

rose from 26.3 years in 1993 to 28.6 years in 2003 (KNSO, 2004).

Marriage composition is also regarded as an important intermediate variable of reproduction. The proportion of married tends to decline as age at marriage rises. According to the 1985 census, 79.6 percent and 91.4 percent of men and women aged 30-34 respectively were married. At the turn of the twenty-first century, the proportion of those married has dropped to 70.6 percent and 86.9 percent respectively.

Decrease in the proportion of those married has been a significant factor behind the recent decline of fertility in Korea. It is suggested that the lack of stable jobs for young men has been an important reason for remaining single since the mid 1990s. Decreasing confidence about their future employment prospects has kept young people from their entry to marriage and reproduction. For women, increased opportunities in education and paid employment also have contributed substantially to the decrease in the proportion married.

Marital composition is also affected by marriage dissolution. Recent findings suggest that changing value orientations of family and economic hardship resulted in an increasing incidence of divorce. This is particularly true after 1990. The crude divorce rate had risen steadily from 0.4 in 1970 to 1.1 in 1990. The increasing pace of the crude divorce rate jumped remarkably after that, and reached 3.5 in 2003.

Without a doubt, decreased family formation and increased family dissolution have been key factors of recent fertility decline. Results from decomposition analyses of changes in the TFR show that the effects of changes in marital composition and age at marriage on shaping the tempo of fertility decline turn out to be much greater after 1990, compared to the period of 1960 to 1985. It is also found that the increasing incidence of divorce also contributed to the fertility decline after 1990, while its impact was not substantial in the period of the first fertility transition (Kim, 1992; Jun, 2004).

4) Gender Equity Orientation and Fertility Decline

The basic idea about the second demographic transition is that fertility decline has been driven by growth of values and attitudes regarding individual self-realization, satisfaction of personal preferences and freedom from traditional forces of authority (McDonald, 2002). In particular, the gender explanation of low fertility has received

attention in recent studies (Chenais, 1998; Tsuya, 2000; McDonald, 2000, 2002).

Korea has experienced substantial improvements in gender equity during the past two decades.⁴ However, as McDonald (2000) indicates, rigidly differentiated sex roles for childrearing still prevail inside the family. Little or no provisions are made for women to increase compatibility between working and childrearing. Young Korean women are well aware that their career and self-realization will have to be compromised once they get married and have a baby. Therefore, there has been a tendency among young Korean women to consider marriage as a compromisable “option” rather than a “mandatory” process in the course of their life. More and more young women with high education and economic capability for self-support tend to postpone or avoid it. A similar explanation can be applied to the very low fertility of Japan and the Southern European countries including Italy, where strong family systems are maintained.

It is postulated in this paper that recent trends in family formation and dissolution, contributing to extremely low fertility, have been very much influenced by gender equity orientation. It is also hypothesized that gender equity orientation also affects marital fertility, and that the motivations for small family would be stronger for women with a gender equity orientation. Young couples are now less likely than the older generation to accept the ideology of patriarchy and traditional gender roles and, as a result, their attitudinal and behavioral expressions of the desired number of children and son preference are getting lower than ever. Consequently, increasing trends in gender equity in education and market employment, and extended control over childbearing by women are responsible for the fertility decline from low levels to very low levels during the past two decades in Korea.

Another distinctive feature of fertility related to the value orientation of Koreans is the emergence and gradual disappearance of son-selective reproductive behavior since the mid 1980s. There is little doubt that motivations for sex-selective reproductive behavior stem from strong son preference along with gender discrimination against women. The risk and insecurity that patriarchy imposes on women represents a powerful systematic incentive for sons. To accommodate a strong son preference and

⁴ However, there is still a wide gender gap in access to education and employment. According to UNDP (2004), the gender-related development index (GDI) and the gender empowerment measure (GEM) are turned out to be very low in Korea.

low fertility at the same time, sex ratio at birth rose remarkably in the second half of the 1980s and the early 1990s. As the tide of gender equity orientation is prevailing recently, young couples are less likely to be motivated strongly for son-selective reproductive behavior.

