

# ASSESSING EFFECTIVENESS AND EQUITY IN SOCIAL WELFARE SYSTEMS: A MONGOLIA–SOUTH KOREA COMPARISON

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**Abstract:** *This study explores how social welfare systems in Mongolia and South Korea perform in terms of reducing poverty and promoting equity. Using a mixed-methods approach, it combines statistical analysis with insights from policy documents and existing research. The findings show that South Korea maintains lower and more stable poverty rates, supported by stronger institutions and a more diversified economy. In contrast, Mongolia experiences higher and more fluctuating poverty levels, largely due to its reliance on commodity-driven growth. The results also show that while poverty in Mongolia decreases during periods of economic expansion, these improvements are not sustained during downturns. In addition, analysis of income inequality reveals that both countries continue to face persistent disparities. Overall, the study highlights the importance of economic stability and institutional strength in achieving welfare systems that are both effective and equitable.*

**Keywords:** *Social welfare systems; Poverty reduction; Income inequality; Comparative analysis; Mongolia; South Korea*

## INTRODUCTION

As nations all across the world have turned their attention more towards reducing inequality and poverty to meet their Sustainable Development Goals (SDGs), evaluating and analyzing the effectiveness of different social welfare systems has become a major research topic among scholars. In particular, they analyze how well governments design their welfare systems to effectively promote a much fairer and more equitable distribution of resources and opportunities while fostering economic stability.

In this regard, Mongolia and the Republic of Korea practically offer an interesting comparative case. Despite both sharing major policy changes for SDGs in recent decades, historically, their social welfare systems have taken different routes. Combining social insurance, social assistance, and universal benefits like child support, Mongolia's welfare system can be called mixed and transitional. This shows how it has been dramatically evolving from being an ideology-based socialist country to a market-based democratic country.

South Korea, on the other hand, has developed a largely corporatist welfare model with liberal components. Although social insurance is the main factor, family-based support and personal spending still play a significant role in the framework. Historically, both Korea's rapid economic growth and low welfare supply have led to this hybrid design.

These contrasting development pathways offer a great basis for investigating how various welfare systems address problems of policy effectiveness and equality issues. Comparing South Korea with Mongolia, this research aims to explore key similarities and differences in their social welfare systems and evaluate their impacts on social outcomes.

While Mongolia and South Korea have developed distinct social welfare systems, both countries still face ongoing challenges in reaching effectiveness, fairness, and equity. Therefore, it is crucial to conduct a deeper analysis of how their social welfare models impact policy outcomes related to effectiveness and equity. This gap limits our understanding of which model works best and underlines the need for a comparative study. Thus, we conducted this study to answer the following question: Which model is most effective at generating fair, consistent inequality trends and high-quality services?

This paper starts with a review of existing literature on social welfare systems and theoretical frameworks of effectiveness and equity. Then, it presents the comparative methodology used in this study. The following section analyzes and concisely outlines an overview of the social welfare systems of Mongolia and Korea, focusing on structure, development, and key policy differences. Following this, the statistical comparative analysis seeks to explore how a difference in the welfare model influences the effectiveness and equity. Finally, this study concludes with key findings and discusses their implication for social welfare policy.

#### PREVIOUS STUDIES ON WELFARE TYPOLOGY, EFFECTIVENESS, AND EQUITY

This section focuses on identifying and reviewing the existing theories and prior knowledge on welfare typology, effectiveness, and equity to develop the theoretical framework of the current study and explore unanswered questions in the existing literature. Therefore, we first reviewed how previous studies defined

concepts of welfare typology, effectiveness, and equity to adapt these concepts so that they fit the empirical purpose of this study. Then, we paid much attention to revealing what is currently known and what is still unknown in the existing literature to find a valuable unexplored area for the current study.

