

A Framework of Halal Industry Support System in non-Muslim Country: A Focus on South Korea

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ABSTRACT

Following the significant growth of the global halal market, not only Muslim society, but non-Muslim majority society has embraced and put effort to establish strategies to be involved in the paradigm of halal industry. However, it has been shown that accepting and embracing halal industry as a non-Muslim country has various dimensional difficulties such as social collision, lack of efficiency, and limited comprehension in the halal support system. South Korea thus far has tried to fit its halal industry into a dominantly constructed paradigm, and actively took actions to penetrate the Islamic market starting from food and beverage products with active government supports. This present work focuses on Korean halal industry with reference to the more established halal industry ecosystem in Malaysia. To study the halal ecosystem, the concept of halalan toyyiban as shariah compliance (fundamental Islamic value system), business ecosystem theory (Moore, 1996), and Systems Theory of Political Science (Easton, 1965) have been applied as major philosophies. It was shown that a support system hierarchy encompassing the policy, system and approach level may help Korea achieve its optimal potential in halal industry. At approach level, Halal Industry Support System Sequence Map (HISSSM) is seen to be able to serve as a tool for effective intercommunication of multidimensional industry stakeholders leading to creation of synergy and improved halal industry ecosystem in Korea.

Keywords: Halal Industry; Halal Korea; Halal Ecosystem; Halal Support; Halal Policy; HISSSM

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Introduction

After its emergence, halal industry was recognized and considered as one of the fastest growing business in the world during the last two decades. This phenomenon is due to the transformation of the conceptual meaning of the halal industry (Evans & Syed, 2015). In the past, halal industry was limited to only meat and poultry especially the slaughtering methods. However, this concept has been expanded to the whole supply chain under the agenda of the halal integrity (Evan & Syed, 2015). We have seen dynamic movement not only from Muslim society, but also demands from non-Muslim consumers regarding food safety concerns (Jusoh, Kamarulzaman & Zakaria, 2017). On the other hand, circumstantial factors such as globally spread nationalism, protectionism (Mohan 2018), tilted export countries (Jung & Lee, 2015), and economic growth depression have been threatening national economic security lately.

In this circumstance, the South Korean market saw the halal industry as a fast growing and an attractive unexplored potential market. Hence, Korea began to join the halal industry in earnest. As an initial movement towards the unexplored industry, the government has actively supported industry players albeit the many challenges. Although the halal industry was perceived as a new opportunity, it also brought social conflicts (Kwon, 2016).

Therefore, in order to promote halal industry and its derivatives, government support is inevitably required. Thus, in this research, existing challenges of government support such as lack of diversity, efficiency, and necessity to handle existing social conflicts are highlighted. Amendments and reinforcement of the current support system are needed to ensure global market competitiveness for the local industry. In this paper, we will discuss sequential promotion approach and its significance as a countermeasure to overcome these challenges.

Research Background

Fundamental of Halal

The concept of halal is not only a fundamental teaching of Islam, it is also an imperative responsibility for Muslims according to the primary source of shariah; the Holy Quran. The literal meaning of *halal* in the Arabic language can be translated as permissible or lawful. On the other hand, *haram* can be translated as impermissible, prohibited, or unlawful.

The two concepts; halal and haram, interact with each other to determine the whole lifestyle of Muslim believers (Omar, et, al., 2012). As such, the term halal covers a broad scope; not only food and beverage consumption, but also business, trade, human relations, finance, and every aspect of behaviour (Samori, et, al., 2014).

Previously, halal industry focused only on live stocks and shariah-based slaughtering, but a more dynamic aspect was introduced that covered different dimensions such as business beyond non-meat products under the agenda of halal integrity (Evans & Syed, 2015). The Malaysian standard (MS 2400-3:2010) defines the *halalan toyyiban* concept as assurance and guarantee in the context of integration of holistic teaching and balanced requirements to meet the stipulation of the condition, situation, or application (Department of Standards, Malaysia). In addition, Halal Development Corporation described that the halal industry's growth is derived from the value proposition based on the concept of the *halalan toyyiban* (HDC, 2014).

