

CENTRAL POLICY UNIT
HONG KONG SPECIAL ADMINISTRATIVE REGION

A LITERATURE REVIEW OF FAMILY POLICY IN
FOUR EAST ASIAN SOCIETIES

THE CHINESE UNIVERSITY OF HONG KONG

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Preface

Background and Objective of the Study

This study was commissioned by the Central Policy Unit (CPU) of the Government of the Hong Kong Special Administrative Region in early 2009. The objective of the study is to provide background information on family policy development in East Asia. This study, through a literature review of family policy change in four East Asian societies (Japan, South Korea, Taiwan and China) attempts to:

1. identify the general trend of family policy development in East Asia
2. understand the policy choices within the context of cultural, economic and political settings in East Asia
3. examine the relationship between family policy and socio-demographic changes in East Asia
4. draw out relevant lessons for family policy discussions in Hong Kong

Methodology

This study is based on an analysis of existing data. Data were collected mainly through library and internet research. Research findings are confirmed by various data sources, including official documents, scholarly research reports, books and journal articles.

Research Team

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Executive Summary

This report discusses the continuities and changes of family policies in four Asian societies—Japan, South Korea, Taiwan and China—from the 1950s to 2000s. The major objective is to understand and explain their policy choices within the context of their cultural, economic and political settings, and then draw out relevant lessons for family policy discussion in Hong Kong.

Definition of Family Policy

Family policy in this report refers to benefits and services that governments provide for families, covering the following four aspects:

1. *Cash support for families*, including family allowances, tax relief for children and means-tested cash benefits
2. *Leave benefits for working parents*, including maternity, paternity, parental and childcare leave schemes
3. *Childcare services*, including the provision of and subsidies for childcare facilities
4. *Elderly care services*, including the provision of and subsidies for elderly care facilities

The Comparative Framework

East Asia has since the 1990s attracted more research attention in the

field of comparative social policy research. Two competing arguments stand out. One is that East Asia is considered a unique case that deserves to be classified as a separate category from the western societies. The other is that East Asia is best viewed as evolving in direction of some western societies. The major empirical concern is the extent to which the four East Asian societies share a common orientation and development in their family policy. The major theoretical concern is the relative importance of two sets of factors in explaining the choice of family policy: 1) the legacy of Confucian values; and 2) the level of economic and political development. The policy implication concerns whether it is more feasible for cross-country policy learning to draw from experiences of societies with a similar cultural legacy, or from those with a similar level of political-economic development.

This study is based on a literature review of family policy development in East Asia. Data were collected mainly through library and internet research. Research findings are confirmed by various data sources, including official documents, scholarly research reports, books and journal articles. This study attempts to:

1. identifying the general trend of family policy development in East Asia
2. understanding the policy choices within the context of cultural, economic and political settings in East Asia
3. examining the relationship between family policy and socio-demographic changes in East Asia

4. drawing out relevant lessons for the family policy discussions in Hong Kong

Family Policy and Family Change in East Asia

In Asian societies, unlike the situation in most Western Societies, both the elderly and children have long relied exclusively on their families to meet their dependency needs. However, this family model is becoming increasingly difficult to sustain, mostly because of a series of demographic changes including fast population ageing, very low fertility rate, and decline in the commitment to marriage and in solidarity in family relations. Because of the weakening of the traditional family model, we can no longer expect women to bear the dual responsibilities of care giving and wage earning at the same time. A common policy development is for the government to take on a more active and substantial role in supporting care services for both the children and the elderly.

Japan

The post-war Japanese welfare system has been based on maintaining a traditional gender division of labour both in the household and in the wider society, that is, men serving as wage earners and women serving as homemakers and caregivers. Because the Japanese state has long shown a reluctance to intervene into family affairs, Japan can be classified as a hybrid between the pro-tradition and the

non-interventionist family policy model. However, this policy model had faced serious challenges since the mid-1970s due to a series of socio-demographic changes, including population ageing, declining fertility rate, delay of marriage, and the rising female labour participation rate.

While Japan was among the first Asian societies to industrialise and democratise, its economic stagnation and the intensifying competition among political parties during the 1990s have compelled the Japanese government to become more responsive to social problems resulted from the demographic changes. As a result, family policy reform initiatives have been picking up pace and extending in scale since the 1990s, with the overall direction being to provide more public support for care services while accommodating female labour market participation.

In retrospect, family policy development in Japan demonstrates how the East Asian welfare model reaches its limit when economic growth stagnates. As the legitimacy of the authoritarian state weakens, the government seeks to shore its support by proposing reform in response to heightened public concerns. During the 2000s, the Japanese family policy model has become more interventionist, even though it continues to have a relatively strong orientation towards the pro-traditional model. First, family has always been the centre of the care provision for both the elderly and the children. Second, women have long assumed the responsibilities of being homemakers and caretakers. Third, even after

the family policy, the government tends to prefer to take up the role as a finance provider over the role as a service provider. This is particularly evident in the elderly care reform in which community-based and home-based care are both prioritised over institutional care.

However, since the Confucian tradition did not really stop the trend of rising female labour force participation, the state has come under increasing pressure to become more pro-active in providing family care service. Not surprisingly, Japan became the first East Asian country in which the state has taken on a more active role in intervening into family affairs.

South Korea

The development of South Korea's welfare policy clearly illustrates its status as a developmental state, in that political legitimacy is based on achieving continuous economic development, and social policy programmes are designed as a way to enhance the political legitimacy. However, since the transition to political democracy in the late 1980s, the Korean welfare state system has become more inclusive and steadily expanded its welfare provision institutions. Nevertheless, the most significant welfare reform agenda was not launched until the 1997 financial crisis hit Korean economy hard, followed by Kim Dae-Jung's election as the president.

Entering the 21st century, South Korea has become more actively

involved in family affairs. One illustration is the restructuring of government ministries in 2008 that involved the establishment of the Ministry for Health, Welfare and Family Affairs. Currently, two of the most pressing public concerns are a fast-ageing population and a very low fertility rate. With the new ministry, Korean family policy has transformed from a non-interventionist to a more pro-active orientation, with a new policy direction being to work towards a better work-family balance through private-public partnerships for childcare and elderly care.

Family policy reform in South Korea in the 21st century can be understood as responses to the deterioration of the traditional patriarchal social order. An increasing number of women are no longer willing or able to bear the disproportionate burden of balancing work and care giving. The continuous low fertility rates clearly illustrates that the old family policy model can no longer work effectively.

The developmental state strategy underpins the family policy reform. Of particular significance is a long-term social investment strategy that aims to integrate social and economic development by creating a virtuous circle of positive returns flowing between economic growth and social welfare development. The government intends for the new family policy, which commodifies the previously un-commodified care work, to achieve two inter-related objectives: 1) freeing women from informal care work to enable their more active participation into the labour market; and 2) spurring economic growth by socialising care

provision for children and elderly.

Taiwan

Taiwan's socio-economic development trajectory shares a lot of similarities with that of Korea and, to a lesser extent, Japan. During the post-war decades until the 1990s, Taiwan could be classified as having a developmental welfare model that lacked a coherent and comprehensive family policy. As in the case of other East Asian developmental states, social policy in Taiwan was subordinated to economic development policy. The Confucian family model is supposed to ensure that all the family members are taken care of, while voluntary organisations are encouraged to assist the more disadvantaged social groups.

From the 1990s onwards, much of the social policy reform was made amid the intensification of party competition in electoral politics. Nonetheless, a major breakthrough in family policy did not happen until 2004, when the long-standing opposition political party, now in power, passed a bill on family policy reform. This bill signalled that the government now intends to become more actively involved in family affairs, particularly in financing care services.

The most significant policy reforms include the plan for a long-term care financing system, the promotion of home- and community-based care system, and the promotion of gender equity. Still, it should be

noted that Taiwan family policy continues to show a strong orientation towards the Confucian traditions, as shown by the relatively resilient traditional gender division of labour and the generalised reciprocity between generations.

The development of family policy in Taiwan demonstrates yet another case in which the East Asian developmental model tends to face increasing difficulties in preserving the traditional family model. Maintaining this system becomes increasingly difficult once economic development falters and when the traditional conception of gender roles is challenged by the modern education system and feminist ideas. Even though the traditional conception of the gender division of labour may not be openly challenged in the public policy debates, many women are no longer so willing to conform to the cultural norms, resulting in such trends as more women delaying marriages, having fewer children, and/or living apart from the elder generations.

Although Taiwan may have become somewhat more active in promoting childbirth and female labour force participation by financing care services, its welfare policy in general and family policy in particular still shows a strong continuity along the post-war policy model which prefers the family and the private sector to get things done before the state intervenes. It thus appears that the Taiwan government prefers to make gradual changes to its family policy unless insurmountable problems emerge.

China

It is not surprising to find that the Confucian family model remains strong in China, because it is a latecomer, as compared to Japan, Korea and Taiwan, with respect to economic development and political democratisation. Still, China has followed a similar development trajectory, if we focus on the socio-economic development after the 1978 reform, which is widely recognised as a watershed in China's development.

Whereas pre-reform China was characterised by a series of Communist social policies, post-reform China has moved closer to the East Asian developmental state. In particular, post-reform China has shown a productivist welfare orientation, that is, social policy is subordinated to the economic development strategy. While there has recently been greater public concern over the problem of population ageing, the Chinese government has yet to comprehensively reform its family policy. Recent family policy initiatives are mostly accommodations to economic reform, with the one-child policy, pension reform and community-based care system being three notable examples.

As in the earlier phase of other East Asian developmental states, the family is still the primary welfare institution in China. Hence, the government's involvement in both childcare and elderly care is limited. There is also a strong preference for preserving the traditional family, as demonstrated by the state's inclination to support the community to

share the care giving load with the family. From the experience of the other East Asian cases, the developmental state tends not to reform its welfare institutions until economic growth hits a bottleneck and social protests are in full swing.

In a way China now resembles what Japan experienced in the 1970s, and Korea and Taiwan in the 1980s, when family policy orientation tended to be less interventionist, care provision residual, and policy reform incremental. At this stage, not only are the Confucian families still assumed to be responsible for their own welfare needs, they also fit into China's overall state building strategy. In sum, major family policy reforms in China have yet to occur, though there are signs that the Chinese government is more inclined towards adopting the pro-traditional model.

Factors Affecting the Change of the East Asian Family Policy

From the experience of family policy development in East Asia, we conclude that:

1. The level of economic development is largely responsible for the direction of the change in family policy. A higher level of economic development is associated with increasing public support for the family.
2. The level of political development is largely responsible for the scale of the family policy change. A higher level of political development is associated with more extensive change in public

support for the family.

3. The strength of Confucian values is largely responsible for the continuous preference for pro-tradition, family-centred policy measures.

Family policies in East Asia tend to be non-interventionist as long as the Confucian family model is functioning effectively as a stabilising institution for the society. When the Confucian family model is challenged by socio-economic changes, East Asian governments tend to take a pro-traditional approach in their family policy reform. Put simply, changes in Asian family policies have generally gone through three stages:

1. The Confucian family model remains relatively strong: the four cases are commonly classified as developmental states, as political legitimacy is mostly maintained by the government's ability to create decent jobs and promote rapid economic growth. During their industrialisation phase, welfare provision institution was underdeveloped, and the Confucian family model constituted the primary welfare institution by taking care of non-working family members. The strength of the Confucian family model is a major reason why the East Asian states have not felt the pressure to formulating a comprehensive family policy.
2. The Confucian family is increasingly challenged by economic change: Both the East Asian developmental state and the Confucian

family model have come under growing pressure to change because of a series of socio-demographic challenges. Put simply, as a result of economic restructuring towards a post-industrial economy, highly-educated women are in great demand to fill service jobs. This weakens the foundation of the Confucian family model because women are less willing and/or able to shoulder the double burden of being wage earners and care givers. Emerging is a series of undesirable family outcomes, including fast population ageing, a very low fertility rate, and a low marriage rate.

3. The Developmental welfare model under intensifying political pressure: As it is increasingly difficult for the Confucian family to be the primary welfare providing institution, the developmental state tends to face intensifying political pressure to reform social policy. The social movements and political opposition tend to emerge and spread as disadvantaged groups learn how to fight for their own interests through collective action. This is a pattern that we find in the East Asian developmental model, particularly when economic growth slows down. Welfare reform in general and family policy reform usually come after an economic slowdown and/or political struggle.

Directions of the East Asian Family Policy Development

The East Asian family policy model is a mix between the non-interventionist and the pro-tradition model. Changes in the

political economy are driving the East Asian family policy to move away from the non-interventionist approach, whereas the Confucian cultural legacy is pulling policy reform towards the pro-traditional model:

1. Shifting away from non-interventionism: family policy in East Asia tends to remain closer to the non-interventionist model as long as the Confucian family model is stable, economic growth is robust and political legitimacy is high. However, these three conditions are not easy to sustain. In East Asia, family policy is actually moving away from non-interventionism, though the scale and scope of intervention vary a lot among these four societies.
2. Moving towards a pro-traditional approach: the influence of the Confucian values is significant in explaining the new family policy orientation in line with the pro-traditional approach. More often than not, the state still refrains from providing universal family benefits and long leave arrangement for parents, but rather selectively support families to perform their functions. Notable examples included expansion of childcare services and long-term home-based elderly care system.

East Asian Family Policy into the 21st Century

Entering the 21st century, the East Asian family policy model is developing into a mixture between the non-interventionist and

pro-traditional approach. There are three major characteristics in this East Asian Model:

1. A work-centred Welfare Approach: the East Asian family policy model is still based on the idea that individuals should support their own families by paid work. Accordingly, parental leave arrangement is not very generous, and almost all cash allowance programmes are means tested. New initiatives focus on the expansion of public support for both childcare and elderly care, as the overall approach is to support wage earners to balance between work and family obligations.
2. A public-private co-financing model: influenced by non-interventionism, East Asian states refrain from fully financing or directly providing care services for the family. Not only are most of the cash allowance schemes means-tested, the East Asian governments also are more inclined to draw upon private resources in financing the new initiatives.
3. A comprehensive social care system: there is an inclination towards using community organisations and social networks in supporting home-based care. Because of the pro-traditional orientation that family is the ideal place for care giving, East Asian family policy declines to establish a comprehensive institutional care system. Instead, new initiatives are designed to support home-based care with a variety of community support services, such as day care

service for the elderly, after-school childcare programme, and community-based part-time helpers.

