2025

VOLUME.4

ECCK CONNECT

EUROPEAN CHAMBER OF COMMERCE IN KOREA
주한유럽상공회의소


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TOAST PROPOSAL	V	V		
PROMOTION VIDEO PLAY (MAX 30 SECONDS)	V	V	V	
MARKETING MATERIAL IN ENTRANCE (DESIGNATED FORMAT)	V	V	V	V
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about us

The European Chamber of Commerce in Korea (ECCK) is committed to advancing the interests of companies from the European Union (EU) and European Free Trade Association (EFTA) member states as well as from the United Kingdom of Great Britain and Northern Ireland operating in Korea. Furthermore, it cooperates with organizations that have mutual interests to promote an optimal business environment and fairly represent the European business community.

Committees & Forums

There are 18 committees and 7 forums connecting businesses through networking, advocacy, and insights.

Events

The ECCK fosters a vibrant business environment through stakeholder engagement and events.

Publications

The ECCK shares publications on market trends, regulations, and social issues and conducts business confidence surveys.

The European Chamber of Commerce in Korea (ECCK) operates a total of 18 committees and 7 forums in 2025, following the establishment of new committees and forums, and structural adjustments. We appreciate the continued interest and support of our members and partners.

Committees

Heavy Duty Commercial Vehicles (2012)
Passenger Vehicles (2012)
Tires (2012)
Fashion & Retail (2012)
Intellectual Property Rights (2012)
Marine Industry (2012)
Insurance (2012)
Cosmetics (2012)
Logistics & Transportation (2012)
Chemical (2013)
Healthcare (2013)
Beer-Wine-Spirits (2014)
Kitchen & Home Appliances (2015)
Food (2017)
Aerospace & Defense (2018)
Energy & Environment (2019)
Digital (2019)
Sustainability (2022)

Forums

CFO (2012)
Taxation (2012)
HR & Compliance (2014)
CEO (2018)
Tourism (2019)
Future Development (2020)
Family Friendly Future Forum (2024)

For inquiries regarding committee membership: membership@ecck.or.kr
For collaboration inquiries related to committees and forums: jeonghyun.lee@ecck.or.kr

CONTENTS

ECCK White Paper 2025

The European Chamber of Commerce in Korea (ECCK) held a press conference on 25 September at the Korea Press Center to mark the publication of its ECCK White Paper 2025, which presents policy recommendations from European companies on Korea's regulatory environment.

Drawing on the work of its industry-specific committees and cross-sectoral forums, the ECCK engages in ongoing discussions on regulatory improvement and communicates the views of European companies to the Korean government. The White Paper compiles the issues raised by all committees and forums. This year's edition includes a total of 70 recommendations submitted by 15 committees and 2 forums. At the press conference, the Chairs of the Aerospace & Defence, Energy & Environment, Food, Healthcare, Passenger Vehicles, and Beer, Wine & Spirits Committees presented their key recommendations and engaged in a Q&A session with the media.

To open the press conference, Philippe van Hoof, Chairperson of the ECCK, highlighted that while Korea holds significant potential as an attractive investment destination, a predictable regulatory environment and fair competitive conditions are essential to translating this potential into tangible investments.

In the following congratulatory remarks, Walter van Hattum, Minister Counsellor and Head of Trade Section at the Delegation of the European Union to the Republic of Korea, underscored the long-standing trust-based partnership between Europe and Korea, and reaffirmed the EU's commitment to strengthening this partnership through openness, sustainability, and rules-based cooperation despite the shifting global landscape.

Stefan Ernst, President of the ECCK, added that this year's White Paper reflects the sustained efforts and contributions of the industry, and expressed his hope that it will serve as a foundation for fostering a more competitive business environment between Korea and Europe.

François Piolet, Chair of the ECCK Aerospace & Defence Committee, stated, "Europe and Korea have long maintained a strategic defence partnership grounded in mutual trust, and enhancing the transparency and predictability of the offset framework is a crucial step toward reinforcing sustainable and trusted cooperation." He added, "We hope this will allow Korea's defence ecosystem to become more closely connected to global value chains and create new growth opportunities for Korean SMEs."

Hyun Seung Lee, Chair of the ECCK Energy & Environment Committee, noted, "This year's White Paper compiles industry proposals addressing real challenges and pending issues arising from offshore wind project development in Korea. We hope that Korea, which already has a strong industrial base closely linked to offshore wind, will integrate related industries to create new added value — and, in doing so, play a pivotal role in achieving carbon neutrality, strengthening energy security, creating jobs, and driving economic growth."

Thomas Caso, Chair of the ECCK Food Committee, urged the Ministry of Food and Drug Safety to expand the scope of permitted natural flavours to align Korea with global standards, benefiting both consumers and the food industry. Additionally, he called for enhanced communication methods for on-site inspections by providing official English versions of inspection standards and sharing detailed inspection results with foreign food facilities to promote transparency.

Ana-Maria Boie, Chair of the ECCK Healthcare Committee, remarked, “The European healthcare industry continues to face challenges in Korea around timely access, regulatory predictability, and fair valuation of innovation. We urge the Korean government to accelerate fast-track access for life-saving therapies, modernize pricing frameworks, and reform Risk Sharing Agreements to ensure patients benefit from innovation and Korea remains a priority destination for global healthcare investment.”

Andrew Hong-joong Kim, Chair of the ECCK Passenger Vehicles Committee, recommended that the current criminal penalty framework for regulating average vehicle emissions be converted into an appropriate administrative sanction, in line with the principle of proportionality in economic criminal law, and expressed hope for a positive review from the government.

Lastly, Frantz Hotton, Vice-Chair of the ECCK Beer, Wine & Spirits Committee, says "The current Korean e-commerce policy, which excludes most imported liquor products and is combined with an outdated ad valorem tax system, restricts market dynamics and limits consumer choice. This has created market imbalances and encouraged tax avoidance through overseas direct purchases. Modern, science-based regulations are needed to ensure fair access for all licensed retailers. At the same time, the imported liquor industry will continue to do its utmost to foster a culture of responsible drinking and maintain transparent communication with consumers."

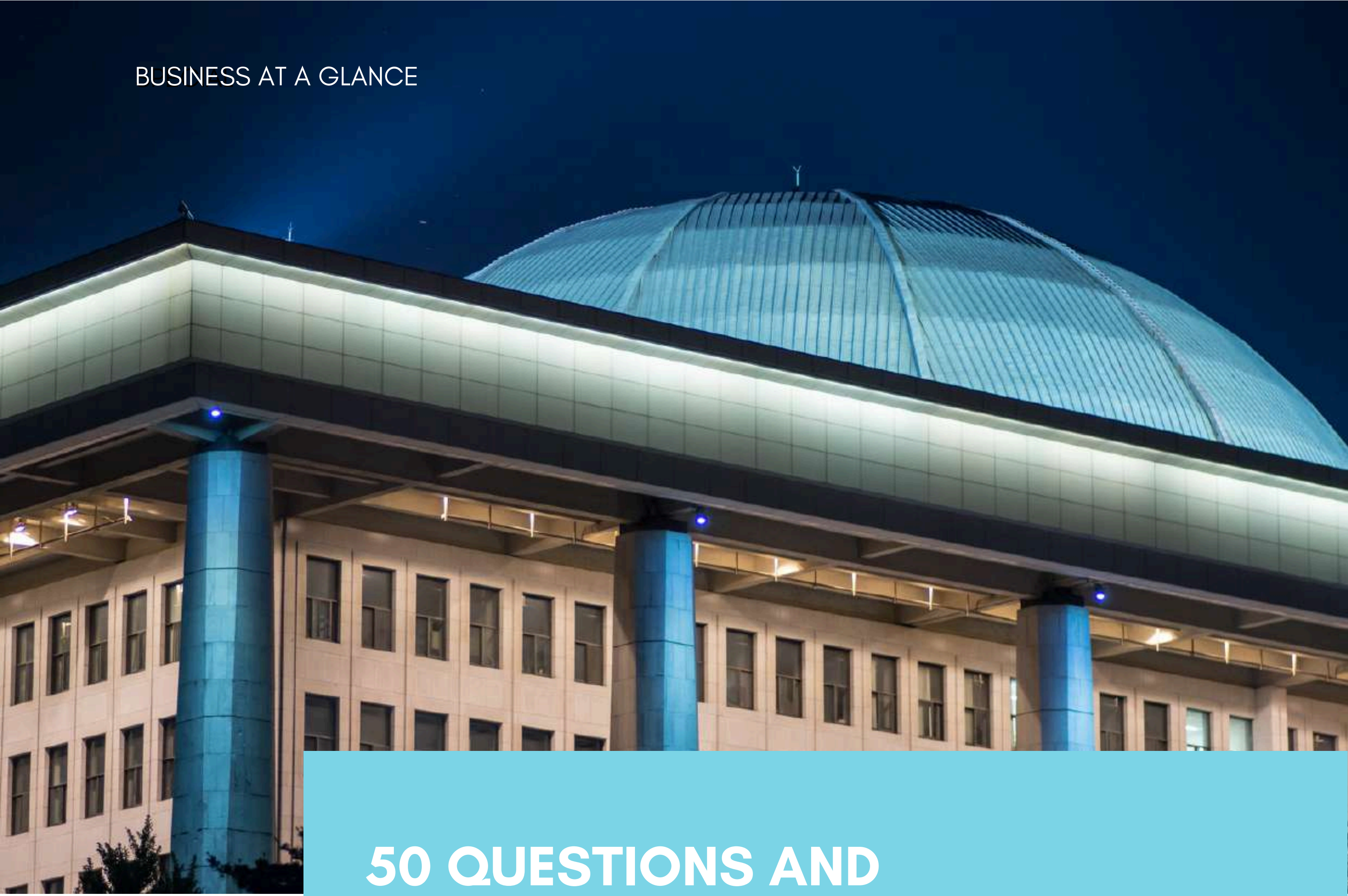
Among the 70 recommendations, 20 are issues raised again this year — some of which have been continuously submitted over several years. Another 18 are follow-up proposals on matters previously accepted or partially accepted, calling for more complete institutional and regulatory implementation. The remaining 32 are new issues arising from the changing market environment, which the industry believes require proactive responses.