The most recently introduced concept of the halal industry can be seen as a compilation of two different value systems, namely religious and universal systems which makes halal industry goes global (Park & Jamaludin, 2017). In the aspect of divine value, it can be described as a part of halal which is rooted at the authority of Islamic primary legal maxim allowed sources and methods in the industry (Omar et al., 2012). On the other hand, in the case of universal value in halal industry, it covers the commonly practiced and recognized principles around the globe such as food safety (Saidin, Rahman, 2016), ethics, eco-friendly, and hygiene (HDC, 2014). When those value propositions are practiced in the industry under the name of halal integrity, the requirement of the halalan toyyiban can be truly fulfilled.

Global Halal Industry Trend

Globally, halal industry has been focused as one of the fastest growing industries. Global Muslim market scale across the lifestyle sector was valued at USD 2 trillion dollars in 2016 while Islamic finance sector stood at USD 2.2 trillion dollars (Thomson Reuters, 2017). In a more detailed manner, the food and beverage sector which is the biggest fraction of the halal industry market was valued at USD 1.24 trillion, apparel and media sections stood at USD 254 billion and USD 198 billion respectively, tourism at USD 169 billion and USD 83 billion for pharmaceuticals and cosmetics (Thomson Reuters, 2017).

The global Muslim market scale it is expected to further grow due to several factors; the fast and continuous growth of global Muslim population (Park, 2017), increased economic capacity of Muslim society (Hwang et al., 2015), and value consumption pattern (Lim, 2016). According to PEW research centre (2017), the global estimated Muslim population was 1.8 billion, which was about 24 % of global population in 2015 and it is expected to be 3 billion, which is 31 % of global population in 2030 and an expected growing rate of between 32 % to 70 % in the next decades. Following the fast population growth, the Muslim Market growth is also related to the rising incomes and high purchasing power in Muslim societies (HDC, 2014). Kawata, Htay and Syed (2011) focused on the younger generation's (Muslim and non-Muslim) purchasing power and pattern change as a proxy to the growth of halal market. Following the growth of purchasing power and income of the Muslim population, value consumption has appeared as one of the trends in Muslim society.

Basically, value consumption in the context of halal refers to consumption patterns that are based on Islamic practices and teachings directly connected with right value expansion (Lim, 2016). Mustafar & Borhan (2013) described Islamic ethical consumerism with significant major aspects, which are referring to the priority of needs, preserving and keeping maqasid al-shariah, complying principles of the halal and haram, quality consumption, celebrating individual and society maslahah, and the practice of moderation. However, beyond Muslim society, non-Muslim's acceptance of the halal products was shown to be in the same pattern (Wibowo & Ahmad, 2016). Eum (2013) explained it with the application of global value consumption pattern in the halal market which is compatible with value composition of Islamic ethics.

Challenges of Korean Halal Industry Support

Necessity of comprehensive approach

Korean halal industry was developed majorly under the Ministry of Agriculture, Food, and Rural Affairs with support from various entities to foresee not only certification, but also on other factors as well.

Research has shown that in South Korea, certification system building, application method, and justification are linked with market strategy. For general discourse regarding the halal certification, Kim (2015) conducted a research in regards to remarks of the halal market in the Middle East and the challenges in the application of halal certification in Korea. Han et al. (2017) conducted a market survey regarding preference and recognition of Korean products in Malaysia to set export strategy while approaching customer's purchase behaviour and pattern toward halal food products. Han & Lee (2016) suggested an expansion of a definite number of halal-certified products especially raw materials that can help to protect domestic agricultural products. Kang & Ra (2016) described the positive effects that various policies support including certification which helps halal export promotion through the Malaysian case study. Additionally, Park (2016a) discussed the necessity to understand about the political and social background of individual countries instead of the general perspective of Islam to set strategies for penetration of the targeted market regarding certification. In a global eco-political aspect, Park (2016b) discoursed about the implication of Indonesian enactment No.33/2014 The Halal Products Certification which will be enforced from 2019 while reviewing the incompatibility between N0.33/2014 and WTO.

From another aspect, Seo & Jeong (2018) emphasized on the necessity of policy support which provides each countries' market trends and certification details via Korea Agro-Fisheries & Food Trade Corporation (a.T) or Korea Trade-Investment Promotion Agency. Han & Lee (2016) added the necessity of guideline for the halal certification index and production based on the certification body with system establishment for obtaining information conveniently. In this perspective, Kim (2017a) focused on investment and support for visual market information for the halal industry promotion.

