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ARTICLE

Status and features of the Korean labor market (2008-2018)

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Abstract

This article examines the status and structural characteristics of the Korean labor market since the global financial crisis in 2008. Even though the Korean labor market was resilient in the wake of that crisis, there are issues that require attention, which is including high earnings inequality, an aging labor force, increasing non-regular jobs, and rising youth unemployment rates. The Korean workforce has clearly divided not only by type of employment, but also by size of firms (large corporations and SMEs). Therefore, the main problem of employment is basically originated from the deepening dual structure in the labor market. This paper presents a brief characterization of the Korean's labor market, analyzing in detail the main employment indicators. It also analyzes wage gap, and working conditions by employment type and firm size, focusing on the dual labor market. Additionally, examines the current situation of platform work, which has emerged as a major area of the labor market, and the trend of minimum wage, which has fluctuated in the last two years.

Keywords: Labor market; Labor market segmentation; Minimum wage; Korea.

JEL: J2, J3, J5, J6, J8.

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Situação e características do mercado de trabalho coreano (2008-2018)

Resumo

Este artigo examina a situação e as características estruturais do mercado de trabalho coreano desde a crise financeira global em 2008. Embora o mercado de trabalho coreano tenha sido resiliente após essa crise, há questões que requerem atenção, incluindo a elevada desigualdade de rendimentos, uma força de trabalho envelhecida, o aumento de empregos atípicos e o aumento das taxas de desemprego juvenil. A força de trabalho coreana dividiu-se claramente não apenas pelo tipo de emprego, mas também pelo tamanho das empresas (grandes corporações e PMEs). Portanto, o principal problema do emprego se origina basicamente do aprofundamento da estrutura dual no mercado de trabalho. Este artigo apresenta uma breve caracterização do mercado de trabalho da Coreia do Sul, analisando em detalhe os principais indicadores de emprego. Analisa também as diferenças salariais e as condições de trabalho por tipo de emprego e tamanho da empresa, com foco no mercado de trabalho dual. Além disso, examina a situação atual do trabalho em plataformas digitais, que emergiu como uma área importante do mercado de trabalho, e a tendência do salário mínimo, que flutuou nos últimos dois anos.

Palavras-chave: Mercado de trabalho; Segmentação do mercado de trabalho; Salário mínimo; Coreia do Sul.

Situación y características del mercado de trabajo coreano (2008-2018)

Resumen

Este artículo examina la situación y las características estructurales del mercado de trabajo coreano desde la crisis financiera global en 2008. Aunque el mercado de trabajo coreano haya sido resiliente después de esta crisis, hay aspectos que requieren atención, incluyendo la elevada desigualdad de los rendimientos, una fuerza de trabajo envejecida, el aumento de empleos atípicos y el aumento de las tasas de desempleo juvenil. La fuerza de trabajo coreana se dividió, no solamente por el tipo de empleo, sino también por el tamaño de las empresas (grandes corporaciones y Pymes). Por lo tanto, el principal problema del empleo se origina básicamente en la profundización de la estructura dual en el mercado de trabajo. Este artículo presenta una breve caracterización del mercado de trabajo en Corea del Sur analizando detalladamente los principales indicadores del empleo. Analiza también las diferencias salariales y las condiciones de trabajo por el tipo de empleo y el tamaño de la empresa, enfocado en el mercado de trabajo dual. Así mismo, examina la situación actual del trabajo en plataformas digitales, que emergió como un área importante del mercado de trabajo, y la tendencia del salario mínimo, que fluctuó en los últimos dos años.

Palabras clave: Mercado de trabajo; Segmentación del trabajo; Salario mínimo; Corea del Sur.

Situation et caractéristiques du marché du travail coréen (2008-2018)

Résumé

Cet article examine la situation et les caractéristiques structurelles du marché du travail coréen depuis la crise financière mondiale de 2008. Bien que le marché du travail coréen ait bien résisté après cette crise, certains problèmes doivent être pris en compte, notamment l'inégalité des revenus, une main-d'œuvre vieillissante, la hausse des emplois atypiques et le taux de chômage des jeunes. La main-d'œuvre coréenne était clairement divisée non seulement par le type d'emploi, mais également par la taille des entreprises (grandes, petites et moyennes entreprises). Le principal problème de l'emploi découle donc essentiellement de l'approfondissement de la double structure du marché du travail. Cet article présente une brève caractérisation du marché du travail sud-coréen, en analysant en détail les principaux indicateurs de l'emploi. Il analyse également les différences de salaire et les conditions de travail par type d'emploi et taille d'entreprise, en se concentrant sur le double marché du travail. En outre, il examine la situation actuelle du travail sur les plateformes numériques, qui est devenu un secteur important du marché du travail, et l'évolution du salaire minimum, qui a fluctué au cours des deux dernières années.

Mots clés: Marché du travail; Segmentation du marché du travail; Salaire minimum; La Corée du Sud.

Introduction

The dual structure of Korea's labor market has been one of the nation's most significant problems since the 2000s. The labor market is mainly divided between large corporations and small and medium-sized enterprises (SMEs), or between regular and non-regular employment, in terms of the widening wage gap and discrimination (Jeon *et al.*, 2018). This is because the government has attempted to deregulate the labor market since the 1990s to increase employment flexibility, while employers have diversified their corporate strategies to maximize short-term profits by reducing labor costs (Y. Kim, 2007). In fact, the Korean government took a variety of steps to increase labor market flexibility as part of neoliberal economic reforms taken to overcome the financial crisis in 1997, as required by the International Monetary Fund (Shin, 2013). In 1998, the *Act on the Protection ... of Dispatched Workers* was enacted, which allowed "Temporary agency work", and codified dismissal for managerial reasons into law.¹ In the 2000s, the flexible working hours system, which was limited to no more than one month, has been expanded to a maximum of three months. At the end of 2006, the *Act on the Protection ... of Fixed Term and Part-Time Workers* was enacted to limit the use of fixed-term employees to two years and reduce employment discrimination, but implementation in practice was not in accordance with the purpose of the law.² A series of labor market reforms have resulted in a weakening "core" of regular workers, who are protected by lifetime employment and benefit from seniority-based pay, features that have previously been a major part of Korea's labor market (Hwang, 2009). Transformation of the Korean labor market and the proliferation of new types of non-regular employment in the 2000s' have resulted in deepening inequality and poverty (Shin, 2013), and the rapid expansion of short-term contracts and part-time employment, outsourcing part of the work to service workers and dispatch workers (Hue, 2007).