The ECCK will continue to represent European companies and actively engage in close dialogue and cooperation with various government ministries to contribute to improving the business environment in Korea.

[ECCK White Paper 2024 Online Version - View ONLY]

About ECCK White Paper 2025

The 2025 ECCK White Paper covers 17 industry sectors (Aerospace & Defence, Automotive, Beer, Wine and Spirits, Chemicals, Cosmetics, Digital, Energy & Environment, Fashion & Retail, Food, Healthcare, HR & Compliance, Insurance, Intellectual Property Rights, Kitchen & Home Appliances, Marine Industry, Sustainability, and Taxation), presenting a total of 70 issues. The recommendations are based on the insights of over 200 experts from ECCK member companies and have been edited and produced by the ECCK Secretariat.



50 QUESTIONS AND 50 ANSWER ON THE YELLOW ENVELOPE ACT

SHIN & KIM

The so-called “Yellow Envelope Act,” or the amendment to the Trade Union and Labor Relations Adjustment Act (hereinafter referred to as the “Trade Union Act”), passed the National Assembly plenary session on August 24, 2025. The Act will go into effect on March 10, 2026.

The key provisions of the Yellow Envelope Act are as follows:

- **It expands the scope of “employer” under the Trade Union Act to include “any person who, even if not a party to the employment contract, is in a position to substantially and specifically control or determine the working conditions of employees”;**

- **It expands permissible strikes to include those concerning "business management decisions that affect working conditions" and "employer's clear violation of the collective bargaining agreements concerning wages, working hours, dismissal, safety and health, etc.";**

- **Persons who are not "employees" under the Trade Union Act may join a trade union; and**

- **It makes it more difficult for employers to seek compensation from trade unions or employees for damages caused by the union's illegal strikes**

The Yellow Envelope Act signals significant changes in corporate labor-management relations. Various issues, particularly concerning collective bargaining relationships between principal contractors and subcontractors and negotiation methods, are expected to become immediate matters of concern in practice. As the enforcement date of the Act is approaching, companies will need to closely review the possible impact on their business and make sufficient preparation.

The Labor and Employment Group at Shin & Kim has prepared 50 Questions and 50 Answers on the Yellow Envelope Act to clarify these changes and their possible impact on businesses and to help companies in their preparations. Going forward, we will continue to closely monitor the guidelines and interpretations of the Ministry of Employment and Labor as well as judicial trends, and support companies in responding effectively to the changes.

For further inquiries, please contact Shin & Kim's Labor and Employment Group.

CLICK HERE FOR MORE DETAILS

For Questions or Comments

Chanyoung Cho | Partner	**Ju-youl Yang** | Partner
Dong-Wook Kim | Partner	**Jong-Hyun Kim** | Partner
Anthony Chang | Senior Foreign Attorney	**Jaehyuk Chang** | Partner
Jong Soo Kim | Partner	**Sung Yong Jung** | Associate
Hye-young Yun | Partner	**Hyunsong Lee** | Associate
Woo-Yong Song | Partner	**Katie Younglee Tak** | Senior Foreign Attorney

AI WITHOUT BORDERS: MAKING OPEN-SOURCE AI KOREA'S STRATEGIC ADVANTAGE

CODIT

Open-source AI is reshaping the global digital landscape—fueling innovation, lowering entry barriers, and bolstering national autonomy in technology. Defined by the public release of models, training code, datasets, and documentation, open-source AI fosters openness, trust, and collective advancement. Unlike proprietary models—often costly, opaque, and tightly controlled—open-source systems enable real-time, global collaboration through platforms like GitHub and Hugging Face, dramatically accelerating iteration and widening access. For example, Meta's Llama family of models—made distinctive by the rare release of both code and weights—has already surpassed one billion downloads, underscoring how open-source practices can rapidly scale adoption and innovation.

Governments across the U.S., EU, China, and the U.K. are no longer treating open-source AI as a peripheral innovation. They are integrating it into national strategies as public infrastructure—investing in shared GPU resources, national data platforms, and AI-specific licensing frameworks to unlock innovation and advance public sector modernization.

For Korea, open-source AI represents a unique opportunity to make technological sovereignty a strategic advantage. The country already possesses world-class digital talent and an active private sector pushing boundaries in AI development. However, key public policy elements—such as legal definitions, infrastructure support, licensing guidance, and procurement systems—remain underdeveloped. Without clear governance and public investment, Korea risks being excluded from setting the norms and standards of next-generation AI innovation.

This paper outlines the value of open-source AI and proposes a five-part national strategy to help Korea close its systemic policy gaps and position itself as a trusted global leader in the open AI ecosystem.

1. What Is Open-Source AI and How Does It Work?

The definition of open-source AI remains fluid, but it generally refers to systems where models, code, datasets, weights, and documentation are released under licenses that allow free use, modification, and redistribution.[1] While rooted in the principles of open-source software—transparency, collaboration, and accessibility—open-source AI expands this ethos to include data governance, computing resources, and deployment frameworks.[2] The following table outlines the core components that constitute open-source AI systems.

<Table 1. Core Components of Open-Source AI>

Core Component	Description
Model Architecture	Structural design of models (e.g., Transformer)
Training Code	Algorithms and loops implemented in languages like Python
Inference Code	Scripts enabling deployment and use of trained models
Datasets	Training data along with licenses and documentation
Weights	Parameters learned from large-scale training; key assets of performance
Documentation	Usage guides, limitations, and feature explanations
License	Legal terms (e.g., Apache 2.0, MIT) that govern reuse

※ *Compiled from various documentation on open-source AI components.*

Open-source AI ecosystems thrive on the real-time release of core assets—such as model code, weights, datasets, and documentation—via platforms like GitHub and Hugging Face. These environments enable thousands of developers worldwide to collaborate, refine models, and build derivatives, accelerating progress and expanding access for startups and emerging-market developers.

1 ***The Linux Foundation, The Economic and Workforce Impacts of Open Source AI***, p.5, May 2025. Unless otherwise noted, this report is based on the sources cited therein.

2. Anaconda, Exploring Open-Source AI: Definition, Benefits, and Tools

To position itself among the world's top three AI powers (AI G3), Korea needs to go beyond investing in models, hardware, and talent. A critical factor will be the timely release and effective use of its existing high-quality data pools. Without guaranteed access to training data, even the most advanced computing resources and skilled developers will be insufficient to remain competitive. It is therefore essential to establish clear legal and institutional frameworks that allow lawfully collected private-sector data to be used for foundational model training. Such data utilization is not only cost-effective but also provides a foundation for Korean developers to adapt and innovate more effectively in the global AI ecosystem.

[Case Study 1]
Meta's Llama series is one of the most prominent open-source AI models, serving as the core of the ecosystem by making both source code and model weights publicly available for developers and researchers to freely use and expand. It can run on relatively modest computing resources and has already been downloaded over one billion times, underscoring its broad adoption. This openness and accessibility have created a foundation for startups and individual developers to actively participate in AI innovation. Released in April 2025, Llama 4 is a next-generation model capable of understanding not only text but also multimodal data such as images, leveraging a Mixture of Experts (MoE) architecture that combines computational efficiency with high performance. In particular, Llama 4 Maverick stands out as one of the largest open-source general-purpose multimodal LLMs to date, opening up large-scale experimentation that was previously limited and accelerating the expansion and application of the open-source AI ecosystem.

Unlike proprietary models that are costly and limited in flexibility, open-source alternatives offer transparency and adaptability. This has lowered entry barriers and fueled a wave of innovation, with models like Meta's Llama, Mistral, and Falcon giving rise to diverse spinoffs and specialized applications.

The rise of open-source AI reflects broader strategic motivations:

- Rising awareness of the limitations of proprietary AI model and growing demand for broader access

- Increasing public expectations for transparency, accountability, and explainability in AI
- Equitable AI access, especially for SMEs and developing countries
- Intensifying geopolitical competition over AI sovereignty

As a result, open-source AI is now being recognized as a policy-relevant technology that aligns with broader goals—such as cost efficiency, ecosystem diversification, skills development, and public sector innovation. Governments around the world are taking notice, moving to formalize support through infrastructure investments and legal frameworks.

2. Economic Impact and Changing Workforce Dynamics
Open-source AI is reshaping business economics and labor markets, particularly by leveling the playing field for smaller players and accelerating innovation.

(1) Wider Access for Startups and SMEs
Open-source AI is quickly gaining ground as an alternative to expensive, closed models—especially among startups and SMEs. Closed models often come with high API costs, limited access, and little flexibility for customization. Since they are controlled by a single company, users cannot fully understand or adapt the model, making localization and innovation difficult.

Open models, on the other hand, share pre-trained weights, code, and documentation. This allows anyone to use or fine-tune powerful AI without major investment. For companies lacking computing power or in-house R&D—especially in developing countries—this openness makes AI far more accessible.

For example, platforms like Hugging Face now host hundreds of models developed by smaller teams, freely accessible without the costs associated with commercial APIs. In Korea, the influence of open-source AI is also expanding rapidly, with many successful applications built on Meta's Llama models. As one of the first true open-source alternatives, Llama quickly emerged as a global standard. Its diverse versions and high degree of customizability have enabled research institutions and startups to localize and experiment with minimal barriers. By lowering entry costs and broadening participation, open-model ecosystems are creating new opportunities for a wider range of players to build and deploy AI solutions.

[Case Study 2]
KISTI (Korea Institute of Science and Technology Information) has developed KONI, a Korean-language generative AI model fine-tuned for science and technology, based on Meta's open-source Llama3-8B. Trained on domain-specific data, KONI achieved topperformance on the LogicKor benchmark—the first 8B model to score above 8. It is freely available via Hugging Face and KISTI's AIDA platform, showcasing the openness and scalability of open-source collaboration.

KISTI has applied KONI to build an internal Q&A system for science and tech regulations, integrating retrieval-augmented generation (RAG) to reduce hallucinations and improve accuracy. This demonstrates the potential of open-source LLMs to deliver reliable, domain-adapted tools for real-world use. KISTI plans to expand into other public sector needs, including defense and policy applications.