Our literature review began with the theoretical framework of welfare regime typology. Danish sociologist Gøsta Esping-Andersen is one of the key scholars who developed theories on welfare regime typology (Esping-Andersen, 1990). His theory classifies welfare states into “liberal”, “corporatist-statist”, and “social-democratic welfare regimes” based on their characteristics. He also created a concept, “decommodification,” to measure how much social policies reduce individuals’ dependency on the market. However, his framework has been critiqued in association with its limited applicability in examining East Asian welfare states. To fill this gap, British political scientist Ian Holliday proposed the concept of “productivist welfare capitalism” (Holliday, I, 2002). According to his theory, productivist welfare capitalism (PWC) is a social policy model that depends entirely on the goals of economic growth and industrial development. The following studies that rely on the concept of PWC have consistently explored that productivist welfare states in East Asia treat social policy as a tool for advancing the economy, while Western welfare states put most of their efforts on social rights and equality (Yang, N., & Kühner, S, 2020). Additionally, recent studies show that the productivist welfare regime is greatly weakening in East Asia, and they are lessening their “pure” productivist principle that prioritizes economic growth in association with global economic changes, their aging population, and democratic political pressures (Choi, 2012; Yang & Kühner, 2025). This weakening shift in the “pure” productivist welfare policy raises an important question: What concepts are most appropriate to comparatively examine the welfare regime types of Mongolia and Korea?

The research works on social protection concepts, and metrics are another important literature that measures, compares, and explains different achievements of effectiveness and equity in various distinct individual welfare regimes. They conceptualize the effectiveness generally as an outcome indicator measuring how much a social policy or program that is designed to reduce poverty and inequity, improve resilience to economic shocks, and increase human capital and productivity achieves its intended goals (Brooks Evans et al, 2018). Most of them highlight the role of social protection in reducing poverty and improving inclusivity, sustainability, and productivity to define the concept of effectiveness. Their findings suggest that an effective welfare regime significantly enhances the impact of social protection and promotes fair distribution of resources in a country (Heintz & Lund, 2012). Generally, there have been many research works on the relationship between the effectiveness of the welfare regime and the level of equity, but future studies

need to investigate how a country-specific context, such as economic stability and political situation, influences the strength of this relationship.

The literature that has studied Mongolia's and Korea's welfare regimes is the third valuable scholarly source for our study, which aims to systematically analyze the similarities and differences of the welfare regimes and the effectiveness of the two countries. Research on South Korea's welfare model shows that its productivist welfare has been markedly shifting from social protection for productive members of society towards social protection for the general population. Its welfare system has significantly expanded due to its democratic political pressures, global economic shocks, and aging population (Choi, 2012; Kwon and Kim, 2026). In contrast, Mongolia's welfare system has still been in a transitional stage, characterized by the combination of social insurance and assistance programs. It still experiences challenges in promoting equity and sustainability (Dorjdagva et al., 2021).

Despite extensive research examining the welfare systems of these countries independently, more comparative studies are needed to better understand both effectiveness and equity across cases. This gap shows that there is a need for the comparative analysis of Mongolia and Korea.

Overall, the theories in the existing literature provide valuable knowledge on welfare systems and their impacts, but every new comparative research needs to define its theoretical framework in accordance with its purpose to compare effectiveness and equity across different national contexts. Therefore, this study constructs its theoretical framework based on welfare regime theory and key concepts of social policy to guide the analysis.

## **THEORETICAL FRAMEWORK**

Based on the information from the literature review, this study developed a theoretical framework that relies on welfare state theory and key concepts of social policy. Our theoretical framework assumes that the country-specific political and economic context plays a crucial role in shaping the key characteristics of the welfare model of the given country, and these characteristics serve as a key factor influencing social policy effectiveness. However, this cause-and-effect mechanism remains poorly studied for the contexts and welfare models in Mongolia and Korea through a comparative analysis. It is impossible to explain the Mongolian and Korean welfare models and their social policy effectiveness based on a single conventional wisdom, because of their unique historical development pathway. Therefore, in this study, we mix the Western classification of welfare state developed by Gøsta Esping-Andersen (1990) with the concept of productivist clientelism popularized by Ian Holliday (2000) to compare the welfare models of Mongolia and Korea.