In sum, we see the convergence of the four societies towards an East Asian family policy model, even though the timing, the scale and the pace of policy reform are different due to variations in their socio-economic contexts. The Confucian legacy helps explain the overall policy shift from the non-interventionist towards the pro-traditional model, and the level of economic development is a key factor in affecting the timing of policy change, while the change in the political system is more associated with the scale and pace of policy reform.

Policy Recommendations for Hong Kong

The Hong Kong policy context is closer to the liberal welfare regime than the other four East Asian cases. In Hong Kong, market and family remain two major social institutions, and the state is expected to play a relatively smaller role. Accordingly, Hong Kong is also closer to the non-interventionist family policy model since values such as self-reliance and voluntarism also apply to Hong Kong. Nevertheless, the inclination towards preservation of the traditional family is still strong (especially inter-generational reciprocity), although gender equality is also gaining more support. Therefore, Hong Kong can also be classified as a mixture between the non-interventionist and the pro-traditional family policy model. Because Hong Kong is also under

the same challenges of family change facing most East Asian societies, their policy reforms are relevant for Hong Kong. We propose the following five recommendations for the further development of family policies in Hong Kong:

1. Examine the Stress Level of Various Family Types

In order to enhance the policy effectiveness, the government should further examine how various family forms encounter different difficulties. With a larger number of families not organised according to the two-parent family model, the new family policy should recognise and accommodate different needs of other family forms, including dual-earner, lone-parent, and modified extended families. A major lesson learned from the four East Asian cases is that while the modified extended family is an effective adaptation to rapid industrialisation, this family model tends to weaken when the economy undergoes a further transition towards the post-industrial, service-based model. To avoid demographic changes moving in an undesirable direction, we need to further examine the types of difficulties that various family forms encounter and then formulated policy measures for various target groups.

2. Help Citizens to Achieve Work-Family Balance

Hong Kong should accommodate citizen's needs to achieve a satisfactory work-family balance. With a higher female labour force participation rate, the lack of a work-family balance policy is directly

related to the declining number of childbirths. Though helping women to resolve work-family conflicts may not reverse the trend of delayed marriage and declining fertility rates, it probably will make marriage and childrearing less burdensome for women. Therefore, Hong Kong should consider the general policy direction in other East Asian societies where childcare and elderly care are both being transformed from a solely private responsibility towards a public-private partnership. Prolonging parental leaves, providing childcare subsidies and extending public care services should be the appropriate policy measures to be pursued in Hong Kong.

3. Build a More Comprehensive Caregiving Support System

Hong Kong has already launched a community-based childcare support system. We would suggest that the government also examines the feasibility of building a community-based elderly care system. A common policy reform in other East Asian societies is the establishment of a comprehensive caregiving support system that provide families with a wide range of options and a lot of flexibilities. In addition to institutional care, a variety of community-based home care services are provided depending on the health condition and the need for care of the elderly, such as home help, home-visiting nurses and day-care services. While the cultural ideal of home-based elderly care system is still strong, a comprehensive caregiving support system can make life easier for many families.

4. Taking a Social Investment Approach in Care Service Reform

While care service has long been regarded as a welfare provision, we should not underestimate its potential as a revenue-generating and employment-creation industry. Of particular relevance is the recent reform in South Korea. Under this Social Investment State model, care services are designated as a potential growth engine for the new economy because the expansion of social care services can spur the growth of both private-for-profit enterprises in tandem with non-profit organisations. While the availability of social care services facilitates career advancement for more educated women, the development of social care services as an industry also provides less educated women with some decent employment opportunities. The Chief Executive has in fact already identified medical services as one of the six industries with good economic growth prospects. The development of childcare and elderly care services could be complementary to this economic development strategy.

5. Attempting a Private-Public Partnership for Family Policy

It is more prudent for the government to muster a resource pool through private-public partnerships. One option that Hong Kong might usefully examine is whether it is feasible to learn from the Japanese experience of building a private-public co-financing long-term care insurance system. This will provide financial resource for elderly care reform while alleviating the financial burden of the public healthcare

system. In addition, the government may want to consider putting more effort into persuading private enterprises to adopt family-friendly employment practices. Actually, accommodating work-family balance has been increasingly regarded as a major aspect of corporate social responsibility. Last but not least, a major form of private-public partnership is to make use of community resources to support families. In addition to encouraging existing voluntary organisations to support families, it would be fruitful to promote new social enterprises that provide family and childcare services in the neighbourhood.

In conclusion, while the Hong Kong government has been adopting effective policy measures in helping families, we believe that there are also some valuable lessons to be learnt from the four East Asian societies.

摘要

本報告討論東亞社會在戰後六十多年來的家庭政策發展，其中論及日本、南韓、台灣、中國等，旨在探討家庭政策轉變背後之文化、政治、經濟等因素，藉以為香港的家庭政策討論提供相關建議。

家庭政策之定義

本報告的家庭政策專指由政府向家庭所提供的支援及服務，涵蓋以下四個方面：

1. 財政支援—包括現金支援、稅務減免、對低收入家庭援助
2. 假期—女士產假、男士產假、育兒假期
3. 托兒服務—包括提供及資助托兒服務
4. 護老服務—包括提供及資助護老服務

比較架構

東亞地區的比較政策研究自 1990 年代以來愈來愈受學界重視，其中以兩個觀點最為人熟識：其一，東亞社會與西方社會截然不同；其二，東亞社會逐漸向西方社會的模式轉變。

在研究東亞社會的家庭政策時，不少學者也關注到東亞社會與西方社會有多相似，在家庭政策的制訂和改革時，究竟文化因素與政經因素兩者哪項較重要。這個議題對本地政策討論亦相當重要。究竟本地政策應向文化背景相近的地區借鑒，還是向政經發展程度相近的地方取經呢？

本報告以文獻回顧為主，探討日本、南韓、台灣、中國等東亞四地家庭政策的發展。資料來源包括官方文件、學術研究報告、書刊等。本報告之主要貢獻有：

1. 指出東亞家庭政策發展之主要方向
2. 探討政策背後之文化及政經因素
3. 論證家庭政策與人口變化之關係
4. 為本港家庭政策討論歸納出可供借鑒之外地經驗

東亞社會的家庭政策與家庭變遷

東亞社會有別於眾多的西方社會，家庭除了有義務照顧兒童之外，更有責任照顧老人。在現代社會裡，這固有的家庭模式卻不易維持，其中教普遍的社會問題包括人口老化、低生育率、婚姻與家庭關係趨向淡薄等。換句話說，當今女性愈

來愈難兼顧工作和家庭，而各地政府也普遍傾向加強對家庭的支援，特別在托兒及護老服務方面。各東亞社會的家庭政策發展概述如下。

日本

戰後日本社會建基於傳統“男主外女主內”的兩性分工模式，政府較少干預這種傳統的家庭模式。故此，日本的家庭政策介於“不干預型”和“支持傳統型”之間。自1970代之後，這種家庭政策飽受挑戰，其中較受關注的社會問題有人口老化、低生育率、晚婚、女性就業率增加等。自1990年代起，經濟增長放緩以及政黨競爭加劇，日本政府對社會民生議題更加重視，在制訂家庭政策方面變得更較積極，特別是在支援職業女性的措施方面。

日本的家庭政策發展反映了東亞社會發展模式的一大特點：經濟增長放緩令政權認受性下降時，政府較傾向調整既有的家庭政策。進入廿一世紀，日本的家庭政策已頗具積極干預的傾向。可是，日本政府對保留傳統家庭的重視，可見於三方面：其一，家庭依舊是照顧兒童及長者的核心；其二，

女性依舊有扶老攜幼的責任；其三，政府較傾向擔當財政支援的角色面，減少直接提供服務，特別是護老服務方面，以家庭照顧及社區照顧優先於院舍照顧。

由此看來，隨著女性就業率增加，傳統兩性分工愈來愈難以維持。日本政府轉向積極支援家庭服務就反映了這發展趨勢。

南韓

南韓的家庭政策發展反映了“發展型國家”的其中一大特點，即政權認受性建基於經濟增長。因此，社會福利制度建設相對不受重視，直至 1980 年代以後政治民主化加快，南韓的福利制度才逐步建立起來。當中的轉捩點就是在 1997 年亞洲金融風暴後，金大中當選了總統而推行新政。

進入廿一世紀，南韓的家庭政策也已經脫離了舊有的“不干預模式”，轉向主動建構一個公私合作系統以加強托兒和護老服務。其中在 2008 年南韓政府架構重組中，就可見政府的家庭政策變得更為積極。家庭事務備受重視，現時兩大議

題分別是人口老化和低生育率。

其實，南韓的家庭政策改變主要是受到固有社會秩序失衡所致。其中最明顯的問題就是女性愈來愈難以平衡工作與家庭，導致生育率持續偏低，人口老化加快。從南韓近年的家庭政策改革可見，其“發展型國家”的施政方針依然不變，以擴大托兒和護老服務的市場規範為主要發展方案，一方面為低學歷女性增加就業機會，一方面為本土經濟催生一項刺激內需的產業，將社會服務看成為“社會投資”，可算是新世紀的新思維。

台灣

台灣的社經發展模式與南韓和日本頗相似，戰後的幾十年間，經濟發展政策一直都優先於社會福利政策，也沒有一套完整的家庭政策。長期以來，台灣社會都依賴儒家傳統家庭以照顧弱勢社群，並由志願團體提供協助。1990年代以後，政黨競爭加劇，社會福利制度成為政黨爭論的其中一項重要議題。不過，真正的家庭政策轉捩點是2004年所提出的家庭政策方案。

在台灣家庭政策改革中，最重要的措施包括建立長期護老系統，建立以家庭和社區為本位的家庭服務模式，以及加強兩性平等機會等三方面。由此可見，台灣的家庭政策逐漸變得積極主動，不單鼓勵生育及支援女性就業，更加大在托兒和護老服務的財政支出。不過，台灣政府依舊保留了一直以來的方針，就是先讓市場和家庭把問題解決，再由政府介入。

台灣家庭政策的轉向也明示了保留傳統家庭之困難所在。由於女性普遍教育程度提高和就業機會增多，傳統的兩性分工愈來愈難維持。雖然女性未必會公然挑戰傳統，卻大多不願依從傳統的女性角色，這可見於較多女性晚婚、減少生育、較多與上一代分開居住等社會趨勢。

中國

在中國，儒家傳統的家庭模式仍然保持著主流地位，這大概與中國社會還未全面現代化有關。中國在 1978 年改革開放後的經濟發展歷程，和其前述的東亞“發展型國家”類近，都是以經濟發展政策優先於社會福利政策。

雖然近年來不少專家對人口老化問題表示關注，但是中國政府仍然未有積極規劃一套完整的家庭政策。有關家庭事務的政策基本上都以經濟發展為大前題，例如一孩政策、退休保障改革、社區服務系統。政府在托兒和護老方面的支援不多，家庭依然是主要的福利提供者。政府頗著意於保留傳統家庭制度，故較傾向支援社區組織以協助家庭育兒和養老。

中國的經驗也反映了東亞社會的一個共通點，即社會福利制度的建設，往往都是在經濟發展遇上瓶頸以及大規模的群眾示威出現之後。現今的中國，其政經狀況都近於 1970 年代的日本與 1980 年代的南韓和台灣，家庭政策也是以不干預為主。現階段的中國，儒家傳統家庭有助於社會穩定，也有助於整體的國家發展策略。家庭既行之有效，家庭政策未有大幅改革也是順理成章。

總結東亞四地家庭政策發展的經驗

由上述東亞社會的經驗，可歸納出以下幾個重點：

1. 經濟發展水平是影響家庭和人口變化的重要因素

2. 政治民主化是影響政府家庭政策改革速度的重要因素
3. 儒家文化價值是影響家庭政策方針的重要因素

總的來說，東亞社會家庭政策的改革都在儒家傳統家庭模式無力維持，並在經濟發展遇上瓶頸之後。以下是東亞社會家庭政策發展模式的三個主要階段：

1. 以儒家傳統家庭為社會支柱：東亞發展型國家的發展初期，政權認受性建基於政府能否推動經濟和創造就業。在工業化的初期，社會福利制度還未建立，弱勢社群所靠的就是家庭的支持。儒家傳統家庭為社會提供一張安全網，令政府無迫切需要去規劃一套完整的家庭政策。
2. 經濟發展對儒家傳統的挑戰：現代化對儒家傳統和威權政府都構成威脅，尤其是在後工業化後向服務型經濟轉型，高學歷女性的事業發展機會大增，更難於平衡工作與家庭，衍生了一連串的人口及家庭問題，如人口高速老化、低生育率、低結婚率等。
3. 政府加強社會福利制度建設：由於家庭凝聚力下降，經濟增長的成果未能如過往一樣，透過家庭關係以惠澤不同個人。因此，較多弱勢社群傾向以社會運動爭取利益，

對政府構成壓力，改革福利制度成為了紓解民困的常用措施。

東亞家庭政府發展的方向

東亞家庭政策的主要發展方向是由“不干預型”轉向“保留傳統型”。當儒家傳統家庭模式穩定時，整體社會也相對較穩定，也解釋了政府“不干預型”家庭政策的底因。當政經發展削弱儒家傳統家庭的凝聚力時，政府則較傾向透過政策以保留傳統。東亞家庭政策發展有兩個主要方向：

1. 漸漸脫離“不干預型”：東亞家庭政策一貫的“不干預型”方針建基於傳統家庭穩定，經濟增長及政治氣氛和諧。當這三者皆愈來愈難維持時，東亞社會的家庭政策亦逐漸脫離“不干預型”的方針，政策介入家庭的深度與廣度亦有所增加。
2. 轉向以“保留傳統型”：儒家文化的影響見諸於在東亞家庭政策對保留傳統家庭關係的重視。在政策轉向的同時，政府依然不願提出全民現金福利，也較少提供長年期的產假和育兒假期，而較傾向支援家庭繼續負起扶老

