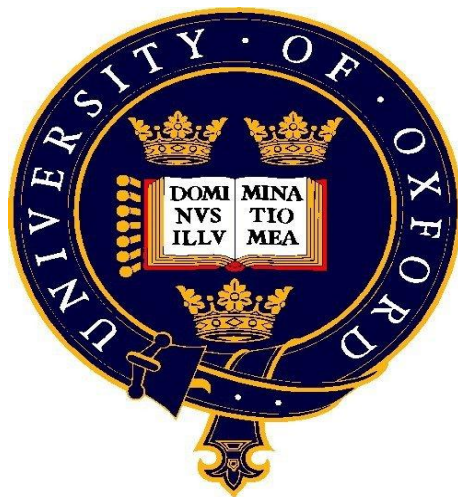


An Ageing Population in a Family and Welfare State:

The Dynamics of Family Support and Public Pension Systems,
and Their Impact on Late-Life Happiness
in Contemporary South Korea



SEUNG-MIN PARK

Kellogg College and
Oxford Institute of Population Ageing
Submitted in partial requirement for the degree of

DOCTOR OF PHILOSOPHY

Michaelmas Term, 2012

UNIVERSITY OF OXFORD



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All errors remain only mine.

[ABSTRACT]

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Kellogg College and Oxford Institute of Population Ageing
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Submitted in partial requirement for the degree of **Doctor of Philosophy**

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The purpose of this thesis is to analyze the dynamics of family support and public pension systems, and their impact on late-life happiness in contemporary South Korea. For this, three specific research questions, namely (1) the dynamics of intergenerational solidarity, public pension systems, and happiness; (2) the association between intergenerational solidarity and happiness; and (3) the association between public pension systems and happiness, are analysed by exploiting the Korean Longitudinal Study of Ageing.

The analyses show that (1) the structural solidarity of older people is relatively stronger than of middle-aged people; (2) contacting is the key player in associational solidarity in later life; (3) middle-aged people supply more financial aid to their adult children than they receive from them, but the reverse applies to older people. Both middle-aged and older people actively exchange food, household items, and health-care supplies; (4) more older men receive the National Pension Scheme benefit than older women but the reverse is true for the Basic Old-Age Pension benefit; (5) the level of happiness in later life is very high but decreases as people age; (6) the number of adult children, frequency of contact, and amount of financial support are positively associated with the happiness of older people; and (7) the National Pension Scheme is positively associated with the happiness of older men while the Basic Old-Age Pension is negatively associated with the happiness of older people.

The results suggest some policy implications for late-life happiness in contemporary South Korea. At the individual level, increased frequency of contact, availability of the children, and the amount of financial support can enhance late-life happiness. At the governmental level, the research suggests that the gendered structure of the National Pension Scheme and means-tested structure of the Basic Old-Age Pension should be reformed.

Key Words: Middle-Aged and Older People, Intergenerational Solidarity, National Pension Scheme, Basic Old-Age Pension, Happiness, Korean Longitudinal Study of Ageing, South Korea

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The dramatic demographic transformation involving the fertility rate, marriage, divorce, life expectancy, and family composition that we have seen since industrialization in South Korea has changed intergenerational solidarity. This has led to an alteration in the traditional family support system for later life in contemporary South Korea. Many studies reported that family support is one of the most important components that significantly determine the level of happiness in later life. Therefore, it follows that happiness in later life would be affected by the shift in intergenerational solidarity. Accordingly, the South Korean government has responded to this change by implementing or reforming, mainly, the old-age income security policy, namely the public pension systems such as the National Pension Scheme, a contributory system, and the means-tested Basic Old-Age Pension. There are, however, no sophisticated studies that analyze the dynamics.

This thesis aims to study the dynamics empirically. To achieve this research aim, the thesis is conducted through the following three specific research questions: (1) What are the dynamics of intergenerational solidarity, public pension systems, and happiness in later life in contemporary South Korea?; (2) How does intergenerational solidarity significantly determine the degree of happiness in later life in contemporary South Korea?; and (3) How do the public pension systems significantly determine the degree of happiness in later life in contemporary South Korea? These research questions are analysed by age group (for example, the middle-aged and the elderly), as well as by gender. The quantitative analysis gained by exploiting the nationally representative data set, the Korean Longitudinal Study of Ageing (the 2008 version of the KLoSA), demonstrates the following results.

First, regarding structural solidarity in terms of the number of adult children, the analysis shows that middle-aged people have on average two adult children whereas older people have on average three adult children. In relation to structural solidarity in terms of geographical proximity, the analysis shows in middle-aged people this was not strong, whereas that of older people was strong, in the context of living within one hour's distance from adult children by public transportation. The analysis also shows that middle-aged and older people who have a greater number of adult children are more likely to meet and contact with their adult children, and that those who receive non-financial support from adult children are more likely to report higher level of happiness.

Regarding associational solidarity, the key element of both middle-aged and older people was contact via other communication channels with adult children rather than face-to-face meeting. Moreover, the younger middle-aged people are more likely to meet with and contact their adult children, while younger older people are less likely to meet and contact with their adult children. Middle-aged and older people who enjoy better ADL (Activities of Daily Living) and IADL (Instrumental Activities of Daily Living) conditions are more likely to meet but less likely to contact with their adult children whereas those who are depressed are more likely to meet and contact with their adult children. Furthermore, middle-aged and older people who live close to their adult children are more likely to meet them but less likely to contact them through other communication channels.

As regards financial functional solidarity, middle-aged people supplied more financial aid to their adult children than they received from their adult children, while older people received more financial support from their adult children than they provided to their adult children. The strength of financial functional solidarity increased as middle-aged parents became older but that of older people began decreasing at the age of 75. Regarding non-financial functional solidarity, both middle-aged and older people actively exchanged food, household items, and health-care supplies. Both groups provided their adult children with more food than they received from them but they received other items in greater quantity from their adult children. Middle-aged and older people who are employed and have more money are less likely to receive financial support from their adult children, but are more likely to provide financial support for their adult children. Moreover, those who have a greater number of adult children are more likely to receive both financial and non-financial support from them. Meanwhile, a gender difference has been identified in the receipt of public pension benefits: almost three times as many older men received the National Pension Scheme benefit than older women, while over 10 per cent more older women received the Basic Old-Age Pension benefit than older men. Older people who receive the Public Pension Scheme benefit are more likely to report higher degree of happiness while those who receive the Basic Old-Age Pension benefit are less likely to report higher levels of happiness.

Although the level of happiness of both middle-aged and older people was high, the degree of the happiness decreased in both groups as they aged. The younger middle-aged and older people are more likely to report higher level of happiness than the older middle-aged and old older people. Married middle-aged and married older men are more likely to be happier than those who are not married. Religious middle-aged and older women are more likely to report a greater degree of happiness than those who are irreligious. Middle-aged people who have a better financial situation are more likely to report higher levels of happiness. Middle-aged and older people who have a house or a vehicle, and have better physical, mental, and subjective health conditions are more likely to report higher levels of happiness.

Second, regarding the impact of structural solidarity, only the indicator of the number of adult children significantly determines the degree of happiness of older people. This means that structural solidarity in terms of the number of adult children is not an influential determinant of the happiness of middle-aged people but only for older people. This is probably attributable to the fact that South Korean older people hold relatively stronger Confucian views on fecundity as a source of great family happiness than middle-aged people. Furthermore, the insignificance of the other dimension of the structural solidarity, namely the geographical proximity, on the happiness of both middle-aged and older people is partially attributable to the developed telecommunication technology in place after the modernization of the South Korea. In other words, technological development allows people to maintain real-time intimate relationships, i.e. through 'freedom from spatial borderline' or 'immediate and decentralized connections'.

When it comes to the impact of associational solidarity, the happiness of middle-aged people is not significantly affected by any kind of associational solidarity while that of older people is significantly affected by associational solidarity in terms of the frequency of contact with adult children by means of communication channels. This reflects that associational solidarity is not a critical determinant of the happiness of middle-aged people whereas associational solidarity in terms of the frequency of contact with adult children by means of communication channels is an influential element of the happiness of older people. Another notable point is that the greater impact of the frequency of contact through other communication channels with the first adult child than with any other adult children supports the older South Korean people's conventional familial values. In other words, the result confirms the fact that the older generation places more emphasis on the first rather than other adult children, based on traditional Confucian familism.

The results are probably drawn from the relatively stronger individualism among middle-aged than older people after industrialization in South Korea. It is also attributable to the role of contact on happiness in later life in buffering the effects of negative incidents as well as the effect of contact for enhancing 'social connectedness'. Furthermore, the result that none of older people group is significantly affected by the frequency of face-to-face meeting is somewhat contradictory

in South Korean family relations in that almost all South Korean parents lay an emphasis on face-to-face meeting as a 'thick' association. This may be attributable to the changed South Korean family culture after the extended family structure collapsed as a consequence of industrialization, i.e. the modern relationship between adult children and their parents in South Korea has been restructured as more individualistic than before.

Regarding the impact of functional solidarity, it is only the financial functional solidarity that significantly determines the degree of happiness of older people. This might be attributable to the fact that financial transfer can lessen the income risk of older people. The positive effect of financial support from their adult children may be more significant for older people than for middle-aged parents because the vast majority of older people are not employed or earning a regular income. It is also possible that receiving financial aid from their adult children would satisfy the normative and cultural expectation of older people who take Confucianism for filial piety by their children for granted in South Korea.

Third, regarding the impact of public pension systems, the National Pension Scheme benefit significantly determines the level of happiness of older men while it does not do this for older women. This means that the National Pension Scheme benefit is a critical factor for the happiness of only older men but not for older women. This gender difference may be attributable to the patriarchal structure of the National Pension Scheme, which is based on the strong male bread-winner model of the South Korean welfare state. In other words, in South Korea, women are relatively more excluded from the National Pension Scheme than men because the structure of its labour market is originally constituted for men rather than women.

Moreover, there is a negative association between the Basic Old-Age Pension benefit and the happiness of both older women and men. This surprising negative effect is probably produced because of the small amount of benefit paid, fixed at 5 per cent of the average monthly income during the immediate three previous years before individual's start date for receiving benefits from the National Pension Scheme: the amount of benefit is not enough to mitigate the existing general negative effect of impoverishment. In other words, recipients who already experience existing economic impoverishment (only individuals below a certain income level can apply for the Basic Old-Age Pension benefit) are unlikely to experience a meaningful improvement in their happiness. Additionally, the negative effect is probably related to the structural failure of the Basic Old-Age Pension. In other words, the means test possibly causes the negative effect on the happiness of both female and male recipients because of social stigma, damaged dignity, shame, constraining one's agency and capability, and exposure to the 'disciplinary gaze' when providing obligatory personal information.

Consequently, in the South Korean context, the results imply that family support still plays a very important role in late-life happiness even if the role of the traditional family support system has diminished as a consequence of the huge demographic transitions after industrialization. It suggests that, at the individual level, more frequent contact via communication channels, the availability of adult children, and a greater amount of financial support are the critical elements for late-life happiness. The empirical result also shows that public pension systems do not affect late-life happiness as expected, such as positively and gender-equally, but rather that their effects are diverse according to the embedded context of older people in contemporary South Korea. This suggests that, at the governmental level, the gendered structure of the National Pension Scheme should be reformed together with promoting female labour market participation for gender equality of late-life happiness. The analysis also suggests that policy response is needed to reform the Basic Old-Age Pension more progressively by replacing the current means-tested structure with a universal system.

Key Words: Middle-Aged and Older People, Intergenerational Solidarity, National Pension Scheme, Basic Old-Age Pension, Happiness, Korean Longitudinal Study of Ageing, South Korea

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Chapter 1

Introduction

1.1. Introduction

This chapter aims briefly to account for not only the key motivation but also the overarching picture of the thesis. The chapter first explains the historical stream of happiness research that has proliferated, particularly in recent times. Then the chapter examines the general relationship between family support, government's welfare policy, and happiness in later life followed by a research gap on those topics. Finally, this chapter presents the outline of the thesis.

1.2. The Peak Era of Happiness Research

In the present era of the post-materialist society, as individuals live longer, achieving a good quality of life is not just about money; happiness is replacing economic survival as an issue in later life (Bauman, 1995; Inglehart, 1997; Myers, 2004; Graham, 2011).

Historically, the Enlightenment during the 18th Century, the French Constitution in 1793 as well as the Declaration of the American Independence in 1776 made it clear that all people have a right to pursue their happiness, and that happiness should be a goal of society (De Vos, 2012; McMahon, 2006). It was around the 1970s that social scientists started actively to discuss the subject of happiness in later life (Myers and Diener, 1996; Sarvimaki and Stenbock-Hult, 2000; Hagerty et al., 2001; Vaarama, Pieper and Sixsmith, 2007).

For example, establishing 'Social Indicators Research', 'The Journal of Happiness Studies', 'Applied Research in Quality of Life', and 'The International Society for Quality of Life Studies' followed by the social indicators movement in Scandinavian countries and in the United States of America (USA) in 1970s, and by the International

Conference on Happiness and Public Policy in December 2010 in Ottawa, Canada stimulated a steady-increase in studies on the happiness in later life (Scottish Executive Social Research, 2005; Cummins and Lau, 2006; CSLS, 2011). Notably, several new policy suggestions, including ‘a society for all ages’ and ‘active ageing’, which were discussed in the Madrid International Plan of Action on Ageing in 2002 (Sidorenko and Walker, 2004), increased the focus of attention on happiness in later life (Walker and Mollenkopf, 2007). This reflects that there has been a paradigm shift from the normalization and negative perception of ageing to a positive view of ageing in managing or making policies for people in later life (Plagnol, 2010; Bowling, 2004a, 2004b; Schalock, 2004; Wykle, 2005).

Meanwhile, the role of government traditionally focused primarily on maintaining the social order and protecting a nation from the external forces, as Adam Smith indicated as follows:

“...the sovereign has only three duties...first, the duty of protecting the society from the violence and invasion of other independent societies; secondly, the duty of protecting, as far as possible, every member of the society from the injustice or oppression of every other member of it...thirdly, the duty of erecting and maintaining certain public works and certain public institutions.” (Smith, 1994 [1776]: 745)

In those days, directly enhancing the happiness of the population in general was not considered the main role of the government (Bok, 2010; Johns and Ormerod, 2007). For example, in the 19th century, Smiles (1860) emphasized ‘self-help’ by individuals for their own happiness, and argued that the government should not aim to increase happiness directly. Rather, it should focus on protecting people from unhappiness because the function of government is inherently restrictive and even sometimes negative, where the happiness of people in general is concerned. Popper (1962) also argued that the

business of government is not promoting the happiness of people but protecting them from suffering caused by social problems. Some scholars even described a government that tried to enhance the happiness of general people directly as a ‘nanny state’ (Harsanyi, 2007) and as a ‘therapeutic state’ (Polsky, 1991), and so forth.

However, there has been a ground-breaking shift in the responsibility of governments in recent years. In other words, globally, increasing the number of healthy life years and the level of happiness has become a central policy issue for many governments, such as the United Kingdom, France, the USA, Canada, Australia, China, Brazil, Bhutan, and so on (Bryson et al., 2012; Graham, 2009; Kinsella, 2000). Every government had been trying to increase the happiness of ageing populations and the overall result of the endeavour was evaluated by mainly economic indicators, namely both GDP (Gross Domestic Product) and GNP (Gross National Product). Recently, they had been criticized by many social scientists because they do not show the overarching picture of welfare of people but simply summarizes the size of the economy of a specific nation (Ormerod, 2012). The extent of GDP and GNP sometimes even increases owing to a decline in welfare (Johns and Ormerod, 2007). On the other hand, there has been a remarkable demand by politicians to find a new indicator for capturing the extent of the welfare of whole populations (Stutzer and Frey, 2010).

Social scientists have since been trying to overcome the shortcomings of the GDP and GNP by considering not only economic but also non-economic elements of a life (Schyns, 1998). One of the most important studies in this regard was undertaken by Nordhaus and Tobin (1972). They suggested a model for the ‘measure of economic welfare’. The model includes leisure time as a non-economic element but excludes the cost of policing and defence since they regarded this as not attributable to welfare. Ultimately, their endeavour was not enough to overcome the conventional economic

perspective on happiness; rather it was constrained within the traditional perspective.

In a continuous line of that endeavour, more recently a global movement has emerged to create a novel indicator, namely the Gross National Happiness (GNH) worldwide (Mack, 2010; Alanen et al., 2010). For example, at the global conference on ‘Beyond GDP’ accompanying with the European Parliament, and the Club of Rome in November 2007 (EC, 2009), 27 European countries officially announced that they would make new lens to replace the GDP. The Organization for Economic Co-operation and Development (OECD) has also clearly indicated the limitation of the GDP as follows:

“Ever since the OECD started out in 1961, GDP has been the main factor by which it has measured and understood economic and social progress. But it has failed to capture many of the factors that influence people’s lives, such as security, leisure, income distribution and a clean environment.” (OECD, 2012c: 1)

Then the OECD stresses the importance of developing a new tool for assisting the GDP and the endeavour was summarized by ‘Better Policies for Better Lives’ at the World Forum in November 2012 (Self, Thomas, and Randall, 2012). It is still under-going under the ‘Better Life Initiative’ umbrella, which encompasses eleven domains of human well-being (OECD, 2012b).

In particular, the French government established the Commission on the Measurement of Economic Performance and Social Progress (CMEPSS) in 2008 (OECD, 2011a). In 2009, the CMEPSS suggested about thirty recommendations for ways of improving the measurement of happiness. These recommendations were supported not only by the French National Statistical Office (INSEE) but also by the European Commission and the Eurostat at the European level (EC, 2009).

Similarly, David Cameron, the Prime Minister of the United Kingdom, made an

announcement on that issue on 25 November 2010:

“...and today the government is asking the Office of National Statistics (ONS) to devise a new way of measuring wellbeing in Britain. And so from April next year, we'll start measuring our progress as a country, not just by how our economy is growing...but by our quality of life.”
(Cameron, 2010)

This means that ‘happiness’ will be the important indicator for evaluating the UK government’s policies. The government invested two million pounds in the National Well-Being Project (Simkins, 2011). The project was undertaken by the ONS to create a national framework for measuring happiness, namely ‘the happiness index’, for UK citizens in 2010 (Ward, Barnes, and Gahagan, 2012). Finally, the first national report on the state of well-being of the UK was published in November 2012 and encompasses not only economic dimensions but also subjective domains of life (Self, Thomas, and Randall, 2012).

Furthermore, there is a movement to develop the GNH index at the United Nations level. For example, the United Nations General Assembly Resolution 65/309, entitled ‘Happiness: Towards a Holistic Approach to Development’ achieved consensus among the 193 member countries on 19 July 2011. The document states that happiness is the fundamental value of a human being but that traditional economic indicators such as GDP and GNP cannot measure the value appropriately (UN, 2011a). Based on this resolution there a high-level meeting was held at the United Nations headquarters in New York on 2 April 2012 to launch the global movement to develop a new economic paradigm that reflects people’s happiness. Finally, the first World Happiness Report, which analyzed 1,000 people aged from 15 to 60 in 156 countries, was published by the United Nations in April 2012 (Helliwell, Layard, and Sachs, 2012). The report generally

shows that income affects just around 8 per cent of overall happiness but that non-economic elements are more important for one's happiness, namely the fundamental message of the report is that the GNH should be developed as an alternative measure to GDP and GNP (Bok, 2010).

Meanwhile, it should be noted that the concept of happiness is the most fluid and diversely defined of terms (Bok, 2010; Gilman, 2010; Kringelbach and Berridge, 2010). Conceptually, there are two kinds of happiness: namely the hedonic happiness that is related to pleasure, and the eudemonia that is relevant to the well-lived life as a kind of self-validation (Scollon and King, 2004; Warr, 2007; Dolan and Metcalfe, 2012). Hedonic happiness is about the positive feeling about one's life rather than the goodness of the whole life. However, the eudemonic perspective on happiness questions the concept of hedonic happiness in that enjoyment in and of itself does not adequately nor completely explain the concept of happiness. In other words, the eudemonic perspective focuses on the amount of value of people spent on activities (Thin, 2012). The convergent point of those two different lenses is that happiness is the extent of 'feeling' (Campbell, Converse, and Rogers, 1976: 8) or 'mood' (Lane, 2000: 275), and how much the positive feelings outweigh the negative feelings by one's activities (Bradburn, 1969; Seligman, 2002). Therefore, happiness means "the subjective life satisfaction based on comparison with a reference group" (Veenhoven, 1991: 2; Burchardt, 2005: 61), as well as being a relative and subjective evaluation (Blanchflower and Oswald, 2004; Clark and Oswald, 2002) that can be a kind of indicator of well-being (Benjamin et al., 2012; Sirgy, 2002) and the quality of life (Veenhoven and Hagerty, 2006).

Empirically, there are many indicators measuring happiness, and these empirical indicators have been used worldwide since the 1940s (Thin, 2012). For example, there are single-dimensional questions, multi-dimensional questions, general cognitive evaluation,

and cognitive evaluations stressing one's feelings, and so on. Among them, according to Stiglitz, Sen, and Fitoussi (2009), the single-dimension method can show one's diverse experiences and preferences naturally as well as constituting the proper approach to show the first priority among the various elements of the people.

1.3. The Family, The Welfare State, and Happiness in Later Life

Even though there are many variables that affect happiness in later life, determinants relevant to both family relationship (Thin, 2012; Brown, Bowling, and Flynn, 2004; Antonucci and Ajrouch, 2007) and a government's welfare policies are the core elements for happiness in later life (The Royal Society, 2012; EFILWC, 2004). This is mainly because people are not only "embedded in family relations throughout their lifetime" (Hoff and Tesch-Romer, 2007: 65) but also because a government's welfare policies surround people and directly determine their daily lives (Thin, 2012; LGID, 2010). Relatively recently, there has been a remarkable change, mainly as a result of the population ageing; the change has occurred in two opposite directions in both family and government areas.

On the one hand, despite the fact that people aged 40 and over strongly perceive their family as important and that over 80 per cent of them regard providing support for their older parents as their obligation across the globe (Leeson and Harper, 2007), conventional family relations have been restructurized, inducing the decline in family support for older parents as a result of population ageing (Veron, Penne, and Legare, 2007). In other words, unlike people's perception of their obligation to support older parents, the decreasing strength of intergenerational solidarity associated with demographic transformations implies that the traditional family support for the older

generations will not be as sustainable as before (Goode, 1970; Silverstein, Bengtson, and Lawton, 1997; Teo et al., 2003). This change is studied from the perspective of the ‘family decline’ hypothesis, which focuses on the collapsing role of family support for older generations, and it was raised mainly in the Western countries (Popenoe, 1988, 1993; Skolnick, 1991; Bengtson, Rosental, and Burton, 1996; Stacey, 1998; Bengtson and Oyama, 2007). As a result, public request for a public caring system for older generations for their happiness increased in the Western welfare states earlier than in any other countries.

However, the impact of declining family support for the happiness of older parents will be relatively stronger in Asian countries than Western countries not only because they have relatively stronger family values for supporting their older parents, i.e. Confucianism for ‘Hyo’ (filial piety), but also because their social infrastructure for older people has not been as well established as in Western welfare states (Arber and Timonen, 2012; Wilding, 2005; Lee, 1997). Owing to the dramatic demographic transitions, the value of Hyo has been distinctively collapsing (Ikels, 2004; Chappell, 2007; Yi and Lin, 2009). Furthermore, the speed of population ageing in this area is the fastest in the world (Fu and Hughes, 2009). Among them, South Korea has been experiencing the most dramatic and huge demographic transition after industrialization (since the 1960s) and its velocity of ageing has already surpassed that of Japan (ESCAP, 2008, 2009). Moreover, South Koreans took filial piety for granted for a very long time, since Chosun Dynasty, which was established in 1392 (Eun, 2003). This implies that the impact of a collapsing traditional family support system on the happiness of people in later life in South Korea will be enormous.

On the other hand, the government’s social welfare system for supporting older parents has been enhanced by the population ageing (Vogel, Ludwig, and Borsch-Supan,

2012; Gauthier, 2007; Rosenthal, 2000). In other words, because of the collapsing conventional family support system for older people, such as the steeply and continuously decreasing number of children who can support older parents, and so on, most of governments increased social expenditure to implement or progressively reform the social welfare system to protect older people from the collapsing conventional family support (Seike, Biggs, and Sargent, 2012; Bloom, Jimenez, and Rosenberg, 2012; Davy, 2011). For example, there are diverse kinds of welfare systems for older generations, such as national health insurance, pension, long-term care insurance, and so forth.

Regarding the increased responsibility of the government in the face of the decreased role of family support for older people, some argued that the family as the major source of caring for older people has already become a myth (Shi and Ku, 2009). However, it is premature to decide whether government should replace the role of family in supporting older people. In reality, in developing countries, the government's welfare system plays a minor role in the happiness in later life rather than family support (Lee, 1994). Although the role of family in supporting older generations has decreased, it continues to occupy a key position in their happiness, with extended public welfare programmes provided by the welfare state, thus constituting cooperation between private family support and public welfare system.

Meanwhile, it is widely accepted that social studies on older people were first done in South Korea in 1973 (Park and Choi, 2008). However, it was during the 2000s that academic research into happiness in later life proliferated in South Korea (Yoon, Kim, and Heo, 2006). The previous studies of happiness in later life in South Korea can be classified into two types. One group of studies looked at the dimensions of the happiness; the other group at the determinants of happiness in later life.

Among the studies of the dimension of happiness in older people, there is the

first large-scale research that explored the dimensions of the happiness of South Korean older people. It is 'The Longitudinal Study of Quality of Life of Older People' that was conducted by the Hallym University and funded by the Korea Research Foundation between 2002 and 2004 (Shin, Bu, and Ban, 2005). The study produced three waves in total but is no longer continuing. The study was criticized by many researchers and it turned out that it was not influential. The main reasons for its failure were both limited sampling and a too low rate of response. In other words, first, the study sampled just in Seoul and Chuncheon province, which meant it was not nationally representative. Second, at least 35 per cent or so of respondents were dropped in the third interview. Subsequently, a few nationally representative surveys were undertaken on the dimensions of happiness of older people, such as the 'Korean National Health and Nutrition Examination Survey', the 'Korea Welfare Panel Study', and the 'Korean Labour and Income Panel Study'.

There are several studies focused on the determinants of happiness in later life, but they are all small-scale. For example, Han (2002) surveyed 1,004 older people aged 60 and over and living in Seoul. He found that being better educated and occupying a higher position in the workplace positively affect overall economic happiness. Park (2006) analyzed 308 older men aged 55 and over and living in Seoul. She found that re-employed older men showed higher level of mastery than those not re-employed after retirement. Bae (2006) surveyed 443 older people aged 60 and over and living in their homes in Daejeon, Gyeongnam, and Gyeongbuk provinces. She found that the quality of the relationship with spouses positively influences the happiness of older people. Choi (2010) analyzed 100 older people aged 65 and over and living in Seoul. He found that there was significant negative association between the degree of depression and the overall level of happiness in older people. He also reported that those who have a higher level of self-esteem showed higher levels of happiness.

Ultimately, there is no elaborated empirical research not only on the changed intergenerational solidarity and its interaction with welfare systems for people in later life but also their impact on the happiness in later life in contemporary South Korea. Therefore, this thesis aims to develop this academic gap.

1.4. Thesis Outline

The following chapters comprise broadly five parts: context setting with research questions, literature review, methodology, empirical findings, and conclusion.

Chapter 2, as a part of setting the context of the thesis, accounts for the relationship between the demographic transformation, intergenerational solidarity, and the government's social policy. Specific research questions are suggested based on this relationship.

The literature review consists of two chapters. The chapter 3 first explains the concept of generation, then accounts for the theory of intergenerational solidarity, followed by an explanation of the connection between Confucianism for filial piety in South Korea and intergenerational solidarity. Second, the theories of intergenerational conflict as well as intergenerational ambivalence are discussed as a critique of the theory of intergenerational solidarity. Finally, the theory of happiness is discussed. Chapter 4 explains the public pension systems for later life in contemporary South Korea.

Chapter 5, on methodology, first draws the research hypotheses based on the previous studies. Then the data set, the Korean Longitudinal Study of Ageing (KLoSA), is explained, detailing the operationalization of all KLoSA relevant variables and followed by a strategy of analyses.

The part dealing with empirical findings is composed of four chapters. Chapter 6

addresses the first research question, namely the characteristics of intergenerational solidarity, public pension systems, and the happiness of middle-aged and older people by gender. The chapter 7 explores the significant relationship between the general determinants, i.e. the socio-demographic and economic status as well as health condition and the degree of happiness and how it differs between middle-aged and older people by gender. The chapter 8 addresses the second research question, namely the significant relationship between intergenerational solidarity and the degree of happiness and its differences between middle-aged and older people by gender by means of conducting hierarchical multiple regression. Chapter 9 addresses the third research question, namely the significant relationship between the public pension systems and the degree of happiness in later life by gender by conducting hierarchical multiple regression.

Finally, in the conclusion, chapter 10 summarizes the key findings together with suggesting relevant policy implications based on these findings. Several limitations of KLoSA are explained, followed by concluding remarks.

Chapter 2

Setting the Context

2.1. Introduction

This chapter aims to explain how two critical elements influencing happiness mentioned in chapter 1, namely family support and governmental policy, are interwoven with the demographic transitions. Accordingly, this chapter first presents evidence regarding one of the most important demographic transformations including total fertility rate, marriage and divorce change, life expectancy, and family composition. Then it accounts for the way in which those demographic transitions change intergenerational solidarity. Third, this chapter explains the major social policy applied by welfare states to respond to the changing intergenerational solidarity. Finally, specific research questions are drawn, based on the reasoning.

2.2. Demographic Transitions and Changing Intergenerational Solidarity

Demographic transition is not just about the change of the population itself; it transforms more than that (The Royal Society, 2012; Harper, 2007). Among the transformations, fertility decline, a decrease in the number of marriages, increasing divorce rates, longevity, an increase in the number of older people, and co-survivorship are the critical elements influencing not only family structures but also family relations (Silverstein, Bengtson, and Litwak, 2003; Dykstra, 2004; Tobio, 2004; VanderVen, 2004; Swartz, 2009; ESCAP, 2009; Phillipson, 2010). These demographic changes reflect the fact that the issue of multi-generational relationships has become more important than ever before (Bengtson et al., 2003; Putney and Bengtson, 2006; Lundholm and Malmberg, 2009; Dyson, 2010; EU, 2010).

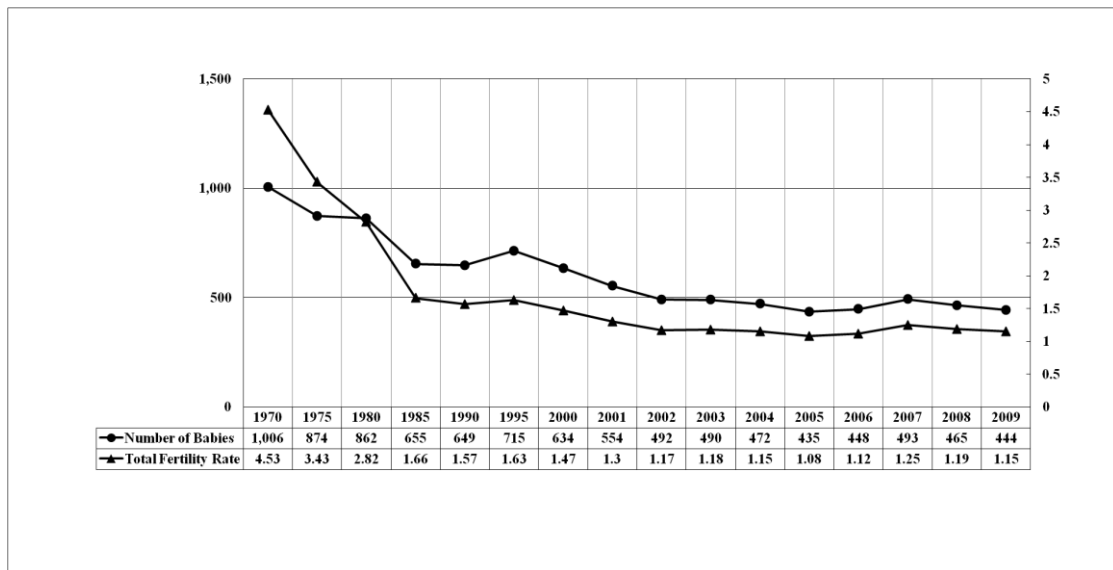
Generally, the total fertility rate¹ has shown a remarkable decrease globally since the 20th Century (Marsh et al., 2009; Neyer, 2003, 2006). In particular, the effect of the economic crisis in the 1930s resulted in the lowest level of the total fertility rate, below 2.0, although there were two exceptions: France had already experienced the lowest rate between 1910 and 1920, and the baby boom of the 1950s reflected a dramatic increase in the total fertility rate (Alders, Keilman, and Cruijsen, 2007). For instance, the total fertility rate decreased from 6.2, 2.7, 1.9, 5.5, and 2.4 in 1990 to 4.9, 2.1, 1.6, 3.4, and 1.8 in 2009 in the African, American, European, Eastern Mediterranean, and Western Pacific regions, respectively (WHO, 2011). This decreasing trend has also occurred in Asian regions. For instance, the total fertility rates decreased from 2.0 in 1990 to 1.6 in 2011 in East and North-East Asia, from 3.1 in 1990 to 2.2 in 2011 in South-East Asia, and had dropped 2.8 in 1990 to 2.1 in 2011 in Asia and the Pacific Region (ESCAP, 2011, 2012).

More specifically, as figure 2.1 shows, the total fertility rate in South Korea decreased dramatically since 1970: from 4.53 in 1970 to 1.15 in 2009 (KNSO, 2009b). This is a cumulative effect of the South Korean government's family planning programme since 1962 (Hwang, 2009). The government of Park Cheong-hee, which came into power in 1961 by a military coup, took advantage of the economic development as a justification for his authority (Jo, 2010; Holliday and Wilding, 2003). Park's government regarded the country's huge population as an evil that prohibits economic development. As a consequence, the administration implemented a demographic policy represented by three slogans: 'Bearing A Few, Raising Well' in the 1960s, 'Bearing Just Two Children Regardless of Their Sex, Raising Well' in the 1970s,

¹ The total fertility rate in a specific year corresponds to the number of children that would be born to each woman if she were to live to the end of her childbearing years and if the likelihood of her giving birth to children at each life stage followed the currently prevailing age-specific fertility rates (The Royal Society, 2012: 17; ESCAP, 2011: 247; OECD and Korea Policy Centre, 2009: 38).

and ‘Well-Raised One Daughter Is Equivalent to Ten Sons’ in the 1980s (GORK, 2012). The main goal of the policy was to reduce the birth rate by recommending contraception to married couples (Kim, 2003). The policy was highly effective in decreasing family size (ESCAP, 2008; Riley, 2008).

Figure 2.1 Total Fertility Rate and Number of Births in South Korea



Note: The unit for babies is 1,000

Source: KNSO (2010c: 4)

Furthermore, it appears that it will take a very long time to achieve a replacement total fertility rate. For example, as table 2.1 summarizes, the national survey showed that the rate of those who answered that they wanted to have a child plummeted from 90.3 per cent in 1999 to 24.8 per cent in 2009. By contrast, the rate of those who responded that having a child is not necessary increased sharply from 8.5 per cent in 1991 to 44.9 per cent in 2003. Moreover, even for those who hope to have children, the preferred number of children decreased from 2.3 in 2005 to 1.98 in 2009 on average.

Table 2.1 Change of Attitude and Preferred Number of Having Children in South Korea

Attitude to Having Children in South Korea (%), 1991-2009 (A)							
	1991	1997	2000	2003	2009		
Must have	90.3	73.7	58.1	54.4	24.8		
Not necessary	8.5	26	41.5	44.9	-		
Other	0.2	0.3	0.4	0.5	-		
Total	100	100	100	100	-		
Preferred Number of Children in South Korea (%), 2005-2009 (B)							
	0	1	2	3	4+	Total	Average
2005	0.5	8.4	58.8	25.6	6.7	100	2.3 Children
2009	1	16.5	68.4	11.5	2.4	100	1.98 Children

Source for A: MGEF (2005: 23); Lee (2010)

Source for B: MGEF (2010: 31)

Moreover, a declining marriage rate became a general trend to a large extent across Europe (Rowland, 2003; EU, 2010), particularly since the mid-1960s (Albertini and Saraceno, 2008; Dykstra, 2004; Harper, 2006). For example, overall in Europe, the number of marriages declined from about 459,000 in 1971 to around 286,000 in 2001 (Marsh et al., 2009) and the crude marriage rate² decreased from 7.9 in 1970 to 4.9 in 2007 (EC, 2010: 208). More specifically, the crude marriage rates of Austria, Belgium, Finland, France, Hungary, and Italy decreased from 7.1, 7.6, 8.6, 7.7, 9.3, and 7.4 in 1970 (UN, 1971: 730-735) to 4.5, 4.2, 5.6, 3.9, 3.6, and 4.8 in 2010, respectively (UN, 2011b: 632-644). England and Wales, more specifically, the number of marriages peaked in 1972 at about 426,000 but decreased continuously after that. In 2006, the number of marriages was about 237,000, the lowest number since 1895, which was recorded as 228,200 (ONS, 2009). Similarly, in the USA, about 71 per cent of women who were born in 1950s had married by the time they were 25 years old whereas only 54 per cent of women who were born in 1960s had married at the same age (Fitch and Ruggles, 2000).

The general trend of the decline in marriage in South Korea is very similar to

² The crude marriage rate refers to the number of marriages per 1,000 people (Harper, 2007: 9).

those countries. For example, as table 2.2 shows, the rate of a positive perception of getting married decreased continuously from 75.8 per cent in 1992 to 54.4 per cent in 2003. In addition, the rate of women who think that they should marry decreased from 73.9 per cent in 1998 to 68 per cent in 2009 (KNSO, 2009a, 2009c). This results in a continuous rise in the age at first marriage. For example, the age at first marriage of women increased from 24.78 in 1990 to 29.14 in 2011 and that of men also rose, from 27.79 in 1990 to 31.9 in 2011 (KNSO, 2012a, 2010a, 2010d). Consequently, the absolute number of marriages also declined continuously after 1980.

Table 2.2 The Perception of Marriage, Age of First Marriage, and the Number of Marriages in South Korea

Positive Perception of Marriage in South Korea (%), 1992-2003 (A)							
	1992	1996	1998	2000	2003		
	75.8	67.6	67.5	55.6	54.4		
Average Age of First Marriage in South Korea, 1990-2011 (B)							
	1990	1995	2000	2005	2011		
Female	24.78	25.32	26.49	27.27	29.14		
Male	27.79	28.36	29.28	30.87	31.9		
Number of Marriages in South Korea, 1970-2009 (C)							
	1970	1980	1990	1995	2000	2005	2009
	295,137	403,031	399,312	398,484	332,090	314,304	309,759

Source for A: MGEF (2005: 21)

Source for B: KNSO (2012a: 27)

Source for C: KNSO (2010a: 18)

These days, marriage has become easier to terminate than at any other time in history (Chambers, 2006; Wallerstein and Blakeslee, 1996). Although this trend is prevalent worldwide it is more evident in the advanced countries, mainly since the Second World War (Marsh et al., 2009; ONS, 2009; Johnson, 1998). For example, the divorce rate in EU Area increased from 16 per cent in 1998 to 20 per cent in 2005 (EU,

2010). More specifically, the crude divorce rates³ of Austria, Belgium, Finland, Germany, and Sweden increased from 1.33, 0.73, 1.55, 1.31, and 1.69 in 1971 (UN, 1992: 752-757) to 2.2, 3, 2.5, 2.3, and 2.4 in 2009, respectively (UN, 2011b: 694-699). Additionally, recent data, both the US Vital Statistics Report in 1990 and the American Community Survey in 2010, also showed that the divorce rate had increased remarkably in the USA. There, the divorce rate of people aged 50 and over increased from 4.87 in 1990 to 10.05 in 2010 (Brown and Lin, 2012).

Particularly, in South Korea, as table 2.3 shows, the number of divorces has been increasing continuously since 1970; there was a slight decrease in 2009. It is widely accepted that small little decline is because the result of implementing a new policy to decrease the divorce rate by making legal proceedings for divorce more complicated in June 2008 (KNSO, 2010c).⁴

Table 2.3 The Number of Divorces in South Korea

1970	1975	1980	1985	1990	1995	1997	1998	2000	2005	2009
11,615	16,453	23,662	38,838	45,694	68,279	91,159	116,727	119,982	128,468	123,999

Source: KNSO (1970, 1975, 1980, 1985, 1990, 1995, 1997, 1998, 2000, 2005, 2010c)

Meanwhile, development of both medical technology and sanitation brought about a substantial increase in life expectancy at birth⁵ globally, although that of women

³ The crude divorce rate means the number of divorces per 1,000 people (UN, 2001).

⁴ The effect of making legal procedures of divorce simpler on the increase in the number of divorces is also valid in the UK. In the UK, divorce was not possible before 1857 but it was possible after 1971 when the Divorce Reform Act of 1969 became valid in January 1971. After the Act, spouses could divorce after a separation of two years (ONS, 2012). Furthermore, the Matrimonial and Family Proceedings Act of 1984 relieved freed spouses from the having to be married for three years if they wanted to divorce (Macionis and Plummer, 2008). Making the legal procedures for divorce less complex, consequently, increased the degree of flexibility to choose romantic relationships and boosted the divorce rate (Johnson, 1998; Marsh et al., 2009).

⁵ The life expectancy at birth means “the number of years a newborn infant would live if prevailing patterns of age-specific mortality rates at the time of birth were to stay the same throughout the child’s life.” (ESCAP, 2011: 247)

is always higher than that of men. For example, life expectancy at birth of men increased from 49, 68, 58, 68, 59, and 68 years in 1990 to 52, 73, 64, 71, 64, and 72 years in 2009 in African Region, Region of the America, South-East Asia Region, European Region, Eastern Mediterranean Region, and Western Pacific Region, respectively (WHO, 2011). Similarly, the life expectancy at birth of women increased from 53, 75, 59, 75, 63, and 71 years in 1990 to 56, 79, 67, 79, 67, and 77 years in 2009 in the African Region, Region of the America, South-East Asia Region, European Region, Eastern Mediterranean Region, and Western Pacific Region, respectively (WHO, 2011). Increasing longevity increases the proportion of older people aged 65 and over. For instance, the rates of older people aged 65 and over increased from 18, 3.1, 4.9, 12.4, and 5.3 in 1990 to 22, 3.5, 6.9, 13.2, and 7 in 2010 in the European Region, Africa, Latin America and the Caribbean, North America, and Asia and the Pacific Region, respectively (WEF, 2012; ESCAP, 2011).

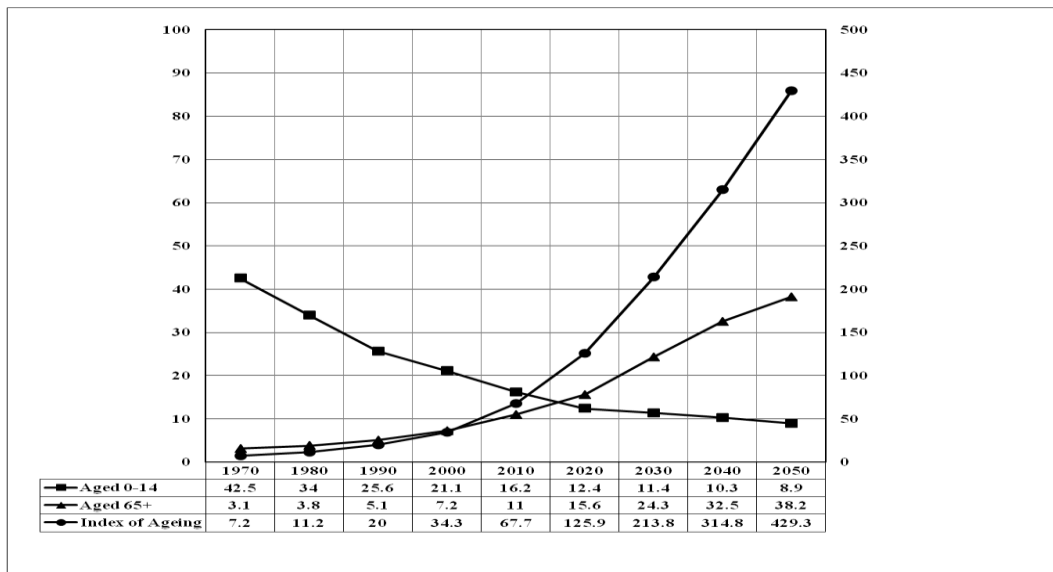
This trend is not only consistent but also dramatic in South Korea. For instance, as table 2.4 illustrates, life expectancy at birth of men increased from 58.7 in 1970 to 77.2 in 2010, while that of women increased from 65.6 in 1970 to 84.1 in 2010. Consequently, declining fertility rates coupled with an increasingly ageing population caused a dramatic increase in the index of ageing. For example, as figure 2.2 illustrates, the index of ageing was just 7.2 in 1970 but it rocketed to 67.7 in 2010. Finally, as figure 2.3 shows, it is forecast that the general demographic structure of South Korea will change from a triangle form of population pyramid in 1980 to an upside-down triangle form in 2050 because of simultaneously decreasing fertility and increasing longevity (Kang, 2009).

Table 2.4 Life Expectancy at Birth by Gender in South Korea

	1970	1980	1988	1998	2008	2010
Male	58.7	61.8	66.3	71.7	76.4	77.2
Female	65.6	70	74.6	78.5	83.3	84.1

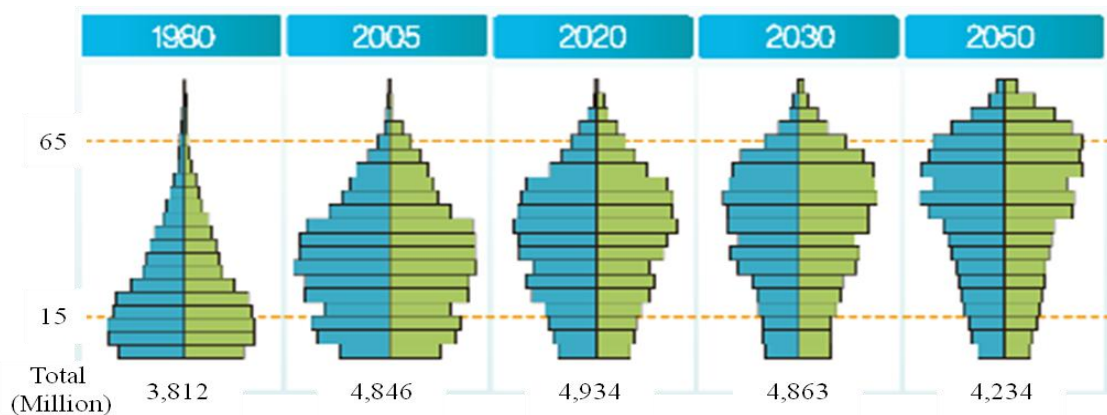
Source: KNSO (2009b: 3); KNSO and MGEF (2012: 15)

Figure 2.2 Rates of the Youth, Older People, and the Index of Ageing in South Korea



Source: KIHSA (2008: XXXIII)

Figure 2.3 Population Pyramids in South Korea



Note: The left-hand side of the population pyramid indicates men, the right-hand side indicates women.

Source: GORK (2012: 26)

Furthermore, a meltdown in the traditional family composition, described as ‘a quiet demographic revolution’ (Elman and Uhlenberg, 1995), had occurred in South Korea since the 1970s. In other words, as table 2.5 illustrates, the incidence of extended families decreased from 18.8 per cent in 1970 to 6.9 per cent in 2005 whereas those of nuclear family increased from 71.5 per cent in 1970 to 82.8 per cent in 2005. Similarly, the incidence of one-generation households increased from 13.1 per cent in 1980 to 40.4 per cent in 2010 while that of three-generation households plummeted from 16.5 per cent in 1980 to 4.9 per cent in 2010.⁶ Furthermore, the proportion of older persons living alone continuously increased from 3.7 per cent in 2000 to 6.6 per cent in 2012.

Table 2.5 The Family Composition of South Korea

		1970	1980	1990	2000	2005		
Family Type (%, A)	Extended Family	18.8	11	10.2	7.9	6.9		
	Nuclear Family	71.5	72.9	76	82	82.8		
		1980	1985	1990	1995	2000	2005	2010
Generations in Ordinary Household (%, B)	One Generation	13.1	16.5	19.7	25.4	29.7	36.2	40.4
	Two Generations	68.5	67	66.3	60.8	60.8	55.4	58.2
	Three Generations	16.5	14.4	12.2	8.2	8.2	6.9	4.9
	More than Three Generations	0.5	0.4	0.3	0.2	0.2	1.4	0.1
Older Person Living Alone (%, C)		2000	2002	2004	2006	2008	2010	2012
		3.7	4.2	4.6	5.1	5.6	6.1	6.6

Note: The extended family consists of a married couple with parents and children. The nuclear family comprises a married couple.

Source for A: KIHSA (2008: 81)

Source for B: KNSO (1980, 1985, 1990, 1995, 2000, 2005, 2010; MGEF, 2010)

Source for C: KNSO (2012b: 10)

Meanwhile, it should be noted that these demographic transitions change

⁶ This trend was primarily attributable to the so-called ‘Miracle of Han River’ of South Korea, indicating the huge economic development within a very short period of time. In other words, industrialization after the Korean War had led to rapid urbanization and internal migration from rural provinces to urban areas, particularly to the capital, Seoul (Lee, 1997).

intergenerational solidarity in various ways (Achenbaum, 2007; Harper, 2007; Murphy, 2007). Regarding the decline in the total fertility rate, Harper (2006) provides some profound implications. As she (2006: 196) maintained, that “declining fertility implies a reduction in the number of kin available to provide”, the declining trend of the total fertility rate significantly changes intergenerational solidarity by decreasing the number of children who can provide more frequent face-to-face meetings, contact via other communication channels, financial support, physical support, emotional support, and so on among family members (Lindholm and Malmberg, 2009; Spitze and Logan, 1990; Attias-Donfut, Ogg, and Wolff, 2005). In other words, because more family members provide more opportunities to supply intergenerational solidarity, decreased fertility implies that the amount of associational solidarity, affectual solidarity, functional solidarity, and so on in place in the 2000s is less than that of the 1990s (Grundy, 2007; Antonucci and Ajrouch, 2007; Tennstedt, Crawford, and McKinley, 1992). For example, in South Korea, older women in their 60s had around 4.4 children on average to support them in 1990s; this number declined to approximately one or two children by the 2000s (East-West Centre, 2002).

Moreover, marriage decline changes intergenerational solidarity by making the family structure ‘truncated’ (Rosenthal, 2000: 51). In other words, marriage decline is strongly associated with a family’s postponing their decision in having their first baby; this extends the intergenerational space as most babies are still born in wedlock (Harper, 2006, 2007). This will finally reduce the possibility of having more children, i.e. decreased availability of children will directly undermine the structural solidarity (MGEF, 2010; Wolf, 1994). Accordingly, it seems that the decreased availability of children will reduce the possibility of frequent face-to-face meetings with the elderly as well as contact through other communication channels (Keck and Saraceno, 2008; Spitze and Logan,

1991).

By contrast, an increasing divorce rate increases not only structural solidarity in terms of geographical proximity but also affectual solidarity in terms of the emotional distance between generations (Curran, McLanahan, and Knab, 1998), thereby reducing the number of positive opportunities for building or enhancing intergenerational solidarity between generations (Izuhara, 2010a). Divorce also undermines associational solidarity by making it difficult to maintain the contact and meetings between generations (Albertini and Saraceno, 2008; Timonen, 2008; Rosenthal, 2000; Cooney, 1994). This is primarily because of the constraints of time and loyalty (Kalmijn, 2008). In other words, adult children whose parents divorced should divide their limited time to meeting or making contact with both of them. Moreover, they usually feel the conflicting loyalty to their divorced father when they meet their divorced mother, and vice versa. Additionally, grandparents experience difficulty in maintaining face-to-face meetings and contact with their grandchildren when their middle-aged children get divorced. Divorce also affects functional solidarity. For example, an older parents' divorce may decrease the possibility of receiving provisions from adult children to older parents (Ganong and Coleman, 2010). White (1992) analyzed 2,400 people aged 18 to 65 sampled from the National Survey of Families and Households and found that divorced older parents provide less support with adult children than those did not divorce in the USA. Amato, Rezac and Booth (1995) analyzed 471 older parents and adult children and found that the degree of intergenerational transfer decreased between divorced older fathers and adult children in the USA.

Furthermore, longevity changes the intergenerational solidarity. In other words, increased life expectancy increases 'the co-survivorship across generations' (Bengtson, 2001: 6) as well as the 'generational overlap' (Rosenthal, 2000: 47). Consequently, the

family structure will resemble ‘a bean pole family structure’ (Bengtson, Rosenthal, and Burton, 1990; Uhlenberg, 1996) as the horizontal ties including siblings, cousins, aunts, and uncles decline in number (Phillipson, 2010; Knipscheer, 1992) while the vertical ties such as those with (great-) grandparents increase (Hagestad and Uhlenburg, 2007; Bengtson and Harootyan, 1994). Harper (2006: 181) accounts for this as the ‘verticalization of the family structure’ which extends the duration for each role as a family member such as parents, children, and (great-) grandchildren, and so on.

For example, most of children born in the 2000s are more likely to have at least one grandparent than before and the vast majority of grandparents are to see their grandchildren grown to adulthood (Mills, Wakeman, and Fea, 2001; Silverstein and Marengo, 2001): Around 91 per cent of children born in 2000s are more likely to have grandmothers until they reach 20 years old than those born in the 1900s at the same age (Uhlenberg, 1996). Similarly, the possibility of grandchildren living with four grandparents at birth has increased from 23.8 per cent in 1900s to 67.8 per cent in the 2000s (Hoff and Tesch-Romer, 2007). Leach and colleagues (2008) analyzed the first wave of the English Longitudinal Study of Ageing (ELSA) and also reported that 43 per cent or so of adult children aged between 50 and 57 had mothers still alive (approximately 79.8 years old) as well as around 20 per cent of same group of adult children had fathers still alive (approximately 80.7 years old) in 2002 in the United Kingdom. The picture is very similar in the USA. In other words, the rate of 10 years olds living with four grandparents increased from 6 per cent in 1900s to 41 per cent in 2000s (Hagestad and Uhlenberg, 2007).

This results in having to spend more time on performing intergenerational family roles among family members than before (Veron, Pennec, and Legare, 2007; Harper, 2007). Similarly, Attias-Donfut, Ogg, and Wolff (2005: 161) mention that “increased life

expectancy, combined with a decrease in the number of children per family...is transforming the structure of the timing of transfers". Timonen and Arber (2012) also show that longevity extends the boundaries of grandparenting. It should also be noted that the gender issue has to be considered because older women outlive older men in most societies (Arber and Ginn, 2005).

A changed family composition also changes intergenerational solidarity. The collapse of the extended family, the increase in one-generation families as well as the increase of older persons living alone mean that the possibility of intergenerational co-residing decreases, and thus the intergenerational solidarity also changes. In other words, decreased intergenerational co-residing increases the structural solidarity in terms of the geographical proximity between generations, but decreases the duration spent together with other generations (Dyson, 2010; Lindholm and Malmberg, 2009). Owing to the closer geographical proximity and sharing more time between generations mean the more opportunities of the associational solidarity in terms of the face-to-face meeting as well as the functional solidarity in terms of providing physical and emotional support among family members (Antonucci and Ajrouch, 2007), decreased extended family, increased one generational family, and increase of older persons living alone implies that the associational solidarity and the functional solidarity will be reduced. For example, Spitze and Logan (1990) analyzed 8,516 older people aged 65 and over sampled from the Supplement on Aging to the National Health Interview Survey. They found that older people who lived together with more children receive more face-to-face meetings and physical support.

2.3. Welfare States' Social Policy in Response to the Changing Intergenerational Solidarity

Because the family is the most important source for caring for older generations (Grundy and Henretta, 2006; Lillard and Willis, 1997; Markides, Boldt, and Ray, 1986), it is unequivocal that changed intergenerational solidarity and seriously undermined traditional family support system caused by the dramatic demographic transformation (Fu and Hughes, 2009; Kunemund, 2006; Teo et al., 2003; Cremer, Kessler, and Pestieau, 1994; Mason et al., 1994) will be detrimental to the happiness in later life (Keasberry, 2001; Bengtson, 2001). For example, Alesina and Giuliano (2007) analyzed both the World Values Survey and the Multinational Time Use Study and found that weak family ties and support for older parents decrease their degree of happiness. This implies that without proper alternatives for responding to this changed traditional family support system, people in later life will be seriously unable to manage their life as meaningfully (Bengtsson and Fridlitzius, 1994).

This decline in family support put pressure on governments to create public welfare systems for keeping or enhancing the happiness of people in later life (Bengtsson and Fridlitzius, 1994). As a result, changing intergenerational solidarity will negatively affect happiness in later life became a central policy agenda in every government. Many countries have implemented or reformed various public welfare programmes to mitigate potential problems caused by changing intergenerational solidarity; and these programmes play a key role in the happiness of older generations, together with family support these days (Knijn, 2004; Daatland and Lowenstein, 2005; Kunemund, 2008).

Historically, it was the developed Western welfare states that forecast the problem of population ageing and started preparing or reforming the social policies to

respond to that agenda in advance (TUC, 2012; Jessoula, 2012). As McGillivray (2000: 3) explained, “in the industrialized countries, demographic change is the basis for the call for reform of public pension”, the most noticeable social policy area for reacting to population ageing was pension reform (Hausermann and Schwander, 2012; Hinrichs and Jessoula, 2012; Zaidi, 2010). For example, most European countries, such as the United Kingdom, Sweden, Finland, Denmark, the Netherlands, France, Germany, Italy, and Switzerland, reformed their pension systems to make them sustainable in spite of the problems caused by population ageing (Anderson, 2012; Borsch-Supan, Coppola, and Reil-Held, 2012; Grech, 2010; Schludi, 2005; Orloff, 1993). They broadly reformed ways of financing, benefiting, contribution rate, administrative efficiency, and eligibility in anticipation of the projected welfare cost for older generations (Ploug, 2012; Hausermann, 2010; Stahlberg, Kruse, and Sunden, 2005; Clark, 2003; Gillion, 2000).

Recently, the responses by the European welfare states to population ageing are mainly based on the concept of ‘active ageing’ (Walker, 2002). For example, European countries have been discussing common social policy issues through the Lisbon Strategy (or Lisbon Agenda) since 2000 and the policy for responding to ageing problem was one of the key agendas (Maltby and Deuchars, 2005). In addition, responding to the European Union’s economic policy committee’s projection that “ageing populations could lead to increased expenditure on public pension of between 3 and 5 percentage points of GDP” (EPC, 2001: 30), most of the European countries continued reforming their pension systems to make them sustainable. Regarding the re-employment policy for an older population, the European Employment Strategy, which has been in place since 1997, was a recent pioneer. Two main goals were set during the Spring Summit: achieving about 50 per cent of employment rate of older people by 2010 and increasing the retirement age by five years by 2010 (Maltby and Deuchars, 2005).