In Korea, the primary labor market, which holds a key position, is defined as regular employment in conglomerates and the public sector, which accounts for approximately 4.47 million workers as of 2019: 23.4% of wage workers and 19.3% of employed persons (Y. Kim, 2019). On the other hand, in the secondary labor market, almost 80% of workers work with SMEs, where employment is characterized by low wages, poor working conditions, and instability (Cheon *et al.*, 2018). Hence, the widening income gap and discrimination between

¹ The Act on the Protection, etc. of Dispatched Workers was enacted in 1998, and regulates how workers may be hired by a dispatching (sending) company for work at a third party (using) employer. The owner of a dispatching business dispatches workers while the recipient company uses the dispatched workers for a maximum of 2 years.

² The Act on the Protection, etc. of Fixed-term and Part-time Workers was enacted on 21 December 2006. The term "fixed-term worker" refers to an employee who has signed a labor contract for a maximum fixed period of 2 years.

workers by employment type and firm size (Jeong *et al.*, 2017). In recent years, technological changes symbolized by the “Fourth Industrial Revolution” and platform digital work are emerging as important issues in the labor market. Low-wage, non-regular workers include not only small, self-employed businessmen, franchise owners, and workers in special types of employment but also those in new types of employment, such as “crowd workers” and “mobile app workers”. In other words, the emergence of platform work (which involves working through mobile phone applications and other digital platforms) is causing great concern due to the possibility that it will dismantle standard forms of employment. For this reason, there are views that various government-level measures are needed to protect fundamental labor rights and see social safety nets provided in platform work (Hwang, 2017).

The purpose of this paper is to provide an overview of the status and characteristics of the recent Korean labor market since the 2008 financial crisis, reviewing the key employment indicators on an itemized basis. It also analyzes wages, and working conditions by employment type and enterprise size, focusing on Korea’s dual labor market structure. This paper briefly examines the current situation of platform work, which has emerged as a major area of the labor market, and the minimum wage trend, which has fluctuated in the last two years. This paper uses data collected from the EAPS (Economically Active Population Survey) published by Statistics Korea, whose target of analysis was limited to persons aged 15 years of age or older, as well as OECD statistics on persons 15- to 64-year-olds.³

1. Status of employment

Employment trends

Table 1 shows that the economically active population marked 27,582,000 in December 2018, while the rate of labor force participation stood at 62.2%. The number of employed persons totaled 26,638,000 persons, while employment-to-population ratio recorded 60.1%. The number of unemployed persons totaled 944,000 persons in 2018, or 3.4%. Figure 1 shows that the growth rates of the labor force and the growth rates of the employed population were higher than the growth rates of the working age population in the period 2010-2017.

³ The Economically Active Population Survey (EAPS) is a survey begun in 1962 to provide information for the Five-Year Economic Development Plans on a quarterly basis. Since July 1982, the Korea National Statistical Office has conducted the Survey monthly. Currently it surveys about 30,000 sample households (about 0.2% of the Census of Population and Housing) and records information regarding employment status, including education, labor force participation, working hours, and job search activities.

Table 1. Major employment indicators. South Korea: 2018.

Indicator	Number or percentage	
Population aged 15 years and over (1,000 persons)	44,316	
Economically active population (1,000 persons)	27,582	
Economically inactive population (1,000 persons)	16,733	
Labor force participation rate (%)	62.2	
Employed persons (1,000 persons)	26,638	
Unemployed persons (1,000 persons)	944	
Unemployed rate (%)	3.4	
Employment rate (%)	15 years and over	60.1
	15~64 years	66.5

Source: Korean National Statistics (KOSIS), Economically Active Population Survey in December 2018.

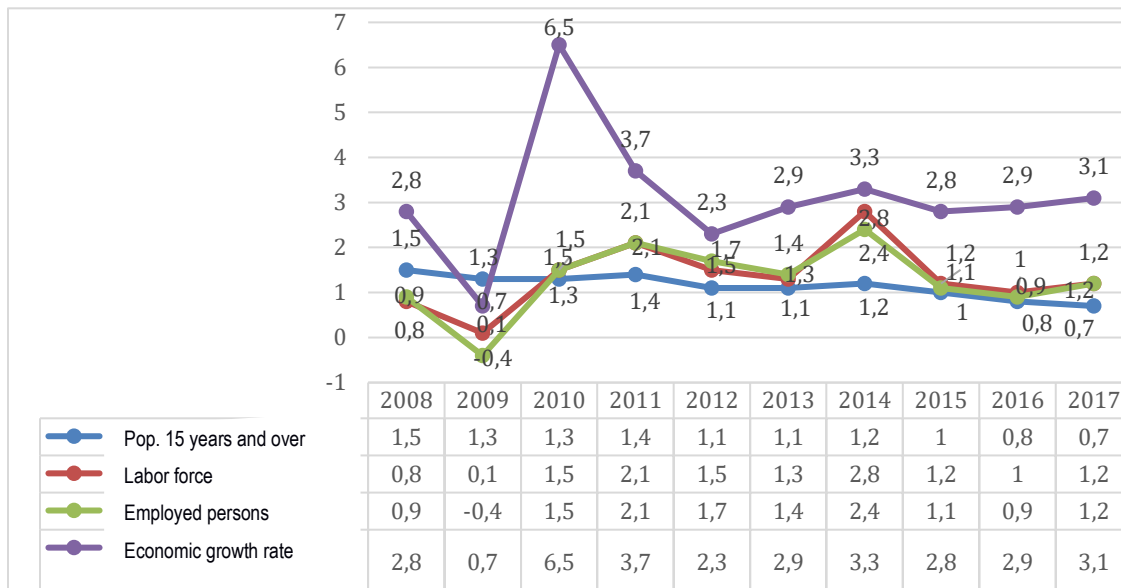
Notes:

(1) Employment rate = (employed persons aged 15 and over / population aged 15 and over) x 100

(2) Employment Rate (OECD standard) = (employed people aged 15~64 / population aged 15~64) x 100

In 2009, the number of employed persons declined sharply in the wake of the 2008 financial crisis, but employment rates improved rapidly, even though economic growth remained low at about 3% (Figure 1). This is due to the creation of jobs in the health and welfare sectors through government stimulus. If there had been no job creation in these areas, the employment rate would have been lower than in 2008 (Keum, 2018).

Figure 1. Evolution of labor market indicators (%). South Korea: 2008-2017.



Source: Korea Labor Institute. KLI Labor Statistics, each year, 2008-2018. Author's elaboration.

Labor force participation rate by gender

Throughout the world, significant gender gaps exist between women's and men's participation rates, with women typically reporting lower levels of participation in paid employment (ILO, 2011). In Korea, women's participation and employment rates are much lower than men's are. As of 2017, there were 18,253,000 women aged 15-64, with 10,433,000 of that number employed. This is equivalent to an employment rate of 57.2%, or about 19% lower than the employment rate for men. According to Min Chang (2019, p. 48):

In Korea's case, women typically experience career disruption around the age of 30, when economic activity particularly takes place. Therefore, a graph of women in employment takes an M-shape, with women in their 30s marking the low part of the "M" due to the high proportion of women that age leaving the labor market due to marriage and childbirth. As a result, the employment rate of women is lower than in other OECD countries.