At domestic level, the insufficiency of human resource to support and train local industry is considered as one of the major challenges faced (Hong, 2015). Han & Lee (2016) claimed that development on research centre and laboratory which can conduct professional research and analysis are required beyond certification area. Jun & Han (2018) also suggested to promote halal industry to Koreans through SWOT analysis approach and pointed out that halal food policy lacks information and experienced human resources.

Lastly, Chung and Kim (2015) conducted structural research on the necessity of halal industry promotion act (tentative name) to foster a foundation to lead the development of the halal industry in Korea and emphasized on the sub-agencies' role under the act as an action group. Following this idea, Hong (2015) argued the requirement of comprehensive cooperation among government, industry, academy, and research centre to set realistic and effective halal industry development approach.

Necessity of Efficiency

Since Korean government announced new measure regarding halal food industry development and export promotion in 2015, various dimensional efforts have been conducted on a government level toward halal industry. Therefore, Ministry of Agriculture, Food and Rural Affairs (MAFRA) has conducted and planned relevant policy which is agri-food export promotion, associating with Korea Agro-Fisheries & Food Trade Corporation (aT). However, due to lack of infrastructure, information, standards, global authority, awareness, and supply chain, it failed to show remarkable outcomes (Jun & Han, 2018). Seo & Jeong (2018) also pointed that although diverse measures have been conducted and provided toward industry as input, output is merely showing its significance of actual development and promotion.

In this circumstance, Chung and Kim (2015), proposed the establishment of entity or department to manage halal industry promotion policy exclusively in order to provide effective and efficient support. Kim (2015) proposed that multilateral cooperation is required; rather than individual effort to gain efficiency of Korean halal industry.

Reflection of Islam, Muslim and Halal Industry in South Korea

Along with the growth of the global halal market, Korea has also embraced and joined the halal industry. Since the introduction of halal industry in Korea in 2001 (Kim, 2017b), various attempts have been conducted by business players in the private sector to penetrate the Muslim market. Active government's involvement in the industry to assist domestic industry players to advance in Muslim market was introduced after summit's Mideast trip in 2015 (Han & Lee, 2016). In addition, current Moon's administration highlighted that Muslim market is a new opportunity for pluralizing skewed trade status under New South Policy. As such, government's support towards halal industry has continuously been taking place.

However, as implication of flux of halal industry in South Korea, the reflection of the social image of Islam in Korea was not perceived optimistically. While it is a distorted and groundless phrase, Koreans as well as westerners viewed Muslims as people holding Quran in one hand, and sword in the other (Lee, 2007). Korean society observed the Muslim world through the frame of Washington and Jerusalem and how it kept antagonizing with the Muslim world (Lee, 2007).

In addition to that, through cumulated negative perception which was derived from scenarios in the Muslim world such as terrorism, war, human rights violations, and inequality led to the formation of a general negative image of Islam which made non-Muslim societies reluctant to welcome Islam in its local society. Recently, significant issues surrounding Muslims in and outside of Korea have added negative public perception towards Islam. This includes, the Yemeni refugees issue in Korea, crimes committed by Muslim migrants in Korea, Korean kidnapping issue in Afghanistan, ISIL and Muslim extremists' terrorism toward soft target. Based on a Muslim refugee acceptance questionnaire, 44.7% responded that they refused refugees because of terror and crime coming from Muslim refugees and 21.9% are worried about potential religious and cultural conflict which may develop from cultural differences (KSOI, 2018). The Korean government has also received public criticism over the master plan of national food industry complex, called Foodpolis in which MAFRA planned to allocate specific space in the said complex for the halal industry players (JTBC, 2016).

Although the establishment of the halal industry complex plan was withdrawn -with an apparent public statement- due to the lack of demands of intended business players to join (Han & Lee, 2016), it triggered social discourse about halal industry. Various parties radically opposed not only Islam, but also the halal industry itself. Although through MAFRA's adequate explanation and elucidation, most of the speculations revealed as a groundless rumour, various speculation and dissents regarding the consequences of accepting halal industry in Korea still remain. Kim (2016) interpreted the expansion of halal industry in the Korean society as a sequence of Islamization of non-Muslim society with additional description of cultural collision. So (2016) also criticized Korean government for setting the halal industry development plan before preventing the Islamization of Korean society and conducting convergence of public opinion not only Muslim party and internal interest party, but to external opinions as well.