Son preference also plays an important role in determining family size. It has been pointed out that strong son preference might provide a serious barrier to the attainment of low fertility (Lee, 1982; Park, 1983; Arnold, 1985; Arnold and Liu, 1986). However, this concern has proven to be groundless. Results from simulations indicate that son-selective reproductive behaviors raise sex ratio at birth, and, at the same time, play a role in lowering the level of fertility (Kim, 2003). Despite strong son preference, Korea has achieved extremely low fertility, as have a number of East Asian countries such as China, Taiwan, and Hong Kong (United Nations, 2002).

4. Implications for Policy Directions in Korea

1) Two Policy Directions

Although Korea is projected to experience population decline from the early 2020s, the likelihood and degree of further decline in fertility is a matter of some controversy. Many demographers predict the perpetuation of the lowest-low fertility in the coming decades. Based on the fact that the desired number of children has been around 2, others hold the view that the current level of fertility is a transitory phenomenon. This paper does not claim to be exhaustive concerning the prospects of fertility development, or the premise that lowest-low fertility is not desirable for Korean society. It rather intends to highlight some of the policy directions and to drive some policy implications from the analysis of causal mechanisms of fertility transitions.

The twenty-first century is expected to witness even more rapid population aging in Korea than the previous century. The speed of the aging process is mainly determined by the steepness of the fertility decline. Therefore, a major policy option for an aging society with a declining population is to include programs to raise the fertility level. Other possible measures to cope with the labor shortage are to better utilize the female labor force, and to accept foreign workers. Finally, population policy responses also

comprise efforts to expand employment opportunities for the elderly by eliminating labor market impediments.

No single policy option alone can ameliorate the current demographic situation. The Korean government, therefore, intends to address as many of the above policy options as possible. Among them, two policy directions and related options deserve more discussion.

(1) Pro-natal Policy

In response to very low levels of fertility and the socioeconomic consequences of the resultant population aging, in 2004, the Korean government declared a shift to pro-natal policies aimed at boosting the low level of fertility and delaying the speed of aging. Rational decision-making theory implies that policies geared to raise the psychological/economic benefit thresholds or reduce the economic costs of children are likely to have a positive impact on fertility. Since the former is not amenable to policy, major policy options focus on helping families by providing child allowances, childcare leave, a childcare support system, tax exemptions based on the number of children, etc.

Another set of policy options is to consolidate women's role as mothers and workers by improving the flexibility of the labor market. A new policy direction is to improve the social status of women and gender equity, and to guarantee the involvement of fathers in childcare and rearing responsibilities. Improving the status of women and gender equity through effective programs of education, employment and mass communication in all spheres of life is also essential for the long-term eradication of son-selective reproductive behavior.

(2) Female Employment Policy

In the past several decades, there has been a steady increase in female participation in the labor force in Korea. The labor force participation rate for females has increased to 48.9 percent by 2003, up from 42.8 percent in 1980 (OECD, 2004). However, these female economic activity rates have remained at a far lower level compared to the figures of their male counterparts. A large portion of highly educated women still do not get appropriate jobs because of gender discrimination and become housewives.

In order to augment female employment, the government is currently taking stronger measures and regulations to create a more favorable working environment for women. A high priority is to provide childcare facilities for female workers as well as to eliminate gender discrimination in the workplace. More flexible working hours and short-term leave for family-related purposes could be another set of policy options for women with a baby.

2) Comments and Recommendations for Policy Directions

Now, a question could be raised. Would the above policy directions and options be effective for fertility change in Korea? Without a doubt, the policy directions mentioned above and related programs would be helpful in improving the childcare environment as a welfare policy. It is argued in this study, however, that the above approach as a pro-natal policy will probably not be very effective.

Fertility has continued to decline recently in Japan and several European countries in spite of their governments' economic support for childcare, family-friendly workplace arrangements, and the provision of more flexible work opportunities for mothers. Empirical evidence shows that direct economic incentives are not effective in advanced countries (Gauthier and Hatzius, 1997).⁵ Compared to Japan and European countries, the coverage of childcare facilities, child allowance and income tax exemption in Korea are very limited. The Korean Government's economic support for childcare is far from sufficient to reduce extremely high direct and indirect costs of childrearing substantially, and thus to have a significant influence on fertility.