Table 2. Labor force participation rate by gender (%). South Korea: 2008-2018.

	Gender	2008	2010	2012	2014	2016	2018
Labor force participation rate	Total	61.7	61.1	61.6	62.7	62.9	63.1
	Male	73.8	73.2	73.5	74.4	74.0	73.7
	Female	50.2	49.6	50.1	51.5	52.2	52.9
Employment rate	Total	59.8	58.9	59.6	60.5	60.6	60.7
	Male	74.6	74.0	75.1	76.0	75.9	75.9
	Female	53.3	52.7	53.5	55.0	56.1	57.2

Source: Korea Labor Institute. KLI Labor Statistics, each year, 2008-2018.

Notes: As of 2017 for women.

Labor force participation rate by age group

The proportion of people aged 55-64 years of the labor force participation rate is significantly higher than for youth.⁴ In 2018, the participation rate for 55- to 64-year-olds was about 70%, but only 47% for 15- to 29-year-olds. The youth employment rate remained around 45% until the early 2000s. However, it has not reached the mid- 40 percentile since the global financial crisis. As of 2018, the youth employment rate stands at 42.7%- 10% lower than the OECD average of 53.3% (M. Chang, 2019).

⁴ As of 2017, Korea's youth population totaled 9,847,587, representing approximately 19.15% of the total population of 51,422,507.

Table 3. Labor force participation rate by age (%). South Korea: 2008-2018.

	Age group	2008	2010	2012	2014	2016	2018
Labor force participation rate	15 - 64	66.2	65.9	66.5	68.0	68.7	69.3
	15 - 29	45.2	43.9	43.5	44.5	46.3	47.1
	55 - 64	61.8	60.9	63.1	65.8	66.2	69.1
Employment rate	15 - 64	64.0	63.4	64.3	65.6	66.1	66.6
	15 - 29	41.9	40.4	40.3	40.5	41.7	42.7
	55 - 64	60.6	60.9	63.1	65.8	66.2	66.9

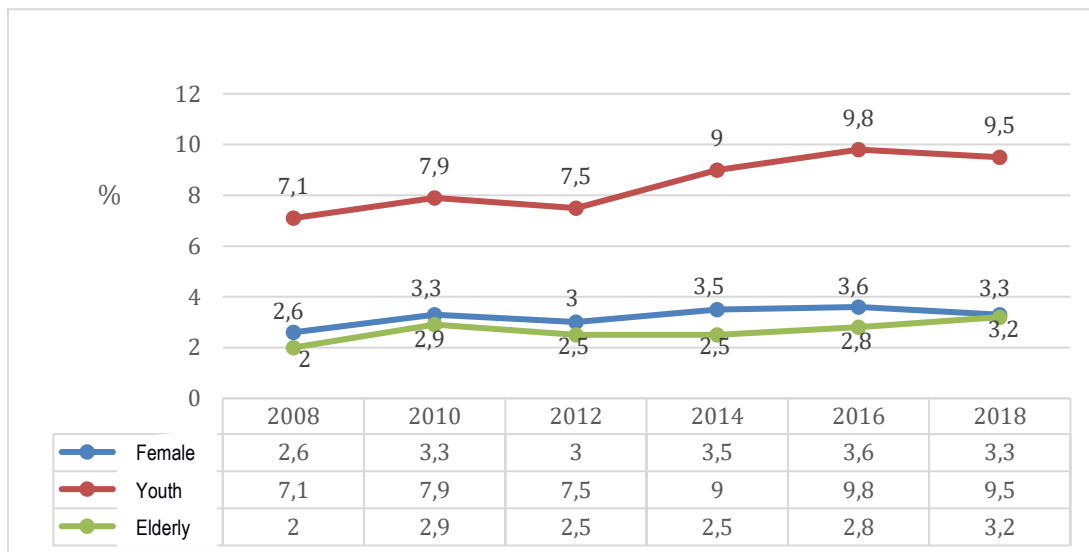
Source: Korea Labor Institute. KLI Labor Statistics, each year, 2008-2018.

Unemployment rate

The youth unemployment rate is more than three times that for senior citizens, currently standing at 9.5% (2018) – the highest level since the 1997 financial crisis. A major factor in the increase is the mismatch between jobs available and jobs desired. Young people want to work in large corporations (33.8%), in the civil service (26.4%), and for public institutions (23.0%).⁵ In addition, they prefer stable, high-paying, long-term jobs (Kim & Lee, 2018). However, there is an absolute lack of quality jobs available for youth, making it difficult for them to enter and move up in the labor market. Therefore, youth continue to job seek for longer periods of time (M. Chang, 2019).

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Figure 2. Unemployment rate by gender and age group. South Korea: 2008-2018.



Source: Korea Labor Institute. KLI Labor Statistics, each year, 2008-2018. Author's elaboration.

Notes: Unemployment rate for women is as of 2017.

⁵ Since the early 1990s, Korea has seen a rapid rise in the rate of university admissions, reaching 68.9% in 2017, and a significant increase in the number of college graduates entering the job market.

Employment composition by employment status

Employed persons classified as wage workers consist of regular, temporary, and daily workers, while non-wage workers include employers, the self-employed and unpaid family workers. The proportion of wage workers has increased by about 6% since 2008. In contrast, the proportion of non-wage workers has been decreasing.

Table 4. Composition of the labor market (1,000 persons and %). South Korea: 2008-2018.

Employed persons	2008	2010	2012	2014	2016	2018
Total	23,775 (100.0)	24,033 (100.0)	24,955 (100.0)	25,897 (100.0)	26,409 (100.0)	26,822 (100.0)
Wage workers	16,357 (68.7)	17,111 (71.0)	17,921 (71.8)	18,958 (73.2)	19,669 (74.4)	20,083 (74.8)
Non-wage workers	7,418 (31.3)	6,922 (29.0)	7,034 (28.2)	6,939 (26.8)	6,740 (25.6)	6,739 (25.2)

Source: Korea Labor Institute. KLI Labor Statistics, each year, 2008-2018.

Employment by industry

The number of people employed in the service industry overwhelms those employed in manufacturing. As of 2017, manufacturing accounted for 16.9% (or 4.5 million people) of all industry jobs, with 18.8 million people in the service industry, or 70.6% of the total workforce. Wholesale retail, food and lodging accounts for one-third of all service workers, and employment is widely distributed in these industries.

Table 5. Employment composition by industry (1,000 persons and %). South Korea: 2008, 2017.