[Case Study 3]
AIM Intelligence, a Korean AI security startup, developed "Llama Suho," a content filtering model tailored to Korean social and cultural norms. Built on Meta's open-source Llama Guard 3-8B, the model achieved 99% accuracy in filtering harmful Korean-language content—up from 90.33%—by leveraging flexible, open-source fine-tuning that closed models cannot offer. This enabled both rapid prototyping and internalization of core technology.
The project was recognized as an Asia-Pacific winner of Meta's "Llama Impact Innovation Awards," validating open-source AI's potential for socially impactful applications. Based on this success, AIM Intelligence secured major enterprise clients in high-security industries such as telecommunications and finance and successfully commercialized the model. In 2025, the company raised KRW 1.85 billion in pre-Series A funding from both institutional and early-stage investors.

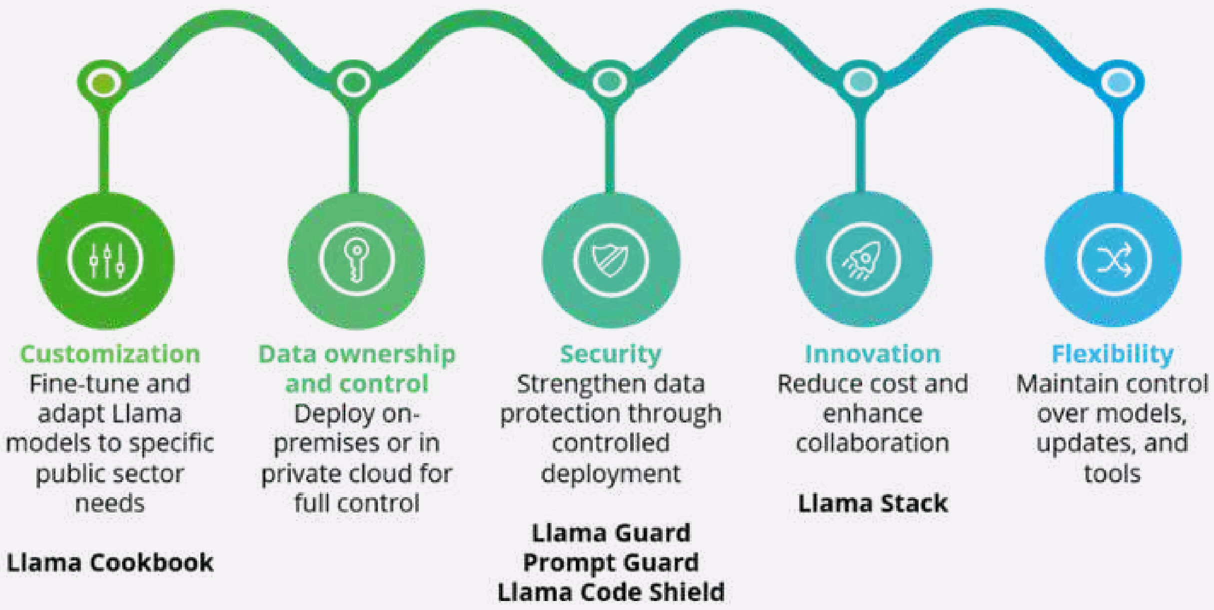
(2) Cost Savings, Tech Sovereignty, and Ecosystem Growth
The structural advantages of open-source AI are translating into real economic value. With no licensing fees, these models reduce total cost of ownership (TCO), boost productivity, and support national tech sovereignty. Organizations using open models benefit from lower integration costs, better security control, and reduced vendor lock-in—making them especially appealing for both enterprises and public institutions.

Open-source AI also helps countries build autonomy by reducing reliance on foreign technologies and enabling control over training data and model use. This strengthens cyber resilience and lays the groundwork for sector-specific AI solutions that enhance national competitiveness in the digital economy.

At the same time, open-source is accelerating new industries and collaborative innovation. Services in text generation, code automation, voice recognition, and video creation are emerging rapidly, often powered by models like Llama 2, Mistral, and Falcon. Developers are increasingly open-sourcing their models to gain leadership and community trust—fueling a more cooperative, innovation-driven AI ecosystem.

[Case Study 4]

Llama's Capabilities for the Public Sector



As part of its open-source AI strategy for public sector innovation in Asia-Pacific, Deloitte has showcased internal tools built using Meta's Llama models. Llama allows easy customization to meet government needs and supports secure, on-premise deployment using public data—while maintaining flexibility to integrate other LLMs.

Drawing on examples from Korea, Singapore, New Zealand, and other APAC countries, Deloitte highlights Llama's core public sector value: customizable architecture, data control via local deployment, cost efficiency, scalable collaboration, and enhanced security and compliance.

(3) Labor Market Shifts

Open-source AI is influencing the labor market not just as a replacement tool but as a force that complements and extends existing roles. By automating repetitive tasks, it enables the redeployment of talent to creative and strategic work. Demand for professionals who can effectively use AI tools is rising quickly, often with noticeable wage premiums.

The need for developers, data engineers, and community leaders who can customize, fine-tune, and distribute open models is also growing. This trend is driving both the emergence of new job types and the redefinition of existing roles, signaling a broader restructuring of the labor market.

3. How Countries Are Responding: Global Policy Approaches

Major countries are now shaping open-source AI policies suited to their own national needs. As shown in Table 2, approaches vary, but most share common goals: strengthening tech sovereignty, advancing public interest, promoting innovation, attracting talent, and improving digital access.

The U.S. focuses on private-sector-led governance and infrastructure support, viewing open-source AI as a public asset rather than a regulatory target. The EU takes a risk-based approach—seeking a balance between autonomy and safety—while relaxing certain rules for open models. China positions open-source AI as a tool for self-reliance and global competitiveness, promoting both innovation and trust. The U.K. is piloting open-source models in public administration and national security, linking private-sector expertise with government needs.

Despite differences in strategy, all aim to capture the value of open-source AI through policy frameworks aligned with their national priorities.

<Table 2. Comparative Overview of Open-Source AI Policy Approaches in Major Countries[3]>

Country	Lead Actors	Policy Orientation	Key Features and Examples
United States	Private + Public (e.g., Mozilla, OSI, DARPA)	– No binding regulation – Focus on voluntary norms and infra support	– DARPA-led challenge for public-sector use – Results released under open license – Push for open access to GPUs and data
European Union (EU)	EU Commission, Member States + Research Institutes	– Risk-based regulation under AI Act – Balance autonomy and safety	– Open GPT-X project (multilingual LLM) – Full-cycle public support for infra and data
China	Central Government	– Strategic use of open-source for self-reliance and global reach	– Boosts open-source to enhance trust and innovation – Focus on domestic models (e.g., DeepSeek)
United Kingdom	Government + Private (e.g., Alan Turing Institute)	– Pilots for public sector – Public-private collaboration	– 'Open-Source AI Fellowship' (2025) – Tools for public admin and security use

4. Korea's Policy Gaps: What's Missing?

While open-source AI is gaining traction globally, Korea still lacks the institutional groundwork to support its development and use. Legal, infrastructural, and public procurement systems remain underdeveloped, creating critical gaps that hinder policy progress.

(1) Legal Ambiguity: Unclear Definitions, Liability, and Licensing

Korea has yet to provide a clear legal definition of open-source AI. The Framework Act on the Promotion of AI, scheduled to take effect in 2026, establis-

3. Compiled overview of major policy announcements and related media coverage by country

es broad principles for AI safety and accountability but leaves unresolved how open-source models will be classified. This uncertainty risks inconsistent application of the law, particularly for compliance tools like risk assessments that may be designed with proprietary models in mind.

Liability is another unresolved area. No clear standards exist to determine responsibility when an open-source model causes harm—whether through copyright infringement, misinformation, or other risks. Developers, redistributors, and end users, especially smaller entities, are left exposed to legal uncertainty without knowing where accountability lies.

Licensing further complicates adoption. Open-source AI projects rely on diverse licenses, ranging from permissive frameworks (e.g., Apache 2.0, MIT) to restrictive terms that limit commercial use. In the absence of official guidance, companies face confusion over how to apply these licenses in practice, which slows broader uptake.

Finally, ongoing amendments to the Personal Information Protection Act (PIPA) aim to establish a legal foundation for using lawfully collected personal data in AI training. This effort should complement existing legal grounds—such as “legitimate interests,” “contractual necessity,” and “exceptions to purpose limitation”—rather than narrowing them. Overly restrictive interpretations could stifle innovation. The Personal Information Protection Commission’s reference to “reasonably related” use should be applied flexibly, reflecting real-world contexts where AI is increasingly embedded in digital services. Data use that is foreseeable and transparently communicated to users does not undermine trust—it reinforces innovation grounded in public confidence.

(2) Infrastructure Shortfalls: Compute Power and Usable Data

Open-source AI offers broad accessibility, as models are publicly available. But meaningful experimentation and development still require high-performance computing and large-scale training data. In Korea, limited public support for GPU infrastructure has made it difficult for startups and research institutions to fully leverage open-source AI.

High-quality public datasets suitable for open-source AI remain scarce. While platforms like the Public Data Portal and AI Hub offer various datasets, few meet the standards of quality, interoperability, and labeling needed for effective AI training. This is a particular concern for open-source AI, where transparency and reusability are key—yet many evaluations note that current public data still falls short.[4]

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4. IT DAILY, “Open Public Data: Quantitative Growth Overshadowing Qualitative Gaps,” July 11, 2024. (Accessed July 12, 2025), http://www.itdaily.kr/news/articleView.html?idxno=234196

Government R&D efforts in Korea have largely focused on large-scale AI models and sector-specific applications, leaving open-source AI development and ecosystem building outside the policy spotlight. Unlike the U.S., where DARPA runs open-source AI programs, or the EU's public-led Open GPT-X project,[5] Korea has yet to prioritize open-source models in its national AI strategy. To support long-term growth, public-sector leadership in R&D and community-based infrastructure is essential.

(3) Barriers in Public Sector Adoption and Procurement

Open-source AI is rapidly expanding in the private sector, especially among startups and SMEs, thanks to lower costs and flexible reuse. Naver's vision-language model, "HyperCLOVA X Seed-Vision-Instruct-3B," surpassed 400,000 downloads on Hugging Face within a month of release[6]—demonstrating that Korean models can also compete globally and fuel downstream innovation.