In fact, most of these pro-natal policies are actually pro-rearing policies that aid couples who already have children. The meager amount of public funds that each young couple can receive cannot be compared to the staggering cost of raising a child in Korea. It should be noted that the cost of education is already the largest single expense for most Korean families with school children.

Evidence indicates that, in several European countries including France, policies increasing the compatibility of women's work and childcare may have been effective in

⁵ However, economic support for childcare in France and Luxemburg is argued to have led to a relatively higher fertility although the causal relationship is difficult to prove.

increasing the level of fertility (Gauthier and Hatzius, 1997). However, the effectiveness of a policy depends largely on its relevance to the country's socioeconomic context. It is worth noting that the rapid pace of population aging in Korea over the coming decades is expected to force more and more women into the labor market and cause a serious drain in the public budget to support the elderly. It is thus not reasonable to assume that public transfers of resources will be enough to increase childcare facilities to a sufficient level in the years to come.

The most significant factor in the recent decline of fertility is the serious decrease in births among young people in their twenties. Therefore, the main goal of the pro-natal policy should be to motivate these young people to get married and to have children at earlier ages. The current programs should be better designed for this specific age group since evidence shows that couples in their thirties show not only a higher fertility rate compared to younger couples but also a slight rise in their fertility rate in the past decade (Figure 7).

The current government expenditure for its pro-natal policies cannot be a motivating factor for young couples who feel insecure not only about their current job situation but also about the future economy of the country. Furthermore, the government's commendable efforts to correct gender discrimination against women in workplaces will surely help women to earn higher wages and to be promoted further in their careers than they were allowed previously. However, it will not motivate career minded young women who want to enjoy financial independence and freedom from traditional childrearing responsibilities to marry early and have children. Under current circumstances marriage and childrearing are not very attractive "options" for them.

To encourage young people to marry early and have children, the key problem of providing young workers a greater sense of job security must be solved. That means rather than spending limited public funds to support a variety of ineffective programs that does not attack the core of the low fertility crisis, the government must concentrate its resources to achieve a solid economic recovery and steady growth in which young people can be convinced to feel secure about their financial future. The clear and unequivocal success in economic recovery is the most important factor in improving the Korean fertility level. Unless economic recovery is achieved along with overall improvements in the educational system as well as men's acceptance of equal

responsibilities in house keeping and childrearing, Korean fertility will continue to remain at an extremely low level and population decline will be unavoidable in the near future.

5. Summary and Concluding Remarks

This paper has tried to shed light on the principal factors that have affected the fertility transition of the Korean population and the attainment of the lowest-low fertility. The main objective has been to develop theoretical explanations of why and how Korea passed through the first fertility transition from 1960 to 1985 and the second fertility transition from 1985 to the present. It is argued in this paper that the causal mechanisms of the two transitions are different from each other. Two conceptual schemes for the first and the second fertility transitions are developed. Attention is also focused on driving plausible recommendations for Korea's policy directions and responses to recent demographic situations.

The first fertility transition was explained as a function of five factors: socioeconomic changes, technological diffusion, migration, mortality decline and family planning programs. It is widely accepted that the first fertility transition was a joint product of socioeconomic changes and family planning programs. Although the decline in mortality preceded the decline in fertility, it appears that mortality did not play a major role in triggering the onset of the first fertility transition. It was also found that Koreans responded to population pressure by migrating, delaying marriage, and having abortions, and then, only when these options were exhausted did marital fertility sharply decline since the early 1960s.

The concept of the second fertility transition was adopted to provide explanations for the establishment of the lowest-low fertility in Korea. Socioeconomic changes, globalization and the accompanying changes in the labor market, family formation, and gender equity orientation are stressed as the major underlying forces for the second fertility transition since the mid 1980s. Unlike the conceptual model for the first fertility transition, government-organized family planning efforts, migration, and mortality decline in the 1980s are not emphasized as major determinants of the recent decline of

fertility to way below the replacement level.