Industry	2008		2017	
	People	%	People	%
Agriculture, forestry & fishing	1,698	7.1	1,279	4.8
Mining & manufacturing	4,008	16.9	4,504	16.9
Electricity, gas, steam & water supply	92	0.4	88	0.3
Construction	1,828	7.7	1,988	7.4
Service Sector	16,126	67.9	18,844	70.6
- Wholesale & retail trade, accommodation & food	5,719	24.1	6,087	22.8
- Electricity, transport, communication & finance	1,892	8.0	2,188	8.2
- Financial, real estate and business services	3,059	12.9	3,800	14.2
- Public service	3,499	14.7	4,882	18.3
- Other services	1,956	8.2	1,887	7.1

Source: Korea Labor Institute. KLI Labor Statistics, each year.

2. Trends in the dual structure of employment (regular, non-regular)

The Ministry of Employment and Labor (MOEL) defines a regular employee as a person on a fixed-term employment contract of one year or longer and paid regular wages, or a person whose employment is expected to last more than a year although the contract period is not fixed.⁶ Non-regular workers in the MOEL survey include contingent workers (including fixed-term workers), part-time workers and atypical workers. The expression “non-regular” work is generally used rather than “informal economy” and “precarious work” in Korea.⁷ It was just after the 1997 financial crisis, when the ratio of temporary and daily workers to employees had increased to around 50%, that non-regular workers began to receive significant social attention (Y. Kim, 2019). Therefore, the sharp rise in non-regular employment since the 1990s sits at the “core of political debates” (Shin, 2013). There are three characteristics of non-regular work in Korea. First, in terms of employment stability, temporary work accounts for a high proportion. Second, non-regular employment includes a variety of atypical work, such as dispatch and contract work. Atypical workers include on-call workers, independent contractors, temporary agency workers and domestic workers. Third, these types of workers experience severe discrimination in terms of wages and working conditions compared to regularly employed workers.

A law to protect non-regular workers was passed by the National Assembly on November 30, 2006 and was a reasonable and realistic decision considering Korea’s economic and labor environments. The Act on the Protection, etc., of Fixed-term and Part-time Employees aims at redressing undue discrimination against non-regular workers and preventing their excessive use and is the result of social dialogue between labor, management and the government (Y. Kim, 2019). It limits the employment period for fixed-term workers to a maximum of two years. If an employer uses that fixed-term worker for more than two years, the workers shall be considered, in principle, as a regular worker. The provision has resulted in a negative impact on fixed-term workers and other non-regular employees as the Act only stipulates the period of use, and not the reasons. Despite legislators passing the Act

⁶ In contrast, the Economically Active Population Survey (EAPS) divides employees into regular (permanent), temporary, and daily workers according to employment contract duration. Regular workers are those whose employment period is longer than a year, or do not have a specified employment period, are hired according to the firm’s regulations and to whom the firm’s human resource management regulations apply and receive retirement allowances, bonuses, and various other allowances.

⁷ The term non-regular worker – rather than temporary worker – is widely used in Korean economic literature, among policy makers, and within the media. The term tends to be used for all workers who are not regular workers, irrespective of employment duration. Nevertheless, a full consensus on the definition among scholars is still lacking, and the term non-regular worker (or sometimes non-standard worker) may refer to different definitions (Grubb *et al.*, 2017).

to mitigate job insecurity and discrimination against non-regular employees, the opposite resulted. The first negative impact is that employers tend to terminate the labor contract of their fixed-term workers before the two years have passed. The second negative impact is that employers tend to outsource the departments or lines to contractors and cut their direct employment relationship from fixed-term workers, who will do the same jobs in the same workplace, but be “employed” by different employers (contractors). This was often the case for cashiers in hypermarkets. It has also been noted that while some employers hired their fixed-term workers as regular workers when they were needed beyond two years, discrimination still existed. A new job category was usually created, and the fixed-term workers dispatched to a new line or department with standards of promotion and wages for open-ended contracts that differ from the original employer’s. This often occurred in the banking sector (Y. Kim, 2019).

Size of the non-regular workforce

Table 6 shows that the number of non-regular workers has continued to increase, recording 6.6 million, or 33% of all wage workers in August 2018. However, some researchers assume that this percentage would be much higher if it included workers involved in indirect employment and those who stand on the boundary between wage and non-wage work. Non-regular workers would then account for, 45% of all wage workers (J. Chang, 2017).

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Table 6. Size of the non-regular workforce by employment type (1,000 persons and %), 2009-2018.

Year	Wage workers	Regular workers	Non-regular workers			
			Total	Contingent workers	Atypical workers	Part-time workers
2009	16,609	10,826 (65.2)	5,783 (34.8)	3,528 (21.2)	2,288 (13.8)	1,428 (8.6)
2010	17,189	11,475 (66.8)	5,715 (33.2)	3,298 (19.2)	2,300 (13.4)	1,623 (9.4)
2011	17,715	11,662 (65.8)	6,053 (34.2)	3,474 (19.6)	2,452 (13.8)	1,708 (9.6)
2012	17,941	11,987 (66.8)	5,954 (33.2)	3,427 (19.1)	2,304 (12.8)	1,828 (10.2)
2013	18,403	12,426 (67.5)	5,977 (32.5)	3,446 (18.7)	2,234 (12.1)	1,883 (10.2)
2014	18,992	12,869 (67.8)	6,123 (32.2)	3,529 (18.6)	2,137 (11.3)	2,035 (10.7)
2015	19,474	13,166 (67.6)	6,308 (32.4)	3,655 (18.8)	2,229 (11.4)	2,236 (11.5)
2016	19,743	13,262 (67.2)	6,481 (32.8)	3,671 (18.6)	2,245 (11.4)	2,488 (12.6)
2017	20,006	13,428 (67.1)	6,578 (32.9)	3,725 (18.6)	2,112 (10.6)	2,663 (13.3)
2018	20,045	13,431 (67.0)	6,614 (33.0)	3,823 (19.1)	2,071 (10.3)	2,709 (13.5)

Source: Korean National Statistics (KOSIS), Supplementary Results of the Economically Active Population Survey by Employment Type, August of each year.

Notes: Numbers in parentheses refer to the proportion of all wage workers. The total size and proportion of non-regular workers may be duplicated by type, which is inconsistent with the sum. The total number of non-regular jobs removes such redundancies.