In contrast, adoption in the public sector has lagged significantly. Much of this stems from structural barriers, including rigid procurement systems and outdated certification standards. Key evaluation frameworks—like cybersecurity certifications, SaaS procurement, and cloud assessments—are designed for commercial solutions, with no clear pathway for open-source or self-developed models. As a result, agencies often avoid adoption even when the technology is needed, reinforcing dependence on commercial products and widening the gap between private innovation and public digital transformation.

5. Policy Blueprint: Principles and Strategic Actions

The rise of open-source AI presents a pivotal opportunity to accelerate innovation, level the playing field across industries, and reinforce technological sovereignty. Yet it also brings challenges in ensuring safety and accountability. Building a trustworthy open-source AI ecosystem therefore requires balancing four core principles: fostering fair competition, supporting innovation, safeguarding sovereignty, and enhancing safety.

Korea's data utilization strategy must move in tandem with open access to GPU infrastructure and expanded public R&D investment. Developing new national AI models should complement—rather than compete with—efforts to maximize existing data assets. Given Korea's active adoption of global AI tools, a balanced strategy is essential: one that strengthens and customizes domestic innovation models while also advancing world-class large language model development. Such an approach would not only support the creation of Korean language- and culture-specific models to reduce bias and discrimination, but also position Korea to

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5 DARPA to announce AI Cyber Challenge winners, bring new experience to DEF CON 33
Multilingual and open source: OpenGPT-X research project releases large language model

6. While the model is publicly available, it is not classified as a fully open-source model under permissive licenses such as Apache 2.0 or MIT, as its license restricts commercial use.

deliver globally competitive AI products.

Four Policy Principles

1) Promoting Fair Competition : Open-source AI helps counterbalance the dominance of a few large tech companies by lowering entry barriers for smaller players. It creates space for startups, SMEs, and underserved communities—including those in developing regions and non-English-speaking areas—to participate in AI development. However, openness must be accompanied by transparency and quality assurance to ensure it's not exploited.

2) Supporting Innovation : Open-source enables rapid prototyping, community-driven collaboration, and flexible model customization—accelerating the pace of innovation. Public policy should support these dynamics by fostering stronger synergy with the private ecosystem.

3) Securing Technological Sovereignty : From a sovereignty standpoint, open-source AI helps reduce dependency on specific companies or countries, laying the groundwork for autonomous technological ecosystems. For mid-tier tech economies like Korea, open models offer a strategic pathway to build independent AI capabilities.

4) Ensuring Safety and Trust : Trust and safety are prerequisites for widespread adoption. This requires increasing model transparency and reproducibility, alongside safeguards such as licensing frameworks, validation protocols, and public guidelines to prevent misuse. These four principles form the foundation for the following five strategic actions to scale open-source AI adoption.

Five Strategic Actions

1) Expand Public R&D Investment : Channel government funding into open-source model development—especially large-scale, multilingual, multimodal,[7] and lightweight models—to grow public-domain technologies and reduce private-sector R&D risk.

2) Build a Unified Public–Private Platform : Create an integrated platform where developers, companies, and researchers can access datasets, training code, and model documentation—fostering an interoperable and community-driven AI ecosystem.

3) Open National GPU Infrastructure : Ensure open access to high-performance computing resources by providing public GPU infrastructure and cloud-based environments that support model training and validation at scale.

7. According to Global Market Insights, the global multimodal AI market was valued at USD 1.6 billion in 2024 and is projected to grow at a CAGR of 32.7% from 2025 to 2034.

4) Establish Responsible Licensing Standards : Existing open-source licenses (e.g., Apache 2.0, MIT) do not fully address AI-specific risks like misuse or copyright issues.[8] Develop AI-specific licenses that include provisions for responsible use and restrictions on harmful applications.

5) Pilot Public Use Cases : Deploy open-source AI in public services—such as education, healthcare, disaster response, and climate action—to validate real-world utility, build trust, and catalyze broader adoption across sectors.

Together, these strategies go beyond technical support. They reflect a strategic policy approach to foster a “trust-based” open-source AI ecosystem—where public responsibility and private autonomy are aligned by design.

6. Final Takeaway: Korea’s Window of Opportunity

Open-source AI is more than just a technical option—it’s a strategic tool to cut costs, drive innovation, improve access, and strengthen technological independence. By opening up participation, it helps diversify the AI ecosystem, lowers barriers for startups and SMEs, and reduces reliance on foreign technologies.

However, Korea’s current legal frameworks and public infrastructure are not yet equipped to support this shift. While the government is ramping up its national AI agenda, dedicated policies for open-source AI remain limited. Gaps persist in infrastructure, open data access, licensing systems, and long-term R&D support.

Moving forward, Korea needs a dedicated strategy to support open-source AI. This includes building shared infrastructure, opening up public GPUs, and investing in long-term public R&D. At the same time, policies must protect safety and accountability—without stifling private-sector creativity and autonomy.

The National Assembly should also take action: defining legal terms, setting responsibility standards, securing stable budgets, and supporting pilot programs. Incentives could encourage proprietary model developers to adopt more open, collaborative approaches over time. If Korea can close these policy gaps and foster a reliable open-source AI ecosystem, it will be better positioned to lead both in technological autonomy and global AI competitiveness. In particular, establishing an institutional foundation for data utilization is directly linked to the expansion of the open-source AI ecosystem. When reasonable legal grounds are provided to ensure the safe use of corporate data for AI training, Korea can simultaneously achieve both the spread of open-source AI and its AI G3 strategy.

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8 The Open Source Legacy and AI’s Licensing Challenge, The LINUX Foundation

The Global Evidence Based Policy Institute, affiliated with CODIT, is a private research organization that helps businesses navigate today's complex policy landscape. With expertise in legislation, administration, diplomacy, and trade, the institute publishes issue papers on key topics—including AI, ESG, healthcare, and the circular economy—and hosts policy roundtables to connect public and private sectors. For inquiries or to request a session related to this paper, please contact contact@thecodit.com or visit thecodit.com

Authors' Contact Information

Ji Eun Chung CEO
CODIT
contact@thecodit.com

Haeyoung Song Executive Director
Global Evidence Based Policy Institute
haeyoung@thecodit.com

Seohyeong Jeon Researcher
Global Evidence Based Policy Institute
stella@thecodit.com

Chaeyoung Yoon Researcher
Global Evidence Based Policy Institute
victoria@thecodit.com

Seungmin Park Researcher
Global Evidence Based Policy Institute
madison@thecodit.com

Hansu Park Researcher
Global Evidence Based Policy Institute
hansu@thecodit.com

DENTONS LEE

South Korea

2050: The Path to Net Zero

Governmental Policy, Legal Framework and Recent Developments

National Policy and Transition towards Carbon Neutrality

As part of his legacy, former President Jae-In Moon declared on October 28, 2020 the commitment by South Korea to achieve carbon neutrality status by 2050. Since the public pledge, the nation has made significant efforts and refined its climate governance requirements. In 2021, South Korea revised its Nationally Determined Contribution ("NDC") to commit to a 40% reduction in greenhouse gas emissions by 2030 using base levels in 2018. In 2018, the country recorded 727.6 $MtCO_2e$ that year and in accordance with the NDC commitments the country will work towards a reduction in greenhouse gas emissions to 436.6 $MtCO_2e$.

In April 2023, the South Korean government introduced the "First Basic Plan for Carbon Neutrality and Green Growth (2023–2042)" to further strengthen the commitment and implementation the carbon neutrality policy marking the first point in time in modern South Korea to roll-out a comprehensive roadmap for neutrality and sustainability (the "First Basic Plan"). The First Basic Plan covers the following key industries including energy; built environment/property; transportation; agriculture, livestock and fisheries; and waste management.

Policy and Legal Framework

Korea–Emissions Trading Scheme

The policy for carbon neutrality is based on the Act on the Allocation and Trading of Greenhouse Gas Emissions Allowances enacted in 2012 and the Carbon Neutrality Framework Act of 2021 which together provides the authority to operate a nationwide emissions trading scheme. The foregoing embodies what is referred to as the Korea-Emissions Trading Scheme ("K-ETS").

In 2024 and currently, the K-ETS covers 816 of the largest entities as emitters across energy, industrial manufacturing, commercial and residential buildings, waste management, transportation and logistics, domestic aviation and maritime. The inclusion thresholds remain at ≥125,000 tCO_2e/year at the corporate level or ≥25,000 tCO_2e/year at the facilities level.

As part of the energy framework, South Korea also uses standard units of Korean Allowance Units ("KAU"), Korea Credit Units ("KCU"), Korea Offset Credit ("KOC") as well as international variants for ("iKCU" and "iKOC") – all of which exist for purposes of accountability, monitoring, trading, eligible offsets for carbon credits in the K-ETS (Korean compliance market).

South Korea operates an MRV system under the K-ETS. Covered entities must monitor and measure annual GHG emissions in accordance with Ministry of Environment (MOE) guidelines, have their emissions statements verified by an accredited third-party verifier, and submit the verified statement electronically via the National GHG Management System (NGMS) to the Minister of Environment no later than March 31 of the following year. The MOE then reviews and certifies the submitted amounts (through the Emissions Certification Committee).

In addition, the Greenhouse Gas Inventory and Research Center (GIR) develops MRV guidelines, manages Korea's national GHG inventory, and operates the NGMS that houses emissions, verification and allocation data for the K-ETS.

The domestic market continues to develop with the support of banking, but there remains limited borrowing, a developing use of offsets within quantitative limits, and auctions with at least 10% participation from eligible subsectors. Nevertheless, shares are expected to rise along with an increase in financial intermediaries participating in the exchange.

Liquidity and banking rules have been eased (i.e., the carryovers relaxed; longer conversion periods for offsets, etc.) while auction volumes have adjusted dynamically based on bidding results during 2024– 2025.

Fourth Basic Plan for the ETS (2026–2035) adopted (Dec 2024): significant auction share increases in high-emitting sectors, expanded benchmarking, market-stabilization mechanism, broader third-party participation, and Carbon Contracts for Difference.

Recent 2025 market reforms (implemented): On February 7, 2025, amendments to the K-ETS Act (Law No. 20229) and Enforcement Decree (Presidential Decree No. 35245) took effect, alongside aligned MOE Notices revising the K-ETS Trading Notice, establishing the broker-dealer regime for allowance intermediaries, and updating Exchange Supervision rules. These measures expand eligible market participants (e.g., compliance entities, market makers, broker-dealers, collective investment business entities, trustees, banks/insurers) and formalize consignment trading.

