feudal tax systems. (Jacobs, 1998) In the 15th century, throughout the Chosôn Dynasty (1392- 1877), King Sejong, formed the idea of the (almost) ideal Confucian welfare state philosophy in the mind, and established it. However, Yi Su-gwang detailed and complicated in design and planning of the welfare ideology in the aftermath of the Hideyoshi invasions by personally going to the country and becoming involved in „manual labor“ because of the special importance of labors rather than farming. Egalitarian principles were deeply emphasized by such people; public welfare programs became a matter of interest to the public. Yi Ik emphasized that it is generally imperative that learning or knowledge be attempted to find a profit to the everyday life of the people. According to him, factionalism was caused by „a deep-seated concern for the welfare of the people.“ Furthermore, Kim Yuk implemented the Taedongpop and encouraged to increasingly make use of vehicles. Hong Tae-yong and Pak Chi-won referred „increased vehicular traffic „to take advantage of the growth of the national economy““.

Chong Yak-yong, a prominent scholar converting to Catholicism, „advocated a system of land distributions based on egalitarian principles, and the placement of people in professions in accordance with their ability.“ However, despite opposition not only to „Confucian ancestral rituals“ but also to „rigid social stratification“, conversion to Catholicism increased secretly and gradually in Korea, „especially among artisans such as pottery makers, impoverished farmers and Yangban who came to depend more on religious salvation“, since it meets the necessities of the people, including „the new egalitarian principles and stressing salvation.“ Since the Yangban officials were oriented by the Confucian principles, they attempted to ensure the people's welfare (especially, medicine) by means of some important studies, literary (poems), and painting. With regard to some details, this development occurring between the 17th and 18th centuries is regarded as redolent of „the Renaissance period of Western Europe.“ (Asian-info) By the end of the 18th century, in the aftermath of a long and arduous search for Asian markets, it was the first British who physically explored Korea. By the early 19th century, the Korean government attempted to offer a public and private employee pension scheme to the entire target population. In the aftermath of rapid economic growth, the Korean government distributed large sums in the national budget for social development schemes. (Savada& Shaw, 1990) Not only the Korean economy but also its social circumstances developed tremendously.

¹¹ *“Prosperity had its downside and resulted in a steadily increasing decadence among the ruling elite, corruption, and social unrest. Open rebellions broke out in 1126 and 1135 CE which were ultimately quashed, but matters came to a head in the reign of king Uijong who was much criticised for building lavish palaces and water parks. The military, with not much else to do and no status in higher society, staged a coup in 1170 CE. Uijong was replaced by his brother Myeongjong but he only remained as a puppet sovereign. Decades of turbulent in-fighting between all levels of Goryeo society ensued with more coups, assassinations, and slave rebellions. Worse was to come, though. Ghengis Khan, who had unified the Mongol tribes, had swept across China, and his son Ogedei Khan turned his attention to Korea in 1231 CE. Goryeo was forced to move its capital to Ganghwa Island the following year. While the ruling elite was safely ensconced on their island, the rest of the Goryeo population had to face six Mongol invasions over the next three decades. By 1258 CE, the people had had enough and the military ruler was assassinated, the king reinstated with full powers, and peace made with the Mongols.”* (Cartwright, 2016b)

In essence, the Korean people were in favor of foreign ideologies and European commercial business activities that were taken into account seriously. Some officials thought that national finance had to be reformed thoroughly. Even though the proposal was examined by the central government, a strenuous effort in the face of difficulty led to be prevented from accomplishing a purpose of its implementation. Consequently, many agrarian rebels progressively caused turmoil in politics. To ensure their political power, the Confucian-oriented powerful Yangban officials were married to the royal family, and furthermore they had attached less importance to the people's general welfare than ever before. In addition, during the period of 1812-1862, not only adverse natural circumstances, such as drought and floods leading to poor harvest and a series of severe famine, but also social conditions following as a consequence of extreme tax collection and forced labor caused a cycle of agrarian revolts in many parts of the country, including in the north, namely Kasan, in the southern part of Korea, namely Chejudo island, in Chinju, Kyongsang-do province, Cholla-do and Ch'ungch'ong-do provinces, in Hamgyong-do and P'yong-an-do provinces in the north.

Consequently, such social circumstances led Ch'oe Che-u (1824-1864) to methodically devise a proposal of the ideology of Tonghak (Eastern Learning- a religion based on a combination of music and traditional components derived from Confucianism, Buddhism, as well as Son- gyo (teachings of Shilla's Hwarang)) for the purpose of saving the farmers from intensive and extensive poverty and turmoil and reinstating stability not only in politics, but also in society. His religion was vividly accepted by the society. (Asian-info) During the 1840s, Russian and French firstly appeared in the Korean peninsula and this led to tremendous enthusiasm among the Korea people. In 1863, Prince Yi Ha-ung (Taewon-gun or Prince Regent) was firmly opposed to foreign commercial businesses within the country. Some developments did occur in the Korean economy and society; including bankruptcy of the larger number of Yangban class, opposition of the peasants and merchants to the Confucian-based traditional social restrictions, rise in number of the Yangban's children, as well as lower origin's mothers. Although people increasingly were subjected to tax through as result of the emancipation of slaves, the ruled exploited class led the state's tax revenues to decrease. (Asian-info) In the aftermath of the reassertion of „the Confucian underpinnings giving a particular emphasis on the great significance of „family and community based mutual support, and non-dependence on the state“ (Jones, 1990, 1993; Chan, A., 1996; Sung, Sirin, 2003; Peng, 2008; Lee, Hye-kyung, 2009) and teachings under the form of Neo-Confucianism“ (Levi, 2013), Neo- Confucianism did dominate the Chosŏn Dynasty and it was regarded as „the national religion

and ideology." (Cho, Seung-hye, 2016) During this period, welfare systems for the poverty-stricken and orphaned people were created by „the majority of kings" through the expansion of health care services. (Hong, Jun-sung et al., 2013) However,

“Ninety years earlier, in 1907, the Korean Empire owed Japan 13 million won, equivalent to an entire year’s budget. To help pay it off, men quit smoking while women sold their cherished wedding jewelry.” (Holmes, 2016)

People showed passionate solidarity with their King. This was mainly related to „the unique Confucian way of understanding human relations, which is perceived as a complex web of intertwined relations, a web in which the public and the private exist on a continuum (Lee, Jin-min, 2010)". This might be the first example of the ultimate sacrifice for their country.