Table 7 shows the number of atypical workers. Temporary agency workers account for 0.9% of wage workers, while the proportion of contract workers decreased from 3.9% in 2008 to 3.0% (596,000) in 2018. However, as mentioned earlier, criticism is quite strong that atypical work was underestimated because it did not accurately reflect the numbers of the independent work and in-house subcontract work. For example, the number involved in independent workers is reported to be approximately 500,600 based on the Economically Active Population Survey. However, the EAPS surveyed only “wage workers” among employed persons, fundamentally excluding independent workers and underestimating their numbers. Therefore, if the widespread use of special types of workers who provide work in the “middle blind spot” (between wage earners and the self-employed) were included, the number of self-employed could be estimated number 165.8 million (Jung, 2019). The number of workers hired by in-house subcontractors at workplaces with 300 employees or more stood at 930,000. However, it should be noted that this number includes neither workers hired by in-house subcontractors at smaller establishments nor those working for external contractors that operate in separate establishments but whose working conditions and procedures are controlled by the principal employer.

Table 7. Size of the non-regular workforce by atypical work (1,000 persons and %). South Korea: 2008-2018.

Year	Temporary agency worker	Contract worker	Independent worker	Domestic worker	On-call / daily worker
2008	140 (0.9)	639 (3.9)	603 (3.7)	65 (0.4)	822 (5.1)
2009	166 (1.0)	617 (3.7)	644 (3.9)	99 (0.6)	885 (5.3)
2010	208 (1.2)	609 (3.5)	598 (3.5)	71 (0.4)	874 (5.1)
2011	198 (1.1)	672 (3.8)	625 (3.5)	76 (0.4)	974 (5.5)
2012	216 (1.2)	682 (3.8)	554 (3.1)	69 (0.4)	879 (4.9)
2013	205 (1.1)	649 (3.5)	553 (3.0)	74 (0.4)	829 (4.5)
2014	195 (1.0)	608 (3.2)	533 (2.8)	58 (0.3)	816 (4.3)
2015	211 (1.1)	660 (3.4)	502 (2.6)	55 (0.3)	886 (4.5)
2016	201 (1.0)	702 (3.6)	502 (2.5)	42 (0.2)	874 (4.4)
2017	188 (0.9)	694 (3.5)	497 (2.5)	30 (0.1)	801 (4.0)
2018	189 (0.9)	596 (3.0)	506 (2.5)	53 (0.3)	801 (4.0)

Source: Korean National Statistics (KOSIS), Supplementary Results of the Economically Active Population Survey by Employment Type, August of each year.

Notes:

- (1) Numbers in parentheses represent the proportion of wage workers.
- (2) Temporary Agency worker = a worker who provides labor for a user employer and is paid by a temporary employment agency.
- (3) Independent worker = a worker who provides a service for certain clients and is paid piece rates. A special type of employment.
- (4) Contract worker = a worker who works for a user-enterprise and is paid by a contractor.

Table 8 shows the number of non-regular jobs by gender and age. When it comes to separating the non-regular jobs between men and women, there is a significant difference.

As of 2018, 26.3% of male workers were non-regular, and 41.4% of female workers. There is also significant difference in terms of age, with those over 60 years old much more likely to hold non-regular employment than other age groups.

Table 8. Percentage of non-regular jobs by gender and age group (%). South Korea: 2008-2018.

		2008	2010	2012	2014	2016	2018
Total		33.8	33.2	33.2	32.2	32.8	33.0
Gender	Men	28.8	26.9	27.0	26.4	26.3	26.3
	Women	40.7	41.7	41.4	39.9	41.1	41.4
Age group	15 - 19	64.9	69.6	76.1	70.0	75.2	74.0
	20 - 29	31.0	31.1	30.5	32.0	32.2	32.3
	30 - 39	26.8	23.4	23.1	21.8	21.1	21.0
	40 - 49	31.6	29.7	29.1	26.6	26.1	25.3
	50 - 59	39.8	39.3	37.5	34.6	34.2	34.0
	60+	65.7	69.7	70.4	68.5	67.9	67.9

Source: Korean National Statistics (KOSIS), Supplementary Results of the Economically Active Population Survey by Employment Type, August of each year.

Table 9 shows the number of non-regular jobs by firm size. Non-regular workers are concentrated in SMEs with fewer than 300 employees. On the other hand, enterprises with more than 300 employees accounted for about 14% of wage workers in 2018.

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Table 9. Number of non-regular jobs by firm size (1,000 persons). South Korea: 2008, 2018.

No. of Employees	Aug. 2008			Aug. 2018		
	Wage worker	Regular	Non-regular	Wage worker	Regular	Non-regular
Total	16.258	10.770	5.488	20.045	13.431	6.614
1 - 4	3.164	1.764	1.399	3.528	1.793	1.736
5 - 299	11.221	7.459	3.761	13.983	9.477	4.505
More than 300	1.874	1.546	327	2.534	2.161	373

Source: Korean National Statistics (KOSIS), Supplementary Results of the Economically Active Population Survey by Employment Type, August of each year.

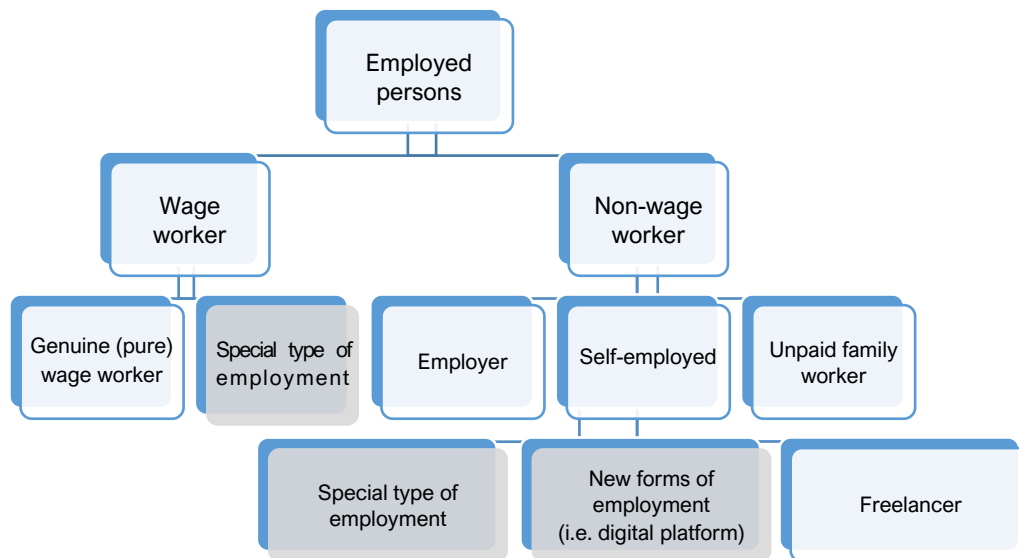
Increase in special type and new form of employment

Digitization not only changes the process of technology and economy, but also affects working conditions, work equipment and work organization. Digitization is a prominent phenomenon not only in the manufacturing industry but also in the overall service life, especially in

the service industry, which is becoming increasingly important in value creation and job creation. (Krause, 2017, p. 10).