Consignment trading launch: Government guidance states 2H-2025 (with press guidance indicating November).

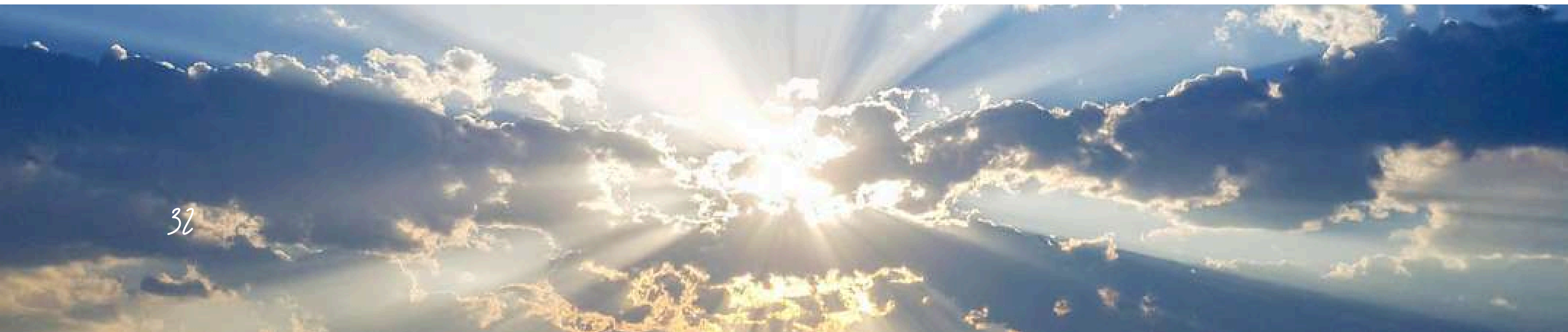
Banking (carry-over) limit: From June 2025, the carry-over cap is eased from 3× to 5× net sales; for KAU24, the carry-over application window runs July– August 2025.

Auctions: The MOE revised the 2025 annual auction plan on July 3, 2025 (MOE Notice 2025-456); monthly auction notices and results are posted by MOE and the KRX ETS portal (e.g., Aug-2025 auction result; last trading day for 2024-vintages on Aug 26, 2025).

MRV guidance: The MOE pre-noticed amendments on Jan 17, 2025 (MOE Notice 2025-31); a subsequent April 11, 2025 ministerial notice took effect on related provisions.

Financial Services Industry:
Climate Risk Management Guidelines (2024)

Significant efforts have been made to ensure that financial institutions such as banks, securities firms, asset management companies and insurers are committed to the overall carbon neutrality efforts in South Korea with oversight by the Financial Services Commission ("FSC") with the Financial Supervisory Service ("FSS") as its supervisory arm, and the Bank of Korea ("BOK"). Over the course of 2024–2025, the foregoing financial authorities advanced climate-risk supervision through joint climate stress-testing pilots administered by the FSS and the BOK where 14–15 financial institutions participated in the financial supervisory outreach.



Risk identification and assessment measures were implemented where financial institutions are now expected to identify and assess physical and transitional risks, including the conducting of stress tests and scenario analysis for quantitative analysis in relation to climate related operations.

The financial authorities have also promulgated certain climate related disclosures for international alignment where climate exposure drafts for the Korean Sustainability Disclosure Standards ("KSDS") were put into effect in May 2024. The disclosure statements are based on those promulgated by the International Sustainability Standards Board ("ISSB") consistent with IFRS S1/S2. Implementation is scheduled to occur in 2027; however, timing remains under review. These efforts build on the pillars under the Task Force on Climate-related Financial Disclosures ("TCFD") – governance, strategy, risk management and metrics/targets.

In relation to governance practices, the frameworks above Climate Risk Management Guidelines and the regulatory oversight over directors and senior officers and executives through the governance pillar and supervisory expectations ensure that the overall management of financial institutions work towards the same goals on climate control and the net-zero policies.

Lastly, the government has engaged in the integration in assessing credit risks with respect to ESG consideration. The stress-testing efforts and emerging disclosure standards push integration of climate risk awareness and programs into core risk models as well as to market ESG analyses reference data such as pursuant to the TCFD/ISSB concepts where degree and pace vary by financial institution.

Green Loan Operational Guidelines

The basis of South Korea's green classification system ("K-Taxonomy") incepted on December 12, 2024 on which date the FSC issued its Administrative Guidelines on Green Finance (the "Green Finance Administrative Guidelines") to apply to K Taxonomy classifications in respect of loans and credits issued by financial institutions (including state policy finance institutions such as KDB, Korea Eximbank, IBK, KODIT and KIBO) and the private corporate sector aiming to curb greenwashing while ensuring transparency and that the market makes good faith efforts and implements actual policies in furtherance of carbon neutrality measures.

As part of the core requirements, K-Taxonomy defines green use of proceeds, sets internal controls (e.g., a “Green Credit Officer”), conduct conformity assessments against K Taxonomy classifications and standards, and supports public disclosures and issuance of certificates. The financial authorities have also signaled ongoing updates to K Taxonomy as it continues to evolve over time.

By illustration, the renewable energy, electric vehicle infrastructure, waste to energy systems, etc. are examples that are subject to and should be, consistent with K Taxonomy with the appropriate evidence in accordance with the K-Taxonomy pilot green bond issuance program. Annual impact reporting and the setting of KPIs are encouraged to monitor outcomes.

In order to strengthen such activities, third party review and verification are recommended to confirm credibility and reduce greenwashing risks under the Green Finance Administrative Guidelines.

Net Zero Strategies by Sector

Agriculture, Waste Management and Energy

South Korea adopted the 2030 Methane Emissions Reduction Roadmap (the “Methane Emissions Roadmap”), which sets a national target to reduce methane emissions by 30% by 2030 from 2020 levels—i.e., from 27.4 $MtCO_2e$ (2020) to 19.1 $MtCO_2e$ (2030)—with sectoral targets across waste, agriculture/livestock, and energy.

In particular with respect to livestock, the Methane Emissions Roadmap focuses on and has identified key quantitative levels for bio gasification and nutrient recycling of manure with tighter management to prevent untreated discharge of animal waste.

Food waste landfill bans and other measures have been implemented since 2005 including the requirement to separate the collection and recycling of food waste, landfill gas (methane) recovery, and improved treatment of sludge/leachate. In addition, key efforts have been made to phase out ocean dumping of sewage sludge since 2016. All such efforts are central to cutting waste sector methane.

In accordance with the Methane Emissions Roadmap, the government foresees an expansion in leak detection and repair (“LDAR”) systems and implementing cuts in fugitive emissions in gas systems.

Energy and Manufacturing

According to the 10th Basic Plan for Electricity Supply and Demand, South Korea plans to reduce coal-fired generation to ~19.7% and increase renewable energy sources to ~21.6% by 2030 (which includes nuclear energy ~32.4%; LNG ~22–23%; and hydrogen/ammonia ~2.1%). The 11th Basic Plan for Electricity Supply and Demand (completed February 21, 2025) adjusts long-term capacity trajectories to 2038 but does not reverse the 2030 shares.

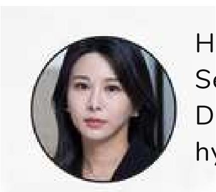
The steel, petrochemical and cement industries are subject to the deployment of low-carbon technologies, electrification, and carbon capture, utilization and storage efforts ("CCUS") in hard-to-abate processes; clean hydrogen introduction (e.g., Clean Hydrogen Power Bidding Market/Clean Hydrogen Power Systems launched 2024) and circular materials are now assigned as key pillars to carbon neutrality.

Commercial and Residential Buildings; Land Use

Commercial and residential buildings are now required to comply with the Zero Energy Buildings (ZEB): Mandatory ZEB requirements as they are being phased in to the regulatory framework with public buildings at ≥1,000 m² since 2020 (with heightened thresholds thereafter); increased thresholds from 2025, and additional standards to be applied from June 30, 2025 (e.g., ZEB Grade 5 requirements and revised performance/specification options). It is noted that large private developments are now also brought into scope on a phased basis.

Smart Green City initiatives have been rolled out with the aim to integrate climate-smart planning and expand urban carbon sinks. The Creation and Management of Urban Forest Act (2020) provides the legal basis for urban forests and related governance for the promotion through plants, forestry, etc. Urban and regional planning alignment under the Framework Act on Carbon Neutrality and Green Growth, the National Framework Plan for Carbon Neutrality and Green Growth (2023–2042 are based on a 20-year horizon, (updated every five (5) years) functions as the upper-level plan for the planning scheme. Provincial and city governors must formulate and implement a 10-year plan every five years, taking into account and aligning with the National Framework Plan and regional policies.

Talk to us



Hailey Hye-In Jin
Senior Attorney
D +82 2 2262 6227
hyein.jin@dentons.com

John JungKyum Kim Senior Foreign Attorney D +82 2 2262 6400
john.jk.kim@dentons.com

NOV
05

GLOBAL ALTERNATIVE INVESTMENT INSIGHTS (GAII) 2025

Date | November 05 (Wednesday)
Time | 09:00-20:00
Venue | Crystal Ballroom(2F) Lotte Hotel Seoul

NOV
20

ECCK CHRISTMAS DINNER

Date | November 20 (Thursday)
Time | 19:00-21:30
Venue | Nuri Ballroom (6F), Four Seasons Hotel Seoul

DEC
11

ECCK BUSAN CHRISTMAS DINNER

Date | December 11 (Thursday)
Time | 19:00-21:30
Venue | Orchid Ballroom (2F), Westin Josun Busan

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Magzine in eBook type placed on the ECCK website.

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ILOUNGE

Branded content placement in the ECCK visitor lounge, i-Lounge.

KRW 1,500,000 | 1 year | 140x140cm | AI or JPG or PNG

- *Limited to a maximum of 5 advertisers per year*

MEETINGS & EVENTS

ECCK DELEGATION TRIP TO EUROPE 2025: FROM GENEVA TO LONDON

The European Chamber of Commerce in Korea (ECCK) conducted a series of meetings across Europe to present its 2025 White Paper, which outlines 70 policy recommendations from European industries operating in Korea.