攜幼的責任，其中擴大托兒服務和長期安老服務系統就是常見措施。

廿一世紀的東亞家庭政策

進入廿一世紀，東亞家庭政策由“不干預”轉向“保留傳統”型，形成兩個家庭政策類型之混合體，以下是廿一世紀的東亞家庭政策的三項特徵：

1. 以就業為基礎的福利模式：東亞社會依舊信守個人努力工作以養家的生活態度。除了家長所享有的法定有薪假期相對較短，多數的財政支援計劃都規定入息上限。家庭政策措施以方便平衡家庭和工作為主，其中最普遍之措施為擴大育兒和安老服務。
2. 公私分擔的財政模式：東亞社會受“不干預”的社會政策影響頗深，政府較少直接對家庭提供資助，較傾向透過市場經營者提供服務。除了多數財政支援計劃都設有入息上限外，新推出的家庭服務措施也傾向要求個人支付部份費用。
3. 全面的社會家庭服務系統：東亞社會傾向以社區組織和人際關係去支援家庭照顧兒童及老人，這與“保留傳

統”的政策方向一脈相承。因為家庭傳統上有責任照顧兒童及老人，新近推出的措施不少都以實現這種文化價值為出發點，逐漸建構出一個全面的家庭服務系統，因應不同需要的家庭提供有彈性的服務，如日間護老、課餘托兒、社區兼職家務助理等。

總的來說，東亞社會的政策傾向，與儒家文化中的家庭價值和工作倫理是互相滲透的。至於政策改革的時機，與經濟發展的水平有較大的關連，而政策改革的步伐和幅度，就與政治民主化的程度有較大關連。

政策建議

香港一直奉行的“積極不干預”的管治原則，香港政府較少介入市場運作和家庭關係。換句話說，香港較諸其他東亞社會，更近於“不干預”的家庭政策模式，尤其重視自力更生和自由選擇的價值。香港人對傳統家庭價值也十分重視，特別是兩代互助和兩性和諧的關係。可是，香港也面對著一連串與東亞社會相似的人口和家庭問題，如出生率持續下降，

人口老化，晚婚，不婚等。相對之下，日韓兩地的家庭政策改革特別值得香港借鑒。本報告歸納東亞社會的家庭政策發展經驗並提出五項政策建議如下：

1) 深入研究不同家庭形態的需要

在制定有效的家庭政策前，先要深入研究不同形態的家庭有何迫切需要。“男主外女主內”的家庭模式愈來愈難維持，家庭形態已變得多元化，如“改良式擴大家庭”“單親家庭”、“雙職家庭”等。從東亞四地的經驗可見，傳統家庭在工業化的挑戰下轉型至“改良式擴大家庭”，以保留傳統上“扶老攜幼”的家庭職能。當經濟轉型至以服務業為主時，女性勞動力的需求大大增加，“改良式擴大家庭”的模式也難以維持。因此，政府宜深入研究不同家庭所面對的各種問題，以制定相應的措施。

2) 協助市民平衡工作和家庭

女性就業率提高，令“平衡工作和家庭”成為了各地家庭政策的重點。協助在職女性平衡工作和家庭未必能扭轉晚婚和少生育的趨勢，卻總可減輕職業女性的壓力。政府宜將扶老

攜幼的責任以公私合作的模式，加強對在職人士提供支援。其中可考慮的措施包括為父母提供更長的育兒假期，加強公共托兒服務和提供育兒服務津貼等。

3) 建立全面而具彈性的家庭服務系統

香港近期推出的“社區褓母”計劃頗見成效，可考慮推出類似的社區護老支援計劃。這類家居服務支援系統，可為市民在院舍服務與家人照顧兩者外，提供多項較具彈性的選擇。這類方案也有助保留傳統家庭的互助精神，東亞社會的政策改革也朝這方向發展，如家務助理、日間探訪、日間托兒及護老服務等。

4) 以社會投資的思維推行家庭服務改革

雖然家庭服務一向被視為社會福利，但是家庭服務其實可以透過產業化成為一種創造就業的經濟活動。從南韓的改革經驗中可見這種將家庭服務視為社會投資的新思維，將社會服務產業化，一方面為低學歷女性提供更多就業機會，一方面為高學歷女性提供較全面的家庭服務。行政長官近期就提出將醫療服務發展為香港其中一項優勢產業。其實，這方面的

產業發展模式，也可考慮伸延至托兒和護老等家庭服務。

5) 公私合作的家庭政策方案

相較於由政府單方面出資，公私合作的融資模式更值得考慮。其一，香港可參考日本的經驗，以公私共同融資的模式推行全民護老保險計劃，不僅為護老服務提供新的資源，也可減輕公共醫療系統的壓力；其二，政府可加強商界推廣“家庭友善的僱傭措施”，讓更多企業承擔“平衡工作和家庭”的企業社會責任；其三，政府可鼓勵現有的社區組織和新興的社會企業提供更加多樣化的家庭服務。

總的來說，雖然香港的政經環境跟其他東亞社會不盡相同，但是也可借鑒相關的家庭政策發展經驗的。

Chapter 1

Introduction and Overview: In Search of an East Asian Family Policy Model

1. Introduction

This research project aims to understand and explain the continuities and changes of family policies in four Asian societies—Japan, South Korea, Taiwan and China—from the 1950s to 2000s. The major empirical concern is the extent to which they share a common orientation and development in their family policy. The major theoretical concern is the relative importance of two sets of factors in explaining the choice of family policy: 1) the legacy of Confucian values; and 2) the development of the political economy. The policy implication concerns whether it is more feasible for cross-country policy learning to draw from the experiences of societies with a similar cultural legacy, or from those with a similar level of political-economic development. Our major argument is that the pace and scale of family policy changes are largely explained by the level of political and economic development, whereas the preference among various policy measures is significantly influenced by a country's cultural legacy. This argument is supported by three major findings in our research:

1. The level of economic development (as indicated by the level of industrialisation and post-industrialisation) is largely responsible for the direction of the change in family policy. A higher level of economic development is associated with increasing public support

for the family.

2. The level of political development (as indicated by the level of democratisation and the intensity of political party competition) is largely responsible for the scale of the family policy change. A higher level of political development is associated with more extensive change in public support for the family.
3. The strength of Confucian values is largely responsible for the continuous preference for pro-tradition, family-centred policy measures.

In Asian societies, unlike the situation in most Western Societies, both the elderly and children have long relied almost exclusively on their families to meet their dependency needs. However, this societal division of labour is becoming increasingly difficult to sustain, mostly because of the change in family structure and changing gender roles. Common demographic trends in these societies include:

1. Population ageing – the pace of ageing is picking up especially because of the very low fertility rate and longer life expectancy.
2. Very low fertility rate – the total fertility rate, which is used to represent the number of children that a woman will give birth to during her life, is particularly low compared with OECD countries.
3. Decline in the commitment to marriage and in solidarity in family relations -- delayed marriage, higher divorce rates, and lower co-residence with the elder generations are becoming more common..

Because of the weakening of the traditional family model, we can no longer expect women to bear the dual responsibilities of care giving and wage earning at the same time. A common policy development is for the government to take on a more active and substantial role in supporting care services for both children and the elderly. It is interesting that there is a “flying geese” pattern in family policy formation and change in East Asian countries, with Japan first undertaking a major reform in the early 1990s, followed by South Korea after 1997, and Taiwan during the 2000s. However, China remains an outlier in terms of undertaking major reform in its family policy. Comparatively speaking, Japan took the lead in reforming its family policy as a result of post-industrialisation (which leads to an increasing level of female labour force participation), coupled with globalisation (which leads to stronger pressure for local standards to match up with global standards). By contrast, South Korea and Taiwan show how democratisation and economic restructuring since the mid-1990s can become powerful driving forces behind major policy reforms. From this vantage point, it is understandable that China shows a higher level of continuity in its family policy because of its status as a latecomer to both economic and political development.

East Asian societies face similar challenges posed by common demographic changes that are associated with economic development. These inter-related demographic trends have given rise to growing public concerns and their politicisation has pressured governments to reform their family policies. The more democratic the government is,

the more likely that it will be more responsive to the new needs and expectations. Economic development thus helps to account for the demographic pressures that East Asian societies have been experiencing whereas democratic development helps to explain the willingness of East Asian governments to respond by recalibrating their family policies. However, the Confucian culture plays the significant role by providing the guiding principle underlying various policy reforms, and in shaping societal preferences as well as policy priorities for both the government and the family. All in all, that may explain why East Asian governments are becoming more proactive and interventionist in their family policy, but prefer the role of a finance provider rather than a service provider, prefer home-based and community-based care over an institutional care system, and encourage shared responsibilities between family and state rather than the wholesale socialisation of care responsibilities.

2. Literature Review and the Comparative Framework

A number of attempts have been made in the growing research on family policy to find a definition of family policy that can be applied universally but there is still no consensus on its meaning. Kamerman and Kahn (1978) suggested that family policy can mean “everything that government does to and for the family” (p.3). Zimmerman (1995) noted that “family policy constitutes a collection of separate but interrelated policy choices that aim to address problems that families are perceived as experiencing in society” (p.3). If we adopt one of these

broad definitions, family policy would include policy areas such as housing, social security and health. In order to organise our research around a well-defined policy area, we adopt the definition of family policy in the later work of Kamerman and Kahn (1997): “the term family policy includes laws, regulations, benefits, and programmes (sometimes) deliberately and explicitly designed to achieve specific objectives with or for individuals in their family roles or for the family unit as a whole” (p.3).

While scholars in the Western tradition use the term “family policy” with reference to families with children, we also propose to include those policy initiatives that deal with families with the elderly in order to better fit the Asian context. Indeed, as the traditional family declines as a social institution in Asian societies, following in this respect the trend in the West, a major policy concern in the region is how to enable the family to continue to perform the eldercare function (Salaff 1988; Lockhart 2001; Ikels 2004; Rebick and Takenaka. 2006). The concept of family policy in this research will cover four areas: reproduction policy, employment-related policy, childcare policy and elderly care policy. In concrete terms, family policy in this report refers to benefits and services that governments provide for families, covering the following four major aspects:

1. *Cash support for families*, including family allowances, tax relief for children and means-tested cash benefits
2. *Leave benefits for working parents*, including maternity, paternity, parental and childcare leave schemes

3. *Childcare services*, including the provision of and subsidies for childcare facilities
4. *Elderly care services*, including the provision of and subsidies for elderly care facilities

2.1. Family Policy Models in Western Societies

Social and demographic changes in recent decades have been converging in many developed societies. Among these changes are the postponement of marriage, the increase in relationships outside heterosexual marriage, the declining birth rate, the increasing divorce and remarriage rate, and the increasing number of married women in the labour force. However, different countries have adopted quite different policy measures to accommodate the social and demographic challenges arising from these trends. From the vantage point of path-dependent policy analysis (Pierson 2004), the continuities and changes in family policy can be understood as government responses to new needs emerging from these socio-demographic changes on the basis of a set of well-established, long-lasting guiding principles underlying social policy.

Among numerous comparative studies of family policies, one especially worth noting is Gauthier's (1996) that identified four models of family policy after studying policy development in 22 countries. She categorised countries into four family policy models with reference to the major objective that underpins the family policy:

1. ***Pro-natalist model***, in which the issue of low fertility rate is the major concern. The support of family is seen as a responsibility of the government and takes the form of cash subsidies, maternity leaves and child-care facilities. Working mothers are not disapproved of, and conditions are created such that being in employment is not an obstacle to childbearing. France is the notable example.
2. ***Pro-traditional model***, in which the preservation of family is the major concern. The government partly endorses the responsibility of supporting families and a belief in the role of family, community and charity support still dominates. Despite the provision of employment benefits for mothers, the traditional male-breadwinner model is encouraged and obstacles to women's employment such as taxation still persist. This model of family policy is characteristic of continental countries such as Germany and Austria.
3. ***Pro-egalitarian model***: The main objective of this model is to promote greater gender equality. Governments take full responsibility for creating an environment to help women to combine paid employment and family responsibility more easily, and to allow fathers to play a larger role in child-caring. Legislation on parental leave is one of the centre-pieces of this model. This model is found in Northern European countries such as Denmark and Sweden.

4. *Non-interventionist model*: In this model, only the families in need are taken care of by the government. Believing in the self-sufficiency of families and the functioning of the market, state support of families is kept at a very low level. Working benefits for mothers such as maternity leave are regarded as the responsibility of private companies rather than that of the government. This model is found in Anglo-Saxon countries such as Britain and the United States.

Gauthier's classification is consistent with a number of other comparative family policy studies (e.g. Kaufmann 1997; Daly and Lewis 2000; Abrahamson et al. 2005). Many of these studies adopt the idea of path-dependency in that family policies in different countries are viewed as having developed on the basis on a set of well-established, long-lasting guiding principles. However, a major weakness in Gauthier's typology is that it is more descriptive than explanatory of the national differences in family policy. To add analytical depth to a comparative study of family policy, we need to look for a complementary analytical framework.

2.2. Family Policy and Welfare State Regime Analysis

A widely-cited theoretical framework called the "welfare state regime" analysis can be used to explain why countries have different policy responses to common challenges (Esping-Andersen 1990). Welfare

state regimes refer to “the ways in which welfare production is allocated between state, market and households” (Esping-Anderden 1999: p.73). This term is an organising concept for analysing the social policies of advanced industrialised countries and the government’s roles in managing and organising the economy, employment, and wages as well as providing social protection. The major argument is that each country has developed its social policy on the basis of a guiding principle regarding the appropriate division of labour among the state, market and family. There are three major welfare regimes:

- a. *The liberal welfare regime* relies mainly on the market as the major mechanism in allocating resources; both the state and family are required to adapt to the market mechanism. The state encourages its citizens to participate in the labour market for their livelihood and welfare provisions serve as a safety net of last resort. As such, welfare benefits are restricted to a clientele of low-income, usually working-class, state dependents. The state is also constrained from intervening into the market provision for family services. As a result, this regime stresses market solutions and responses to high rates of female employment, work/family tensions, and other child/women/family issues. Examples of the liberal welfare regime are found in the US, Canada, Australia and the UK. There is a set of inter-related socio-political foundations of the liberal regime: 1) a set of traditional, liberal work-ethic norms, which encourage individualism and hard work; 2) a middle class that prefers the market to the state as the main resource allocation

mechanism, coupled with fragmented, relatively weak labour unions;
3) the dominance of liberalism in the socio-political system, that believes in freedom, equal opportunities, healthy competitiveness on the market, voluntarism and the spirit of entrepreneurialism as the basic conditions for achieving individual emancipation,.