Additionally, this study applies the concepts of effectiveness and equity as key analytical dimensions to compare social policy impacts of Mongolian and Korean welfare models. Based on our literature review, in this study, the concept of effectiveness is defined as the overall ability of the welfare model to significantly enhance social policy outcomes, such as poverty and inequality reduction. Equity is defined as a fairer and more just distribution of benefits and horizontal equity.

By applying these theoretical frameworks and concepts outlined above, we propose the following research question in this study: How does a country-specific welfare model, shaped by political and economic context, influence social policy effectiveness in promoting equity? To find a possible answer to this research question, this study employs a comparative approach to analyze the social welfare systems of Mongolia and South Korea.

## **METHODOLOGY**

We use a mixed research design that begins with a qualitative comparative research design, and then it is followed by quantitative regression analysis. For the qualitative research design, this study applies a comparative case study approach to investigate the social welfare models of Mongolia and South Korea. Although there are many possible options of qualitative research methods, we selected and employed the comparative research method “Most Different Systems Design (MDS)” in this study because this method is the most appropriate when completely different cases with the same outcomes or common issues are compared (Anckar, 2008). Mongolia and Korea are completely different cases that differ significantly in historical background, economic development, and institutional structure, but both countries have challenge to enhance their welfare policy effectiveness and equity.

To meet the requirement of an internationally recognized systematic analysis “MDS”, this study employed a structured and focused comparison with the same analytical criteria for both cases. The analytical criteria consist of two types of key dimensions that are derived from the theoretical frameworks of this study. The first criterion is the dimension of effectiveness that is measured by poverty reduction, coverage of benefits, and social outcomes. The second criterion is the dimension of equity that is measured by income distribution, access to services, and inclusion of vulnerable groups.

Due to the pre-defined, consistent analytical framework outlined above, we have a full opportunity to conduct a valid, reliable, and accurate comparison of the similarities and differences between two different welfare models in Mongolia and Korea and generate in-depth knowledge on how different welfare models influence social policy outcomes.

For the quantitative research design, we apply a comparative quantitative research design for cross-national analysis to examine the effectiveness and equity in Mongolia and South Korea. This study uses the secondary data collected from the World Bank. In this study, the key explanatory variable is the social expenditure as a percentage of GDP, and the key outcome variables are effectiveness and equity. This study relies on the indicators of poverty rate and unemployment rate to measure the effectiveness, and uses the Gini coefficient to measure equity.

Based on the quantitative data described above, the study applies descriptive statistical analysis and trend comparisons to explore differences and similarities between Mongolia and South Korea over time. This approach allows us to conduct a systematic analysis of how welfare systems influence social outcomes in different institutional contexts.

### **COMPARATIVE ANALYSIS OF WELFARE SYSTEMS**

The systematic comparative analysis of social welfare systems in Mongolia and South Korea exposes both institutional differences and shared difficulties in significantly enhancing social policy effectiveness and equity. Even though both countries have expanded their welfare systems to address socio-economic developments, different institutional and historical settings define their approaches. While examining the past and present variations between the two nations, we found that their unique historical and institutional development routes help us define structural variations between the social welfare systems of Mongolia and South Korea. Mongolia has created a mixed and transitional welfare system strongly affected by its post-socialist change as the structural variation is shown below in a table. The Mongolian welfare system has developed social insurance, social support, and universal programs during the transitional period and economic downturns, including the Child Money Program (CMP) that offers cash transfers to households with children. This welfare system and broad programs have significantly increased social protection and concentrate on helping disadvantaged groups. International assessments, on the other hand, show that Mongolia's system has difficulties in significantly enhancing its social policy effectiveness by correctly identifying the intended target group, boosting administrative capacity outside of political influence, and ensuring financial sustainability.