The Korean welfare system during and after the Japanese occupation

Throughout the Japanese occupation (1877-1945), also known as the period of the Japanese imperial colonial administration, since the Korean government was seized by the Japanese imperial army, little or no access to services in society. Medicare had also obtained by all the Korean people. Actually, assistance in any form of social services was given to less than 1% of Korean people by the Japanese administration. (In, K.S., 2000; Hong, Jun-sung et al., 2013) In the aftermath of World War II that officially put an end to Japanese occupation in the Asia-Pacific region, the United States of America took control over the country and was caused to become entangled in a „neocolonial relationship with the United States" (for more details, see Kim, Rebecca, Y., 2015) from 1945 to 1948. Korean people devote tremendous energy and a vigorous attempt to the provision of social services for the poor people throughout the period of decolonization. However, Korea had to struggle with the shortage of resources regarding as a main blockade. After Korea had been ravaged by World War II, known as the Second World War, which broke out between the 1930s and 1940s, socio-economic challenges and deficient resources did not allow the country to afford social services. Therefore, some international non-governmental Organizations, including the Red Cross became a fundamental component of the Korean social welfare in order to afford Medicare and relief to the suffering poor. At this time, another War, known as the Korean War, lasted from 1950 (on June 25) to 1953 (on July 27). After the Korean peninsula has been separated into two parts, not only North but also Korea was ravaged by the Korean War. Especially, throughout and in the aftermath of the war, children were subjected to the severe consequences of the war, including robbing a place using violence, severe and extensive damages. (Hong, Jun-sung et al., 2013)

The Syngman Rhee administration (1948-1960), the First Republic of Korea, expanded welfare policies and promulgated the work compensation insurance in 1953, and as a result „health insurance, old-age pensions, and unemployment and retirement benefits" was enacted. (Park, C., 2007; Pierson, 2005; Roh, Jung-ho, 2012) However, „the rudimentary welfare laws" were ignored by the Rhee administration. (Chung, Moo-kwon, 2010) It was estimated by the United Nations (UN) Korean Reconstruction Agency (UNKRA) that there were 100 000 orphans in 1951 and in 1953 there existed 293 000 widows with 516 000 children; of these, 12 280 were offspring of men from American troops and Korean women. International organizations from the United States came to Korea and establish orphanages. (Hubinette, 2005) In the wave of the political democratization of 1987 and thus economic liberalization of 1987, the Chun Doo-hwan (1980-1988) administration was in need of taking steps to „reform its previously residual (or „small") welfare state (Yang, J., 2017)". (Hong, Ijin, 2024) The political democratization and economic liberalization in 1987 led to increase welfare state expenditures by roughly „0.2-0.4 percentage points," although this impact was not vigorous. (Roh, Jung-ho, 2012) Subsequently, Non-governmental Organizations in South Korea dramatically expanded. For example, 74 percent of the Non-governmental Organizations at the present time in Korea were established after 1987, 35 percent during the Roh Tae-woo administration (1988-1993) and 39 percent during the Kim Young-sam administration (1993- 1998). (Kim, Hyuk-rae., 2000b; Henderson et al., 2002)

The Korean welfare system after the Japanese occupation

Even though social welfare program was adopted by the First Republic of Korea in 1948, the Korean government and international organizations could not pay a significant and foremost attention to afford relief to the suffering people in the war until 1960. Due to „a rigged election and the economic recession", „the April 1950 student revolution" did lead the Syngman Rhee’s first government (1948-1960) to be on the brink of collapse. By 1960, the following Chang Myon (Jang Myeon or Chang Myŏn) government was in a democratic manner elected „with a new constitution" that did serve as „a parliamentary system".

However, a young group from the military elite under the control of the General Park Chung-hee was shattered again soon. (Chung, Moo-kwon, 2010) The Chang Myon administration legislated the Civil Service Pension Scheme in 1960. (Chung, Moo-kwon, 2010) At the same time, however, despite the aim of rebuilding democracy, Chang Myon was forced by the General Park Chung-hee to leave the administration with the purpose of the development of the Korean economy and national defense in May 1961. (Kwon, Seung-ho, 1997) As a result, by 1960 when the General Park Chung-hee (1917-1979) and „a group of younger officers (the 8th class of the Korean Military Academy) who did not recognize his leadership and capability and did not become the backbone of the military coup that was held by him on May 16, 1961 (Moon, Seung-sook, 2009) and free meals to poor people, older people, and people with disabilities were provided by the military government. (Hong, Jun-sung et al. 2013) Rapid economic development throughout the 1960s and 1970s was started by Park Chung-hee. Park Chung-hee's authoritarian presidencies or governments or administrations commonly practiced to delegate care work to women within their families, as men were taking the bulk of waged work outside their homes (Esping-Andersen, 1999). During the years of developmentalism in the 1960s and 1970s, authoritarian governments in Korea took an active interest in dismissing welfare provisions for families by way of repressing dissent in labor and social movements. Prioritizing national productivity and economic growth indicated that virtually no redistributive policies were ready to be issued, with the exception of basic education policies (Wong, 2004). (Hong, Ijin, 2024)