- b. *The conservative welfare regime* displaces the market as the predominant mechanism of resource allocation and relies on the family to play a central role in providing social services to its members. Accordingly, the state strives to maintain the family as a coherent and well-functioning unit. This also explains why this regime is called “conservative”: social policies are so designed as to preserve or even reinforce the conventional male-dominated, occupation-based social hierarchy. On one hand, social benefits are distributed in accordance with existing social status and groupings as acquired in the labour market. On the other hand, welfare policy is designed to preserve the traditional family (i.e. male as bread winner and female as housewife and mother). Hence, private insurance and occupational fringe benefits play a marginal role, while social insurance typically excludes non-working wives, and family services (such as day care) are conspicuously underdeveloped. Instead, this regime stresses the role of the traditional family, minimises female labour force participation, and provides less direct investment in children. Austria, France, Germany and Italy are commonly included in the Conservative Welfare Regime. The set of socio-political

foundations of the conservative regime includes 1) a widespread acceptance of social rights that overrides the liberal obsession with market efficiency; 2) the presence of a well-established Church that is strongly committed to the preservation of the traditional family; and 3) the dominance of traditional conservatism in the socio-political system, with the unifying theme that traditional status relations must be retained for the sake of social integration.

- c. *The social-democratic welfare regime* is built upon a strong state in allocating resources and offering a full-range of social services. Juxtaposed to this welfare regime is a family model that plays a residual role in providing social services. Equal access and full participation in the labour market is viewed as one of the most desirable social goals, as the state takes on the responsibility to emancipate its citizens from the traditional family. Therefore, the state extends its welfare provision to the middle class by promoting equality of the highest standards instead of an equality of minimal needs as is pursued elsewhere. In sum, the social-democratic welfare regime is led by a strong government that emphasises gender equity, child well-being, high rates of female employment and the reconciliation of work and family life, while minimising the roles of the market, and to a lesser extent, the family. Notable examples are Scandinavian countries such as Sweden and Norway. The set of inter-related socio-political foundations of the social democratic regime includes 1) a widespread acceptance of the principles of universalism and recognition of social rights; 2)

powerful, all-encompassing, and centralised trade unions that, usually in liaison with a strong labour party, were willing to engage in central national-level, or industry-wide, negotiations with employers; 3) the dominance of the social democracy in the socio-political system, which promotes an equality of the highest standards.

A closer look at Gauthier's four family policy models shows that her classification scheme overlaps to a large extent with Esping-Andersen's welfare regime typology. Her pro-egalitarian and non-interventionist models correspond to Esping-Andersen's social-democratic and liberal welfare regimes respectively, while her pro-natalist and pro-traditional models correspond to Esping-Andersen's conservative welfare regime. The resemblance is by no means accidental, and even Gauthier (2002) recognised the similarity between the two typologies in her later work. The explanation for this resemblance lies in the historical and institutional contexts in which different types of social policies are constituted. Esping-Andersen (1990) argues that each regime type has distinctive historical roots and is promoted or supported by specific political coalitions, which in turn become a powerful mechanism in shaping how regimes evolve. In face of the challenges posed by universal trends such as population ageing and high divorce rates, each welfare regime will find its family policy objectives being prioritised by the application of the existing principles underlying the welfare regime (Esping-Andersen 1990; 1999). Hence, it is fruitful to understand family policy within the broad framework of welfare regime analysis.

The welfare regime typology not only illuminates why there are different policy objectives in different family policy models, but also highlights the institutional foundation for the relative stability of different policy models. To conclude, the major theoretical argument is that countries with the same type of welfare regime tend to make similar choices with respect to their family policies while countries whose welfare regimes differ make different policy choices.

2.3. In Search of an East Asian Welfare Regime

An important issue is whether East Asia's social policies can be understood by using the welfare regime framework. This research will contribute to this debate by incorporating culture as a key variable in social policy analysis. Theoretically, if the East Asian Welfare Regime is based on Confucianism, this would imply that it stands alone as a distinct type of welfare regime, as contrasted with Esping-Andersen's "Three Worlds of Welfare State Regimes". In terms of practice, it also means that what is applicable in the Western societies will be less relevant to the East Asian context. Alternatively, the configuration of the East Asian Welfare Regime can be explained by the formation and change of the developmental state. This implies that as the political economy evolves, convergence is more likely to happen, and that processes of democratisation and globalisation will be more powerful in reshaping the welfare regime.

East Asia has since the 1990s attracted more research attention in the

field of comparative social policy research (Ku and Jones Finer 2007). A major research topic is whether the East Asia can be fitted into Esping-Andersen's Three Worlds of Welfare Regimes (Lee and Ku, 2007; Hong 2008). Two competing arguments stand out. One is that East Asia is considered a unique case that deserves to be classified as a fourth type of welfare regime. The other is that East Asia is best viewed as having a welfare regime which is evolving in the direction of either the liberal or the conservative regime. The group of scholars who treat East Asia as a unique case often cite Confucianism or the developmental state as the key factor that distinguishes East Asia from the West, coining terms such as "Confucian Welfare Cluster" (Lin 1999), "Productivist Welfare Capitalism" (Holliday 2000) and "The East Asian Welfare Model" (Aspalter 2006). The second group of scholars is influenced by Esping-Andersen's argument that East Asia (as represented by Japan) can either be treated as a Hybrid or an Embryo (Esping-Andersen 1997). Their common argument is that East Asia societies are too diverse to be treated as a cluster, instead, their social policies are viewed as mostly affected by their level of political and economic development. As such, political democratisation and economic globalisation are two major forces driving these societies to converge towards either the liberal or the conservative welfare regime.

We focus on the continuity and change of family policy in four East Asian societies, namely, Japan, South Korea, Taiwan and China. While all four societies can be classified as developmental states, their levels of political and economic development are quite different. Of the four

cases, Japan is the closest to the West in terms of the level of development in the economy and polity. In the case of Korea and Taiwan, state-led industrialisation enabled them to catch up with the West throughout the 1970s and the 1980s, whereas political democratisation has only become a major factor since the late 1980s. China has been lagging behind in both economic and political development, experiencing rapid industrialisation only since the 1980s while democratisation has yet to be realised.

From our literature review, we can see that there are two crucial similarities among these countries. First, Confucianism is a factor contributing to the similarity within the East Asian policy regime (Walker and Wong 2005). Second, the nature of the developmental state can be used to understand how these societies pursue similar policy adaptations to some common socio-economic challenges (Wong 2004; Kwon 2005). Our framework is designed with the intention to delineate the inter-relationship among the key variables of cultural orientation, political economy and family policy. In our comparative framework, the different levels of development in these four cases serve as a quasi-experimental setting for us to control the key variables in order to examine whether development in the political economy or cultural tradition is a more significant factor affecting family policy. With the four cases sharing a similar Confucian cultural tradition, we can examine the effects of two major distinctions between them: 1) early industrialisation and late industrialisation; and 2) early democratisation, late democratisation and an authoritative state. If culture is a strong

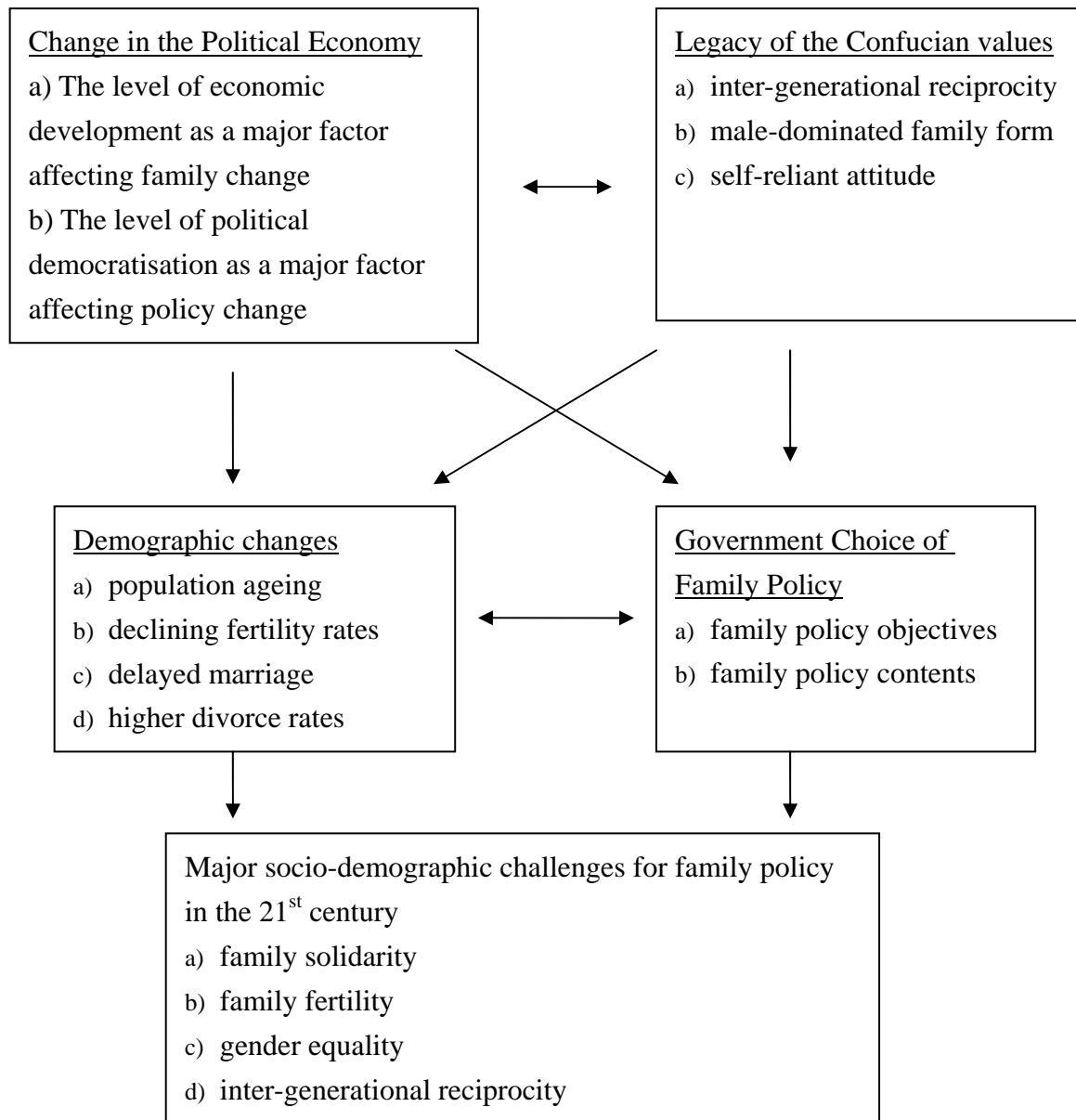
determinant of family policy, we should expect to find that these cases make similar family policy choices in response to common problems such as globalisation and the decline of the traditional family. Alternatively, should their family policy choices diverge, then their differing levels of political-economic development could offer a more plausible explanation.

3. The Comparative Framework

Our comparative framework is designed to analyse the continuity and change in each case from the 1950s to 2000s. Through documentary research of archives and secondary sources, we will examine each country in accordance with the comparative framework that consists of five major elements, namely 1) the formation and change of the political economy; 2) the cultural legacy of Confucianism; 3) demographic changes; 4) the choice of government family policy; and 5) the major demographic challenges in the 21st century.

In the following we will elaborate how we use the comparative framework to first provide an in-depth description of each case in terms of the choice of family policy in response to changes in the wider socio-political contexts. This is followed by an analytical discussion concerning the relative importance of Confucian values and the political economy as factors contributing to the similarities and differences of family policy among the four East Asia societies (Figure 1).

Figure 1: The Comparative Framework for Analysing the Continuity and Change in Family Policy, 1950s-2000s



Source: author's analysis

A. In-depth description of the family policy in response to demographic changes

We will give a detailed account of *the demographic changes* throughout

the period from the 1950s to 2000s. Major attention will be paid to the changing characteristics of family and population including a) fertility rates; b) marriage and divorce rates; c) female labour participation rates; and d) population ageing. Then, we will discuss *the choice of government family policy* during the period in terms of its continuity and change in two dimensions:

- a) Policy objectives, which will be discussed with reference to Gauthier's four family policy models, namely non-interventionist, pro-natalist, pro-egalitarian and pro-traditional. Major attention will be paid to the key objective that underpins the family policy.
- b) Policy contents, which will be discussed with reference to the four areas of family policies, namely, reproduction policy, employment-related policy for working parents, childcare policy and eldercare policy. Major attention will be paid to 1) how the family policy defines the division of labour among the state, market and family in those policy areas; and 2) how the four policy areas work together to achieve the key objective that underpins the family policy.

The descriptive analysis will be concluded by evaluating the extent to which the family policy achieves desirable family outcomes, by referring to *the socio-demographic trends in the 21st century*, including aspects such as a) the level of family solidarity (as indicated by the marriage and divorce rate), b) the level of family fertility (as indicated by the total fertility rate), c) the level of gender equality (as indicated by female labour market participation rate) and d) the inter-generational

reciprocity (as indicated by the level of inter-generational support).

B. Analytical discussion of the relative importance of Confucian values versus the political economy in affecting family policy

The descriptive analysis of family policy is followed by a discussion of the determinants of family policy choice. The focus will be an evaluation of the relative importance of Confucian values and the political economy in explaining the family policy formation. Our analysis of *the formation and change in the political economy* is concerned with the policy preference that political elites have upheld during industrialisation and post-industrialisation, and how it has been affected by the level of democratisation. Our analysis of *the legacy of Confucian values* is concerned with the strength of the Confucian influence on policy discussion in three major aspects: a) intergenerational reciprocity, which refers to Confucian ideas of filial piety linking the elder and the younger generations; b) male-dominated family form, which refers to Confucian ideas of the gender division of labour; and c) self-reliant attitude, which refers to the Confucian ideas regarding work attitudes.

This framework will provide relevant materials for a discussion of the relative importance of culture and political economy in family policy formation and change in East Asia. Particular attention will be paid to analysing how the policy choice/shift is related to the combination of contextual changes. There are two competing hypotheses: 1) there is a strong cultural orientation underpinning the family policy, and thus a

continuous emphasis on Confucian values in family policy; and 2) the formation and change in political economy dominates the choice of family policy, thus causing a more significant deviation away from the Confucian family values towards the Western dual-earner nuclear family model. In particular, the political economy theory would predict that Japan will be less Confucian, as compared with Korea and Taiwan, while China should be the most Confucian among them. By contrast, the cultural theory would predict they will have very a similar family policy that shows more or less the same level of concern for maintaining the traditional family.