By contrast, Asian countries that are characterized as having strong family support systems traditionally did not provide broader welfare systems for older people. Instead, they left the responsibility for the support for older parents to each family, thereby they prioritized economic development while investing little amount of social expenditure (Ku and Finer, 2007; Ramesh, 2004; Gough, 2004; Tang, 2000). However, it is not possible for every Asian government any more due to the dramatic population ageing thereby each government started taking more responsibility for supporting older people, namely governments implemented new welfare programmes or reformed the existing welfare programmes for older people (Fu and Hughes, 2009; Shi and Ku, 2009; Hwang, 2009). The major similarity between those welfare policies is not only to increase the level of de-commodification, namely people are less likely to rely on the labour market, but also the degree of de-familization, i.e. people are less likely to count on family support (Esping-Andersen, 1990, 1999; Fu and Hughes, 2009).

For example, the Japanese government's financial transfers either via pension or tax increased the rate of intergenerational distribution by over 20 per cent and over 40 per cent of older people aged 60 to 69 and over 70, respectively (Mason et al., 1994). Furthermore, the Japanese government increased social expenditure for cash benefits for older people almost 18 times more, from about 1,780 billion Yen in 1990 to about 34,810 billion Yen in 2003 (OECD, 2010). The rate of GDP for supporting the pension system also increased almost twice, from 4 per cent in 1990 to 7.5 per cent in 2007 (OECD, 2012a). Additionally, Japan introduced both the Long-term Care Insurance for older people and Social Welfare Law in 2000 (Tokoro, 2009; Ogawa, 2005).

China firstly officially used the word 'social security' during the 7th Five Year Plan for 1986-1990. One of its policy goals was to cover both social insurance and social welfare for older people (Leung, 2005b). The former refers to old-age pension and

medical insurance and the latter mainly indicates the institutional care. China reformed both social insurance and social welfare through the plan. For instance, the Chinese Pension System was extended to the non-state sectors during the 1990s (Chen and Fu, 2009). Moreover, around 90 per cent of residential care for 1.25 million people targeted only older people in 2002 (Leung, 2005b). More recently, the Social Insurance Law 2010, which aimed to extend the coverage of all branches of Chinese social security, went into effect in July 2011 and the Chinese government plans to cover all people through old-age social insurance schemes by 2012 (ISSA, 2012).

The Taiwanese government's expenditure on social security increased from 1.3 per cent of GNP in 1960 to 9.3 per cent of GNP in 2001 (Hill and Hwang, 2005). Based on this, Taiwan implemented diverse welfare programmes for older people. For example, it introduced the Middle Low Income Elderly Allowance Programme in July 1993, National Health Insurance in 1994, the Older Farmers' Allowance in 1995, and the National Pension Insurance Programme covering those aged from 25 to 64 in October 2008 (Fu and Lu, 2009; Chen, 2005).

The Hong Kong government enacted the Mandatory Provident Fund Scheme Ordinance, which forced all employers to support their employees' retirement in 1995, and initiated the Mandatory Provident Fund nationally in 2000 (Leung, 2005a). Moreover, the government invested 1.51 billion US Dollars for both Old Age Comprehensive Social Security Assistance and Old Age Allowance in 2006 (HKSWD, 2007). Thanks to the increased revenue, older people aged between 65 and 69 can apply for the Normal Old Age Allowance even though they have to be means-tested (Ku, 2003). When they reach the age of 70 years, they are qualified to apply for the Higher Old Aged Allowance, which does not apply a means test (Chou, 2009).

The Malaysian government did not implement any specific welfare policy for

older people until 1995 (Ong, Phillips, and Hamid, 2009) mainly because of limited revenue and because the problem of population ageing was relatively ill-perceived by the policy makers (Omar, 2005). However, since proclaiming the National Policy for Elderly, both the National Advisory and Consultative Council for the Elderly and the National Senior Citizens Policy Technical Committee were established in May and July 1996, respectively. The new bodies introduced or reformed the Pension Programme, Employees Provident Fund, and Elderly Assistance Programme.

The Thai government established the Working Committee on Policy and Action for the Elderly in 1992 to respond more progressively to the ageing problem. This organization instituted the Essence of the Long-term Policies and Measures for the Elderly for 1992-2011 that played a key role in implementing several new welfare programmes for older people. For instance, it introduced a free medical service, a social service centre and senior citizens' clubs for older people (Pussayapibul, Srithamrongsawat, and Bundhamcharoen, 2009). The government also implemented the Old-Age Allowance Programme in 1993 and in April 2009 extended the conditions for participation by providing a monthly allowance for deprived older people (Barrientos, 2012).

2.4. Research Questions

So far, we have explored the general relationships among the demographic transitions, changing intergenerational solidarity, and government's social policy in response to the changing intergenerational solidarity. Two key points can be drawn from them.

On the one hand, the evidence above clearly reflects that the change in intergenerational solidarity caused by the demographic transformations means a change

in the traditional family support system for older people in contemporary South Korea (Park, 2003; Cho and Jang, 2007). Considering evidence that the family relationships are one of the most important components that significantly determine the level of happiness across all ages (The Royal Society, 2012; Vandeleur, Jeanpretre, and Perrez, 2009; Sheykhi, 2007; Hughes and Waite, 2004; Fernandez-Ballesteros, 2002; Ball et al., 2000), and in particular, that the relationship is more critical during later life (Katz and Lowenstein, 2003; Motel-Klingebiel, Tesch-Roemer, and von Kondratowitz, 2003), one can argue that happiness in later life would be altered in keeping with the shift of the intergenerational solidarity. Furthermore, it should be noted that since South Korean families are characterized as having very strong intergenerational solidarity among family members and had been strongly expected to care for their parents in accordance with Confucianism for filial piety (Kamo, 1998; Kwon, 1999; Hashimoto and Ikels, 2005; Mehta and Leng, 2006), even traditionally those who practiced filial piety well were honoured by the state (Suh, 1990; Kim, 2003; Eun, 2003; Park, Sohn, and Jeon, 2008), the impact of the changing intergenerational solidarity on the happiness will be substantial.

On the other hand, the South Korean government responded in two ways to the change in the traditional family support system caused by the changing intergenerational solidarity. One is by providing financial support, the other, caring support. For this, the South Korean government invested more revenue for providing a cash benefit for older people – around six times more – from 1,114 billion won or so in 1990 to about 7,937 billion won in 2003 (OECD, 2010). The rate of GDP for the pension programme increased twice, from 0.6 per cent in 1990 to 1.2 per cent in 2007 (OECD, 2012a). As a result, the South Korean government reformed the National Pension Scheme, the most comprehensive and contributory income security programme for older people, more

progressively twice during the late 1990s and early 2000s (OECD, 2012a, 2010; MHWFA, 2009; Seok, 2003). The South Korean government not only implemented the new public pension programme, namely the means-tested Basic Old-Age Pension, in 2008 for enhancing old-age income security but also introduced Long-Term Care Insurance (LTCI) in 2008 to provide a public care system for older people.⁷

Meanwhile, with regard to this extension of social welfare programmes, several scholars suggest that extending welfare programmes and providing at higher level of social expenditure for a particular welfare programme such as a social service for older people increased the happiness of older people. However, they argued it without empirical evidence but by usually calculating only the increased amount of the government's social expenditure (Pacek and Radcliff, 2008; Dahl and Wel, 2013). Similarly, the South Korean government argued that progressive reform and newly introduced social welfare programmes for older people increased their happiness (MOHW, 2011a, 2001; GORK, 2010).

Although some scholars, such as Schludi (2008), Mayer and Hillmert (2003), Kruger (2003), Marshall and Mueller (2002), Kohli (1986), generally argued that the arrangement of the welfare state has the power to institutionalize the fundamental structure of human life, none of logical relationship between the social welfare programme extension with an increased amount of social welfare expenditure and happiness can be established without sophisticated empirical evidence. In fact, Esping-Andersen criticized this inappropriate approach (below). Notwithstanding, almost none of sophisticated empirical studies on the relationship between the happiness in later life and social welfare policies still exist (Gyarmati, 2011).

⁷ The LTCI is only provided to older people in serious physical or mental conditions after formal screening procedures; consequently, there are not many recipients as compared to other welfare programmes for older people. This thesis therefore focuses on both the National Pension Scheme and the Basic Old-Age Pension.

“...focus on spending may be misleading. Expenditures are epiphenomenal to the theoretical substance of welfare states ... by scoring welfare states on spending, we assume that all spending counts equally.” (Esping-Andersen, 2006: 161)

Consequently, the following three specific research questions can be drawn from the above reasoning.

- *Research Question 1:* What are the characteristics of intergenerational solidarity, public pension systems, and happiness in later life in contemporary South Korea? Are there any differences between middle-aged people and older people by gender?

- *Research Question 2:* How does intergenerational solidarity significantly determine the degree of happiness in later life in contemporary South Korea? Are there any differences between middle-aged people and older people by gender?

- *Research Question 3:* How do the public pension systems significantly determine the degree of happiness in later life in contemporary South Korea? Are there any differences between female and male older people?

2.5. Conclusion

In this chapter, we have explored the logical link between demographic transformations, intergenerational solidarity, and government’s social policy. Since the start of the industrialization period in South Korea, the ensuing dramatic demographic changes – such as total fertility rate, marriage, divorce, life expectancy, and family composition – have left a lasting impact on intergenerational solidarity. This has led to an alteration in

the traditional family support system for later life in contemporary South Korea. Many studies reported that family support is one of the most important components that significantly determine the level of happiness in later life. Therefore, it is transparent that the happiness in later life would be changed due to the shift of the intergenerational solidarity. Accordingly, the South Korean government responds to the change through implementing or reforming mainly the old-age income security policy, namely the public pension systems such as the National Pension Scheme, which is the contributory system, and the means-tested Basic Old-Age Pension. However, there are no sophisticated studies that analyze the dynamics. Therefore three specific research questions were suggested, based on the logical linkage. In the next chapter, we will review critically the relevant key literatures on this theme.

Chapter 3

Theoretical Background

3.1. Introduction

This chapter aims to build the theoretical background by critically reviewing the key literatures most relevant to this thesis. It consists of four main parts. First, the several concepts of generation are reviewed in order to explain that the thesis adopts the concept of family generation. Second, the theory of intergenerational solidarity is explained. It accounts for the concept of intergenerational solidarity as well as its six specific dimensions. Then the explanation for the way in which Confucianism for filial piety in South Korea can be linked with the theory of intergenerational solidarity is set out. Third, one of the most important criticisms of the theory of intergenerational solidarity is discussed, focusing on alternative perspectives such as the theories of intergenerational conflict and intergenerational ambivalence. Finally, the diverse perspectives on happiness, such as philosophical and social scientists' discussions, are explained together with their implications to the present thesis, followed by the chapter summary.

3.2. The Concept of Generation

We often use the term 'generation' to simply express differences among certain age groups such as 'the older generation', 'the X generation', and 'the N generation', and so forth (Pilcher, 1994). However, the concept of generation is not so simple; rather it means much more differences among age groups. For instance, Kohli (2008) accounts for the power of the conception of generation as follows:

“What is clear, however, is that the concept of generation is a key to the analysis of social dynamics. In the sequence of generations, families and societies create continuity and change with regard to parents and children,

economic resources, political power and cultural hegemony. In all these spheres generations are a basic unit of social reproduction and social change.” (Kohli, 2008: 198)

Academically, the concept of generation can be classified into two dimensions, namely the genealogical generation at an individual level and historical generation at a societal level. The genealogical generation refers to “the relationships between individuals who have a common ancestor” (Alwin and McCammon, 2006: 25). In kinship studies, it refers to the lineage among family members. Attias-Donfut and Arber (2000) use this as ‘family generations’. Related to this, generation also means the duration or period of years distinguishing parents from children (Attias-Donfut and Arber, 2000). The genealogical generation therefore varies in each society according to the average age of giving birth to babies.

By contrast, the concept of historical generation, also often called societal generation, goes beyond genealogy, and attempts to link individuals with social structure. It refers to “people born at about the same time and who therefore experience historical events at the same times in their lives” (Alwin and McCammon, 2006: 25). This sounds similar to the concept of the birth cohort, but it must be differentiated (Glenn, 2005). The concept of historical generation was originally suggested by Karl Mannheim (1952), even though many ancient Greek philosophers also considered the relationship between genealogical generations and social change (Pilcher, 1994).

Mannheim started discussing this concept by criticizing both the positivists and the historical romanticists, who tried to build the universal law of historical development based on the individual’s biological law or mechanism. Mannheim criticized them by stating that they ignored the social factors affecting social change. To Mannheim, generations meant a group of people sharing a similar culture and identity by

experiencing the same historical events (such as the Second World War) at the same time (Kohli, 1996). This implies that generations are a unique historical phenomenon, outside birth cohorts – individuals are defined by both historical and social processes in forming a certain social generation (Becker, 2000; Pilcher, 1994).

The concept of historical generations has several distinct characteristics. First, whilst a birth cohort is statistically more easily captured, the boundaries of generations are not easily identified without a certain analytical question or a framework. Second, since generations are distinguished by historical events, if such events are not distinct, generations become fuzzy (Mannheim, 1952). Third, whilst each birth cohort can be counted as a homogenous group, generations are heterogeneous (Alwin and McCammon, 2006), in particular contemporaries are more stratified by geographically and culturally than the past. Thus there are generational units, namely the kinds of generations that are defined according to the relevant group of historical events (Mannheim, 1952). Therefore, generational experiences are different, when considering class, country, region, ethnicity, and so forth. For example, even though younger citizens led the American Civil Rights movement in the 1960s, their generational experiences differed according to their class, region, and ethnicity (Alwin and McCammon, 2006).

These Western concepts of generation can be applied to the South Korean context. In other words, South Koreans use both concepts in the same way. For example, South Koreans use parents, grandparents, children, and so on in a genealogical way, namely as family generations. Moreover, they also use the Western historical generation concept, such as ‘The Japanese Colonization Generation’, ‘The Korean War Generation’, and ‘The IMF Generation’, and so on. The present thesis adopts Attias-Donfut and Arber (2000)’s ‘family generations’ concept rather than Mannheim (1952)’s historical generation concept because the thesis refers to people in later life in a genealogical way

rather than a historical way.

3.3. Theory of Intergenerational Solidarity

3.3.1. The Concept of Intergenerational Solidarity

Traditionally, solidarity did not receive much attention from social scientists outside of theories surrounding conflict (Bengtson and Oyama, 2007). Contemporary sociologists argue that demographic changes coupled with social and economic changes such as increased geographical mobility and prevalent individualism make family cohesion less important to people emotionally as well as materially than before (Giddens, 1992, 1990; Scott, Nolan, and Plagnol, 2009). There are many kinds of definitions of family solidarity (Markides, Boldt, and Ray, 1986), and the concept of intergenerational solidarity is derivative of sociological theories, including those discussing the sociology of organization, exchange theory, and family (Katz et al., 2005).

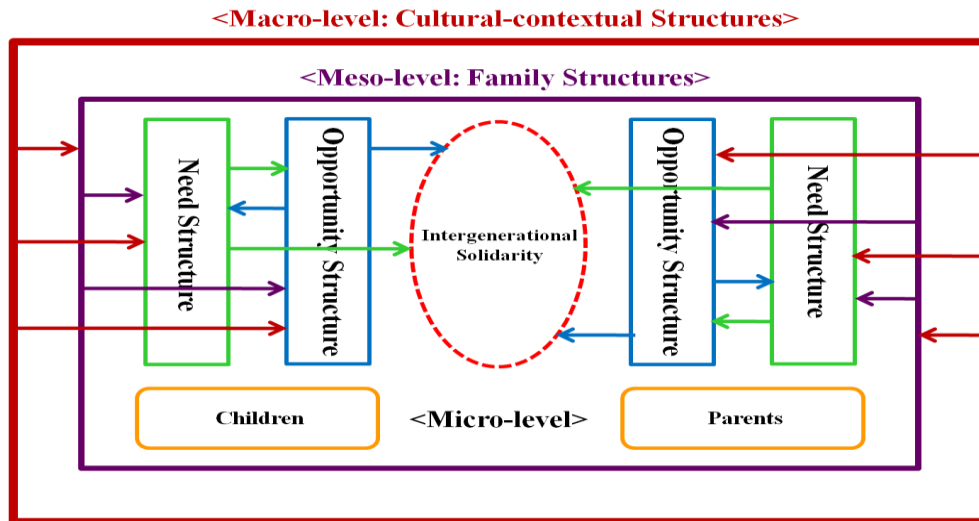
More specifically, Durkheim (1984 [1893], 2002 [1897]) argued that mechanical solidarity had changed into organic solidarity after industrialization. In other words, in a traditional society, the division of labour was simple: people not only shared similar values that make socialization easy, but also supported the existing social order. By contrast, in an industrialized society, the complex division of labour prohibits people from sharing similar values and beliefs. Accordingly, they are less likely to show strong solidarity. Industrialization thus increased individualism as well as decreasing intergenerational solidarity. Litvak and Szelenyi (1969), comparing Hungary and the US also reported that more industrialized societies lay less emphasis on an extended family but are more likely to stress the nuclear family by comparison. They added that contact

among family members will be maintained thanks to technological development even if face-to-face contact is eroded in the industrialized societies. In a similar way, Allan (1996) argued that the concept of inter-dependency between family members has become less necessary and common with industrialization.

Homans's (2009 [1950]) conceptualization of interactions, shared activity, sentiment, and norms amongst group members has some important implications. He identified four elements of group solidarity, including interactions among members of a certain group, activities of group members, feelings among group members, and the group's norms. Heider's work (1958) compliments Homans in defining concepts such as contact, liking, and similarity. Their research suggests that those who are in a more cohesive group are more likely to interact and to share similar norms for various activities (Katz et al., 2005; Trevino, 2009).

Family sociologists define intergenerational solidarity as "social cohesion between generations" (Bengtson and Oyama, 2007: 2). According to Parsons (1973), the type of intergenerational solidarity is not just one of many. Related to this, as figure 3.1 illustrates, Szydlik (2008) shows how these intergenerational solidarities are affected by not only the cultural-contextual structures but also family structures. The former indicates societal limitations including rules, norms, labour market system, and so forth, whereas the latter includes family norms, family events such as divorce and bereavements, and so on. Opportunity structures mean resources that either promote or prohibit social interaction. Need structures refer to the requirement for the solidarity such as financial, physical, emotional needs. Consequently, both need and opportunity structures which are embedded in a family are affected by not only the cultural-contextual structures but also by family structures while they influence intergenerational solidarity.

Figure 3.1 Theoretical Model of Intergenerational Solidarity



Source: Szydlik (2008: 99)

3.3.2. Six Dimensions of Intergenerational Solidarity

The milestone of researches into intergenerational solidarity “emerged from the work of Bengtson and colleagues on the University of Southern California Longitudinal Study of Three-Generation Families begun in 1971” (Allen, Blieszner, and Roberto, 2000: 916). More specifically, according to Katz (2009a, 2009b), Bengtson and Schrader (1982) firstly operationalized six principal types of intergenerational solidarities, elaborated by many other scholars including Mangen (1986), Treas and Bengtson (1987), McChesney and Bengtson (1988), Roberts and Bengtson (1990), Bengtson and Roberts (1991), Silverstein, Bengtson, and Lawton (1997), and Bengtson and colleagues (2002).

For example, associational solidarity is “the frequency and patterns of interaction in various types of activities in which family members engage” (Bengtson and Roberts, 1991: 857; Parrott and Bengtson, 1999: 76). Therefore, it can be summarized as ‘integration’ versus ‘isolation’ (Bengtson et al., 2002: 571). The typical measurement of associational solidarity is the frequency of contact between intergenerational family

members, through face-to-face meetings, telephone, mail or email (McChesney and Bengtson, 1988; Giarrusso et al., 2005).

Affectual solidarity is “the type and degree of positive emotional closeness, sentiments and evaluations about family members and the degree of reciprocity of these sentiments” (Bengtson and Roberts, 1991: 857; Parrott and Bengtson, 1999: 76).

Therefore, it can be summarized as ‘intimacy’ versus ‘distance’ (Bengtson et al., 2002: 571). Affectual solidarity can be measured through the ratings of affection, warmth, closeness, trust, respect, and perceived reciprocity for family members (McChesney and Bengtson, 1988; Giarrusso et al., 2005).

In relation to affectual solidarity, it should be noted that there is a hypothesis called ‘the intergenerational stake hypothesis’, meaning that there is a difference in the degree of affection between generations. According to Hoff (2007: 8), the intergenerational stake hypothesis denotes that “older parents consistently report higher levels of closeness and consensus in their relationships with their (adult) children than their children do in regard to the same relationship”. This is often proved by the fact that there is unequal resource exchange between generations (Birditt et al., 2012). In other words, parents provide more resource to their children than they receive from them where the intergenerational stake exists.

Trommsdorff and Schwarz (2007) reported that the beginning of the hypothesis was the ‘developmental stake hypothesis’ which was suggested by Bengtson and Kuypers (1971). Bengtson and Kuypers (1971) explained that the discrepancies in perception of the relationship result from the different developmental stage, namely the young try to gain independence from their parents whereas the old want to maintain the generational continuity. In a similar way, Ponzetti (2003) explained that the source of the stake is the perceptual differences in generational values. In other words, parents try to transmit their

family values to their children whereas children want to establish their autonomy. Hoff (2007) also indicated that fundamental differences result from the different perceptions. In other words, whilst parents try to preserve family cohesion, children are more likely to maintain their independence.

The intergenerational stake hypothesis has been well supported by many empirical studies. For example, Fingerman (1995) found that older mothers underestimate conflict with daughters whereas daughters overestimate it. In addition, Fingerman (1996) found that White and African-American mothers reported higher level of affection for their daughters than their daughters did, namely 75 per cent of mothers stated that their daughters were important whereas 58 per cent of daughters responded that their mothers were important. Caldwell, Antonucci, and Jackson (1998) interviewed 83 African-American and White teenage mothers and grandmothers. They found that grandmothers evaluated their relationship with mother-daughters more positively than teenage mothers did. Harwood (2001), using closeness measurement and grandparent-grandchild relationship style typology, reported that grandparents perceived a closer relationship with grandchildren than grandchildren did. Crosnoe and Elder Jr. (2002) analyzed 316 grandparent-grandchild pairs and also found that grandparents over-evaluated their positive role in relation to grandchildren whereas grandchildren did not. More recently, Birditt and colleagues (2012) tested the intergenerational stake hypothesis using the Family Exchanges Study. They analysed 970 people aged 40 and over and confirmed the existence of the intergenerational stake between older parents and middle-aged adult children. In other words, the oldest people reported a greater amount of positive but less of negative affection than middle-aged adult children did.

Nonetheless, there is still a long way to go to generalize the argument because “it appears that an intergenerational stake is not universal but is shaped by cultural

expectations of familial norms and obligations” (Swartz, 2009: 195). For example, Giarrusso and colleagues (2001) comparatively analyzed Euro-American and Mexican-American families. They found that grandfathers reported higher level of affection for their granddaughters than granddaughters’ degrees of affection for grandfathers among Euro-American families. By contrast, grandfathers reported lower levels of affection for grandsons among Mexican-American families. This reflects that “the reason for the existence of this generational bias in perceptions is still unclear” (Giarrusso et al., 2001: 457). More empirical researches into the cross-cultural differences and similarities are needed therefore to generalize the intergenerational stake hypothesis (Trommsdorff and Schwarz, 2007).

Meanwhile, consensual solidarity is “the degree of agreement on values, attitudes and beliefs among family members” (Bengtson and Roberts, 1991: 857). Therefore, it can be summarized as ‘agreement’ versus ‘dissent’ (Bengtson et al., 2002: 571). Empirically, consensual solidarity is usually captured by measuring ratings of perceived subjective accordance, orientation or similarity in values, attitudes, and beliefs (McChesney and Bengtson, 1988; Hammarstrom, 2005; Giarrusso et al., 2005; Nauck and Steinbach, 2009).

Functional solidarity is “the degree of helping or resources which is given, received, and exchanged (Bengtson and Roberts, 1991: 857; Parrott and Bengtson, 1999: 76) across generations including financial, instrumental, and emotional support (McChesney and Bengtson, 1988; Giarrusso et al., 2005: 413; Nauck and Steinbach, 2009: 3)”. Therefore, it can be summarized as ‘dependency’ versus ‘autonomy’ (Bengtson et al., 2002: 571). Functional solidarity is measured via the frequency or amount of assistance exchanged and rates of reciprocity in exchanging resources between generations (Kohli, 1999; Attias-Donfut and Wolff, 2000; Ponzetti, 2003). According to Hoff (2007: 8),

“mutuality of resource sharing and support provision is an essential precondition of functional solidarity”, thus in many researches, the practical meaning and ways of measuring functional solidarity nearly overlap with intergenerational transfer although they are not exactly the same concept in theory.

A noticeable point related to functional solidarity is the debate on the motivation for it. In other words, the reason why people perform functional solidarity with other family members is controversial. Scholars who lay an emphasis on the normative or psychological values argue that people conduct functional solidarity because of the norm of obligation to other family members (Ganong and Coleman, 2006; Parrott and Bengtson, 1999; Silverstein and Litwak, 1993; Finch, 1989; Seelbach, 1978; Gouldner, 1960), altruism (McGarry, 2012; Lillard and Willis, 1997; Lee, Parish, and Willis, 1994; Becker, 1974, 1981; Wolff, 1964), gratitude for other family members’ sacrifices for them (Brakman, 1995; Albert 1990), in response to emotional attachment to other family members (Silverstein, Parrott, and Bengtson, 1995; Cicirelli, 1993; Rossi and Rossi, 1990), and in preparation for obtaining support from their successive generations (Ribar and Wilhelm, 2002; Boyd and Richerson, 1989). However, most economists traditionally regard the motivation for functional solidarity as a way of demonstrating parents’ behaviours to their children (Duesenberry, 1949; Warsh, 1993) as well as a kind of rational choice for maximizing the benefits of investing money in children, i.e. the researchers think that parents provide resources to children in order to receive in their later life (Pauly, 1990).

In the mean time, the prominent French sociologist, Bourdieu (1996) argued that functional solidarity is one of the core elements for shaping the habitus of family members. In other words, for him, exchanging capitals including economic capital such as income and inheritance, social capital such as knowledge, and cultural capital such as

embodied cultural behaviours or tastes influences on constituting of habitus of family members. In relation to Bourdieu's argument it also should be noted that functional solidarity plays a significant role in transmitting a parent's class to the child. (Fors and Lennartsson, 2008). This means that functional solidarity plays a role of social reproduction and reinforces class privileges over generations through intergenerational transmission (Harper, 2007; Fritzell and Lennartsson, 2005; Jones, 2000).

Normative solidarity is "the strength of commitment to performance of familial roles or attitudes about the importance of the familism or of meeting familial obligation" (Bengtson and Roberts, 1991: 857; Parrott and Bengtson, 1999: 76). Therefore it can be summarized as 'familism' versus 'individualism' (Bengtson et al., 2002: 571). The extent or power of familial obligations in which adult children engage is the predictor of normative solidarity (Seelbach, 1977; Bengtson and Harootyan, 1994; Nauck and Steinbach, 2009). Therefore, normative solidarity is measured by both rating the importance of intergenerational roles and rating the strength of filial obligations.

Finally, structural solidarity is "the opportunity structure for intergenerational relationships reflected in number, type and geographic proximity of family member" (Bengtson and Roberts, 1991: 857; Parrott and Bengtson, 1999: 76). Therefore it can be summarized as 'opportunity' versus 'barriers' (Mabry and Silverstein, 2002: 571). The availability of adult children as well as their age, sex, marital condition, health, and working arrangements are also important factors of structural solidarity (Nauck and Steinbach, 2009). Empirical indicators for measuring structural solidarity include geographical residential closeness, number of family members, health conditions of family members, and so on (Lawton, Silverstein, and Bengtson, 1994).

3.4. Confucianism for Filial Piety and Intergenerational Solidarity

Historically, Confucianism has been called by such diverse names as ‘Ru Jia (儒家)’, ‘Ru Jiao (儒教)’, ‘Ru Xue (儒學)’ and ‘Ru Shu (儒術)’ (Yao, 2003).⁸ Confucianism was introduced to mainly East and South East Asian countries from China (Yao, 2003). Regarding South Korea, it was transmitted from China to Korean peninsula when there were three independent kingdoms, Koguryo, Baekje, and Silla in the peninsula (Lee, 1997). After Koguryo first accepted Confucianism by establishing ‘Taehak (National Academy of Confucianism)’ in AD 372, it spread to other kingdoms (Yao, 2000). However, Confucianism was not strong before the Chosun Dynasty, founded in 1392, because of the existence before that time of strong counter-value systems such as Buddhism and Daoism (Yum, 1988). It was the Chosun Dynasty which made Confucianism an official governing philosophy as well as a fundamental social value system which determines every person’s life (Park and Cho, 1995). Due to the present-oriented nature of Confucianism and to the Chosun Dynasty’s policy, which set Confucianism as a criterion for selecting governors, it spread more rapidly than Buddhism and Daoism (Lee, 1997; Yum, 1988).

Confucianism cannot be defined as one dimension; it encompasses diverse meanings across ethics, philosophy, political ideology, education, and so on (Nakamura, 1960). Specifically, Confucian ethics aims to clarify how human beings can achieve the autonomy and fulfil their responsibilities. Confucian philosophy is about interactive relations between heaven as the upper world, earth as the lower world, and humans as the middle world and aims set out how humans have to behave for the harmony of the world. Confucian political utopia was comprised during the Warring State Period between the eighth and third centuries (BC) in China. This is why Confucian politics seeks to find the right way for the government to achieve peace. Confucian education is carried by the

⁸ 家, 教, 學 and 術 indicate school, teaching, learning, and art, respectively.

sages, who teach four subjects: culture, conduct, loyalty, and faithfulness. They are all about the promotion of moral virtues and their application to the real world.

Above all, abstract concepts were able to be achieved through practising the two major principles in a daily life, namely, ‘Three Guiding Principles’ and ‘Five Constant Regulations’. The former indicates a courtier’s obedience to the king, a wife’s obedience to the husband, and children’s obedience to the parents (Yao, 2000). The latter includes humaneness, righteousness, courtesy, wisdom, and faithfulness (Yum, 1988). It is a family relation, which plays a core role of consisting and supporting, above all, the rules and systems of Confucianism (Yao, 2003; Bell and Hahm, 2003). Therefore, this thesis focuses on Confucianism in regard to family relations.

As Yao (2000: 170-172) stated, that “Harmony is the culmination of the Confucian way which is necessary for the peaceful life of family”, so the core value of Confucianism in the family is the strong ethical emphasis on harmony among all family members and even, in some more traditional families, with extended relatives (Eun, 2003). Therefore, if there is a conflict among family members, it is discouraged through finding a solution within the family under the name of family harmony (Song, 2011). This familial harmony is based on the general rules of hierarchy of obedience, namely that the young should obey the old and women should obey men (Kamo, 1998).

More specifically, Confucian conventions among family members are about relations between parents and children, between older brothers and younger brothers, and between husbands and wives (Hwang, 1999). First, between parents and children, the father has the power and authority to judge right and wrong as well as the responsibility for keeping harmonious relations among family members (Deuchler, 1992). For example, a daughter should get married to a man chosen by her father (Choi, 1982). Second, between older and younger brothers, younger brothers should not disobey older brothers.

Last, between husbands and wives, every wife should obey her husband and the division of family labour is divided between the husband's responsibility for external affairs and the wife's responsibility for internal affairs (Yao, 2000). Accordingly, the primary roles as a married woman were filial piety for parents-in-law, assisting her husband, and educating children (Yao, 2000). If her husband died, she should obey her son if the son is mature (Park and Cho, 1995). Furthermore, only the husband was allowed to ask for divorce (Choi, 1964).

In a daily life, these relations are more specifically represented by Confucianism both for ancestor worship and filial piety. First, Confucianism lays emphasis on ancestor worship because it regards ego as disappearing into the family whereas the Buddhism considers ego as disappearing into the cosmos (Yao, 2000). The Confucian ceremony was summarized by Ku-Zun in the Ming Dynasty of China then introduced to Korean peninsula during late Koryo Dynasty (Park and Cho, 1995). It was Chong Mong-Ju who argued that shrines should be built and people should conduct Confucian ceremonies (Deuchler, 1992). Even today, family members and close relatives still meet together for ancestor worship in the house of the eldest son in South Korea.

Second, in Confucianism, filial piety means unconditional support for parents or ancestors by providing both material and emotional resources (Ishii-Kuntz, 1997; Ng, 2002; Cheung and Kwan, 2009). Confucianism regards filial piety as everyone's lifelong service to one's parents (Kwon, 1999). This is because Confucianism assumes that all people's lives are the continuation of their parents' lives (Hwang, 1999). There are three kinds of filial piety, ranked from first to third class. First-class filial piety is to glorify parents by achieving public success, such as passing the national exam for being a governor, and so on. Second-class filial piety is not to disgrace one's parents by making a blunder. Third-class and basic filial piety is to support parents both financially and

emotionally so that they can have a decent life (Yao, 2000). This last, in particular, is expected to be carried out mainly by the eldest son, although other children also support their parents (Palley, 1992; Park and Cho, 1995; Izuhara, 2010b). Socially and culturally, those who did not obey these rules were roundly blamed or even excluded through strong social stigma (Eun, 2003).

The significance of the Western theory of intergenerational solidarity to the South Korean context can be revealed through its meaningful connection with Confucianism for filial piety. In reality, Confucianism for filial piety encompasses all six dimensions of the intergenerational solidarity. In other words, for associational solidarity, this philosophy states that children should meet and contact their parents as often as possible to comply with filial piety. Regarding affectual solidarity, children should do their best to increase positive sentiments for filial piety. Related to consensual solidarity, children should not disobey their parents for filial piety. With functional solidarity, children should provide unconditional support for parents for filial piety. Regarding normative solidarity, children should fulfil a strong filial obligation to support their parents. Finally, with structural solidarity, children should get married in order to bear children and should live close to their parents for filial piety.

3.5. Critiques of Intergenerational Solidarity Theory

3.5.1. Theory of Intergenerational Conflict

Although the intergenerational solidarity perspective can embrace broad dimensions of family relations such as emotion, value, attitude, finance, and a structural element (Silverstein, Conroy, and Gans, 2012), the model has been criticized for its bias in terms

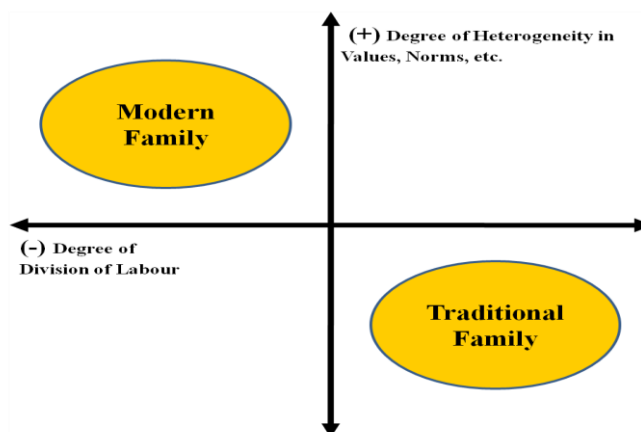
of emphasizing only the positive dimensions of family life. In other words, the model not only represents the term ‘solidarity’ per se as simply consensus or cohesion among family members (Marshall, Matthews, and Rosenthal, 1993; Daatland and Lowenstein, 2005), but it also assumes intergenerational relationships as a normative thing. The intergenerational solidarity perspective also regards the negative dimensions of family life as just an absence of solidarity (Luscher and Pillemer, 1998; Szydlik, 2008) rather than considering them as an imbalance of power and authority between generations (Luscher, 2004), which induces conflict among them (Luscher, 2000; Connidis and McMullin, 2002).

According to Black (1948), Simmel (1955 [1908]), Coser (1956), and Dahrendorf (1959 [1957]), in general, conflict is inevitable in human society and can emerge whenever there are contradictory perspectives and interests among individuals. Max Weber (1947 [1921]) argues that a conflict occurs when there is a social action in which one forces one’s own will against other’s. In a similar vein, George Simmel argues that there are conflicts in every kind of social interaction (Macionis and Plummer, 2008), such that social norms – including roles amongst family members – are structures based on power relations (McMullin and Marshall, 1999). Therefore, it is clear that there are conflicts among family members (Allan, 1996), although the types are different in each era and in different societies (Katz et al., 2005) because intergenerational conflict is culturally embedded (Gulbrandsen and Langsether, 2000).

For example, according to Parsons (1951), the traditional family versus the modern family can be distinguished mainly by two themes: the extent of division of labour and the degree of heterogeneity in values and norms. In the traditional family, the division of labour among its members was well established. In addition, authority and power among generations were clearly separated. This vertical distribution of the authority and power in the traditional family results in a higher degree of similarity of

values, norms, and so forth. However, as the extent of division of labour decreases, authority and power are more horizontally distributed in the modern family. In conclusion, as figure 3.2 illustrates below, the traditional family is located in the fourth quadrant whereas the modern family is situated in the second quadrant. This conceptual analysis by Parsons implies that the modern family is more vulnerable to conflicts among its members than the traditional family. Therefore, the possibility of intergenerational conflict breaking out when it comes to sharing an obligation to care for older parents will also be high in the modern family (Chamber, 2006). However, it should be noted that the possibility of intergenerational conflict, particularly regarding cultural and normative values may be higher in Asian countries than in Western societies (Arber and Timonen, 2012).

Figure 3.2 Distinctive Characteristics of the Traditional and Modern Family



Source: A re-designed diagram based on Parsons (1951)

Meanwhile, one of the empirically elaborated tools for estimating the degree of conflict among family members was designed by Straus (1979, 1983). The Conflict Tactics Scale (CTS) was based on the assumption that conflict is inevitable in human

relationships (Straus, 2005). Specifically, the CTS focused on evaluating how family members try to resolve conflicts among themselves. It gradually assesses the level of conflict, from mild coerciveness (such as a difference of opinion) to strong coerciveness (such as using physical force). The CTS includes 39 items that can be classified into five dimensions, such as physical violence, injury, psychological violence, sexual violence, and negotiation (Straus et al., 1996). The CTS is a milestone in that it opens the gate for scholars to quantitatively evaluate the private dimensions of family life (Langhinrichsen-Rohling, 2005). However, CTS has been criticized for being a tool that is inadequate when attempting to measure conflicts between generations as it is designed to estimate conflicts among family members generally rather than evaluating conflicts specifically between parents and children (Bengtson, Rosenthal, and Burton, 1996).

The more specific studies of intergenerational conflicts illuminated the overall extent of intergenerational conflicts and the kinds of conflicts. For example, Clarke and colleagues (1999) found by analysing the 4th wave of the University of Southern California Longitudinal Study of Generations that about two thirds of adult children and the elderly experience generational conflict. Although there can be many kinds of conflicts across generations in a daily life (Zhang and Lin, 2009; Connidis and McMullin, 2002), Clarke and colleagues (1999, 1993) categorized conflicts between adult children and older parents into six dimensions, namely (1) communication and interaction style; (2) habits and lifestyle choices; (3) child-rearing practices and values; (4) politics, religion and ideology; (5) work habits and orientations; and (6) household standards or maintenance.

3.5.2. Theory of Intergenerational Ambivalence

However, Luscher and Pillemer (1998) and Pillemer (2004) argued that intergenerational relationships cannot be described as a simple dichotomy of solidarity or conflict, but should rather be considered as ‘ambivalent’. Luscher (2000: 21) added: “I believe that the concept of ambivalence is a good point of reference (*to overcome the dichotomy between the intergenerational solidarity and conflict*), because it avoids normative assumptions and moral idealizations” (italics added by the author). Actually, people experience neither pure cohesion nor conflict with other family members. In other words, when people hope to be independent from other family members while also being aware of their dependence on them, ambivalence arises (Phillips, Ajrouch, and Hillcoat-Nalletamby, 2010). The experience of caring or being cared for in a family is a good case where contradictory emotions exist (Luscher, 2005; Wilson, Shuey, and Elder, 2003).

3.5.2.1. The Concept of Ambivalence

According to Smelser (1998) and Luscher (2004, 2005), the concept of ‘ambivalence’ was first used by the Swiss psychologist Eugen Bleuler in 1910 for analyzing psychological symptoms of ‘negativism’, although the idea was not novel. Sigmund Freud adopted Bleuler’s conceptualization of three kinds of ambivalence, including ambivalence of feelings, ambivalence of will, and ambivalence of thought, for his psychological analysis on parent-child relations and doctor-patient relations (Luscher, 2000). He also applied them to his theory of the Oedipus Complex in explaining the psychological nature of interactions between parents and children (Luscher, 2004).

The concept of ambivalence has two dimensions (Connidis and McMullin, 2002). At the subjective level, it refers to a paradox in terms of perceptions, psychological states or emotions (Weigert, 1991). At the structural level, it means a contradiction between

available resources and requirements such as roles and norms (Luscher and Pillemer, 1998; Connidis and McMullin, 2002). Whilst mainly psychologists investigated the former, sociologists studied the latter.

More specifically, classical sociologists including Emile Durkheim and Max Weber expressed implicit thoughts on the concept of ambivalence when they discussed modernization. It was Georg Simmel who discussed most closely to our current usage of the concept, namely 'in-betweenness' (Luscher, 2004). As ever, sociologists' fundamental interest in the concept of ambivalence lies with whether a certain social structure generates ambivalent experiences (Luscher, 2004). This becomes obvious when we review how contemporary sociologists perceive the concept. For example, Coser (1956) argued in his discussion on the functions of social conflict that people are exposed to ambivalent situations not because of their personality but because of their social position. In a similar way, Merton and Barber (1963: 95) regarded sociological ambivalence as "incompatible normative expectations of attitudes, beliefs and behaviour". They take an example of doctors, who should not only diagnose objectively but also show companionship to patients. In addition, particularly Merton (1976) defined sociological ambivalence as follows:

"It refers to the social structure, not to the personality ... to incompatible normative expectations of attitudes, beliefs, and behaviour assigned to a status (i.e. a social position) or to a set of statuses in a society." (Merton, 1976: 6)⁹

Meanwhile, Smelser (1998: 13) suggested that the benefit of subscribing to the concept of ambivalence lies with the explanation of the missed dimension by the rational choice paradigm, indicating that "models based on ambivalence have special power in social

⁹ Merton and Barber are criticized because they did not make a distinction between ambivalence from conflict (Luscher, 2004).

situations in which political, group, and emotional dependence is salient”.¹⁰

More recent approaches include efforts by postmodernists and feminists to develop this further. Firstly, Bauman (1991: 1) argued that people experience ambivalence when they are in a situation where they “are unable to choose between alternative actions”, More fundamentally, because postmodernists reject the logic of dichotomy (Sim, 2005), they do not agree with ‘solidarity and conflict divisions’, but rather regard current family relations as fluid and plural because of increasing divorce, co-habiting, and same-sex family dynamics (Stacy, 1998). Therefore they are in favour of adopting the concept of ambivalence to analyze intergenerational relationships (Luscher and Pillemer, 1998). Second, feminists criticize the concept of solidarity (Ferree, 1990), especially when discussing the issue of household chores. For example, for women, domestic chores can be not only the source of resentment but also a way of expressing love to family members (Thorne, 1992). In addition, women’s ambivalence is quite different from men’s regarding caretaking responsibilities, since the role of ‘women as caretakers’ is culturally taken for granted (Katz and Lowenstein, 2010; Connidis and McMullin, 2002).

3.5.2.2. Intergenerational Ambivalence

Regarding studies of the intergenerational relationships, until around the late 1990s “ambivalence has never been proposed as a general approach to the study of intergenerational relationships” (Luscher and Pillemer, 1998: 417). As mentioned above, Luscher’s concept of ambivalence denies the dialectic way of classifying

¹⁰ This does not mean that Smelser denied the rational choice model. In fact, he stressed adopting both perspectives by referring to the advantage of that model as “rational-choice principles are applicable to situations in which choice is institutionalized.” (Smelser, 1998: 13)

intergenerational relationships into solidarity and conflict (Hillcoat-Nalletamby, 2010; Steinbach, 2008). He suggested “I shall argue that the study of parent-child relations in later life must move beyond this ‘love-hate relationship.’” (Luscher, 2000: 13). He (2004: 32) added that “ambivalence may be prevalent in certain kinds of social relations especially those where dependency is an issue (*and the dependency issue*) is certainly the case for intergenerational relations” (italics added by the author). Therefore, Luscher (2000) defines the term ambivalence as follows:

“We speak of ambivalence in a social science perspective when dilemmas and polarisations of feelings, thoughts, actions and furthermore, contradictions in social relations and social structures, which are relevant for personal and societal development, are interpreting as being basically irreconcilable.” (Luscher, 2000: 16)

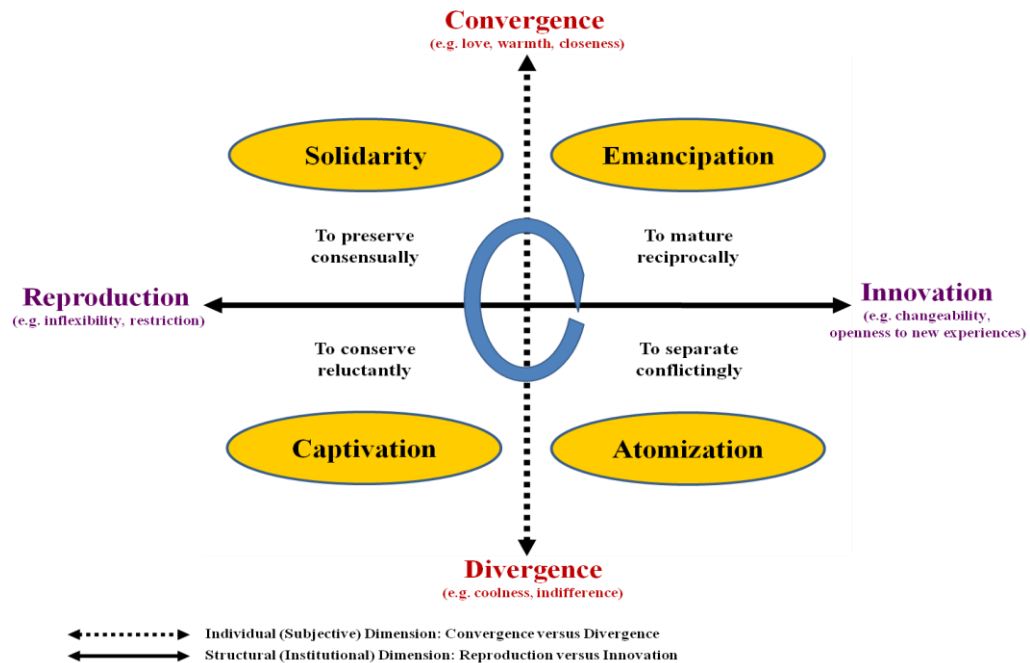
In a similar way, Smelser (1998: 5) denotes ambivalence as “the simultaneous existence of attraction and repulsion, of love and hate”. Thus intergenerational ambivalence refers to “contradictions in relationships between parents and adult offspring that cannot be reconciled” (Luscher and Pillemer, 1998: 416).

In light of Hillcoat-Nalletamby and Phillips’s (2011) argument regarding ‘the relational framework’, theoretically, the most interesting point of Luscher’s concept of intergenerational ambivalence is the link with both micro and macro social systems. In other words, the unique benefit of the concept of intergenerational ambivalence is the effect of the ‘duality of structure’, which means the social structure produces the agency, and vice versa (Berger and Luckmann, 1971; Giddens, 1984). For example, Connidis and McMullin (2002: 565) indicate that “Managing ambivalence in daily life shapes the very social structures that produce ambivalence in the first place, through either reproduction of the existing order or its transformation”.

As figure 3.3 illustrates, Luscher (2000: 17-21, 2004: 47-53, 2005: 100-104) theorized this point based on the University of Konstanz's project on intergenerational ambivalence. The individual or subjective dimension implies the differentiated development of personality between adult children and older parents. Therefore, it is characterized by 'convergence' and 'divergence'. Whilst the former indicates love, warmth, and closeness, the latter includes coolness, indifference. By contrast, the structural or institutional dimension reflects a bi-polarized situation between a willingness to keep the traditional norms or structures and a desire to change them dramatically. Hence it is characterized by 'reproduction' and 'innovation'. The former includes inflexibility, restriction whereas the latter indicates changeability, openness to new experiences.

Consequently, this mechanism produces four domains, namely emancipation, solidarity, captivation, and atomization. If a family maintains the emancipation, family members share closeness and warmth ('convergence') as well as embracing change rather than opposing it ('innovation'). Consequently, they discuss and negotiate conflicts flexibly. Meanwhile, families in the second quadrant ('solidarity'), support each other but are reluctant to change the norms. A generation, usually parents, in the third quadrant ('captivation') maintains their will to others without consensus. They use the other members of the family as a means rather than respecting each other. Finally, family members in the fourth quadrant, namely the atomization domain, do not place emphasis on cohesion among them and they are flexible on changing norms. Although Luscher clarified these four domains, they are not fixed forever. As Luscher (2005: 103) added the spiral line in the centre for indicating the dynamic nature of his model, "*(there is) the possibility to move from one type to another*" (italics added by the author).

Figure 3.3 Luscher's Model of Intergenerational Ambivalence



Source: Luscher (2000: 19, 2004: 51, 2005: 103)

On the subject of empirical research, Luscher (2005) maintained that both quantitative and qualitative methods are feasible for measuring intergenerational ambivalence, although the latter seem more reasonable in general. In practice, there are three kinds of ways to measure intergenerational ambivalence. The first is to measure both positive and negative feelings about the relationship separately (Pillemer and Suito, 2002). The second way is to measure both emotions together by asking to what extent family members' feelings are mixed with opposing emotions (Willson, Shuey, and Elder, 2003; Fingerman, Hay, and Birditt, 2004). The last way is to measure members' behaviours whether they have experienced 'push and pull' situations (Van Gaalen and Dykstra, 2006: 949). Whilst the first and second approaches show family members' psychological states, the last one informs the specific contents of the relationship.

However, there are a few empirical studies that explored the intergenerational

ambivalence. For example, Pillemer and Suitor (2002) and Pillemer (2004) found that older parents' ambivalence about adult children is widely prevalent. In addition, Fingerman and Hay (2004) found that ambivalence between older people and adult children is different from that of other social relations and that the experience of ambivalence changes through the life course.

Although the concept of intergenerational ambivalence is well conceptualized by some empirical findings, it should be noted that the theory of intergenerational ambivalence has been criticized in both ways. In other words, theoretically, the intergenerational ambivalence perspective has been criticized because the ambivalence model is too static and abstract even though Luscher developed it by adding spiral line to show the dynamic characteristics in 2005 (Katz et al., 2005). Empirically, it is criticized because there is no clear causal model explaining why a certain relationship is more ambivalent than another (Steinbach, 2008).

3.6. Theory of the Happiness

3.6.1. The Philosophical Concept of Happiness

Historically, the concept of happiness was firstly discussed by the philosophers such as the Stoics, the Aristotelians, and the Epicureans (Bok, 2010; Mack, 2010). The Stoics regard happiness as the perfect condition of good whereby everyone who is happy is not lacking anything. For them, pleasure is one of the dimensions of happiness, but pleasure is an extremely irrational condition. According to the Aristotelians, happiness is a kind of process of fulfilling or flourishing for a meaningful life as well as a goal of life itself (Layard, 2005). They regard pleasure as the necessary element of happiness. Meanwhile,

the Epicureans consider happiness as a kind of pleasure. The Epicureans believe that those who want to be happy should be virtuous because virtuousness is an indispensable tool for leading a happy life. According to Epicureans, happiness can be adapted by one's circumstance. For instance, if a man has roast chicken without a Coke, he will adapt his desire so that he will want only roast chicken. By doing this, his desire can be met and he will be happy.

Table 3.1 summarizes philosophers' thoughts both on the form and content of happiness. Regarding its form, every philosopher considers happiness as the highest good, the ultimate end, and a state of being and not just a feeling (Vlastos, 1991; Meyer, 2008). They also insist that advocating happiness is the fundamental aim of philosophical ethics and satisfying a certain set of conditions is the requirement for men to feel happy (Annas, 1993). Meanwhile, the philosophers' perspective on the content of happiness is based on the five questions, namely whether a single virtue is indispensable and enough for happiness or not; whether all virtues are indispensable and enough for happiness or not; whether longevity is indispensable and enough for happiness or not; whether pleasure is a condition of happiness; and whether external goods are indispensable and enough for happiness (Miller, 2010). The Stoics think that the single virtue is not enough but that all virtues are indispensable for happiness. They regard longevity, pleasure, and external goods as neither necessary nor enough for happiness. The Aristotelians consider that single and all virtues, longevity, pleasure, and external goods are all indispensable but not enough for happiness. Finally, the Epicureans think that single and all virtues are instrumentally necessary but not enough for happiness. They consider longevity and external goods necessary but not enough while pleasure is necessary and enough for happiness (Potkay, 2010).

Table 3.1 Philosophers' Perspective on the Form and Content of Happiness

Form of the Happiness (A)						
	Highest Good	Ultimate End	Goal of Ethics	Feeling	State of Being	Necessary and Sufficient
The Stoics	O	O	O	×	O	O
Aristotelians	O	O	O	×	O	O
Epicureans	O	O	O	×	O	O
Content of the Happiness (B)						
	Single Virtue	All Virtues	Longevity	Pleasure	External Goods	
The Stoics	Indispensable but not enough	Indispensable and enough	Neither indispensable nor enough			
Aristotelians	Indispensable but not enough					
Epicureans	Instrumentally indispensable but not enough		Indispensable but not enough	Indispensable and enough	Indispensable but not enough	

Note: O (Yes), × (No).

Source for (A): Miller (2010: 609)

Source for (B): Miller (2010: 618); Potkay (2010: 525)

3.6.2. Happiness from the Social Scientists' Perspectives

While the philosophical concept of happiness is quite abstract, that of social scientists is relatively more concrete (McMahon, 2010; Feldman, 2010). More specifically, demographers discuss happiness by linking it mainly with age, but there is still no consensus on this (Andrew and McKennel, 1980; Graham, 2011). For example, on one hand, the relationship between happiness and age is positive, namely happiness improves with ageing (Witt et al., 1980). Many scholars (Carstensen, 1991, 1995; Lawton, 1996; Lockenhoff and Carstensen, 2004) believe that this might be so because the elderly are more skilfully able to manage their negative emotions than the young. On the other hand, Mroczek and Kolarz (1998: 1345) found that “age and negative effect were not related” by analysing 2,727 participants in midlife in the United States Survey. Recently, Gerdtham and Johannesson (2001) reported a U-shaped relationship between happiness

and age, with the least happiest age group being 45-64 years. It is widely accepted that the U-shaped relation between happiness and age is the result of the relatively faster increase in desired consumption in age than the financial resources available for its realization (Frijters and Beatton, 2008; Fischer, 2009).

Traditionally, psychologists have focused more on mental states rather than happiness itself (Parker, 2007). This trend has changed, mainly since the 1990s, as observed by the so-called 'Positive Psychologists' (Thin, 2012). They argue that happiness can be achieved by mitigating the negative emotions and that individuals' happiness is adapted according to a changing environment over a long period (Graham, Chattopadhyay, and Picon, 2010; Kringelbach and Berridge, 2010; Layard, 2005). This is well known as 'the set point theory of happiness', which was initially suggested to explain the relationship between one's personality and happiness (Headey and Wearing, 1992; Stutzer and Frey, 2010). According to the set point theory, every person has his or her own set point of happiness, fixed by genes and personality (Johns and Ormerod, 2007; Larsen, 2000). For instance, Lykken and Tellegen (1996) analyzed 1,155 twins (2,310 people) in the Minnesota Twin Study and reported that inherent nature from parents is a general determinant of happiness over a lifetime. Therefore, if there are any positive or negative life events such as marriage, promotion, divorce, bereavement, unemployment, or an onset of disease and so on that place the person above or below the set point of happiness, the adaptation mechanism will be run, thereby assuming the initial level of happiness (Kahneman and Krueger, 2006; Lyubomirsky, Sheldon, and Schkade, 2005).

Recently, a similar perspective with the set point theory, namely 'the hedonic treadmill model of happiness' has been suggested. The main point of this model is that either positive or negative life events influence one's happiness for a certain period of time but individuals take the original condition incrementally (Mencarini and Sironi,

2012; Diener, Lucas, and Scollon, 2006; Carver and Scheier, 1990). For example, Brickman, Coates, and Janoff-Bullman (1978) reported that the level of happiness of lottery winners increased if the prize was between 50,000 dollars and 1,000,000 dollars, but declined as time passed. Similarly, Suh, Diener, and Fujita (1996) reported that positive or negative events influence happiness only when they had occurred in the past two months.

However, many studies report that the basic set point can be permanently changed so that it cannot function properly any more. For example, Sheldon and Lyubomirsky (2004) found that the baseline of happiness increased for those who performed a kind deed at least one day a week. Similarly, repeated unemployment (Lucas et al., 2004), being widowed (Lucas et al., 2003), and successful cosmetic surgery (Wengle, 1986) can change the fundamental level of the initial set point. Moreover, Headey (2006) reported that the set point theory was not persuasive, at least in the German context. He analyzed 2,843 Germans aged 16 and over and selected from the German Socio-Economic Panel data and found that happiness was not only unstable, but that it declined over time. This reflects that the returning mechanism towards the baseline degree of happiness did not work, and thereby that the set point theory is not valid for Germans.

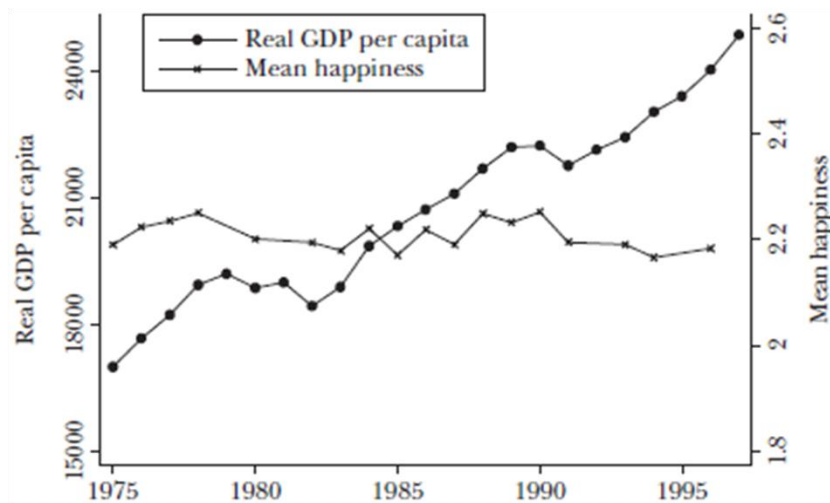
Meanwhile, the debate on happiness in the economics is focused on the impact of income on degree of happiness (Kahneman and Krueger, 2006; Alesina, Di Tella, and MacCullock, 2004). On one hand, the degree of happiness is associated positively with the amount of income in the short term in any countries (Ferrer-i-Carbonell, 2005; Ferrer-i-Carbonell and Frijters, 2004; Senik, 2004; Frey and Stutzer, 2002). However, the increase in the extent of happiness becomes smaller as income rises (Hagerty and Veenhoven, 2003; Stutzer and Frey, 2010). For example, the amount of increase in

happiness in those whose income level is between 10,000 and 20,000 dollars is around 0.09 but the level for those whose level is between 20,000 and 30,000 dollars is about 0.05 (Di Tella and MacCulloch, 2006). The trend is consistent both in the advanced economies (Shields and Price, 2005; Blanchflower and Oswald, 2004) and developing countries (Lelkes, 2006; Graham and Pettinato, 2002). However, the size of change is bigger in the developing countries than in developed nations (Clark, Frijters, and Shields, 2007).