Unlike Mongolia, South Korea's welfare still relies more on a productivist welfare capitalism affected by its developmental state model, in which social policy has been defined in accordance with economic goals and rapid industrialization. Consequently, the system depends heavily on social insurance mechanisms parallel to private and family-based support. However, due to global economic and political crises, South Korea has been moving towards a more institutionalized welfare

structure that is built on key pillars such as universal health insurance, public pensions, employment insurance, and long-term care insurance. This fact shows that relatively strong institutions and stable policy frameworks lead to a mature and well-structured welfare state. Although the Korean welfare system has established near-universal healthcare coverage and greatly expanded social protection, it still relies heavily on private funding and family support. Additionally, compared to other advanced economies, Korea has relatively low social expenditure. Based on this scenario, we conclude that the Republic of Korea has a hybrid model of social welfare by combining elements of both state provision and market-based solutions.

*Table 2. MDS Analysis of Mongolia and South Korea Welfare Systems*

<b>Dimension</b>	<b>Mongolia</b>	<b>Korea</b>
<b>Welfare Model Type</b>	Transitional / Mixed system	Productivist with corporatist-liberal features
<b>Historical Context</b>	Post-socialist transition (since 1990s)	Rapid industrialization (developmental state)
<b>Main Components</b>	Social assistance, social insurance, universal benefits (e.g., child money)	Social insurance dominant, supplemented by private and family support
<b>Main funding source</b>	State budget + social insurance; greater vulnerability to financial and commodity cycles	Tax-funded support combined with payroll-based social insurance; more stable financial base
<b>Coverage</b>	Expanding but uneven, especially in rural areas	Broad coverage, but gaps for non-regular workers
<b>Poverty Reduction</b>	Moderate impact; still vulnerable to economic shocks	Significant reduction, but relative poverty remains high
<b>Equity (Distribution)</b>	Challenges in targeting and efficiency	Inequality persists despite welfare expansion
<b>Role of Family/Private Sector</b>	Moderate	Very strong reliance
<b>Key Challenge</b>	Sustainability and targeting	Inequality and the dual labor market

In terms of effectiveness, South Korea shows better results in lowering poverty and increasing coverage, mostly because of its better-developed economy and strong bureaucratic capacity. But gaps still exist, especially for people who work part-time or who are poor. Conversely, Mongolia has made progress in increasing welfare coverage, but its effectiveness is limited by financial resources that depend heavily on the price fluctuations of global mineral commodities and are very sensitive to election results, political appointments, and economic instability, which negatively influence the sustainability of social programs.

In terms of equality, both nations have significant difficulties. Mongolia faces challenges with fair distribution and effective benefit targeting, especially in underprivileged and rural communities. South Korea, meanwhile, although its

welfare system is more evolved, nevertheless suffers from considerable income inequality and disparities in access to social protection, mostly because of its dual labor market and reliance on family assistance.

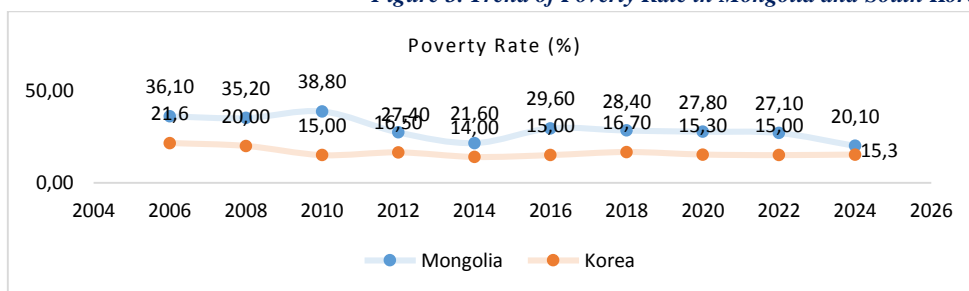
Overall, the comparison highlights that while South Korea’s welfare system is more advanced in terms of effectiveness, it does not fully achieve equity. Conversely, Mongolia’s system reflects efforts toward inclusivity but remains limited in effectiveness due to structural and economic constraints. These findings suggest that different welfare models produce varied outcomes, and achieving both effectiveness and equity remains a challenge for both countries.