4. A Brief Sketch of the Four Cases

Family policy is one area where there are large cultural differences between East Asia and the West. Generally speaking, it is useful to situate the East Asian family regime between the non-interventionist and the pro-tradition model, because of its preference for the family to bear the primary responsibility for the welfare of family members.

Japan: The post-war Japanese welfare system has been based on maintaining a rather rigid gender division of labour both in the household and in the wider society, that is, men as wage earners and women as homemakers and caregivers. However, this policy model had been under serious challenge since the mid-1970s due to a series of socio-demographic changes. Among the most significant demographic challenges are the population ageing, declining fertility rate, delay of

marriage, and the rising female labour force participation rate. As a result, the pace of family policy reform initiatives have picked up and their scale has been expanding since the late 1980s and the early 1990s, with the overall thrust being to provide more public support for care services while accommodating to female labour market participation.

South Korea: The post-war South Korean welfare system has designed around the productivist orientation, that is, social policy has been subordinated to economic policy. This welfare model is based on the assumption that the family will take care of its elder and younger members. This model has worked well as long as the economy maintains healthy growth and the wealth created trickles down to the household level. However, the South Korean welfare policy in general and family policy in particular was deemed unsustainable after the 1997 financial crisis. With the reformist president Kim taking office, South Korea's family policy underwent major restructuring over the past decade. The more radical reforms include the increase of old-age allowances, the promotion of a private-public partnership in care service provision, and the establishment of the "Long-Term Care Security System for the Elderly". In sum, South Korea has shifted away from a non-interventionist family policy model towards a pro-traditional family policy model.

Taiwan: Post-war Taiwan has experienced both industrialisation and democratisation. Much of Taiwan's family policy reform could be explained by the intensification of political party electoral competition.

Therefore, much of the policy reform happened in the past decade. A major breakthrough occurred in 2004 when the Executive Yuen passed a bill on family policy reform. The core idea of the reform is “to support the family rather than to unlimitedly invade or control it”. Among the most significant reforms are “A Ten-Year Plan for Promoting the Long-term Care System”, the promotion of a community-based care system, and the promotion of gender integration. In sum, while the government plays a more elaborate and significant role in financing care services, it is still influenced by the non-interventionist and the pro-traditional family policy model.

China: Of the four cases, China can be regarded as a latecomer to industrialisation, not to mention democratisation. Yet, China shares a number of similarities with the other three cases, especially in its productivist orientation, that is, with social policy subordinated to economic policy. Therefore, much of the family policy formation in China can be understood in terms of its role in fostering economic development, a notable example being the one-child policy. While there is growing public concern recently about the population ageing issue, the Chinese government continues to subordinate family policy to its economic development policy. As such, adult members (who are supposed to benefit from the fast-growing economy) are expected to take care of the young and elder family members. Therefore, the government’s involvement in both childcare and elderly care is limited so that its family model is closer to the non-interventionist model.

Chapter 2

Japan: Towards a More Interventionist Policy by Socialising Care Services

The post-war Japanese welfare system has been based on maintaining a traditional gender division of labour both in the household and in the wider society, that is, men serving as wage earners and women serving as homemakers and caregivers. In addition, the Japanese state has long shown a reluctance to intervene into family affairs. Therefore, we can classify Japan as a hybrid between the pro-tradition and the non-interventionist family policy model. However, this policy model has faced serious challenges since the mid-1970s due to a series of socio-demographic changes. The most significant demographic challenges include population ageing, declining fertility rate, delay of marriage, and the rising female labour participation rate. While Japan was among the first Asian societies to industrialise and democratise, its economic stagnation and the intensifying competition among political parties during the 1990s have compelled the Japanese government to become more responsive to social problems resulting from the demographic changes. As a result, family policy reform initiatives have been picking up pace and expanding in scale since the 1990s, with the overall direction being to provide more public support for care services while accommodating female labour market participation. All in all, family policy development in Japan demonstrates how the East Asian Welfare System reaches its limit when economic growth stagnates. As the legitimacy of the authoritarian state weakens, the government

seeks to shore its support by proposing policy reform in response to heightened public concerns. During the 2000s, the Japanese family policy model has become more interventionist, even though it continues to have a relatively strong orientation towards the pro-traditional model.

1. The Post-war Family System and its Transformation

The post-war family system of Japan was developed on the basis of a gender division of labour between a male breadwinner and female homemaker, with one or two children. During the early post-war years, this family model was sustained and developed based on three mutually-reinforcing socio-demographic developments (Takeda 2005):

1. A relatively high percentage of housewives: the number of full-time housewives more than doubled from 5 million in 1955 to 11 million in 1980.
2. A steadily decreasing number of children per household and a decreasing birth rate: first, the birth rate fell drastically after 1949 as the post-war baby boom ended. Second, this was caused by a decrease in the number of children per household, rather than by an increase in either the number of childless couples or single people. That means that married couples generally limited the number of children they had.
3. The growing significance of the nuclear family: a common arrangement was that the first child (usually the eldest son in early post-war Japan) stayed with parents even after getting married, while the other children formed their own nuclear families.

This family model was complementary with a corporate-centred organisational framework which underpinned the post-war Japanese welfare state system (Peng 2002). Put simply, the whole political and economic framework relied heavily on two premises: first, a family model which is based on the husband going out to work and the wife staying at home; and second, a corporatist welfare model in which the state supported the corporations and expected these corporations to take care of their employees' welfare.

With the Japanese state geared “primarily to the provision of social need in pursuit of its nationally oriented productivist ethos” (Vij 2007: 156), the early post-war decades actually saw the state shifting welfare responsibilities to the family and the corporations (Vij 2007). Therefore, welfare state expenditures were heavily concentrated on the fields of health and pensions (Aspalter 2001). Supported by a cultural norm that “family problems are best dealt with in the family” (Kingston 2004: 260), the Liberal Democratic Party (LDP) and its ruling coalition has for decades shown a strong inclination towards a non-interventionist, conservative approach to family affairs. An indicative example of this non-interventionism is that the Japanese government did not pass the Child Abuse Prevention Law until 2000.

The division of labour between the state, business and families remained relatively stable when the post-war economy was fast-growing. It could run smoothly as long as the companies did well, thus enabling them to pay the “salarymen” high enough wages so that their wives

could stay at home and take care of the children and the elderly. However, the experience of stagflation in the Japanese economy in the early 1970s prompted some major transformations in the Japanese welfare system. At that time, the policy debate actually reinforced the “productivist” welfare system, that is, meeting consumption needs was the responsibility of individuals, whereas the rights of citizens to state-provisioned welfare did not (and should not) extend to providing for individualized needs (Vij 2007). For instance, the Life Cycle Plan put forward in the 1980s demonstrated strong support for the notion of self-reliance by placing the primary focus on the provision of lifetime education, secured pensions, health care, and ownership of private housing (Vij 2007). All in all, throughout the post-war decades, the burden of maintaining livelihood is based on individuals working, and the burden of care has been placed mostly on the family in general and on women in particular. This continued to be the case, until the prolonged recession of the 1990s posed an even more serious challenge for the Japanese welfare model. In face of a series of socio-demographic challenges, it is becoming evident that both the corporations and the families had come to find it increasingly difficult to fulfil their respective roles in the “old” welfare model. Not surprisingly, the Japanese family policy model has undergone significant reform since the 1990s.

2. The Socio-demographic Challenges To the Post-war Family Model

A series of socio-demographic changes is weakening the post-war

Japanese family model, especially since the 1980s. This situation has been continuing, if not worsening, into the 2000s:

- Divorce has been become more common. The contemporary divorce rate is nearly triple the level of the 1960s. The divorce rate (calculated in terms of the number of divorce per 1,000 persons) was 0.74 in 1960, and lower than 1.0 throughout the 1960s. The figure rose gradually from 0.93 in 1970 to 1.22 in 1980, and then jumped to 2.10 in 2000. The record high was in 2002, when there were 290,000 divorce cases, more than double the figure of 142,000 cases in 1980. In 2006, there were 257,000 divorce cases, which translates into a divorce rate of 2.04 (Statistic Bureau, Japan Government 2009).
- Childbirths have declined as a result of the falling fertility rate. The total fertility rate (calculated in terms of the average number of live-born children produced by a woman of child-bearing age) gradually dropped from a high point of 4.54 in 1947 (with the number of live births at 2,679,000) to 2.00 in 1960 (1,606,000 live births), 2.13 in 1970 (1,934,000 live births), 1.75 in 1980 (1,577,000 live births), 1.54 in 1990 (1,222,000 live births), and the record low of 1.26 in 2005 (1,063,000 live births). As of 2006, the total number of live births was 1,093,000, and the total fertility rate is 1.32 (Statistic Bureau, Japan Government 2009).
- The marriage rate has fallen. The marriage rate (calculated in terms of the number of marriage per 1,000 persons) was 9.3 in 1960, 10.0 in 1970, 6.7 in 1980, 5.8 in 1990 and 6.4 in 2000. As of 2006, the marriage rate was 5.8 (Statistic Bureau, Japan Government 2009). The decline in the marriage rate is closely related to the trend of

delayed marriage and the increasing number of unmarried persons (Statistic Bureau, Japan Government 2009): as of 2005, of 4,065,000 male persons aged 40-44, there were 896,000 persons who are never married (22.0 percent), and of 4,015,000 female persons aged 40-44, there were 484,000 persons who are never married (12.1 percent). Of 3,868,000 male persons aged 45-49, there were 663,000 persons who are never married (17.1 percent). Of 3,858,000 female persons aged 45-49, there were 317,000 persons who are never married (8.2 percent).

- There is also a clear trend of delayed childbirth, when we observe trends in live birth rates by age group of mothers. Over the past four decades, live birth rates decreased among mothers in their 20s, and increased among mothers who are in their 30s. In particular, for those aged 20-24, the live birth rate decreased from 107.2 in 1960 to 96.5 in 1970, 77.1 in 1980, 44.8 in 1990, 39.9 in 2000 and 37.6 in 2006. For those aged 25-29, the live birth rate varied from 181.8 in 1960, 209.2 in 1970, 139.8 in 1990, 99.5 in 2000 and 87.8 in 2006. For those aged 30-34, the live birth rate varied from 80.1 in 1960 to 86.0 in 1970, 73.1 in 1980, 93.2 in 1990, 93.5 in 2000 and 89.9 in 2006. For those aged 34-39, the live birth rate varied from 24.0 in 1960, 19.8 in 1970, 20.8 in 1990, 32.1 in 2000 and 38.1 in 2006 (Statistics Bureau, Japan Government 2009).
- The delay in both marriage and childbirth is associated with increasing female participation in the workforce, particularly for those aged 25-34. The female labour force participation rate in this age

group has increased from 52.1% in 1985 to 60.2% in 1995, and 69.8% in 2005 (Statistic Bureau, Japan Government 2009). The figures for other age groups have by comparison remained rather stable: the female labour force participation rate for those aged 20-24 was 71.9% in 1985, 74.1% in 1995, and 69.8% in 2005; and for those aged 35-44, 63.7% in 1985, 65.4% in 1995, and 66.7% in 2005 (Statistic Bureau, Japan Government 2009).

As a result of these demographic changes, population ageing has become a more pressing public issue from the late 1980s. In particular, elderly care has caused major public concerns (Kingston 2004): in 1980, nearly 70 percent of the population over 65 lived with their families, but by the late 1990s, the figure had dropped to about 50 percent. This explains the expansion of home-care services (local municipalities dispatch nurses to care for the elderly at home), with an estimated 2 million plus elderly enrolled in the plan as of 2000.

3. Continuity and Reform in Family Policy

The post-war Japanese family policy model was based on the premise that husbands should be responsible for supporting the livelihood of family members through productive employment, with wives responsible for caring for both children and the elderly. Throughout the 1950s to the 1980s, family policy formation and change had shown strong consistency with this model. However, during the 1990s and the 2000s there were signs that the state was departing from this older

model and moving towards playing a more active and explicit role in family affairs, especially in the area of financing care services. We will first summarise the latest developments in Japan's family policy before outlining how various areas of family policy have evolved since the 1950s.

3.1. The Latest Developments in Family Policy

In February 2007, the Japanese government established a study group, comprised of related ministers and experts under the Council on Measures for a Society with a Decreasing Birth Rate, on priority measures of a "Japan that Supports Children and their Families". The *2007-08 Annual Health, Labour and Welfare Report* of the Japanese Government shows the Ministry of Health, Labour and Welfare is looking to transform its family policy by reorienting it in a more explicit and interventionist direction. A key statement in this regard is that "it is necessary to break the structure of having to choose between work and childbirth/childrearing" (Chapter 6, Section 1). Major initiatives are based on "the general principles concerning measures for a society with a declining birth rate" (Chapter 6). A major objective is to "create an environment so that people in Japan can get married and give childbirth as they wish" (Chapter 6 Section 1). Major family policy measures include the following:

a) Cash Allowance

Effective from April 1, 2007, the child allowance system has been expanded to cover all families with children (Ministry of Health, Labour

and Welfare 2007):

- The cash allowance for children under the age of three: the first and second child receive an increase to 10,000 yen per month from 5,000 yen per month, whereas that for the third and additional children remains unchanged at 10,000 yen per month.
- The cash allowance for children aged three and above: the scheme remains unchanged, giving 5,000 yen per month for first and second child and 10,000 yen per month for third and additional children.

b) Child Care Provision

- As of 2007, among females with children aged 3 or younger, 80 per cent of such children are being cared for at home (Annual Report 2007-08). Yet, as of 2004, the enrolment rate in daycare for children aged 4 stood at 95.2 percent, and for those aged 5, 96.6 percent (OECD Family Database 2009).
- “In order to promote day care services by diverse entities and expand childcare support for all families while maintaining a certain level of quality, legal family-type day care services (nursery mothers), temporary day care services for all children, infant family home visit services (Hello Babies Services), nurturing support visit services, and community-based childrearing support centre services will be established to promote implementation of services in municipalities” (the Draft Law to Amend the Child Welfare Law) in principle to be enforced from April 1, 2009.
- The government proposed to expand community-based childrearing support centres to 6,000 locations.