On the other hand, the income effect on happiness levelled off over a long term period (Burchardt, 2005). According to Graham (2009), and Johns and Ormerod (2007), the seminal work on this relationship was first conducted by Richard Easterlin, the founder of modern economic research on happiness. The ‘Easterlin Paradox’ indicates that “over time, happiness does not increase when a country’s income increases” (Easterlin et al., 2011: 1). For example, as figure 3.4 illustrates, Easterlin (1974) first reported that the level of income had not determined the degree of happiness in the USA between 1975 and 1997. Then he (1995) showed that the same paradox is witnessed both in the European countries, including Britain, Ireland, France, Italy, Germany, Denmark, Netherlands, Belgium, and Greece, and in Japan. Moreover, Easterlin (2005) supported the paradox by showing the thirty years (from 1972 to 2002) levelled off trend of the relationship between income and happiness. Alanen and colleagues (2010) also reported that happiness in Finland had not increased in spite of the increased wealth there since 1980s. The paradox is also supported in China. Gallup interviewed 15,000 Chinese and found that the happiness of Chinese people had not increased even though their real income per capita rose between 1994 and 2005 (Kahneman and Krueger, 2006). Jeffrey Sachs expressed these results as ‘the paradox of affluence’ by taking the examples of Bhutan and Costa Rica (RGB, 2012). It is widely accepted that this paradox occurs

because people usually consider their level of wealth not based on their absolute quantity of money but relative to that of others (Boettke and Coyne, 2012), so that their aspirations increase in terms of seeking an ever-higher income (Easterlin, 2001; Layard, 2005).

Figure 3.4 The Relationship between the Real GDP per capita and Mean of Happiness in the United States of America between 1975 and 1997



Note: Happiness was measured by asking: “Taken all together, how would you say things are these days? 1) not happy, 2) pretty happy, 3) very happy

Source: Di Tella and MacCulloch (2006: 27)

Finally, the discussion of happiness by sociologists has focused mainly on two points, namely the relationship between happiness and capitalism, and the importance of social support through one’s social network, such as family members, friends, and neighbours, and so on.

The seminal works on the relationship between happiness and capitalism are written by Karl Marx, Max Weber, and Daniel Bell. For example, Karl Marx (1947 [1929]) argued that one’s relative economic situation is the critical factor affecting happiness. In other words, he explained that if an individual’s small and simple house is surrounded by other houses that are of similar size and simplicity the person will not be

unhappy; but if bigger and more luxurious houses are established beside the small house, the person will be less happy than before. In relation to Max Weber's argument, it should be noted that constraining the pursuit of happiness played a significant role of the birth of modern capitalism by way of Protestantism. Max Weber (1976 [1904]) showed that modern capitalism was born in Western societies based on the spirit of the Protestant, namely 'the calling' that avoided temporal hedonism but pursued making a fortune. Moreover, Daniel Bell (1996) insisted that the change from production to consumption in capitalism brought about the constant searching for hedonism.

Furthermore, sociologists who lay an emphasis on the importance of social support on happiness are fundamentally based on the legacy of Durkheim. In other words, Durkheim's seminal works (1984 [1893], 2002 [1897]), which showed that suicide is more likely to occur when a person is loosely connected with other people or social norms than when the individual is strongly linked to or supported by other people or organizations, suggest the importance of a social bond on happiness. Recently, this group of sociologists criticized the Easterlin Paradox in the sense that economic perspective cannot capture the subjective dimensions of happiness (Graham, 2009). These scholars are based on 'the relative preference theory', maintaining that the value or utility of one's financial resources is relative to others (Duesenberry, 1949). They emphasize that the social support derived from one's inter-personal relationships, such as family, friends, and neighbours, are important as well, rather than measuring only the amount of financial resources (Argyle, 1987; Alanen et al., 2010; Hamermesh and Abrevaya, 2011). For example, those who have more close friends and spend interesting times with them are happier than those who have fewer close friends or spend less interesting times with them (Henderson, Byrne, and Duncan-Jones, 1981; Graham, 2011). Similarly, those who have more social networks are happier than those who have fewer social networks (Argyle,

1987). In addition, Lane (2000) reported that the extent of happiness of those who are above the poverty line are significantly more affected by social relationships such as friends and family members than by income level.

Consequently, these diverse Western perspectives on happiness provide some profound implications for the present thesis, which aims to explore the happiness of people in later life in South Korea. In other words, even though the philosophical perspective on happiness is too abstract for this empirical thesis, the social scientists' perspectives are all instructive. The demographers' discussion suggests that socio-demographic status should be considered. The psychologists' perspective implies that the condition of health is also to be included and this is strongly supported in that about 40.7 per cent of older people in South Korea stated that health problems were the most important issue for them in 2007 (KNSO, 2007). Similarly, the economists' legacy suggests that socio-economic status, including old-age income security provided by family and public pension systems, should be considered. In this regard, there is no doubt in that around 30.9 per cent and 44.6 per cent of older people responded that a lack of money was the most difficult problem for them in 1998 and 2005, respectively (KNSO, 1999, 2005). Finally, the sociologists' discussion, on the importance of social support on the happiness, in particular, suggests that family support should be considered. In fact, around 70 per cent of older people in South Korea still need assistance from their adult children, which means that most of the older people cannot live their lives without intergenerational support (KNSO, 2010b).

3.7. Conclusion

In this chapter, we have established the theoretical backbone by critically reviewing the

core literature on the thesis topic. In other words, we examined the concept of generation and adopted the concept of family generation to be applied in a genealogical rather than historical approach. The applicability of the theory of intergenerational solidarity to the South Korean context can be established through connecting the six dimensions of intergenerational solidarities with the Confucist approach to expressions of filial piety in South Korea.

Even though the intergenerational solidarity perspective provides a powerful lens with which one can account for family relationships, the model has been criticized because it just focuses on the positive dimension of family relationships with a normative emphasis. This shortcoming fails to capture the core benefit of the theory of intergenerational conflict – namely the intergenerational conflict caused by an imbalance of power and authority between generations. However, both the intergenerational solidarity and conflict theories fail to explain the more complicated dimension of intergenerational relationships due to the fact that their classification of family relationships as a dichotomy of solidarity and conflict. Although the intergenerational ambivalence perspective overcomes the dichotomy, it itself is still too abstract.

Meanwhile, historically, philosophers such as the Stoics, Aristotelians, and the Epicureans were the first to discuss the concept of happiness. Whilst their discussion is very much abstract, that of social scientists such as demographers, psychologists, economists, and sociologists is relatively more concrete. Although those social scientists' discussion on happiness is still rather fluid, their legacy suggests several important elements that should be considered when happiness is empirically analysed.

In the next chapter, we will examine the public pension systems including both the National Pension Scheme and Basic Old-Age Pension for later life in South Korea.

Chapter 4

Public Pension Systems for Later Life in Contemporary South Korea

4.1. Introduction

Generally speaking, pension systems can be either public or private and they are hugely important for old-age income security (Bloom, Jimenez, and Rosenberg, 2012; Behrendt, 2007). In particular, public pension systems are distinguished from private pension programmes in several ways. Historically, a public pension system is one of the dimensions of the social security system, and the main purpose is to prevent poverty in later life after retirement through supporting income maintenance since the seminal work of the Beveridge Report published in 1942 in the United Kingdom (Alcock, 1999; Sainsbury, 1999). Furthermore, the public pension system is managed under government responsibility (Timonen, 2008). There are two specific types in general, namely contributory and non-contributory public pensions. As the former is based on the principle of social insurance, participation is compulsory and the specific rules of payment are defined by legislation (Marschallek, 2011). The latter can be either a universal or means-tested programme, for which eligibility is dependent on certain limited conditions.

This chapter aims especially to examine the public pension systems for later life in South Korea in detail. The chapter focuses on two public pension systems for later life, namely the National Pension Scheme and the Basic Old-Age Pension. The National Pension Scheme is explained based on its core contents, such as motivation of implementation, participants, contribution, benefit, and reformation, followed by policy evaluation, i.e. the success and failure of the National Pension Scheme. The Basic Old-Age Pension is also explained according to its key elements such as policy process, eligibility, beneficiary, funding mechanism, cost, delivery system, benefit, and policy

evaluation, i.e. tracing success and failure of the Basic Old-Age Pension. Finally, the chapter concludes with the presentation of the summary.

4.2. The National Pension Scheme

According to the Korea National Statistical Office (KNSO, 1999, 2012b), in South Korea, around 30.9 per cent and 40.2 per cent of older people, respectively, responded that experiencing a financial shortage was the most difficult problem for them in 1998 and 2011, respectively. Similarly, the Ministry of Strategy and Finance (MSF, 2011) reported that the poverty rate of South Korean older people aged 65 and over is 45.1 per cent, which is almost three times higher than the average of OECD members (17.1 per cent) in 2011. Notwithstanding, only about 27.6 per cent of older people aged 60 and over responded that they had prepared for their future income security, whereas around 63.8 per cent of middle-aged people aged in their 40s and 50s had prepared for their later years, according to the 2005 South Korean National Survey (MGEF, 2005).

Meanwhile, the proportion of older people who responded that investing money in the National Pension Scheme was necessary for their income security in later life had been increasing: 59.7 per cent in 2009, 65.2 per cent in 2010, and 71.9 per cent in 2011 (MOHW, 2012f). This reflects that the National Pension Scheme is an important source for guaranteeing income security in later life in South Korea. More specifically, this is very important for people in later life because the real retirement age and statutory retirement age are not same thereby they are more vulnerable to income insecurity if they did not plan in advance (MHWFA, 2009).

4.2.1. The Political Economy of Implementing the National Pension Scheme

The National Pension Welfare Act was formally instituted in 1973, when the military government of South Korea led by Park Cheong-hee was on power. Why was the act passed at a time of military government? According to the most dominant Western perspective for explaining the critical background to implementing the pension scheme, it was possible because of resource mobilization by the advanced economy and the government's policy response to population ageing (Wilensky, 1975; Rimlinger, 1971). However, this perspective is not persuasive in the South Korean context. The average Gross Domestic Product (GDP) was only around 200 US dollars during 1970s and older people aged 65 and over occupied just 3.3 per cent of the whole population (Kim and Seok, 1999).

Therefore, in the South Korean context, it is more plausible to explain that the National Pension Scheme was introduced mainly owing to the other two factors, namely political and economical. Politically, the Park Cheong-hee government needed to justify the 7th Reform of the Constitution, the so-called Yushin Constitution, which provided him with lifelong presidency. In other words, the government advertised the National Pension Scheme as its blueprint for achieving a welfare society for all South Koreans. Economically, the National Pension Scheme was a good option as a way of raising funds to invest in industrialization. The government supported the National Pension Welfare Act because it wanted to raise additional funds for investing in heavy chemical industry development (Kim and Kim, 2006). At that time, the military government could not extend the amount of foreign capital since the amortization deadline was due. Therefore, seemingly, there was no choice but to find alternative sources of funding within the country (Chon, 1987). As a result, the military government executed the act in 1972,

based on the Korea Development Institute's report stating that the National Pension Scheme could raise around 100 billion won (Park, Choi, and Hwang, 2007).

Although the National Pension Scheme Law was prepared in 1973 and was supposed to be formally introduced in January 1974 (Hwang, 2009), it was delayed owing mainly to political and economic problems. Politically, the military government was afraid of losing its initiative vis-à-vis a competing political platform in North Korea. North Korea abolished income tax in 1974 and advertised it to South Koreans, suggesting that the South Korean government might have introduced the National Pension Scheme as a new tax on South Koreans (Yang, 2009). Economically, the first oil shock in 1973 caused a tremendous economic recession in South Korea (Park and Ko, 2010; An, 2005). However, the economic conditions at that time including a 28 per cent increase in exports, 13 per cent of economic growth, and a surplus on the balance of payments (around 4.6 billion US dollars at that time from the National Plan for Economic and Social Development) together with arising problems related to population ageing and a collapsing traditional family support system – pushed the South Korean government into formally introducing the National Pension Scheme in January 1988 (Jung, 1994; NPS, 2012a).

4.2.2. The Participants and Beneficiaries of the National Pension Scheme

Generally, the National Pension Scheme covers both South Koreans and foreigners living in South Korea aged 18 to 59, excluding those participating in other pension programmes for civil servants, and soldiers, and private school teachers and staff (MHWFA, 2009). From 2013, the normal entitlement age will be increased to 65, and the early retirement age to 60 (OECD, 2011b). Participants in the National Pension Scheme are classified into

mainly two groups, namely the naturally registered group and the voluntarily registered group (NPS, 2012b). The former includes labourers working in a company and the individually insured, i.e. residents living both in rural and urban areas. The latter includes voluntarily insured people, and both continuously and voluntarily insured people (LISNARK, 2012a). Those who are working in a company or are self-employed, and individually insured must register; those in voluntary group can either register or not, as they prefer.

As figure 4.1 and table 4.1 illustrate, the total number of participants and beneficiaries of the National Pension Scheme has been continuously increasing since its implementation. This generally implies that the role of the National Pension Scheme for old-age income security has become more influential as time flows. In particular, it should be noted that there was a steep increase in participation between 1998 and 1999. This is mainly because of the progressive nature of the social welfare policy of the Kim Dae-jung government, which expanded the social security net to tackle the side-effects caused by the economic crisis in late 1998. The National Pension Scheme was extended on 1 April 1999 to self-employed people living in urban areas, employees working for a company employing fewer than five people, and part-time workers in urban areas.

Table 4.1 The Total Number of Beneficiaries of the National Pension Scheme and its Rate Compared with All Older People Aged 60 and Over

	1988	1992	1995	1998	1999	2005	2010
Total Number of Beneficiaries of the National Pension Scheme (1,000)	3	493	878	1,269	1,255	1,767	2,992
Total Number of Older People Aged 60 and Over in the Country (1,000)	3,071	3,949	4,519	5,191	5,422	6,924	8,527
Rate of Recipients (%)	0.1	12.5	19.4	24.4	23.1	25.5	35.1

Source: UN (2011c); NPS (2010: 9, 2009: 9, 2006: 9)

4.2.3. Contribution to the National Pension Scheme

The total rate of contributions to the National Pension Scheme has increased since its implementation. For example, it was 3 per cent from 1988 to 1992, 6 per cent from 1993 to 1997, and 9 per cent since 1998 (MOHW, 2011c). The total amount of the National Pension Scheme contribution is calculated by taking the average of monthly salary based on the total yearly income multiplies the contribution rate. Every insurer must pay the contribution from one month after the month in which participants are granted acceptance into the National Pension Scheme. If a participant fails to pay the full contribution on the due date, an additional 3 per cent of the total amount of contribution is charged, on top of an additional 1 per cent of unpaid contribution (MOHW, 2011c).

In general, those who work for a company are covered equally by their employer and their own contributions even though the exact allocation of the contribution rate was somewhat different by year. The 3 per cent of the total contribution rate was divided equally between employers and employees, each respectively between 1988 and 1992. Similarly, between 1993 and 1997, the 6 per cent of the total contribution rate was equally divided by 2 per cent to employers and employees, respectively. The remaining 2 per cent was aided from the fund changed to the National Pension Scheme. Since 1998, the 9 per cent of the total contribution rate was equally divided by 4.5 per cent to employers and employees (OECD, 2011b; An, 2005).

If an individual works for a company which only employs fewer than ten workers in total, the contribution is subsidized by the government at around between one third and a half of total amount of contribution of both the employer and worker (MOHW, 2012e). However, others, including the self-employed, the individually insured, the voluntarily insured, and the continuously and voluntarily insured must themselves

contribute as much as 9 per cent of their average of monthly salary, based on the total yearly income. Those who work for two or more companies must register each pension scheme at all their workplaces (NPS, 2012b). If an employer ceases to operate their business or employees lose their jobs, they are exempted from the contribution obligation (LISNARK, 2012a). The exempted period is not counted as the duration of contribution but the membership is still valid (MOHW, 2011c).

It should be noted that economically deprived groups are entitled to receive financial support from the government based on the social justice principle. In other words, the government provides both farmers and fishermen with subsidization for their contribution – at most, 50 per cent of the total amount of contribution from 1 July 1995 (Chae, 2012; NPS, 2012a). For example, in 2010, farmers and fishermen who earn over 790,000 won a month are subsidized to the value of 35,550 won a month, whereas those who earn less than 790,000 won are received a subsidy half their total amount of contribution (GORK, 2010). However, this support programme for farmers and fishermen is to end on 31 December 2014, because of budget limitation (LISNARK, 2012a).

Figure 4.1 (below) illustrates the total amount of contribution to the National Pension Scheme since its implementation. It shows that in general the total amount of contribution for the National Pension Scheme had been steadily increasing. The most noticeable point here is that the total amount rocketed between 1998 and 1999. This is because of the tremendous increase in the total number of participants in the National Pension Scheme during that period, which resulted from the massive expansion of social security programmes by the government to respond to the economic crisis.

Another interesting point is that the total amount of contribution decreased from 1999 until 2002. This is mainly because many participants in the National Pension Scheme did not pay their contribution during that period. In other words, as table 4.2

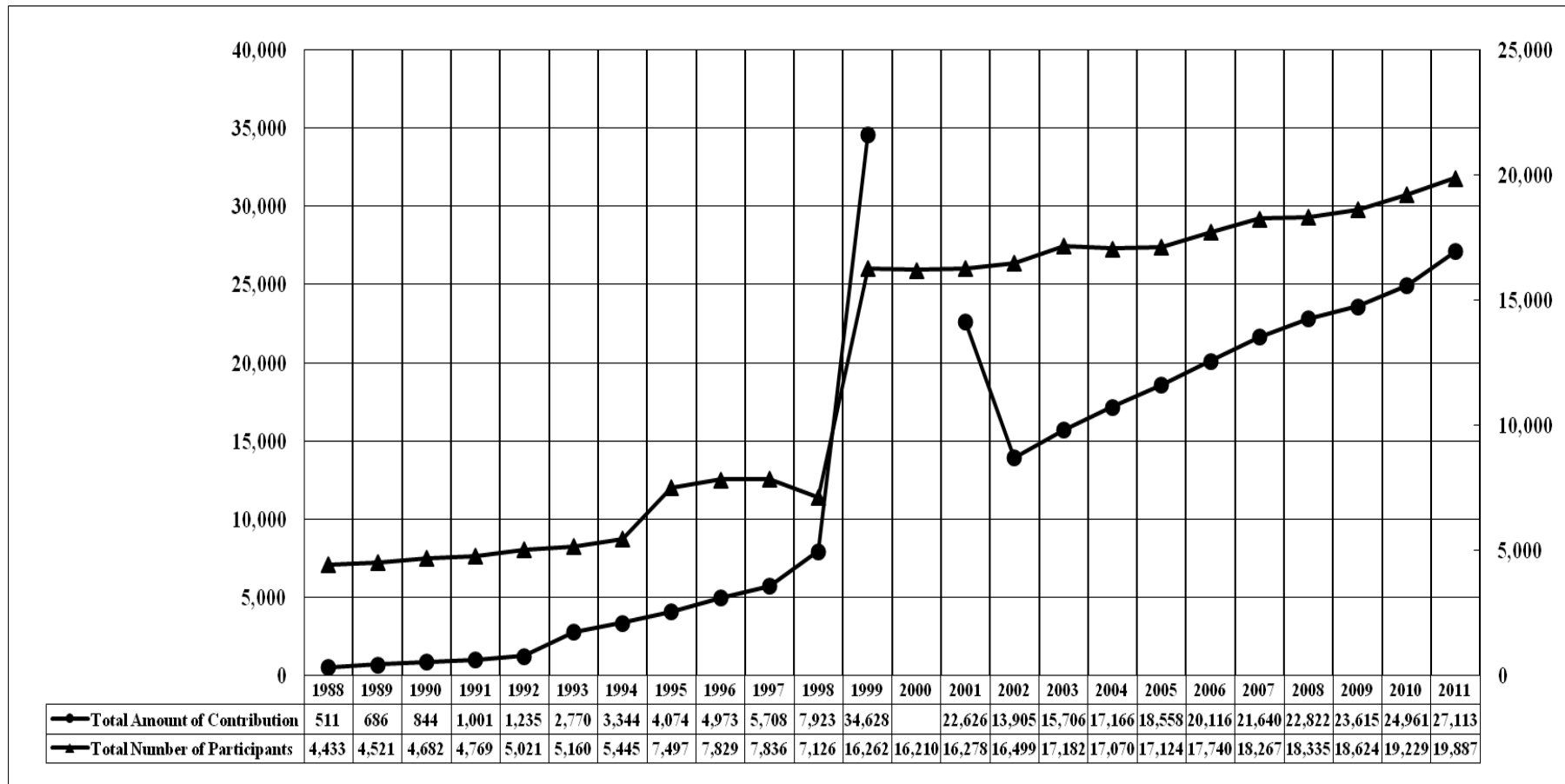
summarizes, the collection rate of the contribution is very low, with the average being just around 59 per cent in 2002. This might be the result of a huge increase in National Pension Scheme participants between 1998 and 1999, by and large not wealthy enough to pay their contribution as self-employed people, workers in a company employing fewer than five persons, and part-time workers.

Table 4.2 The Collection Rate of Contributions to the National Pension Scheme

2001	March	May	August	November	Average
Collection Rate (%)	87.3	79	79.3	79.4	81.25
2002	-	May	September	November	Average
Collection Rate (%)	-	60	59.3	58.2	59.17

Source: NPS (2001a: appendix, 2001b: 105, 2001c: 93, 2001d: 106, 2002a: 99, 2002b: 98, 2002c: 90).

Figure 4.1 The Total Number of Participants and Amount of Contributions to the National Pension Scheme



Note for Participants: A unit is 1,000 people (The figures were finally collected in December each year).

Note for Contributions: A unit is Billion won (Figure for 2000 is missing).

Source for Participants: NPS (2012a:5, 2010: 3, 2009: 3, 2006: 3)

Source for Contributions: NPS (2011: 8, 2010: 8, 2009: 8, 1998: 24)

4.2.4. Benefit of the National Pension Scheme

The main policy goal of implementing the National Pension Scheme was to support the income security of South Koreans when they become old or ill by depositing money while they can work (LISNARK, 2012a; MHWFA, 2009). To achieve this goal, the South Korean government designed the benefit structure of the National Pension Scheme as a ‘defined benefit’ mode that determines the extent of benefit. This is because the income security function of the defined benefit mode is more efficient than that of defined contribution (Gillion et al., 2000). In order to receive the benefit of the National Pension Scheme, an individual should contribute for at least ten years and be aged 60 and over.

Table 4.3 accounts for the formula of the National Pension Scheme benefit. The total amount of benefit of the National Pension Scheme generally comprises both the Basic Pension Amount and the Additional Pension Amount or Dependants’ Allowance. The former applies to only those who contributed for over 20 years and it is calculated on the basis of the existing level of contribution (MOHW, 2012b). The latter is a kind of family allowance that can be provided only when a spouse, children who are aged under 18 or have a second rank disability, and parents aged 60 or over were supported by a participant at the time of achieving a pension right (MOHW, 2011c). The amount of dependant allowance for a spouse, children, and parents was 227,270 won, 151,490 won, and 151,490 won, respectively in 2011 (NPS, 2012b). The most distinctive aspect of this formula is the decreasing trend of total coverage. In other words, the total amount of the National Pension Scheme benefit has been reduced by cutting the income replacement rate. For example, it decreased from 70 per cent for P1 to 50 per cent to P3 and it is scheduled to come down to 40 per cent for P4. This decreasing trend is a kind of result of policy intervention by the South Korean government in the process of responding to the

population's ageing.

Table 4.3 The Formula for the National Pension Scheme Benefit

$$[\{2.4(A+0.75B)\times P1/P\}+\{1.8(A+B)\times P2/P\}+\{1.5(A+B)\times P3/P\}+\{1.2(A+B)\times P4/P\}]\times(1+0.05N/12)$$

- A: Average amount of monthly income for three years before receiving the National Pension Scheme benefit.
- B: Average amount of monthly income of the insurer.
- N: Total number of contributed months after contributing for 20 years.
- P: Total number of contributed months.
- P1: Total number of contributed months by December 1998 (income replacement rate is 70 %).
- P2: Total number of contributed months by December 2007 (income replacement rate is 60 %).
- P3: Total number of contributed months from 2008 (income replacement rate is 50 %).
- P4: Total number of contributed months from 2028 (income replacement rate is 40 %).

Source: Yoon (2011: 3)

Table 4.4, which follows below summarizes specific kinds and conditions, and the total amount of the National Pension Scheme benefit. The kind of benefit is broadly classified into two groups according to the way of payment, namely a regular allowance and lump-sum payment. The former is made up of three kinds of benefits: old-age pension, disability pension, and survivor pension. The latter consists of two kinds of benefits: lump-sum refund and lump-sum death payment. The old-age pension which is paid out as a regular allowance has five different dimensions, i.e. full, reduced, active, early, and special old-age pension.

The full old-age pension is provided to those who are aged 60 and have contributed for at least 20 years. The total amount is the sum of the full basic pension amount and the dependants' allowance. For those who contributed for less than 20 years, a reduced amount of benefit is provided by multiplying the reduced rate based on the duration of contribution with Basic Pension Amount. The active old-age pension is for

those who are aged 60 years but less than 65 years old and who receive real income by labouring. The total amount of the active old-age pension is determined according to the insurer's age and duration of contribution. If an individual is 55 years old and over and the person contributed for more than or equal to ten years without engaging in income-earning work, the early old-age pension is provided according to their age and duration of contribution. The special old-age pension is for those who could not join the National Pension Scheme because of the age criterion. The total amount they receive is the flat rate of the basic pension with dependants' allowance. When the insurer is disabled by disease or accident during the insured period, the disability pension is paid, and the total amount depends on the degree of the disability. The survivor pension is provided to the dead pensioner's family members including spouse, (grand-) parents (-in-law), and (grand-) children and the total amount is the sum of the basic pension and an additional amount according to the duration of contribution. If the insurer died without family members who are eligible to receive survivor pension, the lump-sum death payment is provided to the insurer's relatives. The lump-sum refund is available not only for those aged 60 but contributed less than ten years or joined other public pension programmes, but also anyone who lost South Korean citizenship.

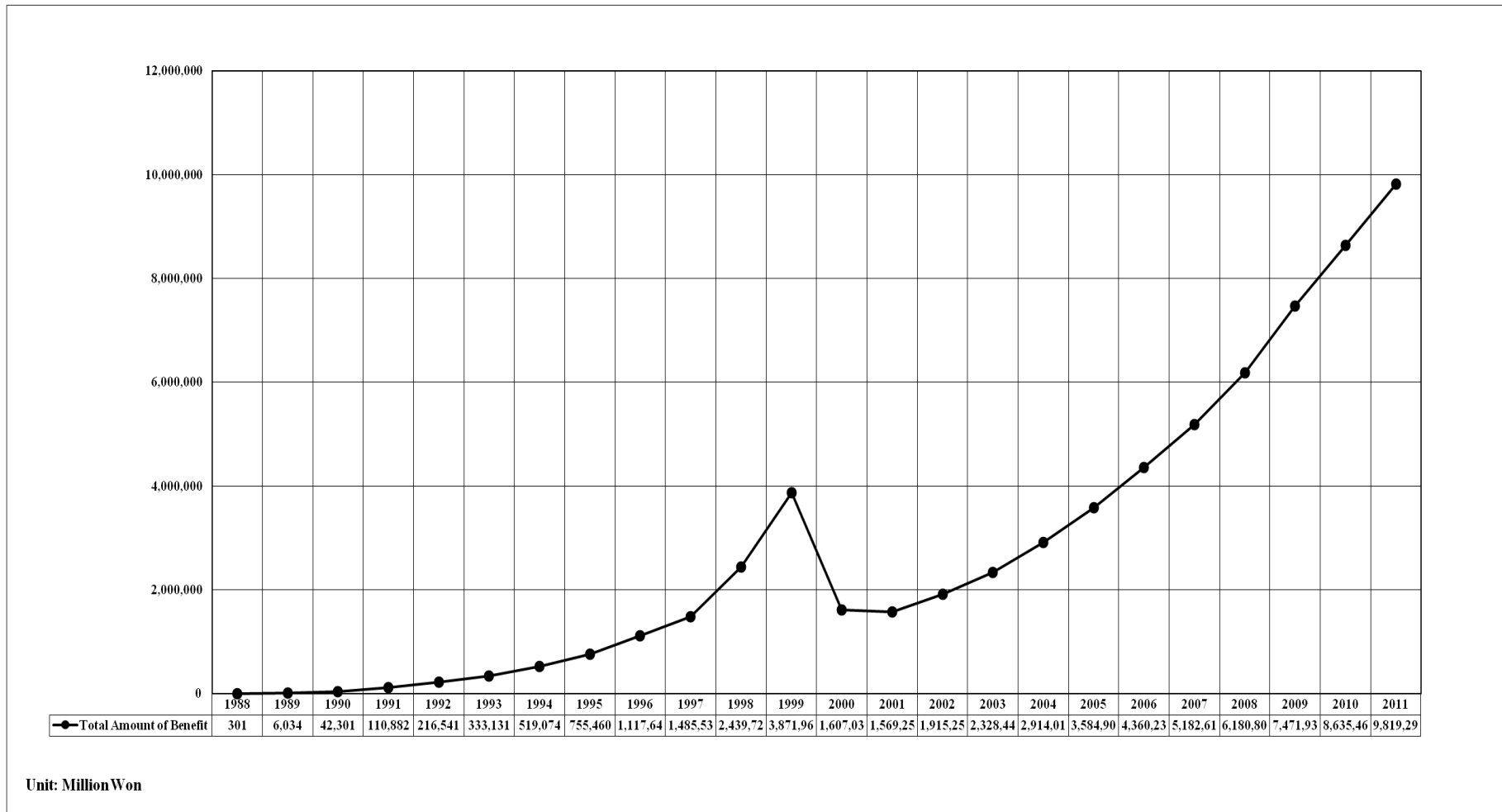
Figure 4.2 illustrates the total amount of benefit of the National Pension Scheme by year. Both increased steadily since 1988, but the slope rose steeply between 1998 and 1999. This is because of the economic crisis that brought South Korea financial aid from the International Monetary Fund. In other words, many pensioners closed their pension account during that period to preserve their income security. This is attributable to the increasing trend of total amount of benefit.

Table 4.4 Kinds, Conditions, and Total Amount of the National Pension Scheme Benefit

Kinds of Benefit		Conditions for Receiving the Benefit	Total Amount of Benefit	
Regular Benefit	Old-Age Pension	Full	<ul style="list-style-type: none"> Those who reached 60 years and contributed for more than or equal to 20 years. Those who are under 65 should not be earning any income. 	<ul style="list-style-type: none"> Basic Pension Amount (100 %) + Dependants' Allowance.
		Reduced	<ul style="list-style-type: none"> Those who reached 60 years and contributed more than or equal to 10 years and less than 20 years. Those who are less than 65 years should not be earning any income. 	<ul style="list-style-type: none"> 10 years' contribution: Basic Pension Amount (50 %) + Dependents Allowance. Additional 5 % of Basic Pension Amount will be added for every one year increase of contribution.
		Active	<ul style="list-style-type: none"> Those who are working with real income and are 60 years but less than 65 years old. 	<ul style="list-style-type: none"> 10 years' contribution and 60 years old: 50 % of the Basic Pension Amount × 50 %. Additional 5 % of Basic Pension Amount will be added for every one year of increased of contribution. Additional 10 % rate of distribution for every year's increase (e.g. 60 years old: 50 %, 61 years old: 60 % etc). No dependants' allowance available.
		Early	<ul style="list-style-type: none"> Those who are 55 years old and over and contributed for more than or equal to 10 years but are not engaged in income-earning Work. They must request the payment of the benefit before they are 60 years old. 	<ul style="list-style-type: none"> 10 years' contribution and 55 years old: 50 % of the Basic Pension Amount × 70 % + dependants' allowance. Additional 5 % of Basic Pension Amount will be added for every one year of increased contribution. Additional rate of distribution according to age: 1) from 55 years old: 700/1,000; 2) from 56 years old: 760/1,000; 3) from 57 years old: 820/1,000; 4) from 58 years old: 880/1,000; 5) from 59 years old: 940/1,000.
		Special	<ul style="list-style-type: none"> This scheme is for those who were too old when the National Pension Scheme was implemented, so that they could not meet the age criterion. Therefore the duration of contribution is not applied to this scheme. 	<ul style="list-style-type: none"> Fixed rate of Basic Pension Amount with dependants' allowance.
	Disability Pension	<ul style="list-style-type: none"> Onset of disability by disease or accident during the insured period or if the disability continues after recovery. 	<ul style="list-style-type: none"> Total amount of benefit is a sum of the basic pension amount and additional amount according to the degree of disability: <ol style="list-style-type: none"> Disability rank 1: basic pension amount (100 %) + dependent allowance. Disability rank 2: basic pension amount (80 %) + dependent allowance. Disability rank 3: basic pension amount (60 %) + dependent allowance. Disability rank 4: basic pension amount (225 %). 	
	Survivor Pension	<ul style="list-style-type: none"> When the insured is dead, the benefit is given to survivors, including spouse, (grand-) parents (-in-law), and (grand-) children. 	<ul style="list-style-type: none"> Total amount of benefit is a sum of the basic pension amount and an additional amount according to the duration of insurance: <ol style="list-style-type: none"> Less than 10 years: basic pension amount (40 %) + dependants' allowance. More than or equal to 10 years and less than 20 years: basic pension amount (50 %) + dependants' allowance. More than 20 years: basic pension amount (60 %) + dependants' allowance. 	
Lump-sum Benefit	Lump-sum Refund	<ul style="list-style-type: none"> If a participant who contributed less than 10 years turns 60 years or registered with another public pension scheme. If a participant lost national citizenship. 	<ul style="list-style-type: none"> Total amount of contribution with appropriate interest. 	
	Lump-sum Death Payment	<ul style="list-style-type: none"> When the insured dies but leaves no immediate family members who are qualified to receive the survivor pension, the benefit is given to other relatives. 		

Source: GORK (2010: 138); LISNARK (2012a: 11-21); MOHW (2011c); NPS (2012b)

Figure 4.2 Total Amount of Benefit of the National Pension Scheme



Source: NPS (2011: 152, 2010: 9, 2009: 9, 2006: 9)

4.2.5. Reforming the National Pension Scheme

4.2.5.1. Background to the Reform of the National Pension Scheme

While the real reason behind implementing the National Pension Scheme was economic development that was politically staged as a justification for the military coup, the reform of the National Pension Scheme was geared towards responding to the problems raised by an ageing population (Kim, 2012; Yang, 2009). Owing to the fact that the National Pension Scheme applies a partial funding system, there is no doubt that the revenue will be in deficit when the benefit is distributed in earnest as the demographics shift towards older people. In other words, like many other public pension systems in the Western welfare states facing financial austerity as a result of the population's ageing (Hausermann, 2010; Palier, 2005), from the beginning, the National Pension Scheme had been criticized for its mainly inherent structure of financial instability, namely a higher level of benefit compared with a lower level of contribution and accelerated by population ageing (Guerard et al., 2012; Kang and Lee, 2010; Choi, 2006). This problematic situation was very serious because the rate of older people aged 65 and over rocketed from 3.1 per cent in 1970 to 7.1 per cent in 2000 (Chung, 2005, 2007).

Furthermore, there was a problem of intergenerational fairness in the National Pension Scheme as Howse (2007) argued below.

“...future generations would have a legitimate grievance against earlier generations that benefited through the pension system at their expense – and this is what will happen in unreformed PAYGO (*Pay As You Go*) schemes as a result of population ageing.” (Howse, 2007: 54, italics added by the author)

Accordingly, the South Korean government had been reforming the National Pension Scheme since its implementation. The reform can be broadly categorized into minor and major reforms.

4.2.5.2. Minor Reform of the National Pension Scheme

Since the start of the National Pension Scheme during the Chun Doo-hwan administration (from September 1980 to February 1988), several distinctive minor reforms had been carried out by both the Roh Tae-woo administration (from February 1988 to February 1993) and Kim Young-sam administration (from February 1993 to February 1998).

First, the National Pension Scheme was extended to people working in a company employing five or more people in 1992 (Jo, 2010; Ku, 2003; Kim and Seok, 1999). This reform was possible because of the impact of the democratization movement during the Roh Tae-woo administration, namely, most governmental policies during that period were relatively more democratized than during previous administrations and the National Pension Scheme was also affected by the impact. In fact, even though the Roh Tae-woo administration succeeded the previous military dictatorship of the Chun Doo-hwan administration, Roh's government was considered more democratic than the previous military government. This was based on several democratic-oriented policies, such as 'The 6•29 Declaration of Democratization'.

Second, the National Pension Scheme was extended to rural areas for farmers, fishermen, and self-employed people living in rural provinces rather than urban areas in July 1995. This coverage extension of the National Pension Scheme was the mixed result both of the policy ideas of the Kim Young-sam government and the socio-structural condition of that time.

For example, the coverage extension was under the policy target of the Kim Young-sam government. Social welfare policy at this time was affected mainly by the United Nations World Summit for Social Development 1995 and the fundamental social welfare model of this time, which was ‘productive welfare’. Therefore, the government played a role as a regulator rather than provider of welfare (Jo, 2010). The Kim Young-sam administration declared its aims to be ‘globalizing the quality of life’ and the Committee of Welfare Planning was established as a result. The committee produced the ‘Basic Welfare Plan for Globalizing the Quality of Life Report’, which indicated the coverage extension of the National Pension Scheme.

The socio-structural condition was two-fold. One is the fact that the problem of population ageing in rural area was more serious than in urban areas (Ku, 2003). For example, the ageing rate of older people aged 60 and over increased dramatically from 10.5 per cent in 1980 to 21.7 per cent in 1992 in rural provinces (Yang, 2009). The other is that the traditional family support system for older parents was collapsing more severely in rural area than urban areas owing to industrialization and modernization (Cho and Jang, 2007).

4.2.5.3. Major Reform of the National Pension Scheme

4.2.5.3.1. The First Major Reform of the National Pension Scheme

Initially, the first major reform of the National Pension Scheme was begun in June 1997 by the Committee for Improving the National Pension Scheme (under the Kim Young-sam government), and the final reform plan was completed in December 1997. The fundamental structure of the first major reform was very similar, with an option based on

market-oriented reform suggested by the World Bank (Kim, 2002). However, due to the economic crisis in late 1997, the final plan of the first major reform prepared by the Kim Young-sam administration could not be carried out but was revised by the following government.

The Kim Dae-jung government (from February 1998 to February 2003) had to confront a huge scale of economic recession because it came into power during the national economic crisis. For example, the unemployment rate increased from 2.6 per cent in 1997 to 8.7 per cent in 1999 and the real salary dropped by 10.7 per cent by the end of 1998; as a result, many families were pushed into poverty (Ramesh, 2008). In fact, the poverty rate increased steeply from 3 per cent in the final quarter of 1997 to 7.5 per cent in the third quarter of 1998 (Jo, 2010; Knowles, Pernia, and Racelis, 1999).

The fundamental direction of social policy of the Kim Dae-jung government for responding to the economic turmoil was to expand the social security net considerably. The uniqueness of the Kim Dae-jung government for meeting the policy goal can be found in their January 1998 establishment of the Economic and Social Development Commission comprised of the representatives of the triple stakeholders – employers, employees, and government officers. This organization played a critical role in ensuring harmonized policy decisions were made by triple stakeholders and enabled the Kim Dae-jung government to push forward smoothly the policy for reforming the social security net.

Nonetheless the government could not completely apply the policy idea to the National Pension Scheme; namely, the first major reform was carried out both to increase and decrease the level of coverage. On one hand, the National Pension Scheme was applied throughout the country in April 1999 (Ahn and Lee, 2005). Specifically, the National Pension Scheme was extended not only to self-employed people living in urban

areas but also to every type of labourer including part-time workers but excluding firms which employed fewer than 5 people in April 1999 (Joo, 2008).¹¹ Moreover, the contribution rate was equally divided between employers and employees at 4.5 per cent for each in 1998. Furthermore, the reform aimed to increase the contribution rate of individuals living in rural areas incrementally rather than radically, i.e. starting from 4 per cent from July 2000 but increasing 1 per cent every year, thus 9 per cent after July 2005. On the other hand, the income replacement rate decreased from 70 per cent to 60 per cent (Kang and Lee, 2010; Seok J-E, 2010). In addition, the reform aimed to increase the pensionable age to 65 years in 2033 (Kim and Seok, 1999).

4.2.5.3.2. The Second Major Reform of the National Pension Scheme

It is argued that the serious imbalance between the amount of contribution and benefit will continue to worsen because of population ageing; the existing National Pension Scheme will therefore not be sustainable without another major reform in 2003 (MOHW, 2011c; Choi and Bae, 2005). Given the existing contribution rate of 9 per cent, the total fund of the National Pension Scheme will be the largest at 2,465,000 billion won in 2043 before going into deficit from 2044 (GORK, 2010). This projection pushed the Roh Moo-hyun government (from February 2003 to February 2008) to undertake the second major reform of the National Pension Scheme. This reform was steered by the Committee for Developing National Pension Scheme within the Ministry of Health and Welfare in March 2003.

Unlike the first major reform of the National Pension Scheme was carried out smoothly thanks both to the influential role of the Economic and Social Development

¹¹ It was supposed to start in 1998 but was delayed by a year because it was passed late in the National Assembly (Yang, 2009).

Commission and the social consensus for sharing pains caused by the economic crisis, the second major reform was very controversial. For example, it provoked a social movement for abolishing the National Pension Scheme as well as an opposition social movement for protecting the National Pension Scheme, a political contestation comprised of 11 associations of older people in the Gwacheon Government Complex (Nam, 2010). In fact, it took around four years to complete the second major reform of the National Pension Scheme and the controversial debates exchanged mainly based on the different policy proposals. The following table 4.5 summarizes the key policy proposals for the second major reform of the National Pension Scheme and they can be classified into three types.

First, the Ministry of Health and Welfare insisted that the income replacement rate should be decreased to 50 per cent for those who contributed for 40 years. It also suggested that the contribution rate should be increased up to 15.9 per cent by 2030. Secondly, the ruling party (Uri Party) argued the same option of government for income replacement rate but suggested maintaining 9 per cent of the contribution rate. Finally, the opposition party (Grand National Party) suggested a different application for the revised scheme. Regarding the income replacement rate, the party proposed 20 per cent of average monthly income for the basic pension and the same rate for the earning-related pension only for those who had contributed for 40 years. The opposition party argued that the contribution for the basic pension should be exempted, i.e. it should be funded by the general tax but it suggested a contribution of 7 per cent for an earnings-related pension.

Table 4.5 Core Contents of Proposals for the Second Major Reform of the National Pension Scheme

	Ministry of Health and Welfare	Ruling Party (Uri Party)	Opposition Party (Grand National Party)
Income Replacement Rate	<ul style="list-style-type: none"> • Those who contributed for 40 years: 55 % from 2004 to 2007; 50 % after 2008. 	<ul style="list-style-type: none"> • Those who contributed for 40 years: 55 % from 2004 to 2007; 50 % after 2008. 	<ul style="list-style-type: none"> • Basic pension: 20 % of average of monthly income. • Earning-related pension: 20 % for those who contributed for 40 years.
Contribution Rate	<ul style="list-style-type: none"> • Increasing 1.38 % each 5-year after 2010. • Increasing up to 15.9 % by 2030. 	<ul style="list-style-type: none"> • Maintaining 9 %. 	<ul style="list-style-type: none"> • Basic pension: general tax. • Earning-related pension: 7 %.

Source: An (2005: 98)

The second major reform of the National Pension Scheme was completed in 2007, with four-fold core changes. First, the income replacement rate of those who contributed for 40 years decreased. In other words, it aimed to decrease it to 50 per cent by 2008, to raise it to 40 per cent until 2028 by incrementally decreasing 0.5 per cent every year after 2008 (OECD, 2011b; Seok J-E, 2010; Joo, 2008; Chung, 2007). Second, previously, anyone aged under 65 and engaged in income-earning work could not receive the pension benefit, but the second major reform enabled them to receive the active old-age pension from the age of 60 (Chung, 2007). Third it also abolished the stipulation prohibiting pensioners from receiving more than two pension benefits; therefore, they can be provided a full pension benefit from one pension with a partial benefit from other pension.

Finally, the second major reform tried to achieve gender equality by introducing the pension credit system for the men who finished military service and the women who gave birth (Joo, 2008; Chung, 2007). As a result, since June 2011, the National Pension Scheme has provided a kind of fringe benefit applied differently by gender. In other

words, if a man who finished his military service is entitled to the benefit, he will receive an additional benefit which is equivalent to the amount for 6 months; only those who started the military service after 1 January 2008 can benefit (NPS, 2012b). When it comes to a woman pensioner, she had to give birth to at least two children if she wants to take advantage of the provision – this benefit has been available also since 1 January 2008 (LISNARK, 2012a; NPS, 2012b). For example, women who have two children will receive an additional benefit that is equivalent to the amount for 12 months and those who have more than three children will receive more: 18 months per a child together with 12 months. However, the advantage for women cannot exceed 50 months (LISNARK, 2012a).

The historical development of the National Pension Scheme outlined above can be summarized in table 4.6.

Table 4.6 The Historical Development of the National Pension Scheme

Stage	Regime Period	Core Contents	President
Preparatory Period	October 1963 - October 1979	<ul style="list-style-type: none"> • Promulgating the National Pension Welfare Act (24 December 1973). • Delaying the National Pension Welfare Act due to the First Oil Shock (January 1974). 	Park Cheong-hee
	September 1980 - February 1988	<ul style="list-style-type: none"> • Promulgating the National Pension Act: abolition of the National Pension Welfare Act (31 December 1986). • Starting the National Pension Scheme for only companies employing 10 or more employees (1 January 1988). 	Chun Doo-hwan
Minor Reform	February 1988 - February 1993	<ul style="list-style-type: none"> • Extending the National Pension Scheme: extension to companies employing 5 or more employees (1 January 1992). 	Roh Tae-woo
	February 1993 - February 1998	<ul style="list-style-type: none"> • Extending the National Pension Scheme: extension to farmers, fishermen, and self-employed people living in rural provinces (1 July 1995). 	Kim Young-sam
The First	February	<ul style="list-style-type: none"> • If a spouse aged 60 and over divorced a 	Kim

Major Reform (since June 1997)	1998 - February 2003	pensioner and they had been legally married for five years while contributing to the National Pension Scheme, the benefit should be equally divided between both of them (1 January 1999). <ul style="list-style-type: none"> • Extending the National Pension Scheme: extension to self-employed people living in an urban area, employees working for a company employing fewer than 5 people, and part-time workers in urban areas (1 April 1999). 	Dae-jung
The Second Major Reform (March 2003-2007)	February 2003 - February 2008	<ul style="list-style-type: none"> • Extending the National Pension Scheme: extension to specialized companies employing one or more employees (1 July 2003). • Extending the National Pension Scheme: extension to all companies employing one or more employees (1 January 2006). 	Roh Moo-hyun

Source: Presidential Archives (2012); NPS (2012b, 2006); MOHW (2011c); MHWFA (2009: 413); Seok J-E (2010: 194); Yang (2009: 105); An (2005: 104)

4.2.6. The Success and Failure of the National Pension Scheme

In deciding whether the National Pension Scheme was a successful policy or a policy failure, conceptually, as McConnell (2010) argued, it is somewhere between these two possible outcomes. However, it is feasible to gauge both extreme results for understanding the important policy outcomes of the National Pension Scheme. In reality, like most welfare systems that fail to meet their initial policy goals, the National Pension Scheme has both bright and dark sides.

On the one hand, the bright side of the National Pension Scheme is that by and large it satisfied the initial policy goal of increasing social solidarity through an income distribution. As a kind of social insurance system, the strategy of mitigating inequality of the scheme through the income distribution is not unusual (Evans et al., 2008). The effect achieved takes place in two ways (NPS, 2012b).

The first route is an income distribution within generations. In other words, those

who earn a lower level of income than the average income of the total number of insured people receive relatively more benefit than those who earn a higher level of income than the average income of all insured. This is because the fundamental benefit structure of the National Pension Scheme is based on a progressive formula. That is, income replacement is higher for lower income group but lower for higher income group (MOHW, 2011c; MHWFA, 2009).

The second aspect is income distribution via intra-generation. This indicates that the amount of benefit for those who participated at an earlier stage of the National Pension Scheme is relatively larger than that of those who joined later. This is because the amount of contribution of earlier participants is less than that of later participants. This model is intended to decrease the burden of the earlier participants because they had to support their old parents as well as themselves.

On the other hand, the dark side of the National Pension Scheme is that the programme is not yet completely established. This can be explained in two ways. First, even though the National Pension Scheme aims to cover all South Koreans, there are still many citizens who do not join the programme. For example, around 17.2 per cent of workers who get paid and 30.1 per cent of labourers who do not get paid do not participate in the programme (Yoon, 2011).

The second is a failure to cover several groups of people located in the so-called 'dead zone of the National Pension Scheme'. There are three important groups who are not covered by the National Pension Scheme. The first consists of those who benefit from the National Basic Living Security but cannot be covered by their company. They have to contribute themselves if they want to participate in the National Pension Scheme. The second, as table 4.7 shows below, is those who are working in a specialized labour market and are not covered by the National Pension Scheme. Even though they are working for

the company, they register and contribute themselves due to the ‘Income Tax Law’.

Finally, there are many older people who could not join the National Pension Scheme because they could not meet the age criterion when the programme was introduced. As a result, they are excluded from the National Pension Scheme, and this is the starting point for creating a new income security policy for older people, namely the Basic Old-Age Pension.

Table 4.7 Types and the Number of People Working in the Specialized Labour Market

Insurance Sales People	Concrete Mixer Truck Drivers	Tutors for Home-school Materials	Caddies on Golf Links	Total
310,000	20,000	120,000	30,000	480,000

Note: Figures apply to October 2008.
Source: GORK (2010: 140)

4.3. The Basic Old-Age Pension

Unlike the National Pension Scheme, which was initially implemented for creating a financial resource for investing into the economic development and subsequently reformed in order to respond to population ageing, the Basic Old-Age Pension was originally implemented in response to population ageing. When the South Korean government prepared the Basic Old-Age Pension, it surveyed older people’s attitudes to the need for such a scheme. For instance, the national policy report conducted by the Ministry for Health, Welfare and Family Affairs, and the Korea Institute for Health and Social Affairs (MHWFA and KIHSA, 2009) reported that about 97 per cent of older people had responded that the Basic Old-Age Pension was necessary for their active and happy life. The main purpose of the programme is to strengthen the income security of older people who are mainly not covered by the National Pension Scheme (Yoon, 2011;

Ko, 2007; Chung et al., 2007). For example, overall about 21 per cent of older people are not covered by the public income security system (GORK, 2008), in particular those who were already old before the implementation of the National Pension Scheme were not covered by the National Pension Scheme (Kim and Seok, 1999).

4.3.1. Policy Process of Implementing the Basic Old-Age Pension

Table 4.8 summarizes the key points of the policy process of establishing the Basic Old-Age Pension. Specifically, the South Korean government formally announced the introduction of the Basic Old-Age Pension for addressing the problem of the dead zone of the National Pension Scheme in June 2006. Two months later, the government carried out a national survey to examine the income and asset condition of older people in order to use it as the baseline for creating the Basic Old-Age Pension. In September 2006, the Basic Old-Age Pension Act was formally proposed both by the government and the ruling party. From late 2006, opposition parties began to submit their alternatives to the pension scheme proposals (MOHW, 2011c).

Meanwhile, there were several proposals for the Basic Old-Age Pension suggested by the government, ruling party, and opposition parties. The main points of the debates for introducing the Basic Old-Age Pension were the purpose of the programme, degree of coverage, governing body, means of funding, amount of benefit, and future cost. The debate was very controversial and the vast majority of experts forecast that the stakeholders would be unable to reach a consensus. In reality, however, the opposition parties dramatically agreed with the proposal suggested by the government on 5 December 2006. The Basic Old-Age Pension Act was duly passed in April 2007 by the Judiciary Committee, followed by the Plenary Session of the National Assembly, with

254 assents, 8 dissents, and 2 abstentions (MOHW, 2010b; MHWFA, 2009). The Basic Old-Age Pension was formally set up in January 2008 (Joo, 2008). Many scholars argued that this was possible thanks to the power of gerontocracy, suggesting that the opposition parties felt substantial pressure from their elderly constituents to pass the legislation – especially as a presidential election was scheduled for 2007 (Nam, 2010).

Table 4.8 Policy Process of Making the Basic Old-Age Pension

Timeline of Making the Basic Old-Age Pension (A)				
June 2006	• Formal announcement of introducing the Basic Old-Age Pension.			
August 2006	• Conducting a national fact finding survey of income and assets for making the Basic Old-Age Pension.			
September 2006	• Formal proposal of the Basic Old-Age Pension Act.			
October 2006	• Group discussion among the experts' committee members for making the Basic Old-Age Pension Act.			
December 2006	• Passing the Basic Old-Age Pension Act in the National Assembly Standing Committee.			
March 2007	• Passing the Basic Old-Age Pension Act in the National Assembly Legislation and Judiciary Committee.			
April 2007	• Passing the Basic Old-Age Pension Act at the plenary session in the National Assembly.			
January 2008	• Formally starting the Basic Old-Age Pension.			
Proposals for Making the Basic Old-Age Pension (B)				
Controversial Point	Ministry of Health and Welfare	Ruling Party (Uri Party)	Opposition Party (Democratic Labour Party)	Opposition Party (Grand National Party)
Name of the Legislation	'Legislation of the Basic Old-Age Pension'		'Legislation of the Basic Pension'	'Legislation for Amending the National Pension Scheme'
Purpose of the Programme	Basic Old-Age Pension		Basic Pension	
Coverage (in 2007)	• 45 per cent of all older people aged 65 and over (around 2.17 million)	• 60 per cent of all older people aged 65 and over (around 2.893 million)	• 80 per cent of all older people aged 65 and over who have resided for 10 years or more in South Korea (around 3.857 million)	• All the elderly aged 65 and over (around 4.822 million)
Governing Body	Minister of the Ministry of Health and Welfare or governor of the		Government (possible to	National Pension Service

		local government (possible to contract out of the National Pension Service)	contract out of the National Pension Service)		
Funding Responsibility		General Tax + Revenue from Local Governments		General Tax	
Amount Of Benefit (in 2007)		• 80,000 won a month	• 70,000-100,000 won a month	• 83,000 won a month in 2008, then an increase to 240,000 won a month in 2028	• 140,000 won a month in 2008, then an increase to 300,000 won a month in 2028
Projection of Future Cost	2007	2,100 BW	2,700 BW	4,600 BW	12,700 BW
	2010	2,300 BW	3,100 BW	6,600 BW	18,600 BW
	2020	4,100 BW	5,800 BW	30,500 BW	65,900 BW
	2030	7,300 BW	10,700 BW	103,400 BW	191,800 BW

Note: BW (Billion won).

Source for (A): Chung and colleagues (2007: 171); MOHW (2010a: 2)

Source for (B): Chung (2008: 7-8); Chung and colleagues (2007: 171); Nam (2010: 322)

4.3.2. Eligibility for the Basic Old-Age Pension

Generally, the Basic Old-Age Pension is available only to those aged 65 and over. If they want to receive Basic Old-Age Pension benefit, they have to submit the application for it as they are not considered automatically even if they meet the age criterion (Chung, 2008). If older people cannot apply for themselves for any reason, their family members, including siblings, children, and relatives, can submit the application instead (MOHW, 2012d). This is because the Basic Old-Age Pension is governed under Section 11 of the Social Security Act, which mandates that social security benefits must be distributed through self-submitted applications. After submission, qualification is determined through means test, which evaluates the applicant's financial condition, namely the total amount of income and assets (OECD, 2011b). The relevant organization should complete the means test within 30 days of receiving the application, but it can be delayed for up to 60 days if there is any unexpected incident (MOHW, 2011b).

For the purpose of the means test, income includes money earned from work,

self-employed business, payment by lending assets, and diverse pension benefit but excludes both temporary income from by part-time working and private financial transfer from family members (MOHW, 2012d). If an applicant changes jobs, then the new income is considered (MOHW, 2011b). The following types of benefits are not included for consideration in the means test: disability allowance, financial compensation for suffering from pneumoconiosis, financial aid for a farmer who grows rice, and resettlement funds for North Korean defectors are excluded from the means test (MOHW, 2011b).

Assets include houses, land, stocks, financial insurances, and so on (MOHW, 2011c). When calculating the amount of assets, debt must be deducted (Chung, 2008). If an applicant rents a house 95 per cent of the total amount of the rent is considered as an asset (MOHW, 2011b). If an applicant has given assets to their children legally, the financial value is added to the means test for three years from the date of the bequest (MOHW, 2011b). This rule also applies when an applicant donates financial resources to philanthropic organizations. This is to prevent applicants from achieving entitlement by spontaneously giving their assets legally to their children or any organizations (Ko, 2007).

The means test is applied to spouses and not just to an applicant, if one of them is alive regardless of co-residing and age (MOHW, 2012d; Chung et al., 2007). Furthermore, even if a spouse is missing or in prison, all financial resources are considered for the means test as long as they are legally spouses (MOHW, 2011b). If a spouse has a foreign citizenship and not a South Korean citizenship, total income is automatically considered for the means test but it only applies to assets that are held within South Korea (MOHW, 2011b).

Table 4.9 summarizes the maximum amount of income and assets for applicants seeking to pass the means test. The condition applies differently to older people who live

alone and to those with a spouse. Those who have less than the total threshold can be eligible to receive the Basic Old-Age Pension benefit. The most noticeable point is that the maximum total threshold of monthly income and assets has continuously increased in both groups of people since the implementation of the Basic Old-Age Pension. This implies that the conditions for passing the means test are becoming progressively and easier as time passes.¹² This is closely connected with the increase of the number of beneficiaries.