Socioeconomic changes, globalization, insecurity in the labor market, and gender equity orientation have played a dominant role in the delay of initial family formation and timing of first birth. Mainly due to labor market deregulation after the Asian economic crisis, employment has become much less secure for young people at the ages of career formation and marriage. Since the mid 1990s, high unemployment due to a poor economy and an accompanying high sense of insecurity among young people have resulted in delay of marriage and a decreasing proportion of those married which in turn, have affected fertility decline. Along with changing value orientation of family, economic hardship is also responsible for an increasing incidence of divorce. It is noteworthy that the contribution of rising age at marriage to the decline of fertility has been increasing since the mid 1990s. It is also argued that increasing trends in gender equity in education and market employment, and extended control over childbearing by women are responsible for recent trends in family formation and dissolution as well as marital fertility.

The Korean government is currently taking a step further from the simple discontinuation of its population control policies to pro-natal policies encouraging more births: extending childcare leave and child allowances, increasing coordination between childrearing and the employment of women, etc. However, the pro-natal policies will probably not be very effective. The small amount of economic support for childcare and some family-friendly workplace arrangements for mothers are not likely to have a significant influence on young couples who have strong desire to maintain a reasonable standard of living in a very competitive society with high educational costs. To encourage young people to marry early and have children, a greater sense of job security along with a sure economic recovery would be more effective. Ultimately, unless overall improvements in the educational system as well as in the security of the labor market happen, Korean fertility will continue to remain at an extremely low level and population decline will be unavoidable in the near future.

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**The State and Families in South Korea's *Compressed Fertility Transition*:
From Demographic Success to Socioeconomic Dilemma**

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The State and Families in South Korea's *Compressed Fertility Transition*:

From Demographic Success to Socioeconomic Dilemma

Chang Kyung-Sup

1. Compressed Development, Family Life, and Fertility Change

South Korea entered the 21st century amid a duly expected but still unaccustomed policy concern. South Koreans have intensely yearned for catching up with advanced western countries in economic terms. So far, such a pursuit has been impressively successful despite a national financial breakdown in the late 1990s. However, their catching-up has been no less rapid in many non-economic aspects. In particular, the plummeting fertility rate has already made South Koreans a population less reproductive than most of the western countries. As bluntly shown in their total fertility rate of 1.17 in 2002 (see Table 1), the so-called fertility transition of the South Korean population has been so dramatic that it even dwarfs the famous (or infamous?) “induced” fertility transition in China (cf. Chang, 1990). Serious suggestions for a pro-natal social policy are being made and discussed in this society where many remnants of the family planning programs are still tangible. For the burdens of labor shortage and elderly support are predicted to become extremely heavy before too many years. Perhaps, the policy transition from fertility discouragement to fertility encouragement is likely to become another area in which South Koreans are to break the world record in terms of rapidity.

Such a drastic fertility decline, among many more indications of *defamiliation* (see Section 4 of this paper), is quite puzzling if one considers the tenaciously strong attachment of South Koreans to

their families in social, economic, and even political life.¹ Despite the explosively rapid economic transformation and social change in recent several decades, the family-centeredness of South Koreans is known as an enduring trait. During the tumultuous processes of colonization, war, military rule, and industrialization, South Koreans could not turn to the state or communities for material, physical, and psychological protection. Instead, they have coped with various crisis situations, explored new opportunities, and maintained social identities only through familial support and cooperation. The familism of South Koreans, therefore, has been a crucial mechanism for managing rapid social and economic change. Then, why holding back familial procreation so drastically?

In this paper, I will show that the very family-centeredness of South Koreans has been responsible for their internationally unparalleled fertility decline. It is true that there exist many 'usual' factors for fertility decline in South Korea. For instance, the extremely rapid industrialization has drawn rural population to urban factories, offices, shops, and schools, and thereby transformed them into modern proletarian or semi-proletarian classes whose family situation, according to John Caldwell (1982), makes high fertility an irrational option. The speed of urbanization (and, concomitantly, proletarianization) is yet another area in which South Koreans have surpassed most other nations (see Table 2). Besides, the improvement in the educational level and quality of population has been no less drastic. In particular, women's high education has inevitably made their fertility, and sometimes even their marriage, a serious personal sacrifice. These usual factors alone, however, cannot explain South Koreans' plummeting fertility. Nor can equally rapid or serious changes in other family-related aspects of life be explained by them. Divorce, separation, runaway, late marriage, and single life have been increasing, all at alarming rates. These are, like shrinking fertility, symptoms of the overburdening of family relations and responsibilities.