- Aside from quantitative improvement, these centres are being improved through such service programmes as family support centres (i.e. community-based membership organisations comprising people who are eager to provide support and those who are eager to receive support) to engage in mutual assistance activities. This becomes a form of informal care system for short-term childrearing support services due to parental needs arising from overtime work, business trips, or sickness of their parents.
- Hello Babies Service is a home visit service for infants 4 months after birth that is intended to strengthen ties between families with infants and local communities.
- Day care centres: since 2002, the goal of “zero wait listed children” had been promoted. In fact, the number of children on waiting lists decreased for four consecutive years to 18,000 as of April 2007, and the official projection is that there will be 2.15 million children accepted at day care centres by 2009.
- Children Garden System: a certified children’s garden system has been enforced since October 2006. This is a system in which prefectures certify kindergartens and day care centres that provide integrated education and day care for preschool children and community-based childrearing support. As of April 2008, 229 facilities were certified in Japan.
- After-school Children Plan: This Plan is designed for children aged roughly 10 or younger who need to be taken care of after school (such as those from dual income families). These after-school children clubs utilise spare classrooms after regular school hours. As of May

2007, after-school clubs had been established in 16,685 locations with 749,478 children registered in the Plan. Efforts are being made to promote the Plan so that it will be implemented, in principle, in every elementary school district.

c) Leave Arrangements

There are three major leave schemes: (OECD Family database 2007):

- Maternity Leave: As of 2007, Japan provides 14 weeks of maternity leave, with the allowance accounting for 60 percent of the salary.
- Parental Leave: As of 2007, Japan provides parental leaves of up to 52 weeks, which can be used by either parent. During the leave period, employees get paid at rates ranging from 30 percent to 60 percent of their usual salary.
- Family Care Leave: The “Child Care and Family Care Leave Law” is included in the Act on the Welfare of Workers Taking Care of Children or Other Family Members. Employees who take leaves to take care of family members with special needs receive a subsidy equivalent to about 40 percent of their normal wages through their employment insurance.

d) Elderly Care Arrangements

The Long Term Care Insurance (LTCI) scheme was launched in 2000. This marked the first time an Asian country has provided public financing for elderly care in both community-based home care and institutional care (APPR International 2006).

- The scheme will pay 90 percent of the expenses for the policy holders

who are certified in need of care in various forms, including home based services (such as home help services, home-visiting nurses, day services, day rehabilitation services, short stay, equipment rental services, etc.) and also institutional care (such as special nursing homes for the elderly, health service facilities for the elderly, hospital with care services, etc.) Policy holders will have to pay 10 percent of the expenses.

- Between 2001 and 2006, the number of insured persons aged 65 and over has increased approximately 3.4 million, up 16 percent of all persons 65 and older.
- The number of persons certified in need of care increased approximately 1.9 million, up 87 percent over the same period.
- The number of service users increased. In particular, residential service users have increased approximately 1.49 million, up 153 percent in a period of about five years. Meanwhile, the institutional service users also increased by approximately 0.25 million, up 49 percent over the same period.

All in all, the Japanese state is already playing a substantial role in financing both child care and elderly care, even though home-based and community-based care are often prioritised over centre-based institutional care (particularly in the area of elderly care).

3.2. Major Shifts in Japan's Family Policy

During the 1950s, family planning was the primary focus in Japan family policy. Major family planning measures in the 1950s included

the passage of the Eugenic Protection Law, which permitted abortion for economic reasons. As a result, Japan had a very high abortion rates during the mid-1950s. This also explains not only why Japan maintained a relatively small household size in the post-war decades, but also why women were able to provide unpaid care work for children and the elderly at the same time (Takeda 2005). From the 1970s, concern has been growing over the sustainability of the social welfare system in Japan (Takeda 2005). There were signs in the early 1970s that the Japanese government was ready to expand its welfare provision as evidenced by the enactment of the Child Allowance Law in 1971 (Aspalter 2001). However, the Japanese economy was hit hard by the oil crisis in 1973, pushing the Japanese government to cut welfare expenditures (Kono 2005). Not until population ageing aroused widespread public concern throughout the 1980s did the Japanese government initiate major reform. During the 1990s, it became obvious that family responsibilities had become too much for women to bear, as shown by both declining marriage rate and declining birth rate. Hence, a series of policy reforms have been launched since the 1990s.

The 1980s and 1990s: Ageing Society as a Public Concern

Japan's elderly care system was long underdeveloped. Home care service started in the 1950s, but spread rather slowly. By 1980, there were only 9,700 home helpers employed by local governments across Japan (Maeda 2001 as quoted in Maeda and Ishikawa 2006: 456). Day care and short-term stay services for the elderly were introduced on a significant scale from the 1970s. The first pioneering programme in

day care and short-term stay services was started in 1975 by a voluntary organisation. In 1978, the national government established a national subsidy scheme for short-term stay services and another for day care services a year later. However, the development of these two types of services was slow, mainly due to the lack of financial resources, until the implementation of the national Long-term Care Insurance scheme in 2000 (Maeda and Ishikawa 2006: 456)

During the 1980s, cutting welfare expenditure was the major theme. A major policy debate during the early 1980s resulted in pension reform in 1986, which shifted the elderly care responsibility to the family (Ogawa and Rutherford 1993). In 1983 the government abolished the free medical service programme for those aged 70 and over after operating for 10 years. Since 1984, all insured persons must cover 10 percent of their medical costs. In 1986, pension benefits were also reduced. Starting in 1985, a series of White Papers issued by the then Ministry of Health and Welfare addressed the question of the optimal mix between public and family support for the elderly. A major theme was a gradual shift from public support to home care for the elderly.

A major initiative was the Gold Plan in 1989 designed to promote home care for the elderly by expanding social services such as home helpers and community-based care facilities. The extension of social and personal care services for the elderly was achieved under the government's Gold Plan of 1989, and further extended in the New Gold Plan of 1995 (Aspalter 2001). The Gold Plan aimed at increasing the

planned level of care services for the elderly, particularly those living in the community. The New Gold Plan increased the planned level of care services for the elderly. In 1997, the government enacted the Chronic Care Insurance Law, further “socialising” care responsibilities in a rapidly ageing society (Aspalter 2001). Under the Gold Plan, the development of community care services for the elderly was given priority, as these services were significantly less developed than institutional care. The Gold Plan was extensively revised after five years. The New Gold Plan was launched in 1995, aiming to achieve a ratio of one home helper to 128 old people, to increase the number of day care centres for the elderly from 1,080 in 1989 to 17,000 in 1999, and to establish 10,000 home care support centres which provide guidance and care management for the elderly and family caregivers (Peng 2000).

A noteworthy development in Japan’s elderly care policy is that Japan is one of the first Asian countries to shift the focus from providing medical care to long-term care. This is a move away from the old model that the public sector’s proper role is the provision of medical care while other types of care can more appropriately be provided by unpaid family members and the voluntary sector. An unintended consequence of the old elderly care model was that there may be over-utilisation of expensive forms of (hospital and other institutional) care so that the length of hospitalisation is high in Japan relative to other developed countries (Yoshikawa et al. 1996). A major problem was the stark choice between either the family providing home care or institutional

care for those for whom family care was unavailable.

The national government established a task force in 1994 for the development of a comprehensive elder care delivery system. In 1996, the Ministry of Welfare, Labour and Health released the first draft of its plan to create a national long-term care insurance (LTCI) scheme. The LTCI scheme came into effect in April 2000, covering both community care and institutional care services for adults aged 40 or older. This scheme is crucial for the development of Japan's elder care system because it is practically the only source of funding for community care services for the elderly (Maeda and Ishikawa 2006). Meanwhile, the Government also renewed the New Gold Plan as the Gold Plan 21 in 1999. As the LTCI scheme created a larger demand for elder care services, the goal of the Gold Plan 21 was more ambitious. Under the Plan:

- The number of home helpers will increase from 176,450 in 1999 to 350,000 in 2004. This means that the ratio between home helpers and the elderly population would be 1:69.7.
- The number of day care centres would be increased from 13,350 in 1999 to 26,000 in 2004. This means that there would be one day care centre per 938 elder persons.
- The number of beds allocated to short-term stay services will be increased from 57,085 in 1999 to 96,000 in 2004.
- The number of visiting nurse stations would be doubled from 4,470 in 1999 to 9,900 in 2004. This means that there would be one station per 2,460 elder persons.

The Long-Term Care Insurance scheme proved to be a radical departure from the traditional care model in which the family takes on the primary responsibility, making Japan the first Asian country where the state has substantial responsibility for bearing the costs of long term care for the elderly (Timonen 2008: 132-133). One major justification for this turn is that the new scheme could reduce inappropriate hospitalisation and rising health care insurance costs as a result of an increasing numbers of old people being hospitalised because no informal care is available. In the LTCI scheme, 50 percent of the cost of long term care insurance is covered by general taxation, 32 percent by employee contributions, and 18 percent by pensioner contributions. The service user pays 10 percent of the cost of care services and the remainder is borne by municipalities. Approximately three-quarters of recipients opt for home care, and one-quarter institutional care.

1990s and 2000s: Work-Family Balance as a Major Policy Goal

The “1.57” shock in 1989 (when the total fertility rate dropped to an unprecedented low of 1.57) was a turning point for Japan’s family policy, especially in the area of childcare provision. It drew the public’s concern to the inter-related problems of “super low fertility” and “hyper-ageing society”. In 1992, the Japanese government set up the Study of Fertility Trends and Family Policy, setting the stage for the upcoming policy reform (Gauthier 1996).

A major reform in family policy was the launch of the Angel Plan in

1994, developed by the Ministry of Health and Welfare, in response to the growing concern with the increasing demand for childcare services. It sought to increase the number of day care centres and to improve their services (Usui and Colignon 2008: 9-11). The government also announced in 1997 the *New Angel Plan*, a five-year plan which sought to improve childrearing related services by expanding:

- Childcare centres to accommodate infants (0-2 years old) from 580,000 infants in 1999 to 680,000 in 2004.
- Extended-hour (more than 11 hours) day care centres from 7,000 in 1999 to 10,000 in 2004.
- Childcare centres open on holidays from 100 in 1999 to 300 in 2004.
- Temporary centres for babies and infants from 450 centres in 1999 to 500 centres in 2004
- Multi-function day care centres from 2000 in 1999 to 3000 in 2004
- Local childrearing support centres from 1,500 in 1999 to 3,000 in 2004
- Temporary childcare from 1,500 in 1999 to 3,000 in 2004
- Family support centres from 62 in 1999 to 180 in 2004
- After school clubs for lower-year elementary school children from 9,000 in 1999 to 11,500 in 2004.

In addition to providing childcare for pre-school children, Japan also provides subsidised after-school care for children in the first three years of elementary school (generally children under the age of 10). Both

licensed and unlicensed centres are available. The distinction is that the licensed centres provide better services, but with inflexible hours and a long waiting list, whereas the unlicensed centres provide flexible services but lack the stamp of quality assurance from the government authority. In 2001, 21 percent of children younger than 3 years old were in day care centres in Japan (Peng 2002).

In addition to childcare, the Angel Plan also made leave arrangements more generous. Maternity leave was introduced in Japan in 1947 as part of the national labour standard law. Women are entitled to a 14-week maternity leave, six weeks before the baby is born and eight after. They are entitled to 60 percent of pay during this leave, and a lump sum payment that generally covers the direct costs of a normal birth (Boling 2006). A major expansion was made in 1992, when a parental leave law was passed that provided a year-long job protected leave for either parent to take care of infants. It is mandated that they should be paid 25 percent of their normal pay (which was further increased to 40 percent of normal pay in April 2000) (Boling 2006).

From the development of Japan's family policy, it is clear that the Japanese government has been taking on a more active and elaborate role in supporting care services, so that families, in particular women, are supported in providing their care function for both the elderly and children. A lot of care-related leave legislation has been introduced since the beginning of the 1990s to enable women to balance their work and family care responsibilities more effectively (Peng 2002). Parental

leave legislation was established in 1991, and became mandatory from the fiscal year 1992 for companies with more than 30 employees (Peng 2002: 56). The legislation even allowed parents to take up to one year of leave after the birth of the child, without the loss of employment status and seniority. During this leave, unemployment insurance will pay 25 percent of the salary and all of the employment-related social insurance premiums. This law was revised to include care leave of up to one year for workers who need to take care of their disabled spouses or elderly relatives. After all, the 2000s saw the Japanese state actively expanding the provision of care services.

4. Family Policy and Family Change in Japan

Policy reform in Japan since the 1990s is clearly a response to the failure of the three-generation household policy of the 1980s. Under the early post-war family policy, the Confucian tendency to protect the traditional family model put disproportionate burden on women. This also explains why the old family policy model was deemed unsustainable with the decline of the three-generation household and the increase of female labour market participation.

Reducing the Disproportionate Childcare Burden on Women

The traditional division of labour remains significant, as the family has the primary responsibilities for taking care of family members. Thus, informal care (i.e. family and community) is far more important than formal institutions in providing the care function. It is estimated that

families provide 75 to 80 percent of the overall care responsibilities in Japan (Timonen 2008). From the 1990s to 2000s, there was a major development for easing the burden of family-work responsibilities by expanding public support for care services. Despite the Angel Plan (1994) that was implemented to enhance public childcare provision, there were still complaints about the scarcity and inflexibility of childcare services. As of 2001, only 23 percent of children under the age of six were enrolled in public day-care facilities. This reflects the fact that only 11.2 percent of married mothers have full-time jobs. While there are private childcare services, they are relatively more expensive and thus less affordable.

Indeed, frustration over the inadequacies of childcare services in Japan has long existed, especially among working mothers (Wada 2006). Japanese childcare services are of high quality and affordable, but they are scarce and inflexible. The fees for licensed private day care centres and licensed public day care centres are equivalent. The fee depends on family income, and most families pay less than the maximum fee. Not surprisingly, demand for childcare exceeds supply. Because of the limited supply of day care centres for children under the age of three, waiting lists are long. Even when children are enrolled, women are often forced to augment public day care with after-care in the private sector for such services as extendable care and care for ill children. Even among the licensed childcare facilities, the availability of flexible services such as extendable care, night care, or interim childcare is greater in the private sector. This is partly due to the rigid employment

system of the public employees that hinders the use of overtime work and the hiring of part-time helpers. The problem is particularly acute in urban areas, where the female labour force participation rate is higher (Wada 2006). In sum, the childcare support policy may need further expansion. In this vein, the recent government initiative Plus One (2002) aims to shorten working hours and make firms partners in promoting childcare leave.