Table 4.9 Maximum Amount of Finance for Passing the Means Test for the Basic Old-Age Pension

		2008	2009	2010	2011	2012
Older People (Alone)	Monthly Income (less than)	40	68	70	74	78
	Total Amount of Asset (less than)	9,600	16,320	27,600	-	-
Older People (with Spouse)	Monthly Income (less than)	64	108.8	112	118.4	124.8
	Total Amount of Asset (less than)	15,360	26,112	37,680	-	-

Unit: 10,000 won

Source: MOHW (2012a, 2012d, 2010a: 3, 2010b: 19); MHWFA and KIHSA (2009: 303)

4.3.3. Beneficiaries of the Basic Old-Age Pension

The South Korean Government planned three stages of extending the number of beneficiaries of the Basic Old-Age Pension (MOHW, 2012b, 2010b; Nam, 2010; Ko, 2007). During the first stage, from January 2008 to June 2008, it aimed to cover around 60 per cent of the elderly aged 70 and over. During the second stage, from July 2008 to December 2008, the government aimed to extend the scheme to about 60 per cent of the elderly aged 65 and over. For the third stage, from January 2009, it plans to include approximately 70 per cent of the elderly aged 65 and over.

¹² If the applicants' situation changed after qualifying for the pension, such as changes in income, asset, marital status, and so on, they must report these within 30 days otherwise the qualification would be abolished (Chung, 2008).

This extension naturally results in increasing the number of beneficiaries. For example, table 4.10 summarizes the specific number of beneficiaries of the Basic Old-Age Pension and its rate compared with all of the elderly aged 65 and over in South Korea. It shows by and large the continuous increase since the scheme was implemented. It should be noted that there is a gender difference. In other words, there are far more female beneficiaries than male recipients each year. This might be because there are more female elderly in total thanks to their relatively higher life expectancy than male elderly (MOHW, 2010b). Another possibility for this marked gender difference is the fact that there are many more impoverished female elderly people than male elderly, i.e. the so-called ‘feminization of poverty’ in South Korea (Song, 2008; Kim and Park, 2007).

Table 4.10 The Total Number of Recipients of the Basic Old-Age Pension and its Rate Compared with All Older People Aged 65 and Over by Gender

		2008	2009	2010	2011
Female Older People	Total Number of Recipients of the Basic Old-Age Pension	1,974,837	2,371,466	2,425,850	-
	Total Number of Older People Aged 65 and Over in the Country	2,983,846	3,079,924	3,166,857	3,260,929
	Rate of Recipients (%) ¹³	66.18	77	76.6	-
Male Older People	Total Number of Recipients of the Basic Old-Age Pension	909,511	1,258,681	1,302,090	-
	Total Number of Older People Aged 65 and Over in the Country	2,032,180	2,112,786	2,189,996	2,276,143
	Rate of Recipients (%)	44.76	59.57	59.46	-
Total	Total Number of Recipients of the Basic Old-Age Pension	2,884,348	3,630,147	3,727,940	3,876,000
	Total Number of Older People Aged 65 and Over in the Country	5,016,026	5,192,710	5,356,853	5,537,072
	Rate of Recipients (%)	57.5	69.91	69.59	70

Note: This data is based on the statistics in December each year. Some government documents report a slightly different result based on the statistics in April each year. Some results are provided by Ms Moon Hee Kim who works for the Ministry of Health and Welfare by personal communication.

¹³ This is calculated based on the formula [Rate of Recipients (%) = Total Number of Recipients of the Basic Old-Age Pension / Total Number of Older People in the Country × 100].

Source: GORK (2010: 158-159); MOHW (2011a: 362, 2010a: 2, 2010b: 15, 2008); KNSO (2011: appendix 1-2)

4.3.4. The Cost and Funding Structure of the Basic Old-Age Pension

Table 4.11 summarizes the cost and funding structure of the Basic Old-Age Pension. The total cost during the first year was around 2,209.4 billion won and has continuously increased since then. When it comes to the amount of funding, the Basic Old-Age Pension is the biggest social welfare policy among single social welfare policies in South Korea (Nam, 2010). Because older generations contributed their lives to achieving economic development during industrialization and raised families without preparing for their own later life, the Basic Old-Age Pension is funded solely by general taxes. Every local government manages the funding system (MOHW, 2012d; LISNARK, 2012b; Joo, 2008; Kim, 2007).¹⁴ The central government must provide more than or equal to 40 per cent and less than or equal to 90 per cent of the total cost of the Basic Old-Age Pension, according to the rate of the elderly as well as financial condition of every local government, where the local government must be responsible for the remaining cost (LISNARK, 2012b).

Table 4.11 Total Amount of Cost for the Basic Old-Age Pension and the Rate of Division of the Cost by the Central Government

Total Amount of Cost of the Basic Old-Age Pension by Year (Billion won)				
	2008	2009	2010	2011
From Central Government	1,590.8	2,465.9	2,720.2	2,822.3
From Local Government	618.6	944.7	990.8	968.1
Total	2,209.4	3,410.6	3,711	3,790.4
Rate of Financial Support from the Central Government in 2011				

¹⁴ This was consistent with another fundamental reason for setting up pension systems in the Western welfare states. They believed that the older generation deserved to receive financial support through the pension systems because they had contributed their lives to ensure the economic affluence for next generations (Bode, 2005; Snell, 1996).

		Rate of Older People (%)		
		Less than 14	14-less than 20	20 and over
Fiscal Self-Reliance Rate of Local Government (%) ¹⁵	More than or equal to 90	40	50	60
	80-less than 90	50	60	70
	Less than 80	70	80	90

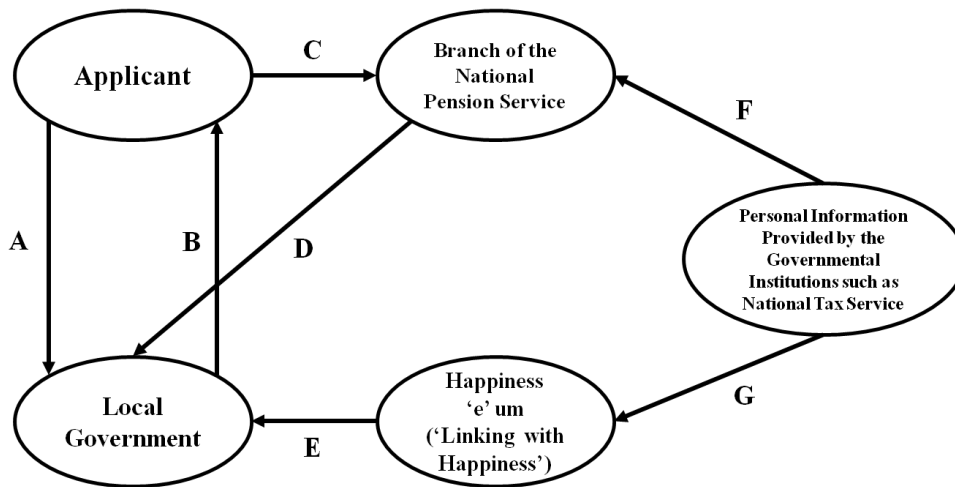
Source: MOHW (2011c: 421, 2010a: 3, 2010b: 11)

4.3.5. The Delivery System of the Basic Old-Age Pension

Figure 4.3 illustrates the delivery system of the Basic Old-Age Pension since the Amendment Act of the Basic Old-Age Pension in July 2007 (MHWFA, 2009; Chung, 2008). The central information system, namely the ‘Happiness ‘e’ um’ (meaning that linking with happiness) has begun to be used for managing the delivery system of the Basic Old-Age Pension more effectively since January 2010. The elderly can apply for the Basic Old-Age Pension either through local government or one of the branches of the National Pension Service (A and C). If an older person submits the application to the relevant branch of the National Pension Service, the centre for the Basic Old-Age Pension within the branch sends it to the local government (D). Both the ‘e’ um sector and the branch of the National Pension Service provide complete information about the applicant, such as income, assets, national registration, and so on (D and E) that were supplied by relevant governmental institutions such as the National Tax Service (F and G). Subsequently, every local government makes a decision regarding the applicant’s suitability and provides the benefit to the recipient (B).

¹⁵ Fiscal self-reliance ratio of local government (%) = [total income of the local government / total revenue of the local government) × 100] (MOHW, 2010b: 22).

Figure 4.3 The Delivery System of the Basic Old-Age Pension



Source: MOHW (2011a: 423, 2010b: 24); Nam (2010: 315); MHWFA (2009: 450).

4.3.6. Benefit of the Basic Old-Age Pension

The total amount of the Basic Old-Age Pension benefit is fixed at 5 per cent of average monthly income during the immediate three years prior to the date on which an individual starts to receive benefits from the National Pension Scheme (MOHW, 2012b; Yoon, 2011).¹⁶ Since the 5 per cent is fixed, the total amount of the Basic Old-Age Pension benefit is essentially determined by factors affecting the average income of National Pension Scheme participants (Kang and Lee, 2010). As table 4.12 shows, the amount of the Basic Old-Age Pension benefit has increased continuously since its implementation but it differs according to whether only an older person or spouses benefit. In other words, if both husband and wife pass the means test and achieve the Basic Old-Age Pension benefit entitlement (Ko, 2007), the total amount will be decreased by reducing each benefit by 20 per cent (Chung, 2008).

¹⁶ It is planned to increase the rate incrementally to 10 per cent by 2028 (MOHW, 2011c).

Table 4.12 Total Amount of Benefit of the Basic Old-Age Pension

	2008	2009	2010	2011	2012
One Older Person Living Alone	84,000	88,000	90,000	91,200	94,600
Spouses Living Together	134,000	140,000	144,000	145,900	151,400

Unit: won

Source: MOHW (2012a, 2012b: 1, 2011b: 58-59, 2010a: 2); Yoon (2011: 2)

The recipients can be paid the Basic Old-Age Pension benefit from the month of their birth date if they applied one month before of their 65th birthday. The benefit is provided until the month of expiry of the entitlement (LISNARK, 2012b). If they pass the means test any day after the month of the date when they submitted the application, the benefit will be provided from the month of submission (MOHW, 2011b). If the beneficiaries changed their address before 15th of the month, the benefit is provided by the previous local government, but after 15th of the month it is supplied by the new local government (Chung, 2008).

The benefit is automatically deposited into the account of the beneficiary, but if the recipient has health problems such as dementia or physical disability, the benefit can be paid to the recipient's family members (MOHW, 2011b). Before 2012, if the beneficiary died, only his or her spouse, direct descendents and their spouses, grandchildren and their spouses by order can request the remaining benefit (MOHW, 2011b). However, his or her direct ancestors and their spouses have been able to receive the remaining benefit since 2012 (MOHW, 2012c).

If a beneficiary qualifies for another pension right, such as Civil Servants' Pension, Military Personnel Pension, or Private School Teachers Pension, the recipient should choose only one of them. However, if the total amount of pension benefit does not exceed a certain amount decided by the relevant law, the recipient can receive a benefit from more than two schemes within that amount (LISNARK, 2012b).

4.3.7. The Success and Failure of the Basic Old-Age Pension

Unlike evaluating the National Pension Scheme, it is premature to at this time evaluate fully the success and failure of the Basic Old-Age Pension, because of its short history. In other words, only five years have passed since its implementation. Furthermore, there are only a few empirical studies that evaluated the effect (MHWFA and KIHSA, 2009). Therefore only limited discussion about its success and failure is possible, with some preliminary results.

On the one hand, it has emerged that the Basic Old-Age Pension has contributed to decreasing to some extent the poverty of the elderly (MHWFA and KIHSA, 2009). For example, Seok H-S (2010) analysed the effect of the Basic Old-Age Pension on the extent of poverty of the elderly. He used two indicators, namely the poverty rate which focused on the quantitative dimension of the poverty and the poverty gap rate which focused on the qualitative dimension of poverty to evaluate the effect of the Basic Old-Age Pension.

As table 4.13 shows, in general, the Basic Old-Age Pension yields positive effects, both on poverty rate decline and poverty gap rate decline in ordinary and disposable income, regardless of household type, because the effect of improvement is positive in all sections. More specifically, when we compare the extent of each score, the noticeable point is that the size of improvement both for male and female elderly people living alone is much larger than for any other section, and far bigger than the total effect, with the sole exception of the size of improvement in the disposable income of male elderly living alone. Moreover, the total extent of the effect of poverty gap rate decline is larger than that of poverty rate decline. This implies that the Basic Old-Age Pension is not enough for the poor elderly to escape from the poverty itself, but is effective for decreasing the poverty gap rate. Moreover, the degree of positive effect of the poverty

rate decline decreased when the elderly living in rural areas together were considered. This might be because the vast majority of the elderly poor happen to live in rural areas. However, even if the elderly poor in rural areas are taken into consideration, the positive effect of poverty gap rate decline increased in ordinary income dimension but decreased slightly in disposable income section whose degree is not significant. This result reconfirms that the Basic Old-Age Pension is more effective in decreasing the poverty gap rate than the poverty rate.

Table 4.13 The Effect of the Basic Old-Age Pension on both Poverty Rate and Poverty Gap Rate of Older People in 2009

		Ordinary Income			Disposable Income			
		Before Receiving Basic Old-Age Pension	After Receiving Basic Old-Age Pension	Effect of Improvement	Before Receiving Basic Old-Age Pension	After Receiving Basic Old-Age Pension	Effect of Improvement	
PR (%)	Excluding Older People Living in Rural Areas	A	52.2	48.9	6.5	53.5	50.8	5.1
		B	32.9	30.1	8.5	35.5	32.4	8.9
		C	52	39	25.1	54.6	42.3	22.6
		D	64.6	57	11.7	65.5	57.1	12.8
		E	15.8	14.3	9.8	17.8	16.1	9.4
	Total	39.5	35.1	11	41.3	36.8	10.9	
	Including Older People Living in Rural Areas	A	47	43	8.6	60.7	57.3	5.6
		B	36.8	33.8	8.2	41.7	39.7	4.8
		C	51.3	43.2	15.9	49.1	46.8	4.7
		D	65.5	58.3	10.9	70.7	66.2	6.3
E		23	22.2	3.2	24.1	23.5	2.6	
Total	41.4	37.8	8.7	46.9	44.3	5.5		
PGR (%)	Excluding Older People Living in Rural Areas	A	26	21.5	17.2	27.8	23.3	16.2
		B	15.4	13.4	12.9	16.5	14.4	12.4
		C	22.1	15.1	31.7	23.6	16.6	29.4
		D	30.9	22.6	26.8	31.8	23.4	26.3
		E	5.6	4.8	13.7	6.2	5.4	13.5
	Total	15.3	12.3	19.6	16.3	13.2	18.8	
	Including Older People Living in Rural Areas	A	19.8	15.2	23.4	35.1	27.8	20.6
		B	15	12.8	14.9	21.3	18.5	13.2
		C	19.7	12.9	34.4	26.6	19.6	26.3
		D	28.3	19.9	29.6	38	27.8	26.9
E		9.4	7.4	21.2	11.8	10.4	11.4	
Total	16.7	12.4	25.7	23.3	18.9	18.6		

Note: PR (Poverty Rate), PGR (Poverty Gap Rate), A (Both husband and wife are 65 years and over), B (Only either husband or wife is 65 years and over), C (Male older person living alone), D (Female older person living alone), E (Older people living with children), The effect of improvement = (poverty rate before receiving Basic Old-Age Pension benefit – poverty rate after receiving Basic Old-Age Pension benefit / poverty rate before receiving Basic Old-Age Pension benefit) × 100.

Source: Seok H-S (2010: 345-346)

On the other hand, there are several problems that may be classified broadly into four dimensions. The first limitation is related to the institutional constraints of the Basic Old-Age Pension. Specifically, the unclear policy identity of the Basic Old-Age Pension brings about an institutional constraint (Kang and Choi, 2010). In other words, the Basic Old-Age Pension is not a social insurance because the benefit is provided to people who did not contribute. Moreover, it is not a public aid in that it excludes those who could not pass the means test. This lack of clarity plays a key role as an institutional constraint hindering the extension of its coverage and amount of benefit. Additionally, the current system fixes the total number of recipients of the Basic Old-Age Pension as 70 per cent of all older people nationally (Yoon, 2012). This institutionally fails to adjust the number of total beneficiaries according to the change of economic conditions.

Second, the current way of funding is not only unsustainable but also ineffective. Even if the Basic Old-Age Pension is not a local government's welfare policy but a national welfare policy funded by the general tax, a great deal of money derived from local governments' funding stream. For example, around 46.8 per cent on average of the revenue allocated to social welfare for the elderly in every local government in South Korea was applied just to the Basic Old-Age Pension in 2009 (MHWFA and KIHSA, 2009). Therefore, if the current funding structure continues, it will push every local government into financial difficulty when preparing for the increase in cost caused by an ageing population (Nam, 2010). Furthermore, because the revenue for the Basic Old-Age Pension from the central government to local government is structured according to the rate of the elderly in local government and the degree of fiscal self-reliance rate, local governments that have a big demand for the Basic Old-Age Pension but a shortfall in local revenue are less likely to produce or operate a cost-effective practice.

Third, the mismatch between the governing and practising bodies results in the

inflexibility of the policy. The characteristics of the Basic Old-Age Pension resemble public aid by means test and participation is seen as a more or less mandatory affair by the central government. This means that local government does not have a legitimate right to decide any specific policies in regard to the Basic Old-Age Pension. Even if it is the organization that manages the programme directly, it carries out its work by administrative order from the central government. For example, if social workers in the local government know the conditions in their district better than officers in the central government, they cannot provide more financial resources to seriously deprived elderly more than the amount permitted by the central government since the local government does not have the autonomy to decide any alternative options but can only apply the rules ordered by the central government.

Finally, administrative failures induce unnecessary costs as well as undermining a user-oriented service. For example, replacing the current reviewing system by the local government with a central reviewing system would increase administrative efficiency since the specific conditions of qualification are the same for every local government (Chung 2008). Moreover, merging the overlapped administrative affairs of the Basic Old-Age Pension with the National Pension Scheme will free social workers and officers from unnecessary pressures from the fragmented administrative system. Furthermore, since the elderly generally have difficulty with mobility a more user-oriented policy would be to provide them with the option to apply for the Basic Old-Age Pension by the internet, telephone, or post as well as call into the local government offices in person. Additionally, older people who are living alone should be visited by social workers to help with submitting the application.¹⁷

¹⁷ In fact, the government does not devote the maximum effort to increasing the number of application from the poor older people but tries to meet the criterion of the total rate (70 per cent) of recipients due to a committee of the National Assembly checks whether the government meets the figure (Yoon, 2012).

4.4. Conclusion

So far we have thoroughly examined the public pension systems, i.e. both the National Pension Scheme and Basic Old-Age Pension for later life in contemporary South Korea. Although the National Pension Welfare Act was passed in 1973, the National Pension Scheme was formally started from January 1988. Since then, the total number of participants of the National Pension Scheme has been increasing gradually, with an exceptionally sharp increase between 1998 and 1999. This phenomenon was attributable to the progressive social welfare policy of the Kim Dae-jung government, which expanded the social security net to tackle the side-effects of the economic crisis. The total amount of the National Pension Scheme contribution is decided by taking the average monthly salary calculated based on the total yearly income multiplies with the contribution rate. The contribution rate is 9 per cent, equally divided into 4.5 per cent paid by employers and employees since 1998. Those who are economically deprived, such as farmers and fishermen, can be subsidized for their contribution (at most 50 per cent of the total amount of contribution from 1 July 1995) – a benefit that will terminate after 31 December 2014 onwards because of the budget limitation. The fundamental structure of the National Pension Scheme benefit is a ‘defined benefit system’ that includes both a Basic Pension Amount and Additional Pension Amount or Dependents’ Allowance. The total coverage of the National Pension Scheme is decreasing as a result of cutting the income replacement rate as a policy response to the population ageing. There are broadly five kinds of benefits, namely old age pension, disability pension, survivor pension, lump-sum refund, and lump-sum death payment.

The reformation of the National Pension Scheme can be classified into two forms, i.e. minor and major reforms. The minor reform extended the National Pension

Scheme to people working in a company employing five or more people in 1992, as well as to rural areas for farmers, fishermen, and self-employed people living in rural provinces in 1995. Major reforms have been carried out twice. In other words, after the first major reform, the National Pension Scheme was extended not only to self-employed people living in urban areas but also to all kinds of labourers including part-time workers but excluding firms which employed fewer than five people in 1999. The first reform also decreased the income replacement rate from 70 per cent to 60 per cent as well as suggesting a plan to increase the pensionable age to 65 years in 2033. There are five key results from the second reform. The first, the income replacement rate of those who contributed for 40 years dropped to 50 per cent by 2008, and it is scheduled to reduce down to 40 per cent in 2028 by incrementally decreasing 0.5 per cent every year after 2008. Second, if those who are aged under 65 are engaged in income-earning work, they are able to receive the active old-age pension from the age of 60. Third, pensioners can get a full pension benefit from one pension with a partial benefit from another pension if they are entitled to receive more than two pensions. Fourth, both husband and wife can receive ongoing survivor pension benefit from 55 years, regardless of their income when their spouses died. Finally, the second major reform suggested a new regulation to promote gender equality by introducing the pension credit system for men who finished military service and women who had borne children.

The National Pension Scheme showed both policy success and failure. In other words, the National Pension Scheme is successful as a policy in that it achieved improved social solidarity through income distribution within generations as well as intra-generationally. However, it still revealed problems such as the failure of many people to join the programme to date, and the presence of the 'dead zone of the National Pension Scheme'.

Meanwhile, the introduction of the Basic Old-Age Pension was announced by the government in June 2006 but it was formally started in January 2008. The Basic Old-Age Pension is available only for older people aged 65 and over who pass the means test based on their financial condition. The number of recipients of the Basic Old-Age Pension has increased steadily. It should be noted that there is a gender difference. In other words, there have been more female beneficiaries than male recipients since its implementation. The possible explanation is related to the characteristics of older women such as their life expectancy and prevalent poverty. For example, there are more older women than older men in total owing to the relatively higher life expectancy of older women compared with older men. Older women are much more impoverished than older men, i.e. the so called ‘feminization of poverty’ in South Korea increased the likelihood of this impoverishment. The total cost of the Basic Old-Age Pension has increased continuously since its implementation. However, the cost is completely covered by the general tax and every local government manages the funding system with financial aid from the central government. Since the Amendment Act of the Basic Old Pension in July 2007 the delivery of the Basic Old-Age Pension has been managed by local government, a branch of the National Pension Service, the Happiness ‘e’ um, and the relevant government institutions which handle personal information. The total amount of the Basic Old-Age Pension benefit is fixed at 5 per cent of the average monthly income during the immediate three years prior to the date when an individual starts receiving benefits from the National Pension Scheme.

Although it is somewhat premature to comprehensively evaluate the success and failure of the Basic Old-Age Pension because only five years have passed since its implementation, some preliminary evaluations can be done with caution. For example, the Basic Old-Age Pension was a successful policy in that it contributed to decreasing the

poverty of older people to some degree. However, there are still several problems, namely the institutional constraints caused not only by the opaque character of the policy, but also by its inflexibility in fixing the total number of beneficiaries, the unsustainable and ineffective current funding system, the mismatch between the governing and practising bodies, and administrative failures causing unnecessary costs as well as undermining the user-oriented service.

The above examination of the National Pension Scheme and the Basic Old-Age Pension is of prime importance for this thesis because these two programmes are the key governmental interventions for late-life happiness in South Korea. In other words, it is necessary to have a clear understanding both of the National Pension Scheme as the most comprehensive public pension programme and the Basic Old-Age Pension as the directly older-people-targeted public pension scheme in that they are the fundamental public sources of old-age income security in South Korea. Considering the fact that the income security in old-age is critical to late-life happiness, it can be assumed that the influence of both pensions on happiness in later life is substantial in South Korea.

In the next chapter, we will specify the methodology for addressing the research questions of the thesis logically as well as empirically.

Chapter 5

Methodology

5.1. Introduction

This chapter aims not only to logically draw specific research hypotheses based on the previous empirical studies to address research questions but also to operationalize the relevant variables to test the hypotheses statistically. Having considered the data limitations of the nationally representative Korean Longitudinal Study of Ageing (KLoSA), which was exploited for statistical analyses, the thesis operationalized broadly six dimensions of indicators. In other words, socio-demographic status includes age, gender, marital condition, and religiosity; and socio-economic status includes education, total amount of income, employment condition, and ownerships of a vehicle and a house. Health condition encompasses Activities of Daily Living (ADL), Instrumental Activities of Daily Living (IADL), depression, and subjective health condition. Intergenerational solidarity includes structural solidarity, associational solidarity, and functional solidarity. The public pension systems contain both the National Pension Scheme benefit and the Basic Old-Age Pension benefit and, finally, happiness. Then the thesis suggests several appropriate analysis methods followed by the chapter summary.

5.2. Hypotheses

It is necessary to build sophisticated and plausible research hypotheses in order to address our research questions logically by using a quantitative data set. Therefore, those hypotheses will be drawn from the previous empirical studies regarding significant associations not only between intergenerational solidarity and happiness in later life but also public pension systems and happiness in later life. Firstly, it is widely accepted that intergenerational solidarity is significantly associated with the happiness in later life

(Ross, Mirowsky, and Goldstein, 1990; Hughes and Waite, 2002). In general, the evidence shows either a positive relationship or no relationship between intergenerational solidarity and the extent of happiness in later life.

For example, structural solidarity either does not significantly affect the degree of happiness in later life or positively influences on the level of happiness in later life. For example, Ryan and Willits (2007) found that the number of close kin in the family did not significantly affect the level of happiness in later life by analyzing a part of a sample selected from the 2001 wave of the Pennsylvania Longitudinal Study. Similarly, Haller and Hadler (2006) analyzed the World Values Survey conducted in 1995-1997 and found that having children did not significantly affect the level of happiness. However, close geographical proximity to adult children can significantly improve the extent of happiness in later life (Gabriel and Bowling, 2004). Similarly, Ward, Barnes, and Gahagan (2012) reported that children's living far away from older parents is an influential source of sadness in older parents after interviewing 11 older people aged between 60 and 87 and living in Brighton and Hove in England.

Associational solidarity significantly and positively influences the degree of happiness in later life. For instance, Putnam (2000) and Sherbourne, Hays, and Wells (1995) reported that more frequent face-to-face meetings with children affected parents' level of happiness positively. Moreover, Umberson (1992), Gabriel and Bowling (2004), and Lundholm and Malmberg (2009) found that very frequent contact with adult children is more beneficial to happiness in later life. Ward, Barnes, and Gahagan (2012) interviewed 11 older people aged between 60 and 87 and living in Brighton and Hove in England and found that when older people lack communication with children they feel emotional despair as well as unhappiness. Ingersoll-Dayton, Morgan, and Antonucci (1997) also reported that contact with children significantly increases the level of

happiness in later life. Hirschman (1996) and Bruni and Stanca (2005) also reported that more frequent meeting and contact can increase the degree of happiness in later life because they provide comfort and pleasure.

Furthermore, many studies report that functional solidarity is significantly positively associated with the happiness in later life. For example, Thompson and Heller (1990), Russell and Cutrona (1991), and Silverstein and Bengtson (1994) found that adult children's support improved the level of happiness in later life. Similarly, providing non-financial support for family members such as provision of caring for grandchildren is associated positively with happiness in later life (Gabriel and Bowling, 2004; Waite and Gallagher, 2000).

Unfortunately, it is almost impossible to find empirical studies that have analyzed the direct effect of the public pension systems on happiness in later life. Although indirect, we can infer research hypotheses through drawing implications from both literary studies and empirical studies that analyzed the impact of other welfare programmes on happiness in later life.

Regarding some narratives, it should be noted that historically welfare programmes were born within capitalism to tackle the side-effects of capitalism itself. In other words, as Marx (2007 [1927]), Polanyi (1944), and Lindblom (1977) showed, it is widely accepted that people living under capitalism are structurally alienated from their very being. In this context, Esping-Andersen (1990: 36) argued that "the market becomes...it is imperative to behave as a commodity in order to survive". These all reflect that as society mitigates the negative effects of capitalistic institutions by implementing new welfare programmes or reforming existing welfare programmes more progressively, psychological stress will be diminished, and thereby the degree of the happiness will be increased (Rothstein, 2010).

There are still only a few empirical studies analyzing the effect of welfare programmes on the happiness in later life, and generally they report a positive association. For example, Lerner (1944) showed that income distribution through welfare programmes could increase the level of happiness by increasing opportunities in a daily life. Radcliff (2001) analyzed the World Values Survey conducted in 1990 that included 15 countries: Austria, Belgium, Canada, Denmark, Finland, France, Germany, Britain, Ireland, Italy, the Netherland, Norway, Sweden, United Sates of America, and Japan. The average sample size was around 1,600 for each country except Finland (around 588). He found that the less market-oriented they were, the happier all countries were. In recent years, Pacek and Radcliff (2008) utilized several waves of the World Values Survey and compared the relationship between the social security system and happiness among ten European countries, including Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, Netherlands, and Sweden. They finally found that social security is positively associated with the degree of happiness. Similarly, Kotakorpi and Laamanen (2010) analyzed around 1,000 participants in the Finnish life satisfaction data selected from the World Values Survey conducted in 2000. They found that health care publicly funded by the government is positively associated with the level of happiness. TUC (Trade Union Congress, 2012) also reported that the effect of the social security system positively affected people's happiness by helping them to spread their financial resources over their lifetime, and could thus serve as a form of income security during later life.

Consequently, the discussions above provide us with the following eight specific research hypotheses.

- *Hypothesis 1*: There is either no, or a positively significant relationship between structural solidarity and the degree of happiness in later life.

- *Hypothesis 1-1*: There is no significant relationship between the number of adult children and the degree of happiness in later life.
 - *Hypothesis 1-2*: There is a positively significant relationship between geographical proximity to adult children and the degree of happiness in later life.
- *Hypothesis 2*: The stronger the associational solidarity, the higher the degree of happiness in later life.
- *Hypothesis 2-1*: The more frequent the face-to-face contact with adult children, the higher the degree of happiness in later life.
 - *Hypothesis 2-2*: The more frequent the contact with adult children by telephone or (e)mail, the higher the degree of happiness in later life.
- *Hypothesis 3*: There is a significantly positive relationship between functional solidarity and the degree of happiness in later life.
- *Hypothesis 3-1*: The more financial support they receive from or provide to their adult children, the higher the degree of happiness experienced by parents in later life.
 - *Hypothesis 3-2*: Receiving non-financial support from or providing non-financial support to their adult children, the higher the degree of happiness in later life.
- *Hypothesis 4*: There will be a difference in the significant relationship between public pension systems and the degree of happiness in later life by gender.
- *Hypothesis 4-1*: Receiving the National Pension Scheme benefit will increase the degree of happiness in later life.
 - *Hypothesis 4-2*: Receiving the Basic Old-Age Pension benefit will increase the degree of happiness in later life.

5.3. Data

To test the research hypotheses empirically, this thesis adopts the second wave of KLoSA (weighted and imputed version), which was conducted by the Korea Labour Institute (KLI) using CAPI (Computer Assisted Personal Interviewing) in 2008. The main purpose of conducting the KLoSA was to produce not only a nationally representative but also a quantitatively comprehensive data set on complicated ageing issues in order to successfully address every problem caused by an ageing population in contemporary South Korea (Bu and Chang, 2006; Shin, Bu, and Ban, 2005). KLoSA is mainly made up of seven sections, including demographics, family affairs, health condition, employment, income, assets and debts, and expectations. In the demographic section, respondents were asked to answer their age, gender, religion, marital status, and education level. The family required information about the number of children, frequency of contact, proximity to children, amount of transfer, and home and vehicle ownership. Various clinical diagnoses, ADL, IADL, health behaviours, and health insurance and services were included in the health condition section. In the employment section, questions on occupation, retirement, and pensions were asked. The income section asked about income level, savings, and private insurance. The asset section asked about the amount of real estate, stocks, bond, bank loans, and so on. Finally, the expectation section asked about the degree of expectation of life expectancy, unification with North Korea, and inheritance.

5.3.1. Sample Description

The KLI interviewed individuals aged 45 and over selected from throughout the country except Jeju Island. The sampling method is a stratified multi-stage area probability based

on the Korean Population and Housing Census in 2005 (see appendix 2). Once communities were stratified into urban and rural areas, they were classified into apartment and ordinal housing areas. Consequently, 8,688 persons in total were interviewed in 2008 and the response rate was 86.9 per cent (KLI, 2009).

Like other national ageing surveys, such as the Health and Retirement Study (HRS), the English Longitudinal Study of Ageing (ELSA), and the Survey of Health, Ageing and Retirement in Europe (SHARE), the sampling unit of KLoSA is each individual. However, KLoSA can be differentiated from the other studies in two ways.

The first, unlike the three national surveys which sampled people aged 50 and over, KLoSA expanded it to include people aged 45 and over. This is because most of the baby boom generation, which occupies around 14.6 per cent of the total population, experienced severe unemployment during the economic crisis in 1997 and the latent effects of the financial crisis still linger. Furthermore, some of them retired after the economic crisis and the vast majority of the remainder left their workplaces from 2010 (KNSO, 2010b). Therefore, KLoSA has tried to delve into the dynamics of life after the mid-40s.

The second difference originates from the cultural differences of ownership. In both HRS and SHARE, if a couple managed accounts or assets together, only one of them answered questions in the income and asset section, but if they managed them separately, both were interviewed. In ELSA, couples are regarded as an economic unit even if income and assets are individually managed, and thus only one of them was selected as an interviewee for the income section. However, most Koreans still believe assets should be owned by men, although there is a change in ownership perception among the young generation, and most of them have separate accounts. Therefore, KLoSA used the ownership-based system for identifying income and assets unless they could be counted

twice or omitted.

5.3.2. Measures

5.3.2.1. Socio-Demographic and Economic Status

In this thesis, socio-demographic and economic status includes age, gender, marital status, religion, education, the total amount of income, employment, and ownership of a vehicle and a house. Age is measured by continuous numbers from 45 to 64 for the middle-aged group and 65 years and over for older group. Gender is coded as a dummy variable, indicating women as 1. Marital status is also handled as a dummy variable as those who have spouses are recoded as 1. Similarly, those who have any religion are recoded as 1, otherwise 0. Education was coded on a four-point Likert-scale, namely, 1 = less than elementary school, 2 = middle school, 3 = high school, and 4 = university education and over. Therefore, the higher score indicates the better education status. Employment status was handled as a dummy indicator, giving those who are working as 1. Total amount of income was calculated by adding up the total amount of earned money and total amount of assets with side income from the assets. The income variable did not include financial transfer from family members or public pension benefits. Finally, the ownership of both a vehicle and a house was handled as dummy variables as having a vehicle or a house is 1, and not having is 0.

5.3.2.2. Health Condition

Health condition was divided into three kinds of dimensions, namely physical health,

mental health, and subjective health condition. The general indicators for evaluating a physical health condition are both ADL and IADL. The former refers to the basic tasks of everyday life and is essential for independent living. By contrast, the latter, developed by Lawton and Brody (1969), is not essential for fundamental functioning but helps with independent living. In our data, both indicators are measured by a three-point scored Likert-scale, namely, 1 = need no help, 2 = need partial help, and 3 = need help totally. Hence, the lower score means a higher level of ADL and IADL capability. Cronbach's alpha coefficients of the final ADL and IADL of middle-aged and older people are .972, .969 and .925, .961, respectively. The extent of coefficients is much bigger than the cut-off, thus enough reliability is achieved to use as one unified variable (Huysamen, 2006; Cortina, 1993; Cronbach, 1951).

In this thesis, mental health refers to depression in later life. Generally, there are various tools for measuring depression conditions, such as the General Health Questionnaire designed by Goldberg (1972), Kessler Psychological Distress Scale (K10) developed by Kessler and Mroczek (1994), and the Centre for Epidemiologic Studies Depression Scale (CES-D Scale) designed by Radloff (1977). Among them, KLoSA adopts the CES-D Scale to measure depression as a condition in South Koreans. CES-D Scale was designed to measure the depression condition rather than clinical depression in general people in the community with emphasizing cognitive and affective element as well as general depressive mood (Radloff, 1977).

Although the original CES-D Scale usually contains 20 specific indicators, KLoSA used the summarized version, which is translated into Korean. The Korean version of CES-D has been validated by many previous researches such as Cho, Nam, and Suh (1998) and Noh, Avison, and Kaspar (1992). It contains ten specific indicators, including losing interests in doing something, having difficulty in concentrating on doing

something, generally feeling depressed, losing energy and feeling tired, feeling well, feeling afraid, having difficulty in sleeping, feeling non-grievance, feeling lonely, and feeling worthless.

The KLoSA questionnaire asked respondents how they experienced each feeling during last week. These are all measured by a four-point scored Likert-scale, i.e. 1 = almost never (less than one day), 2 = sometimes (one or two days), 3 = often (three or four days), and 4 = always (five or seven days). Among them, two variables, namely, feeling well and feeling non-grievance, were negatively recoded to unify the direction of measurement with others. Therefore, the higher score means the higher the level of depressed condition. Cronbach's alpha coefficients of the final depression variable of both middle-aged people and older people are .822 and .882, respectively. Again, the extent of all coefficients is much larger than the cut-off so that enough reliability is achieved to use as one unified variable (Huysamen, 2006; Cortina, 1993; Cronbach, 1951).

Meanwhile, in light of Idler and Benyamini's (1997) argument that one's health condition cannot be fully measured without the subjective evaluation of health condition (Idler and Benyamini, 1997), the thesis also considers subjective health status. Subjective health status means self-reported or self-rated or self-assessed health status (Tubeuft et al., 2008) and it has already become one of the core indicators measuring health status in the gerontology discipline (Baron-Epel and Kaplan, 2001).¹⁸ Measuring subjective health status started around the 1960s (Idler and Kasl, 1995) and expanded in the 1980s (Idler and Benyamini, 1997), mainly in Europe, North America, and Asia (Idler, 2003).

During that period, there were two novel streams triggering this trend. First,

¹⁸ Even though it is widely accepted that measuring the subjective health status is not only reliable and valid but also stable (Fosse and Haas, 2009), "(solely) relying on it can be extremely misleading" (Sen, 2002: 861, italics added by the author) because the status inherently depends on subjective perceptions (Baker, Stabile, and Deri, 2001; Van Doorslaer and Gerdtham, 2003; Etile and Milcent, 2006) and the power of explanation decreases in over long term (Benyamini et al., 2003).

great attention was paid to psychosocial epidemiology after publication of the nine-year longitudinal study of Alameda County Residents (Berkman and Syme, 1979). Second, in medicine, Verbrugge and Ascione's (1987) analysis on how medical system cannot capture an individual's subjective health perceptions (in their own term, 'iceberg') focused medical professionals' attention on the importance of self-reported health status. In the mean time, the seminal work accelerating this trend was the Manitoba Longitudinal Study, which surveyed 3,128 non-institutionalized older people. It showed that Canadian older people's self-rated health status was a better indicator than their physical health indicator (Mossey and Shapiro, 1982). Furthermore cost-effectiveness and feasibility for large surveys increased the usability of governmental projects (Newell et al., 1999; Van Doorslaer, Bago d'Uva, and O'Donnell, 2007).

Generally, there are two ways of measuring subjective health status, namely general subjective health status and age-related subjective health status. The former uses a certain phrase, 'in general', 'overall', 'general health' or 'all in all', whereas the latter uses 'compared to others your age' in the questionnaire (Baron-Epel and Kaplan, 2001: 1374). The general measurement of subjective health status is a five-point Likert scale, i.e. from very good to very poor (Alexopoulos and Geitona, 2009; Subramanian, Huijts, and Avendano, 2010).

Meanwhile, the KLoSA approach is similar to the general way of measuring subjective health status. In other words, KLoSA estimates one's subjective health status through measuring the overall evaluation of an individual's self-reported health status by asking, "Overall, how would you evaluate your health status?". It is scored by 100 points on a scale from 0 (worst) to 100 (very good) by using a ten continuous Likert-scale. Therefore, the higher score means the better the condition of subjective health status.

5.3.2.3. Intergenerational Solidarity

Of six specific dimensions of intergenerational solidarity, this thesis utilizes only three variables, including structural solidarity, associational solidarity, and functional solidarity, owing to the limitation of data availability.

More specifically, structural solidarity is measured through the number of adult children by asking, “How many live adult children do you have?” as well as by the geographical proximity to adult children by asking, “How close do your adult children live to you?”. The latter is coded by using a four-point scored Likert-scale, i.e. 1 = within 30 minutes by public transportation, 2 = within one hour by public transportation, 3 = within two hours by public transportation, and 4 = more than two hours by public transportation. Therefore, the higher score means the farther distance.

Associational solidarity is measured by both the frequency of face-to-face meetings by asking, “How often have you met your children in person?” and the frequency of contacting via telephone, letter or email by asking, “How often have you contacted with your children by phone, mail or email?”. Both variables are originally coded from 1 (almost every day) to 10 (never) but they are recoded using a six-point scored Likert-scale from at least once a month to never. Therefore, the higher score means a lower level of associational solidarity.

Finally, functional solidarity is assessed in terms of both financial and non-financial support from adult children to older parents and from older parents to adult children. On the one hand, financial functional solidarity from adult children to older parents is evaluated by the total amount of money and was classified into five categories based on 1,000,000 won interval. Financial support from older parents to adult children is measured by dummy variable: whether older parents ever gave their money to their adult

children. On the other hand, non-financial support, both from adult children to older parents and from older parents to adult children, is handled as a dummy variable, namely, if they provided any type of non-financial support, it is coded as 1, otherwise 0.

5.3.2.4. Public Pension Systems

The present thesis used two kinds of public pension systems, namely the National Pension Scheme and the Basic Old-Age Pension. However, both programmes are applied to the older people group only, because middle-aged people are not eligible for the programmes. In other words, not only did almost all middle-aged people in the sample not receive the National Pension Scheme benefit, but they are also not eligible to receive the Basic Old-Age Pension benefit because of the age criterion. The National Pension Scheme for older people was handled using a dummy variable, i.e. whether older people received the National Pension Scheme benefit or not (yes = 1, no = 0). Similarly, the Basic Old-Age Pension for older people was handled as a dummy variable, i.e. whether they received the Basic Old-Age Pension benefit or not (yes = 1, no = 0).

5.3.2.5. Happiness

In this thesis, happiness is measured by overall evaluation of one's level of feeling happiness by asking, "Compared with your contemporaries, overall, how happy do you feel?" This is scored by a 100-point scale from 0 (never) to 100 (very happy) by using a ten continuous Likert-scale. Therefore, the higher score means the higher level of happiness.

5.4. Analysis Strategy

Although most of all factors affect the happiness in later life simultaneously the context and results of the relationships are not same: rather, it differs according to either being in the middle-aged group or the elderly age group (Hooyman and Kiyak, 2011; Morgan and Kunkel, 2011; Holstein, Parks, and Waymack, 2010). Therefore, the thesis classifies the sample into middle-aged and older people to tackle the research questions.¹⁹

Through statistical analysis of the data set, the first research question, i.e. the characteristics of the intergenerational solidarity, public pension systems, and the happiness in later life by gender, will be addressed by descriptive statistics such as frequency, percentage, mean, graph of mean change, the stream of exchanged rate, and cross-tabulation. In order to address the second research question, namely the significant relationship between the intergenerational solidarity and happiness in later life, hierarchical multiple regression²⁰ will be carried out to estimate the power of structural solidarity, associational solidarity, and functional solidarity to predict the degree of happiness in later life, with controlling for the effects of socio-demographic and economic status, health condition, public pension systems. For the final research question, i.e. the significant relationship between the public pension systems and the happiness in later life, hierarchical multiple regression will be applied again, to evaluate the power of both the National Pension Scheme and the Basic Old-Age Pension to predict the degree of happiness in later life, with controlling for the effects of socio-demographic and

¹⁹ The thesis intends to analyse the data by classifying the sample into those who co-reside with adult children and those who do not live with their adult children. This is because intergenerational co-residing is a very important factor for late-life happiness in general. The thesis unfortunately cannot consider the intergenerational co-residing factor due to the quality of data set.

²⁰ The parameter estimate, i.e. a coefficient for a certain variable in the hierarchical multiple regression, provides an estimated power of that variable on the dependent variable with controlling for all other variables in the model (Dougherty, 2011).

economic status, health condition, and intergenerational solidarities. Correlation analysis is also carried out before running all regressions according to the nature of the variables. All assumptions, including normality, linearity, singularity, multicollinearity, and homoscedasticity, were met before running multiple regressions.

5.5. Conclusion

In this chapter, we have logically drawn eight specific research hypotheses based on previous studies to empirically address the research questions. In other words, the first hypothesis suggests that there is no or a positive association between structural solidarity and happiness in later life. The second hypothesis indicates that there is a positive association between the associational solidarity and happiness in later life. The third hypothesis suggests that there is a positive association between the functional solidarity and happiness in later life. The final hypothesis suggests that there is a positive association between the public pension systems and happiness in later life.

To test the hypotheses, we chose the nationally representative quantitative data set, KLoSA. Then all relevant variables such as socio-demographic and economic status, health condition, intergenerational solidarity, public pension systems, and happiness were operationalized to make them appropriate for a statistical test. It should be noted that owing to data limitation, we could not operationalize all six dimensions of the intergenerational solidarity but only three of them, namely the structural, associational, and functional solidarity. Finally, the main methods of analysis, such as descriptive statistics, correlations, and hierarchical multiple regression, were explained for each research question. In the next chapter, we will address the first research question through descriptive statistics.

Chapter 6

The Characteristics of Family Support, Public Pension Systems, and Happiness in Later Life in Contemporary South Korea

6.1. Introduction

This chapter aims to address the first research question, namely the characteristics of intergenerational solidarity, public pension systems, and happiness in later life by gender. They are analyzed by using descriptive statistics, such as the frequency, percentage, mean, graph of mean change, the stream of rate exchanged, and cross-tabulation. The analysis will first account for the socio-demographic and economic status and health condition in later life by gender. Then the characteristics of intergenerational solidarity will be analyzed according to specific dimensions, including structural solidarity, associational solidarity, and functional solidarity by gender. Third, the characteristics of not only the public pension systems, including the National Pension Scheme and the Basic Old-Age Pension, but also happiness will be addressed by gender. The result of cross-tabulation analyses that can show the diverse relationships among all of the above variables will be explained in each relevant section, followed by the chapter summary.

6.2. Socio-Demographic and Economic Status in Later Life

The table 6.1 illustrates the socio-demographic and economic status in later life by gender. In total, 4,648 middle-aged people responded to the survey. There were more middle-aged women (2,565) than middle-aged men (1,925). There was no prominent gender difference in socio-demographic status, in general. For example, the vast majority of both middle-aged women (85.1 per cent) and men (92.4 per cent) were married. About 41 per cent of middle-aged women and 60 per cent of middle-aged men were irreligious. Buddhism was the major belief system, followed by the Protestantism in both groups.

However, there is generally a marked gender difference in socio-economic status

except where house ownership is concerned. Specifically, regarding the level of education, the proportion of middle-aged men who finished university education and over was almost three times greater than that of middle-aged women. In contrast, about 35 per cent of middle-aged women completed only elementary school education while about 17 per cent of middle-aged men did. This gender difference continues in labour market participation. In other words, almost twice as many middle-aged men (80.2 per cent) were working as middle-aged women (44.3 per cent). Furthermore, about three times more middle-aged men (16 per cent) earned over 40,000,000 won than middle-aged women (5.8 per cent), while around twice more middle-aged women (49.5 per cent) earned less than 10,000,000 won than middle-aged men (27.1 per cent). Moreover, over five times more middle-aged men (58.1 per cent) have a vehicle than middle-aged women (10.4 per cent). However, the rate of having a house is similar at 80 per cent both for middle-aged women and men.

A total of 4,040 older people responded to the survey and they included more older women (2,356) than older men (1,684). There was a noticeable gender difference in marital status. In other words, over twice as many older men (89.6 per cent) were married as older women (46.4 per cent). It should be noted that almost six times more older women (51.9 per cent) were bereaved than older men (9 per cent). Around 42 per cent of older women and 60 per cent of older men were irreligious and Buddhism was also the major belief system here, followed by Protestantism in both groups.

As was shown previously for middle-aged people, there is a gender difference in socio-economic status of older people, except in house ownership. Regarding the level of education, the proportion of older men who finished university education was almost ten times larger than that of older women. Further, around 86 per cent of older women had completed only elementary school education, whereas 51 per cent of older men had done

so. The gender difference continues in employment. In other words, more than twice more older men (32.5 per cent) than older women (14.8 per cent) were working. In regard to income, around twice more older men (2 per cent) had over 40,000,000 won than older women (1.1 per cent), while more older women (49.3 per cent) than older men (41.1 per cent) had less than 10,000,000 won. Moreover, almost 12 times more older men (19.1 per cent) have a vehicle than older women (1.6 per cent). However, there was not a big difference between older women and men regarding the ownership of a house.

Table 6.1 Socio-Demographic and Economic Status in Later Life by Gender

		FMAP (N=2,565)		MMAP (N=2,083)		FOP (N=2,356)		MOP (N=1,684)	
		F	%	F	%	F	%	F	%
Age	45-54	1,285	50.1	966	46.4				
	55-64	1,280	49.9	1,117	53.6				
	65-74					1,390	59	1,115	66.2
	75+					966	41	569	33.8
Marriage	Married	2,183	85.1	1,925	92.4	1,094	46.4	1,509	89.6
	Separate Living	21	0.8	18	0.9	16	0.7	6	0.4
	Divorced	72	2.8	66	3.2	18	0.8	15	0.9
	Bereaved	266	10.4	37	1.8	1,222	51.9	151	9
	Never Married	23	0.9	37	1.8	6	0.3	3	0.2
Religion	None	1,046	40.8	1,246	59.8	977	41.5	996	59.1
	Protestant	568	22.1	329	15.8	505	21.4	280	16.6
	Catholic	224	8.7	118	5.7	209	8.9	104	6.2
	Buddhist	699	27.3	383	18.4	640	27.2	293	17.4
	Won Buddhist	5	0.2	1	0.0	11	0.5	4	0.2
	Other	23	0.9	6	0.3	14	0.6	7	0.4
Education	Elementary School or Less	890	34.7	357	17.1	2,025	86	858	51
	Middle School	584	22.8	385	18.5	180	7.6	253	15
	High School	905	35.3	905	43.4	124	5.3	376	22.3
	Higher Education	186	7.3	436	20.9	27	1.1	197	11.7
Employment	Yes	1,137	44.3	1,671	80.2	348	14.8	547	32.5
	No	1,428	55.7	412	19.8	2,008	85.2	1,137	67.5
Total Amount	0-10,000,000	1,271	49.5	565	27.1	1,160	49.3	693	41.1
	10,000,001-20,000,000	702	27.5	489	23.6	692	29.4	392	23.3

of Income (won)	20,000,001-30,000,000	341	13.3	465	22.4	390	16.5	436	25.9
	30,000,001-40,000,000	102	3.9	229	10.9	88	3.7	118	7
	Over 40,000,000	149	5.8	335	16	26	1.1	45	2.7
Vehicle Ownership	Yes	268	10.4	1,210	58.1	37	1.6	322	19.1
	No	2,297	89.6	873	41.9	2,319	98.4	1,362	80.9
House Ownership	Yes	2,054	80.1	1,666	80	1,899	80.6	1,421	84.4
	No	511	19.9	417	20	457	19.4	263	15.6

Note: F (Frequency), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), One pound (GBP) was worth around 2,050 won in 2008.

6.3. Health Condition in Later Life

6.3.1. Physical, Mental, and Subjective Health Condition in Later Life

Physical health condition in later life is estimated in two ways, namely ADL and IADL. The former consists of seven items, i.e. dressing and undressing; washing face and hair, and brushing teeth; bathing or showering; self-feeding; getting out of bed; using the lavatory; managing bowel and bladder. The latter includes ten dimensions, i.e. grooming; housework; preparing a meal; laundry; community mobility without using transportation; going out by using transportation; shopping; financial management; using telephone; taking medication as prescribed. While both older women and men had somewhat more difficulty in performing IADL than ADL, in general, both female and middle-aged and older men had a very good physical health condition in terms of ADL and IADL and there was no noticeable gender difference (detailed table is presented in appendix 3).

In general, a mental health condition accounts for approximately one third of global disabilities (RGB, 2012). In the thesis, mental health condition in later life is evaluated by looking at depression. Depression in later life is a very serious gerontological problem worldwide, mainly because it reduces positive emotions (Zhang

and Li, 2011) while it increases the feeling of worthlessness (Strawbridge et al., 2002) and the intention to commit suicide in later life (Grek, 2007). The KLoSA lists ten sub-dimensions to evaluate the condition. It includes losing interest in doing something, having difficulty in concentrating on doing something, generally feeling depressed, losing energy and feeling tired, feeling well, feeling afraid, having difficulty in sleeping, feeling non-grievance, feeling lonely, and feeling worthless.

Table 6.2 summarizes the main characteristics of depression in later life by gender, which shows two noticeable points. Firstly, middle-aged people had much lower level of depression than older people in almost all instances, in general. In other words, older people enjoyed a better condition only in two dimensions, feeling well and feeling non-grievance. Second, there was a transparent gender difference both among middle-aged people and older people. For example, around 30-40 per cent and 24-34 per cent of middle-aged women and men, respectively, experienced depression, except two sub-dimensions, i.e. feeling well and feeling non-grievance. However, about 50-65 per cent and 38-50 per cent of older women and men respectively suffered from depression, except for two sub-dimensions of feeling well and feeling non-grievance. This gender difference of South Korean people in later life is consistent with Western studies in that women suffer more from depression than men (Taylor and Lynch, 2004; Fauth et al., 2011; Yang and George, 2005; Palsson, Ostling, and Skoog, 2001; Diener, 1984). This might be because women generally are more open to expressing their feelings than men and consequently report emotions more intensely (Diener, Sandvik, and Larsen, 1985).

Table 6.2 Depression in Later Life by Gender (those who responded ‘almost never’)

	Losing interest in doing something		Having difficulty in concentrating		Generally feeling depressed		Losing energy and feeling tired		Feeling well	
	F	%	F	%	F	%	F	%	F	%
FMAP	1,543	60.2	1,722	67.1	1,708	66.6	1,467	57.2	733	28.6
MMAF	1,438	69	1,553	74.6	1,538	73.8	1,374	66	670	32.2
FOP	973	41.3	989	42	1,022	43.4	832	35.3	415	17.6
MOP	895	53.1	942	55.9	975	57.9	842	50	413	24.5
	Feeling afraid		Difficulty in sleeping		Feeling non-grievance		Feeling lonely		Feeling worthless	
	F	%	F	%	F	%	F	%	F	%
FMAP	1,775	69.2	1,675	65.3	657	25.6	1,701	66.3	1,798	70.1
MMAF	1,533	73.6	1,565	75.1	599	28.8	1,554	74.6	1,583	76
FOP	1,175	49.9	1,004	42.6	409	17.4	1,058	44.9	1,036	44
MOP	1,053	62.5	963	57.2	371	22	1,021	60.6	992	58.9

Note: F (Frequency), FMAP (Female Middle-aged People), MMAF (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), Full information is given in appendix 4.

Table 6.3 summarizes subjective health in later life by gender. Regarding middle-aged people, the mean of subjective health of middle-aged women and men was about 58 and 62, respectively. The vast majority of female (78.6 per cent) and male (88.1 per cent) people responded that their level of subjective health condition was at least 50 and over. Moreover, only 31 female and 29 male middle-aged people evaluated their health as completely bad. Similarly, 25 female and 33 male middle-aged people evaluated their health as completely good.

Regarding older people, the mean of subjective health condition of older women and men was about 45 and 52, respectively. Around half of older women (54.3 per cent) but more older men (67.2 per cent) responded that their degree of subjective health was at least 50 and over. The difference in rates means that the gender difference of older people in the degree of subjective health condition is relatively higher than that of middle-aged people. Meanwhile, 81 and 56 female and male older people respectively evaluated their

health as completely bad. Similarly, 17 male and 18 female older people evaluated their health as completely good.

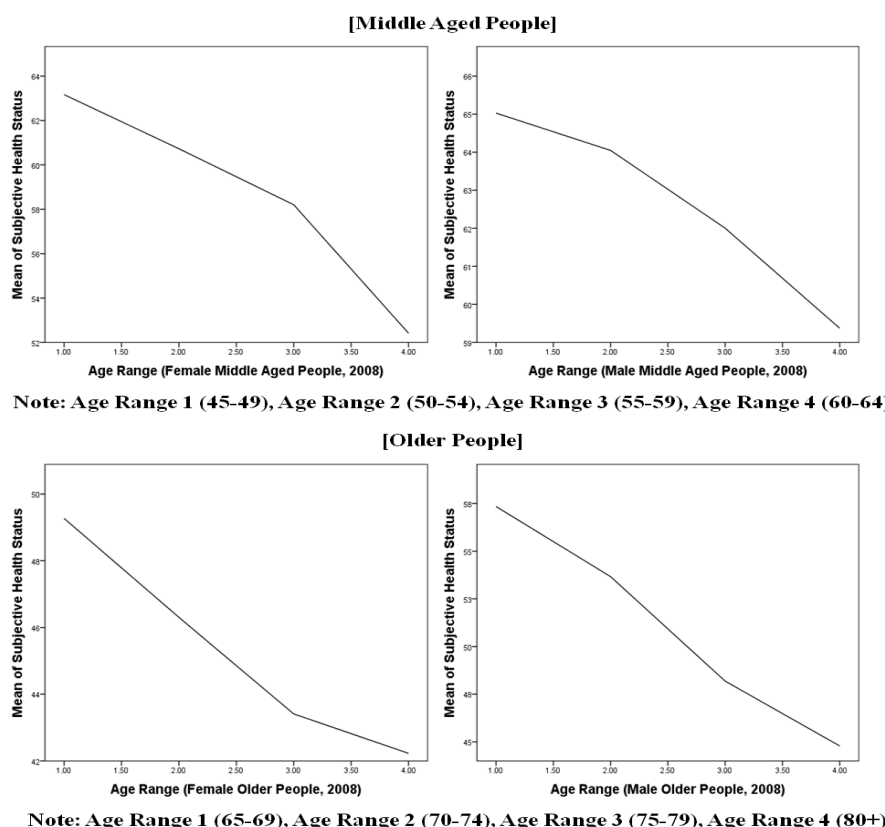
However, figure 6.1 tells us a somewhat different story. In other words, the figure shows that the mean of the subjective health condition of both middle-aged women and men decreases as they get older. Furthermore, the degree of change is relatively different in each group. For example, it decreased slowly before 60 years old but decreased steeply after 60 years in middle-aged women. By contrast, it decreased relatively gradually in middle-aged men. Similarly, the mean of the subjective health of both older women and men decreases as they age. Moreover, the degree of change is relatively different in each group. For example, it decreased slowly after 65 years but decreased steeply after 80 years in older women. By contrast, it decreased relatively gradually in older men. This reflects that the strength of the subjective health condition of both middle-aged and older people decreases as they get older.