This trend is no exception in Korea, and this type of employment has been increasing recently. According to Jung (2019), “special type of employment”⁸ in Korea account for 8.2%, or 2.2 million of all employed persons. This estimate includes 550,000 people working on digital platforms, which is classified as a new form of employment.

Figure 3. Special positions and new forms of employment



Source: Jung, 2019.

According to KEIS, men’s jobs are distributed between surrogate driving and freight transport, while women tend to work as restaurant assistants, housekeepers, and in nursing care, using O2O (On-line to Off-line) digital platforms (Table 10). Uber taxis are not currently allowed in Korea, but Cacao Carpool continues to pursue its business model. Digital platform workers in Korea are estimated to number up to 550,000 people in 2019, representing 2.0% of all employed persons.⁹

⁸ Special types of employment refer to special types of workers who provide services in the “middle blind spot” between wage workers and the self-employed.

⁹ KEIS (Korea Employment Information Service) conducted a sample survey of approximately 30,000 people over the age of 15 in 2018 to estimate the number of digital platform workers.

Table 10. Main types of platform workers. South Korea: 2019.

Ranking	Men		Women	
	Job	%	Job	%
1	Surrogate driving	26.0	Restaurant service	23.1
2	Freight transport	15.6	Housekeeping / Child care	17.4
3	Taxi driving	8.9	Nursing care	14.0
4	Sales	6.5	Cleaning	10.9
5	Cleaning, building security	5.9	Sales	10.0
6	Food delivery	5.0	Translation	4.2

Source: Korea Employment Information Service (KEIS), 2019.

Florisson (2018) defines “platform work” as a form of employment that earns income by providing short-term paid labor to customers who need the service through the brokerage of digital platforms. As Hwang (2016, p. 24) explains,

[such] proliferation of employment forms based on digital platforms can be understood to be indicated by the destabilization of employment relationships and the combination of digital technology and the extended phenomenon of unstable employment spread since the 1980s, when the standard employment relationship formed after the Second World War was dismantled.

For instance, the “on-demand economy” is made up of companies such as Uber that use digital platforms and digital networks to provide labor services to customers. “Crowd work” describes the outsourcing of certain tasks by companies to an undefined mass of people as a value creation process. Workers involved in these types of jobs are called “the digital precariat” (Krause, 2017). According to Seong-hyuk Kim (2019, p. 40),

the ILO divides non-standard employment into four types: ‘temporary, ‘part-time’, ‘dispatched and multilateral contracts’, and ‘disguised or dependent self-employed’. However, platform labor is a more complex form of employment than other non-regular work. The platform economy and platform work, which are spreading rapidly, are advantageous in that they bring about a cooperative shared society beyond capitalism, but also have a disadvantage in that they strengthen technical neoliberalism in reversing labor rights.

3. The labor market in terms of wages and working hours

General status

In 2018, the rate of nominal wage growth for workers (based on the data of all workers at establishments with one or more permanent employees) increased by 5.3% year-over-year (YoY) despite the slowdown in economic activity and employment. Real wage also rose significantly by 2.4% to 3.7% YoY.¹⁰

Table 11. Recent trends in wages and working hours. South Korea: 2011-2018.

(Units: KRW 1,000/month, hours/month, %) (Consumer Price Index: 2015 = 100.0)

		2011	2012	2013	2014	2015	2016	2017	2018
Labor Force Survey at Establish ment	All workers (rate of increase)	2,607 (-7.4)	2,744 (5.3)	2,837 (3.4)	2,904 (2.4)	2,991 (3.0)	3,106 (3.8)	3,207 (3.3)	3,376 (5.3)
	Real wage growth rate	-	(3.0)	(2.1)	(1.1)	(2.3)	(2.8)	(1.3)	(3.7)
	Total earnings of permanent workers	2,806 -	2,948 (5.0)	3,046 (3.3)	3,117 (2.3)	3,204 (2.8)	3,331 (4.0)	3,418 (2.6)	3,592 (5.1)
	Total earnings of non-permanent workers	1,152 -	1,207 (4.8)	1,247 (3.3)	1,253 (0.5)	1,281 (2.2)	1,288 (0.6)	1,353 (5.1)	1,428 (5.5)
Consumer price growth rate		4.0	2.2	1.3	1.3	0.7	1.0	1.9	1.5
Real GDP growth rate		3.7	2.3	2.9	3.3	2.8	2.9	3.1	2.7
Working hours (Monthly)	All workers (rate of increase)	176.6 -	174.8 (-1.0)	172.6 (-1.3)	170.6 (-1.2)	171.5 (0.5)	169.4 (-1.2)	166.3 (-1.8)	163.9 (-1.4)
	Permanent workers (rate of increase)	182.8 -	181 (-1.0)	179 (-1.1)	177.4 (-0.9)	178.7 (0.7)	177.1 (-0.9)	173.3 (-2.1)	171.2 (-1.0)

Source: 2018 Wage Trends and Wage Outlook for 2019, KLI Working Paper 2019-04.

Notes:

(1) Since 2011, the Labor Force Survey at Establishment published by the Ministry of Employment and Labor has expanded survey subjects to include establishments with one or more employees, increased survey frequency from quarterly to monthly, used the updated industrial classification (8th KSIC to 9th KSIC), and re-generated time-series data from 2008.

(2) All workers = establishments with one or more permanent employees.

Table 11 shows the trends in rates of economic and wage growth. Although both nominal GDP growth and nominal wage growth per capita slowed in the long term, they moved in opposite directions in 2018, with the growth of nominal GDP per capita falling by 2.4% and nominal wage per capita increasing by 2.8% YoY. The high nominal wage growth rate in 2018 appears to be closely related to the increase in wage growth for permanent workers and large-

¹⁰ Since 2018, the data on labor conditions under “the Labor Force Survey at Establishments” published by the Ministry of Employment and Labor (MOEL) has covered all workers at establishments with one or more permanent employees. During 2008-2010, the data covered all workers at establishments with five or more permanent employees; and during 1999-2007, only permanent workers at establishments with five or more permanent employees. Nominal wage growth and real wage growth showed a similar pattern even when the survey subjects were expanded.

scale businesses as compared to 2017. In particular, the two associated factors are the increase in regular payments and special cash payments for permanent workers (see Table 11). While non-permanent workers saw a 5% increase in wage growth in both 2017 and 2018, permanent employees saw a 5.1% increase in wage growth (up by 2.5% YoY) in 2018 due to a significant rise in regular payments and special cash payments. Working hours decreased. In 2017, however, the average annual hours actually worked per worker reached 2,024 hours (followed by Mexico at 2,257 hours and Costa Rica at 2,179 hours) – 265 hours longer than the OECD average (OECD, 2017).