Korea, regarding as state-socialist society, focused on designing and establishing a number of five years plans, each of which had an emphasis on certain industries, such as textiles, heavy industry, chemicals, etc. (Henderson et al., 2002) On the one hand, during the 1960s and 1970s when the development occurred, the economic growth was chiefly and extremely attributed to „strong state intervention and regulation of the market, banks and large companies (chaebols),“ whereas the Korean government social policy approach is basically less close to social welfare by comparison with neoclassical economic theory that stress the importance of „economic efficiency, production, and performance“. The Korean government advocated that several different kinds of socioeconomic objectives including „better incomes and wealth distribution, social benefits, employment expansion, and the improvement of working conditions and living standards“ could be attained in a reflex manner by „a trickle-down effect“ that was engendered by breakneck economic development. As a consequence, „state intervention or government directed income redistribution“ were very destructive to the achievement of social objectives, and were regarded as an obstruction to the success of developing national economy. Under these circumstances, social policy was referred as „secondary and complementary to the advance of strong economic policy.“ The effect of „growth-oriented“ objectives did lead „the status of government departments“ that were involved in „economic affairs“-for instance, the Economic Planning Board-to be moved to „a central state agency“ to exercise authoritative influence over and superintend the whole national policies, whereas those that watched over and directed social problems were undervalued and controlled. (Jung, Moo-kweon, 2002, p. 441; Park, Yong-soo, 2008) On the other hand, it should be highlighted that the chaeya was attributed to a „distributive justice“, whereas Park Chung-hee upheld the view of „economic strategy of „growth first, distribution later““ with regard to both modernization and trickle-down effect in the market. (Kim, Byung-kook & Vogel, 2011) In the early 1960s, the Korean government did put a number of specific social welfare programs into effect. These social welfare programs did become a significant and paramount institutional base for the subsequent extension of the welfare system. „The rudimentary welfare laws“ where the antecedent Syngman Rhee administration had ignored were again structured by the military government. Instead of the „Chosun (or Chosŏn) poor law“ which was traced back to 1944 when Japan did colonize the Korean peninsula, „the Livelihood Protection Law, also known as a public assistance program“ was implemented. A number of other initiatives were enacted in 1961, i.e. „prostitution prevention, increasing job stability, addressing child welfare, revising labor laws and compensation for injured public employees, and etc.“(Chung, Moo-kwon, 2010) With regard to „employment pensions“, „special occupational pension schemes for the civil service and the military“ were implemented during this period. In 1960, the Chang Myon government did put „the Civil Service Pension Scheme“ into effect, whereas the Military Personnel Pension Scheme was enacted by the following military government in 1963. It is also seen that Korea, like other developing nations, did give a tremendous importance to implement the trend of special pension programs for state workers by giving a priority to private sector workers. This can be regarded as a typical characteristic during the process of the state-building. Despite its most crucial and paramount legislation, the Basic Law of Social Security Scheme (BLSSS) was put into effect in 1963 when the military government did begin being more civilian in the Third Republic. (Chung, 1996: quoted in Chung, Moo-kwon, 2010) However, during this period, it was very representative and notional.

“This law stipulated self-help, work incentives, and a minimal level of government involvement in social welfare, implying that there is a trade-off between social welfare programs and economic growth. In other

words, the law was a manifestation of the „developmentalism“ that dominated the modernization process and is deeply embedded in the welfare system as well as in central values of the Korean society.” (Chung, Moo-kwon, 2010)

The earliest two programs, which were introduced and established in the aftermath of military coup d'état in 1961, were put into effect in 1964 and 1965. (Kwon, Huck-ju, 2002)

“...The Public Assistance Program introduced in 1961 (implemented from 1965) was based on the idea of poor relief, and provided cash or in-kind support to the poor as officially defined, depending on the recipients“ situation...(Ministry of Health and Welfare, 2000a)” (Kwon, Huck-ju, 2002)

The government had a great emphasis on „economic modernization and poverty eradication.“ In particular, according to Park Chung-hee, it is imperative that Korea focus on providing rather high employment opportunities than welfare expenditure in order to effectively reduce poverty and promote sustainable economic growth. Thus, Park created job opportunities. At the same time, however, he provided little social protection to the workforce (Kwon, H.K., 2003). Until the 1970s, the Park administration monitored the safety and quality of welfare and social services in all but name. Throughout the 1970s, when Korea chased significantly breakneck economic growth, the Park administration highly concentrated on policies based upon welfare services. „The legitimization of authoritarian political power“ might be regarded as a good explanation of the typical feature of the Korean welfare state and the introduction to some programs „like Industrial Accident Insurance, the Public Assistance Program and the National Pension Program“ that were established „at certain points in time.“ (Kwon, Huck-ju, 2002) From the early mid-1970s, the Economic Planning Board was regarded as the „first government agency“ that realize the imperative for „unemployment insurance“ (Yoo, K., 1999) and interest of Korean economic managers in social welfare analysis within their remit had grown so large that the establishment of social policy originated in „executive decisions“. For instance, President Park Chung-hee's appointment making with the Minister of Social Welfare to discuss the issue of the Economic Planning Board may be regarded as one of the most significant development. (Kwon, H.J., 1999).

The National Pension Program that was introduced in 1977. However, „its feasibility“ was primarily examined by Park Chung-hee in 1972 in the aftermath of the establishment of the so-called Yushin reform. It is apparent that „social welfare initiatives“ were not either the only measure or the most notable and important strategy that was carefully planned to achieve a specific end of his legitimization. His major tactic for his legitimization was to give a justification for „the authoritarian regime through economic development.“ However, „social policies“ did become a significant part of the chief plan that was designed to achieve an overall aim of his legitimization. Consequently, it can simply be seen that the conception of the developmental welfare state „where elite policy makers set economic growth as the fundamental goal, pursue a coherent strategy to achieve it and use social policy as an instrument for attaining that goal (Gough, 2001; Kwon, Huck-ju, 2002)“ did exert a tremendous influence over these features in a good and satisfactory manner. (Kwon, Huck-ju, 2002) The Free and Subsidized Aid Program was created by him in order to reduce provide financial aid for those living in extreme poverty and to provide medical services for all employees and their dependants in large firms that are greater than or equal to 500 employees. Splitting expenses between the employer and the employee were obliged. Subsequently, expansion of the medical insurance policy to those working in firms that are greater than or equal to 300 employees, and civil servants, as well as private-school teachers were implemented by the Park administration. At the same time, nonetheless, approval of „the health insurance law,“ which was recently legislated and postponed „the implementation of universal insurance“ at a later time was not confirmed by President Park. (Aspalter, 2005)

However, in 1976, the Park administration promulgated the New Medical Protection Law that is the same as Medicaid in the United States and offered social relief assistance to low-income households and people living in extreme poverty through benefits given in goods, commodities, services rather than money. On the other hand, another crisis, known as 1979 oil shock, led the Park administration to expand the Korean welfare system and increase in welfare expenditure (0.3-1.1 percentage point). (Roh, Jung-ho, 2012) Shortly in the aftermath of the assassination of Park Chung-hee in October 1979, Chun Doo-hwan (1980-1986), head of the Security Command, took control of the newly government. He attempted to alter the pattern of social welfare system through the strength of households and achievement of self- reliance. Nonetheless, the newly government was naturally inclined to implement an expansion of the national health insurance to „dependants of military personnel and pension recipients.“ (Aspalter, 2005) The Chun government (1980-86) had to struggle with the issue of creating a healthy balance between economic and military interests. Despite the continuous larger

objectives of economic development supported by Chun's closest economic advisors, the Chun's military government, by means of the National Security Council, did prefer to actively encourage the goal of establishing a welfare state and social welfare in terms of legitimacy by the newly military regimes. (Kwon, H.J., 1999) However, it appears that the Economic Planning Board was frequently responsible for the governance of social welfare programs and took part in their authentic plan through the elimination of exposure to any presidential intervention, i.e. „the control of the health insurance program of 1975 (when President Park sided with the Minister of Health and Social Affairs against the interests of the Economic Planning Board)“ (Kwon, H.J., 1999, p. 57) During the period of his presidency, „a social security system“ was caused to come into existence, „a minimum wage policy“ was put into effect, and „public medical insurance“¹² was set up. (Lee, J.C., 2003) Throughout the years of developmentalism in the 1980s, civil servant, military personnel, and (private) teachers were covered by the Korean government pension or social security insurance