Table 6.3 Degree of Subjective Health Status in Later Life by Gender

	FMAP (N=2,565)		MMAP (N=2,083)		FOP (N=2,356)		MOP (N=1,684)	
	F	%	F	%	F	%	F	%
0	31	1.2	29	1.4	81	3.4	56	3.3
10	39	1.5	32	1.5	145	6.2	54	3.2
20	97	3.8	52	2.5	209	8.9	106	6.3
30	190	7.4	119	5.7	349	14.8	158	9.4
40	195	7.6	128	6.1	293	12.4	179	10.6
50	484	18.9	321	15.4	483	20.5	299	17.8
60	436	17	327	15.7	295	12.5	281	16.7
70	521	20.3	399	19.2	264	11.2	282	16.7
80	417	16.3	480	23	174	7.4	205	12.2
90	130	5.1	163	7.8	46	2	46	2.7
100	25	1	33	1.6	17	0.7	18	1.1
Mean/SD	58.57/20.07		62.42/20.53		45.8/22.17		52.52/22.29	

Note: F (Frequency), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

Figure 6.1 Change in Mean of Subjective Health Status in Later Life by Gender and Age Group



6.3.2. Relationship between Socio-Demographic and Economic Status, and Health Condition in Later Life

Table 6.4 illustrates the cross-tabulation analysis between socio-demographic and economic status, and health condition in later life. There are some variations of health condition in later life according to socio-demographic and economic status. Basically, physical health condition is related only with age, whereas both mental health and subjective health conditions are related to age, marital status, religiosity, and employment.

For example, the age of both middle-aged and older people is related with their physical health condition in terms of both ADL and IADL. However, there is no

noticeable gender difference. In other words, younger middle-aged people as well as younger older people have better ADL and IADL conditions.

Similarly, age of both middle-aged and older people is related with their mental health and subjective health condition. In other words, the younger middle-aged and younger older people report lower levels of depression as well as better levels of subjective health than older middle-aged and old older people. It should be noted that there was a gender difference: middle-aged and older men show not only lower depression rates but also a better subjective health than middle-aged and older women.

Meanwhile, there is a noticeable gender difference in the relationship between religiosity and depression both in middle-aged and older people. For example, religious middle-aged and older men report much lower levels of depression than irreligious middle-aged and older men. However, that is not the case for middle-aged and older women. Meanwhile, there was no noticeable gender difference in the relationship between religiosity and the subjective health condition in both middle-aged and older people. This shows that religious middle-aged and older people are more likely to report a higher level of subjective health condition than irreligious middle-aged and older people.

Furthermore, marital status is also related with mental health and subjective health condition both in middle-aged and older people. For example, married middle-aged and older people clearly show lower levels of depression as well as higher levels of subjective health condition than unmarried middle-aged and older people. Moreover, for depression, evidence of this is more compelling among middle-aged people rather than older people but it is the opposite in the subjective health condition. In other words, married middle-aged women and men report lower levels of depression than married older women and men. A much larger rate both of married older women and men reports a better degree of subjective health than married middle-aged women and men.

In a similar vein, employment status is related to mental health condition only in middle-aged people and there is a clear gender difference. In other words, both middle-aged women and men who are employed report lower levels of depression than the unemployed. However, the effect of being employed is more influential on middle-aged men than middle-aged women. Employment is also related to the subjective health condition both of middle-aged and older people but there was no particular gender difference. In other words, middle-aged and older people who are working are more likely to report a better level of subjective health than those who are not employed.

Table 6.4 Relationship among Socio-Demographic and Economic Status, and Health Condition in Later Life by Gender

			ADL		IADL	
			1	3	1	3
Age	FMAP	45-54	99	0.2	98.7	0.6
		55-64	88	5.8	92.8	3.8
	MMAP	45-54	99	0.2	90.8	3
		55-64	87	4.9	87	7.2
	FOP	65-74	96.1	0.5	90.5	5.7
		75+	84.6	9.4	86.7	7.5
	MOP	65-74	94.9	0.8	84.2	8
		75+	86.5	9.9	67.3	13.3
			Depression		Subjective Health	
			1	4	0	100
Age	FMAP	45-54	71.3	0.7	7.9	23.2
		55-64	50.1	26.2	0.7	1.1
	MMAP	45-54	85.8	0.3	5.2	33.3
		55-64	60.4	17.7	2.1	0.7
	FOP	65-74	54.4	1.4	9.7	25.4
		75+	33.2	16.7	7.7	0.8
	MOP	65-74	69.8	0.4	9.8	32.2
		75+	35.7	27.1	8.1	2.1
Religion	FMAP	No	41.3	0.7	17.8	13.1
		Yes	43.1	0.9	2.5	37.3
	MMAP	No	31.3	26.7	16.8	16.1
		Yes	85.3	0.5	3.9	38.3
	FOP	No	39.6	1.4	13.2	15.1
		Yes	41.1	1.7	1.6	37.8
	MOP	No	31.4	33.1	12.7	19.3

		Yes	70.2	0.7	1.4	36.1
Marriage	FMAP	No	13.4	20.9	17.6	9.8
		Yes	50.9	0.8	6.4	30.7
	MMAP	No	10.1	22.9	13.4	7.3
		Yes	44.8	0.4	1.5	32.7
	FOP	No	15.2	27.4	9.1	8.9
		Yes	35.1	11.2	2.7	45.1
	MOP	No	11.3	21.6	11.2	6.9
		Yes	36.7	10.4	3.1	47.6
Employment	FMAP	No	29.8	37.5	9.8	15.4
		Yes	51.9	0.6	2.2	36.2
	MMAP	No	32.8	38.2	7.6	11.1
		Yes	87.1	0.2	3.4	34.5
	FOP	No	31.8	31.4	8.7	7.9
		Yes	33.6	30.9	4.3	39.1
	MOP	No	35.7	33.4	8.1	8.9
		Yes	34	30.4	7.8	37.2

Note: Unit (%), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

6.4. Intergenerational Solidarity in Later Life

6.4.1. Structural Solidarity in Later Life

Table 6.5 shows structural solidarity in later life by gender in terms of the number of adult children as well as the geographical proximity to adult children by public transportation. The majority of the middle-aged people (96.8 per cent) had at least one adult child; the biggest proportion was around 52.1 per cent, for those who have two adult children. Of the middle-aged people, 150 had no adult children. On average, middle-aged people have two adult children. There was no noticeable gender difference regarding the geographical proximity of adult children. The rates of living with all adult children within one hour's distance by public transportation both of middle-aged women and men were almost similar. In other words, the proportions of the first, second, and third adult child's

geographical proximity within one hour's distance by public transportation in middle-aged women were 40.3 per cent, 39.1 per cent, and 41.5 per cent, respectively. Those of middle-aged men were 37.1 per cent, 33.6 per cent, and 37.5 per cent, respectively. Additionally, the proportions of the first, second, and third adult child's geographical proximity over two hours by public transportation in middle-aged women were 39.6 per cent, 40.4 per cent, and 36.8 per cent, respectively. Those of middle-aged men were 42.5 per cent, 44.7 per cent, and 40.9 per cent, respectively. Based on the 'within one hour's distance' criterion, one can argue that the structural solidarity both of middle-aged women and men in terms of the geographical proximity is not strong.

Meanwhile, almost all (98.2 per cent) of older people had at least one adult child. One of the biggest rates is 24.5 per cent and 23.2 per cent indicating those who had three adult children and four adult children, respectively. Only 72 older people did not have any adult children. On average, older people have three adult children. There was no noticeable gender difference in the geographical proximity to adult children. Unlike middle-aged people, all rates of living within one hour's distance by public transportation both of older women and men were bigger than those over two hours' distance by public transportation among all three adult children. In other words, the proportions of the first, second, and third adult child's geographical proximity within one hour's distance by public transportation to older women were 41.7 per cent, 42.8 per cent, and 40.4 per cent, respectively. Similarly, those of older men were 43.2 per cent, 45 per cent, and 42 per cent, respectively. In contrast, the rates for the first, second, and third adult child's geographical proximity over two hours by public transportation to older women were 37.4 per cent, 36.5 per cent, and 37.7 per cent, respectively. Those of older men were 37.4 per cent, 34.9 per cent, and 38.5 per cent, respectively. Based on the 'within one hour's

distance' criterion, it is estimated that the structural solidarity both of older women and men in terms of the geographical proximity is not strong.

Table 6.5 Structural Solidarity in Later Life by Gender

Number of Live Adult Children		Middle-aged People				Older People			
		F		%		F		%	
0		150		3.2		72		1.8	
1		415		8.9		192		4.8	
2		2,420		52.1		538		13.3	
3		1,198		25.8		988		24.5	
4		336		7.2		939		23.2	
5		102		2.2		695		17.2	
6+		27		0.6		616		15.2	
Total		4,648		100		4,040		100	
Geographical Proximity to Adult Children by Public Transport		FMAP		MMAP		FOP		MOP	
		F	%	F	%	F	%	F	%
1 st Child	Within 30 minutes	295	18.8	180	16.9	337	17.6	280	19
	Within 1 hour	337	21.5	215	20.2	461	24.1	358	24.2
	Within 2 hours	313	20	218	20.5	400	20.9	286	19.4
	More than 2 hours	620	39.6	453	42.5	715	37.4	553	37.4
	Total	1,565	100	1,066	100	1,913	100	1,477	100
2 nd Child	Within 30 minutes	260	19.3	139	16.2	335	17.3	301	21.1
	Within 1 hour	266	19.8	149	17.4	493	25.5	341	23.9
	Within 2 hours	275	20.4	185	21.6	400	20.7	285	20
	More than 2 hours	544	40.4	383	44.7	707	36.5	497	34.9
	Total	1,345	100	856	100	1,935	100	1,424	100
3 rd Child	Within 30 minutes	122	18	53	14.8	294	17.2	201	16.7
	Within 1 hour	159	23.5	81	22.7	397	23.2	305	25.3
	Within 2 hours	147	21.7	77	21.6	378	22.1	236	19.6
	More than 2 hours	249	36.8	146	40.9	645	37.6	464	38.5
	Total	677	100	357	100	1,714	100	1,206	100

Note: F (Frequency), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

6.4.2. Associational Solidarity in Later Life

Table 6.6 illustrates the associational solidarity in later life by gender in terms both of the frequency of face-to-face meetings and contact via other communication channels.

Regarding the frequency of face-to-face meetings, there was no noticeable gender difference among middle-aged people. In other words, the rates of the most frequent meeting, i.e. at least once a month, of middle-aged women and men were similar: fewer than 50 per cent with every adult child. Based on a criterion of 'at least once a month', this reflects that associational solidarity both of middle-aged women and men in terms of the frequency of face-to-face meetings is not strong.

Similarly, there was no remarkable gender difference in the frequency of contact through other communication channels either. It should be noted that over 90 per cent both of middle-aged women and men contacted all their children by using other communication channels rather than by meeting face-to-face, which recorded less than 50 per cent. This means that contacting via other communication channels plays a key role in associational solidarity between both middle-aged women and men, and their adult children. Furthermore, based on the criterion of 'at least once a month', it also implies that the associational solidarity of both middle-aged women and men in terms of the frequency of contact via other communication channels is very strong.

There was no prominent gender difference in the face-to-face meetings of older people. The rates of the frequency of meeting both of older women and men with the first adult child at least once a month were about 48 per cent and 39 per cent, respectively. Those with the second adult child were about 32 per cent and 39 per cent, respectively. When it comes to meeting with the third adult child, almost the same proportion of older women met their third adult child at least once a month (31.6 per cent) or once every

three or four months (31.9 per cent). More older men met their third adult child at least once a month (35.6 per cent) than once every three or four months (30.2 per cent). Based on the criterion of 'at least once a month', this reflects that the associational solidarity of older women and men in terms of the frequency of face-to-face meetings is not strong.

There was no noticeable gender difference among older people in contact through other communication channels either. The rates of frequency of contact of both older women and men with the first adult child via other communication channels at least once a month were about 85 per cent and 88 per cent, respectively. Similarly, the proportions of the frequency of contact of older women and men with the second adult child via phone or (e)mail at least once a month were about 74 per cent and 88 per cent, respectively. With the third adult child the figures were around 85 per cent and 88 per cent, respectively. Generally, the greater proportion (over 85 per cent) of contact of both older women and men with adult children via other communication channels rather than face-to-face meetings implies that contact through other communication channels plays a key role in associational solidarity between older people and their adult children. Moreover, based on the criterion of 'at least once a month', it also reflects that the associational solidarity both of older women and men in terms of the frequency of contact via other communication channels is very strong.

Table 6.6 Associational Solidarity in Later Life by Gender

Frequency of Face-to-Face Meeting		Aged 45-64				Aged 65+			
		FMAP		MMAP		FOP		MOP	
		F	%	F	%	F	%	F	%
1 st Child	At least once / 1 Month	764	48.9	507	47.8	631	47.4	567	38.7
	Once / 2 Months	204	13.1	149	14	259	13.6	209	14.2
	Once / 3-4 Months	365	23.4	243	22.9	580	30.4	413	28.2
	Once / 12 Months	160	10.3	119	11.2	317	16.6	202	13.8
	Almost never and never / Year	66	4.2	44	4.1	121	6.3	76	5.2
	Total	1,559	100	1,062	100	1,908	100	1,467	100
2 nd Child	At least once / 1 Month	619	46	392	45.8	612	31.6	545	38.4
	Once / 2 Months	195	14.5	107	12.5	269	13.9	189	13.3
	Once / 3-4 Months	309	23	221	25.8	576	29.8	365	25.6
	Once / 12 Months	159	11.8	95	11.1	354	18.3	239	16.8
	Almost never and never / Year	63	4.7	41	4.8	124	6.4	86	6
	Total	1,345	100	856	100	1,935	100	1,424	100
3 rd Child	At least once / 1 Month	286	42.2	154	43.2	542	31.6	429	35.6
	Once / 2 Months	124	18.3	50	14	235	13.7	164	13.6
	Once / 3-4 Months	167	24.7	97	27.2	546	31.9	364	30.2
	Once / 12 Months	81	12	48	13.4	292	17	182	15.1
	Almost never and never / Year	19	2.8	8	2.3	99	5.7	67	5.6
	Total	677	100	357	100	1,714	100	1,206	100

Note: F (Frequency), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

Table 6.6 Associational Solidarity in Later Life by Gender (continued)

Frequency of Contact by Telephone or (e)Mail		FMAP		MMAP		FOP		MOP	
		F	%	F	%	F	%	F	%
1 st Child	At least once / 1 Month	1,472	94.4	974	91.8	1,628	85.3	1,298	88.4
	Once / 2 Months	17	1.1	19	1.8	64	3.4	40	2.7
	Once / 3-4 Months	22	1.4	26	2.5	79	4.1	43	2.9
	Once / 12 Months	23	1.5	22	2.1	75	3.9	49	3.3
	Almost never and never / Year	26	1.7	20	1.8	65	3.4	39	2.7
	Total	1,560	100	1,061	100	1,910	100	1,469	100
2 nd Child	At least once / 1 Month	1,247	92.7	788	92.2	1,631	74.2	1,254	88
	Once / 2 Months	30	2.2	24	2.8	67	3.5	40	2.8
	Once / 3-4 Months	25	1.9	16	1.9	95	4.9	45	3.2
	Once / 12 Months	18	1.3	9	1.1	71	3.7	40	2.8
	Almost never and never / Year	25	1.9	19	2.3	72	3.7	45	3.2
	Total	1,345	100	856	100	1,935	100	1,424	100
3 rd Child	At least once / 1 Month	633	93.5	329	92.1	1,458	85.1	1,057	87.6
	Once / 2 Months	15	2.2	9	2.5	61	3.6	38	3.2
	Once / 3-4 Months	8	1.2	8	2.2	91	5.3	47	3.9
	Once / 12 Months	12	1.8	7	2.0	58	3.4	37	3.1
	Almost never and never / Year	9	1.3	4	1.1	46	2.7	27	2.3
	Total	677	100	357	100	1,714	100	1,206	100

Note: F (Frequency), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

6.4.3. Functional Solidarity in Later Life

6.4.3.1. Financial Functional Solidarity in Later Life

Table 6.7 summarizes financial functional solidarity in later life by gender. Generally, more middle-aged parents supplied financial aid to their adult children than adult children did to them. There was a gender difference when middle-aged parents provided financial support to their adult children. For example, about 15 per cent more middle-aged men (57.4 per cent) provided money than middle-aged women (43.7 per cent), either regularly or irregularly over one year. This gender difference continued when middle-aged parents received financial support from their adult children, either regularly or irregularly over a year. However, it should be noted that the direction of exchange changed to the opposite. In other words, almost twice as many middle-aged women (1,021 persons) received financial support than middle-aged men (566 persons).

Moreover, among those who received financial support from their adult children, the total amount of money provided to the majority of both middle-aged women (72 per cent) and middle-aged men (77.6 per cent) by their adult children over one year was less than 1,000,000 won. The rates of middle-aged women and men who received over 1,000,000 won but less than 4,000,000 won were similar. However, there was a gender difference when it came to receiving financial support of more than 4,000,000 won. In other words, twice as many middle-aged women (6.7 per cent) received over 4,000,000 won than middle-aged men (3.2 per cent). The fact that at least 70 per cent of both middle-aged women and men received just less than 1,000,000 won from adult children implies that, among those who received financial support from their adult children, the functional solidarity of both middle-aged women and men in terms of receiving financial

support is weak.

However, one can detect a different picture in figure 6.2. The figure illustrates that, among those who received financial support from their adult children, the mean of the total amount of money received from adult children both of middle-aged women and men increases with ageing. This means that, among those who received financial support from their adult children, the strength of the functional solidarity both of middle-aged women and men with their adult children in terms of receiving financial support increases as they get older.

However, the basic shape of the financial functional solidarity of older people is the opposite of that of middle-aged people. In other words, far more adult children provided financial aid to their older parents than older parents did to them, either regularly or irregularly over a year. For example, over three times more female (74.3 per cent) and male (75.5 per cent) adult children supplied money than older women (20.2 per cent) and older men (23.9 per cent). However, there was no noticeable gender difference when they exchanged financial support.

In addition, among those who received financial support from their adult children, the total amount of money provided to the majority of older women (51.4 per cent) and older men (59.7 per cent) by their adult children for one year was less than 1,000,000 won. The proportion of older women (35.9 per cent) who received more than 1,000,000 won and less than 4,000,000 won was larger than that of older men (30.6 per cent). Similarly, more older women (12.7 per cent) received financial support of more than 4,000,000 won than older men (9.7 per cent). The fact that at least 50 per cent of both older women and men received less than 1,000,000 won from adult children implies that, among those who received financial support from their adult children, the functional solidarity both of older women and men in terms of receiving financial support is weak.

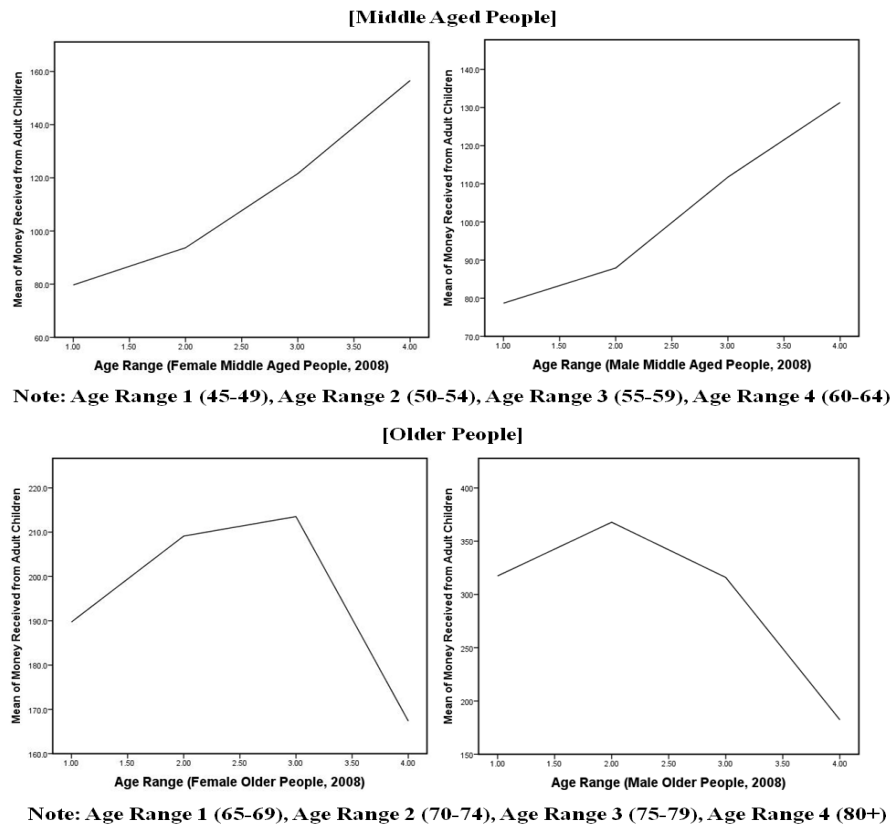
Figure 6.2 also illustrates the changes both in older women's and men's mean of the total amount of money received from adult children as they became older. It increased before 75 years but decreased after that in older women. However, it increased before 70 years but decreased after 70 in older men. This implies that, among those who received financial support from their adult children, the strength of the functional solidarity of older women in terms of receiving financial support decreases as they age after 75 years but that of older men decreases as they get old after reaching 70 years old.

Table 6.7 Financial Functional Solidarity in Later Life by Gender

Financial Support Provided to Adult Children either Regularly or Irregularly	FMAP (N=2,565)		MMAP (N=2,083)		FOP (N=2,356)		MOP (N=1,684)	
	F	%	F	%	F	%	F	%
Yes	1,122	43.7	1,198	57.4	476	20.2	402	23.9
No	1,443	56.3	888	42.6	1,880	79.8	1,282	76.1
Financial Support Received from Adult Children either Regularly or Irregularly	FMAP (N=2,565)		MMAP (N=2,083)		FOP (N=2,356)		MOP (N=1,684)	
	F	%	F	%	F	%	F	%
Yes	1,021	39.8	566	27.2	1,750	74.3	1,272	75.5
No	1,544	60.2	1,517	72.8	606	25.7	412	24.5
Total Amount of Money Received from Adult Children	FMAP (N=1,021)		MMAP (N=566)		FOP (N=1,750)		MOP (N=1,272)	
	F	%	F	%	F	%	F	%
0-1,000,000 won	735	72	439	77.6	899	51.4	759	59.7
1,000,001-2,000,000 won	117	11.5	59	10.4	337	19.3	205	16.1
2,000,001-3,000,000 won	58	5.7	32	5.7	189	10.8	107	8.4
3,000,001-4,000,000 won	43	4.2	18	3.2	102	5.8	77	6.1
Over 4,000,000 won	68	6.7	18	3.2	223	12.7	124	9.7

Note: F (Frequency), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), One pound (GBP) was worth around 2,050 won in 2008.

Figure 6.2 Change in Mean of Total Amount of Money Received from Adult Children by Gender and Age Group



6.4.3.2. Non-financial Functional Solidarity in Later Life

Figure 6.3 illustrates non-financial functional solidarity in later life by gender. Regarding middle-aged people, our data show six different dimensions including travel provision, health-care supplies, household items, electrical goods, food, and caring for grandchildren. Among them, transfer of food, household items, and health-care supplies play a major role in mutual exchange. Interestingly, both middle-aged women and men supplied more food to their adult children but they received more from adult children in all other categories. In general, there was no gender difference in exchanging non-financial support except in caring provision for grandchildren.

For example, exchanging travel provision is not common, i.e. only around 2 per

cent of adult children provided travel-related help to their female and male parents. Health-care supplies were provided mainly by the adult children to their parents; and 41 per cent and 37 per cent of adult children provided them to their middle-aged women and men, respectively. Although electrical goods were not often exchanged, general household items were relatively more commonly exchanged; the volume provided by adult children was almost twice as great as that provided by both middle-aged women and men. For example, around 53 per cent and 50 per cent of adult children provided household items to their female and male middle-aged parents, respectively, while about 27 per cent and 28 per cent of female and male middle-aged people, respectively, supplied them to their adult children.

However, a much larger proportion of both middle-aged women and men compared with their adult children transferred food. Specifically, around 93 per cent of middle-aged women and 95 per cent of middle-aged men provided food for their adult children. But this does not mean that fewer adult children provided it. Approximately 74 per cent and 73 per cent of adult children gave food to their female and male middle-aged parents, respectively. Finally, there was an obvious gender difference in the provision of care for grandchildren. In other words, three times more middle-aged women than men provided care for their grandchildren. This is consistent with many previous studies reporting the gender difference in caring for grandchildren that grandmothers give more of their time in caring for grandchildren than grandfathers do (Attias-Donfut and Wolff, 2000; Harper, 2006).

When it comes to the non-financial functional solidarity of older people, the general picture is similar to that of middle-aged people in terms of the extent of active exchange. In other words, food, household items, and health-care supplies still play a key role in non-financial intergenerational exchange. Furthermore, both older women and

men also provided more food for their adult children but they received more from adult children in all other respects. Generally, there was no gender difference in exchanging non-financial support.

For instance, the proportion of adult children who provided travel help to both older women and men is bigger than that of provided to the middle-aged people but it still represented just under 3 per cent. The rates of adult children who provided health-care supplies to both older women and men were bigger than those provided to middle-aged parents, around 50 per cent and 51 per cent for female and male older parents, respectively. The general picture of exchanging electrical goods is very similar to that of the middle-aged parents. The difference in proportion of exchanging household items increased than that of middle-aged parents. In other words, the proportion of adult children who provided household items to their female and male older parents was almost five times larger than that of older parents provided to their adult children. For instance, 57.3 per cent of adult children provided household items to their older women and men while 11 per cent of older women and around 12 per cent of older men supplied them to their adult children.

However, a much bigger rate of older people than adult children supplied food. For example, almost 94 per cent of older women and 95 per cent of older men provided food for their adult children. By contrast, around 76 per cent and 77 per cent of adult children gave food to female and male older parents, respectively. When it comes to caring for grandchildren, fewer older people (fewer than 4 per cent) provided care for their grandchildren. Although it is widely accepted that older generations' provision of care for grandchildren is prevalent (Albertini, Kohli, and Vogel, 2007), our result shows that the South Korean case is not consistent with that.

Figure 6.3 Non-Financial Functional Solidarity in Later Life by Gender

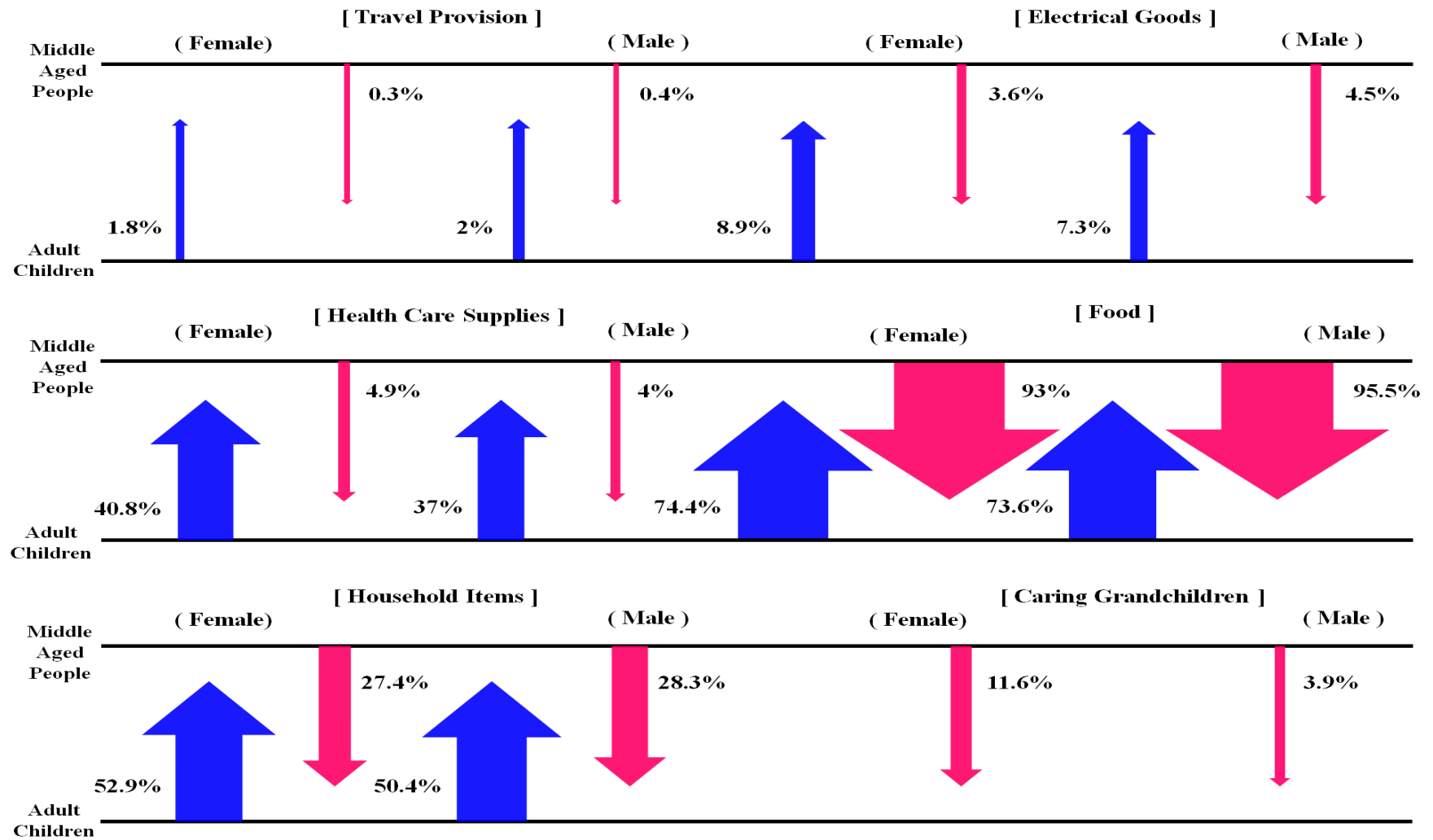
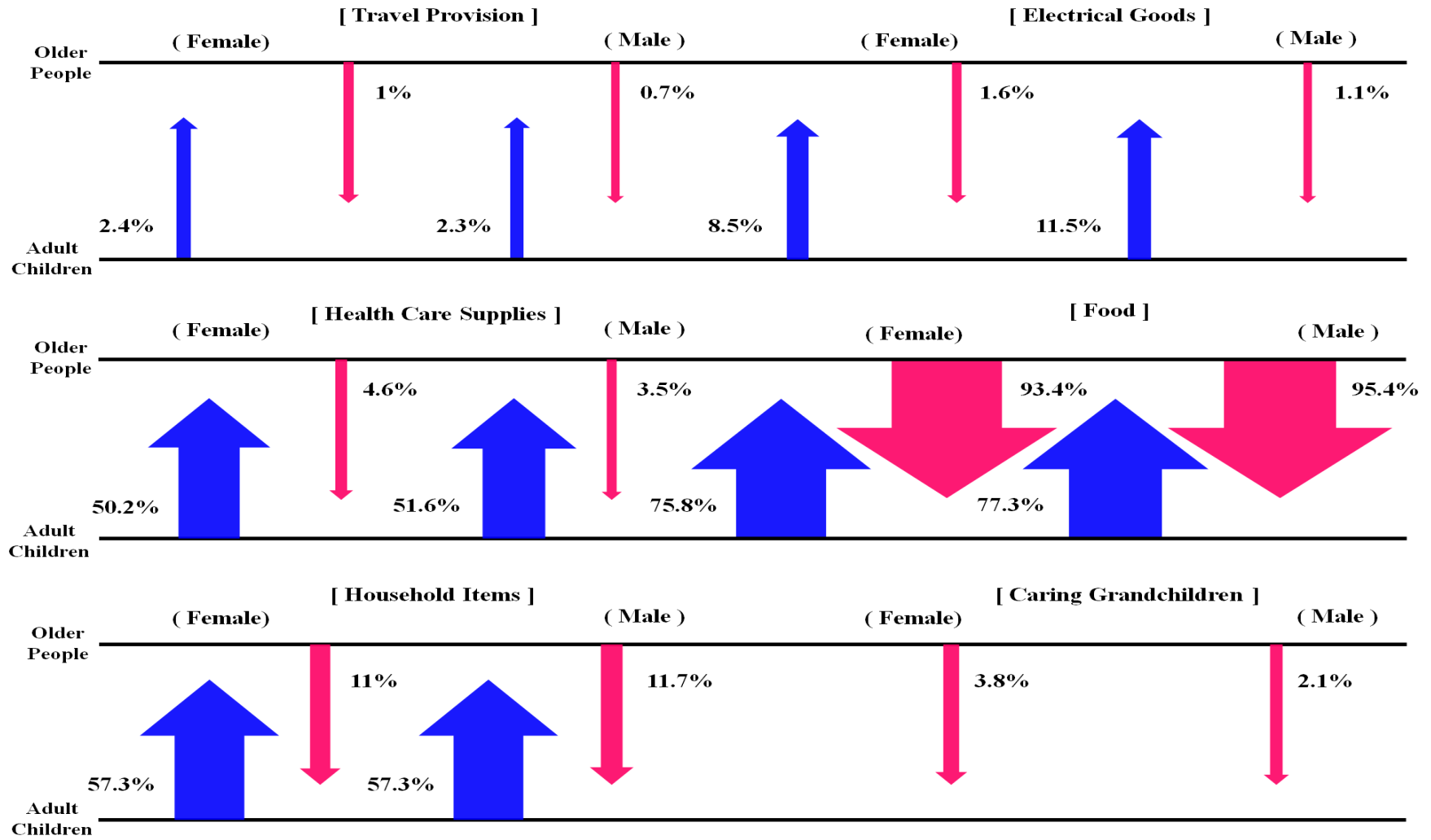


Figure 6.3 Non-Financial Functional Solidarity in Later Life by Gender (continued)



6.4.4. Relationship between Socio-Demographic and Economic Status, and Intergenerational Solidarity in Later Life

Table 6.8 summarizes the result of the cross-tabulation analysis between socio-demographic and economic status and intergenerational solidarity in later life by gender. Broadly, it shows that practising the intergenerational solidarity in later life varies according to socio-demographic and economic status. Both associational solidarity and functional solidarity show a meaningful relationship with socio-demographic and economic status but structural solidarity does not show it.

More specifically, associational solidarity is related to age of both middle-aged and older people and there is no noticeable gender difference. For example, middle-aged women and men who are aged 55-64 not only meet but also contact their adult children more frequently than younger middle-aged women and men who are aged 45-54. However, the picture is turned up-side down in the older people group. In other words, younger female and male older people who are aged under 75 meet and contact their adult children more frequently than older women and men who are aged 75 and over.

The functional solidarity of middle-aged and older people is related to their age, employment, and income. Almost all middle-aged and older people received and provided non-financial support regardless of their age. The vast majority of both older women and men received financial support from their adult children while fewer than 30 per cent of them provided financial support to their adult children. In contrast, fewer than 40 per cent of both middle-aged women and men received financial support from their adult children whereas over 90 per cent of these groups provided financial support for their adult children. Moreover, the rate of younger middle-aged (45-54 years) and younger older people (65-74 years) who received financial support is lower than that of

older middle-aged (55-64 years) and old older people (aged 75 and over).

Fewer than 30 per cent of both middle-aged women and men received financial support from their adult children even if they were not employed. However, over 90 per cent of both middle-aged women and men received non-financial support from their adult children and in turn provided financial and non-financial support to their adult children regardless of their employment condition. Over 90 per cent of both older women and men received financial and non-financial support from their adult children as well as providing non-financial support for their adult children regardless of their employment condition. However, fewer than 30 per cent of both older women and men provided financial support to their adult children and the employed provided somewhat more than the non-employed.

The vast majority of both middle-aged and older people received non-financial support from their adult children and provided non-financial support regardless of their income condition. However, more middle-aged women and men who are in the lowest range of income (10,000,000 won and less) received financial support from their adult children than those in the highest range of income (over 40,000,000 won). By contrast, higher rate of both middle-aged women and men provided financial support to their adult children. A much higher rate of both middle-aged women and men who are in the highest income range (over 40,000,000 won) provided financial support than those in the lowest range of income (10,000,000 won and less). Over 90 per cent of older people received financial support from their adult children regardless of their income whilst fewer than 20 per cent of older people provided financial support. Almost three times more of older women and men who are in the highest range of income (over 40,000,000 won) provided financial support for their adult children than those in the lowest range of income (10,000,000 won and less than).

Table 6.8 Relationship between the Socio-Demographic and Economic Status, and Intergenerational Solidarity in Later Life by Gender

Associational Solidarity			Meeting (at least once a month)			Contacting (at least once a month)		
			1 st Child	2 nd Child	3 rd Child	1 st Child	2 nd Child	3 rd Child
Age	FMAP	45-54	47.2	42.6	37	90.5	90.3	90.9
		55-64	50.1	47.8	43.5	94.8	94.9	93.9
	MMAP	45-54	39.4	37	38.1	90.3	88.4	90.5
		55-64	51.2	48.8	43.8	93	93.3	93.4
	FOP	65-74	35.5	35.2	33.1	88.4	88.2	87.9
		75+	28.9	26.1	29.5	79.8	78.2	80.9
	MOP	65-74	41.7	42.2	39.7	90.3	90.7	90.5
		75+	32.5	31	29.1	84.6	85.1	83.2
Functional Solidarity			Financial Support (Received)	Non-financial Support (Received)	Financial Support (Provided)	Non-financial Support (Provided)		
Age	FMAP	45-54	27.4	95.6	91.1	89.1		
		55-64	39.6	91.5	92.4	90.2		
	MMAP	45-54	29.1	97.6	94.1	90.6		
		55-64	36.1	92.2	90.6	93.7		
	FOP	65-74	89.5	95.5	27.1	96.9		
		75+	97.7	94.1	19.2	95.3		
	MOP	65-74	85.3	94.5	29.8	93.2		
		75+	96.3	94.2	16.3	92.9		
Employment	FMAP	No	29.5	94.1	90.3	93.1		
		Yes	27.8	92.9	91.5	95.6		
	MMAP	No	28.3	94.4	87.6	90.7		
		Yes	22.5	94.8	91.7	92.1		
	FOP	No	92.1	95.1	22.2	94.1		
		Yes	90.2	94	27.5	95.8		
	MOP	No	93.2	94.7	23.4	92.6		
		Yes	91.3	93.8	26.1	93.2		
Income (Million won)	FMAP	0-10	28.5	91	31.3	94.1		
		Over 40	23.5	94.5	50.2	95.7		
	MMAP	0-10	25.1	93.5	32.3	91.7		
		Over 40	21.8	94.6	59.4	93.2		
	FOP	0-10	92.3	95.8	6.7	90.2		
		Over 40	91.4	94.9	18.8	92.8		
	MOP	0-10	95.3	94.7	4.4	93.8		
		Over 40	93.3	95.2	10.3	93.9		

Note: Unit (%), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

6.4.5. Relationship between Health Condition and Intergenerational Solidarity in Later Life

The analysis of the cross-tabulation between the health condition and intergenerational solidarity in later life by gender is summarized in the table 6.9. The relationship is distinguishable between health condition, namely physical and mental health, and only the associational solidarity. For example, both middle-aged and older people who have better physical health condition in terms of ADL and IADL are more likely to meet their adult children at least once a month. However, middle-aged and older people who have worse physical health condition in terms of ADL and IADL are more likely to contact their adult children via other communication channels. Relating with mental health condition, the more middle-aged and older people experience stronger depression condition, the more likely to meet and contact with their adult children. This reflects that both physical and mental health condition in later life are very important for performing intergenerational solidarity, mainly the associational solidarity.

Table 6.9 Relationship between the Health Condition and Intergenerational Solidarity in Later Life by Gender

Health Condition			Physical Health				Mental Health	
			ADL		IADL		Depression	
			1	3	1	3	1	4
Associational Solidarity (at least once a month)	Meeting with 1 st Child	FMAP	44	20.9	50.1	19.4	12.1	33.3
		MMAP	42.1	19.4	45.2	16.2	11.9	35.2
		FOP	50	11.9	45.7	17.1	11.1	39.5
		MOP	40.1	22	41.2	22.7	16.5	37.2
	Contacting with 1 st Child	FMAP	14.4	50.4	12.8	55.1	6.1	43.3
		MMAP	13.2	55.1	10	54.9	4.3	45.2
		FOP	18.2	50.7	15.8	52.2	4.1	42.5
		MOP	10.5	52.2	12.2	56.1	7.5	40.2

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), Full information is given in appendix

5.

6.4.6. Relationship among Intergenerational Solidarities in Later Life

The table 6.10 summarizes the cross-tabulation analysis among intergenerational solidarities in later life by gender. The structural solidarity in terms of the geographical proximity is related with the associational solidarity and there is no noticeable gender difference. For example, middle-aged and older people who live closer with their adult children are more likely to meet each other than those who live farther away. In contrast, middle-aged and older people who live farther away from their adult children are more likely to contact with their adult children through other communication channels. This implies that performing associational solidarity is significantly affected by the structural solidarity, i.e. the frequency of meeting increases with decreasing the geographical distance whilst the frequency of contacting by other communication channels increases with increasing the geographical distance (Hank, 2007; Gabriel and Bowling, 2004; Smith, 1998; Parsons, 1943).

Similarly, the structural solidarity in terms of the number of adult children is related with the functional solidarity in terms of receiving both financial and non-financial support from adult children and there is no noticeable gender difference. In other words, both middle-aged and older people who have more adult children are more likely to receive financial support as well as non-financial support than those who have fewer adult children. This might be because the possibility for providing financial and non-financial support for older parents increases as there are more adult children.

This result is consistent with previous studies. For example, Cheung and Kwan (2009) surveyed 1,130 people aged 40 and over living in China and found that older

parents who have more adult children received more financial support from them. Spitze and Logan (1990) analyzed the 8,516 older people aged 65 and over sampled from the Supplement on Aging to the National Health Interview Survey. They also found that older people who have more children were given more support by their children. Similarly, Sutor and Pillemer (1996) , Eggebeen and Hogan (1990a, 1990b), and Mancini and Blieszner (1989) also found that older people who have more adult children have a higher possibility of receiving financial functional solidarity from their adult children since adult children who have siblings can divide the burden of supporting older parents by negotiating the caring responsibility.

Table 6.10 Relationship among Intergenerational Solidarities in Later Life by Gender

Associational Solidarity (at least once a month)				Meeting (1 st Child)		Contacting (1 st Child)	
Structural Solidarity	Geographical Proximity	FMAP	Within 30 minutes	93.2	73.1		
			Over two hours	21.1	89.3		
		MMAP	Within 30 minutes	90.1	75.3		
			Over two hours	19.7	84.3		
		FOP	Within 30 minutes	79.5	76		
			Over two hours	7.3	92.9		
		MOP	Within 30 minutes	82.1	80.3		
			Over two hours	12.2	92.4		
Functional Solidarity				Amount of Money (Received, won)		Non-financial Support (Received)	
				0-1,000,000	Over 4,000,000	Yes	
Structural Solidarity	Number of Adult Children	FMAP	1	45.3	8.2	51.5	
			3+	55.4	15.4	66.1	
		MMAP	1	49.1	7.8	48.3	
			3+	53.2	12.4	61.2	
		FOP	1	58.7	7.9	72.1	
			3+	73.7	14.4	83.2	
		MOP	1	60.3	7.7	77.3	
			3+	74.7	12.3	88.2	

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), Full information is given in appendix

6.

6.5. Public Pension Systems for Later Life

Due to the almost all of middle-aged people at KLoSA did not start receiving the National Pension Scheme benefit yet which means almost all of middle-aged people were not applicable to be analysed, the thesis focuses on only older people for the National Pension Scheme benefit. Similarly, middle-aged people are not qualified to apply for the Basic Old-Age Pension benefit, either. Consequently, the table 6.11 illustrates both the National Pension Scheme and Basic Old-Age Pension only for older people by gender.²¹

It should be noted that there was an obvious gender difference in receipt of the National Pension Scheme benefit. In other words, over twice as many older men (27.4 per cent) received the National Pension Scheme benefit than older women (10 per cent). This is mainly because more of older men participated in the labour market than older women when they were working age since the conventional ‘male bread-winner model’ was very strong among the older generation in South Korea. Furthermore, the absolutely small number of older men who received the National Pension Scheme benefit is not surprising because the majority of this generation did not register for the National Pension Scheme when it was at the emerging stage.

Moreover, there was a clear gender difference in receiving the Basic Old-Age Pension benefit. For example, over 10 per cent more older women (43.3 per cent) received the Basic Old-Age Pension than male older men (32 per cent). On the one hand this is not surprising because a means-tested welfare programme primarily targets those

²¹ As discussed in chapter 4, the National Pension Scheme benefit is available for those aged 60 and over while the Basic Old-Age Pension benefit is available only for those aged 65 and over. Therefore, in this thesis, when referring to the National Pension Scheme, the older people group indicates those who aged 60 and over, whereas applies for Basic Old-Age Pension older people category means those who aged 65 and over.

who are in need of the benefit. In other words, older women have much greater possibility of receiving means tested welfare benefits than older men due to the bi-polarized old-age poverty (Arber et al., 2003; Stahlberg, Kruse, and Sunden, 2005). For example, in South Korea, much larger proportion of older women are economically deprived than older men: older women are more severely deprived than older men. For example, the proportion of older women (34.8 per cent) who received the National Basic Livelihood Security benefit was almost twice that of older men (17.6 per cent) in 2011 (MOHW, 2012g). This probably increased the possibility of older women's being selected as the recipient of the Basic Old-Age Pension benefit than that of older men.

Table 6.11 National Pension Scheme and Basic Old-Age Pension Receipt in Later Life

	Receiving National Pension Scheme Benefit				Receiving Basic Old-Age Pension Benefit			
	Older Women		Older Men		Older Women		Older Men	
	Frequency	%	Frequency	%	Frequency	%	Frequency	%
Yes	297	10	614	27.4	1,019	43.3	539	32
No	2,676	90	1,628	72.6	1,337	56.7	1,145	68
Total	2,973	100	2,242	100	2,356	100	1,684	100

6.6. Happiness in Later Life

6.6.1. Happiness in Later Life by Gender

Table 6.12 summarizes happiness in later life by gender. Regarding middle-aged people, the mean of happiness of middle-aged women and men was about 63 and 64, respectively. The majority of middle-aged women (85.6 per cent) and middle-aged men (88.1 per cent) responded that their degree of happiness was at least 50 and over. Only 14 middle-aged women and 12 middle-aged men answered that they were totally unhappy, respectively.

The same number of middle-aged women and men responded that they were absolutely happy. This result is not consistent with the previous studies reporting that women aged 45 and over reported significantly lower level of happiness than men by analyzing the World Values Survey (Inglehart, 2002).

Regarding older people, the mean of happiness of older women and men was about 55 and 59, respectively. A bigger proportion of older men (79.1 per cent) responded that their degree of happiness was at least 50 and over than older women (72.7 per cent). Only 26 older women and 10 older men answered that they were completely unhappy. Additionally, only 25 older women and 14 older men responded that they were completely happy.

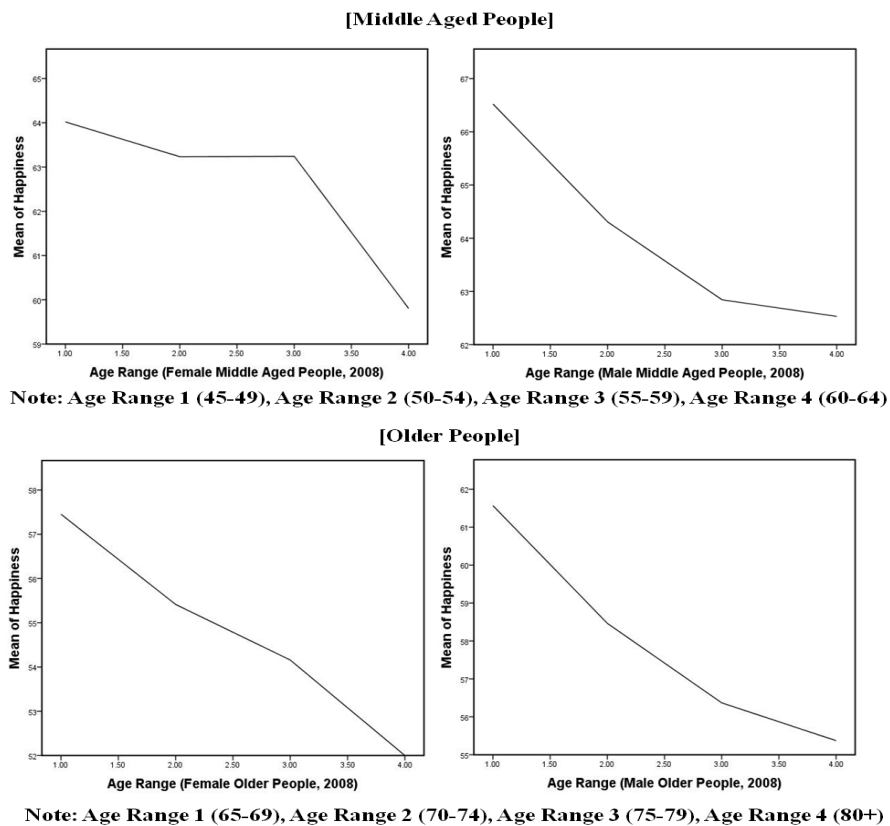
However, figure 6.4 tells a different story. In other words, it shows that the mean of happiness both of middle-aged women and men decreases as they get older. Furthermore, the degree of change is relatively different in each group. For example, it slowly decreased before 60 years but it decreased steeply after 60 years in middle-aged women. By contrast, it plummeted before 69 years but it slowly decreased after 60 years in middle-aged men. This implies that the intensity of happiness both of middle-aged women and men, in general, decreases as they get older and it decreases sharply after 60 years in middle-aged women but it does so before 60 years in middle-aged men. Unlike in the middle-aged group, it decreases consistently in all age groups both of older women and men.

Table 6.12 Degree of Happiness in Later Life by Gender

	FMAP (N=2,565)		MMAP (N=2,083)		FOP (N=2,356)		MOP (N=1,684)	
	Frequency	%	Frequency	%	Frequency	%	Frequency	%
0	14	0.5	12	0.6	26	1.1	10	0.6
10	13	0.5	17	0.8	60	2.5	27	1.6
20	43	1.7	50	2.4	99	4.2	57	3.4
30	148	5.8	86	4.1	205	8.7	120	7.1
40	149	5.8	93	4.5	252	10.7	138	8.2
50	498	19.4	343	16.5	537	22.8	335	19.9
60	390	15.2	334	16	331	14	279	16.6
70	620	24.2	524	25.2	459	19.5	370	22
80	504	19.6	448	21.5	293	12.4	263	15.6
90	152	5.9	142	6.8	69	2.9	71	4.2
100	34	1.3	34	1.6	25	1.1	14	0.8
Mean/SD	62.57/18.02		64.02/18.27		55.09/20.08		58.64/19.14	

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People)

Figure 6.4 Change in Mean of Happiness in Later Life by Gender and Age Group



6.6.2. Relationship among Socio-Demographic and Economic Status, and Happiness in Later Life

Table 6.13 summarizes the cross-tabulation analysis among socio-demographic and economic status, and happiness in later life by gender. It shows that happiness in later life varies according to their socio-demographic and economic status.

With regard to socio-demographic status, age is significantly related to the happiness both of middle-aged and older people. In other words, younger middle-aged people aged 45-54 are happier than older middle-aged people aged 55-64 and younger older people aged less than 75 are happier than old older people aged 75 and over. Moreover, marital status is related to the happiness of both middle-aged and older people and there is a gender difference between older women and older men. In other words, both married middle-aged women and men are more likely to report higher levels of happiness than unmarried middle-aged women and men. However, this applies to only older men, not to older women. Religiosity is also related to the happiness of both middle-aged and older people but there is a gender difference in both groups. In other words, both religious middle-aged and older women are more likely to report better happiness than irreligious middle-aged and older women. However, this is not the case for middle-aged and older men.

When it comes to the socio-economic status, the amount of income is related to the happiness of only middle-aged people. In other words, both middle-aged women and men who have more income are more likely to report a better degree of happiness than those who have less income. Moreover, ownership of a house and a vehicle is related to the happiness of both middle-aged and older people, i.e. middle-aged and older people who have a house and a vehicle are more likely to report higher levels of happiness than

those who do not have these.

Table 6.13 Relationship between Socio-Demographic and Economic Status, and Happiness in Later Life by Gender

Socio-Demographic Status			Happiness		Socio-Economic Status			Happiness	
			0	100				0	100
Age	FMAP	45-54	6.1	32.7	Income (Million won)	FMAP	0-10	30.1	5.4
		55-64	31.8	4.2			Over 40	9.5	29.7
	MMAP	45-54	9.1	33.6		MMAP	0-10	29.8	3
		55-64	39.1	3.2			Over 40	4.6	30.1
	FOP	65-74	2.6	36.9		FOP	0-10	27.8	15.7
		75+	30.2	5.7			Over 40	29.6	15.8
	MOP	65-74	8.4	30.2		MOP	0-10	30.1	9.6
		75+	33.5	5.4			Over 40	28.9	8.8
Marriage	FMAP	No	38.2	9.8	House	FMAP	No	33.1	6.5
		Yes	3.4	33.2			Yes	7.6	40.5
	MMAP	No	42.3	7.7		MMAP	No	37.1	7.1
		Yes	6.1	30.1			Yes	4.6	30.1
	FOP	No	29.5	29.3		FOP	No	33.7	1
		Yes	29.2	30.7			Yes	4.6	34.4
	MOP	No	42.1	3.7		MOP	No	29.8	4
		Yes	8.4	29.8			Yes	5.9	30.4
Religion	FMAP	No	30.1	8.8	Vehicle	FMAP	No	30	6.5
		Yes	4.1	33.9			Yes	1.4	44.5
	MMAP	No	33.1	20.4		MMAP	No	33.9	9.4
		Yes	32.3	20.8			Yes	12.4	33.3
	FOP	No	37.2	4.6		FOP	No	29.7	3
		Yes	5.9	29.9			Yes	2.3	33.5
	MOP	No	30.2	10.9		MOP	No	30.2	7.8
		Yes	31	9.8			Yes	9.3	37.2

Note: Unit (%), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

6.6.3. Relationship between Health Condition and Happiness in Later Life

Table 6.14 summarizes the relationship between health condition and happiness in later life by gender. The evidence on the relationship between health condition and happiness of both middle-aged and older people is compelling and there is no noticeable gender

difference. In other words, both middle-aged and older people who are in better physical health condition in terms of both ADL and IADL are happier than those who are in a poor physical condition. Similarly, middle-aged and older people who have higher level of depression are unhappier than those who have a lower degree of depression. Furthermore, both middle-aged and older people who reported a better subjective health status are happier than those reported a lower degree of subjective health condition. This suggests that both physical and mental health conditions are vitally important for happiness in later life.

Table 6.14 Relationship between Health Condition and Happiness in Later Life by Gender

Health Condition			Happiness		
			0	100	
ADL	Aged 45 - 64	FMAP	1	6.2	30.4
			3	35.2	9.8
		MMAP	1	10.1	31.3
			3	34.1	4.5
	Aged 65+	FOP	1	5.3	30
			3	40.1	2.5
		MOP	1	10	30.1
			3	39.2	5.9
IADL	Aged 45 - 64	FMAP	1	7.4	30.2
			3	33.1	5.3
		MMAP	1	12.6	29.5
			3	33.4	9.9
	Aged 65+	FOP	1	6	31.2
			3	30.1	9.9
		MOP	1	8.1	30
			3	30.2	7.9
Depression	Aged 45 - 64	FMAP	1	9.7	33.3
			4	40	4.5
		MMAP	1	8.5	32.6
			4	38.2	5.3
	Aged 65+	FOP	1	3.6	33.2
			4	43.1	6.2
		MOP	1	5.1	32.1
			4	44	8.7
Subjective	Aged	FMAP	0	30	17.1

Health	45 - 64		100	19.1	40
		MMAP	0	31.1	18.9
		100	17.9	42.1	
	Aged 65+	FOP	0	35.1	20.1
			100	18.9	40.2
		MOP	0	33.1	17.1
	100	20.5	39.3		

Note: Unit (%), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

6.6.4. Relationship between Intergenerational Solidarity and Happiness in Later Life

Table 6.15 shows the relationship between intergenerational solidarities and happiness in later life by gender. The cross-tabulation analysis shows that there is a meaningful relationship between associational solidarity, structural solidarity, functional solidarity, and happiness of both middle-aged and older people, but there is no noticeable gender difference.

For example, regarding associational solidarity, the frequency of meeting and contact with adult children via other communication channels is clearly related to happiness in later life. Both middle-aged and older people who meet with and contact their adult children frequently are more likely to report a higher degree of happiness than those who have fewer meetings and less contact with them. As for structural solidarity, only the number of adult children is clearly connected to happiness in later life. In other words, both middle-aged and older people who have a greater number of adult children are more like to be happier than those who have fewer adult children. When it comes to functional solidarity, only whether they received non-financial support from adult children is related with the happiness of both middle-aged and older people, whereas whether they provided non-financial support to adult children is related with the happiness of only middle-aged people. In other words, both middle-aged and older people

who received non-financial support from adult children are more likely to report a higher degree of happiness than those who did not. In a similar way, middle-aged people who provided non-financial support to their adult children are more likely to report a higher degree of happiness than those who did not.

Table 6.15 Relationship between Intergenerational Solidarity and Happiness in Later Life by Gender

Happiness		Associational Solidarity					
		Meeting (at least once a month)			Contacting (at least once a month)		
		1 st Child	2 nd Child	3 rd Child	1 st Child	2 nd Child	3 rd Child
FMAP	0	1.4	1.8	1.4	2.2	2.5	1.4
	100	38.6	33.3	37.7	38.2	38	36.6
MMAF	0	2.4	3.3	1.3	2.4	2.5	1.5
	100	39.1	32.5	36	39.1	39.4	37.4
FOP	0	6.8	6.9	4.8	5.3	5.2	4.2
	100	36.5	35.7	37.2	34.6	34.7	34.5
MOP	0	3.9	4.2	3.7	4.1	4.1	4
	100	37.2	37.5	37.7	35.4	35.7	35.8
Happiness		Meeting (at least once a month)			Contacting (at least once a month)		
		1 st Child	2 nd Child	3 rd Child	1 st Child	2 nd Child	3 rd Child
FMAP	0	31.1	31.8	29.9	28.9	29	30.2
	100	10.1	12.3	9.9	9.8	8.9	10.2
MMAF	0	33.3	29.8	28.1	30.2	29.1	29.2
	100	11.1	10.9	9.8	9.5	10.7	11.3
FOP	0	31.4	30.2	30.1	30.3	31.4	28.3
	100	10.2	9.9	8.9	9.4	10.9	11.4
MOP	0	30.5	29.1	29.8	29.3	29.8	27.9
	100	8.8	7.9	9.1	12	13.2	9.9
						Happiness	
						0	100
Structural Solidarity (Number of Adult Children)		FMAP	Less than 3		36.9	1.9	
			3+		2.1	28.8	
		MMAF	Less than 3		35.7	2.9	
			3+		2.3	29.4	
		FOP	Less than 3		29.2	4.8	
			3+		5.5	29.1	
		MOP	Less than 3		28.9	4.2	
			3+		4.7	29.8	
Functional Solidarity		Non-financial Support (Received)		FMAP	2.3	30.1	
				MMAF	3.5	31.3	
				FOP	7.4	32.4	
				MOP	5.3	29.9	

	Non-financial Support (Given)	FMAP	2.1	35.4
		MMAP	4.1	34.9

Note: Unit (%), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

6.6.5. Relationship between Public Pension Systems and the Happiness in Later Life

The cross-tabulation analysis of the National Pension Scheme benefit, the Basic Old-Age Pension benefit, and happiness in later life by gender is summarized in the table 6.16. The result shows that both older women and men who received the National Pension Scheme benefit are more likely to report a higher level of happiness than those who did not receive the benefit. By contrast, both older women and men who received the Basic Old-Age Pension benefit are more likely to be unhappy than those who did not receive the benefit.