Starting in Geneva on October 23 with the European Free Trade Association (EFTA), the ECCK continued with meetings in Brussels on October 27 with EUROCHAMBRES leadership and Digital Europe, followed by a discussion with former EU Ambassador Maria Castillo Fernandez, now EU Special Envoy for the Indo-Pacific, on October 28 to exchange views on EU-Korea and regional developments. The handover tour then proceeded to Paris for a meeting with OECD representatives Volker Ziemann and Jon Pareliussen, and concluded in London with the UK Department for Business and Trade (DBT).

Through these engagements, the ECCK reaffirmed its commitment to strengthening cooperation and dialogue between Korea and European institutions, including the EU, EFTA, and the United Kingdom.

EECCK BUSAN YACHT NETWORK NIGHT

Due to the sudden strong wind advisory, the planned ECCK Busan Yacht Network Night, which was scheduled for Monday, October 20, 2025, had to be cancelled. Although the yacht could not depart, around 10 guests still enjoyed a nice dinner together on the yacht docked at the site.

ECCK PRESIDENT DELIVERS WELCOME REMARKS AT THE 15TH ASIA OFFSHORE WIND DAY

On October 20, 2025, Mr. Stefan Ernst, President delivered welcome remarks at the 15th Asia Offshore Wind Day held in Busan. President Ernst emphasized the importance of international cooperation and policy consistency in accelerating Korea's offshore wind developmen and highlighting the shared commitment of Europe and Korea.

ECCK VISIT TO KERING KOREA

On October 17, the ECCK visited Kering Korea, a multinational luxury group encompassing Gucci, Bottega Veneta, Balenciaga, and Boucheron, to discuss expanding cooperation beyond intellectual property rights (IPR). Kering Korea has actively participated in the ECCK IPR Committee since 2017 and attended the ECCK IPR Conference in September 2025.

ECCK HOSTED AN INSPIRING GALLERY TOUR ACROSS SEOUL'S LEADING ART SPACES

The ECCK held a gallery tour on October 16 in collaboration with DHR Global, offering participants a guided exploration of some of Seoul's leading art galleries. Many attendees shared that the experience served as a refreshing cultural escape and a valuable occasion to exchange ideas on shared interests.

ECCK TAX FORUM ON KOREAN TAX UPDATE ON CORPORATE TAXES, CUSTOMS & TRANSFER PRICING

On the morning of Oct 15, the ECCK successfully hosted the Tax Forum. The session was led by Changho Jo, Jung Mo Kang and Young-Joo Kim from PwC Korea, providing guidance regarding the new tax reform proposals which will take effect from Jan 1, 2026 after approval.

ECCK SUCCESSFULLY HOSTED THE SECOND CEO FORUM OF 2025 WITH H.E. UGO ASTUTO, AMBASSADOR OF THE EUROPEAN UNION TO THE REPUBLIC OF KOREA

The European Chamber of Commerce in Korea (ECCK) successfully held its second CEO Forum of 2025 on Tuesday, October 14, at Mariposa (29F), Fairmont Ambassador Seoul. The exclusive luncheon gathered around ten CEOs and representatives from ECCK member companies, providing an intimate setting for in-depth dialogue among top executives.

ECCK BUSAN HOLDS WOMEN'S LEADERSHIP INFORMATION SESSION

The ECCK Busan Chapter hosted the second edition of the Information Session on Women Leadership on Friday, September 26, 2025, at Drawing Room 1 (33F), Park Hyatt Busan. Around 30 guests attended the event, engaging in meaningful networking and insightful speaker sessions. The panelists shared their personal journeys and leadership perspectives, offering valuable insights into the challenges and opportunities that have shaped their professional and personal growth.

ECCK CFO FORUM ON AI: FROM INTRODUCTION TO REAL-WORLD IMPACT FOR CFOS

On September 24, ECCK CFO Forum was held where participants were able to gain insight under the theme of 'AI: From Introduction to Real-World Impact for CFOs'. Participants were able to gain actionable insights into driving efficiency through AI, and understand why successful adoption demands thoughtful preparation, cross-functional alignment, and robust change management.

ROUNDTABLE WITH FOREIGN CHAMBERS OF COMMERCE IN KOREA

On September 24, ECCK Vice Chairperson Moon Goyoung attended the Roundtable with Foreign Chambers of Commerce in Korea which was presided by MOTIE Minister Kim Jung-kwan.

AEROSPACE & DEFENCE COMMITTEE HOSTS SPECIAL SESSION ON DUAL-USE TECHNOLOGIES

On September 23, the European Chamber of Commerce in Korea (ECCK) Aerospace & Defence Committee held a Special Information Session on dual-use technologies and the emerging defence-tech landscape, co-hosted by Join Capital and Intralink. The ECCK emphasized its role as a platform to strengthen partnerships and foster open dialogue in the evolving defence-tech ecosystem.

ECCK'S AUTUMN NETWORK NIGHT MARKS A SUCCESSFUL GATHERING

On September 16, the ECCK hosted its Autumn Network Night at Studio 1 & 2 of Conrad Seoul, bringing together around 120 participants for an evening of meaningful networking. The night was filled with joy and energy, thanks to the enthusiastic participation of our guests and the generous support of our event partners: Seoul Metropolitan Government, AB InBev, Copenhagen Infrastructure Partners, Conrad Seoul, IT-Concept, LEGO, L'Oréal, National Theater of Korea, Pernod Ricard Korea, and Synnøve.

Although the event was moved indoors due to heavy rainfall, we were delighted to see so many of you join us. We would also like to express our sincere gratitude to the team at Conrad Seoul for their swift response in relocating the venue and for ensuring that the event ran smoothly despite the weather conditions.

We look forward to welcoming you again at our upcoming ECCK networking events and information sessions, and greatly appreciate your continued interest and support.

FUTURE DEVELOPMENT FORUM WITH BOEHRINGER INGELHEIM KOREA

The ECCK successfully held its Future Development Forum (FDF) on 18 September 2025 at the Boehringer Ingelheim Korea office, welcoming a full house of 20 young professionals from ECCK member companies. Stay tuned as the ECCK continues to connect and inspire the next generation of business leaders through the Future Development Forum series.

IPR CAPACITY BUILDING SEMINARS HELD IN SEOUL & BUSAN

From 10 to 11 September, the ECCK held its annual IPR Capacity Building Seminars in Seoul and Busan. Bringing together representatives from diverse sectors, the seminars provided a valuable platform for exchanging insights on IPR enforcement between industry professionals, government officials, the Korea Customs Service, local district offices, and the Special Judicial Police of the Korean Intellectual Property Office.

ECCK PARTICIPATES IN THE “TWO-CHILDREN CAMPAIGN” BY POPULATION FOCUS

The ECCK has joined the “Two-Children Campaign” organised by Population Focus, the only media outlet in Korea dedicated to population issues. The campaign is a photo relay project designed to raise public awareness of Korea’s declining birth rate and to inspire positive discussions on population growth. After completing the first round with the general public, the second round — the “Two-Children Campaign” — now invites business and community leaders to participate.

ECCK SUCCESSFULLY CONCLUDES IPR CONFERENCE ON AI AND IP PROTECTION

The European Chamber of Commerce in Korea (ECCK), together with the European Union Intellectual Property Office (EUIPO) and the Korean Intellectual Property Office (KIPO), successfully hosted the 13th Intellectual Property Rights (IPR) Conference under the theme "IP Strategies in the Age of Artificial Intelligence" on 9 September. Organised under the EU-RoK IP Action — funded by the European Union and implemented by the EUIPO — the conference brought together over 120 participants from the business, legal, and policy sectors, including members of the Korean Intellectual Property Association (KINPA) and the Korean Patent Attorneys Association (KPAA), and featured distinguished speakers from EUIPO, KIPO, Kim & Chang, CJ CheilJedang, KAI IP Law, Alibaba, and FAIKERZ.

The conference opened with welcoming remarks by Mr Walter van Hattum, Minister Counsellor and Head of Trade Section at the Delegation of the European Union to the Republic of Korea. He underscored the importance of ensuring that the rapid commercialisation of AI continues to respect ethical values, stressing that technological progress must not lead to social exclusion. Referring to the EU-Korea Digital Partnership Agreement (DPA) and cooperation under Horizon Europe, he highlighted the importance of bilateral efforts to ensure that technological advancements and societal values move forward in harmony.

In his congratulatory address, Dr. Wan-Ki Kim, Commissioner of the Korean Intellectual Property Office, noted that the adoption of AI has significantly improved operational efficiency within KIPO and is being extended to the broader field of intellectual property protection. He emphasised that KIPO is taking proactive measures against IP crimes in the digital environment, while also cooperating internationally to address new issues such as examination standards for AI-generated inventions.

The main sessions of the conference focused on the use of AI in the public sector, the impact of new technologies on IP protection and enforcement, and the ways in which digitalisation may reshape the fundamentals of IP protection and infringement. Speakers shared insights on AI-related policies and enforcement experiences from both the EU and Korea, the role of AI in brand protection and anti-counterfeiting, and the increasing risks posed by online counterfeits. Mr Chang-Kyo Lee, Deputy Director of the IP Information System Division at KIPO, also delivered a thematic presentation.

A high-level panel discussion, moderated by Mr Rahul Bhartiya, AI Coordinator at EUIPO, further deepened the debate with contributions from Ms Hélène Juramy, Counsellor at the Trade and Economic Section of the EU Delegation; Mr Tae-Hwan Won, Deputy Director of the IP Protection Policy Division at KIPO; Ms Maria Hajiyerou, Foreign Attorney at Kim & Chang; Mr Hojoong Kim, Head of the Trademark Division at CJ CheilJedang; Mr Byung-Joon Bok, Patent & Trademark Attorney at KAI IP Law; Ms Miji Park, Head of Global IP Enforcement at Alibaba; and Mr Jaekyu Lee, CSO of FAIKERZ. Participants reached a consensus on the importance of strengthening international cooperation and adopting innovative approaches to address the emerging challenges at the intersection of AI and intellectual property.