Wage gap by employment type

Non-regular workers have significantly lower wages and social insurance coverage than their regular counterparts. The monthly average relative wage (regular workers = 100) of non-regular work remains at 54.7% of regular workers, as the wage gap grows (Table 12). In addition, Table 13 shows that 36.6% of non-regular workers were enrolled in the national pension plan in 2018, down 1.0 percentage point from 2009. It was reported that employers' intention to save on insurance premiums and workers' inability to afford insurance contributions are the main reasons for non-regular workers not being covered by pension and/or unemployment insurance (Shin, 2013).

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Table 12. Monthly average relative wages, hourly wages by type of work (%). South Korea: 2008-2018.

	2008	2010	2012	2014	2016	2018
Regular worker	100.0	100.0	100.0	100.0	100.0	100.0
Non-regular worker						
Monthly average wage	61.1	54.9	56.8	55.9	53.5	54.7
Hourly wage rates	68.1	62.5	64.4	64.3	65.4	67.9

Source: Korean National Statistics (KOSIS), Supplementary Results of the Economically Active Population Survey by Employment Type, August of each year.

Notes:

(1) When wages of regular workers =100, wages of non-regular workers are relative wages for their type of work.

(2) Hourly wage = average monthly pay / (working hours per week / 7 x 30.4).

Table 13 shows Korea's social security programs covering unemployment (employment insurance), healthcare (health insurance), and retirement (national pension). All firms hiring one or more workers are obligated to enroll in each of these programs. By employment type, social insurance enrollment rates are polarized, and the more non-regular workers, the more people are uncovered by social insurance. The overall social insurance rate exceeds 80% for regular workers, while non-regular workers have a low enrollment rate in

the national pension at 36.6%, 45.9% in health insurance and 43.6% in employment insurance.

Table 13. Social insurance subscriptions (%). South Korea: 2009, 2018.

Employment type	2009			2018		
	Employment insurance	Health insurance	National pension	Employment insurance	Health insurance	National pension
Wage worker	57.9	66.6	64.9	71.6	75.5	69.8
Regular	67.3	79.5	78.7	87.0	90.1	86.2
Non-regular	39.1	40.9	37.6	43.6	45.9	36.6

Source: Korean National Statistics (KOSIS), Supplementary Results of the Economically Active Population Survey by Employment Type, August of each year.

Note: Aggregate numbers; excludes civil servants, private school faculty members, and employees of the post office.

Wage gap by gender

The wage level of female workers increased from 62% of that for male workers in 2009 to 66% in 2018 (Table 14). In 2018, women earned an average wage of 2,087,000 won, while men earned 3,135,000 won. Korea has the largest gender pay gap of the major OECD countries,¹¹ with women earning an average of 37% less than men. The average monthly income and median income for men stood at 3.37 million won and 2.62 million won, respectively. For women, the average monthly income and median income stood at 2.13 million won and 1.67 million won, respectively.

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Table 14. Gender pay gap (%) and sum of monthly pay (KRW 1,000). South Korea: 2009-2018.

		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Women	Sum of monthly pay	1,422	1,477	1,548	1,654	1,705	1,742	1,781	1,869	1,946	2,087
	Gender pay gap (%)	62	62	63	64	64	63	62	64	64	66
Men	Sum of monthly pay	2,284	2,361	2,444	2,569	2,664	2,761	2,837	2,918	3,010	3,135

Source: Ministry of Employment and Labor (MOEL), Survey on Labor Conditions by Employment Type (based on establishments hiring one or more persons).

Note: Sum of monthly pay = flat salary + overtime (excluding bonuses and special salary).

¹¹ In 2015, the gender pay gap in Korea was 37.2%, in Japan it was 25.7%, in United States it was 18.9%, in Finland it was 18.1%, in Germany it was 17.1%, in Australia it was 13.0%, in France it was 9.9%, and in Denmark it was 5.8% (OECD Employment Outlook 2017).

Wage gap by firm size

Korea's SMEs account for an overwhelming proportion in terms of the number of businesses and employees but generally struggle with low productivity, poor wages and bad working conditions. The gap in job quality between large firms and SMEs is large. As for the average monthly income of wage workers by enterprise type, incorporated companies recorded 3.17 million won. The larger the company, the higher the wages and the shorter the working hours (Table 15). As of 2018, the average monthly pay for employees of companies hiring more than 300 people was 5.3 million won – more than twice the average monthly wage (KRW 2,022,000) for employees of SMEs hiring fewer than five people. On the other hand, working hours are the highest for businesses with more than 30 and fewer than 300 employees. The gap in size of these companies is steadily expanding as the dual structure of the labor market intensifies.

Table 15. Working hours (hours) and total wages (KRW 1,000) by firm size. South Korea: 2012-2018.

Firm size	2012		2014		2016		2018	
	Working hours	Total wages	Working hours	Total wages	Working hours	Total wages	Working hours	Total wages
Total	174.8	2,744	170.6	2,904	169.4	3,106	163.9	3,376
1~4 employees	176.5	1,664	167.1	1,708	162.8	1,835	157.5	2,022
5~9 employees	171.5	2,126	166.8	2,256	166.6	2,450	159.3	2,699
10~29 employees	172.3	2,525	170.3	2,725	170.2	2,952	164.5	3,188
30~99 employees	179.1	2,904	175.5	3,145	177.2	3,341	170.1	3,535
100~299 employees	179.5	3,255	176.6	3,334	174.4	3,554	170.4	3,922
More than 300	171.0	4,290	168.9	4,678	166.9	4,959	163.3	5,305

Source: Ministry of Employment and Labor (MOEL), Survey on Labor Conditions by Employment Type (based on establishments hiring one or more persons).

Note: Sum of monthly pay = flat salary + overtime (excluding bonuses and special salary).

Minimum wage

The minimum wage system was introduced in 1988 with the purpose of protecting the basic livelihood of workers and improving workforce quality by setting nationwide standards for wages. Initially, it applied only to establishments with 10 or more full-time workers in the manufacturing sector. Application was extended to establishments with 10 or more employees in all industries in 1990, to establishments with five or more employees in 1999, and finally to all establishments starting November 2000. It is illegal for any employer to pay less than the legal minimum wage. The minimum wage is set by the Minimum Wage

Commission, which consists of representatives from labor, management, and public interest groups. When minimum wage level is set, it applies from January 1 to December 31 of the following year. For 2018, the Minimum Wage Commission decided to raise minimum wage 16.4% from the previous year to KRW 7,530 (USD 7.03) per hour (Table 16). This is the largest increase since 2001 when it was increased by 16.8%. There has been heated debate over the impact of this on the economy and labor market.