¹ Dafamiliation refers to social tendencies and behaviour to avoid, postpone, reduce, escape, and/or break familial relationships.

The family-centered life of South Koreans does not necessarily presuppose a certain line of common family ideology. On the contrary, as a result of explosively rapid social and economic transformations and overwhelming western influences (Chang, 1999), the values and norms of South Koreans about family life and relationship are more diverse and complex than those of most other nations. South Koreans have been almost simultaneously exposed to Confucian familism, instrumental familism, affectionate familism, and individualistic familism. Different generations, regions, genders, and educational backgrounds have been responsible for different degrees of accommodation to each of these family ideologies. Consequently, not only the entire society but also each family has to confront, on the one hand, the psychological tension and conflict caused by the maladjustment among contradictory family ideologies and, on the other hand, the functional burden ensuing from the diverse familial roles and responsibilities prescribed in such multiple ideologies.

It seems that the South Korean government, which is considered one of the successful implementers of family planning, has rather exacerbated the psychological and functional difficulties of families. It has been a loud advocate of familism, however, in various contradictory ways. On surface, the successive administrations tried to preserve the Confucian nature of families so that they could rely on familial functions and duties in social support and political control. In reality, however, the ideological and functional demands of the state on private families directly reflected and then reinforced the plural family ideologies of Confucian, instrument, affectionate, and individualist familism. Nevertheless, there has been one coherent feature of the family policy of the state. It has always encouraged private families to fulfill all the functional burdens of feeding, protecting, educating, disciplining, consoling, supporting, and even nursing its citizens without demanding state assistances. In this way, fertility decline, along with other tendencies of defamiliation, has been facilitated apart from the direct effect of family planning programs. Now, as a fundamental and drastic turnaround in

population policy is widely and publicly discussed, any of its prospective pro-natal policies is not likely to become terribly affective unless the multi-faceted and protracted functional dependence of the state on private families is reconsidered seriously.

2. Korean Families under *Accidental Pluralism* and *Functional Overloading*

The existence of diverse family ideologies in a family does not necessarily constitute a social problem. It could rather serve a valuable resource for producing lively family culture. However, the emergence of the diverse family ideologies in South Korean society has been an accidental outcome of rapid macro social, cultural, and economic changes. Thus, the family ideologies of South Koreans reflect a sort of *accidental pluralism*. Originally, pluralism is a political philosophy of Western democracy for pursuing a progressive coexistence of different or competing social elements on the basis of mutual tolerance and recognition. The diverse family ideologies of South Koreans are not based upon pluralism as a progressive principle of social and familial integration. Their diversity in family ideology is the result of individual experiences of a long and abrupt series of historical incidents and social transformations including colonial rule, war, Westernization, industrialization, urbanization, commercialization, informatization as well as traditional revival. Although some of these processes have been voluntarily pursued, the overall nature of the ideological transformation of South Korean families is far from harmonious or stable.²

² Besides the explosive and complex social changes, the rapid lengthening of life expectancy has facilitated the plurality of family ideologies. That is, the family ideologies emphasized by old generations, such as Confucian familism and instrumental familism, have extended social life spans thanks to the impressive expansion of old age (Chang, 2001b). Simultaneously, affectionate familism and individualistic familism have rapidly spread among middle agers and youth, so that South Korea has become an arena for the coexistence of family ideologies of traditional, modern, Asian, and Western origins.

In the following, let me briefly explain the characteristics and backgrounds of each family ideology and the functions and responsibilities it attaches to families.³ First, the kernel of Confucian familism consists of the modern inheritance of the traditional family values and norms of the Chosun era (Choe, 1991). This family ideology, centered on the moral hierarchy and support relationship between different genders and generations, still exerts the most dominant influence in cotemporary South Korea. Despite various significant symptoms of weakening and deterioration, its influence on the relationship between parents and children and between husband and wife is critical.