ECCK BREAKFAST MEETING WITH FOREIGN INVESTMENT OMBUDSMAN KIM DOO-SIK

On September 11, the ECCK held the Breakfast Meeting with Foreign Investment Ombudsman Kim Doo-Sik. Ombudsman Kim is an expert in international arbitration and international trade law. He had represented the government in numerous trade negotiations and dispute resolutions between countries and received the Industrial Service Medal in recognition of his contributions to trade remedies.

ECCK MEETING WITH L'ORÉAL KOREA'S NEW CEO RODRIGO PIZARRO

On September 10, the ECCK delegation had the pleasure of visiting L'Oréal Korea's headquarters located on the 31st floor of ASEM Tower, which offers a stunning view of the city. The meeting was arranged to greet Mr. Rodrigo Pizarro, the newly appointed CEO of L'Oréal Korea.

ECCK VISIT TO DULWICH COLLEGE SEOUL

On September 8, ECCK visited Dulwich College Seoul in Banpo. It was a fruitful opportunity to exchange views on the ECCK's priorities and plans for the year, and to explore ways to partner in achieving mutually beneficial goals. ECCK also encouraged participation in ECCK initiatives, such as the Women in Leadership program and various seminars, and even discussed possibilities for serving as panelists. The conversation was both meaningful and inspiring.

ECCK HR & COMPLIANCE FORUM SUCCESSFULLY HOLDS SESSION ON LABOUR UNION ACT AMENDMENTS

On September 2, the ECCK HR & Compliance Forum successfully hosted a session on the recent amendments to Articles 2 and 3 of the Labour Union Act, which are scheduled to take effect next year. The session was led by Forum Chair Anthony Chang (Attorney-at-Law) together with distinguished legal experts from Shin & Kim.

ECCK CHAIRPERSON JOINS GRA & RE100 APAC STRATEGY ROUNDTABLE

On August 27, 2025, ECCK Chairperson Philippe van Hoof participated in the GRA & RE100 APAC Strategy Roundtable held at BEXCO, Busan. Organized as part of the CREF 'APAC RE-Sourcing Forum,' the closed-door session gathered key industry and NGO leaders to discuss strategies to accelerate renewable energy deployment in Korea and the wider APAC region. The roundtable focused on procurement challenges, supply chain issues, policy clarity, and regional cooperation to support Korea's renewable energy transition.

ECCK ENERGY & ENVIRONMENT COMMITTEE CHAIR REPRESENTS AT THE 2025 SEOUL CONFERENCE ON CARBON NEUTRALITY AND GREEN GROWTH

On Friday, August 22, 2025, the European Chamber of Commerce in Korea (ECCK) Energy & Environment Committee participated in the 2025 Seoul Conference on Global Cooperation for Carbon Neutrality and Green Growth, organized by the Presidential Commission on Carbon Neutrality and Green Growth in collaboration with the Ministry of Foreign Affairs and the Ministry of Environment.

ECCK HEALTHCARE COMMITTEE ROUNDTABLE MEETING WITH MOHW PHARMACEUTICAL BENEFIT DIVISION

On August 22, 2025, the ECCK Healthcare Committee invited Ms. Yeon-Sook Kim, a director of Ministry of Health and Welfare(MoHW) Pharmaceutical Benefit Division and her team for the roundtable meeting.

The Pharmaceutical Benefit Division is a key department for Drug Pricing Policies in Korea. MoHW shared their plans and ECCK committee members discussed the recommendations suggested for regulatory improvements.

COURTESY VISIT TO MINISTRY OF FOREIGN AFFAIRS DEPUTY MINISTER FOR ECONOMIC AFFAIRS KIM HEE-SANG

On August 22, ECCK Chairperson Philippe van Hoof, President Stefan Ernst, and Vice President Bo Sun Kim paid a courtesy visit to Ministry of Foreign Affairs(MOFA) Deputy Minister for Economic Affairs Kim Hee-sang. Both sides agreed to collaborate on various issues including economic security, etc. in the future.

COURTESY VISIT TO KOREA ENTERPRISES FEDERATION (KEF) CHAIRMAN SOHN KYUNG SHIK

On August 18, ECCK Chairperson Philippe van Hoof, President Stefan Ernst, and Vice President Bo Sun Kim paid a courtesy visit to Korea Enterprises Federation (KEF) Chairman Sohn Kyung Shik. ECCK and KEF exchanged candid opinions on common agenda such as criminalization of CEOs when administrative punishment is possible, the Trade Union Act (so called Yello Envelop Bill)'s amendment, and the issues with the proposed expansion of the exit tax in the Tax Reform Plan.

ECCK MEETS WITH MINISTER OF EMPLOYMENT AND LABOR TO DISCUSS TRADE UNION ACT AMENDMENT

On the morning of August 14, the European Chamber of Commerce in Korea (ECCK) held a closed-door meeting with Minister of Employment and Labor Kim Young-hoon, Labour Policy Director General Kim Yu-jin, and other senior officials to discuss the upcoming amendment to the Trade Union Act.

ECCK Chairperson Philippe van Hoof emphasised the importance of removing uncertainty regarding the definition of “employer” to foster stronger and more constructive cooperation between Korea and Europe. In response, Minister Kim explained that the purpose of the amendment to the law is to encourage labour-management relations to develop into a framework of participation and cooperation. He noted that, should the amendment be passed, the ministry will hold six months of in-depth discussions with major chambers of commerce, economic organisations, and legal and industry experts to establish concrete and practical guidelines, and expressed his hope for the ECCK’s active participation in this process.

The ECCK will continue to maintain open and constructive dialogue with the Ministry to support a transparent and predictable business environment for all stakeholders.

ECCK HOSTS ROUNDTABLE ON DEMOGRAPHIC CHALLENGES: LOW BIRTH RATE POLICIES IN EAST ASIA

On August 11, the European Chamber of Commerce in Korea (ECCK) hosted a closed-door roundtable on the theme of "Low Birth Rate Policies in East Asia" at the Sheraton Grand Hotel Incheon. The event was held with the support of the Presidential Committee on Ageing Society and Population Policy.

This roundtable was organized as part of the ECCK's Family Friendly Future Forum (FFFF) initiative and in alignment with the 2025 APEC Summit. The aim was to discuss policy responses to the low birth rate and demographic challenges in East Asian countries, and to strengthen cooperation between the public and private sectors. The FFFF, launched in November 2024, seeks to foster sustainable and inclusive solutions by engaging diverse stakeholders in dialogue on family-friendly policy frameworks amid Korea's low birth rate and ageing population.

The event opened with opening remarks from Christoph Hamann, Co-Chair of the Family-Friendly Future Forum (FFFF) and General Manager of Merck Healthcare Korea, who underscored that this discussion marks a concrete starting point for strengthening public-private partnerships. In a subsequent video address, Vice Chair Hyung-hwan Joo of the Presidential Committee on Ageing Society and Population Policy emphasised that reversing the population decline caused by low birth rates and ageing requires both policy change and cultural transformation. He particularly highlighted the Government's policy direction for restoring the birth rate and the need for public-private cooperation to achieve it.

The keynote address, titled “Demographic Crisis in East Asia - National Policy Responses and Public-Private Collaboration,” was delivered by Chiu-Chun Lin, Acting Director General of the Gender Equality Department under the Executive Yuan of Taiwan. She shared Taiwan’s key policy measures to address low birth rates and the outcomes achieved.

The panel discussion was moderated by Chair Professor Kyungseon Kim of Korea Polytechnic University (former Vice Minister of Gender Equality and Family) and included the following panels:
| Jae-min Jung, Deputy Director, Division of Population Policy Coordination Office for Population and Social, Ministry of Health and Welfare, Republic of Korea

| Prof. Jung-ryeol Lee, Chair of International Collaboration Committee, Korean Society for Reproductive Medicine

| Myung-hee Kim, President, Korean Federation of Sub-Fertility Family

| Yongrea Cho, PhD in Economics from Keio University & Former Secretary General, Korea-Japan Parliamentarian’s Union

| BoonHuey Ee, Former Co-chair of European Chamber of Commerce in Taiwan (ECCT) Family Friendly Alliance & Vice President, Merck Healthcare

| Bryan Luro, ECCK FFFF Co-chair & Country Manager, Adecco Korea

The panel focused on comparative policy approaches in Korea, Japan, and Taiwan, and discussed the achievements and challenges of domestic policies. Bryan Luro, Country Manager of Adecco Korea and Co-Chair of FFFF, introduced findings from a recent ECCK workplace survey on family-friendly systems. He noted that despite high rates of formal policy adoption—such as flexible working arrangements and parental leave—the actual usage rates remain relatively low. He emphasised the need for cultural change in corporate practices, as well as government incentives and clear policy guidelines to bridge this gap.

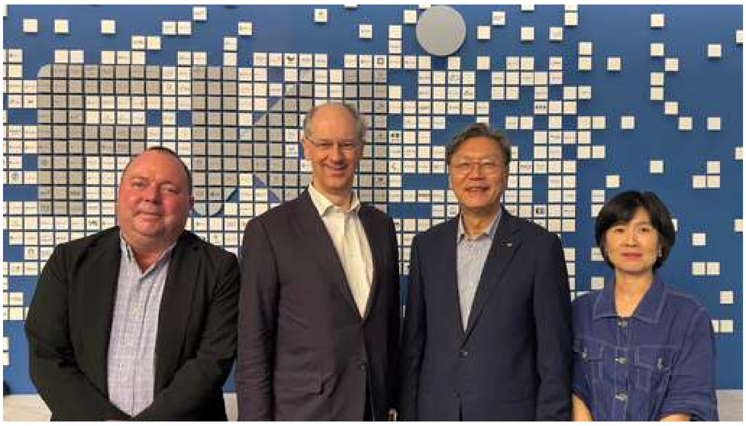
The discussion also referenced examples from Taiwan, where oocyte cryopreservation support programmes are being expanded in major cities such as Taipei, and from Japan, where since 2015 continuous family planning education — including pregnancy and childbirth — has been provided from adolescence, alongside a five-year pre-conception care plan. Building on these domestic and international cases, participants suggested that workplaces should adopt working conditions that support work-life balance and gender equality, and that infertility treatment should be approached as part of lifelong healthcare management.