Research Method

This work focuses on Korean halal industry with reference to the established ecosystem in Malaysia. It is a continuum from a conceptual model of a triangle halal ecosystem model (Park & Jamaludin, 2017) with the aim to build a strategical industrial framework for applying halal industry in a non-Muslim society. To study the halal ecosystem, the concept of halalan toyyiban as the fundamental Islamic value system, business ecosystem theory (Moore, 1996), and Systems Theory of Political Science (Easton, 1965) have been applied as major philosophies.

Data was collected from books, news articles, and government agency's documents (majorly from Ministry of Agriculture, and Food and Rural Affairs (MAFRA), Korea and the Malaysian Halal Industry Master Plan 2.0 (2018-2030). Information was categorized into two distinct categories, namely the Korean and Malaysian case for critical analysis prior to development of models and potential solutions.

Finding and Discussion

Korean government has actively provided support to industry players through various channels, but in comparison to the input, the outcomes have been sub-optimal. Table 1 showed various institutes and agencies in Korea that have provided supports for industry players in the form of financial aid, training, R&D and export.

Table 1: Current State of Halal Industry Support by Various Institutes and Agencies in Korea
Source: Collected, modified and added from Choi (2018); Kim (2015) and individual organizations' websites

Type	Institute	Supporting Area	Details
Administrative Agency	Rural Development Administration	- Halal food contents R&D - Information	- Halal food R&D task force launching: - Providing guideline for raw material of halal food - Analysis on certification standard of each country - Providing halal recipe of Korean food
	Korea Forest Service	- Halal certification of forest products	- Supporting halal certification of forest products - In-depth research on major halal markets - Participation in exhibition - Supporting prior market test

	the Small and Medium Business Administration	- Financial assistance for halal certification	- A graded financial assistance of acquisition cost for global standard certification depends on government contribution limit and scale of sales.
	Gangwon Provincial Government	- Financial assistance for halal certification	- Providing financial support - KRW 9.5Million / company (Max 80% of total expenses) - expenses = certification cost + examination test + consultation coast
	Gyeongnam Provincial Government	- Financial assistance for halal certification	- Developing a plan to achieve 200 halal certified companies until 2019 through investing KRW 2billion - providing KRW 3million for certification cost per company
Government agency	National Fisheries Research & Development Institute	- Information - Consultation	- Providing halal certification information for aquatic products and food of individual countries - Analysis for raw materials and products - Aquatic food contents development for export depending on targeting countries - Providing information and consultation for improvement of aquatic food products export market
Public Institution	Korea Agro-Fisheries & Food Trade Corporation (aT)	- Cost of halal certification	- Providing 90% of financial support for the cost of certification and its renewals - Cost of screening, registration, commission etc. - Limit of support: KRW 20milliom
	Korea Food Research Institute	- Halal food contents R&D - Certification support	- Establishment of halal food Task force team - Supporting halal food R&D for export purpose - providing analyzed halal guideline depending on individual countries - supporting halal certification of Korean traditional food
Others	National Agricultural Cooperative Federation	- Export supporting	- (plan) KRW 10billion-scale support for new participation in halal industry
	Korea Institute of Halal Industry	- Consultation - Training	- Providing consultation and service on halal certification - Providing training service regarding halal certification
	Korea Halal Import Export Trade Association	- Consultation for market	- providing consultation and service regarding JAKIM and MUI -Packaged program: overseas buyer matching + obtaining halal certification (consultation cost support)
	Busan Technopark	- Financial assistance for halal certification - Financial assistance for Marketing on halal products	- Financial support regarding halal certification and consultation (Max: KRW 15million) - Supporting marketing (Max: KRW 4.25million) - Financial support regarding export of halal products

Even though various supports aimed at similar objectives toward upholding halal industry in Korea, the efforts have been conducted by different entities with lack of synergy. It is recommended that a comprehensive government support should be reinforced under one grand value of ‘cooperation’ that covers optimal approach, diversity, efficiency and harmony; that will be discussed further in the following section.