Table 6.16 Relationship between National Pension Scheme, Basic Old-Age Pension, and the Happiness of Older People by Gender

Happiness	National Pension Scheme Benefit		Basic Old-Age Pension Benefit	
	FOP	MOP	FOP	MOP
0	4.1	6.2	36.3	36.9
100	34.9	35.2	2.4	3.1

Note: Unit (%), FOP (Female Older People), MOP (Male Older People).

6.7. Conclusion

The purpose of this chapter was to address the first research question, namely the characteristics of intergenerational solidarity, public pension systems, and happiness in later life by gender. To this end, the chapter carried out the analysis in two ways, i.e. exploring the characteristics of them directly and identifying cross-relationships among

them. The results showed not only homogeneity but also heterogeneity between middle-aged and older people by gender.

Regarding the characteristics of socio-demographic and economic status, in the middle-aged people group there were more women than men and the vast majority of both groups were married and irreligious. In terms of socio-economic status, i.e. education, employment, income, and ownership of a vehicle, there was a gender difference. In other words, many more middle-aged men were better educated and employed than middle-aged women. Moreover, middle-aged men earned more and owned a vehicle. Regarding older people, there were more women than men and the majority were irreligious. Many of older women were bereaved than older men. The general character of the gender difference in socio-economic status including education, employment, income, and vehicle ownership was very similar to that of middle-aged people group even though there was some difference of degree in each variable.

Physical health condition was fairly good in terms of both ADL and IADL in both middle-aged and older people. Mental health condition in terms of depression was much better in middle-aged people than older people. However, there was a gender difference in both middle-aged and older people. In other words, middle-aged and older women had a higher level of depression than middle-aged and older men. The subjective health condition of both middle-aged and older people was fairly good and there was a noticeable gender difference between older women and older men in the degree of subjective health condition. Furthermore, the strength of the subjective health condition of both middle-aged and older people diminishes as they get older.

Cross-tabulation analysis revealed a negative relationship between age and physical health condition in both middle-aged and older people. In other words, younger middle-aged and older people had better ADL and IADL conditions than those more aged.

Moreover, age, marital status, religiosity, and employment were related to the depression condition and the subjective health condition. For example, the younger middle-aged and younger older people reported a lower level of depression and a better level of subjective health than older middle-aged and old older people. Married middle-aged and older people clearly showed a lower level of depression as well as a higher level of subjective health than unmarried middle-aged and older people. There was a gender difference in the relationship between religiosity and depression. Put it another way, only middle-aged and older men who were religious were more likely to report lower level of depression. The positive relationship between religiosity and subjective health condition was revealed in both middle-aged and older people, i.e. religious middle-aged and older people are more likely to report a higher level of subjective health than irreligious middle-aged and older people. The effect of employment was more influential in middle-aged people than in older people. In other words, employed middle-aged women and men showed lower levels of depression. Both middle-aged and older people who are working are more likely to report better subjective health than those who are not employed.

When it comes to structural solidarity, middle-aged people had on average two adult children whereas older people had three adult children. Structural solidarity in terms of the geographical proximity of middle-aged people to their adult children was not strong but that of older people was very strong when based on the criterion of an hour's distance from their adult children. Moreover, contact by means of other communication channels than face-to-face with adult children played a key role in associational solidarity of both middle-aged and older people. Financial functional solidarity in middle-aged and older people was not balanced in terms of exchanging financial support. In other words, middle-aged people provided more financial support for their adult children than they received from them, while older people received more financial support from their adult

children than they provided. The extent of financial functional solidarity in terms of the amount of money received from adult children was small in both middle-aged and older people. The strength of financial functional solidarity in terms of the amount of money received from adult children increased as middle-aged parents grew old, while that received by older people decreased after 75 years and older. In relation to non-financial functional solidarity, both middle-aged and older people actively exchanged food, household items, and health-care supplies. Middle-aged and older parents provided more food than their adult children did, but they received more other items from their adult children.

These manifestations of intergenerational solidarities were related not only to socio-demographic and economic status, and health condition, but also to intergenerational solidarity itself. For example, associational solidarity of both middle-aged and older people was related to their age. In other words, younger middle-aged people are more likely to meet with and contact their adult children, while younger older people were less likely to meet with and contact their adult children.

Moreover, functional solidarity of both middle-aged and older people was related to age, employment condition, and income. The vast majority of both middle-aged and older people received and provided non-financial support regardless of their age, employment, and income. Middle-aged people provided more financial support to their adult children than they received from them, whereas older people provided less financial support to their adult children than they received from them. Middle-aged and older people who were employed were less likely to receive financial support but more likely to provide it for their adult children. Similarly, both middle-aged and older people who had more income were less likely to receive financial support but more likely to provide it to their adult children.

Regarding the health condition, the results showed that poor physical health decreased the frequency of meeting with adult children in later life but that depression increased it. For example, both middle-aged and older people who had better ADL, IADL conditions and depression were more likely to meet but a worse physical health and depression increased the frequency of contacting with their adult children. In other words, both middle-aged and older people who had worse ADL, IADL, and who had depression are more likely to meet and contact with their adult children.

Structural solidarity in terms of geographical proximity is related with associational solidarity. For example, both middle-aged and older people who lived near their adult children are more likely to meet but less likely to contact them. Moreover, structural solidarity in terms of the number of adult children increased the functional solidarity. In other words, both middle-aged and older people who have a greater number of adult children are more likely to receive non-financial support as well as more money from their adult children.

There was a strong gender difference in the public pension systems. For instance, almost three times more older men than older women received the National Pension Scheme benefit. However, over 10 per cent more older women received the Basic Old-Age Pension benefit than older men. This was mainly because of the strong male breadwinner model of the labour market as well as more prevalent economic impoverishment among older women than older men, respectively.

The results generally showed that the level of happiness was very high both in middle-aged and older people but that there was a gender difference. Moreover, the strength of happiness decreased in both groups as they grew older. The happiness condition was noticeably inter-related with socio-demographic and economic status, health condition, intergenerational solidarity, and public pension receipt in both middle-

aged and older people.

For example, cross-tabulation showed that age was negatively related to the degree of happiness. The younger middle-aged and older people were more likely to report a higher level of happiness than the older middle-aged and older people. The effect of marriage was only evident for middle-aged people and older men. In other words, married middle-aged people and older men were more likely to be happier than those who were not married. There was a strong gender difference in the effect of religion. Religious middle-aged and older women were more likely to report a higher degree of happiness but there is no difference among middle-aged and older men. Middle-aged people who experienced better economic conditions were more likely to report a higher level of happiness than those who were poor, but the effect was not noticeable in the older age group. However, the effect of ownership of a house and a vehicle was compelling in both groups. In other words, middle-aged and older people who had a house or a vehicle were more likely to be happier than those who did not have these assets. This indisputable result is consistent with health condition and happiness. Middle-aged and older people who had a better physical, mental, and subjective health condition are more likely to be happier than those who did not.

Stronger associational solidarity tended to increase the degree of happiness in both middle-aged and older people. Both middle-aged and older people who met and contacted their adult children were more likely to report a higher level of happiness than those who met and contacted less. Stronger structural solidarity in terms of the number of adult children also tended to increase the extent of happiness of both groups. Middle-aged and older people who had three and more adult children are likely to be happier than those who had fewer than three adult children. Functional solidarity in terms of receiving non-financial support from their adult children helped to increase the happiness of both

middle-aged and older people whilst non-financial support given to adult children only increased the happiness of middle-aged people.

Finally, the cross-tabulation analysis between receiving a public pension benefit and the happiness of older people showed a mixed result. For example, both older women and men who receive the Public Pension Scheme benefit are more likely to report a higher degree of happiness than those who do not receive it. In contrast, both older women and men who receive the Basic Old-Age Pension benefit are less likely to report a higher level of happiness than those who do not get it.

So far, we have explored the characteristics of intergenerational solidarity, public pension systems, and happiness in later life by gender in contemporary South Korea. In order to address the next research questions, we now focus the direction of the analysis on significant associations among the variables. In the next chapter, we will first analyze the significant associations between happiness and the widely accepted general determinants of happiness.

Chapter 7

Associations among Socio-Demographic and Economic Status, Health Condition, and Happiness in Later Life

7.1. Introduction

Many previous empirical studies have reported that not only socio-demographic and economic status but also health conditions are all general determinants of happiness in later life (Plagnol and Scott, 2011; Goodman and colleagues, 2007; Blanchflower and Oswald, 2004; Deaton, 2011). Specifically, Frey and Stutzer (1999) analyzed about 6,000 people living in Switzerland and found that socio-demographic and economic variables are significantly influential indicators that are to be considered when we discuss individuals' happiness. Layard (2005) and Burchardt (2006) also reported the same result. Meanwhile, Plagnol and Scott (2011) analyzed 40,248 people selected from the British Household Panel Survey (three waves in 1997, 2002, and 2007) and found that health condition is one of the most important elements for happiness in later life. Moreover, Ward, Barnes, and Gahagan (2012), Saadat and colleagues (2010), Benito-Leon, Morales, and Rivera-Navarro (2002), and Jia and Lubetkin (2005) also reported the same result.

This chapter aims to analyze how socio-demographic and economic status, and health conditions significantly affect happiness in later life by gender in contemporary South Korea before entering into the main analyses of testing the research hypotheses. For this, correlation analyses were conducted to observe general relationships among all variables. Then multiple regressions were applied for the significance test for all variables followed by the chapter summary.

7.2. Correlation among Socio-Demographic and Economic Status, Health Condition, and Happiness in Later Life

Table 7.1 summarizes the correlation analysis among socio-demographic and economic status, health conditions, and happiness in later life by gender. In general, all variables were significantly correlated with happiness in all groups which meant that further regression analyses can be carried out for estimating the detailed relationships among the indicators.

There are some notable points in these correlation analyses. Several indicators showed a very strong correlation, i.e. more than or equal to 0.7. For example, marital status is strongly positively correlated with the happiness of middle-aged people only. By contrast, religiosity is strongly positively correlated with the happiness of older people only. Education is strongly positively correlated with the happiness of both middle-aged and older people. Employment is also strongly positively correlated with the happiness of middle-aged men only.

Similarly, some indicators showed a somewhat strong correlation, i.e. more than or equal to 0.4 but less than or equal to 0.7. For example, both ADL and IADL are somewhat strongly positively correlated with the happiness of older people only. However, not only depression but also subjective health conditions are somewhat strongly positively correlated with the happiness both of middle-aged and older people.

Table 7.1 Correlation among Socio-Demographic and Economic Status, Health Condition, and Happiness in Later Life by Gender

	Age	Marriage	Religion	Education	Employment	Income
FMAP	-.080**	.793**	.093**	.701**	.006*	.112**
MMAP	.008*	.744**	.138**	.803**	.733**	.298**
FOP	-.095**	.119**	.765**	.733**	.057**	.033*
MOP	-.117**	.088**	.783**	.887**	.117**	.191**
	Vehicle	House	ADL	IADL	Depression	Subjective Health
FMAP	.102**	.231**	-.121**	-.131**	-.509**	.457**
MMAP	.296**	.224**	-.196**	-.262**	-.505**	.447**
FOP	.087**	.245**	-.456**	-.468**	-.671**	.493**

MOP	.213**	.245**	-.412**	-.452**	-.445**	.531**
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Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), **p<.01; *p<.05; 2-tailed, Full information is given in appendix 7.

7.3. Comparison of the Association among Socio-Demographic and Economic Status, Health Condition, and Happiness in Later Life by Gender

The correlation analysis in the previous section showed that all variables were significantly correlated with happiness in later life. However, as table 7.2 illustrates, multiple regression analysis showed a somewhat different picture. Generally, each model accounts for a different amount of variation of happiness. In other words, the model for middle-aged women and men explains 21.2 per cent and 30 per cent of the variance of happiness, respectively. Similarly, the model for older women and men accounts for 23.1 per cent and 29.7 per cent of the variance of happiness, respectively. Moreover, the values of VIF are all below 10, and all values of tolerance are above 0.2, suggesting that there is no multicollinearity (Menard, 1995; Bowerman and O’Connell, 1990; Myers, 1990).

Specifically, marital condition was positively significant for the happiness of middle-aged women and men but not in the older people group. This means that marital status is more important for the happiness of middle-aged people rather than for older people. This result is consistent with previous Western studies in that marital status is relatively more important for middle-aged people than for older people in terms of determining their happiness (George, Okun, and Landerman, 1985; Levinson, 1978).

It also means that married middle-aged women are happier than unmarried middle-aged women, and that married middle-aged men are happier than unmarried middle-aged men. This result is consistent with previous studies. For example, Stanca

(2011) analyzed 223,591 people selected from the World Values Survey and found that married people in later life are happier than unmarried people. Similarly, Alesina and Giuliano (2007) analyzed both World Values Survey (1995-1997 wave) and Multinational Time Use Study (1999-2000 wave) and found that married people are happier than unmarried people. According to Alesina, Tella, and MacCulloch (2004), the United States General Social Survey from 1972 to 1997 and the Euro-barometer Survey Series from 1975 to 1992 also showed that married people are happier than unmarried people. Moreover, many other researchers such as Graham (2011, 2009), Mroczek and Spiro (2005), Pinquart and Soerensen (2000), Gove, Style, and Hughes (1990), Argyle (1987), and Veenhoven (1984) reported that married people are more likely to report higher levels of happiness than unmarried people. The main reason why marriage enhances the level of happiness in later life is that it can provide better self-esteem by creating a feeling of belonging to a certain group (Young and Willmott, 1957). Particularly, the feeling of belonging in a close relationship such as a family provides emotional shelter and support in the face of stressful events (Myers, 1999; Coombs, 1991). Furthermore, marriage can provide deep intimacy, companionship, and supportive emotional exchange (Lang, 2007).

The religion variable was positively significant to the happiness of older women and men. This basically reflects that the religiosity is more critical to the happiness of older people than middle-aged people. This can be explained by the fact that the critical influence of religiosity on happiness becomes important as people get older (Deaton, 2009; Browne et al., 2002). The result also means that religious older women are happier than irreligious older women, and that religious older men are happier than irreligious older men. This is consistent with previous studies reporting that religious people are happier than irreligious people. For example, Ward, Barnes, and Gahagan (2012) interviewed 11 older people aged from 60 to 87 and living in Brighton and Hove in

England and found that religiosity positively affected the happiness of older people. Other studies, such as Ellison and colleagues (2001), Morris (1997), and Headey and Wearing (1992), also reported the same result.

The reason why religious people are more likely to be happier than irreligious people is mainly accounted for chiefly by the role of religiosity rather than by the kind of religion they follow. For example, Kirby, Coleman, and Daley (2004), Black (1999), and Headey and Wearing (1992) found that religious people are happier than irreligious people not because of the religiosity itself, but because they have a belief system to buffer the negative effects of stress in a daily life. Similarly, Emmons (1999) reported that having a certain religion usually provides an opportunity to set a life goal or direction, which protects individuals from stressful events, thereby increasing the extent of happiness. In fact, this kind of positive effect of the role played by religion had been already suggested by Emile Durkheim (2008 [1912]). He showed that religion as a form of integrative institution and religious meeting provides people with channels to communicate and share emotional support. Similarly, many other current researches consistently report that religion as a belief system can promote self-control to mitigate negative incidents (McCullough and Willoughby, 2009; French et al., 2008; Wink et al., 2007).

Moreover, the level of education significantly positively determines the degree of happiness of all age and gender groups. This means that higher-educated people in later life are happier than less-educated people in later life. Many studies also revealed the same result. For example, Graham, Chattopadhyay, and Picon (2010) analyzed the Gallup Daily Poll which surveyed 1,000 households (534,000 people in total) from January 2008 to June 2009 in the USA and found that the level of education was positively associated with the happiness of older people. Stanca (2011) reports that more-

educated people in later life are happier than less-educated people by analyzing 223,591 people selected from the World Values Survey. Similarly, Alesina and Giuliano (2007) analyzed both the World Values Survey and the Multinational Time Use Study and found that more highly educated people are happier than less-educated people. Moreover, EFILWC (2009) and Adler and colleagues (2008) also reported that the highly-educated people are happier than less-educated people.

Most of the previous studies explained this by linking increased possibility of achieving higher rank job and better salary as a result of higher education. For example, Putnam (2000) finds that a higher level of education can provide greater opportunities to find a highly-ranked job, which provides a better salary or good self-esteem. EFILWC (2009) suggests that less education is associated with a lower level of income and this is found for all countries in the survey. In other words, in the EU, people with less than an upper level of secondary education have a household income amounting to two thirds of the income of those who have completed at least an upper secondary education.

Meanwhile, the state of employment significantly positively influences the extent of happiness of middle-aged men only. This means that middle-aged men who are working are happier than those who are not employed. This is consistent with many previous studies. For example, Blanchflower and Oswald (2004) analyzed around 100,000 people randomly selected among Americans and British people from the 1970s to the late 1990s and found that not being employed negatively influences the extent of happiness. Moreover, Luechinger, Meier, and Stutzer (2008) analyzed the 12 waves of the German Socio-Economic Panel for West Germany conducted from 1984 to 2004 and found that unemployment was negatively associated with the happiness of Germans. Winkelmann and Winkelmann (1998) analyzed around 10,000 people sampled from the German Socio-Economic Panel from 1984 to 1990 and found that unemployment was

negatively associated with happiness. Di Tella, MacCulloch, and Oswald (2003) analyzed the sample selected from the European countries between 1975 and 1992 and found that unemployment markedly decreased happiness. Frey and Stutzer (1999) analyzed around 6,000 people surveyed in 1992 in Switzerland and found that unemployment markedly reduced their happiness. Clark and Oswald (1994) analyzed about 6,000 people selected from the British Household Panel Study in 1991 and found that joblessness undermined happiness and that its negative impact was much stronger than that of divorce.

Unlike older people, the vast majority of middle-aged people are still of working age, so that unemployment seriously increases the feeling of worthless, which is detrimental to their happiness (Wilkinson, 2005). In fact, this is more critical for middle-aged men rather than middle-aged women because among the middle-aged generations, the majority of females did not participate in the labour market in South Korea (Kim, 2011; Cho and Jang, 2007) thus the impact of the non-employment on middle-aged women is not as strong as on middle-aged men. A large number of previous studies, such as Graham (2011, 2003), Stutzer and Frey (2010), OECD (2009), Stutzer (2007), Lucas and colleagues (2004), Clark and Oswald (2002), Gerdtham and Johannesson (2001), and Putnam (2000), showed that the negative effect of unemployment on happiness is mainly that unemployment can increase feelings of worthless but decrease the extent of happiness by lessening one's whole income and emotional attachment on labouring (Plagnol, 2010).

Furthermore, the amount of income was positively significant in determining the happiness of middle-aged women and men only. This means that income is more critical for the happiness of middle-aged people rather than for older people. This result is consistent with previous researches in that the amount of income significantly affects the degree of happiness of middle-aged people (Campbell, Converse, and Rodgers, 1976) but

does not have this effect among older people (Bowling et al., 2002). This also shows that South Korean middle-aged people, overall, display very similar characteristics to those of Western people in the relationship between the amount of income and the degree of the happiness in that the extent of happiness is positively associated with the amount of income (Ferrer-i-Carbonell, 2005; Ferrer-i-Carbonell and Frijters, 2004; Senik, 2004; Frey and Stutzer, 2002).

The result reflects that middle-aged women who have more income are happier than middle-aged women who have less income and that middle-aged men who have more income are happier than those have less income. This is consistent with previous studies of the positive relationship between the amount of income and the level of happiness in later life. For example, Sacks, Stevenson, and Wolfers (2012) analyzed four data sets including the Gallup World Poll, World Values Survey, Pew Global Attitudes Survey, and Eurobarometer and found that the income, in general, is positively associated with the degree of happiness in 140 countries. The United States General Social Survey from 1972 to 1997 and the Eurobarometer Survey Series from 1975 to 1992 also showed that those who have a greater income are happier than those who earn less (Alesina, Tella, and MacCulloch, 2004). Similarly, Graham and Pettinato (2000) reported that the amount of income is positively associated with the level of happiness. Many other studies, including Sacks (2011), Graham, Chattopadhyay, and Picon (2010), Greve (2008), Nilsson, Rana, and Kabir (2006), Arthaud-Day and Near (2005), Landau and Litwin (2001), unequivocally found that income has a positive effect on the extent of happiness in later life. In particular, Gerdtham and Johannesson (2001: 554) reported that “the predicted probability of being happy most of the time increases from 0.53 in the lowest income quartile to 0.61 in the highest income quartile”.

This might be because of power of money, which not only expands our

capability to carry out tasks but also provides more opportunity to choose what we want to do (Myers, 2013 forthcoming). For instance, a good income enables people to meet their living costs more easily (Sacks, Stevenson, and Wolfers, 2012; Gabriel and Bowling, 2004), enjoy leisure activities which makes them feel worthy beings (Lundberg et al., 2008), and purchase good quality food and health care services (Help the Aged, 2008; Crombie et al., 2005; Minujin and Delamonica, 2004), and so on. Additionally, having enough money can protect people from the unexpected, thus making them less fearful and increasing the extent of their happiness (The Royal Society, 2012; Ward, Barnes, and Gahagan, 2012; OECD, 2011a).

The ownership of a vehicle significantly and positively affects the happiness of both older women and men. This implies that they are happier than older women and men who do not have a vehicle. It also indicates that vehicle ownership is more critically important for the happiness of older women and men than for middle-aged people. This result supports the previous research which analyzed 12,235 people aged 50 and over, selected from the first wave of the English Longitudinal Study of Ageing, which reported that having a car significantly improved happiness in later life (Netuveli et al., 2006).

On the one hand, this is because mobility itself provides “joy” and even “life itself” to older people (Mollenkopf et al., 2004b: 126). On the other hand, it might be because of the function of the vehicle. For instance, Gabriel and Bowling (2004) explain that transportation facility enables people to control their movement freely, without anxiety and in this way it can increase their level of happiness. Similarly, Mollenkopf and colleagues (2004a) analyzed 3,950 older people sampled from the European Commission’s MOBILATE Project conducted in 2000, which included Finland, the Netherlands, Germany, Hungary, and Italy. They found that the degree of happiness of older people living in a rural area, in general, was lower than that of those living in an

urban area because of the poor transportation in rural areas.

Having a house also significantly and positively affects the extent of the happiness of both middle-aged and older people. This means that middle-aged and older people who have a house are happier than middle-aged and older people who do not have a house. This is consistent with many previous researches. For instance, Ward, Barnes, and Gahagan (2012) interviewed 11 older people aged from 60 to 87 and living in Brighton and Hove in England and found that having a house could increase the feeling of security, thereby influencing the happiness of older people in a positive manner. Howden-Chapman and colleagues (2011) also reported that older people who have a house are less depressed than those who rent a house by analyzing the Whitehall II Study. Lawton, Silverstein, and Bengtson (1994) showed that those who have their own house are more likely to receive the emotional stability than tenants. The result also implies that having one's own house is very important for happiness throughout later life. This is particularly more important because people are more likely to spend much time inside a house in later life (Pynoos and Regnier, 1991).

The result is somewhat unsurprising because having a house is a basic human need (Maslow, 1987) and satisfying basic needs makes people happier (Schyns, 1998). It might also be that owning a house can increase the degree of happiness because it guarantees a sheltered place to rest and protects one's privacy, and so forth (OECD, 2011a). Moreover, owning a house can provide a financial tool for retirement and as a form of safe asset it surely increases one's feeling of security (Arber et al., 2003; Doling and Ronald, 2011).

Meanwhile, physical health conditions in terms of both ADL and IADL are positively significant in determining the level of happiness of older women and men only. The result shows that ADL and IADL are more important for the happiness of older

people rather than middle-aged people. Actually, this is not unusual in the sense that the level of physical health decreases as people age (Idler and Kasl, 1995; Chandola et al., 2007; Zaidi, 2008; Coote, 2009). This also means that older people who have good ADL and IADL competence are happier than those who have poor ADL and IADL. This result supports the previous studies. For example, the onset of disability decreases the degree of happiness (Lucas, 2007), in particular a lower degree of ADL and IADL reduces the extent of happiness (Rodin, 1986; Ross, Mirowsky, and Goldstein, 1990; Schuurmans, 2004) whereas a higher level of physical functioning produces greater happiness (Rennemark et al., 2009; Menec and Chipperfield, 1997). The more recent study conducted by Jonker and colleagues (2009) also reported that there was a significant positive association between physical functioning and the happiness of older people by analyzing the Longitudinal Aging Study Amsterdam. Similarly, many researchers, such as Krokavcova and colleagues (2008), Juth, Smyth, and Santuzzi, (2008), Jang and colleagues (2002), Clark and Oswald (2002), Gerdtham and Johannesson (2001), and Ormel and colleagues (1997) reported that better physical health condition strongly positively influenced the happiness of older people.

Moreover, mental health condition in terms of the extent of depression is positively associated with the degree of happiness of both middle-aged and older people by gender. This means that middle-aged and older people who have lower levels of depression are happier than those who have higher levels of depression. The result is not surprising; many previous studies also reported the same finding. More recently, for instance, Visser-Meily and colleagues (2009) found that depression was strongly negatively associated with the degree of happiness by analyzing the patients who survived aneurysmal subarachnoid hemorrhage in the University Medical Centre Utrecht.

Similarly, subjective health condition is positively associated with the extent of

happiness of both middle-aged and older people by gender. This means that middle-aged and older people who reported higher level of subjective health are happier than those reported lower degree of the subjective health status. This result is consistent with the previous studies. For example, Gwozda and Sousa-Poza (2009) analyzed older people sampled from the German Socio-Economic Panel and found that those who reported lower level of subjective health status also reported lower level of happiness. Similarly, others such as Kahana and colleagues (1995), Kasser and Ryan (1999), Nix and colleagues (1999), and Martin and colleagues (2000) found that positive perception of one's health status is beneficial for mitigating the symptoms of negative mood and that this results in happiness.

The result of the relationship between physical health, mental health, subjective health condition, and happiness is probably because having difficulty in managing one's life independently undermines one's autonomy, thereby increasing the level of stress (Park, 2009; Kelly et al., 2000; Pearlman and Uhlmann, 1991) but lessening the extent of happiness (Lucas, 2007; Jonker et al., 2008; Myers and Diener, 1996). It also might be the result of the impact of disability on the happiness of older people. In other words, the pathway of the effect is the power of physical health status declining the positive psychological conditions which play a key role for coping with detrimental health problems (Hamerman, 1999; Krause and Alexander, 1990). For example, physical malfunctioning deprives individuals of psychosocial resources, including mastery²² (Smits, Deeg, and Bosscher, 1995; Forbes, 2001; Schuurmans, 2004), self-esteem (Pearlin et al., 1981; Krause, 1987; Schieman and Campbell, 2001), and self-efficacy (Silverstein and Bengtson, 1994; Bandura, 1977), all positively associated with the happiness of older people. Additionally, better physical health status can sometimes yield

²² Mastery refers to the extent to which people see themselves as being in control of the forces that significantly affect their lives (Krokavcova et al., 2008: 1237).

a higher degree of happiness by increasing leisure time (Everard, 1999; Lampinen et al., 2006). Furthermore, many scholars explain the reason for the significant relationship between subjective health condition and happiness broadly in two ways. One is that having a positive attitude towards one's health functions in itself as a positive driver for the level of happiness (Gasior and Zaidi, 2010; Jang, Poon, and Martin, 2004). The other possible explanation is related to medication. In other words, those who report a higher level of subjective health status are less likely to use medication and that protects them against drug addiction caused by frequent usage of drugs (Balkrishnan, Christensen, and Bowton, 2002). This consequently contributes to at least physically healthy daily life that produces happiness in a long term view (Jang et al., 2009).

Table 7.2 Associations among Socio-Demographic and Economic Status, Health Condition, and Happiness in Later Life by Gender

Independent Variables			FMAP	MMAP	FOP	MOP
S D S	Age	B	-.111	.328	-.018	-.191
		(SE)	(.095)	(.076)	(.078)	(.080)
		β	-.032	.093	-.006	-.060
	Marriage (married =1)	B	5.874	14.114	2.188	2.175
		(SE)	(1.237)	(1.423)	(.993)	(1.419)
		β	.116***	.205***	.054	.035
Religion (religious =1)	B	3.060	4.109	1.620	1.978	
	(SE)	(.879)	(.729)	(.912)	(.873)	
	β	.083	.110	.040*	.051**	
S E S	Education (log)	B	1.699	1.675	2.186	1.639
		(SE)	(.506)	(.411)	(.802)	(.428)
		β	.093***	.091***	.064***	.094***
	Employment (employed =1)	B	1.987	3.164	.350	.139
		(SE)	(.929)	(1.015)	(1.329)	(1.018)
		β	.055	.069***	.006	.003
	Income (log)	B	1.001	2.013	.020	.011
		(SE)	(.001)	(.076)	(.001)	(.020)
		β	.091**	.094***	.015	.057
	Vehicle (having =1)	B	2.161	4.381	8.100	5.539
(SE)		(1.442)	(.796)	(3.628)	(1.188)	
β		.037	.118	.050**	.114***	
House (having =1)	B	8.298	5.231	9.823	9.047	
	(SE)	(1.098)	(.928)	(1.142)	(1.200)	

		β	.184***	.115***	.193**	.172***
P H	ADL (log)	B	-2.998	-.461	-1.236	-1.268
		(SE)	(1.821)	(.755)	(.560)	(.310)
	IADL (log)	β	-.068	-.017	-.074*	-.159*
		B	-.162	-2.003	-.149	-1.263
		(SE)	(.961)	(.388)	(.286)	(.310)
		β	-.007	-.148	-.019*	-.159**
M H	Depression (log)	B	-6.590	-5.605	-8.219	-5.536
		(SE)	(.851)	(.842)	(.735)	(.812)
		β	-.200***	-.141***	-.276***	-.171***
Subjective Health		B	2.852	1.188	3.610	3.029
		(SE)	(.521)	(.442)	(.602)	(.540)
		β	.146***	.059***	.150***	.141***
Constant			57.008	26.497	69.551	50.354
(SE)			(6.078)	(5.119)	(6.634)	(6.72)
R ²			.212	.300	.231	.297
F			31.64***	67.1***	39.33***	50.5***

Note: SDS (Socio-Demographic Status), SES (Socio-Economic Status), PH (Physical Health), MH (Mental Health), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), *P<.05; **P<.01; ***P<.001

7.4. Conclusion

In this chapter, we have analyzed the significant association between socio-demographic and economic status, health conditions and happiness in later life by gender in contemporary South Korea. The results showed the following. Regarding socio-demographic status, marital condition was positively associated with the degree of happiness of middle-aged women and men only. This means that married middle-aged women are happier than unmarried middle-aged women, and that married middle-aged men too, are happier than unmarried middle-aged men. Moreover, religiosity was positively associated with the extent of happiness, only of older women and men. This implies that religious older women are happier than irreligious older women and that religious older men are happier than irreligious older men.

Regarding socio-economic status, education was positively associated with the

degree of happiness of all age and gender groups. This reflects that higher-educated people in later life are happier than lower-educated people in later life. Additionally, being employed was positively associated with the extent of happiness of middle-aged men only. This means that middle-aged men who are working are happier than those who are not employed. The amount of income was also positively associated with the extent of happiness of both middle-aged women and men. It means that middle-aged women who have a greater income are happier than middle-aged women who have less income, and that middle-aged people who have more income are happier than those who have less. The ownership of a vehicle was positively associated with the degree of happiness of older women and men. This implies that older women and men who have a vehicle are happier than older women and men who do not have a vehicle. Having a house was also positively associated with the extent of happiness of both middle-aged and older people. This means that middle-aged and older people who have a house are happier than middle-aged and older people who do not have a house.

Meanwhile, physical health conditions in terms of both level of ADL and IADL were associated positively with the level of happiness of both older women and men. It means that older people who have stronger ADL and IADL capabilities are happier than those who have weaker ADL and IADL capabilities. Moreover, the condition of people's mental health in terms of the extent of depression was positively associated with the extent of the happiness of both middle-aged and older people. This implies that middle-aged and older people who have lower level of depression are happier than those who have higher level of depression. Furthermore, the subjective health condition is positively associated with the extent of the happiness of both middle-aged and older people. This means that middle-aged and older people who scored higher levels of subjective health status are happier than those who reported a lower subjective health status.

Consequently, our results show that there are significant associations among socio-demographic and economic status, health conditions, and happiness in later life in contemporary South Korea, as many previous studies reported. This suggests that these variables should be controlled when we test the main research hypotheses, which will be discussed in the next chapter.

Chapter 8

The Dynamics of the Impact of Family Support on Happiness in Later Life

8.1. Introduction

This chapter aims to analyze the impact of the family support on happiness in later life by addressing the second research question asking what specific dimensions of intergenerational solidarity significantly determine the degree of happiness in later life in contemporary South Korea. This is the first academic research analyzing the significant association between intergenerational solidarity and happiness in later life in contemporary South Korea by exploiting the nationally representative data set following the enormous demographic transitions that have taken place there. To this end, six specific research hypotheses on the relationship between structural solidarity, associational solidarity, functional solidarity and happiness in later life were tested using hierarchical multiple regression by gender.

The analysis generally shows that in structural solidarity, hypothesis 1-1 (no significant relationship between the number of adult children and happiness in later life) is supported in both middle-aged women and men while it is rejected in both older women and men. However, the hypothesis 1-2 (a positive relationship between the geographical proximity and happiness in later life) is rejected in both middle-aged women and men as well as both older women and men.

Regarding associational solidarity, hypothesis 2-1 (a positive association between the frequency of face-to-face meeting and happiness in later life) is rejected not only in both middle-aged women and men but also in older women and men. Hypothesis 2-2 (a positive association between the frequency of contact via other communication channels and happiness in later life) is rejected in both middle-aged women and men whilst it is supported in both older women and men.

Regarding functional solidarity, hypothesis 3-1 (a positive association between the amount of financial support received from adult children as well as providing it to their adult children and happiness in later life) is rejected in both middle-aged women and men whilst it is supported in both older women and men. Hypothesis 3-2 (a positive association between non-financial support received from adult children and provided to adult children and happiness in later life) is not supported either in middle-aged women and men or in older women and men.

In the following sections, interpretations and implications of the results of the hypothesis test are explained. Then the chapter concludes with summarizing the key findings.

8.2. Structural Solidarity and Happiness in Later Life

8.2.1. Correlation between Structural Solidarity and Happiness in Later Life

Table 8.1 summarizes the correlation analysis between structural solidarity and happiness both of middle-aged and older people. The result of the correlation analysis partially refuted the aforementioned first hypothesis, namely that no significant relationship exists between the number of adult children and happiness in later life (hypothesis 1-1) as well as a positive relationship between geographical proximity and happiness in later life (hypothesis 1-2). In other words, the correlation analysis tells us that there is a high possibility of a positive relationship between the number of adult children and the level of happiness both of middle-aged and older people. By contrast, there is the possibility of a negative relationship between geographical proximity and the level of happiness both of middle-aged and older people. Does this simply mean that South Korean middle-aged and

older people are in an opposite situation to those living in Western countries? The answer should be cautiously considered because this correlation analysis did not consider the relevant control indicators. Therefore the hierarchical multiple regression analysis is carried out at the next section.

Table 8.1 Correlation between Structural Solidarity and Happiness in Later Life by Gender

Happiness	Number of Adult Children	Geographical Proximity (1 st Child)	Geographical Proximity (2 nd Child)	Geographical Proximity (3 rd Child)
FMAP	.106*	.112*	.108*	.116*
MMAP	.108*	.131*	.139*	.113*
FOP	.351**	.116*	.121*	.109*
MOP	.413**	.124*	.103*	.110*

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), **p<.01; *p<.05; 2-tailed, Full information is given in appendix 8.

8.2.2. Comparison of the Association between Structural Solidarity and Happiness in Later Life by Gender

Table 8.2 illustrates the results of the hierarchical multiple regressions evaluating the power of the structural solidarity to predict the extent of happiness of both middle-aged and older people by gender. To achieve more robust results, we controlled for the effects of socio-demographic and economic status, health conditions, public pension systems including the National Pension Scheme and Basic Old-Age Pension as well as family support such as associational solidarity and functional solidarity. Basically, every model displays a different amount of variation of happiness in each group. In other words, the full model of middle-aged women and men explains 35.5 per cent and 45.8 per cent of the

variance of happiness, respectively. In a similar vein, the final model of older women and men accounts for 43.7 per cent and 44.8 per cent of the variance of happiness, respectively. In all regression models, the values of VIF are all below 10 as well as all values of tolerance are above 0.2 meaning that there is no multicollinearity (Menard, 1995; Bowerman and O'Connell, 1990; Myers, 1990).

The specific result verifies the first hypothesis by gender as follows. Neither the number of adult children nor the geographical proximity is statistically significant in middle-aged women and men. This suggests that the first sub-hypothesis, namely no significant relationship between the number of adult children and happiness in later life (hypothesis 1-1), is supported whilst the second sub-hypothesis, i.e. a positive relationship between the geographical proximity and happiness in later life (hypothesis 1-2) is rejected. This result implies that structural solidarity in terms both of the number of adult children and the geographical proximity is not an influential determinant of the happiness of middle-aged women and men.

However, the variable of the number of adult children is statistically significant whereas that of geographical proximity is not, in both older women and men. This means that the first sub-hypothesis, i.e. no significant relationship between the number of adult children and happiness in later life (hypothesis 1-1), is rejected as well as the second sub-hypothesis, namely a positive relationship between the geographical proximity and happiness in later life (hypothesis 1-2). Consequently, this implies that both older women and men who have more adult children are happier than those who have fewer adult children. Therefore, unlike among middle-aged group, structural solidarity in terms of the number of adult children is a critical element of happiness of both older women and men.

This result is consistent with previous studies in that the presence of children is critical to happiness in later life (Myers and Diener, 1995) and having more children

increases the extent of happiness in later life (Myers, 1999). The significant powerful effect of the number of adult children on the happiness of both older women and men might be partially accounted for by the increased opportunities for older people for sharing a positive emotional support with their adult children. For instance, during structural interviewing of non-institutionalized older people living in New York, Dean and colleagues (1992) found that those who live with more children are more likely to show better emotional stability than those who live with fewer children. Additionally, it seems that the greater availability of adult children can increase the possibility of rich social network of older parents in that more family members extend the social channel to convey greater social bonds (Antonucci and Akiyama, 1995).

Moreover, the fact that the number of adult children is not significant among middle-aged people but is significant in older people can be partially explained by the changed attitude to the value of the number of children in modern South Korea. In other words, older people hold relatively stronger Confucianist views of fecundity as a source of great happiness of family than middle-aged people. In reality, the power of the value of the number of children decreases as South Koreans get younger, namely, being weaker among the younger generation than among middle-aged parents, and that of middle-aged parents is weaker than older parents (KNSO, 2010b, 2009c, 1999).

Furthermore, the insignificance of geographical proximity on the happiness of both middle-aged and older people is partially attributable to telecommunication technology developed after modernization. In other words, long-distance kinship has arisen primarily since the society has been modernized and industrialized, and fragmenting the traditional family network (Chambers, 2006). According to Webber (1973), technological development produced by industrialization allows people to maintain real-time intimate relationships even though they are physically apart. Network

sociologists account for this phenomenon as ‘freedom from spatial borderline’ or ‘immediate and decentralized connections’ (Knorr-Cetina, 2001; Wellman, 1996; Poster, 1995; Fischer, 1982). It should be noted that this does not mean a dismantling of South Korean kinship itself but rather that it is a new form of kinship. This is equivalent to the Castells’ argument (2000, 1999) that the networked society does not mean the collapse of social relations but rather the reorganization of the social connectedness.

Table 8.2 Association between Structural Solidarity and Happiness of Middle-aged and Older People by Gender

Independent Variables			Socio-demographic Status			Socio-economic Status					Health Condition				Constant (SE)	R ² (ΔR ²)	F	
			Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having=1)	House (having=1)	Physical Health		Mental Health	Subjective Health				
											ADL (log)	IADL (log)	Depression (log)					
F M A P	M 1	B (SE) β	-.223 (.182) -.064	9.336 (2.653) .185***	3.645 (1.912) .099										64.691 (10.529)	.050	6.17 ***	
	M 2	B (SE) β	-.021 (.199) -.006	6.993 (2.615) .138**	3.359 (1.858) .092	2.942 (1.047) .161**	.350 (1.996) .010	1.408 (1.068) .074	2.372 (3.048) .040	9.432 (2.320) .209***					39.124 (12.607)	.129 (.079) ***	6.4 ***	
	M 3	B (SE) β	-.139 (.177) -.040	5.505 (2.322) .109*	2.140 (1.651) .058	1.388 (.940) .076**	2.005 (1.779) .055	.804 (.948) .042	1.544 (2.070) .026	6.941 (2.070) .154**	-2.056 (3.414) -.047	-.522 (1.798) -.023	-3.666 (1.628) -.111***	.372 (.045) .414***	22.600 (11.835)	.327 (.198) ***	13.86 ***	
	M 4	B (SE) β	-.077 (.202) -.022	4.750 (2.406) .094*	2.147 (1.658) .059	1.437 (.976) .078**	1.843 (1.797) .051	.898 (.955) .047	1.540 (2.713) .026	6.200 (2.104) .137**	-1.933 (3.439) -.044	-1.169 (1.818) -.007	-3.317 (1.658) -.101**	.359 (.046) .399**				
	M 5	B (SE) β	-.099 (.203) -.029	3.969 (2.444) .078*	1.834 (1.672) .050	1.628 (.992) .089**	1.918 (1.799) .053	.804 (.956) .042	1.162 (2.716) .020	5.525 (2.129) .123*	-1.603 (3.442) -.036	-.026 (1.818) -.001	-3.320 (1.659) -.101**	.351 (.046) .391**				
M M A P	M 1	B (SE) β	-.076 (.220) -.021	23.166 (4.301) .336***	4.114 (2.325) .110										45.147 (12.592)	.131	11.32 ***	
	M 2	B (SE) β	-.369 (.231) -.104	14.783 (4.290) .214**	4.049 (2.196) .109	2.131 (1.211) -.115***	6.222 (2.953) .136***	2.117 (1.245) .120***	5.202 (2.402) .141	5.575 (2.803) .122***					3.959 (14.610)	.250 (.119) ***	9.21 ***	
	M 3	B (SE) β	-.358 (.205) -.101	11.345 (3.862) .164**	2.975 (1.965) .080	1.365 (1.083) .074**	1.337 (2.746) .029**	1.118 (1.115) .063**	4.421 (2.152) .091	3.378 (2.499) .097**	-.695 (2.029) -.025	-1.113 (1.049) -.082	-2.810 (2.275) -.071***	.356 (.054) .400***	.528 (13.923)	.417 (.167) ***	12.92 ***	
	M 4	B (SE) β	.268 (.244) .076	10.654 (3.954) .154*	3.201 (1.978) .086	1.102 (1.095) .060**	1.292 (2.810) .028*	.740 (1.131) .042*	3.074 (2.161) .083	3.891 (2.509) .085*	-.504 (2.031) -.018	-1.304 (1.052) -.096	-2.209 (2.290) -.056**	.342 (.054) .384**				
	M 5	B (SE) β	.279 (.247) .079	9.791 (4.159) .142*	2.613 (2.005) .070	1.126 (1.099) .061**	1.281 (2.816) .028*	.530 (1.139) .030*	2.721 (2.172) .074	3.621 (2.529) .079*	-.335 (2.033) -.012	-1.139 (1.055) -.084	-2.343 (2.298) -.059*	.328 (.055) .368*				
Independent Variables			Associational Solidarity				Functional Solidarity				Structural Solidarity							
			Meeting (1 st)	Meeting (2 nd)	Meeting (3 rd)	Contacting (1 st , log)	Contacting (2 nd , log)	Contacting (3 rd , log)	Amount of Money Received from Adult Children (log)	Financial Support to Adult Children (provided=1)	Non-financial Support from Adult Children (received=1)	Non-financial Support to Adult Children (provided=1)	Number of Adult Children	Proximity (1 st)	Proximity (2 nd)	Proximity (3 rd)		
F M A P	M 4	B (SE) β	.138 (.469) .016	.058 (.491) .007	-.712 (.510) -.078	-.898 (.634) -.088	.343 (.659) .034	-.507 (.632) -.049	-.261 (.758) -.017	-1.414 (1.995) -.039	.453 (3.318) .006	.142 (2.060) .004				34.249 (14.419)	.344 (.018)	7.95 ***
	M 5	B (SE) β	.063 (.606) .008	-.581 (.611) -.068	-.972 (.618) -.107	-.796 (.636) -.078	.333 (.664) .033	-.460 (.644) -.045	-.629 (.782) -.040	-1.457 (2.017) -.040	1.023 (3.337) .014	.179 (2.096) .005	1.036 (.925) .059	.117 (1.048) .007	1.751 (1.065) .113	.362 (1.055) .023	31.290 (14.425)	.355 (.010)
M M A P	M 4	B (SE) β	.090 (.565) .010	.675 (.630) .077	-1.423 (.740) -.150	-1.224 (.740) -.123	.222 (.777) .022	-.204 (.784) -.019	-.354 (.901) -.022	-1.234 (2.448) -.033	.400 (4.359) .005	.691 (2.727) .016				17.235 (18.478)	.447 (.030)	7.61 ***
	M 5	B (SE) β	-.309 (.730) -.035	.695 (.781) .079	-1.913 (.734) -.202	-1.191 (.741) -.120	-.278 (.782) .028	-.370 (.797) -.035	-.694 (.938) -.043	-1.284 (2.478) -.035	1.476 (4.407) .018	1.159 (2.795) .027	1.342 (1.240) .068	.907 (1.260) .056	-.117 (1.324) -.007	1.594 (1.203) .096	14.310 (18.562)	.458 (.011)

Table 8.2 Association between Structural Solidarity and Happiness of Middle-aged and Older People by Gender (continued)

Independent Variables			Socio-demographic Status			Socio-economic Status					Health Condition				Constant (SE)	R ² (ΔR ²)	F
			Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having=1)	House (having=1)	Physical Health		Mental Health	Subjective Health			
											ADL (log)	IADL (log)	Depression (log)				
F O P	M 1	B (SE) β	-.186 (.095) -.063	3.790 (1.294) .094	2.128 (1.199) .052**									65.823 (7.406)	.021	8.00 ***	
	M 2	B (SE) β	-.167 (.096) -.057	1.860 (1.279) .046	1.702 (1.158) .042*	3.846 (1.004) .112***	2.765 (1.744) .049	-.974 (.591) -.051	10.244 (4.590) .063	12.125 (1.444) .239***				52.546 (8.049)	.100 (.080) ***	15.85 ***	
	M 3	B (SE) β	-.041 (.082) -.014	1.615 (1.044) .040	.255 (.948) .006*	.662 (.830) .019**	-.696 (1.432) -.012	-.700 (.485) -.037	8.296 (3.745) .051	7.593 (1.193) .150**	-.704 (.582) -.042*	-.198 (.297) -.025*	-3.756 (.784) -.126***	.456 (.024) .503***	36.852 (6.949)	.404 (.303) ***	63.89 ***
	M 4	B (SE) β	-.013 (.083) -.004	1.264 (1.060) .031	.429 (.950) .011*	.465 (.831) .014**	-.450 (1.430) -.008	-.993 (.499) -.052	8.021 (3.735) .050	6.796 (1.219) .134**	-.738 (.580) -.044*	-.213 (.296) -.027*	-3.735 (.782) -.125***	.453 (.024) .500**			
	M 5	B (SE) β	.041 (.083) .014	1.485 (1.065) .037	.455 (.948) .011*	.114 (.824) .003*	.586 (1.476) .010	-.828 (.498) -.043	7.776 (3.708) .048	6.389 (1.210) .126*	-.812 (.574) -.049*	-.300 (.294) -.037*	-3.438 (.776) -.115**	.436 (.024) .481**			
	M 6	B (SE) β	.006 (.084) .002	1.112 (1.067) .028	.528 (.943) .013*	.428 (.825) .013*	-.155 (1.486) -.003	-.601 (.506) -.031	6.988 (3.695) .043	5.711 (1.217) .112*	-.834 (.571) -.050*	-.346 (.292) -.043*	-3.387 (.773) -.114**	.438 (.024) .484*			
M O P	M 1	B (SE) β	-.362 (.101) -.113	4.103 (1.985) .065	3.607 (1.222) .093***									79.902 (7.872)	.030	10.13 ***	
	M 2	B (SE) β	-.004 (.105) -.001	2.302 (1.870) .037	2.993 (1.154) .077**	2.469 (.545) .141***	1.687 (1.405) .041	1.841 (.607) .106	6.547 (1.545) .135***	11.345 (1.570) .215***				34.146 (8.781)	.152 (.122) ***	22.16 ***	
	M 3	B (SE) β	.221 (.089) .069	2.659 (1.562) .042	.826 (.964) .021**	1.099 (.459) .063**	-1.604 (1.179) -.039	1.069 (.508) .062	4.289 (1.289) .088**	8.038 (1.315) .152**	-.744 (.608) -.051*	-.716 (.341) -.090**	-2.315 (.915) -.071***	.386 (.026) .450***	11.390 (7.593)	.417 (.265) ***	58.74 ***
	M 4	B (SE) β	.285 (.092) .089	2.555 (1.557) .041	.931 (.961) .024**	1.058 (.461) .061*	-1.554 (1.176) -.038	.719 (.520) .041	4.046 (1.286) .083*	7.138 (1.347) .135*	-.825 (.606) -.056*	-.697 (.340) -.088**	-2.222 (.912) -.068**	.385 (.026) .448**			
	M 5	B (SE) β	.287 (.094) .090	2.511 (1.555) .040	.551 (.955) .014*	.807 (.466) .046*	-1.337 (1.189) -.033	.818 (.518) .047	4.220 (1.274) .087**	6.731 (1.348) .128*	-.933 (.600) -.063*	-.622 (.336) -.078*	-1.817 (.907) -.056*	.373 (.026) .435**			
	M 6	B (SE) β	.262 (.100) .082	2.128 (1.564) .034	.506 (.955) .013*	.851 (.469) .049*	-1.592 (1.198) -.039	.806 (.517) .046	4.182 (1.273) .086*	6.255 (1.371) .119*	-.960 (.601) -.605*	-.606 (.336) -.076*	-1.938 (.907) -.060*	.373 (.026) .434**			

Table 8.2 Association between Structural Solidarity and Happiness of Middle-aged and Older People by Gender (continued)

Independent Variables			Public Pensions		Associational Solidarity						Functional Solidarity				Structural Solidarity			Constant (SE)	R ² (ΔR ²)	F
			NPS (received =1)	BOAP (received =1)	Face-to-face Meeting (1 st Child)	Face-to-face Meeting (2 nd Child)	Face-to-face Meeting (3 rd Child)	Contacting via other communication channels (1 st Child, log)	Contacting via other communication channels (2 nd Child, log)	Contacting via other communication channels (3 rd Child, log)	Amount of Money Received from Adult Children (log)	Financial Support to Adult Children (provided =1)	Non-financial Support from Adult Children (received =1)	Non-financial Support to Adult Children (provided =1)	Number of Adult Children	Geographical Proximity (1 st Child)	Geographical Proximity (2 nd Child)			
F O P	M 4	B (SE) β	.528 (1.685) .007	-2.975 (1.007) -.073*														37.612 (6.995)	.408 (.005) *	55.72 ***
	M 5	B (SE) β	.428 (1.668) .006	-2.613 (.999) -.064*	.279 (.305) .027	.104 (.310) .010	-.639 (.315) -.059	-.568 (.331) -.057*	-.232 (.331) -.024	-.441 (.326) -.043	1.117 (.430) .062**	-.587 (1.616) -.009	3.823 (2.080) .042	-.769 (1.228) -.015				34.192 (7.645)	.429 (.020) ***	35.05 ***
	M 6	B (SE) β	.238 (1.664) .003	-2.457 (.996) -.061*	-.061 (.367) -.006	-.241 (.377) -.023	-.689 (.384) -.063	-.534 (.330) -.054*	-.237 (.335) -.024	-.504 (.325) -.049	.821 (.435) .046**	.850 (1.686) .012	3.969 (2.069) .043	-1.020 (1.228) -.020	.953 (.301) .082**	.727 (.557) .041	.789 (.583) .044	.099 (.579) .006	33.459 (7.616)	.437 (.008) **
M O P	M 4	B (SE) β	1.963 (1.142) .045*	-2.764 (1.102) -.067*														8.976 (7.785)	.423 (.006) **	51.4 ***
	M 5	B (SE) β	1.978 (1.129) .045*	-2.667 (1.090) -.065*	-.549 (.297) -.057	.714 (.304) .076	-.604 (.306) -.060	-.542 (.343) -.055*	-.617 (.356) -.064	.438 (.343) .044	1.325 (.441) .077**	1.802 (2.007) .022	1.047 (1.137) .023	-1.409 (1.690) -.021				9.841 (8.168)	.444 (.021) *	32.38 ***
	M 6	B (SE) β	1.810 (1.133) .041*	-2.601 (1.090) -.063*	-.647 (.359) -.067	.529 (.387) .057	-1.069 (.376) -.106	-.525 (.343) -.053*	-.547 (.357) -.057	.433 (.345) .043	1.176 (.447) .068**	1.902 (2.005) .023	.820 (1.147) .018	-1.446 (1.713) -.021	.238 (.350) .019*	.185 (.571) .011	.254 (.619) .015	1.190 (.616) .070	11.743 (8.389)	.448 (.004) *

Note: M (Model), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), NPS (National Pension Scheme), BOAP (Basic Old-Age Pension), *P<.05, **P<.01, ***P<.001

8.3. Associational Solidarity and Happiness in Later Life

8.3.1. Correlation between Associational Solidarity and Happiness in Later Life

As showed in the second hypothesis, one can expect that both frequent face-to-face meeting and contact via other communication channels will be associated positively with the degree of happiness in later life. This presumption is partially supported by the correlation analysis as table 8.3 illustrates. In other words, the main implication that the analysis reveals is that the more frequent face-to-face meeting as well as contact via other communication channels is positively correlated with the extent of happiness of both middle-aged and older people. However, what must be considered is that the analysis cannot show a more sophisticated relationship between the frequency of face-to-face meeting, contact via other communication channels, and the level of happiness. For example, at this stage, we cannot prove which adult child's frequency of meeting and other contact significantly determines the happiness of middle-aged and older people and to what extent the frequency of meeting and contact affect the happiness of both groups when we consider control variables such as socio-demographic and economic status as well as health conditions. Therefore, hierarchical multiple regression has been used to clarify the vague results at the following section.

Table 8.3 Correlation between Associational Solidarity and Happiness in Later Life by Gender

Happiness	Face-to-face Meeting (1 st Child)	Face-to-face Meeting (2 nd Child)	Face-to-face Meeting (3 rd Child)	Contacting via other communication channels (1 st Child)	Contacting via other communication channels (2 nd Child)	Contacting via other communication channels (3 rd Child)
FMAP	-.139*	-.113*	-.129*	-.139*	-.124*	-.147*

MMAF	-.149*	-.109*	-.100*	-.115*	-.132*	-.152*
FOP	-.116*	-.132*	-.167*	-.385**	-.134*	-.145*
MOP	-.178*	-.102*	-.152*	-.407**	-.156*	-.153*

Note: FMAF (Female Middle-aged People), MMAF (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), **p<.01; *p<.05; 2-tailed, Full information is given in appendix 9.

8.3.2. Comparison of the Association between Associational Solidarity and Happiness in Later Life by Gender

Table 8.4 shows the results of the hierarchical multiple regressions, which evaluate the power of associational solidarity to predict the degree of happiness of both middle-aged and older people by gender. Again, we controlled for the effects of socio-demographic and economic status, health conditions, public pension systems including the National Pension Scheme as well as Basic Old-Age Pension, and family support such as structural solidarity and functional solidarity to produce the more robust result. Each model explains different amount of variation of happiness in each group. In other words, the full model of middle-aged women and men explains 35.5 per cent and 45.8 per cent of the variance of happiness, respectively. Similarly, the final model of older women and men accounts for 43.7 per cent and 44.8 per cent of the variance of happiness, respectively. Moreover, the values of VIF are all below 10, and all values of tolerance are above 0.2, suggesting that there is no multicollinearity (Menard, 1995; Bowerman and O’Connell, 1990; Myers, 1990).

The regression verifies the second hypothesis by gender as follows. Neither the frequency of face-to-face meeting nor the frequency of contact via other communication channels is statistically significant in middle-aged women and men. Therefore the results reject the two sub-hypotheses on the positive association between the frequency of the

face-to-face contact with adult children (hypothesis 2-1) as well as the frequency of the contact with adult children by telephone or (e)mail (hypothesis 2-2) and the degree of happiness of middle-aged women and men. This implies that associational solidarity is not a significantly influential determinant of the degree of happiness of middle-aged women and men.

By contrast, the second hypothesis is supported in both older women and men: the stronger the associational solidarity, the higher the degree of happiness of older women and men. However, the detailed picture is not homogeneous. In other words, among indicators of associational solidarity, only the frequency of contact via other communication channels significantly determines the degree of happiness in both older women and men. Therefore hypothesis 2-1, namely the more frequent the face-to-face contact with adult children, the higher the degree of happiness of older women and men, is rejected. In contrast, hypothesis 2-2, namely the more frequent the contact with adult children via telephone or (e)mail, the higher the degree of happiness of older women and men, is supported. This generally means that older women and men who have more contact with their first adult child are happier than those who have fewer contacts. It should be noted that the greater significance of the frequency of contact via other communication channels with the first adult child than with any other adult children supports the South Korean older people's conventional familial values. In other words, the result confirms the fact that the older generation puts more emphasis on the first rather than other adult children, based on traditional Confucian familism.

The fact that none of the middle-aged people groups is affected by any type of associational solidarity is probably the result of stronger individualism among middle-aged people than older people after industrialization (Chamber, 2006; MGEF, 2005). In other words, historical evidence that as societies industrialized, individualism

emphasizing the self rather than interdependence rises while collective familism decreases (Parsons, 1943, 1951; Myers, 1999; Beck-Gernsheim, 2002; Ritzer and Goodman, 2004; Hofstede and Hofstede, 2005) tells us that relatively more older people than individualized middle-aged people are likely to be affected by familism or associational solidarity in contemporary South Korea.

Moreover, the result that none of the older people groups are significantly affected by the frequency of face-to-face meeting is contradictory to South Korean family relations. In other words, almost all South Korean parents lay an emphasis on face-to-face meeting in person as a 'thick' association rather than a 'thin' association, such as contact with their adult children simply via other communication channels (Chambers, 2006; Kim and Choi, 2000; Kim, 1994). This may be attributable to the changed South Korean family culture after the extended family structure collapsed as a result of industrialization. The modern relationship between adult children and their parents in South Korea is restructured as more individualistic than before (Cho, 2004).