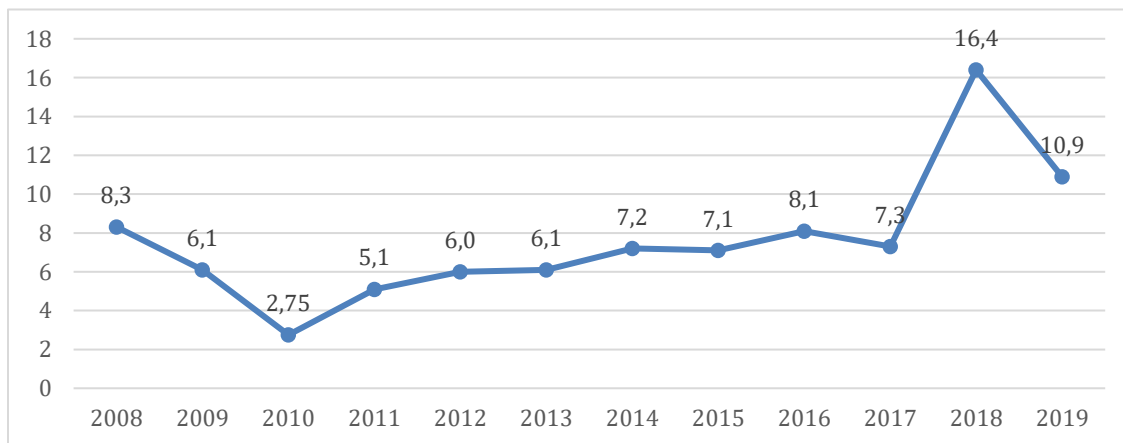
Table 16. Minimum wage and number of beneficiary workers. South Korea: 2008-2019.

Year	Minimum wage (KRW)	Increase (%)	Beneficiary workers (1,000 persons)	Influence rate (%)
2008	Hourly 3,770	8.3	2,214	13.8
2009	Hourly 4,000	6.1	2,085	13.1
2010	Hourly 4,110	2.8	2,566	15.9
2011	Hourly 4,320	5.1	2,336	14.2
2012	Hourly 4,580	6.0	2,343	13.7
2013	Hourly 4,860	6.1	2,582	14.7
2014	Hourly 5,210	7.2	2,565	14.5
2015	Hourly 5,580	7.1	2,668	14.6
2016	Hourly 6,030	8.1	3,420	18.2
2017	Hourly 6,470	7.3	3,366	17.4
2018	Hourly 7,530	16.4	3,366	17.4
2019	Hourly 8,350	10.9	5,005	25.0

Source: The Minimum Wage Commission of Korea, 2019.

Note: Influence refers to the percentage of workers affected by the minimum wage increase.

Figure 4. Rate of minimum wage increase (%), by year. South Korea: 2008-2019.



Source: The Minimum Wage Commission of Korea. Author's elaboration.

Conclusion

Looking at the key indicators and characteristics of Korea's labor market so far, there are several observations to be made. First is that, Korea has seen a temporary economic downturn since the 2008 financial crisis, which has slowed employment and increased unemployment, but the government's increased fiscal spending has resulted in increased population and increased employment. However, the employment rate of women, vulnerable group in the labor market, has not improved, especially among youth, and high unemployment remains a challenge.

Second, the Korean labor market dualistic in structure in terms of employment type and firm size. Notably, it is primarily characterized by employment type, with non-regular workers making up 33% of all wage workers according to government statistics, and 45% according to other statistics. After the 1997 foreign exchange crisis, non-regular employment increased rapidly, with the majority of wage workers relying on such employment, but has been declining somewhat in recent years. Non-regular workers are generally much less well-off than those in regular employment, as measured by wage income and coverage by the various social insurances. This non-regular employment is concentrated in certain industries, occupations, and is characterized by a higher percentage of female workers than male. This is the cause of polarization of labor and a factor in the worker inequality (OECD, 2017). On the other hand, the labor market is dualized into large corporations and SMEs, and regular and non-regular workers, and there is a gap in wages and working conditions. Therefore, the workforce is clearly divided not only by type of employment, but also by size of employer.

Third, the recent phenomenon gaining attention in the labor market is the increase in special employment (i.e. self-employed or independent work) and digital platform work. The special employment makes up about number 500,600 of all wage workers according to government statistics, and number 165.8 million according to other statistics. As well as digital platform workers in Korea are estimated to number up to 550,000 people in 2019, representing 2.0% of all employed persons. It should be noted that "digital platforms generally do not recognize microtaskworkers as employees in the traditional sense. Instead, almost all platforms require workers to accept classification as self-employed persons, or independent contractors" (Berg *et al.*, 2018, pp. 3-4). In any case, as this trend is likely to continue increasing in the future, it is urgent to conduct specific policy alternatives the protection of labor laws and social insurances.

In summary, as mentioned earlier, Korea's labor market faces a variety of complex challenges. These include relatively low and stagnant employment rates, high rates of non-

regular employment, long working hours, and population aging trend. At the heart of these problems is the issue of dual structure in the labor market. Therefore, the elimination of the polarization of the labor market and the creation of quality jobs is an important task.

Finally, a comment on the recent attempt to change labor policy should be added. In May 2017, the Moon Jae-in government promised to create more jobs, reduce the number of non-regular workers and improve working conditions in order to build a society that respects and values workers. According to Lee (2019, p. 775):

The government has proposed three major goals of its economic policies, namely income-led growth, innovative growth and a fair economy; and promised to move away from the old paradigm that led to income polarization and unfair economy and take a paradigm of 'people-focused economy' as its main policy goal. However, with the second year of the new administration unfolding, the government is being criticized over a lack of progress on labor policies. Among the income-led growth policies, only the minimum wage hike has been quite visible. Efforts made in reforming the chaebol to improve the structural soundness of the Korean economy, in revitalizing the local businesses and supporting micro-enterprise owners, in improving the property tax system have been criticized as insufficient. Under the slogan of innovative growth, the government pledged to advance the manufacturing industry and respond to the 4th industrial revolution, but there have been no concrete industrial policies in the field, and the innovation strategies for such key industries as automobile, shipbuilding and steel have also been criticized as inadequate. Against such background, labor circles are concerned that the policy of "respecting labor and reforming chaebol" is gradually turning into the policy of "respecting chaebol and reforming labor."

The promise of transition to a new work regime, overcoming the limitations of the 1987 regime, has not been fulfilled. Initially, the union movement applauded the government's efforts to eradicate the so-called "labor jeokpye" (deeply ingrained vices), convert non-regular workers into regular workers in the public sector, increase the minimum wage, and limit maximum hours of work. However, little progress was made, and then the government changed its agenda in the field of labor policies. Probably, in the coming years there will be no significant changes in the structural characteristics of the Korean labor market.

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