Seeing Elderly Care as a Public Responsibility

With the three-generation family becoming increasingly vulnerable, Japan has seen the responsibility (at least in terms of financing) of elderly care being shifted from the family to the state (Timonen 2008). In 1980, nearly 70 percent of the population over 65 lived with their families, but by the late 1990s, this figure had dropped to about 50 percent (Kingston 2004). This explains the expansion of home-care (local municipalities dispatch nurses to care for the elderly at home) as supported by the LTCI scheme. Indeed, the LTCI was introduced in 2000, with one of its major aims being to reduce inappropriate hospitalisation and rising health insurance costs that resulted from the hospitalisation of the elderly when informal care was available. This made Japan the first Asian state to shoulder the financial responsibility of elderly care in a significant manner.

In sum, Japan is now more prepared to accommodate the problem of population ageing by financing the long-term care needs of the elderly. Comparatively speaking, however, Japan still relies on women to

shoulder the responsibility for balancing their needs for work and childcare.

5. Concluding Remarks

Japan ranks as one of the most developed economies in the world. However, its welfare system is less developed than those in Western Europe. For several decades after the Second World War, social policy was subordinated to economic development policy. Aided by the fast growing economy, the societal division of labour was relatively stable and the level of legitimacy of the government was relatively high. The whole system experienced growing strains amid economic stagnation in the 1990s, as evidenced by the decline of male-dominated three-generation household. With both the family and the service economy requiring a higher level of female labour force participation, many of the demographic changes that followed posed serious challenges for Japanese society. One of the most serious challenges, especially for women, is balancing work and family obligations. While this problem has been present for decades, the government did not respond proactively to it until competition among political parties intensified during the 1990s. Thus, economic development set a general policy direction towards the “socialisation” of both childcare and elderly care services, whereas the government’s struggle for political legitimacy is a major motivation for undertaking significant policy reform.

Still, Japan's family policy development shows the influence of the Confucian tradition. First, family has always been the centre of the care provision for both the elderly and the children. Second, women have long assumed the responsibilities of being homemakers and caretakers. Third, even with family policy reform since the 1980s, the government tends to prefer to take up the role as a finance provider over the role as a service provider. This is particularly evident in elderly care reform in which community-based and home-based care are both prioritised over institutional care. However, since the Confucian tradition did not really stop the trend of rising female labour force participation, the state has come under increasing pressure to be more pro-active in providing family care service. Not surprisingly, Japan became the first East Asian country in which the state has taken on a more active role in intervening into family affairs.

Chapter 3

South Korea: Towards a Social Investment State by Promoting the Care Services Industry

The development of South Korea's welfare policy clearly illustrates its status as a developmental state, in that political legitimacy is based on achieving continuous economic development, and social policy programmes are designed as a way to enhance political legitimacy. However, since the transition to political democracy in the late 1980s, the Korean welfare state system has become more inclusive and steadily expanded its welfare provision institutions. Nevertheless, the most significant welfare reform agenda was not launched until the 1997 financial crisis hit the Korean economy hard, followed by Kim Dae-Jung's election as the president. Entering the 21st century, South Korea has become more actively involved in family affairs. One illustration is the restructuring of government ministries in 2008 that involved the establishment of the Ministry for Health, Welfare and Family Affairs through a merger of the Commission on Youth Protection, the Family and Childcare Business of the Ministry of Family and Gender Equality, and the Social Disparities Measures Authority of the Ministry of Planning and Budget. Currently, two of the most pressing public concerns are a fast-ageing population and a very low fertility rate. With the new ministry, Korean family policy has been transformed from an implicit to an explicit basis and from a non-interventionist to a more pro-active orientation, with a new policy direction being to work towards a better work-life balance through private-public partnerships

for childcare and elderly care. Of particular significance in South Korea's policy reform is a long-term social investment strategy that aims to integrate social and economic development by creating a virtuous circle of positive returns flowing between economic growth and social welfare development.

1. The Post-war Family Policy Model and its Transformation

Not only has South Korea followed a state-led economic development model similar to that of Japan; both societies also have had a lot of similarities in their socio-political arrangements. Social policy in South Korea can be understood historically as a way for an authoritarian regime to enhance its political legitimacy, whereas political legitimacy is maintained on the basis of steady economic growth and full employment. For this reason, South Korea has been labelled a "productivist welfare regime" in which even welfare provision is intended to serve the purpose of economic development (Holiday 2000; Gilbert 2004). Even though welfare policy underwent major expansion during the 1980s amid the transition to political democracy, social policy remained subordinated to economic development policy until the 1997 financial crisis. The past decade, however, has witnessed a major reform with respect to the lessening of women's burden through the expansion of social care.

Korea's social policy regime, like that of Japan, shows a strong orientation towards familism in that the households are expected to

shoulder an extensive set of welfare obligations (Peng 2009). Traditionally, care responsibilities are assigned to women in the households with almost no alternative to family-based care. Until recently, Korean social policy had been characterised by very minimal state support for the family and limited means-tested social welfare. Actually, family has historically played a very significant role in welfare provision in South Korea by providing the bulk of child and elderly care (Peng 2009). In our view, this model is supported by three mutually reinforcing systems in South Korea:

1. A “familialistic” model of welfare provision, as in the case of Japan, can run smoothly as long as the developmental state spurs significant economic growth, business provides well-paying jobs for their male employees, and the family supports the welfare of its members. Actually, this division of labour between the state, business and families can be regarded as the backbone of South Korean society for decades after the Second World War.
2. A gender division of labour is based on a traditional patriarchal order. The family model has been based on the assumption of a male breadwinner and a female homemaker so that Korean women have taken on a subservient position in the household and a secondary status in the labour market. The traditional gender division of labour has also been evident in extensive employment protection legislation (which supports the male breadwinner family model) and stratified social insurance systems (which have favoured and protected full-time male workers) (Park 2005).
3. A generalised reciprocity between generations is based on the

traditional value of filial piety. The three-generation household and inter-generational economic transfer have long been cultural norms in Korea, to the extent that “most Korean people still think it shameful to have their parents cared for by non-familial members and to have them institutionalised in homes for the aged or in nursing homes” (Choi 2002: 97). This also explains why the population ageing issue began to receive public attention at the turn of the 1970s, but continued to be neglected by the government due to its focus on economic growth strategies (Choi 2000).

However, the post-war social order showed signs of destabilisation in the 1980s. In this context, the intense political struggles during the 1980s and the eventual political democratisation are the key factors that account for the subsequent expansion of welfare policies. On the one hand, steady economic development enabled the authoritarian state to enhance its political legitimacy by launching some redistributive policy measures. On the other hand, the intensifying social protests, particularly the so-called Great Labour Struggles in 1987, made it imperative for the Chun government to make concessions (Kim 2007). In fact, the year 1988 is widely regarded in South Korea as a watershed in the formation of the Korean welfare system. In that year alone, the National Pension and the Minimum Wage Law were enacted, while the National Medical Insurance system was expanded to cover the entire population. Therefore, in the late 1980s, Korea was regarded as one of the leaders among the newly industrialised economies (NIEs) in terms of social security reform, with major policy changes coming after the

transition to democracy (Kuhnle 2004).

Nevertheless, not until the 1997 Financial Crisis (this was also when the reformist Kim Dae-Jung was elected President) did the Korean government launch a “paradigm shift” in its welfare policy. According to OCED estimates (quoted in Kim 2003:273-4), Korea spent 8 trillion won (4.52 percent of its gross domestic product) on social security in 1990, but the amount rose to 30 trillion won (6.65 percent of GDP) in 1997, and jumped to 11.09 percent of GDP in 1998. Those increases indicate budget outlays for social assistance and unemployment insurance had expanded. Not surprisingly, there are suggestions that Korea is moving closer to the European welfare state model (Kuhnle 2004). All in all, the political and economic shifts in 1997 created a major turning point for Korea’s social policy.

2. The Socio-Demographic Challenge Facing the Korean Family Model

Even though South Korea is one of the most developed economies in the world, the familialist tradition remains relatively powerful. While Korea has experienced some of the same demographic trends as found in many western countries, the pace is quite different. While the fertility rate is declining and population ageing is speeding up in a very significant pace, the increase in both the divorce rate and the female labour force participation rate are relatively less significant than is the case in many of the OECD countries, as discussed in the following:

- Population ageing: The South Korea government acknowledges that the country became an “ageing society” from 2000, when the percentage of South Koreans aged 65 or older reached 7.2 percent of the population. The official projection is that the figure will reach 14 percent by the year 2018 (Korea National Statistical Office 2007). This projected pace would make South Korea age even faster than Japan, which took 24 years (from 1970 to 1994) for the share of elderly in the population to double from 7 to 14 percent (Howe et al. 2007). This in turn creates a burgeoning demand for elderly care, with an estimated 19 percent of the elderly in South Korea potentially requiring long-term care in 1998 (Choi 2002: 73).
- Very low fertility rates: In 2005, the live birth rate stood at 9.0 babies per 1000 persons. The trend of a declining total fertility rate is clear: the figure was 2.08 in 1983, 1.59 in 1990, and 1.47 in 2000. The total fertility rate of South Korea was 1.13 in 2006, which is very low among OECD countries (Korea National Statistical Office 2007). Considering that Korean women gave birth on average to 6.0 children in 1960, fertility has been sinking at a blistering pace (Howe et al. 2007). The continuous decrease in the number of newborns in turn speeds up population ageing in South Korea.
- Female labour market participation rate is increasing gradually: The significant decline in the fertility rate is associated with the growing tendency for more young Korean women to prefer jobs over marriage and motherhood. In the past few decades, the female labour market participation rates have increased significantly. However, the current level is relatively low by the standards of OECD countries: as

of 2005, the female employment rate was 52.5 percent as compared with the OECD average of 56.1 percent (OECD Family Database 2009). As of 2008, the labour market participation rate of women aged 25-54 was the third lowest among OECD countries (OECD 2008). This could mean that the traditional gender division of labour remains relatively strong in South Korea, despite some weakening in recent years.

- Marriage is still a relatively strong social institution despite delayed marriage: The crude marriage rate has been declining but at a relatively slow rate, standing at 9.3 in 1990, 8.7 in 1995, 7.0 in 2000 and 6.5 in 2005. The crude divorce rate also shows a steady increase but remains relatively low, standing at 1.1 in 1990, 1.5 in 1995, 2.5 in 2000 and 2.6 in 2005. As for the age of first marriage, the figure for men rose from 27.8 in 1990 to 28.4 in 1995, 29.3 in 2000 and 30.9 in 2005, whereas the figure for women rose from 24.8 in 1990 to 25.4 in 1995, 26.5 in 2000 and 27.7 in 2005 (Korea National Statistical Office 2007). Despite an obvious trend of delayed marriage, the percentage of never married people remains relatively low in Korea. In 2000, the percentage of those single was 71 percent for males aged 25-29, 28.1 percent for males aged 30-34, and 10.6 percent for males aged 35-39, whereas the figure was 40.1 percent for females aged 25-29, 10.7 percent for females aged 30-34, and 4.3 percent for females aged 35-39 (Official statistics quoted in Eun 2003a: 587). Marriage remains a strong social institution in Korea, demonstrating the continuing significance traditional family values in South Korea.
- Nuclear family is becoming more common: the average number of

people per household has decreased continuously from 5.1 in 1975 to 4.6 in 1980, 3.2 in 2000, and 2.8 in 2005. This indicates a clear trend towards more nuclear families. Actually, the number of two-generation households is gradually increasing, whereas the number of one-generation and one-person households is increasing sharply; the number of three-generation (or more) households is steadily decreasing. As a result, the number of households increased from 6.65 million in 1975 to 14.31 million in 2000, and 15.89 million in 2005 (Korea National Statistical Office 2007).

- Fewer elderly people are living with their children: the nuclearisation of the household also means that elderly people are more likely to live in a separate household from their children. The trend is obvious, as the percentage of Korean elderly (aged 65 and over) living with their children has fallen continuously from 81 percent in 1980 to 75 percent in 1985, 68 percent in 1990, 57 percent in 1995, 49 percent in 2000, and 44 percent in 2004 (Howe et al. 2007). Yet, the traditional value of intergenerational reciprocity is still strong in South Korea, as evidenced by a higher-than-average percentage of three-generation households as compared to other developed countries, and a very strong cultural norm of intergenerational economic support as compared to other developed economies (Peng 2009).

All in all, the Korean family model is at a crossroads. Whereas traditional family values and the gender division of labour remain relatively strong, there are clear signs that women are increasingly reluctant to deal with all the expectations attached to their numerous

social roles as a wage earner, a daughter, a wife, a mother and a daughter-in law. As a result, many of them delay their marriage, give birth to fewer children, and/or live in a separate household from their elder generations. With the old family model losing its appeal to many young women, the post-war family policy model is also due to change.

Figure 3.1: Family Policy of South Korea in the 21st Century



Source: Ministry for Health, Welfare and Family, South Korea 2008.

3. Continuity and Reform in Family Policy

We have shown that the post-war Korean family policy was based on a “familialistic” model of welfare provision. The stability of this model is build around three premises: 1) the developmental state spurs

significant economic growth, 2) employers provide well-paying jobs for their male employees, and 3) the gender division of labour and intergenerational reciprocity remain stable within the family.

Challenged by democratisation and economic restructuring, Korea's social policy model has been undergoing major reforms over the past two decades (Peng and Wong 2008). The first major reform was launched in the late 1980s, after the developmental state faced a legitimacy crisis due to intensifying political unrests and eventual transition to political democracy. Another major reform was prompted by the 1997 financial crisis, after which South Korea society began to search for a new model to replace the post-war development model. We will first summarise the latest developments in family policy in Korea (Figure 3.1), and then outline how various areas of family policy has evolved over the years.