Halal Industry Support System Sequence Map (HISSSM)

The Halal Industry Support System Sequence Map (HISSSM) (Figure 1) is a diverse, efficient and harmonious approach of effective government support which can benefit halal

industry particularly in a non-Muslim country such as South Korea, where Islamic background environment is absent. HISSSM is designed based on Systems Theory of Political Science (Easton, 1965) and the business ecosystem theory (Moore, 1996).

The systems theory of Political Science, a view of politics, was first coined by Easton (1965) based on his behavioural approach towards politics. The operational structure of this throughput system consisted of input, output and feedback. Based on extracted output, feedback (positive or negative) are fed into the loop to achieve better output by re-input procedure. HISSSM is an applied model based on this basic format.

Meanwhile, the business ecosystem is a metaphoric concept combined by two components namely business and ecosystem, which could ecologically drive business environment. According to Moore (1996), business ecosystem is an economic community supported by interaction of organizations and individuals. Along with Moore's concept of business ecosystem, the premise of this model also emphasizes on active communication among stakeholders and triangle halal ecosystem (Park & Jamaludin, 2017) (Figure 2).

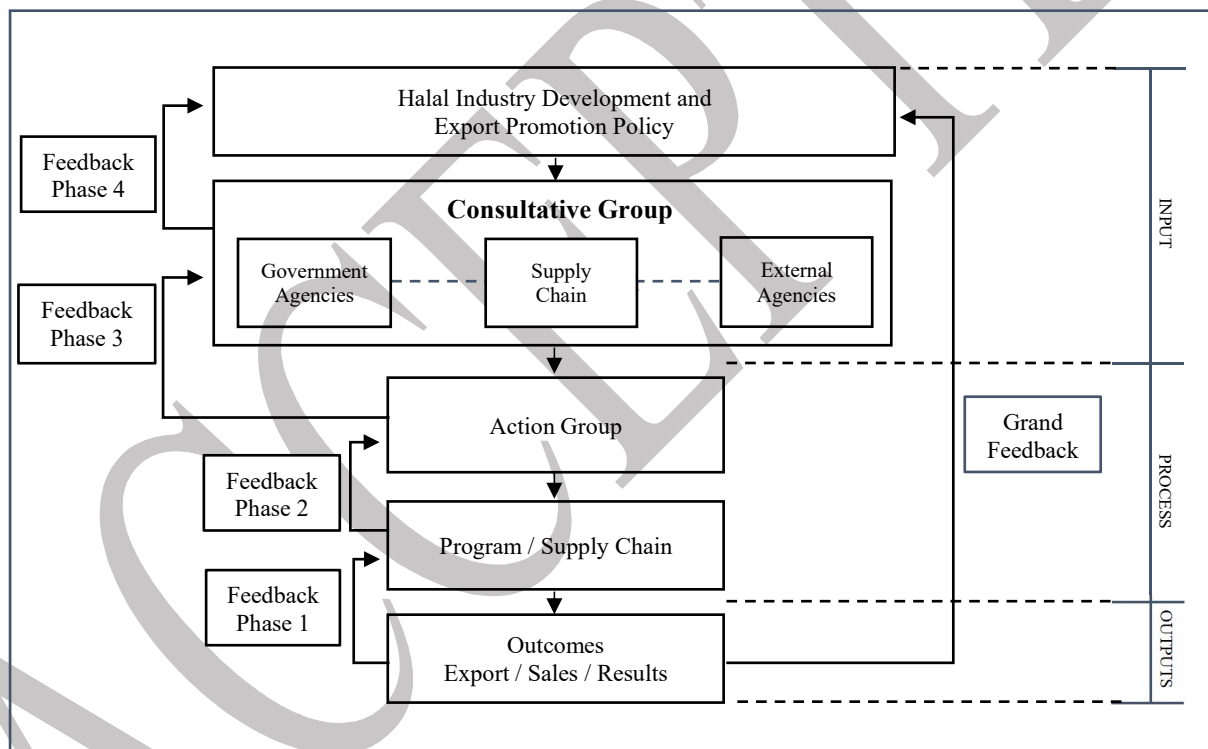


Figure 1. Halal Industry Support System Sequence Map (HISSSM)