¹²Public medical insurance programs were run by the Korean government in 1988 when „a universal health care system or National Health Insurance was set up“ (Lee, 2003)

agendas. Private employers contributed to their own workers. (Savada & Shaw, 1990) Furthermore, authoritarian governments in Korea were continually involved in dismiss welfare provisions for families by way of repressing dissent in labor and social movements. Economic growth and prioritizing national productivity and economic growth also indicated that virtually no redistributive policies were in place, with exception of basic education policies (Wong, 2004). (Hong, Ijin, 2024) As a result, for instance, women, who gave up their work upon marriage, became a common social phenomenon in the 1980s and 1990s. (Hong, Ijin, 2024)

Korea's "welfare system is of particular interest in this respect as it is relatively recently developed-for example, the Korean National Pension („Kukmin Yeonkum“) was only introduced in 1988 – and has been largely based on an insurance-based contributory system. This left a number of „blind spots“, in particular affecting those who had not been able to fully contribute, either because of their age, the insecure nature of their work or other family and caring responsibilities.” (Pomati & Mack, 2024)

By early 1990s, East Asian nations were aimed at „a single regional category: the Confucian welfare states from the culturalist perspective, or developmental welfare state as an extension of the logic of the developmental state.“ Both of them might be considered as a good explanation to the reasons and the condition of insisting on „low social spending.“ The first one regards „the low social spending“ as being caused by „the Confucian underpinnings“ giving a particular emphasis on the great significance of „family and community based mutual support, and non-dependence on the state.“ (Jones, 1990, 1993; Chan, A., 1996; Sung, Sirin, 2003; Peng, 2008; Lee, Hye-kyung, 2009) The second one mainly pays special attention to „political institutions of the developmental state which places policy priority on economic and industrial development, relegating social policies to a subsidiary role.“ (Johnson, 1988; Amsden, 1989; Wade, 1992; Haggard, 1990 & 2008; Kwon, Hyuck-ju, 2006; Lee, Hye-kyung, 2009) Korea, like Canada, Australia, and Japan has attempted to create and implement „a similar policy trajectory of adopting social investment discourse, language, and policies since the 1990s“. (Peng, 2011a) It is highly understood that “to increase welfare, meaning some combination of providing support for daycare, dole for the elderly, and cuts in tuition, among other things, will almost certainly mean an increase in taxes.” (Denney, 2015) However, it is highly and undoubtedly expected that Koreans will prefer to pay for less welfare, while they were encouraged to participate in the gold drive by voluntarily selling or donating their household gold¹³ rings, necklaces, and other accessories to the national treasury (Magara, 2014) to resolve the national economic crisis and overhaul the Asian financial crisis in 1997 (Lee, Jin-min, 2010). This might be the second example of the ultimate sacrifice for their country. The Korean welfare system was undeniably and certainly successful and efficacious, but conspicuously deficient in excess and extent before 1998. Consequently, the Korea state's investment in social welfare is confined to „very narrow sectors and the public provisions for social welfare, child care and elder care were almost nonexistent.“ (Peng, 2011a) In fiscal year 1990, the scope of entire social expenditures accounted for 40% by comparison with the

¹³“At the time, it was estimated that South Korean households held roughly \$20 billion in gold, in the form of necklaces, coins, bars, trinkets, statuettes, medals, pendants, military insignias and more. Most of it carried strong personal and familial significance, far beyond its monetary value. Gold, after all, has typically played an auspicious role in Koreans' personal milestones. Many families celebrate an infant's first birthday in a tradition known as *doljanchi*, during which gifts of 24-karat gold rings are customary... Companies often award retirees with gold key chains.” (Holmes, 2016)

previous year. But, it was assumed that the assistance of the handicapped, single-parent households, and the unemployed were not covered by these schemes. (Savada & Shaw, 1990)

The Korean welfare system in the era of globalization

Until 1993, „a civil government“ was not established and social welfare was not a fundamental component of the government's program of the things to be considered. At the same time, however, Kim Young-sam (1992-1998) was democratically elected president of Korea, and as a result Korea became a more democratic nation than the military authoritarian regime in the previous years. Due to the changes in the Korean politics, Korean people became aware of ambition to „social reform and the development of a welfare system“ (Lee, Y.H., 2005), and a preemptory request for social workers who extremely rose. Thus, it was imperative that the Korean government have a great emphasis on offering social services for the entire Korean population rather than only for those who were specifically placed in a position of marginal importance, i.e. „orphaned children, poor families, or people with disabilities.“ Even though the Kim Young-sam administration (1992-1998) highly focuses on the imperative of social welfare in order to establish an effective welfare programs, it was not until 1994 that the Kim administration did not consider an elaborate and systematic welfare plan. (Shin, 2001) The inception of the Citizen's Coalition for Economic Justice, known as first main Non- governmental Organizations in Korea, was regarded as one of the most significant civil society organization that struggle with welfare issues during this period. Furthermore, support from university professors („between 250 and 300 currently work with the People's Solidarity for Participatory Democracy“ being established in 1994) played a central role in developing a number of Non-governmental Organizations. (Henderson et al. 2002) The number of Non- Governmental Organizations has helped the working poor people by developing some new strategies. For instance,

“There are two kinds of roles NGOs purport to play in order to help them. One is the role of NGOs as a pressure group, which aims to put pressure on the government to reform the current social protection system so that it can provide an adequate level of social security and/ or social assistance for the poor. Most public-interest NGOs belong to this category. The other role which NGOs assume is that of a service provider and/or a fund-raiser, which collects funds and distributes them to (civil) social welfare organizations.” (Jung, Young-tae & Shin, Dong-myeon, 2002)