Overall, this comparative qualitative analysis shows that although South Korea's welfare system has been quite successful in terms of effectiveness, the country still has serious inequality issues in fully achieving equity. Mongolia's system, on the other hand, shows that they are trying to build a more inclusive society, but Mongolia’s economy and social policy have not been sustainable enough to achieve its inclusivity goal. These results show that different welfare models in Mongolia and Korea have produced different results, and neither nation has yet attained equity and effectiveness.

### QUANTITATIVE ANALYSIS OF POVERTY AND EQUITY TRENDS IN MONGOLIA AND KOREA

Descriptive and inferential statistical analysis of the effects of social welfare systems in Mongolia and South Korea shows important results that we present in this section. It focused on comparing the changes in equity and effectiveness trends. The poverty rate trends for Mongolia and South Korea show clear differences in both level and stability over time. Mongolia has a high and unstable poverty rate, peaking at nearly 40% around 2010 before dropping sharply in the following years. However, this reduction does not last, as poverty levels rise again after 2014. This indicates that Mongolia’s welfare policy sustainability has been vulnerable to economic shocks and global commodity price fluctuations of mineral resources. This pattern suggests that social welfare programs may have short-term effects, but their long-term success is not sustainable.

*Figure 3. Trend of Poverty Rate in Mongolia and South Korea*



In contrast, South Korea has consistently lower and more stable poverty rates during the observed period, usually between 14% and 21%. Although there are some minor changes, the overall trend shows a fairly strong system capable of reducing extreme poverty. Still, the ongoing presence of moderate poverty indicates that, despite its solid institutions, South Korea's welfare system does not completely eliminate poverty, especially among vulnerable groups. Overall, the comparison shows that South Korea's welfare system is more effective at maintaining stable poverty reduction, while Mongolia's system experiences more noticeable fluctuations. These results support the idea that institutional strength and economic stability are key in shaping welfare outcomes.

The descriptive statistical analysis provides a helpful starting point for understanding poverty trends in Mongolia and South Korea. It shows that Mongolia not only has a noticeably higher average poverty rate compared to South Korea, but it also experiences greater fluctuations over time. By contrast, South Korea presents consistently lower and more stable poverty levels, pointing to a more resilient and sustainable welfare system.

Building on these observations, we developed two related hypotheses to explore how the national context may affect both the poverty level and the sustainability of social policy. First, we argue that the mean poverty rate in Mongolia is significantly higher than that in South Korea. Second, we propose that Mongolia's greater exposure to global commodity price fluctuation leads to more variability in its poverty rates compared to Korea.

To test the first hypothesis, we conducted an independent samples t-test. As shown in the Table 3, there is a statistically significant difference in the mean poverty rates of Mongolia and South Korea ( $t = 6.207$ ,  $p = 0.000007$ ). This finding confirms that South Korea's welfare system is more effective at maintaining lower poverty levels and ensuring more stable social policy outcomes than Mongolia.

*Table 3. Independent Samples T-test Result of Hypothesis 1*

Variable	Country	Mean (%)	Std. Dev.	t-value	p-value
Poverty Rate	Mongolia	29.21	6.0254	6.207	0.000007
	South Korea	16.44	2.4527		

To take a closer look at how changes in global commodity prices affect poverty, we carried out a paired samples t-test comparing poverty levels in Mongolia before and after the period of economic expansion driven by rising commodity prices. The descriptive data show that poverty declined greatly during the mining boom but rose again after the downturn. This suggests that the gains in poverty reduction were not sustained in Mongolia during periods of economic contraction.