The significantly powerful role of the frequency of contact via other communication channels in determining the degree of happiness both of older women and men rather than middle-aged people implies that older people, in general, are more affected by more frequent exchange of dialogue with their adult children than middle-aged people. This can perhaps be explained by the role of contact on happiness in later life. Scheff (1994) maintains the following:

“It seems that there is a virtually invisible thread connecting each of us to others. We are interdependent not only in the sense that our physical survival depends upon others to protect us from starvation and exposure but also in the emotional sense that we need to feel connected.” (Scheff, 1994: 51)

In other words, many studies showed that frequent contact can increase the level of happiness not only by increasing positive elements but also by decreasing negative elements. For example, on the one hand, Hagestad (1982), Hirschman (1996) and Bruni and Stanca (2005) reported that frequent contact with those who have a close relationship provides comfort and pleasure and thus will significantly increase the degree of happiness. On the other hand, Putnam (2000), Berkman and Glass (2000), Cohen and Herbert (1996), and Myers and Diener (1995) explained that close ties can play a key role in buffering the effects of negative incidents as well as enhancing 'the social connectedness' which is the significantly influential factor in the happiness of human beings.

Table 8.4 Association between Associational Solidarity and Happiness of Middle-aged and Older People by Gender

Independent Variables			Socio-demographic Status			Socio-economic Status					Health Condition					Constant (SE)	R ² (ΔR ²)	F
			Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having=1)	House (having=1)	Physical Health		Mental Health		Subjective Health			
											ADL (log)	IADL (log)	Depression (log)					
F M A P	M 1	B (SE) β	-.223 (.182) -.064	9.336 (2.653) .185***	3.645 (1.912) .099											64.691 (10.529)	.050	6.17 ***
	M 2	B (SE) β	-.021 (.199) -.006	6.993 (2.615) .138**	3.359 (1.858) .092	2.942 (1.047) .161**	.350 (1.996) .010	1.408 (1.068) .074	2.372 (3.048) .040	9.432 (2.320) .209***						39.124 (12.607)	.129 (.079) ***	6.4 ***
	M 3	B (SE) β	-.139 (.177) -.040	5.505 (2.322) .109**	2.140 (1.651) .058	1.388 (.940) .076**	2.005 (1.779) .055	.804 (.948) .092	1.544 (2.698) .026	6.941 (2.070) .154**	-2.056 (3.414) -.047	-.522 (1.798) -.023	-3.666 (1.628) -.111***	.372 (.045) .414***		22.600 (11.835)	.327 (.198) ***	13.86 ***
	M 4	B (SE) β	-.119 (.205) -.034	5.249 (2.425) .104*	2.115 (1.672) .058	1.537 (.994) .084**	1.985 (1.809) .055	.798 (.959) .042	1.439 (2.723) .024	6.583 (2.105) .146**	-1.913 (3.446) -.043	-.437 (1.817) -.019	-3.779 (1.650) -.115**	.376 (.045) .419**				
	M 5	B (SE) β	-.099 (.203) -.029	3.969 (2.444) .078*	1.834 (1.672) .050	1.628 (.992) .089**	1.918 (1.799) .053	.804 (.956) .042	1.162 (2.716) .020	5.525 (2.129) .123*	-1.603 (3.442) -.036	-.026 (1.818) -.001	-3.320 (1.659) -.101**	.351 (.046) .391**				
M M A P	M 1	B (SE) β	-.076 (.220) -.021	23.166 (4.301) .336***	4.114 (2.325) .110											45.147 (12.592)	.131	11.32 ***
	M 2	B (SE) β	-.369 (.231) -.104	14.783 (4.290) .214**	4.049 (2.196) .109	2.131 (1.211) .115**	6.222 (2.953) .136***	2.117 (1.245) .120***	5.202 (2.402) .141	5.575 (2.803) .122***						3.959 (14.610)	.250 (.119) ***	9.21 ***
	M 3	B (SE) β	-.358 (.205) -.101	11.345 (3.862) .164*	2.975 (1.965) .080	1.365 (1.083) .074**	1.337 (2.746) .029**	1.118 (1.115) .063**	3.378 (2.152) .091	4.421 (2.499) .097**	-.695 (2.029) -.025	-1.113 (1.049) -.082	-2.810 (2.275) -.071***	.356 (.054) .400***		.528 (13.923)	.417 (.167) ***	12.92 ***
	M 4	B (SE) β	.319 (.248) .090	10.587 (4.087) .153*	3.049 (2.017) .082	1.408 (1.117) .076*	1.219 (2.817) .027*	1.144 (1.146) .065*	3.428 (2.199) .093	4.181 (2.566) .092*	-.650 (2.071) -.024	-1.098 (1.074) -.081	-2.767 (2.326) -.070**	.357 (.055) .402**				
	M 5	B (SE) β	.279 (.247) .079	9.791 (4.159) .142*	2.613 (2.005) .070	1.126 (1.099) .061**	1.281 (2.816) .028*	.530 (1.139) .030*	2.721 (2.172) .074	3.621 (2.529) .079*	-.335 (2.033) -.012	-1.139 (1.055) -.084	-2.343 (2.298) -.059*	.328 (.055) .368*				
Independent Variables			Structural Solidarity			Functional Solidarity				Associational Solidarity								
			Number of Adult Children	Proximity (1 st)	Proximity (2 nd)	Proximity (3 rd)	Amount of Money Received from Adult Children (log)	Financial Support to Adult Children (provided=1)	Non-financial Support from Adult Children (received=1)	Non-financial Support to Adult Children (provided=1)	Meeting (1 st)	Meeting (2 nd)	Meeting (3 rd)	Contacting (1 st , log)	Contacting (2 nd , log)	Contacting (3 rd , log)		
F M A P	M 4	B (SE) β	.552 (.912) .031	-.032 (.788) -.002	1.118 (.826) .072	-.817 (.832) -.051	-.054 (.764) -.003	-1.007 (2.021) -.028	.575 (3.354) .008	.302 (2.098) .008						21.502 (14.257)	.332 (.005)	8.32 ***
	M 5	B (SE) β	1.036 (.925) .059	.117 (1.048) .007	1.751 (1.065) .113	.362 (1.055) .023	-.629 (.782) -.040	-1.457 (2.017) -.040	1.023 (3.337) .014	.179 (2.096) .005	.063 (.606) .008	-.581 (.611) -.068	-.972 (.618) -.107	-.796 (.636) -.078	.333 (.664) .033	-.460 (.644) -.045	31.290 (14.452)	.355 (.023)
M M A P	M 4	B (SE) β	.739 (1.228) .037	.121 (.961) .008	.416 (1.040) .026	-.304 (1.027) -.018	-.102 (.916) -.006	-.192 (2.495) -.005	.418 (4.471) .005	-.454 (2.816) -.011						1.213 (18.162)	.418 (002)	7.52 ***
	M 5	B (SE) β	1.342 (1.240) .068	.907 (1.260) .056	-.117 (1.324) -.007	1.594 (1.203) .096	-.694 (.938) -.043	-1.284 (2.478) -.035	1.476 (4.407) .018	1.159 (2.795) .027	-.309 (.730) -.035	.695 (.781) .079	-1.913 (.734) -.202	1.191 (.741) -.120	.278 (.782) .028	-.370 (.797) -.035	14.310 (18.562)	.458 (040)

Table 8.4 Association between Associational Solidarity and Happiness of Middle-aged and Older People by Gender (continued)

Independent Variables			Socio-demographic Status			Socio-economic Status					Health Condition				Constant (SE)	R ² (ΔR ²)	F
			Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having=1)	House (having=1)	Physical Health		Mental Health	Subjective Health			
											ADL (log)	IADL (log)	Depression (log)				
F O P	M 1	B (SE) β	-.186 (.095) -.063	3.790 (1.294) .094	2.128 (1.199) .052**									65.823 (7.406)	.021	8.00 ***	
	M 2	B (SE) β	-.167 (.096) -.057	1.860 (1.279) .046	1.702 (1.158) .042*	3.846 (1.004) .112***	2.765 (1.744) .049	-.974 (.591) -.051	10.244 (4.590) .063	12.125 (1.444) .239***				52.546 (8.049)	.100 (.080) ***	15.85 ***	
	M 3	B (SE) β	-.041 (.082) -.014	1.615 (1.044) .040	.255 (.948) .006*	.662 (.830) .019**	-.696 (1.432) -.012	-.700 (.485) -.037	8.296 (3.745) .051	7.593 (1.193) .150**	-.704 (.582) -.042*	-.198 (.297) -.025*	-3.756 (.784) -.126***	-.456 (.024) .503***	36.852 (6.949)	.404 (.303) ***	63.89 ***
	M 4	B (SE) β	-.013 (.083) -.004	1.264 (1.060) .031	.429 (.950) .011*	.465 (.831) .014**	-.450 (1.430) -.008	-.993 (.499) -.052	8.021 (3.735) .050	6.796 (1.219) .134**	-.738 (.580) -.044*	-.213 (.296) -.027*	-3.735 (.782) -.125***	.453 (.024) .500**			
	M 5	B (SE) β	-.030 (.084) -.010	1.687 (1.070) .042	.396 (.947) .010*	.475 (.833) .014*	-.060 (1.497) -.001	-.775 (.509) -.041	7.433 (3.723) .046	6.546 (1.220) .129*	-.769 (.577) -.046*	-.280 (.295) -.035*	-3.697 (.778) -.124**	.446 (.024) .493**			
	M 6	B (SE) β	.006 (.084) .002	1.112 (1.067) .028	.528 (.943) .013*	.428 (.825) .013*	-.155 (1.486) -.003	-.601 (.506) -.031	6.988 (3.695) .043	5.711 (1.217) .112*	-.834 (.571) -.050*	-.346 (.292) -.043*	-3.387 (.773) -.114**	.438 (.024) .484*			
M O P	M 1	B (SE) β	-.362 (.101) -.113	4.103 (1.985) .065	3.607 (1.222) .093***									79.902 (7.872)	.030	10.13 ***	
	M 2	B (SE) β	-.004 (.105) -.001	2.302 (1.870) .037	2.993 (1.154) .077**	2.469 (.545) .141***	1.687 (1.405) .041	1.841 (.607) .106	6.547 (1.545) .135***	11.345 (1.570) .215***				34.146 (8.781)	.152 (.122) ***	22.16 ***	
	M 3	B (SE) β	.221 (.089) .069	2.659 (1.562) .042	.826 (.964) .021**	1.009 (.459) .063**	-1.604 (1.179) -.039	1.069 (.508) .062	4.289 (1.289) .088**	8.038 (1.315) .152**	-.744 (.608) -.051*	-.716 (.341) -.090**	-2.315 (.915) -.071***	.386 (.026) .450***	11.390 (7.593)	.417 (.265) ***	58.74 ***
	M 4	B (SE) β	.285 (.092) .089	2.555 (1.557) .041	.931 (.961) .024**	1.058 (.461) .061*	-1.554 (1.176) -.038	.719 (.520) .041	4.046 (1.286) .083*	7.138 (1.347) .135*	-.825 (.606) -.056*	-.697 (.340) -.088**	-2.222 (.912) -.068**	-.385 (.026) .448**			
	M 5	B (SE) β	.224 (.100) .070	3.010 (1.561) .048	.820 (.960) .021*	.821 (.472) .047*	-1.522 (1.208) -.037	.812 (.519) .047	4.051 (1.282) .083**	7.084 (1.354) .134*	-.772 (.605) -.052*	-.691 (.338) -.087*	-2.039 (.912) -.063*	.382 (.026) .445**			
	M 6	B (SE) β	.262 (.100) .082	2.128 (1.564) .034	.506 (.955) .013*	.851 (.469) .049*	-1.592 (1.198) -.039	.806 (.517) .046	4.182 (1.273) .086*	6.255 (1.371) .119*	-.960 (.601) -.065*	-.606 (.336) -.076*	-1.938 (.907) -.060*	.373 (.026) .434**			

Table 8.4 Association between Associational Solidarity and Happiness of Middle-aged and Older People by Gender (continued)

Independent Variables			Public Pensions		Structural Solidarity			Functional Solidarity				Associational Solidarity						Constant (SE)	R ² (ΔR ²)	F	
			NPS (received =1)	BOAP (received =1)	Number of Adult Children	Geographical Proximity (1 st Child)	Geographical Proximity (2 nd Child)	Geographical Proximity (3 rd Child)	Amount of Money Received from Adult Children (log)	Financial Support to Adult Children (provided =1)	Non-financial Support from Adult Children (received =1)	Non-financial Support to Adult Children (provided =1)	Face-to-face Meeting (1 st Child)	Face-to-face Meeting (2 nd Child)	Face-to-face Meeting (3 rd Child)	Contacting via other communication channels (1 st Child, log)	Contacting via other communication channels (2 nd Child, log)				Contacting via other communication channels (3 rd Child, log)
F O P	M 4	B (SE) β	.528 (1.685) .007	-2.975 (1.007) -.073*														37.612 (6.995)	.408 (.005) *	55.72 ***	
	M 5	B (SE) β	.648 (1.679) .009	-2.988 (1.001) -.074*	.709 (.300) .061*	.404 (.444) .023	.435 (.462) .024	-.879 (.450) -.049	1.286 (.431) .071**	1.130 (1.703) .017	3.751 (2.091) .041	-.404 (1.235) -.008						28.990 (7.559)	.421 (.013) **	37.09 ***	
	M 6	B (SE) β	.238 (1.664) .003	-2.457 (.996) -.061*	.953 (.301) .082*	.727 (.557) .041	.789 (.583) .044	-.099 (.579) .006	.821 (.435) .046**	.850 (1.686) .012	3.969 (2.069) .043	-1.020 (1.228) -.020	-.061 (.367) -.006	-.241 (.377) -.023	-.689 (.384) -.063	-.534 (.330) -.054*	-.237 (.335) -.024	-.504 (.325) -.049	33.459 (7.616)	.437 (.016) ***	30.94 ***
M O P	M 4	B (SE) β	1.963 (1.142) .045*	-2.764 (1.102) -.067*														8.976 (7.785)	.423 (.006) **	51.4 ***	
	M 5	B (SE) β	1.941 (1.141) .044*	-2.782 (1.098) -.068*	.127 (.351) .010*	-.838 (.449) -.050	-.511 (.468) .031	.400 (.476) .023	1.484 (.443) .086*	1.899 (2.021) .023	1.163 (1.153) .026	-1.467 (1.726) 0.021							7.044 (8.347)	.434 (.011) *	33.93 ***
	M 6	B (SE) β	1.810 (1.133) .041*	-2.601 (1.090) -.063*	.238 (.350) .019*	.185 (.571) .011	.254 (.619) .015	1.190 (.616) .070	1.176 (.447) .068**	1.902 (2.005) .023	.820 (1.147) .018	-1.446 (1.713) -.021	-.647 (.359) -.067	.529 (.387) .057	-1.069 (.376) -.106	-.525 (.343) -.053*	-.547 (.357) -.057	.433 (.345) .043	11.743 (8.389)	.448 (.014) ***	28.08 ***

Note: M (Model), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), NPS (National Pension Scheme), BOAP (Basic Old-Age Pension), *P<.05, **P<.01, ***P<.001

8.4. Functional Solidarity and Happiness in Later Life

8.4.1. Correlation between Functional Solidarity and Happiness in Later Life

On the basis of the third hypothesis, one can assume that financial and non-financial support from adult children for older parents as well as from older parents for adult children will increase the extent of happiness in later life. As table 8.5 shows, the correlation analysis between functional solidarity and happiness in later life partially supports the assumption. In other words, it seems that there is a negative relationship between financial and non-financial support received from adult children and the happiness both of middle-aged women and men whereas the relationship is the opposite in regard to providing financial and non-financial support for adult children. However, it appears that both receiving financial and non-financial support from adult children and providing financial and non-financial support to adult children will increase the happiness of older people. Is this simply the case? Unfortunately, we cannot tell from the correlation result because the analysis did not consider relevant variables that should be controlled. Therefore, this will be clarified by the hierarchical multiple regression in the next section.

Table 8.5 Correlation between Functional Solidarity and Happiness in Later Life by Gender

Happiness	Financial Aid (from Adult Children)	Non-financial Aid (from Adult Children)	Financial Aid (to Adult Children)	Non-financial Aid (to Adult Children)
FMAP	-.101 [*]	-.112 [*]	.146 [*]	.127 [*]
MMAP	-.104 [*]	-.112 [*]	.102 [*]	.111 [*]
FOP	.413 ^{**}	.144 [*]	.117 [*]	.105 [*]
MOP	.372 ^{**}	.116 [*]	.106 [*]	.108 [*]

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), **p<.01; *p<.05; 2-tailed, Full

information is given in appendix 10.

8.4.2. Comparison of the Association between Functional Solidarity and Happiness in Later Life by Gender

Table 8.6 summarizes the results of the hierarchical multiple regressions that evaluate the capacity of functional solidarity to forecast the degree of happiness of both middle-aged and older people by gender. We controlled for the effects of socio-demographic and economic status, health conditions, public pension systems including both the National Pension Scheme and Basic Old-Age Pension, and family support such as structural solidarity and associational solidarity. Basically, every model explains a different amount of variation of the happiness in both groups. In other words, the full model of middle-aged women and men explains 35.5 per cent and 45.8 per cent in the variance of happiness, respectively. The final model of older women and men accounts for 43.7 per cent and 44.8 per cent of the variance of happiness, respectively. In all regression models, the values of VIF are all below 10 and all values of tolerance are above 0.2 suggesting that there is no multicollinearity (Menard, 1995; Bowerman and O'Connell, 1990; Myers, 1990).

According to the regression analysis, the third hypothesis about the positive relationship between functional solidarity and happiness is not supported in middle-aged women and men. In other words, the amount of money received from adult children as well as providing them with financial support (hypothesis 3-1); and receiving non-financial support from adult children as well as providing non-financial support to adult children (hypothesis 3-2) are all rejected. This suggests that functional solidarity is not the critical factor for determining the level of happiness of both middle-aged women and

men.

By contrast, the third hypothesis is partially rejected in both older women and men. In other words, only the positive relationship between the amount of money received from adult children and happiness in later life (hypothesis 3-1) is supported while the other hypothesis is not supported. This generally means that both older women and men who received a greater amount of money from their adult children are happier than those who received less from them. Consequently, the result implies that only financial functional solidarity in terms of the amount of money received from adult children is the significantly critical factor determining the level of happiness of both older women and men.

This might be because the financial transfer from their adult children can increase the income security of older people (Lillard and Willis, 1997). Several previous studies, such as Ferrer-i-Carbonell and Frijters (2004) and Nilsson, Rana, and Kabir (2006), also found a consistent result. The positive effect of financial support from their adult children may be relatively more significant for older people rather than middle-aged parents because the vast majority of older people are not employed and earning a regular income.

Furthermore, the result might be related to the fact that South Korean older parents have a relatively stronger perception of the normative value of Confucianism for filial piety. In other words, Confucianism for filial piety in South Korea teaches that children should have a strong sense of obligation towards their parents and practise it by supporting them when they get old as mentioned in chapter 3. At the same time, older parents usually expect filial piety from their children (Doling and Ronald, 2011).

Regarding this point, Arber and Timonen (2012) provide a profound insight:

“Tensions and ambivalences were revealed, with grandparents expressing resentment that they were treated like ‘domestic workers’, and not accorded the traditional respect (as a manifestation of filial piety) that should be accorded to elders.” (Arber and Timonen, 2012: 255)

In other words, financial aid from their adult children might satisfy the normative expectation of older parents and bring about a positive mood, making older parents feel they are treated well by their children. Moreover, performing the normative rule can satisfy older parents’ expectation to their adult children. Put it another way, as South Korean Confucianism also teaches that children should be polite by respecting and obeying their seniors, adhering to cultural norms by practising filial piety can make older parents think that their adult children are polite to them. Therefore, it is unequivocal that the possibility of increasing positive emotion of older parents who receive the filial piety is probably higher than those do not.

Table 8.6 Association between Functional Solidarity and Happiness of Middle-aged and Older People by Gender

Independent Variables			Socio-demographic Status			Socio-economic Status					Health Condition				Constant (SE)	R ² (ΔR ²)	F	
			Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having=1)	House (having=1)	Physical Health		Mental Health	Subjective Health				
											ADL (log)	IADL (log)	Depression (log)					
F M A P	M 1	B (SE) β	-.223 (.182) -.064	9.336 (2.653) .185***	3.645 (1.912) .099										64.691 (10.529)	.050	6.17 ***	
	M 2	B (SE) β	-.021 (.199) -.006	6.993 (2.615) .138**	3.359 (1.858) .092	2.942 (1.047) .161**	.350 (1.996) .010	1.408 (1.068) .074	2.372 (3.048) .040	9.432 (2.320) .209***					39.124 (12.607)	.129 (.079) ***	6.4 ***	
	M 3	B (SE) β	-.139 (.177) -.040	5.505 (2.322) .109**	2.140 (1.651) .058	1.388 (.940) .076**	2.005 (1.779) .055	.804 (.948) .042	1.544 (2.070) .154**	6.941 (2.070) .154**	-2.056 (3.414) -.047	-.522 (1.798) -.023	-3.666 (1.628) -.111***	.372 (.045) .414***	22.600 (11.835)	.327 (.198) ***	13.86 ***	
	M 4	B (SE) β	-.117 (.185) -.034	4.485 (2.349) .089*	1.859 (1.664) .051	1.399 (.963) .076**	1.885 (1.776) .052	.824 (.951) .043	1.182 (2.703) .020	5.663 (2.115) .126**	-1.692 (3.425) -.038	-.033 (1.807) -.001	-3.340 (1.650) -.101**	.353 (.045) .393**				
	M 5	B (SE) β	-.099 (.203) -.029	3.969 (2.444) .078*	1.834 (1.672) .050	1.628 (.992) .089**	1.918 (1.799) .053	.804 (.956) .042	1.162 (2.716) .020	5.525 (2.129) .123*	-1.603 (3.442) -.036	-.026 (1.818) -.001	-3.320 (1.659) -.101**	.351 (.046) .391**				
M M A P	M 1	B (SE) β	-.076 (.220) -.021	23.166 (4.301) .336***	4.114 (2.325) .110										45.147 (12.592)	.131	11.32 ***	
	M 2	B (SE) β	-.369 (.231) -.104	14.783 (4.290) .214**	4.049 (2.196) .109	2.131 (2.111) .115**	6.222 (2.953) .136***	2.117 (1.245) .120***	5.202 (2.402) .141	5.575 (2.803) .122***					3.959 (14.610)	.250 (.119) ***	9.21 ***	
	M 3	B (SE) β	-.358 (.205) -.101	11.345 (3.862) .164**	2.975 (1.965) .080	1.365 (1.083) .074**	1.337 (2.746) .029**	1.118 (1.115) .063**	3.378 (2.152) .091	4.421 (2.499) .097**	-.695 (2.029) -.025	-1.113 (1.049) -.082	-2.810 (2.275) -.071***	.356 (.054) .400***	.528 (13.923)	.417 (.167) ***	12.92 ***	
	M 4	B (SE) β	.280 (.220) .079	10.258 (4.070) .149*	2.648 (1.987) .071	1.073 (1.083) .058*	1.495 (2.773) .033*	.555 (1.121) .031*	2.751 (2.154) .074	3.779 (2.504) .083*	-2.273 (2.015) -.010	-1.103 (1.046) -.081	-2.468 (2.273) -.062**	.327 (.054) .368**				
	M 5	B (SE) β	.279 (.247) .079	9.791 (4.159) .142*	2.613 (2.005) .070	1.126 (1.099) .061**	1.281 (2.816) .028*	.530 (1.139) .030*	2.721 (2.172) .074	3.621 (2.529) .079*	-.335 (2.033) -.012	-1.139 (1.055) -.084	-2.343 (2.298) -.059*	.328 (.055) .368*				
Independent Variables			Structural Solidarity			Associational Solidarity					Functional Solidarity							
			Number of Adult Children	Proximity (1 st)	Proximity (2 nd)	Proximity (3 rd)	Meeting (1 st)	Meeting (2 nd)	Meeting (3 rd)	Contacting (1 st , log)	Contacting (2 nd , log)	Contacting (3 rd , log)	Amount of Money Received From Adult Children (log)	Financial Support To Adult Children (provided =1)	Non-financial Support from Adult Children (received =1)	Non-financial Support To Adult Children (provided =1)		
F M A P	M 4	B (SE) β	.967 (.874) .055	.032 (1.039) .002	1.658 (1.051) .107	.303 (1.048) .019	.099 (.602) .012	-.580 (.608) -.068	-.908 (.608) -.100	-.783 (.632) -.077	.349 (.660) .035	-.403 (.633) -.039				28.949 (12.678)	.352 (.026)	8.23 ***
	M 5	B (SE) β	1.036 (.925) .059	.117 (1.048) .007	1.751 (1.065) .113	.362 (1.055) .023	.063 (.606) .008	-.581 (.611) -.068	-.972 (.618) -.107	-.796 (.636) -.078	.333 (.664) .038	-.460 (.644) -.045	-.629 (.782) -.040	-1.457 (2.017) -.040	1.023 (3.337) .014	.179 (2.096) .005	31.290 (14.452)	.355 (.002)
M M A P	M 4	B (SE) β	1.091 (1.155) .055	.807 (1.241) .050	-.222 (1.065) -.014	1.617 (1.192) .098	-.267 (.721) -.030	.703 (.769) .080	-1.913 (1.192) -.202	-1.118 (.731) -.112	.268 (.772) .027	-.260 (.775) -.025				13.958 (15.864)	.456 (.039)	7.89 ***
	M 5	B (SE) β	1.342 (1.240) .068	.907 (1.260) .056	-.117 (1.324) -.007	1.594 (1.203) .096	-.309 (.730) -.035	.695 (.781) .079	-1.913 (1.734) -.202	-1.191 (.741) -.120	.278 (.782) .028	-.370 (.797) -.035	-.694 (.938) -.043	-1.284 (2.478) -.035	1.467 (4.407) .018	1.159 (2.795) .027	14.310 (18.562)	.458 (.002)

Table 8.6 Association between Functional Solidarity and Happiness of Middle-aged and Older People by Gender (continued)

Independent Variables			Socio-demographic Status			Socio-economic Status					Health Condition				Constant (SE)	R ² (ΔR ²)	F
			Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having=1)	House (having=1)	Physical Health		Mental Health	Subjective Health			
											ADL (log)	IADL (log)	Depression (log)				
F O P	M 1	B (SE) β	-.186 (.095) -.063	3.790 (1.294) .094	2.128 (1.199) .052**									65.823 (7.406)	.021	8.00 ***	
	M 2	B (SE) β	-.167 (.096) -.057	1.860 (1.279) .046	1.702 (1.158) .042*	3.846 (1.004) .112***	2.765 (1.744) .049	-.974 (.591) -.051	10.244 (4.590) .063	12.125 (1.444) .239***				52.546 (8.049)	.100 (.080) ***	15.85 ***	
	M 3	B (SE) β	-.041 (.082) -.014	1.615 (1.044) .040	.255 (.948) .006*	.662 (.830) .019**	-.696 (1.432) -.012	-.700 (.485) -.037	8.296 (3.745) .051	7.593 (1.193) .150**	-.704 (.582) -.042*	-.198 (.297) -.025*	-3.756 (.784) -.126***	.456 (.024) .503***	36.852 (6.949)	.404 (.303) ***	63.89 ***
	M 4	B (SE) β	-.013 (.083) -.004	1.264 (1.060) .031	.429 (.950) .011*	.465 (.831) .014**	-.450 (1.430) -.008	-.993 (.499) -.052	8.021 (3.735) .050	6.796 (1.219) .134**	-.738 (.580) -.044*	-.213 (.296) -.027*	-3.735 (.782) -.125***	.453 (.024) .500**			
	M 5	B (SE) β	-.003 (.083) -.001	.633 (1.050) .016	.587 (.943) .014*	.552 (.822) .016*	-.977 (1.426) -.017	-.558 (.505) -.029	6.989 (3.693) .043	5.633 (1.218) .111*	-.823 (.571) -.049*	-.338 (.292) -.042*	-3.374 (.773) -.113**	.442 (.024) .489**			
	M 6	B (SE) β	.006 (.084) .002	1.112 (1.067) .028	.528 (.943) .013*	.428 (.825) .013*	-.155 (1.486) -.003	-.601 (.506) -.031	6.988 (3.695) .043	5.711 (1.217) .112*	-.834 (.571) -.050*	-.346 (.292) -.043*	-3.387 (.773) -.114**	.438 (.024) .484*			
M O P	M 1	B (SE) β	-.362 (.101) -.113	4.103 (1.985) .065	3.607 (1.222) .093***									79.902 (7.872)	.030	10.13 ***	
	M 2	B (SE) β	-.004 (.105) -.001	2.302 (1.870) .037	2.993 (1.154) .077**	2.469 (.545) .141***	1.687 (1.405) .041	1.841 (.607) .106	6.547 (1.545) .135***	11.345 (1.570) .215***				34.146 (8.781)	.152 (.122) ***	22.16 ***	
	M 3	B (SE) β	.221 (.089) .069	2.659 (1.562) .042	.826 (.964) .021**	1.099 (.459) .063**	-1.604 (1.179) -.039	1.069 (.508) .062	4.289 (1.289) .088**	8.038 (1.315) .152**	-.744 (.608) -.051*	-.716 (.341) -.090**	-2.315 (.915) -.071***	.386 (.026) .450***	11.390 (7.593)	.417 (.265) ***	58.74 ***
	M 4	B (SE) β	.285 (.092) .089	2.555 (1.557) .041	.931 (.961) .024**	1.058 (.461) .061*	-1.554 (1.176) -.038	.719 (.520) .041	4.046 (1.286) .083*	7.138 (1.347) .135*	-.825 (.606) -.058*	-.697 (.340) -.088**	-2.222 (.912) -.068**	.385 (.026) .448**			
	M 5	B (SE) β	.280 (.100) .087	1.629 (1.555) .026	.564 (.955) .014*	1.059 (.460) .061*	-1.817 (1.172) -.044	.716 (.517) .041	4.162 (1.274) .086**	6.068 (1.371) .115*	-.959 (.602) -.065*	-.612 (.337) -.077*	-2.093 (.907) -.065*	.375 (.026) .436**			
	M 6	B (SE) β	.262 (.100) .082	2.128 (1.564) .034	.506 (.955) .013*	.851 (.469) .049*	-1.592 (1.198) -.039	.806 (.517) .046	4.182 (1.273) .086*	6.255 (1.371) .119*	-.960 (.601) -.065*	-.606 (.336) -.076*	-1.938 (.907) -.060*	.373 (.026) .434**			

Table 8.6 Association between Functional Solidarity and Happiness of Middle-aged and Older People by Gender (continued)

Independent Variables			Public Pensions		Structural Solidarity			Associational Solidarity						Functional Solidarity			Constant (SE)	R ² (ΔR ²)	F	
			NPS (received =1)	BOAP (received =1)	Number of Adult Children	Geographical Proximity (1 st Child)	Geographical Proximity (2 nd Child)	Geographical Proximity (3 rd Child)	Face-to-face Meeting (1 st Child)	Face-to-face Meeting (2 nd Child)	Face-to-face Meeting (3 rd Child)	Contacting via other communication channels (1 st Child, log)	Contacting via other communication channels (2 nd Child, log)	Contacting via other communication channels (3 rd Child, log)	Amount of Money Received From Adult Children (log)	Financial Support to Adult Children (provided =1)				Non-financial Support from Adult Children (received =1)
F O P	M 4	B (SE) β	.528 (1.685) .007	-2.975 (1.007) -.073*														37.612 (6.995)	.408 (.005) *	55.72 ***
	M 5	B (SE) β	.039 (1.665) .001	-2.428 (.997) -.060*	1.015 (.283) .087***	.727 (.556) .041	.760 (.583) .042	.196 (.578) .011	-.093 (.366) -.009	-.218 (.377) -.021	-.729 (.383) -.067	-.522 (.329) -.053*	-.286 (.335) -.029	-.528 (.326) -.052				39.859 (7.125)	.433 (.024) ***	35.62 ***
	M 6	B (SE) β	-.238 (1.664) .003	-2.457 (.996) -.061*	.953 (.301) .082*	.727 (.557) .041	.789 (.583) .044	.099 (.579) .006	-.061 (.367) -.006	-.241 (.377) -.023	-.689 (.384) -.063	-.534 (.330) -.054*	-.237 (.335) -.024	-.504 (.325) -.049	.821 (.435) .046**	3.969 (2.069) .043	-1.020 (1.228) -.020	.850 (1.686) .012	33.459 (7.616)	.437 (.004) **
M O P	M 4	B (SE) β	1.963 (1.142) .045*	-2.764 (1.102) -.067*														8.976 (7.785)	.423 (.006) **	51.4 ***
	M 5	B (SE) β	1.655 (1.135) .038*	-2.557 (1.092) -.062*	.408 (.342) .032**	.262 (.571) .016	.353 (.616) .021	1.227 (.616) .072	-.691 (.359) -.072	.485 (.386) .052	-1.138 (.376) -.113	-.549 (.344) -.056*	-.587 (.358) -.061	.429 (.345) .043				15.796 (8.061)	.443 (.020) ***	32.22 ***
	M 6	B (SE) β	1.810 (1.133) .041*	-2.601 (1.090) -.063*	.238 (.350) .019*	.185 (.571) .011	.254 (.619) .015	1.190 (.616) .070	-.647 (.359) -.067	.529 (.387) .057	-1.069 (.376) -.106	-.525 (.343) -.053*	-.547 (.357) -.057	.433 (.345) .043	1.176 (.447) .068**	1.902 (2.005) .023	.820 (1.147) .018	-1.446 (1.713) -.021	11.743 (8.389)	.448 (.005) **

Note: M (Model), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), NPS (National Pension Scheme), BOAP (Basic Old-Age Pension), *P<.05, **P<.01, ***P<.001

8.5. Conclusion

This chapter addressed the second research question, asking what specific dimensions of intergenerational solidarity, particularly structural solidarity, associational solidarity, and functional solidarity significantly determine the degree of happiness in later life by gender in contemporary South Korea. Three specific dimensions were addressed by testing six research hypotheses, namely from hypotheses 1-1 to 3-2.

Specifically, regarding the impact of the structural solidarity, the first sub-hypothesis, no significant relationship between the number of adult children and happiness in later life (hypothesis 1-1), is supported in both middle-aged women and men while it is rejected in both older women and men. By contrast, the second sub-hypothesis, i.e. a positive relationship between geographical proximity of adult children and happiness in later life (hypothesis 1-2), is rejected in both middle-aged women and men as well as in both older women and men.

The result reflects that structural solidarity in terms of the number of adult children is not a significant determinant of the happiness of both middle-aged women and men whereas it is a significant determinant of the happiness of both older women and men. This means that both older women and men who have more adult children are happier than those who have fewer adult children. This is probably attributable to the fact that South Korean older people hold relatively stronger Confucianistic views on fecundity as a source of great family happiness than middle-aged people. The result also shows that structural solidarity in terms of geographical proximity is not a significant determinant of the happiness of both middle-aged women and men or of older women and men. This is probably partially attributable to the developed telecommunication technology in place after the modernization of South Korea. In other words, technological development

allows people to maintain real-time intimate relationships, i.e. ‘freedom from spatial borderline’ or ‘immediate and decentralized connections’.

When it comes to the impact of associational solidarity, the first sub-hypothesis, i.e. a positive association between the frequency of face-to-face meeting and the happiness in later life (hypothesis 2-1), is rejected not only in middle-aged men and women but also older men and women. The second sub-hypothesis, namely a positive association between the frequency of contact via other communication channels and the happiness in later life (hypothesis 2-2), is rejected in both middle-aged women and men while it is supported in both older women and men.

This reflects that associational solidarity is not a critical determinant of the happiness of middle-aged men and women whereas associational solidarity in terms of the frequency of contact with adult children via other communication channels is an influential element of the happiness of older men and women. This means that both older women and men who have more contact with adult children are happier than those with fewer contacts with adult children. The result also confirms the fact that South Korean older parents lay greater emphasis on the frequency of contact via other communication channels with the first adult child than with any other adult children, based on conventional familial values. In other words, the result confirms the fact, based on the traditional Confucian familism, that older generations put more emphasis on the first rather than other adult children.

This is probably the result of stronger individualism among middle-aged people than older people after industrialization in South Korea as well as the role of contact on happiness in later life in buffering the effects of negative incidents while enhancing ‘the social connectedness’. Furthermore, the result that none of older people group is significantly affected by the frequency of face-to-face meeting is somewhat contradictory

in South Korean family relations because almost all South Korean parents lay an emphasis on face-to-face meeting as a ‘thick’ association rather than contact through other communication channels as a ‘thin’ association. This may be attributable to the changed South Korean family culture after the extended family structure had collapsed as a result of industrialization, i.e. the modern relationship between adult children and their parents in South Korea has since been restructured as more individualistic than before.

Regarding the impact of functional solidarity, the first sub-hypothesis stating that there is a positive association between the amount of financial support received from, and providing it to, adult children and happiness in later life (hypothesis 3-1) is rejected in both middle-aged women and men while it is supported in both older women and men. However, the second sub-hypothesis, i.e. a positive association between receiving non-financial support from adult children and providing it to adult children, and happiness in later life (hypothesis 3-2), is not supported not only in middle-aged men and women but also in older men and women.

The result implies that functional solidarity in terms of non-financial support is not a significant determinant of the happiness of both middle-aged and older people, while functional solidarity in terms of financial support is the critical factor for determining the level of happiness of both older men and women. This means that both older men and women who received a bigger amount of financial support from their adult children are happier than those who received less. This might be attributable to the fact that financial transfer can increase the income security of older people. The positive effect of financial support from their adult children could be relatively more influential for older people rather than middle-aged parents because the vast majority of older people are not employed. It is also possibly because financial aid from their adult children may satisfy the normative expectation of Confucianism for filial piety of older parents in

South Korea.

So far, we have analyzed the impact of family support on happiness in later life by gender in contemporary South Korea. Generally, empirical results show that family support still plays a very important role in late-life happiness in contemporary South Korea even if the role of the traditional family support system has decreased owing to the huge demographic transitions that followed industrialization.

The analysis of the impact of another dimension of late-life happiness, namely the influence both of the National Pension Scheme and the Basic Old-Age Pension on happiness in later life, will be dealt with in the next chapter.

Chapter 9

The Dynamics of the Impact of Public Pension Systems on Happiness in Later Life

9.1. Introduction

Following the analysis of the impact of the family support on happiness in later life in the previous chapter, this chapter aims to address the third research question on how significantly public pension systems are associated with the degree of the happiness of older people in contemporary South Korea. For this, two specific research hypotheses on the associations between the National Pension Scheme, the Basic Old-Age Pension, and happiness in later life were tested through the hierarchical multiple regressions by gender.

The analysis generally shows that hypothesis 4-1, stating that there is a positive association between receiving the National Pension Scheme benefit and the happiness of older people, is only supported in older men. However, hypothesis 4-2, i.e. a positive association between receiving the Basic Old-Age Pension benefit and the happiness of older people, is rejected in both older men and women.

In the following sections, the interpretations and implications of the results of the hypothesis test are explained. Then the chapter concludes with summarizing the key findings.

9.2. The National Pension Scheme and Happiness of Older People

9.2.1. Correlation between the National Pension Scheme and Happiness of Older People

Table 9.1 summarizes the correlation analysis between the National Pension Scheme and the happiness both of older women and men. The result partially supported the aforementioned fourth hypothesis stating that there is a positive relationship between the National Pension Scheme and happiness in later life (hypothesis 4-1). However, this

positive correlation cannot show how much happiness can be increased by receiving the National Pension Scheme since the correlation analysis can indicate just the direction. Moreover, it does not consider the relevant variables that should be controlled. Therefore the hierarchical multiple regression analysis is conducted in the next section.

Table 9.1 Correlation between the National Pension Scheme and Happiness of Older People by Gender

		Variables	1	2
Female Older People	1	Received National Pension Scheme Benefit	1	
	2	Happiness	.127**	1
Male Older People	1	Received National Pension Scheme Benefit	1	
	2	Happiness	.522**	1

Note: **p<.01; *p<.05; 2-tailed.

9.2.2. Comparison of the Association between the National Pension Scheme and Happiness of Older People by Gender

Table 9.2 summarizes the results of the hierarchical multiple regressions that evaluate the power of the receipt of the National Pension Scheme benefit to predict the level of happiness of both older women and men. For achieving more robust result, we controlled for the effects of socio-demographic and economic status, health conditions, and family support including structural solidarity, associational solidarity, and functional solidarity. Each model explains different extent of variation of happiness of both groups. In other words, the full model for older women and men accounts for 28.8 per cent and 33.6 per cent of the variance of happiness, respectively. Additionally, the values of VIF are all below 10 and all values of tolerance are above 0.2 meaning that there is no multicollinearity (Menard, 1995; Bowerman and O’Connell, 1990; Myers, 1990).

The final model verifies the hypothesis 4-1, i.e. that there is a positive

association between receiving the National Pension Scheme benefit and happiness in later life. It is rejected in older women whereas it is supported in older men. This means that older men who received the National Pension Scheme benefit are happier than those who did not receive it. It is a somewhat obvious result because receiving financial benefit will definitely increase the level of income security. The result also means that receiving the National Pension Scheme benefit is not a critical determinant of the happiness of older women but only of older men.

However, it is almost impossible to find first-hand previous studies testing the effect of the receipt of the pension benefit on the happiness of older people, but there are a few studies that explored the effect of the social welfare policy, particularly financial aid from the government, on the happiness of older people. For example Cheung and Leung (2007) reported a similar result with our result. They tested the hypothesis of the effects of the materialistic path of the social welfare policy on happiness. They studied 354 Chinese people aged 18 and over and living in Hong Kong in 2001 and found that the hypothesis was supported among older people. In other words, the government's social welfare policy increases the degree of happiness of older people through its financial effect.

Meanwhile, the fact that receiving the National Pension Scheme benefit is not the significant determinant of the happiness of older women in South Korea may be attributable to the inherent problem of the patriarchal structure of the scheme, similar to that in developed European welfare states. In other words, historically, the vast majority of European welfare states were based on patriarchal values when they made or reformed the welfare programmes (Bloom, Jimenez, and Rosenberg, 2012; Hatland, 2001; Lewis J, 1992). They took it for granted that almost all male adults would participate in the labour market whereas female adults work primarily in their household as a housekeeper

(Kollmeyer, 2012; Lewis J, 1998; Delphy and Leonard, 1992; Myles, 1989). The exemplary case is the national pension programme. In other words, the national pension programme is based on the strong male bread-winner model, which is characterized by full employment of males but less or low employment of females (Hausermann, 2010; Frericks and Maier, 2008; Ginn, 2004). Although it is not possible to set up welfare programmes based on a solely male bread-winner model, the pension scheme is relatively more dependent on the male bread-winner model than other welfare schemes (Stahlberg, Kruse, and Sunden, 2005).

The South Korean National Pension Scheme is also based on the strong male bread-winner model of the South Korean welfare state (Peng, 2009). In other words, in South Korea, women are in reality excluded from the National Pension Scheme because the structure of the country's labour market was originally constituted for men rather than women (Kang, 2007). For example, the wages earned by men are much greater than those of women, as women are more likely to be employed in temporary or part-time jobs, whereas men are more likely to be employed in full time positions. Moreover, the amount earned by men usually increases, at least until they reach their 50s, whereas women leave their jobs for childbearing, resulting in a permanent job loss or re-employment at a much lower level of salary than they earned previously. Therefore men can participate in the National Pension Scheme relatively more easily than women and are able to increase the amount of the National Pension Scheme benefit while women remain their dependants.

Table 9.2 Association between the National Pension Scheme and Happiness of Older People by Gender

Independent Variables		Socio-demographic Status			Socio-economic Status					Health Condition				Constant (SE)	R ² (ΔR ²)	F			
		Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having =1)	House (having =1)	Physical Health		Mental Health	Subjective Health						
										ADL (log)	IADL (log)	Depression (log)							
M 1	B (SE) β	-.218 (.067) -.085	3.987 (1.049) .100	2.215 (.963) .054**										68.175 (5.184)	.028	17.05 ***			
M 2	B (SE) β	-.124 (.068) -.049	2.456 (1.021) .061	1.763 (.931) .043**	3.353 (.695) .116***	2.215 (1.252) .042	.115 (.246) .011	6.946 (3.024) .053	12.285 (1.173) .239***					47.857 (5.621)	.105 (.077) ***	25.66 ***			
M 3	B (SE) β	.065 (.066) .025	2.393 (.936) .060	1.201 (.855) .029*	1.552 (.644) .054**	.295 (1.152) .006	-.184 (.226) -.017	5.253 (2.772) .040	9.906 (1.081) .193**	-1.195 (.568) -.066*	-.006 (.290) -.001*	-1.826 (.155) -.272***	4.315 (.554) .188***	37.486 (5.557)	.254 (.149) ***	49.46 ***			
M 4	B (SE) β	.075 (.067) .029	1.326 (.936) .033	1.275 (.847) .031*	1.896 (.644) .066**	-.034 (1.193) -.001	-.218 (.223) -.021	4.677 (2.736) .036	7.971 (1.090) .155**	-1.076 (.560) -.060*	-.058 (.285) -.007*	-1.688 (.154) -.252**	4.351 (.547) .189**						
M 5	B (SE) β	.077 (.068) .030	1.364 (.948) .034	1.264 (.848) .031*	1.888 (.645) .066*	-.030 (1.194) -.001	-.204 (.230) -.019	4.680 (2.737) .036	7.962 (1.091) .155*	-1.081 (.561) -.060*	-.059 (.285) -.007*	-1.689 (.154) -.252**	4.347 (.547) .189**						
Independent Variables		Structural Solidarity				Associational Solidarity					Functional Solidarity				National Pension Scheme Benefit (received =1)				
		Number of Adult Children	Geographical Proximity (1 st Child)	Geographical Proximity (2 nd Child)	Geographical Proximity (3 rd Child)	Face-to-face Meeting (1 st Child)	Face-to-face Meeting (2 nd Child)	Face-to-face Meeting (3 rd Child)	Contacting via other communication channels (1 st Child, log)	Contacting via other communication channels (2 nd Child, log)	Contacting via other communication channels (3 rd Child, log)	Amount of Money Received from Adult Children (log)	Financial Support to Adult Children (provided =1)	Non-financial Support from Adult Children (received =1)				Non-financial Support to Adult Children (provided =1)	
M 4	B (SE) β	1.027 (.281) .087**	.522 (.487) .030	.317 (.506) .018	.345 (.507) .019	-.296 (.490) -.019	-.377 (.498) -.024	-1.529 (.490) -.096	-1.052 (.579) -.049**	-.523 (.567) -.025	-1.375 (.575) -.061	.251 (.243) .022**	.543 (1.702) .008	-1.567 (1.004) -.036	2.272 (1.320) .045		40.728 (5.591)	.287 (.033) ***	26.84 ***
M 5	B (SE) β	1.027 (.281) .087**	.526 (.487) .030	.318 (.506) .018	.339 (.508) .019	-.299 (.490) -.019	-.376 (.498) -.024	-1.522 (.491) -.095	-1.051 (.580) -.049**	-.525 (.568) -.025	-1.376 (.575) -.061	.251 (.243) .022**	-.535 (1.703) -.008	-1.569 (1.005) -.036	2.262 (1.321) .045	.361 (1.438) .005	40.468 (5.688)	.288 (.001) ***	25.83 ***

Table 9.2 Association between the National Pension Scheme and Happiness of Older People by Gender (continued)

Independent Variables		Socio-demographic Status			Socio-economic Status					Health Condition				Constant (SE)	R ² (ΔR ²)	F			
		Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having =1)	House (having =1)	Physical Health		Mental Health	Subjective Health						
										ADL (log)	IADL (log)	Depression (log)							
M 1	B (SE) β	-.418 (.073) -.156	6.743 (1.778) .104	4.121 (1.047) .107**										81.567 (5.624)	.054	24.59 ***			
M 2	B (SE) β	-.079 (.078) -.029	4.246 (1.688) .065	3.529 (.990) .092**	2.907 (.470) .168***	4.151 (1.072) .107	.105 (.337) .008	6.764 (1.220) .157***	10.206 (1.367) .194***					42.492 (6.344)	.167 (.113) ***	32.31 ***			
M 3	B (SE) β	.116 (.073) .043	4.008 (1.557) .062	2.728 (.912) .071**	1.957 (.438) .113***	.889 (1.006) .023	.064 (.311) .005	5.126 (1.125) .119**	8.256 (1.262) .157**	-1.002 (.615) -.063*	-1.279 (.342) -.151**	-1.030 (.171) -.161***	3.372 (.587) .163***	29.634 (6.258)	.301 (.134) ***	46.05 ***			
M 4	B (SE) β	.096 (.081) .036	2.437 (1.565) .038	2.504 (.903) .065*	2.098 (.439) .121***	.230 (1.021) .006	.025 (.308) .002	5.408 (1.112) .125**	6.114 (1.292) .116**	-1.198 (.612) -.075*	-1.126 (.340) -.133*	-.952 (.171) -.148*	3.141 (.583) .152*						
M 5	B (SE) β	.136 (.083) .051	2.297 (1.564) .035	2.500 (.901) .065*	2.124 (.438) .123***	.187 (1.019) .005	.195 (.315) .015	5.246 (1.112) .121**	5.927 (1.292) .113*	-1.260 (.612) -.079*	-1.103 (.340) -.130*	-.936 (.171) -.146*	3.131 (.582) .151*						
Independent Variables		Structural Solidarity				Associational Solidarity					Functional Solidarity				National Pension Scheme Benefit (received =1)				
		Number of Adult Children	Geographical Proximity (1 st Child)	Geographical Proximity (2 nd Child)	Geographical Proximity (3 rd Child)	Face-to-face Meeting (1 st Child)	Face-to-face Meeting (2 nd Child)	Face-to-face Meeting (3 rd Child)	Contacting via other communication channels (1 st Child, log)	Contacting via other communication channels (2 nd Child, log)	Contacting via other communication channels (3 rd Child, log)	Amount of Money Received from Adult Children (log)	Financial Support to Adult Children (provided =1)	Non-financial Support from Adult Children (received =1)				Non-financial Support to Adult Children (provided =1)	
M 4	B (SE) β	.714 (.356) .056**	.530 (.522) .032	.157 (.562) .010	1.046 (.565) .062	-1.340 (.518) -.088	-.586 (.543) -.040	-1.657 (.520) -.109	-.467 (.674) -.021*	-1.538 (.696) -.069	-.300 (.663) -.013	.313 (.259) .030*	.671 (1.609) .011	-.980 (1.101) -.024	2.328 (1.267) .052		36.603 (6.538)	.331 (.029) ***	24.08 ***
M 5	B (SE) β	.670 (.356) .052*	.549 (.521) .033	.153 (.561) .009	1.028 (.564) .061	-1.319 (.517) -.087	.622 (.542) .042	-1.674 (.519) -.110	-.501 (.673) -.022*	-1.558 (.695) -.070	-.289 (.662) -.013	-.303 (.259) -.029*	-.649 (1.606) -.011	-.953 (1.099) -.023	2.234 (1.264) .052	2.531 (1.044) .059**	33.105 (6.683)	.336 (.005) *	23.49 ***

Note: M (Model), FOP (Female Older People), MOP (Male Older People), *P<.05, **P<.01, ***P<.001

9.3. The Basic Old-Age Pension and Happiness of Older People

9.3.1. Correlation between the Basic Old-Age Pension and Happiness of Older People

Table 9.3 summarizes the correlation analysis between the Basic Old-Age Pension and the happiness both of older men and women. It seems that the fourth hypothesis, namely that there is a positive association between receiving the Basic Old-Age Pension benefit and happiness in later life (hypothesis 4-2) is not supported. In other words, the extent of happiness of both older men and women will not be increased even if they receive the Basic Old-Age Pension benefit. This correlation analysis cannot tell to what extent happiness can be decreased by receiving the Basic Old-Age Pension benefit but can only show the direction of the downward movement. Furthermore, the analysis does not consider the relevant factors that should be controlled. At the next section, the hierarchical multiple regression analysis will clarify the opaque picture.

Table 9.3 Correlation between the Basic Old-Age Pension and Happiness of Older People by Gender

		Variables	1	2
Female Older People	1	Received Basic Old-Age Pension Benefit	1	
	2	Happiness	-.466**	1
Male Older People	1	Received Basic Old-Age Pension Benefit	1	
	2	Happiness	-.595**	1

Note: ** $p < .01$; * $p < .05$; 2-tailed.

9.3.2. Comparison of the Association between the Basic Old-Age Pension and Happiness of Older People by Gender

The table 9.4 summarizes the results of the hierarchical multiple regressions that evaluate

the power of the receipt of the Basic Old-Age Pension benefit to predict the degree of happiness of both older women and men. We controlled for the effects of socio-demographic and economic status, health conditions, and family support including structural solidarity, associational solidarity, and functional solidarity to forecast more robust result. Each model explains a different amount of variation in happiness of both older women and men. Specifically, the full models of both older women and men account for 43.7 per cent and 44.7 per cent, respectively, of the variance of happiness. Moreover, the values of VIF are all below 10, and all values of tolerance are above 0.2, suggesting that there is no multicollinearity (Menard, 1995; Bowerman and O'Connell, 1990; Myers, 1990).

According to the full model, hypothesis 4-2, stating that there is a positive association between receiving the Basic Old-Age Pension benefit and happiness in later life, is rejected in both older women and men. This surprising result, which completely refuted hypothesis 4-2, means that receiving the Basic Old-Age Pension benefit reduces the degree of happiness both of older women and men. Why, then, does the level of happiness of both older women and men decrease when they receive the Basic Old-Age Pension benefit from the government even if it is almost like a free cash handout for them? There might be two possible explanations for this surprising result.

The first possible explanation can be drawn from Feldstein's (1987) argument. He maintained that if the amount of benefit supplied by a means-tested pension programme is too little, it does not produce a better level of welfare for the recipients, as initially expected. Female and male recipients who already suffer economic impoverishment (only individuals below a certain income level can apply) are unlikely to experience any improvement in happiness as the amount of the Basic Old-Age Pension benefit is not enough to mitigate the general negative effect of impoverishment on the

happiness levels of the respondents. The amount of state provision is usually limited (Lillard and Willis, 1997), and the absolute amount of the Basic Old-Age Pension is too little (as explained in chapter 4). Consequently it is not easy to produce a fundamental change in the lives of the elderly (MHWFA and KIHSA, 2009). As the total amount of the Basic Old-Age Pension benefit is fixed at 5 per cent of average monthly income during the immediate three years before an individual's start date for receiving benefits from the National Pension Scheme, it is not efficient for minimizing economic impoverishment; essentially it functions as little more than a pocket allowance for the elderly.

The second possibility is involved with the structural failure of the Basic Old-Age Pension, namely that the means test possibly causes a negative effect on happiness in both female and male respondents. In other words, as Lipsky (1980) argued, means-tested welfare provision can lead to 'social stigma' in the recipient as a result of self-awareness and self-identification as occupying a lower social status while receiving financial handouts (Lewis M, 1998).

As table 9.5 illustrates below, for example, when the elderly receiving the Basic Old-Age Pension benefits are asked how they feel about receiving the provision, the vast majority (88.3 per cent) answered that they feel elderly. In other words, 39 per cent, 43 per cent, and 6.3 per cent, respectively, of beneficiaries of the Basic Old-Age Pension strongly agreed, agreed, and more or less agreed that they become older people. Moreover, 34.5 per cent of the elderly surveyed agreed that people regard them as poor. In other words, 5.6 per cent, 18 per cent, and 10.9 per cent of recipients of the Basic Old-Age Pension strongly agreed, pretty much agreed, and fairly agreed that they felt poor.

Considering the fact that the dignity of people is reduced when they are exposed to others in a negative way (Goffman, 1963; Spicker, 1984; Sayer, 2005a, 2005b) via constraining people's agency and capabilities (Sen, 2000), such that the awareness of

someone being perceived by others as belonging to a lower social class, results in feelings of deep shame – feelings that are evoked upon receiving the Basic Old-Age Pension benefit. Thus, these kinds of situations can possibly reduce their extent of happiness. This is because the feeling of shame as a negative emotion (Lazarus, 1993) directly produces not only a severely painful mood (Tangney and Dearing, 2002) but also an intense sense of self-defect (Poulson, 2000; Lewis M, 1992), thereby undermining any other positive emotion such as happiness (Gilbert, 1998).

Several studies also found a similar negative effect produced by the means test. For instance, Soss (2000) interviewed the beneficiaries of the AFDC (Aid to Families with Dependent Children) in the USA and found that means-tested welfare provision could degrade the recipients' identity and dignity through feelings of isolation, unworthiness, and social stigma. One of the interviewees expressed the emotional experience as follows:

“You feel like cattle or something being prodded. That’s how I felt...I was in a prison system...They’re the cowboys and you’re a cow...these people are like, “I’m helping you. This is something I’m doing for you.””
(Soss, 2000: 99)

Moreover, welfare programmes that apply the means test can stigmatize the recipients by asking them to provide private information and expose them to official scrutiny, thereby increasing feelings of vulnerability and helplessness – both feelings that can reduce individual levels of happiness (TCU, 2012). If some recipients perceive these feelings strongly, they are vulnerable to the sensation of a ‘disciplinary gaze’ from the government or relevant authorities, as Foucault (1977 [1975]) showed. In other words, the shame caused by the invasion of privacy to achieve or maintain entitlement to the Basic Old-Age Pension benefit can demolish one’s dignity (Honneth, 2007). Additionally,

the means-test system forces people to ask for a special benefit that makes them feel 'different' from others during the procedure. For instance, Hedges (2005) interviewed 41 people in three areas in Britain including Barnet, Sheffield, and Rugby and found that the means test made people feel humiliated as well as engendering a feeling of being treated as different from ordinary people.