In 1995, the Kim Young-sam administration (1993-1998) proclaimed globalization to be an efficacious scheme for the achievement of „new Korea creation“ (Kim, S.M., 2011) and had a great emphasis on „economic growth and global competition“ that took priority over the development of social welfare. (Lee, Y.H., 2005) Shortly in the aftermath of President Kim's attendance and the United Nations Social Development Summit in Copenhagen, Denmark, in 1995, „a strategy for globalization“ was correctly comprehended by the Kim Young-sam administration (1992-1998) (Lee, Y.H., 2005), which subsequently proclaimed that it is necessary that „a productive welfare model“, attempting to be a balance between „welfare and economic development“ be adhered to „a strategy for globalization.“ (Sung, K.R., 2001) Despite a great focus of „the productive welfare model“ on the significance of welfare, the Kim administration chiefly concentrated on economic development, and „welfare benefits“ were considered as „unnecessary spending“. (Kim, S.M., 2011) This ultimately resulted in decrease in a few „welfare beneficiaries“ (from 5.5% of the total population in 1992 to 3.3% in 2006). (Chung, S.Y., 2007) A great U-turn in inequality trends has occurred in Korea since the mid-1990s. As a result, this did lead to the tremendous changes in economy, society, and politics, including the diplomatic ties' re-establishment with China 1992, being a member of the Organization for Economic Cooperation and Development in 1996, and the Asian financial crisis and the political power's change in 1997 (the social security system similar to those of developed European welfare states was established and extended and institutionalized by Kim Dae-jung (1998-2003) and Roh Moo-hyun (2003-2008). Inequality altered between the diminishing period before the mid-1990s and the growing period after the mid-1990s. (Byung et al., 2013)

The Korean welfare system during the Asian financial crisis

In 1997, Korea had experience of both the Asian financial crisis and a change of political power, which Korea experienced for the first time throughout its history. The social security system was not only set up but also expanded by Kim Dae-jung (1998-2003) and Roh Moon- hyun (2003-2008). Even though Korea institutionalized its social security system that is alike but not identical to the developed European welfare states, inequality is still tremendously growing since inequality in the market is still rather worse than before and social security is insufficiently provided by the Korean government. (Byung, et al., 2013) Kim Dae-jung (1998-2003) was elected as president of Korea when the Asian financial crisis broke out and ended in „the devaluation of local currency and increase in unemployment rates“, which led „the income gap between rich and poor“ to widen.

“Korea’s public welfare expenditures will grow significantly in the coming years as their population’s age, their old age pension programs mature and their various insurance schemes are extended to marginal occupational groups, Korea’s enterprises are challenged in their chief welfare role, namely securing employment, which will also put an extra burden on their welfare states.” (Jacobs, 1998)

In November, 1998, among many other Non-governmental Organizations attempting to provide relief assistance for the socially weak, such as the poor, the disabled, as well as the elderly, it was embarked in order to offer social relief to the poor people and the disabled. (Chung, Moo-kwon, 2010) In response to the imperative for social welfare reforms caused by the economic crisis in Korea, the Korean Confederation of Trade Unions and the Federation of Korean Trade Unions came together as a recognizable entity for a single purpose of establishing demand plan for social welfare reform policies in employment insurance, as well as the social security program. With regard to these imperatives, the Kim administration increase „its welfare budget from US \$ 5.2 million (600 billion KRW) to US \$86.2 million (10trillion KRW)“ (Lee, Y.H., 2005).

“Further, the government launched public labor enterprises (i.e., employment in the public sector for the unemployed), job training, and a loan system for the unemployed. The Kim administration extended the pension system to self-employed people, and it was nationalized in 1999. (Lee, Y.H., 2005)” (Hong, Jun-sung et al., 2013)

Despite an evidential impact of changes in political opinions during the period of Kim Young-sam administration (1992-1998) on the Economic Planning Board in planning the Employment Insurance System, policies in social areas were insufficiently implemented. (Kwon, H.J., 1999) It was not until 1998 that the Kim Dae-jung administration (1998-2003) made determined effort to deal with a difficult task, including poverty and income inequality by means of a breakneck extension of social welfare expenditures, which combined the social protection system. Moreover, the notion of „productive welfare“, which social welfare and poverty were regarded as fundamental components was enhanced by his administration.

It should be mentioned that social welfare concerns in the mid-1970s at least became a more important role for the Korean economic-advisers by comparison with the current governments.(Henderson et al. 2002)

“Under that program, social insurance coverage was extended to marginal workers in the informal sector.” (Yang, Jae-jin, 2017)

In the aftermath of the Asian financial crisis, „extensive reforms of social policies and programs“ were launched by Korea “to modernize public assistance programs, to consolidate the social insurance schemes, to expand social care services to the middle class, and to expand employment services as a part of the active labor market policies. These reforms resulted in a sharp increase in the social expenditure.” (Lee, Hye-kyung, 2009) Korea’s fundamental approach of towards social investment was very close to „a more general human capital and economic activation perspective“ or a „human capital activation“ model that was called by Peng. (Peng, 2011a) Since the end of the 1990s, (Korea Office of the President, 2000; Peng, 2011a) the slogan of „productive welfare“ was promoted by the Kim Dae-jung (1998-2003) administration and Korea turned into a breakneck welfare state during this period (Kim, Yeon-myung, 2001; Song, Ho-keun, 2003; Lee, Hye-kyung, 2004; Takegawa, 2005) through his explicit adoption of „the New Labor’s social investment framework“. (Korea Office of the President, 2000) (Peng, 2011a) The notion of „productive welfare“ has been conspicuous in terms of recognizable expenditures of „public provisions in child care, elderly care, and support programs for working parents.“ In fact, these kinds of novel social policies focusing on „children, women, and family, a policy sector that, unlike pension and health care“ has conventionally regarded as a more private matter by comparison with public policy concern. (Peng, 2011a) Unlike most advanced countries, discourses on welfare state expansion is now much in vogue in Korea. This phenomenon can be interpreted as a result of an exhaustion of developmental dictatorship model which had driven Korean people to relentless economic growth without social policies. Growing inequality and insecurity after the economic crisis in the late 1990s must have contributed to upsurge of welfare demands. Korea is expected to expand social policies as long as inequality continues to rise. (Byung et al., 2013)

It was not until 1997 that the Ministry of Health and Welfare had a main role in increasing and distributing collected funds by establishing control over „charitable contributions.“