Based on this, in this study, a paired samples t-test was conducted to examine changes in poverty rates before and after the period of economic expansion.

The results show that the mean poverty rate dropped significantly from 35.30% (SD = 3.32) to 26.96% (SD = 3.11). This difference is statistically significant ( $t = 3.95$ ,  $df = 4$ ,  $p = 0.017$ ), leading us to reject the null hypothesis. Overall, these findings suggest that the economic expansion was linked to a meaningful reduction in poverty, even though those improvements were not maintained over time.

*Table 4. Paired Samples T-test of Hypothesis 2*

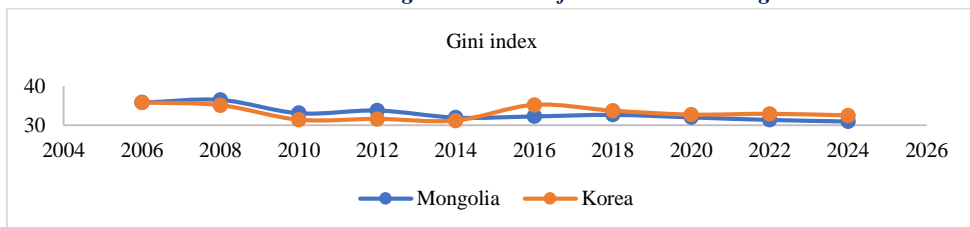
Variable	Country	Mean (%)	Std. Dev.	t-value	p-value
Poverty Rate	Mongolia	35.3	3.3181	3.948	0.017
	South Korea	26.96	3.1093		

In addition to the inferential analysis, we performed descriptive statistical analysis again to explore how Mongolia and South Korea perform in terms of equity, based on our theoretical framework. The trends in the Gini index provide a useful lens for understanding how income inequality has evolved in both countries over time.

As illustrated in Figure 4, both countries show fluctuations in inequality, but the patterns differ in meaningful ways. Mongolia experienced relatively high levels of inequality in the late 2000s, followed by a notable decline around 2010–2011, a period that coincided with policy expansion and broader economic shifts. After this drop, inequality remained fairly stable, with only modest improvements in recent years. South Korea, on the other hand, follows a different trajectory. Inequality decreased significantly in the early 2010s but rose again around 2015 before leveling off. This pattern indicates that even with a more institutionalized welfare system, South Korea continues to face persistent inequality challenges. The increase in inequality may be linked to structural factors such as labor market dualism and a continued reliance on private and family-based support.

Taken together, the comparison shows that neither country has fully achieved equitable outcomes. Mongolia’s inequality remains moderately high and relatively stable, while South Korea, despite stronger institutional capacity, still experiences fluctuations tied to deeper structural issues. These findings highlight that improvements in welfare effectiveness do not automatically translate into greater equity, highlighting the complexity of pursuing both goals at the same time.

*Figure 4 Trends of Gini Index in Mongolia and South Korea*



## DISCUSSION

This study looks at how effective and equitable social welfare systems are in Mongolia and South Korea by combining quantitative analysis with qualitative insights from policy documents and existing research. The results point to clear differences in outcomes and show how both economic structure and institutional strength shape poverty reduction and inequality.

The quantitative findings, particularly from the descriptive statistics and statistical tests, show that poverty rates are significantly higher in Mongolia than in South Korea. Qualitative evidence helps explain this gap. In South Korea, the welfare system is rooted in a developmental state model, supported by strong bureaucratic institutions, universal health coverage, and well-established social insurance programs. Together, these features contribute to more stable and consistent poverty reduction.

By contrast, Mongolia has expanded welfare coverage through programs such as the Child Money Program, but it continues to face important constraints. Its fiscal capacity is highly dependent on global commodity price fluctuations, while administrative efficiency and policy targeting are often shaped by political cycles and election outcomes. These factors help explain why poverty levels in Mongolia remain both higher and more volatile over time.