There are two historical factors that make the influence of Confucian familism pervasive but problematic: first, Confucianism, including its family ideology, was a limited class phenomenon monopolized by *yangban* aristocracy and, second, its modern sustenance has not been in par with the nature of macro social change. As the Confucian family rituals and relationships required heavy cultural and material resources unbearable for ordinary and lowly classes, it enabled learned and landed aristocracy to legitimate their morally coated class domination. Interestingly, Confucian familism was universalized society-wide after the traditional class system was dissolved in the nineteenth century. This trend reflected the aspiration of previously ordinary and lowly people for assimilating the exclusive class culture of their old day masters (Kim, 2001). Besides, after colonial devastation and war, Confucianism was utilized in promoting social integration and stability on the basis of familial unity. As the state and local communities were in disarray due to repeated political and military conflicts, private families were entrusted with full responsibility for protecting and controlling individuals.

³ This part of the paper is summarized from my earlier article, "Compressed Modernity and Korean Family: Accidental Pluralism in Family Ideology" (*Journal of Asian-Pacific Studies*, September 2001, pp.31-39).

Instrumental familism is a sort of life philosophy that has evolved out of various family-reliant survival strategies of South Koreans in the turbulent twentieth century. As the dissolution of the traditional order, the successive colonial rule by Japan and the United States, and the Korean War destructed stable state governance and communal order, South Koreans had to turn to their families alone for personal protection and social achievement (Chang, 1997b). Even after the initiation of full-fledged industrialization, South Koreans continued to develop and manage their industrial system in a family-reliant manner. For instance, the formation of educated and skilled labor force has been possible not because of active governmental and corporate investment in human capital but because of ordinary citizens' excessive zeal for their own and their children's education. A majority of the widespread small-scale commercial and industrial operations have been family-funded and/or family-staffed ventures. *Chaebol*, the largest business organizations, are also family-controlled both in ownership and management (Cho, 1991).

South Koreans have mobilized their family resources and kin networks for their social advancement, material achievement, and even political success. A good family is one that can meet such social, economic, or political needs of its members. That is, they came to develop an ideology that the family has to function as an instrument for its members' social competition for status, wealth, and power. If a family fails to serve that purpose, it becomes an embarrassing evidence of inferiority. As an inevitable cost of instrumental familism, many South Korean families tend to sacrifice normal domestic life for the sake of their members' success and achievement in society. As family relationship is confirmed not through harmonious and gentle domestic interaction but through strategic support for social competition, home has been reduced to an empty shell. On the other hand, the mobilization of family resources and kin networks often infringes upon fair social, economic, and political order by nurturing corruption, speculation, and collusion in various areas of society (Chang, 2004).

Affectionate familism was originally established as the psychological protective function of the family was emphasized in the process of capitalist industrialization in the Western countries (Shorter, 1975). The emergence of large-scale industrial capitalism in which production was fulfilled in big factories and management in big offices resulted in the economic and social demise of many bourgeois entrepreneurs who used to depend on familial economic organizations. This trend triggered social effort for reestablishing the family as an arena for emotional protection of people (Zaretsky, 1973). They began to expect the family to provide psychological buffers against rampant suppression, exploitation, and alienation in industrial society. Women were supposed to harbor the emotional integrity of the family. Afterwards, the prohibition of child labor and the protection of maternity made children and women stay home, and the improved income level of male proletarian breadwinners stabilized the material condition of domestic life. These trends facilitated the spread of affectionate familism as a family culture of middle class proletariat.

In South Korea, rapid industrialization and economic growth allowed a speedy expansion of middle class workers who accepted affectionate familism as a main family ideology. Also, as most of the highly educated women remained home after marriage, they were exposed and accustomed to Western affectionate familism disseminated by mass media. When affectionate familism is compared with Confucian familism, the former concurs with the latter on its emphasis on women's domestic status and homemaker role, but differs from the latter on its emphasis on the emotional union between parents and unmarried children excluding elderly grandparents. When affectionate familism is compared with instrumental familism, the former differs from the latter on its emphasis on the quality of domestic life as the core standard of a good family. These differences of affectionate familism from Confucian and instrumental familism often lead to intergenerational and spousal conflict.