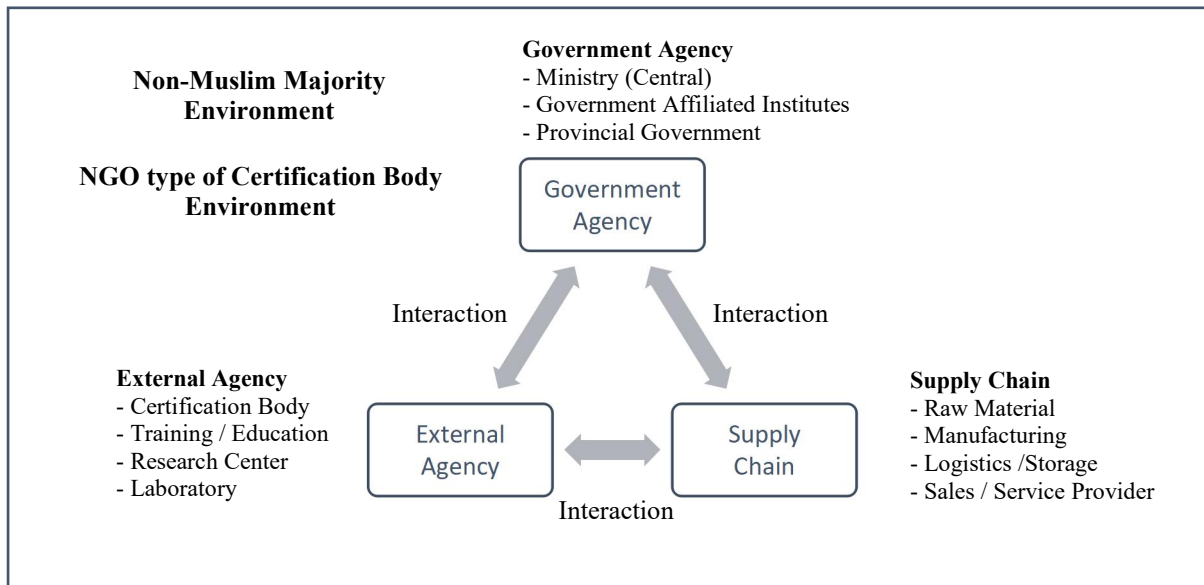


Figure 2. Triangle Halal Ecosystem Model

Source: Park & Jamaludin. (2017). *The Conceptual Model of Triangle Halal Ecosystem and Its Benefit in Korean Halal Industry*

Significance of HISSM

HISSM consists of three major elements namely; diversity, harmony and efficiency. To apply halal industry in non-Muslim society, value is the most essential premise. HISSM can lead a comprehensive approach to bring together multi-dimensional required supports through divers of interagency partnership among the various stakeholders of halal industry.

Structurally, consultative group is not an enacted legal entity, rather a cooperative group of industry stakeholders. Based on the Triangle Halal Ecosystem (Park & Jamaludin, 2017), the members of consultative groups are government agency, external agency and supply chain that work to seek industry sustainability and competitiveness through effective support.

In consultative group of HISSM, various representatives of stakeholders including government agencies work together to conduct direct discussion regarding development of halal industry from supply chain to administration level. This type of discussion can be considered as integrated opinion sharing which could highlight comprehensive and actual demands of industry players.

There are two major sequential aspects in HISSM, which are action group and feedback to maximize efficiency of support. Action group is a temporal or semi-permanent group of people that stems from the central group (consultative group). The action groups are allocated specific tasks to achieve a certain goal in a specific period of time. For example, for human resource development task, consultative group makes consensus and launch action group with relevant stakeholders such as university, laboratory, ministry of education and external agencies under the umbrella of linked policy.

Feedback is another element in HISSM. There are two types of feedbacks, phased feedback and grand feedback. Feedbacks must be conducted regardless of positive or negative outputs

to keep continuous development. In the case of phased feedback, it oversees each step of procedure as independent input-output system. In this micro feedback, direct communication between players can be shared to aim better cooperation and improvement. Meanwhile, grand feedback involves re-inputting final output into policy level. Being apart from cumulated phased feedback, grand feedback provides direct raw result toward policy makers. Thus, in the highest level of support decision makers can compare two different types of feedbacks to observe procedure more efficiently, effectively and comprehensively.