The paired samples t-test further illustrates how economic cycles shape welfare outcomes in Mongolia. Poverty fell significantly during the commodity boom but rose again after the downturn. Qualitative evidence aligns with this pattern, showing that Mongolia's welfare system is closely tied to government revenues from the mining sector. When the economy is strong, increased revenues allow for expanded social spending. When it slows, fiscal constraints limit the government's ability to maintain those benefits. This dynamic helps explain the instability and limited resilience of poverty reduction over time.

Looking at the Gini index adds another dimension by focusing on equity. Although both countries experience fluctuations in inequality, the underlying drivers differ. In South Korea, inequality is often linked to structural issues such as labor market dualism, where non-regular workers have fewer protections, and continued reliance on family-based support. In Mongolia, inequality is shaped by regional disparities, especially between urban and rural areas, as well as uneven access to services. These factors help explain why reductions in poverty do not always translate into meaningful improvements in income distribution.

Taken together, the combined quantitative and qualitative evidence suggests that welfare outcomes depend not just on policy design, but also on the broader economic and institutional context. Mongolia's system shows a degree of inclusiveness and adaptability, but remains highly sensitive to external shocks due

to its reliance on commodity-driven growth. South Korea's more institutionalized system delivers greater stability in poverty outcomes, though it still faces ongoing challenges in addressing inequality.

These findings support the idea that welfare systems need to be evaluated within their wider context. Productivist systems like South Korea's may achieve stable poverty outcomes without fully resolving inequality, while transitional systems like Mongolia's may expand quickly but struggle to sustain long-term gains. There are also some limitations to keep in mind. The quantitative analysis is based on a relatively small sample, and the qualitative component draws on secondary sources rather than primary data. As a result, the conclusions should be treated as exploratory. Future research could strengthen the analysis by incorporating primary data, such as interviews or case studies, to better understand how policies are implemented and experienced.

Overall, the study underscores the importance of economic diversification, institutional capacity, and thoughtful policy design in achieving welfare systems that are both effective and equitable.

## CONCLUSION

In conclusion, this study compares the social welfare systems of Mongolia and South Korea, focusing on their effectiveness in reducing poverty and promoting equity. By combining statistical analysis with qualitative insights, it shows how different welfare models operate under distinct economic and institutional conditions. The findings suggest that South Korea's welfare system is more effective in maintaining consistently low poverty rates, supported by strong institutions and a diversified economy. Mongolia, by contrast, experiences higher and more volatile poverty levels due to its reliance on commodity-driven growth. Although poverty declines during periods of economic expansion, these gains are difficult to sustain during downturns, revealing structural vulnerability.

At the same time, neither country has fully achieved equitable outcomes. South Korea continues to face structural inequality linked to labor market dualism and reliance on family support, while Mongolia's welfare expansion has had only a limited impact on reducing disparities across regions and social groups. These patterns highlight that poverty reduction does not automatically translate into greater equity.

Overall, the study underscores that welfare effectiveness and equity depend not only on policy design but also on broader economic and institutional contexts. A stable and diversified economy, combined with strong administrative capacity, is critical for sustaining welfare outcomes over time.

The findings also carry policy implications. Mongolia would benefit from strengthening fiscal stability, improving targeting mechanisms, and reducing dependence on commodity revenues. In South Korea, addressing structural inequalities, particularly in the labor market and among vulnerable groups, remains essential for improving equity.

While the study provides useful insights, it is limited by a small sample size and reliance on secondary data. Future research could build on this by using longer time-series data and incorporating primary qualitative evidence to deepen understanding of welfare system performance.

Ultimately, achieving both effective and equitable welfare systems remains a complex challenge, requiring not only well-designed policies but also resilient economic structures and inclusive institutions.

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