Table 9.4 Association between the Basic Old-Age Pension and Happiness of Older People by Gender

Independent Variables		Socio-demographic Status			Socio-economic Status					Health Condition				Constant (SE)	R ² (ΔR ²)	F			
		Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having =1)	House (having =1)	Physical Health		Mental Health	Subjective Health						
M	B (SE) β									ADL (log)	IADL (log)	Depression (log)							
M 1	B (SE) β	-.186 (.095) -.063	3.790 (1.294) .094	2.128 (1.199) .052**										65.823 (7.406)	.021	8.00 ***			
M 2	B (SE) β	-.167 (.096) -.057	1.860 (1.279) .046	1.702 (1.158) .042**	3.846 (1.004) .112***	2.765 (1.744) .049	.974 (.591) .051	10.244 (4.590) .063	12.125 (1.444) .239***					52.546 (8.049)	.100 (.080) ***	15.85 ***			
M 3	B (SE) β	-.041 (.082) -.014	1.615 (1.044) .040	.255 (.948) .006*	.662 (.830) .019**	-.696 (1.432) -.012	-.700 (.485) -.037	8.296 (3.745) .051	7.593 (1.193) .150***	-.704 (.582) -.042*	-.198 (.297) -.025*	-3.756 (.784) -.126***	.456 (.024) .503***	36.852 (6.949)	.404 (.303) ***	63.89 ***			
M 4	B (SE) β	-.014 (.083) -.005	1.383 (1.050) .034	.380 (.940) .009*	.590 (.823) .017*	-.384 (1.485) -.007	-.361 (.491) -.019	7.182 (3.700) .044	6.318 (1.194) .124*	-.807 (.572) -.048*	-.334 (.293) -.042*	-3.385 (.774) -.114**	.440 (.024) .486*						
M 5	B (SE) β	.004 (.083) .001	1.089 (1.054) .027	.538 (.940) .013*	.428 (.824) .012*	-.163 (1.484) -.003	-.589 (.498) -.031	6.980 (3.692) .043	5.718 (1.216) .113*	-.833 (.571) -.050*	-.347 (.292) -.043*	-3.390 (.772) -.114**	.438 (.024) .484*						
Independent Variables		Structural Solidarity				Associational Solidarity					Functional Solidarity				Basic Old-Age Pension Benefit (received =1)				
		Number of Adult Children	Geographical Proximity (1 st Child)	Geographical Proximity (2 nd Child)	Geographical Proximity (3 rd Child)	Face-to-face Meeting (1 st Child)	Face-to-face Meeting (2 nd Child)	Face-to-face Meeting (3 rd Child)	Contacting via other communication channels (1 st Child, log)	Contacting via other communication channels (2 nd Child, log)	Contacting via other communication channels (3 rd Child, log)	Amount of Money Received from Adult Children (log)	Financial Support To Adult Children (provided =1)	Non-financial Support from Adult Children (received =1)				Non-financial Support To Adult Children (provided =1)	
M 4	B (SE) β	.975 (.302) .084**	.782 (.557) .044	.767 (.584) .043	.128 (.579) .007	-.092 (.367) -.009	-.256 (.378) -.025	-.688 (.384) -.063	-.539 (.330) -.054*	-.247 (.335) -.025	-.546 (.326) -.053	.788 (.436) .044*	4.049 (2.073) .044	-.981 (1.229) -.020	.880 (1.689) .013		32.815 (7.563)	.434 (.030) ***	32.96 ***
M 5	B (SE) β	.954 (.301) .082*	.724 (.556) .041	.788 (.583) .044	.104 (.578) .006	-.062 (.367) -.006	-.239 (.377) -.023	-.691 (.383) -.064	-.533 (.329) -.054*	-.237 (.335) -.024	-.505 (.325) -.049	.820 (.435) .046*	3.963 (2.068) .043	-1.011 (1.226) -.020	.849 (1.685) .012	-2.457 (.995) -.061**	33.595 (7.553)	.437 (.003) *	32.11 ***

Table 9.4 Association between the Basic Old-Age Pension and Happiness of Older People by Gender (continued)

Independent Variables		Socio-demographic Status			Socio-economic Status					Health Condition				Constant (SE)	R ² (ΔR ²)	F			
		Age	Marriage (married=1)	Religion (religious=1)	Education (log)	Employment (employed=1)	Income (log)	Vehicle (having =1)	House (having =1)	Physical Health		Mental Health	Subjective Health						
										ADL (log)	IADL (log)	Depression (log)							
M 1	B (SE) β	-.362 (.101) -.113	4.103 (1.985) .065	3.607 (1.222) .093**										79.902 (7.872)	.030	10.13 ***			
M 2	B (SE) β	-.004 (.105) -.001	2.302 (1.870) .037	2.993 (1.154) .077**	2.469 (.545) .141***	1.687 (1.405) .041	1.841 (.608) .106	6.547 (1.545) .135***	11.345 (1.570) .215***					34.146 (8.781)	.152 (.122) ***	22.16 ***			
M 3	B (SE) β	.221 (.089) .069	2.659 (1.562) .042	.826 (.964) .021*	1.099 (.467) .063**	-1.604 (1.179) -.039	1.069 (.508) .062	4.289 (1.289) .088**	8.038 (1.315) .152**	-744 (.608) -.051*	-716 (.341) -.090**	-2.315 (.915) -.071***	.386 (.026) .450***	11.390 (7.593)	.417 (.265) ***	58.74 ***			
M 4	B (SE) β	.203 (.097) .063	2.171 (1.569) .035	.398 (.958) .010*	.896 (.467) .051*	-1.646 (1.201) -.040	1.129 (.505) .065	4.393 (1.275) .090**	7.039 (1.343) .134*	-.884 (.602) -.060*	-.623 (.337) -.079*	-2.027 (.910) -.062*	.375 (.026) .436**						
M 5	B (SE) β	.223 (.097) .069	2.157 (1.565) .034	.487 (.956) .012*	.797 (.468) .046*	-1.563 (1.199) -.038	.853 (.517) .049	4.269 (1.272) .088**	6.333 (1.371) .120*	-.943 (.601) -.064*	-.608 (.336) -.077*	-1.995 (.907) -.062*	.373 (.026) .435**						
Independent Variables		Structural Solidarity				Associational Solidarity					Functional Solidarity				Basic Old-Age Pension Benefit (received =1)				
		Number of Adult Children	Geographical Proximity (1 st Child)	Geographical Proximity (2 nd Child)	Geographical Proximity (3 rd Child)	Face-to-face Meeting (1 st Child)	Face-to-face Meeting (2 nd Child)	Face-to-face Meeting (3 rd Child)	Contacting via other communication channels (1 st Child, log)	Contacting via other communication channels (2 nd Child, log)	Contacting via other communication channels (3 rd Child, log)	Amount of Money Received from Adult Children (log)	Financial Support to Adult Children (provided =1)	Non-financial Support from Adult Children (received =1)				Non-financial Support to Adult Children (provided =1)	
M 4	B (SE) β	.259 (.350) .021*	.153 (.572) .009	.302 (.620) .018	1.257 (.617) .074	-.679 (.360) -.071	.492 (.388) .053	-1.090 (.377) -.108	-.510 (.344) -.052*	-.548 (.358) -.057	.412 (.345) .041	1.129 (.448) .066*	1.937 (2.010) .023	.733 (1.151) .016	-1.396 (1.718) -.020		14.369 (8.15)	.443 (.026) ***	29.72 ***
M 5	B (SE) β	.286 (.349) .023*	.182 (.571) .011	.293 (.619) .018	1.201 (.616) .071	-.667 (.359) -.069	.507 (.387) .054	-1.067 (.377) -.106	-.517 (.343) -.052*	-.559 (.357) -.058	.447 (.345) .045	1.148 (.447) .067*	1.820 (2.006) .022	.819 (1.148) .018	-1.416 (1.714) -.021	-2.639 (1.091) -.064**	15.058 (8.135)	.447 (.004) *	28.97 ***

Note: M (Model), FOP (Female Older People), MOP (Male Older People), *P<.05, **P<.01, ***P<.001

Table 9.5 Feelings when Receiving the Basic Old-Age Pension Benefit

		Strongly Agree	Pretty Much Agree	Fairly Agree	Disagree	Absolutely Disagree	Total
“Now I become an older person”	Frequency	320	353	52	85	10	820
	Rate (%)	39	43	6.3	10.4	1.3	100
“People will think of me as poor”	Frequency	46	148	89	293	244	820
	Rate (%)	5.6	18	10.9	35.7	29.7	100

Source: MHWFA and KIHSA (2009: 214)

9.4. Conclusion

This chapter addressed the third research question, asking how public pension systems significantly associated with the degree of happiness of older people in contemporary South Korea. The question was addressed by two different pension programmes, namely the National Pension Scheme and the Basic Old-Age Pension, and their effect on the happiness of older people.

Regarding the effect of the National Pension Scheme on the happiness of older people, hypothesis 4-1, stating that there is a positive association between receiving the National Pension Scheme benefit and the happiness of older people, is rejected in older women. However, the hypothesis is supported in older men. This means that the National Pension Scheme benefit is not the critical determinant of the happiness of older women, and that older men who received the National Pension Scheme benefit are happier than those who did not receive it.

This gender difference in the positive effect of the National Pension Scheme benefit on the happiness of older people may be attributable to the patriarchal structure of the National Pension Scheme, which is based on the strong male bread-winner model of the South Korean welfare state. In other words, in South Korea, women are in reality excluded from the National Pension Scheme because the structure of the country’s labour

market is originally constituted for men rather than women.

When it comes to the effect of the Basic Old-Age Pension on the happiness of older people, hypothesis 4-2, i.e. a positive association between receiving the Basic Old-Age Pension benefit and the happiness of older people, is rejected in both older men and women. This means that the degree of happiness of both older men and women will not be increased when they receive the Basic Old-Age Pension benefit.

This surprising negative effect is probably induced because of the small amount paid by the benefit is not enough to mitigate the general negative effect of impoverishment. In other words, recipients who already experience economic impoverishment (i.e. only individuals below a certain income level can apply for the Basic Old-Age Pension benefit) are unlikely to experience any improvement in their happiness. Additionally, the negative effect is probably connected with the structural failure of the Basic Old-Age Pension. In other words, the means test possibly causes the negative effect on the happiness of both female and male respondents by its attendant social stigma, damaged dignity, and an unwelcome demand for personal information.

So far, we have analyzed the impact of the public pension systems, namely both of the National Pension Scheme and the Basic Old-Age Pension, on the happiness of older people by gender in contemporary South Korea. The empirical result generally shows that its public pension systems do not affect late-life happiness as expected, i.e. positively and equally in terms of gender, but rather that the effect is diverse according to the embedded context of older people in contemporary South Korea.

In the following concluding chapter, we will review our research questions and significant findings by summarizing and discussing them. Key policy implications will be suggested based on the findings, followed by comment on data limitations, and concluding remarks.

Chapter 10

Conclusion

10.1. Introduction

So far, we have analyzed the dynamics of the family support by focusing on the intergenerational solidarity and public pension systems, including both the National Pension Scheme and the Basic Old-Age Pension, and their impact on happiness in later life in contemporary South Korea. In conclusion, this chapter summarizes the key findings of the analyses and provides relevant discussions. It will identify profound policy implications based on the key findings in two ways, namely at the individual level and at governmental level, for supporting late-life happiness in contemporary South Korea. Finally, the chapter will account for several limitations of KLoSA followed by concluding remarks.

10.2. Thesis Summary and Discussion

The intellectual quest of the thesis originated from the logical linkage between demographic transformation, intergenerational solidarity, the government's social policy, and happiness in later life in contemporary South Korea. Specifically, the enormous demographic transitions changed intergenerational solidarity that changed the traditional family support system for older generations. Accordingly, the South Korean government extended the social security net provided by its public pension systems, namely the National Pension Scheme, a contributory system and the means-tested Basic Old-Age Pension, for supporting the older generations. Even though those changes significantly affect happiness in later life, there is no sophisticated study that has analyzed the dynamics among intergenerational solidarity, public pension systems, and happiness in later life in contemporary South Korea. This thesis therefore aims to analyze the

dynamics empirically by using KLoSA. To solve the research puzzle, the thesis was conducted according to three specific research questions.

The first research question, namely the characteristics of the intergenerational solidarity, public pension systems, and happiness in later life in contemporary South Korea, was addressed by descriptive statistics. Regarding structural solidarity, middle-aged and older people had on average two and three adult children, respectively. Structural solidarity in terms of the geographical proximity of middle-aged people was not strong whereas that of older people was very strong when taking into account the criterion of living within an hour's distance from their children. In associational solidarity, the key player of both middle-aged and older people was the contact via other communication channels rather than face-to-face meeting with adult children. Regarding financial functional solidarity, middle-aged people supplied more financial aid to adult children than they received from them, whereas older people received more financial support from adult children than they provided for them. The strength of financial functional solidarity in terms of the amount of money received from adult children increased as middle-aged parents grew old, but that received by older people decreased after the age of 75 years and over. In terms of non-financial functional solidarity, both middle-aged and older people actively exchanged food, household items, and health-care supplies. Both groups provided more food for their adult children but they received more other non-food items from their children.

Owing to the strong male bread-winner model of the labour market as well as more prevalent economic impoverishment among older women, there was a big gender difference in the public pension systems. In other words, almost three times more older men than older women received the National Pension Scheme benefit. By contrast, over 10 per cent of more older women received the Basic Old-Age Pension benefit than older

men. The level of happiness of both middle-aged and older people was high. However, the degree of happiness decreased in both groups as they aged.

It should be noted that they are interconnected. In other words, structural solidarity in terms of geographical proximity was related to associational solidarity, i.e. both middle-aged and older people who lived close to their adult children were more likely to meet with them but less likely to contact them in other ways. Structural solidarity in terms of the number of adult children connected with functional solidarity, namely both middle-aged and older people who had a greater number of adult children are more likely to receive non-financial support as well as a greater amount of money from them. Associational solidarity was related to happiness, namely both middle-aged and older people who met more often and had more contact with their adult children were more likely to report a higher level of happiness than those who met and contacted them less frequently. Structural solidarity was also related to happiness, i.e. both middle-aged and older people who have a greater number of adult children are more likely to be happier than those who have fewer adult children. Moreover, functional solidarity was related to happiness, namely both middle-aged and older people who received non-financial support from adult children were more likely to report a higher degree of happiness. The public pension systems were also related to happiness. For example, older people who received the Public Pension Scheme benefit were more likely to be happy than those who did not receive it. By comparison, older people who received the Basic Old-Age Pension benefit were less likely to be happy than those did not get this benefit.

The second research question, i.e. how does intergenerational solidarity significantly influence the degree of happiness in later life in contemporary South Korea, was addressed by the hierarchical multiple regression.

Regarding the impact of structural solidarity on happiness, hypothesis 1-1, i.e. that there is no significant relationship between the number of adult children and happiness in later life, is supported among middle-aged people but rejected among older people. Hypothesis 1-2, namely that there is a positive association between the geographical proximity of adult children and happiness in later life, is rejected in both middle-aged and older people.

The result means that structural solidarity in terms of the number of adult children is not an influential determinant of happiness for middle-aged people but only for older people – meaning that older people who have a greater number of adult children are happier than those who have fewer adult children. This is probably attributable to the fact that South Korean older people hold relatively Confucian views on fecundity as a source of great happiness of family than middle-aged people.

However, the result should be interpreted with a limitation. The analysis could not consider the quality of relationship between older parents and adult children, that is influential factor on the relationship between the number of adult children and the happiness of older people. Many previous studies such as Bradburn (1969), Rossi and Rossi (1990), Headey and Wearing (1992), Hogan and Eggebeen (1995), Pinquart and Sorensen (2000), Swartz (2009), and Vandeleur, Jeanpretre, and Perrez (2009) reported that more negative or limited the emotional closeness between parents and children, the more adult children can increase the negative effect of the happiness in later life due to the quality of relationship is the most common and basic type of connectedness between parents and children.

Furthermore, the insignificance of the other dimension of the structural solidarity, namely geographical proximity of adult children, on the happiness of both middle-aged and older people is partially attributable to the developed telecommunication technology

following the modernization of South Korea. In other words, technological development allows people to maintain real-time intimate relationships, i.e. by enjoying ‘freedom from spatial borderline’ or ‘immediate and decentralized connections’.

When it comes to the impact of the associational solidarity on happiness, the hypothesis 2-1, namely that there is a positive association between the frequency of face-to-face meeting and happiness in later life is rejected in both middle-aged and older people. Hypothesis 2-2, i.e. that there is a positive association between the frequency of contact via other communication channels and happiness in later life is rejected among middle-aged people whereas it is supported among older people.

This result means that associational solidarity in terms of the frequency of face-to-face meeting does not significantly determine the level of happiness of both middle-aged and older people, but that frequency of contact via other communication channels does significantly determine the degree of happiness of older people. In other words, associational solidarity is not a critical determinant of the happiness of middle-aged people whereas associational solidarity in terms of the frequency of contact with adult children via other communication channels is an influential element of the happiness of older people. This means that older people who have more contact with adult children via other communication channels are happier than those who have fewer contacts with adult children.

However, the result should be interpreted with a limitation. In other words, the analysis could not consider the quality of contact to be as important as the quantity of contact between older parents and adult children. Ward, Barnes, and Gahagan (2012) found that the quality of relationship among family members significantly affects happiness. Similarly, The Royal Society (2012), Swartz (2009), Fredrickson (2001), Victor and colleagues (2000), Ingersoll-Dayton, Morgan, and Antonucci (1997), Hogan

and Eggebeen (1995), and Rook and Pietromonaco (1987) reported that contact through indirect communication channels is negatively associated with people's happiness when the contact is exchanged among those who do not have a positive relationship, whereas contact is positively associated with peoples' happiness when actors have a positive relationship.

Another noticeable point of the result is that the greater impact of the frequency of contact via other communication channels with the first adult child than with any other adult children supports South Korean older people's conventional familial values. In other words, the result confirms the fact that the older generation places more emphasis on the first-born, rather than other adult children, based on the traditional Confucian familism.

This is probably the result of the relatively stronger individualism found among middle-aged people than among older people after industrialization in South Korea, as well as the role played by contact in ensuring happiness in later life by buffering the effects of negative incidents together with enhancing the 'social connectedness'. Furthermore, the result that neither middle-aged people nor older people are significantly affected by the frequency of face-to-face meeting is somewhat contradictory in South Korean family relations in that almost all South Korean parents place an emphasis on face-to-face meeting as a 'thick' association rather than contact through other communication channels as a 'thin' association. This may be attributable to the changed South Korean family culture after the collapse of the extended family structure as a result of industrialization, i.e. the modern relationship between adult children and their parents in South Korea has been restructured as more individualistic than previously.

Regarding the impact of functional solidarity, hypothesis 3-1, i.e. that there is a positive association between the amount of financial support received from adult children and the provision of financial aid to adult children and happiness in later life, is rejected

among middle-aged people whereas it is supported among older people. Furthermore, hypothesis 3-2, namely that there is a positive association between non-financial support received from adult children and providing it to adult children and happiness in later life, is rejected both middle-aged and older people.

This implies that financial functional solidarity does not significantly determine the level of happiness of middle-aged people but it does significantly determine the degree of happiness of older people. This means that older people who received more financial support from their adult children are happier than those who received less. The result also shows that non-financial functional solidarity does not significantly determine the level of happiness of both middle-aged and older people. This might be attributable to the fact that financial transfers can lessen the income risk of older people. The positive effect of receiving financial support from their adult children may be more significant for older people rather than middle-aged parents because the vast majority of older people are not employed so they do not earn a regular income. It is also possible that financial aid from their adult children satisfies the normative expectation of Confucianism for filial piety of older parents in South Korea.

The third research question, i.e. how do public pension systems significantly affect the degree of happiness in later life in contemporary South Korea, was also addressed by the hierarchical multiple regression.

Regarding the effect of the National Pension Scheme on the happiness of older people, hypothesis 4-1, namely that there is a positive association between receiving the National Pension Scheme benefit and the happiness of older people, is rejected in older women. However, the hypothesis is supported in older men. This generally means that the receipt of the National Pension Scheme benefit does not significantly affect the level of happiness of older women while it does significantly affect the degree of happiness of

older men. In other words, older men who received the National Pension Scheme benefit are happier than those who did not receive it. This gender difference in the positive effect of the National Pension Scheme benefit on the happiness of older people may be attributable to the patriarchal structure of the scheme, which is based on the strong male bread-winner model of the South Korean welfare state. In other words, in South Korea, women are in reality excluded from the National Pension Scheme since the structure of the country's labour market was originally constituted for men rather than women.

When it comes to the effect of the Basic Old-Age Pension on the happiness of older people, hypothesis 4-2, i.e. that there is a positive association between receiving the Basic Old-Age Pension benefit and the happiness of older people, is rejected in both older women and men. This generally means that both older women and men who receive the Basic Old-Age Pension benefit are not happier than those who do not receive the Basic Old-Age Pension benefit. This surprising negative effect is probably produced because of the small amount of the benefit, fixed at 5 per cent of the average monthly income during the immediate three years prior to an individual's start date for receiving benefits from the National Pension Scheme: the small amount of benefit is not enough to mitigate the general negative effect of impoverishment. In other words, recipients who already experience existing economic impoverishment (only individuals below a certain income level can apply for the Basic Old-Age Pension benefit) are unlikely to experience any improvement in their happiness. Additionally, the negative effect is probably connected with the structural failure of the Basic Old-Age Pension. In other words, the means test possibly provokes a negative effect on the happiness of both female and male respondents through social stigma, damaged dignity, and the unwelcome demand for providing personal information.

10.3. Policy Implications

The results presented above suggest some policy implications for happiness in later life in contemporary South Korea. They are by and large classified into two strands, namely implications for family support at the individual level and implications for public pension systems at governmental level.

Regarding family support, the key driver affecting the support system was the unprecedented demographic transition. Although demographic transformations eroded the traditional family structure and modern societies are more individualistic than before, people are still highly dependent on family support (Harper, 2007). It is not controversial that family support is very critical for late-life happiness (Bartley, 2012; Graham, 2011; Lee and colleagues, 2008). Particularly, according to Layard (2005), one of the most important happiness scholars, family support is the first important factor that determines the level of happiness in later life, before any other influential factors. The importance of family support for happiness in later life is particularly distinguished by its positive role. Heinemann (1985) and Timonen and Arber (2012) explained this by indicating the power of family support as representing a bank of aid as well as a passage for connecting with society:

“As an activated support system, the family’s major activities include social visitation, mutual aid, and complementing tasks of and linking family members with other social systems...The family, too, is the major source of help in times of difficulty and crisis...The elderly are not socially isolated from their families.” (Heinemann, 1985: 167-168)

“In many societies, family support acts as the key social protection mechanism that provides informal insurance for social risks such as inability to earn an income, for instance due to unemployment or old age.” (Timonen and Arber, 2012: 5)

In relation to the power of family support on late-life happiness, our analyses provide some policy suggestions to secure or increase late-life happiness at the individual level. In other words, the analysis suggests that children are to more frequently contact with their parents via other communication channels. It also suggests that the greater availability of children will increase late-life happiness. Furthermore, it suggests that children are expected to provide more financial support to their parents.

Meanwhile, the reasons why policy interventions by the government are needed are that state-level intervention shapes the structure of human life. Both Leeson (2012) and Mayer (1986) account for the importance of the structure as well as the significance of intervention by the welfare state on the structural influence to human being as follows:

“The problem is not the numbers of older people but the infrastructures in place.” (Leeson, 2012, JDC Interview)

“...the state legalizes, defines, and standardizes most parts of entry and exit...The state as a welfare state also provides structural continuity over the life course by preventing sudden and steep income losses, by redistributing income over the life span.” (Mayer, 1986: 167)

It is necessary to adopt a structural perspective when policy implications for late-life happiness through the effects of public pension systems are discussed at government level. This is primarily because the public pension systems are governed and managed by the government and because the effect of public pension systems is almost entirely dependent on their structure (Frericks and Maier, 2008; Hering, 2006; Evans and Falkingham, 1997). This means that a new structure of the public pension systems is needed in contemporary South Korea to reinstate the initial policy goals, namely securing happiness in later life.

More specifically, the gendered impact of the National Pension Scheme on the happiness of older people suggests that the scheme should be reformed towards achieving more gender equality. Considering not only the unfair division of unpaid house work between husbands and wives such the fact that a vast amount of unpaid house management and child rearing is carried out by wives but also just a few elite women can protect themselves from uncommodified work so that they may prepare their later lives (Ginn and Arber, 2000; Budlender, 2008; Peng, 2009), it is transparent that the gendered structure of the National Pension Scheme is structurally not fair. To overcome this, driving two wheels of policy responses simultaneously is necessary at governmental level.

One wheel is to promote female labour market participation at an early stage of life course to increase the possibility of participating in the National Pension Scheme as early as possible. However, the situation regarding female labour market participation in South Korea is still poor and has not developed. For example, rates of female labour market participation were 49.8 per cent in 2002, 50.2 per cent in 2007, and 49.7 per cent in 2011 (KNSO E-Index, 2012). The figures are much lower than the average rate (61.8 per cent in 2010) of OECD countries (OECD, 2011c). Additionally, the door for even higher-educated women to the labour market is narrower than that for men. At the same time, many more women are working in manual or low-skilled jobs than men, but many more men are working in professional jobs than women.

In contrast, promoting female labour market participation has already been identified as a policy goal by the European Union, such as in the Lisbon Agenda. However, the advanced European welfare states also have yet to achieve complete gender equality, despite existing governmental policies to increase female labour market participation (Ginn and MacIntyre, 2013). This unsatisfactory state of affairs is largely

attributable to gender roles and the power relationship between husbands and wives.

Arber and Ginn (1995) account for it as follows:

“The social norm of the male breadwinner with a wife engaged in homemaking is weaker now than earlier this century. Nevertheless...the situation where a man stays at home while his wife goes out to work is still regarded as strange and undesirable by many. Such a reversal of ‘traditional’ gender roles may be seen as challenging husbands’ economic dominance, a longstanding source of patriarchal power.”
(Arber and Ginn, 1995: 69)

This British situation is also applicable to the South Korean context, but its extent is relatively stronger in South Korea than in the United Kingdom. Promoting solely female labour market participation is not enough, because of the country’s relatively entrenched patriarchal values. Additionally, considering the fact that the un-paid work of women is directly connected with paid labour market participation (through difficulty in reconciling employment and care), more effective leave policies for both husbands and wives would be beneficial in the South Korean context.

The other wheel serves to change the gendered structure of the South Korean labour market, as simply increasing female labour market participation does not necessarily produce an increase in pension benefits (ILO, 2010; Kohli, 2008; Frericks and Maier, 2008). In other words, the fragmented employment conditions for female workers in the South Korean labour market such as more prevalent part-time and temporary positions as well as smaller salaries than male workers’ hinders women from receiving better benefits from the National Pension Scheme.

When it comes to policy implications in relation to the Basic Old-Age Pension, it should be noted that the negative effect of the Basic Old-Age Pension benefit on the happiness of older people is an exemplary case of the colonization of the life world by the

system as argued by Jurgen Habermas (1987 [1981]). In other words, the life world of older people, i.e. their happiness, has been negatively affected by the welfare system, i.e. the Basic Old-Age Pension. In this context, Richard Titmuss, founder of Social Policy at the London School of Economics and Political Science, criticized means-tested welfare programmes mainly because they contradicted the initial objectives of these programmes, which were intended to increase the happiness of recipients. Rather, he championed the universal principle of welfare policy as follows:

“One fundamental historical reason for the adoption of this principle was the aim of making services available and accessible to the whole population in such ways as would not involve uses in any humiliating loss of status, dignity or self-respect... If these services were not provided for everybody by everybody, they would either not be available at all or only for those who could afford them, and others on such terms as would involve the infliction of a sense of inferiority and stigma.”
(Titmuss, 2001: 117)

Moreover, in practice, means-tested welfare programmes usually discriminate against those who are in a very similar situation with those who passed the means test for receiving any welfare benefit. In other words, those who have just a little more financial resources such as a small amount of savings, assets, and private insurance, cannot pass the means test, and thereby fail to get the benefit even if they need to get help from the welfare programme (Hedges, 2005). By contrast, the happiness of the recipients of universal welfare provision is not negatively affected by the welfare programme, both because they do not have to experience the negative effect caused by the means test, and because they do not have to worry about losing their entitlement after every renewal examination for eligibility (Soss, 2000). This implies that the possibility of developing the happiness of the recipients of the Basic Old-Age Pension will increase when the programme is based on a universal system rather than a means-tested system.

10.4. Data Limitation

The KLoSA is the nationally representative data set that comprehensively surveyed the ageing issues in South Korea. Although its broad perspective allows us to analyze the complicated dynamics among intergenerational solidarity, public pension systems, and happiness in later life empirically, there are several limitations to the data set. First, we cannot compare the dynamics according to adult children's gender because of the quite large missing rates of the gender variable of adult children. Second, the variable on intergenerational co-residing is also not useful. Third, although we know whether older parents provided financial support for their adult children, the amount is largely missing. Finally, we know whether older people received both the National Pension Scheme benefit and Basic Old-Age Pension benefit, but the indicator for the relevant amount is largely missing. These limitations prompt us to conduct further analyses. These will be developed through a more elaborated nationally representative data set.

10.5. Concluding Remarks

This is the first academic research that has analyzed the dynamics between the intergenerational solidarity, public pension systems, and happiness in later life in contemporary South Korea by exploiting nationally representative empirical data after the tremendous demographic transitions in South Korea. Overall, this thesis shows that family support still plays a very important part in late-life happiness even if the role of the traditional family support system has diminished following the major demographic transitions that have taken place after industrialization. The analysis also shows that the public pension systems do not affect late-life happiness in the way that was expected, i.e.

positively as well as gender equally, but rather that the effect is diverse, according to the embedded context of older people in contemporary South Korea. The thesis suggests that a combined appropriate policy response, i.e. both on an individual and a governmental level, should be applied to support late-life happiness in contemporary South Korea.

However, it should be noted that our analyses refer to a certain point in time. In other words, they do not show how the picture will change as time passes. Moreover, the thesis cannot explain the specific mechanism of the dynamics. In other words, it cannot show how significant indicators determine late-life happiness. This is to be developed through further sophisticated researches.

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Appendices

Appendix 1. Summary of Questionnaires of the Second Wave of the Korean Longitudinal Study of Ageing

Variable	Question	Response Option	
Socio-Demographic Status	Age	In what year, month, and day were you born?	Open answer
	Gender	What is your gender?	1) Male 2) Female
	Marital Status	Are you currently married, living with a partner, separated, divorced, widowed, or have you never been married?	1) Currently married or living with a partner 2) Separated 3) Divorced 4) Widowed or missing (dispersed family) 5) Never married
	Religion	What is your religious preference? Is it Protestant, Catholic, Buddhism, Won Buddhism, some other religion or do you have no preference?	1) No preference 2) Protestant 3) Catholic 4) Buddhist 5) Won Buddhist 6) Other
Socio-Economic Status	Education	What is the highest level of school or college you completed?	1) No formal education (illiterate) 2) No formal education (capable of reading) 3) Elementary school 4) Middle school 5) High school 6) Two-year college 7) College graduation 8) Post college (Master) 9) Post college (PhD)
	Employment	Are you currently employed?	1) Yes 2) No
	Income	This variable was made by summing up the total amount of earned money and the total amount of assets, with side income from the assets (classified into five interval range).	
	Vehicle Ownership	Do you own any vehicles such as cars, trucks, a trailer, a boat, or any other means of transportation?	1) Yes 2) No
	House Ownership	Do you own your home, rent it, or what?	1) Own 2) Lease on a deposit basis without monthly rent 3) Monthly rent with a deposit 4) Monthly rent without a deposit 5) Other

Appendix 1. Summary of questionnaires of the second wave of Korean Longitudinal Study of Ageing (continued)

Variable		Question	Response Option
Health Condition	Physical Health	Activities of Daily Living (ADL)	1) No, I don't need any help. 2) Yes, I need help to some extent. 3) Yes, I need help in every respect.
		Do you have any difficulties with dressing? Dressing includes taking clothes out of a closet, putting them on, buttoning up, and fastening the belt.	
		Do you have any difficulties with washing your face and hair and brushing your teeth?	
		Do you have any difficulties with bathing or showering?	
		Do you have any difficulties with eating, such as cutting up your food? (Eating means eating food by oneself when it is ready.)	
		Do you have any difficulties with getting out of bed and walking across a room? You may use equipment or devices to get out of bed and walk across a room.	
		Do you have any difficulties with using the toilet, getting up and down?	
		Do you have any difficulties with controlling urination and defecation? You may use a catheter (conduit) or a pouch by yourself.	
		Instrumental Activities of Daily Living (IADL)	
		Do you have any difficulties with personal grooming? (Personal grooming means brushing hair, putting on make-up, shaving, and clipping nails and toenails.)	
		Do you have any difficulties with doing household chores? (Household chores mean house cleaning, doing dishes, making the bed, and arranging the house.)	
		Do you need any help with preparing hot meals? (Preparing hot meals means preparing ingredients, cooking, and serving food.)	
Do you have any difficulties with doing laundry? (Doing laundry means laundering either using machine or by hand and drying).			

		<p>Do you have any difficulties with taking a walk or going out in a short distance without using transportation (for example, going to a neighbourhood store on foot)?</p> <p>Do you have any difficulties with using transportation, such as a bus, subway, taxi, and car?</p> <p>Do you have any difficulties with shopping? (Shopping means deciding what to buy and paying for it).</p> <p>Do you have any difficulties with managing your money, such as paying your bills, keeping track of expenses, or managing assets?</p> <p>Do you have any difficulties with making phone calls?</p> <p>Do you have any difficulties with taking medication? (Taking medications means taking the right portion of medicine right on time.)</p>		
	Mental Health	Depression	<p>During the last week, how often did you lose interest in most things?</p> <p>During the last week, how often did you have trouble concentrating?</p> <p>During the last week, how often did you feel depressed?</p> <p>During the last week, how often did you feel tired out or low in energy?</p> <p>How was your last week? How often did you feel well?</p> <p>During the last week, how often were you afraid of something?</p> <p>During the last week, how often did you have trouble falling asleep?</p> <p>How often did you feel you were overall satisfied last week?</p> <p>How often did you feel alone last week?</p> <p>How often have you felt down on yourself, no good or worthless last week?</p>	<p>1) Very rarely (less than one day).</p> <p>2) Sometimes (1-2 days).</p> <p>3) Often (3-4 days).</p> <p>4) Almost always (5-7 days).</p>
	Subjective Health		Overall, how would you evaluate your health status?	0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100

Appendix 1. Summary of questionnaires of the second wave of Korean Longitudinal Study of Ageing (continued)

Variable		Question	Response Option
Intergenerational Solidarity	Structural Solidarity	Number of adult children	How many living children do you have? Open answer
		Geographical proximity to adult children	How close does your child live to you? 1) Within a 30-minute distance by public transportation. 2) Within a 1-hour distance by public transportation. 3) Within a 2-hour distance by public transportation. 4) More than a 2-hour distance by public transportation.
	Associational Solidarity	Frequency of face-to-face meeting with adult children	How often have you had contact with your child in person? 1) Almost every day (more than 4 times per week). 2) Once a week. 3) 2-3 times a week. 4) Once a month. 5) Twice a month (every two weeks). 6) Once or twice a year. 7) Three or four times a year (once every three or four months). 8) Five or six times a year (every two months). 9) Almost never a year. 10) Never.
		Frequency of contact with adult children via phone, mail, or email	How often have you had contact with your child by phone, mail, or e-mail?

	Functional Solidarity	Financial Functional Solidarity	Whether received financial support from adult children	During the last calendar year, did you receive any financial help from your children?	1) Yes, received regular monetary transfer. 2) Yes, received occasional monetary transfer. 3) Yes, non-monetary transfer. 4) No, I did not receive any financial help.
			Total amount of financial support received from adult children	During the last calendar year, what was the total amount of monetary transfers you received from your children? (Unit: 10,000 Korean won)	Open answer
			Whether provided financial support to adult children	During the last calendar year, did you give any financial help to your children?	1) Yes, made regular monetary transfer. 2) Yes, made occasional monetary transfer. 3) Yes, made non-monetary transfer. 4) No, I did not give any financial help.
		Non-Financial Functional Solidarity	Whether received travel provision, health-care supplies, household items, electrical goods, food from adult children	What was the type of non-monetary support? Please check all that apply	1) Leisure (eg. travel) 2) Health-related products 3) Household items 4) Electrical goods 5) Dining out and foods 6) Other
			Whether provided travel provision, health-care supplies, household items, electrical goods, food to adult children	What was the type of non-monetary transfer given? Please choose all that apply.	

			Whether provided care for grandchildren	During the past 12 months (not calendar year), did you take care of any of your grandchildren younger than 10 years old?	1) Yes, 2) No
Public Pension Systems	National Pension Scheme		Whether received National Pension Scheme benefit	Did you receive any benefits from the National Pension System in last calendar year?	1) Only received monthly income. 2) Only received lump-sum payment. 3) Received both. 4) No.
	Basic Old-Age Pension		Whether received Basic Old-Age Pension benefit	Did you receive Basic Old-Age Pension benefit?	1) Yes, I did. 2) No, I did not. 3) No, I am not eligible.
Happiness				Compared with your contemporaries, overall, how happy do you feel?	0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100

Appendix 2. Table of Korean Population and Housing Census in 2005

	Population (1,000)	Total			Urban Area			Rural Area		
		Total	A	CH	Subtotal	A	CH	Subtotal	A	CH
National	46,725	261,237	105,231	156,016	208,834	92,539	116,295	52,383	12,682	39,701
Seoul	9,796	54,542	19,017	35,525	54,542	19,017	35,525	0	0	0
Busan	3,519	20,042	8,119	11,923	19,598	7,959	11,639	444	160	284
Daegu	2,462	13,382	5,590	7,792	12,593	5,187	7,406	789	403	386
Incheon	2,526	14,049	6,224	7,825	13,739	6,194	7,545	310	30	280
Gwangju	1,417	7,509	4,218	3,291	7,509	4,218	3,291	0	0	0
Daejeon	1,442	8,017	3,823	4,194	8,017	3,823	4,194	0	0	0
Ulsan	1,047	5,560	2,597	2,963	4,667	2,167	2,500	893	430	463
Gyeonggi	10,419	54,958	25,928	29,030	44,951	22,381	22,570	10,007	3,547	6,460
Gangwon	1,461	8,874	3,345	5,529	5,297	2,642	2,655	3,577	703	2,874
Chungbuk	1,459	8,429	3,350	5,079	5,004	2,607	2,397	3,405	743	2,662
Chungnam	1,890	11,082	3,721	7,361	3,836	2,508	1,778	7,246	1,663	5,583
Jeonbuk	1,781	10,571	4,139	6,432	6,854	3,823	3,031	3,717	316	3,401
Jeonnam	1,819	10,561	3,254	7,307	4,432	2,420	2,012	6,129	834	5,295
Gyeongbuk	2,630	15,897	4,976	10,921	7,712	3,471	4,241	8,185	1,505	6,680
Gyeongnam	3,054	17,764	6,920	10,844	10,083	4,572	5,511	7,681	2,348	5,333

Note: A (Apartment), CH (Common Housing).

Source: KNSO (2005)

Appendix 3. ADL and IADL in Later Life by Gender (those who responded ‘Need no help’)

		Aged 45-64				Aged 65+			
		FMAP		MMAP		FOP		MOP	
		F	%	F	%	F	%	F	%
A D L	Dressing and undressing	2,551	99.5	2,055	98.7	2,261	96	1,607	95.4
	Washing face and hair, and brushing teeth	2,555	99.6	2,058	98.8	2,261	96	1,608	95.5
	Bathing or showering	2,544	99.2	2,051	98.5	2,185	92.7	1,566	93
	Self-feeding	2,557	99.7	2,061	98.9	2,277	96.6	1,624	96.4
	Getting out of bed	2,552	99.5	2,063	99	2,242	95.2	1,601	95.1
	Using the toilet	2,555	99.6	2,063	99	2,283	96.9	1,619	96.1
	Managing bowel and bladder	2,557	99.7	2,065	99.1	2,291	97.2	1,620	96.2
I A D L	Grooming	2,549	99.4	2,049	98.4	2,234	94.8	1,596	94.8
	Housework	2,535	98.8	1,969	94.5	2,109	89.5	1,500	89.1
	Preparing meal	2,538	98.9	1,866	89.6	2,096	89	1,379	81.9
	Laundry	2,533	98.8	1,887	90.6	2,054	87.2	1,379	81.9
	Community mobility without transportation	2,539	99	2,031	97.5	2,095	88.9	1,525	90.6
	Going out by transportation	2,533	98.8	2,033	97.6	2,018	85.7	1,504	89.3
	Shopping	2,545	99.2	2,047	98.3	2,110	89.6	1,555	92.3
	Financial management	2,540	99	2,041	98	2,064	87.6	1,548	91.9
	Using telephone	2,546	99.3	2,059	98.8	2,165	91.9	1,582	93.9
Taking medication as prescribed	2,554	99.6	2,061	98.9	2,238	95	1,592	94.5	

Note: F (Frequency), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

Appendix 4. Depression in Later Life by Gender

			Losing interest in doing something		Having difficulty in concentrating		Generally feeling depressed		Losing energy and feeling tired		Feeling well		Feeling afraid		Having difficulty in sleeping		Feeling non-grievance		Feeling lonely		Feeling worthless	
			F	%	F	%	F	%	F	%	F	%	F	%	F	%	F	%	F	%	F	%
Aged 45 - 64	FMAP	Almost Never	1,543	60.2	1,722	67.1	1,708	66.6	1,467	57.2	733	28.6	1,775	69.2	1,675	65.3	657	25.6	1,701	66.3	1,798	70.1
		Sometimes	819	31.9	674	26.3	656	25.6	780	30.4	651	25.4	624	24.3	606	23.6	576	22.5	675	26.3	600	23.4
		Often	178	6.9	146	5.7	164	6.4	248	9.7	527	20.5	138	5.4	199	7.8	528	20.6	144	5.6	133	5.2
		Always	25	1	23	0.9	37	1.4	70	2.7	654	25.5	28	1.1	85	3.3	804	31.3	45	1.8	34	1.3
		Total	2,565	100	2,565	100	2,565	100	2,565	100	2,565	100	2,565	100	2,565	100	2,565	100	2,565	100	2,565	100
	MMAP	Almost Never	1,438	69	1,553	74.6	1,538	73.8	1,374	66	670	32.2	1,533	73.6	1,565	75.1	599	28.8	1,554	74.6	1,583	76
		Sometimes	532	25.5	436	20.9	440	21.1	533	25.6	514	24.7	449	21.6	374	18	430	20.6	414	19.9	409	19.6
		Often	100	4.8	81	3.9	89	4.3	127	6.1	359	17.2	82	3.9	104	5	366	17.6	90	4.3	65	3.1
		Always	13	0.6	13	0.6	16	0.8	49	2.4	540	25.9	19	0.9	40	1.9	688	33	25	1.2	26	1.2
		Total	2,083	100	2,083	100	2,083	100	2,083	100	2,083	100	2,083	100	2,083	100	2,083	100	2,083	100	2,083	100
Aged 65+	FOP	Almost Never	973	41.3	989	42	1,022	43.4	832	35.3	415	17.6	1,175	49.9	1,004	42.6	409	17.4	1,058	44.9	1,036	44
		Sometimes	847	36	826	35.1	864	36.7	844	35.8	646	27.4	798	33.9	804	34.1	530	22.5	833	35.4	794	33.7
		Often	429	18.2	421	17.9	358	15.2	475	20.2	716	30.4	275	11.7	382	16.2	789	33.5	325	13.8	351	14.9
		Always	107	4.5	120	5.1	112	4.8	205	8.7	579	24.6	108	4.6	166	7	628	26.7	140	5.9	175	7.4
		Total	2,356	100	2,356	100	2,356	100	2,356	100	2,356	100	2,356	100	2,356	100	2,356	100	2,356	100	2,356	100
	MOP	Almost Never	895	53.1	942	55.9	975	57.9	842	50	413	24.5	1,053	62.5	963	57.2	371	22	1,021	60.6	992	58.9
		Sometimes	575	34.1	509	30.2	505	30	562	33.4	429	25.5	459	27.3	474	28.1	405	24	470	27.9	473	28.1
		Often	176	10.5	178	10.6	162	9.6	213	12.6	420	24.9	133	7.9	178	10.6	408	24.2	144	8.6	158	9.4
		Always	38	2.3	55	3.3	42	2.5	67	4	422	25.1	39	2.3	69	4.1	500	29.7	49	2.9	61	3.6
		Total	1,684	100	1,684	100	1,684	100	1,684	100	1,684	100	1,684	100	1,684	100	1,684	100	1,684	100	1,684	100

Note: F (Frequency), FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

Appendix 5. Relationship between the Health Condition and Intergenerational Solidarity in Later Life by Gender

				Physical Health						Mental Health				
				ADL			IADL			Depression				
				1	2	3	1	2	3	1	2	3	4	
Associational Solidarity	Meeting (at least once a month)	Aged 45 - 64	FMAP	1 st Child	44	35.1	20.9	50.1	30.5	19.4	12.1	23.1	31.5	33.3
				2 nd Child	43.4	34.2	22.4	42.1	31.5	26.4	11.7	22.2	29.9	36.2
				3 rd Child	45.2	33	21.8	44	31.8	24.2	13.2	21.1	31.5	34.2
			MMAP	1 st Child	42.1	38.5	19.4	45.2	38.6	16.2	11.9	22.9	30	35.2
				2 nd Child	49.4	39.6	11	40.9	35.7	23.4	12.1	22.3	26.4	39.2
				3 rd Child	48.1	31.1	20.8	41.2	34.2	24.6	10.9	22.2	31.2	35.7
		Aged 65+	FOP	1 st Child	50	33.1	11.9	45.7	37.2	17.1	11.1	27.8	24.6	39.5
				2 nd Child	43.2	36.2	20.6	39.7	35.7	24.6	14.1	21.2	28.8	35.9
				3 rd Child	44.2	34.3	21.5	41.7	37.1	21.2	13.7	24.5	25.5	36.3
			MOP	1 st Child	40.1	37.9	22	41.2	36.1	22.7	16.5	22.4	23.9	37.2
				2 nd Child	49.1	34.1	16.8	43.5	38.2	18.3	12.2	22.5	31.8	33.5
				3 rd Child	39.7	33.7	26.6	44.9	37.3	17.8	10.2	24.1	26.8	38.9
	Contacting (at least once a month)	Aged 45 - 64	FMAP	1 st Child	14.4	35.3	50.4	12.8	32.1	55.1	6.1	19.3	31.3	43.3
				2 nd Child	15.2	32.1	52.7	6.9	35.2	57.9	3.4	20.1	30.3	46.2
				3 rd Child	16.1	29.9	54	9.9	32.1	58	5.4	23.3	29.1	42.2
			MMAP	1 st Child	13.2	31.7	55.1	10	35.1	54.9	4.3	20.6	29.9	45.2
				2 nd Child	19.4	30.1	50.5	7.5	35.8	56.7	11.6	21.2	30.1	37.1
				3 rd Child	19.6	31.3	49.1	7.3	33.5	59.2	5	19.1	30.2	45.7
		Aged 65+	FOP	1 st Child	18.2	31.1	50.7	15.8	32	52.2	4.1	23.8	29.6	42.5
				2 nd Child	16.3	33.9	49.8	12.4	29.9	57.7	11.1	18.2	30.8	39.9
				3 rd Child	12	36.2	51.8	9.9	31.9	58.2	9.7	17.5	31.5	41.3
			MOP	1 st Child	10.5	37.3	52.2	12.2	31.7	56.1	7.5	20.4	31.9	40.2
				2 nd Child	15.4	35.1	49.5	8.4	32.5	59.1	6.2	21.5	29.8	42.5
				3 rd Child	9.2	39.6	51.2	5	36.1	58.9	8.2	20.1	30.8	40.9

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

Appendix 6. Relationship between Intergenerational Solidarities in Later Life by Gender

Associational Solidarity				Meeting (at least once a month)			Contacting (at least once a month)			
				1 st Child	2 nd Child	3 rd Child	1 st Child	2 nd Child	3 rd Child	
Structural Solidarity	Geographical Proximity (by public transportation)	Aged 45 - 64	FMAP	Within 30 minutes	93.2	63.1	57.7	73.1	64.3	61.2
				Within 1 hour	67.8	55.5	47.2	81.2	73.4	66.3
				Within 2 hours	42.2	42.3	35.2	84.3	78.3	70.1
				Over 2 hours	21.1	32.5	32.9	89.3	82.3	77.2
			MOP	Within 30 minutes	90.1	67.3	51.3	75.3	67.4	56.4
				Within 1 hour	79.8	59.3	43.2	78.3	73.1	55.3
				Within 2 hours	48.2	38.2	28.3	80.6	77.8	59.2
				Over 2 hours	19.7	24.1	17.2	84.3	78.3	64.3
		Aged 65+	FOP	Within 30 minutes	79.5	49	45.2	76	63	54
				Within 1 hour	47.6	39.5	38.3	88.5	72.4	64.3
				Within 2 hours	23	24.8	23.7	91.1	88.5	77.8
				Over 2 hours	7.3	22.4	24.9	92.9	90.2	78.1
			MOP	Within 30 minutes	82.1	65.3	59.2	80.3	74.6	66.5
				Within 1 hour	54.3	49.7	47.1	83.4	79.4	72.1
				Within 2 hours	28.3	29.3	30.2	88.9	80.8	78.2
				Over 2 hours	12.2	21.2	13.4	92.4	76.3	77.4
Functional Solidarity				Amount of Money (Received in won)			Non-financial Support (Received)			
				0-1,000,000		Over 4,000,000	Yes			
Structural Solidarity	Number of Adult Children	Aged 45 - 64	FMAP	1	45.3	8.2	51.5			
				2	55.2	10.1	60.5			
				3+	55.4	15.4	66.1			
		MMAP	1	49.1	7.8	48.3				
			2	52.1	9.7	54.5				
			3+	53.2	12.4	61.2				

		Aged 65+	FOP	1	58.7	7.9	72.1
				2	64.2	12.7	75.5
				3+	73.7	14.4	83.2
			MOP	1	60.3	7.7	77.3
				2	70.1	11.3	84.3
				3+	74.7	12.3	88.2

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People).

Appendix 7. Correlation among Socio-Demographic and Economic Status, Health Condition, and Happiness in Later Life by Gender

		Variables	1	2	3	4	5	6	7	8	9	10	11	12	13		
Aged 45 - 64	F M A P	1	Age	1													
		2	Marriage	-.135**	1												
		3	Religion	.092**	-.004	1											
		4	Education	-.409**	.137**	.035	1										
		5	Employment	-.224**	-.017	-.045*	.011	1									
		6	Income	-.211**	-.012	-.081**	.211**	.358**	1								
		7	Vehicle	-.117**	.007	.037	.195**	.060**	.167**	1							
		8	House	.095**	.156**	.003	-.036	-.048*	.044	.065**	1						
		9	ADL	.051**	-.036	.016	-.024	-.070**	.001	-.002	.009	1					
		10	IADL	.070**	-.046*	-.014	-.046*	-.088**	-.021	-.006	-.019	.418**	1				
		11	Depression	.148**	-.125**	-.059**	-.186**	-.126**	-.103**	-.047*	-.074**	.210**	.232**	1			
		12	Subjective Health	.295**	-.086**	.051**	-.302**	-.163**	-.191**	-.078**	-.044*	.127**	.177**	.315**	1		
		13	Happiness	-.080**	.793**	.093**	.701**	.006*	.112**	.102**	.231**	-.121**	-.131**	-.509**	.457**	1	
		M M A P	1	Age	1												
			2	Marriage	.063**	1											
			3	Religion	.078**	.087**	1										
			4	Education	-.296**	.097**	.071**	1									
			5	Employment	-.281**	.167**	-.021	.128**	1								
			6	Income	-.291**	.217**	.016	.389**	.343**	1							
			7	Vehicle	-.157**	.212**	-.016	.232**	.238**	.352**	1						
			8	House	.092**	.197**	-.021	-.013	.035	.155**	.217**	1					
			9	ADL	.031	-.083**	-.014	-.057**	-.223**	-.136**	-.113**	-.059**	1				
			10	IADL	.059**	-.068**	.025	-.075**	-.289**	-.163**	-.157**	-.064**	.414**	1			
			11	Depression	.070**	-.179**	-.045*	-.143**	-.242**	-.187**	-.177**	-.071**	.211**	.282**	1		
			12	Subjective Health	.186**	-.133**	.035	-.222**	-.303**	-.283**	-.248**	-.083**	.215**	.279**	.309**	1	
			13	Happiness	.008*	.744**	.138**	.803**	.733**	.298**	.296**	.224**	-.196**	-.262**	-.505**	.447**	1
Aged 65+	F	1	Age	1													
	O	2	Marriage	-.407**	1												

P	3	Religion	-.075**	-.034	1										
	4	Education	-.172**	.145**	.007	1									
	5	Employment	-.236**	.145**	-.002	-.072**	1								
	6	Income	-.207**	-.061*	-.027	.096**	.318**	1							
	7	Vehicle	-.064**	.033	.004	.117**	.015	.072**	1						
	8	House	-.010	.091**	.054**	.029	.062**	-.067**	.045*	1					
	9	ADL	.253**	-.102**	-.065**	-.058**	-.095**	-.074**	-.011	-.036	1				
	10	IADL	.384**	-.164**	-.086**	-.102**	-.158**	-.153**	-.028	-.047*	.449**	1			
	11	Depression	.127**	-.091**	-.067**	-.099**	-.103**	.002	-.025	-.126**	.216**	.270**	1		
	12	Subjective Health	.159**	-.056**	.001	-.173**	-.064**	-.178**	-.107**	-.115**	.196**	.263**	.389**	1	
	13	Happiness	-.095**	.119**	.765**	.733	.057**	.033*	.087**	.245**	-.456**	-.468**	-.671**	.493**	1
	M O P	1	Age	1											
		2	Marriage	-.136**	1										
3		Religion	-.068**	.087**	1										
4		Education	-.185**	.028	.066**	1									
5		Employment	-.278**	.078**	.010	-.082**	1								
6		Income	-.343**	.093**	.012	.136**	.475**	1							
7		Vehicle	-.288**	.067**	.077**	.233	.146**	.238**	1						
8		House	-.016	.089**	.051*	.032	.096**	.088**	.130**	1					
9		ADL	.144**	.008	-.028	-.029	-.162**	-.121**	-.090**	-.077**	1				
10		IADL	.267**	-.025	-.028	-.065**	-.219**	-.210**	-.140**	-.065**	.500**	1			
11		Depression	.178**	-.112**	-.096**	-.141**	-.143**	-.119**	-.112**	-.108**	.338**	.352**	1		
12		Subjective Health	.189**	-.043	-.019	-.176**	-.167**	-.260**	-.145**	-.138**	.275**	.348**	.353**	1	
13		Happiness	-.117**	.088**	.783**	.887**	.117**	.191**	.213**	.245**	-.412**	-.452**	-.445**	.531**	1

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), **p<.01; *p<.05; 2-tailed.

Appendix 8. Correlation between Structural Solidarity and Happiness in Later Life by Gender

			Variables	1	2	3	4	5	
Aged 45 - 64	F M A P	1	Number of Adult Children	1					
		2	Proximity (1 st)	-.064*	1				
		3	Proximity (2 nd)	-.100**	.395**	1			
		4	Proximity (3 rd)	-.063*	.362**	.441**	1		
		5	Happiness	.106*	.112*	.108*	.116*	1	
	M M A P	1	Number of Adult Children	1					
		2	Proximity (1 st)	-.154**	1				
		3	Proximity (2 nd)	-.131**	.426**	1			
		4	Proximity (3 rd)	-.026**	.305**	.372**	1		
		5	Happiness	.108*	.131*	.139*	.113*	1	
Aged 65+	F O P	1	Number of Adult Children	1					
		2	Proximity (1 st)	.038	1				
		3	Proximity (2 nd)	.081**	.367**	1			
		4	Proximity (3 rd)	.051*	.322**	.382**	1		
		5	Happiness	.351**	.116*	.121*	.109*	1	
	M O P	1	Number of Adult Children	1					
		2	Proximity (1 st)	.050	1				
		3	Proximity (2 nd)	.086**	.394**	1			
		4	Proximity (3 rd)	.075**	.357**	.407**	1		
		5	Happiness	.413**	.124*	.103*	.110*	1	

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), **p<.01; *p<.05; 2-tailed.

Appendix 9. Correlation between Associational Solidarity and Happiness in Later Life by Gender

		Variables	1	2	3	4	5	6	7
Aged 45 - 64	F M A P	1 Meeting (1 st)	1						
		2 Meeting (2 nd)	.406**	1					
		3 Meeting (3 rd)	.321**	.336**	1				
		4 Contact (1 st)	.419**	.234**	.211**	1			
		5 Contact (2 nd)	.296**	.379**	.291**	.419**	1		
		6 Contact (3 rd)	.230**	.258**	.344**	.420**	.331**	1	
		7 Happiness	-.139*	-.113*	-.129*	-.139*	-.124*	-.147*	1
	M M A P	1 Meeting (1 st)	1						
		2 Meeting (2 nd)	.373**	1					
		3 Meeting (3 rd)	.281**	.391**	1				
		4 Contact (1 st)	.353**	.222**	.174**	1			
		5 Contact (2 nd)	.238**	.362**	.235**	.426**	1		
		6 Contact (3 rd)	.223**	.317**	.406**	.443**	.356**	1	
		7 Happiness	-.149*	-.109*	-.100*	-.115*	-.132*	-.152*	1
Aged 65+	F O P	1 Meeting (1 st)	1						
		2 Meeting (2 nd)	.409**	1					
		3 Meeting (3 rd)	.335**	.386**	1				
		4 Contact (1 st)	.443**	.253**	.192**	1			
		5 Contact (2 nd)	.273**	.429**	.236**	.323**	1		
		6 Contact (3 rd)	.244**	.279**	.408**	.442**	.330**	1	
		7 Happiness	-.116*	-.132*	-.167*	-.385**	-.134*	-.145*	1
	M O P	1 Meeting (1 st)	1						
		2 Meeting (2 nd)	.408**	1					
		3 Meeting (3 rd)	.303**	.425**	1				
		4 Contact (1 st)	.417**	.273**	.168**	1			
		5 Contact (2 nd)	.263**	.448**	.273**	.409**	1		
		6 Contact (3 rd)	.227**	.338**	.392**	.452**	.374**	1	
		7 Happiness	-.178*	-.102*	-.152*	-.407**	-.156*	-.153*	1

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), **p<.01; *p<.05; 2-tailed.

Appendix 10. Correlation between Functional Solidarity and Happiness in Later Life by Gender

		Variables	1	2	3	4	5
Aged 45 - 64	F M A P	1	Amount of Financial Support Received from Adult Children	1			
		2	Non-financial Support Received from Adult Children	.039	1		
		3	Financial Support Given to Adult Children	-.046	.116**	1	
		4	Non-financial Support Given to Adult Children	.035	.039*	.363**	1
		5	Happiness	-.101*	-.112*	.146*	.127*
	M M A P	1	Amount of Financial Support Received from Adult Children	1			
		2	Non-financial Support Received from Adult Children	.046	1		
		3	Financial Support Given to Adult Children	-.029	.161**	1	
		4	Non-financial Support Given to Adult Children	.010	.042	.379**	1
		5	Happiness	-.104*	-.112*	.102*	.111*
Aged 65+	F O P	1	Amount of Financial Support Received from Adult Children	1			
		2	Non-financial Support Received from Adult Children	.009	1		
		3	Financial Support Given to Adult Children	-.036	.009	1	
		4	Non-financial Support Given to Adult Children	-.055*	-.019	.197**	1
		5	Happiness	.413**	.144*	.117*	.105*
	M O P	1	Amount of Financial Support Received from Adult Children	1			
		2	Non-financial Support Received from Adult Children	-.020	1		
		3	Financial Support Given to Adult Children	-.038	.010	1	
		4	Non-financial Support Given to Adult Children	-.088**	-.003	.192**	1
		5	Happiness	.372**	.116*	.106*	.108*

Note: FMAP (Female Middle-aged People), MMAP (Male Middle-aged People), FOP (Female Older People), MOP (Male Older People), **p<.01; *p<.05; 2-tailed.