“It became clear during the economic crisis that there was a gap in income maintenance policy in Korea. In 1997, people receiving benefits from the Public Assistance Program were 3.1 per cent of the population. (Ministry of Health and Welfare, 2000a)” (Kwon, Huck-ju, 2002)

The 1997 financial crisis stands as an equivalent of an economic and social shock in a society in which rapid economic growth had become a constant expectation for decades. In addition to this, the economy was rapidly changing: once Korea has become a manufacturing-based economy, it started to develop its tertiary sector rapidly too, which was also deemed as „more working opportunities for women in a more neoliberal and flexible labor market“. This implied „the lack of family care amidst a rapidly ageing population“. Fertility rates and marriage rates have begun falling ever since. Following the dramatic financial crisis, which had a tremendous impact on Asian markets in 1997, and in response to the demands of the International Monetary Fund in exchange for its massive loans, the newly minted, and first centre-left government, which was run by Kim Dae-jung (1998-2003), pushed for neo-liberal reforms under the label of „productive welfare, and also it stimulated „the creation of private childcare facilities with government incentives, a strategy that was followed and expanded under the following progressive presidency of Roh Moo-hyun (2003-2008) and his „Vision 2030“ plan“. (Hong, Ijin, 2024) During the Kim Dae-jung government (1998-2003) expanded promptly the Employment Insurance Program was promptly expanded and the Public Assistance Program was newly named the Minimum Living Standard and was renovated as well. Furthermore, the National Pension Program and National Health Insurance, regarding as the fundamental characteristics of the Korean welfare state, was reformed by the Kim Dae-jung administration (1998-2003). (Kwon, Huck-ju, 2002) In the aftermath of the Asian financial crisis in Korea, despite setting a restriction of the social security reforms on the set up of social safety nets, the Kim Dae-jung administration (1998-2003) highly focus on the development of a more „comprehensive social welfare system“ by designing them in a different way and expanding them through the subsequent welfare measure:

“the extension of the Unemployment Insurance Scheme to all workplaces in October 1998; the extension of the National Pension Scheme to cover the self-employed living in urban areas in April 1999; and the integration of the medical insurance societies into a unified national health system as well as the extension of the Industrial Accident Compensation Insurance Scheme to all workplaces in July 2000.” (Jung, Young-tae& Shin, Dong-myeon, 2002)

Although the Asian financial crisis obliged Korea to be a welfare state, public expenditure on family policies in Korea was rather thin up to the early 2000s. (Hong, Ijin, 2024) In 2000, the Minimum Living Standard Guarantee (MLSG) was introduced and it became one of the fundamental characteristics of the „productive welfare initiatives“. (Kwon, Huck-ju, 2002) By 2002, the number of Non-governmental Organizations now accumulates funds being collected from the public for „welfare facilities and the needy“ and distributes them to them. For instance, the Community Chest of Korea (Sahoibokji-kongdong-mokeumhoi) founded by law. It was originally based upon the „Central Association for the Promotion of Helping the Poor“ that was established in 1992 by „economic and social Non-governmental Organizations“ with the aim of increasing and distributing funds which were provided by the public for social welfare works.“ (Jung, Young-tae& Shin, Dong-myeon, 2002) The Roh Moo-hyun administration (2003-2008) was regarded as welfare-oriented with the aim of a developed welfare state in Korea and mainly attempted to promote „social integration“ and to improve „social displacement“ by assisting the progress of „distributive justice“. (Song, H.K., 2003)

“The Roh administration further expanded the welfare state through the “Vision 2030” campaign, which introduced public childcare services, long-term care for the elderly and earned income tax credits (EITC).” (Yang, Jae-jin, 2017)

Poverty reduction policies of the Kim Dae-jung administration (1998-2003) through tax reform, including increase taxes for the rich people and provision of tax benefits to the working class were expanded by the Roh Moo-Hyun administration (2003-2008). Even though the Roh Moo-Hyun administration (2003-2008) expanded the social welfare system, it did not have a fundamental role in offering social services to all citizens. Furthermore, Organization for Economic Cooperation and Development Social Expenditure Data 2003 revealed that Korea's expenditure on health services and pensions (6.9% of its Gross Domestic Product in 2005) was the lowest among thirty Organization for Economic Cooperation and Development countries. (Adema & Ladaique, 2009)

“Social investment policies became even more explicit under the Roh Moo-hyun administration (2003-08) after 2003. This has resulted in rapid expansion of early childhood education and care (ECEC) since 2003 and the introduction of Long-term Care Insurance for the elderly in 2008. Like Japan, public and policy anxiety over the rapid ageing and very low fertility in Korea in the recent years has also had an important impact on the Korean government's thinking about the social investment.” (Peng, 2011a)

Lee Myun-bak (2008-2013) brought again into prominence of conservative ideology. This has led to the ending of a progressive government over a period of ten years. The Lee Myung-Bak administration (2008-2013) ambitiously attempted to decrease in taxes and to enhance Korea's „global competitiveness by liberalization, deregulation, and free trade agreements.“ President Lee highly focused on „a growth-oriented welfare reform“ under the slogan „growth first and distribution later“, as well as established „a market-friendly welfare model“ by superseding the redistribution-based welfare model of Kim Dae-jung (1998-2003) and Roh Moo-hyun (2003-2008). (Kim, Sung-won, 2009; Hong, Jun-sung et al., 2013) At the same time, however, the financial crisis in the United States (US) 2008-2009 (at the beginning of December 2007 and at the end of June 2009) President Lee Myung-Bak (2008-2013) had to recognize that the newly-adopted welfare system that he ambitiously proceeds along the course of economic growth may possibly fail to promote self-reliance and there had been a sharp decrease in the objective rate of economic growth (from 7% to 2%). (Kim, Sung-won, 2009; Hong, Jun-sung et al., 2013)

“Building onto the idea of social investment and productive welfare, the current conservative government, led by Lee Myung-bak (2008-2013), has redoubled its commitment to social welfare expansion, contrary to the initially fear that the new government would cut social spending and reverse welfare expansion. Much emphasis has been made of the job creation potential of social care and social welfare expansion.” (Peng, 2011a)

In recent times, the welfare system in Korea has been continually influenced by „globalization, changes in the industrial structure, demographic changes (ageing population, low fertility rate) and democratization.“ Not only policy makers but also the general population did not draw enough attention to the Korea's most important struggling. (Chung, Moo-kwon, 2010) However, increase in welfare expenditures has become a crucial issue for the Korean governments. For instance,