At present, South Korean halal industry agenda segregates between religion and industry; which is a challenge to the country’s halal industry. Through its holistic approach, it is foreseen that HISSSM is able to help Korea accept and apply halal industry in a more harmonious condition. As discussed about the consultative groups, there are various stakeholders that are positioned as members. In this circumstance, support towards halal industry can be extended beyond certification and marketing to include social movement, education and awareness. This may improve and correct skewed views of Islam in South Korea and help overcome various obstacles in the domestic halal industry. Figure 3 showed the support system hierarchy for halal industry development that can be implemented in Korea.

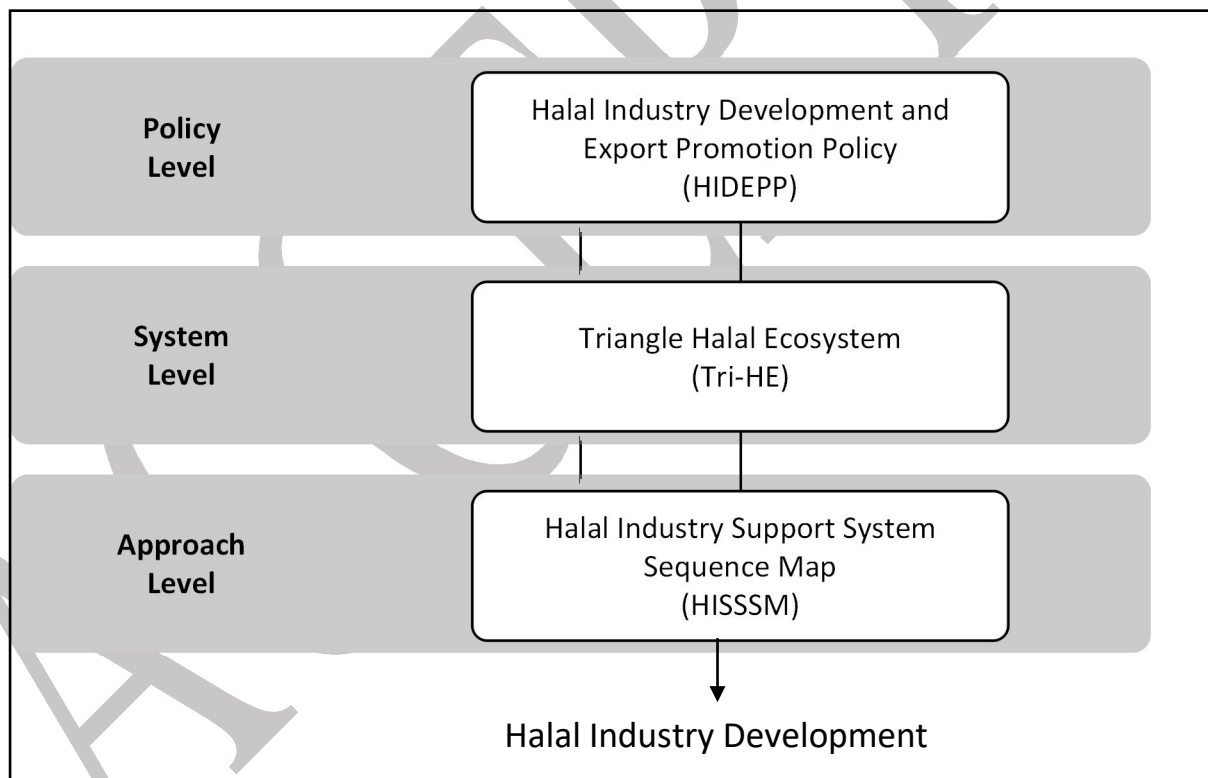


Figure 3. Support System Hierarchy for Halal Industry Development

Conclusion

It was shown that accepting and embracing halal industry as a non-Muslim country has various dimensional difficulties such as social collision, lack of efficiency, and limited

comprehension in the halal support system. South Korea thus far has tried to fit its halal industry into a dominantly constructed paradigm, and actively took actions to penetrate the Islamic market starting from food and beverage products with active government supports. This present work showed that a support system hierarchy encompassing the policy, system and approach level may help Korea achieved its optimal potential in halal industry. At approach level, Halal Industry Support System Sequence Map (HISSSM) is seen to be able to serve as a tool for effective intercommunication of multidimensional industry stakeholders leading to creation of synergy and improved halal industry ecosystem in Korea.

Conflict of Interest

The author declare no potential conflict of interest with respect to the research, authorship, and/or publication of this article

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