Professor Kim, who chaired the discussion, concluded the session by stressing the need to enhance the continuity and effectiveness of government policies, and by outlining four key strategies for overcoming Korea's demographic challenges through stronger public-private cooperation. She emphasised the importance of establishing a permanent governance structure that enables continuous dialogue and collaboration between the government and the private sector, while also fostering regional alignment with neighbouring East Asian countries. She further underscored the need to guarantee reproductive health and education by adopting a lifecycle-based approach to family planning. In addition, she called for enhanced institutional support and a shift in corporate culture to better enable work-life balance. Finally, she advocated for the development of a data-driven, tailored care system encompassing infertility treatment, childbirth, and parenting. She remarked that the grave crisis of national decline cannot be solved by government efforts alone. "Only with the creativity and execution of the private sector, and the participation of citizens, can we build sustainable solutions," she said.

In his closing remarks, Stefan Ernst, ECCK President, stated, "Today's discussion marked a meaningful step in our journey toward a sustainable future where work-life balance and intergenerational harmony can thrive. Through the Family Friendly Future Forum, we will continue to support companies in building inclusive and sustainable workplaces, and we hope these efforts will lead to practical responses to demographic change."

The ECCK remains committed to supporting inclusive and worker-friendly corporate cultures as a sustainable response to demographic change through initiatives like the FFFF. In this spirit, ECCK also participated in the 2025 APEC Healthy Women, Healthy Economy Research Prize Dinner held later in the evening, further reaffirming its support for policies that enhance workforce inclusion and well-being.

ECCK PAID A COURTESY VISIT TO FEDERATION OF KOREAN INDUSTRIES(FKI) EXECUTIVE VICE CHAIRMAN KIM CHANG BEOM



On August 13, ECCK Chairperson Philippe van Hoof, President Stefan Ernst, and Vice President Bo Sun Kim paid a courtesy visit to Federation of Korean Industries (FKI) Executive Vice Chairman Kim Chang Beom. ECCK explained that concerns on criminal punishment of CEOs when administrative punishment is possible would be delivered to the Korean Government through ECCK White Paper 2025. Also Chairperson Philippe shared his concern on the issues with the proposed expansion of the exit tax in the 2025 Tax Reform Plan.

ECCK ATTENDS 2025 APEC HEALTHY WOMEN, HEALTHY ECONOMIES RESEARCH PRIZE RECEPTION

On 11 August, the ECCK attended the 2025 APEC Healthy Women, Healthy Economies (HWHE) Research Prize Reception, held at the Sheraton Grand Incheon Hotel.

CELEBRATING SWISS NATIONAL DAY: ECCK STRENGTHENS TIES WITH SKBC

On August 1, the Swiss-Korean Business Council (SKBC) held its annual Swiss National Day celebration at La Suisse Restaurant, bringing together over 60 guests from the Swiss business community and friends of Switzerland in Korea. ECCK President Stefan Ernst was among the distinguished guests in attendance, highlighting the continued spirit of collaboration among European business communities in Korea.

NEW

2025
ECCK PREMIUM MEMBER
Emerald

SIEMENS Healthineers

Siemens Healthineers is a global leader in medical technology, committed to pioneering healthcare breakthroughs that enable providers to deliver high-quality, accessible, and affordable patient care worldwide.

Siemens Healthineers operates in over 70 countries and employs more than 70,000 individuals, making it one of the largest healthcare technology companies globally. The organization was officially branded "Healthineers" in 2016 after a long history of innovation rooted in Siemens AG, with its headquarters based in Erlangen, Germany. It was originally part of Siemens AG and became independent in 2017, with Siemens AG still holding a majority stake.

Key Areas of Expertise
The core portfolio includes: Medical imaging (CT, MR, ultrasound, X-ray, etc.), Laboratory diagnostics, Molecular diagnostics, Therapeutic and precision medicine solutions, Managed services, healthcare IT, and consulting

Siemens Healthineers pioneered critical medical advances such as industrial X-ray tubes, real-time ultrasound, and early cardiac pacemakers.

WELCOME TO ECCK!
PLEASE FIND THE LIST OF NEW MEMBERS WHO JOINED ECCK IN THE LAST QUARTER

Insight Communications Consultants

Insight Communications Consultants is a boutique PR agency providing strategic communications services for multinational clients in Korea and Korean clients abroad. Led by former international journalists and seasoned PR experts, Insight offers media relations, reputation and crisis management, public policy advocacy, investor relations, and CSR program support. The firm also specializes in press events, speech and content development, media monitoring, and large-scale event planning.

JOIN. CAPITAL

JOIN Capital is an early-stage venture capital firm based in Berlin, London, and Milan, investing in deep tech across enterprise, industrial, and defense sectors. Since 2017, it has supported founders developing technologies that shape and secure future industries. Managing over €150 million from investors including CDP, Isomer Capital, NIF, and KfW Capital, JOIN Capital has backed 31 companies and achieved five successful exits.

연세힐치과의원
HEAL DENTAL CLINIC

A registered institution for attracting foreign patients, Yonsei Heal offers patient-centred dental care with over 11 years of experience. Located just 20 minutes from Gimpo Airport, the clinic provides easy access and English-friendly service led by experienced medical professionals.

professional passion, loyal dedication

DAEWON LOGIPIA KOREA

BULK · PROJECT · CONTAINER · ATA CARNET · AIR · EXHIBITION
www.daewonls.com | kskim@daewonls.com

Established in 2008 as an international freight forwarder having its global logistics service with ocean-freight, air-freight, heavy-lift, vessel chartering, aircraft chartering and etc. All our professional colleagues have been devoted in this business field between 15 to 40 years which is the pride of Daewon Logipia. Additionally, we have both exclusive and non-exclusive partners across the globe for handling inbound and outbound shipments.

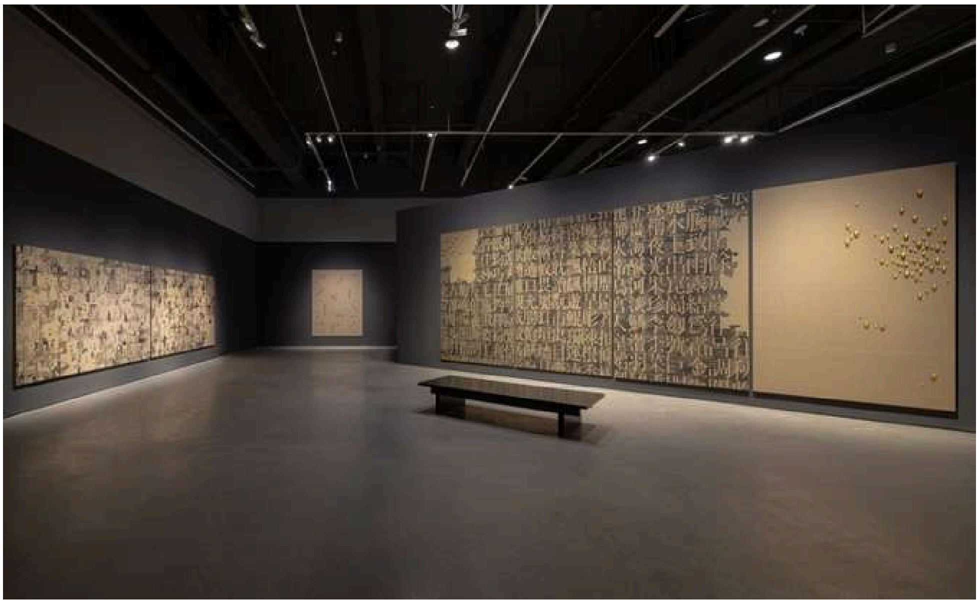
Lumcloon Energy Korea

Founded in 2008, Lumcloon Energy develops flexible power and energy assets to support the global transition from fossil fuels to renewables. With extensive project experience in Ireland and beyond, the company focuses on designing and delivering solutions that ensure a secure and sustainable electricity supply.

KIM TSCHANG-YEOL

22 AUGUST - 21 DECEMBER 2025

The National Museum of Modern and Contemporary Art (MMCA) presents a landmark retrospective of Kim Tschang-yeul (1929-2021), one of Korea's most celebrated modern artists, best known for his mesmerizing water drop paintings.



Panning the artist's seven-decade career, the exhibition traces Kim's evolution from his early post-war experiments in art informel to his signature meditative water drop motif that brought him international acclaim. Divided into four thematic sections—"Scar," "Phenomenon," "Waterdrops," and "Recurrence"—the show offers a rare opportunity to witness the artist's creative journey from Korea to New York and Paris, where he developed a unique synthesis of Western abstraction and Eastern philosophy.

Highlights include previously unseen works from his New York years, early illustrations from his time as a police officer, and the monumental Recurrence SNM93001 (1991), displayed for the first time. The exhibition also features an archival section that brings visitors closer to Kim's personal world—his Paris studio, his correspondence, and the poetic spirit that defined his art.

Curated with French designer Adrien Gardère, the exhibition offers an immersive look into how Kim's lifelong fascination with the fluidity and purity of water became both an artistic language and a profound meditation on life itself.

KIM'S WATER DROPS ARE NOT MERELY DEPICTIONS OF NATURE—THEY ARE REFLECTIONS OF EXISTENCE,"

NOTES MMCA DIRECTOR KIM SUNG-HEE.

"THIS EXHIBITION OFFERS A CHANCE TO REDISCOVER ONE OF KOREA'S MOST INFLUENTIAL ARTISTS."

2025
ECCK PREMIUM MEMBER

Diamond

BMW MINI Lufthansa SWISS

Mercedes-Benz Pernod Ricard pwc 삼일회계법인

ABInBev
OB 오비맥주

Emerald

bkl BAE, KIM & LEE BAYER HEINEKEN KIM & CHANG

Lee & Ko 법무법인 광장 SARTORIUS SIEMENS Healthineers

Ruby

AGS FOUR WINDS INTERNATIONAL MOVERS AstraZeneca IKEA JTI

L'ORÉAL KOREA PHILIPS RWE 삼정 KPMG

SAP YOON & YANG 법무법인(유) 화우 Vestas PILZ THE SPIRIT OF SAFETY Securitas

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CONNECT

02-6261-2700

ecck-comm@ecck.or.kr

www.ecck.or.kr