“Many academics and policy makers in Korea today are more or less in consensus that Korea has moved into the state of welfare state after the Asian crisis.” (Lee, Hye-kyung, 2009)

Magara also emphasized that

“Park Geun-hye, the daughter of Dictator Park Chung-hee, was elected president with campaign promise of introducing a new economic policy regime focusing expansion of social welfare and economic democracy guaranteeing fair distribution of income and chaebol reforms. Her promise of policy innovation looks many respects like the „social compensation argument“.” (Magara, 2014)

Neo-liberal reforms created by Kim Dae-jung (1998-2003) and its expansion under the following progressive presidency of Roh Moo-hyun (2003-2008) ultimately encouraged „the centre-right Park Geun-hye administration (2012-2017)“s universalization of childcare services for children aged 0 to 5 years old, so that all mothers, irrespective of their working status, could get access to this government-subsidized universal policy (Yang, J., 2017; Hong, I. et al., 2024)“. (Hong, Ijin, 2024) Apart from developmental welfare system and neo-liberal welfare policy regime, Park Geun-hye administration (2012-2017) sought social democratic policies, i.e. social welfare and compensation, economic democracy, as well as chaebol reforms. A „social compensationist“ policy regime was eagerly adopted by the Park Geun-hye administration (2012-2017). (Magara, 2014) The „Wind of Free Welfare“ was that this was set to become a hot issue for the 2012 presidential election in the aftermath of a topic of hot debate on the free school lunch in 2010. During the campaign, Park Geun-hye was aimed at „economic democracy and the expansion of welfare programs as part of her platform.“ She did not pledge herself to raise taxes. Rather, she did focus on „free welfare without tax hikes (Kim, Dae-hwan, 2013) or more welfare without tax increases (Yang, Jae-in, 2017)

But, her administration did struggle with „a strong backlash from the middle class“ in the aftermath of an increase in taxes in order to fulfill her welfare solemn promises. Therefore, during the 2017 presidential election, a large number of candidates pledged themselves to extend welfare expenditures, whereas they completely keep silent on the increase in taxes and refer to merely corporate taxes briefly and without going into detail. (Yang, Jae-jin, 2017) By 2013, outperformed the case of Japan was outperformed by the Park Geun-hye administration (2012-2017)“s investments in in-kind services. A common social phenomenon in the 1980s and 1990s when women gave up their work upon marriage turned into a common social phenomenon in the 2000s when women have to „choose to give up having babies despite enjoying higher educational levels, more working opportunities in the tertiary sector, freely available childcare services, and numerous additional allowances from both the central and local government levels.“ This is considered to be „the result of a cultural clash with past traditions of family“s expectations towards women and their role in raising their children, and the functioning of the labor

market" in Korea. Past practices in male-dominated labor markets, where hierarchical structures and long working hours are still prevalent, have a heavy effect on working conditions in the Korean labor market (Tsai et al., 2016). In addition to that, the labor market in Korea is prone to be strongly dualised, with big conglomerate industry à la Samsung and regular contracts on the one hand, and Small and Medium Enterprises (SMEs) that are dominated by irregular contracts on the other (Hong, I. et al., 2023).

The millennial and Z generations of women in Korea *"now recognize how the lack of adequate protection and their overrepresentation in SMEs puts them at risk of losing their jobs if they decide to undergo marriage and childrearing - i.e. if they choose the much dreaded "career interruption" route. Considering how much more investments younger generations put in their education, and how they are unwilling to give up comparatively better jobs even in times of crisis (Hong, I., & Yang, 2022); and also regarding the relative instability of the marriage institution (with the anti-adultery law lifted in 2015, and increasing divorce rates), giving up work for taking care of families is an increasingly difficult choice to make."* (Hong, Ijin, 2024)

Not only the majority of Koreans but also the then Park Geun-hye administration (2012-2017) was doubtful about the possible expansion of social welfare. In recent times, social welfare has extremely been politicized and a political issue when it comes to distribution. Increasing social welfare, nothing but provision of daytime services, benefit paid by the government to the elderly and the unemployed, and reduction in tuition, and so on, will assuredly anything but rise in taxes. According the current Real Meterpoll (released by JTBC), Koreans may not possibly be prone to more welfare, if they have to pay for it more, even though 52.8% of Korean population tend to give a support to rise in the corporate tax rate.

To be more precisely, Koreans are highly confused about more welfare. Moreover, the Park Geun-hye administration (2012-2017) is also confused about welfare without rise in taxes or welfare with rise in taxes. But, she had to bow to the chaebols' wishes for reduction in taxes, since they invest and provide employment less than before. Shortly, not only Koreans but also the Korean government is rather confused about the rise in taxes and in social welfare. In fact, Korean politicians, party chairs, and presidents are doubtful about the right conditions for the expansion of social welfare, on account of the highly underdeveloped welfare system. Although Korean politicians and bureaucrats are prone to follow the international trend, in terms of welfare state retrenchment, Paul Pierson stated in his study on "the contemporary welfare state, the "politics of retrenchment," not expansion, is the new normal." However, they do not contemplate the current potential political power and the Korean economic structure. In Korea, most of politicians' backgrounds are comprised of white-collar jobs. Nicholas Carnes, in his book *White-Collar government: The hidden of class in economic policy making*, stated that „insofar as economic policymaking is concerned (e.g., welfare policies), those from white-collar backgrounds are going to vote for white-collar interests (i.e., against corporate tax-funded welfare expenditures).“ His focus was merely on the United States Congress, but his major context is more and less suitable to the Korean one. Despite the obscurity of the politics of taxation and social welfare, it might be seen that the Korean social welfare expenditure is not be expanded much in the near future. (Denney, S., 2015) „The national biggest influence-peddling scandals“ did lead her to „become the first president to be ousted by impeachment motion which was enacted in 2016“ that was accepted by the Constitutional Court. (Chandran, 2017) On May 9, 2017, Moon Jae-in did become the 19th president of Korea and the third Democratic Party administration in the aftermath of „the presidencies of Kim Dae-jung (1998-2003) and Roh Moo-hyun (2003-2008)“. The center-left party has advocated the establishment of a welfare state throughout Korean history. In particular, the country, as a welfare state, has developed in a breakneck and stunning manner. But, „that development“ did not remain significant by comparison with the country's economic growth. During the presidential election in 2012, he pledged himself to expand welfare expenditures during the 2012 presidential election (Denney, 2015) and a Welfare State Committee was established by the Moon Jae-in administration (2017-2022).

However, during the presidential election in 2017, he did not regard welfare as a crucial and paramount issue, although he did promise to contribute to expansion of welfare expenditures. It is expected that demand from the lowest level of a hierarchy to the top will become larger or greater over a period of time in a progressive manner in terms of an increase in income inequality and social issues. It is highly recommended that the Moon Jae-in administration (2017-2022) has to address these kinds of issues. It is very certain that it is not easy to establish a welfare state within a short time, and hence it is not expected that the country will develop as a welfare state in a rapid manner during his administration, since the state's financial capacity is far weaker than ever before. The fiscal deficit since the year 2008, when Roh Moo-hyun (2003-2008) left office, has grown. In a situation of fiscal deficits, it is inevitable that tax increases lead to an increase in public sector jobs and an expansion of social welfare. It is fortunate that Korea owns a low tax rate, so there is room for increases in taxes.

(Yang, Jae-jin, 2017)

“More recently, especially since the Asian financial crisis in the late 1990s, a number of social assistance schemes aimed at protecting those for whom social insurance has failed to provide adequate minimum incomes have been introduced. But even so, severe gaps in provision have gone unaddressed.” (Pomati & Mack, 2024)

Family cash allowances remained relatively limited until the year 2018 (Hong, I., et al., 2024). (Hong, Ijin, 2024) Korea's social policy responses to the COVID-19 pandemic had a significant role in consolidating the country's welfare state.

“In the existing literature, welfare state consolidation is regarded as the elaboration and extension of existing welfare schemes (e.g. Esping-Andersen, 1996). In this sense, the pandemic revealed critical blind spots of existing unemployment and work injury insurance and catalyzed their beefing up. However, the pandemic did not have a transformative effect of raising the existing welfare state to another level. Universalistic social assistance offered at the beginning of the pandemic was discontinued, and beyond politically flirting with catchy ideas such as „universal basic income“, no serious political attempt was made by any major political parties.” (Shim, Jae-min, 2023)

President Yoon Suk-yeol (2022-) promised to advance the freedom and welfare of the people as a way to uphold the spirit of the 1980 pro-democracy uprising in Gwangju. *“He said while political freedom in Korea has increased since the movement, there remain many people without economic freedom. We must quickly grow the economy, restore the ladder of social mobility, and raise the level of freedom and welfare enjoyed by the people, he said. By fairly sharing the fruits of growth and more closely protecting the socially weak, we must open an „age centered on the ordinary person and the middle class“ where everyone is happy.”* (Koreatimes, 2024; for more details on wages and pension, Hong, I., & Atteraya, 2013; Yang, J., 2017; Kwon, S. & Hong, I., 2019; Hong, Ijin, 2024) It is still apparent that welfare politics in Korea is „strongly driven by personal charisma and, increasingly, bashing populist discourses.“ (Hong, Ijin, 2024)

2. CONCLUSION

Throughout its history, Korea's welfare system transformed from the traditional feudal Confucian-based welfare system to the current residual welfare system. At the same time, however, it remained immature and underdeveloped. Although it seems that Korea had a great success in adopting and implementing better welfare system, Korea did not recognize that a new effective welfare system has been crucial to Korea until the Asian financial crisis broke out in 1997. Since then, Korea has expanded social welfare expenditure owing to the promulgation of many new programs and extension of the coverage of existent ones. This leads Korea to enter the early stages of a welfare state. However, there are some forces that produce the neo-feudal circumstances of the broader wealth and income inequality, the labor market flexibility, and welfare polarization and market polarization that is dominated by the chaebols and their institutions, unions, and groups representing the chaebols' interests. Moreover, the Korean people have even evaded taxes, highly weak welfare policies have led to ineffective adoption and implementation, and changes in political regimes and other external factors (particularly, globalization) that could not be avoided by the Korean governments and the Korean people, who did not recognize the global market pressures that were affected by extension of labor market flexibility which was led by globalization. Based on these circumstances, Korean citizens have been trapped in poverty, and thus Korea turned into one of the most unequal countries in the world, whereas it is referred to as an egalitarian society from 1960s to the early 1990s. As a result, Korea, without wasting any time, had to adopt a new regime and to implement new welfare policies. Newly adopted regimes were tremendously different from the Korea's previous state policy regime without recognizing whether this newly regimes were suitable to Korea's social, political and economic structure and characteristics and giving economic growth preference over the greater welfare expenditures was not a good solution to the Korean governments' obstacles and issues.

Furthermore, the Korean governments' uncertainty about the greater welfare expenditures, the state-intervened social welfare policy, and the current residual model have led the Korean people to prefer more control over their money and lives instead of paying more taxes. It is essential and crucial that Korea expand social welfare expenditures in order to protect working class and its families (i.e. low-skilled workers, irregular workers, workers in the small and medium-sized enterprises), to redistribute wage incomes, and to diminish income inequality through welfare institutions, which may contribute to labor market flexibility (i.e. medical, education, job training for new jobs, as well as unemployment). Instead of adopting and implementing the newly social welfare system or program, it is important that Korea do some changes and developments under new government programs and policies by preventing the Korean people from tax evasion or encouraging them to pay more taxes. This might be regarded as one of the most effective solutions to guarantee the welfare and life-

time well-being of all citizens and to become a mature welfare state. Furthermore, if a combination of the idea of the (almost) ideal Confucian-influenced welfare state philosophy with the idea of *min pen* and deliberative democracy that could be related to the newly regimes and reforms that are compatible with its social, political and economic structure and characteristics could be created by the Korean state, it would establish its own unique effective welfare state to become more benevolent and prevent its people from poverty and inequality. The future Korean government will take more responsibility for being resolute and transparent and being committed to conducting a free government that not enable the *chaebol* not only to function as a main neo-feudal market actor and one of the significant actor of illicit activities that affect adversely the Korean typical open economy depending on exports and imports, but also to escape higher tax rates and additionally for enabling the Korean people to overcome their biased notion that welfare expenditures are not capable of producing and are afflicted with consumption and that paying more taxes is related to more control over their money and lives. For Koreans, their devotion and allegiance to the state and self-abnegation did become preeminence and predominant throughout its history, when it comes to the national interest. However, it certainly seems that changes and circumstances in the Korean society will lead the current and even future government to face more challenges with the implementation of policies that are related to tax evasion and more taxes.

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