3.1. The Latest Developments in Family Policy

A major direction of South Korea's family policy in the 21st century is towards a private-public partnership model in care service provision, both in elderly care and childcare. In 2004, the Presidential Committee on Ageing and Future Society announced measures to expand the role of the government in family affairs. Major goals include reducing the financial burden from childcare and, enhancing both the fertility rate and female economic participation. The details of the policy measures are as follows (Ministry for the Health, Welfare and Family, South Korea 2008):

a) Cash Allowance

- As of 2007, there is **no cash benefit for families** in Korea (OECD Family Data Base 2009). However, the government is currently reviewing whether to provide cash benefits for families with children (Ministry of Ministry for Health, Welfare and Family, South Korea 2009).
- **Child Development Account:** if a child saves a certain amount of money in the Child Development Account, the government saves a matching fund of up to KRW 30,000 per month into the same account. As of May 2008, the Child Development Account was issued to 32,839 children.

b) Child Care Provision

South Korea is among the OECD countries having the lowest enrolment rates of pre-school children (OECD Family Database 2009). As of 2005, 19.9 percent of children under three years old, 59.5 percent of three-year-old children, 66.4 percent of four-year old children and 88.7 percent of five-year old children were enrolled in pre-school facilities. However, the South Korean government has recently promised to increase the level of public expenditure in care provision for children and youngsters as follows (Ministry of Ministry for Health, Welfare and Family, South Korea 2009):

- **The Saessak Plan**, a long-term childcare plan for 2006-2010, is aimed at strengthening the role of the government in childcare. The government plans to double the number of public childcare facilities to accommodate 30% of children committed to child care

facilities by 2010, and increase the number of recipients of the basic childcare subsidy and other cash allowances.

- **The Seromazi Plan** deals with issues stemming from the very low fertility in Korea. Major measures include introducing a basic subsidy for infants, expanding the recipients of the income-related childcare subsidy, loosening the eligibility standards for Free Childcare Service for 5-year olds, and considering the introduction of a Child Allowance.
- **Dream Start programme** aims to provide children in poor families with health care, welfare, education, and culture services in a comprehensive manner and based on their needs. Children under 12 years of age in poor families are eligible for the services. This programme is already operating in 32 areas across the country.
- **After-school programmes** are targeted at children and youngsters of various age groups and include the following:
 - a. **Community Child Centre:** child welfare teachers provide children who need care after school with comprehensive services including tutoring, counseling and meals. Children under 18 years or age are eligible for the service. There are 2,088 Community Child Centres as of 2008.
 - b. **After School Academy for Youth:** talent development programmes, supplementary classes, meals, and counseling are provided. Fourth to sixth grade elementary school students and first to second grade middle school students are eligible for the service. There are 190 of these academies as of 2008.
 - c. **Youth Study Room:** study space and academic support

programmes are provided for juveniles after school. Students aged from 9 to 24 are eligible for the service. There are 344 Youth Study Rooms as of 2008.

c) Leave Arrangements

As of 2007, there are three major types of family leave arrangements in South Korea (OECD Family Database 2009):

- **Maternity Leave:** all employed women are entitled to 15 weeks of full-paid maternity leaves.
- **Paternity Leave:** all employed men are entitled to three days of paternity leave within the first 30 days after the child is born.
- **Parental Leave:** As of 2007, South Korea provides up to 52 weeks of parental leave, with a flat-rate allowance of USD 436 per month. All the leaves have to be taken consecutively.

d) Elderly Care Arrangement

As for elderly care, “long-term care security system for the elderly” was first suggested in a Presidential address in 2001, followed by a series of policy and institutional initiatives that cumulated with the establishment of “The Act of the Long-term Care Security for the Elderly” in 2007. Its official objectives are as follows (Ministry for the Health, Welfare and Family, South Korea 2008):

- Target those who cannot live without others’ aids due to ageing and chronic diseases.
- Provide public services including nursing, bathing and housework, etc.

- Improve seniors' living standard and reduce the burden on their family.

The Act is explicitly targeted at a public-private partnership for financing elderly care (Ministry for the Health, Welfare and Family, South Korea 2008). The Long-Term Care Insurance scheme is managed as an independent account, and the government is responsible for partial payment for the programme costs. The recipient will be responsible for 20 percent of the cost for facility care, or 15 percent of the cost of home care. Exemption and reduction will be made based on the income level.

3.2. Evolution of Korean Family Policy

A major development in Korean family policy is that the government has become more actively involved in family affairs. This can be understood as a remedy for the continuous deterioration of the old patriarchal family model. As democratisation has made the Korean government more generous in the welfare provisions it offers in general, family policy has been developing towards socialising care responsibilities for a fast-ageing, low-fertility Korean population. We turn to an analysis of this policy development.

The Early Post-war Decades

During the early post-war decades, the Korean developmental state sought to limit childbirths, a policy which was common to other East

Asia countries (such as Japan, Singapore and Hong Kong) to complement their industrialisation strategy. Until the mid-1990s, the Korean government actually penalised large families by limiting the child income tax deduction to the first two children, and requiring parents to pay more for each extra child's healthcare bills (Howe et al. 2007). This was also the period when the government took a non-interventionist approach to family affairs, and a residual approach to welfare provision. Up until 1991, publicly financed childcare was restricted to the poor and mothers in need. Over the years, the government basically assumed that the family will take care of its own members.

The 1980s to the Mid-1990s: the Expansion of Social Policy

The 1980s marked an important period for welfare policy development in South Korea as the Chun government launched a series of major initiatives due to intensifying political pressures (Kim 2007). Among these initiatives were the establishment of social insurance systems, expansions in public assistance programmes, and the consolidation of the legal framework for social services for children, the disabled and the elderly.

Still, much of the family policy formulated at this stage followed the traditional cultural norms by placing care responsibilities primarily on family members. A case in point is that government declined to treat childcare as a public responsibility and preferred instead to encourage the community organisations and the business sectors to provide

childcare services for working mothers, despite the fast increasing number of working mothers (Won and Pascall 2004). For example, the enactment of the Infant Education Promotion Act in 1982 promoted the establishment of the “New Village Cooperative” kindergartens, and the Ministry of Labor introduced the “Workplace Childcare System” in 1987 under the Act on the Equal Employment For Both Sexes. The Infant-Child Care Act, aiming at expanding childcare facilities, improving protection and education for children, and supporting economic and social activities of families of children in need of care, wasn’t enacted until 1991 (Choi 2002).

Given the above situation, it is therefore not surprising that there were no government nursing homes for the elderly in South Korea until 1985. Institutional care for the elderly was limited to those with low income until the end of the 1980s because there were no fee-charging homes. In 1989 and 1993, the Elderly Welfare Law was amended to make way for institutional care for middle and upper class elderly who could afford to pay fees (Choi 2002: 78). But home-based elderly care was already showing signs of overburdening the family in the 1980s. Community care service began as a form of home-help service in 1987, initiated by a voluntary organisation on a community basis. Subsequently, from 1987 to 1992, the Korean government provided financial assistance to several elderly welfare agencies that offered home-help and adult day-care services on an experimental basis. Still, in the late 1980s, only 7 percent of the elderly used the home help services, and fewer than 2 percent of them used an adult care centre, short stay care, visiting

nurse, nursing home and elderly hospital (Rhee 1999 as quoted in Choi 2002: 94-95). In 1993, a law was passed to support three types of community care services: home help, adult day-care and short-stay care, but financial support was not significantly increased (Choi 2002:79). All in all, the family had to shoulder care responsibilities for the elderly throughout much of the post-war period.

c) The 1997 Financial Crisis as a Turning Point

During the 1990s, South Korea was still not ready to abandon the “family-head system” because the policy discussion still revolved around “the goal of national development and raising national competitiveness by utilising women’s labour, rather than focusing on the needs of and the benefits of women themselves” (Yang 2002). However, the sharp economic downturn in 1997 compelled the Korean government to launch major reforms in social security schemes and employment programmes. In the same period, widespread poverty among the elderly also pushed the government to increase the old-age allowances. This marked a major shift away from the government’s non-interventionist model with respect to family policy (Kwon 2002). One of the major policy shifts is the acknowledgment that childcare is a joint responsibility between families and society. As a result, the childcare promotion policy has since then been directed to cover both lower-income families and middle-class couples.

Meanwhile, the National Health Insurance (NHI) programme was hit by financial shortfall in face of an increasing demand for long term care,

particularly for the elderly (Cho et al. 2004): as of 2002, only 0.39 percent (or 13,907 people) of the 3.6 million elderly could be accommodated in long-term care beds, causing a large number of chronically disabled elderly being placed in acute care beds in general hospitals. In 2002, NHI expenditures on elder health care increased so that they accounted for more than 20 percent of its overall budget. This became a serious burden on the NHI system because of the longer stays and higher costs of treatment in hospitals compared with care specifically targeting the elderly in long-term care facilities. The NHI system actually saw its financial deficit jump to 2.7 trillion won by the end of 2001, amounting to about one-fifth of total NHI expenditures for the year. The problem is likely to worsen, as the family support system has also been weakening.

d) The 21st Century: Towards a Social Investment State

During the 2000s, South Korea has had numerous policy discussions focusing on the problem of population ageing. The President Committee on Ageing Society and Population Policy published a long-term strategy statement entitled “Vision 2020”, mentioning such measures as raising both the retirement age and the fertility rate. In 2006, it also issued a “five-year ageing plan” that introduced a number of concrete measures including subsidies for families to pay for day care and education, and those for companies to hire or retain older workers (Howe et al. 2007). The Korean government actually became “pronatalist”, encouraging couples to have more children by subsidising childcare and educational costs (Howe et al. 2007).

In 2006, the government also launched the new Elderly Care Insurance programme, which is modelled on Japan's Long-Term Care Insurance system (Howe et al. 2007). The new programme intends to finance both home care and nursing home services for all elders who meet the disability test. The hope is that Koreans' cultural preference for family-based care and the programme's cost-sharing requirements would limit demand for the new long-term care benefits (Howe et al. 2007)

By promoting care service as an industry, the South Korean government is no longer treating childcare and elderly care as welfare provision. Instead, the emphasis is put on a social investment strategy. Under the new family policy which commodifies the previously un-commodified care work, the government intends to achieve two inter-related objectives: 1) freeing women from informal care work to enable their more active participation in the labour market; and 2) spurring economic growth by socialising care provision for children and the elderly (Peng 2009).

4. Family Change and Family Policy in South Korea

Policy reform in South Korea in the past decade is clearly a response to a rapidly ageing population. Under the post-war family policy, the Confucian tendency to protect the traditional family model has put a disproportionate burden on women. However, with an increasing number of women attaining higher education and actively participating

in the labour force, the old family model forced these women into making the hard choice between prioritising work or the family. A major problem is that the total fertility rate has dropped to become the lowest among all OECD countries, further speeding up the population ageing process. With the declining percentage of three-generation households, the increasing demand for elderly care has also become a pressing concern.

The Female Labour Participation is on the Rise amid Economic Growth

In South Korea, economic development has been accompanied by a higher female labour force participation rate, as is the case for many other highly developed economies. Even though South Korea's female labour force participation rate is still a bit below the OECD average (OECD 2009), there is still a significant upward trend from the 1980s onwards (Sung 2003). However, Korea is the only OECD member country in which women with a university level of educational have a lower labour force participation rate than those with a lower educational level (OECD 2009): in 2004, 57 percent of women with a university level of education participated in the labour force compared with 59 percent of women who had completed only high school.

This peculiar pattern can be explained by the male-dominated conception of work and family, which makes it particularly difficult for women to balance their work and family obligations. To begin with the family division of labour, it is clear that women are expected to reconcile paid and unpaid work on their own (Sung 2003). As a result,

there is still a bi-modal pattern in female labour force participation from 1970 to 2000, with the first peak (age 20-24) reflecting a high level of participation before marriage and/or childrearing, and the second peak (age 40-49) representing women's return to employment as their children enter their teens (Won and Pascall: 273).

This is certainly related to the fact that the Korean workplace practices are not very family friendly, e.g., staff are required to work long hours and there is a significant gender wage gap. In particular, the percentage of Korean women working over 40 hours a week (77 percent) is significantly higher than the OECD average (49 percent), and the female median earning is 40 percent of the male median earning (which makes the gender wage gap more than double the OECD average) (OECD 2009). These workplace practices could also be a disincentive for women to enter the workforce.

Traditional Family Values Remain Relatively Strong

Indeed, the Confucian tradition is still a significant force in regulating both the gender division of labour and inter-generational relationships in South Korea. Koreans continue to be under strong moral pressures "to sacrifice their individual interests for unconditional family unity, to keep familial problems within the family and to abstain from resorting to social or governmental measures in an effort to meet familial needs" (Shin and Shaw: 337). In particular, a woman is expected to shoulder the responsibilities for caring for her children, husbands and parents-in-law (Sung 2003).

Even though the influence of the Confucian tradition may have weakened as Korean society develops (Croll 2006), the tradition family values are still relatively strong in Korea, as indicated by a higher-than-average percentage of three-generation households and a strong tendency for inter-generational reciprocity. In contemporary Korea, the percentage of the elderly living in the same households with their grown-up children has remained very high, standing at 65.2 percent in 1988 and 53.2 percent in 1998 (Sung 2003: 351). But since then, the decline of the three-generation household has been speeding up, falling to 44 percent of the elderly living with their children in 2004 (Howe et al. 2004).

Nonetheless, intergenerational reciprocity is still relatively strong and inter-generational support is still very common in Korea. For example, a major strategy working mothers use to balance work and family is to get help from other female members of the family or family-in-laws by living nearby one another (Sung 2003), and inter-generational economic transfers remain significant in contemporary Korea (Eun 2003a). However, problems may arise when family resources are lacking. For example, while the elder generation can in theory help working mothers with childcare, a significant number of working mothers have no one to help with childcare (Sung 2003). In addition, while a majority of the elderly depend on their offspring for economic support, older people constitute a financially underprivileged group in South Korea (Cho et al. 2004).

A Very Low Fertility Rate Makes the Population Age Faster

The South Korean social policy model has long put women in the difficult position of having to make a hard choice between work and family. Despite the increasing number of female workers, neither the government nor companies were too concerned with the pressures on women to balance work-family obligations until alarming socio-demographic developments emerged. Delayed marriage and delayed childbirth can readily be understood as common coping strategies for working women to balance work and family; so is reducing the number of children. While delayed marriage and delayed childbirth are not major social problems in South Korea, the fertility rate of South Korea has been the lowest among OECD countries for a few years (OECD 2008). This in turn speeds up the process of population ageing, fuelling serious public concern in South Korea.

It is commonly recognised in both the Western and Eastern societies that parenthood tends to generate more significant family-work conflicts than marriage (Sung 2003). It is therefore understandable that an increasing number of women try to lessen their burden by reducing the number of their children since homemaking and elderly care responsibilities have yet to be alleviated. This trend can only escalate when full-time work is not only personally desirable but also financially necessary for many low-income families. All in all, family outcomes were becoming so undesirable in South Korea that the government has had to undertake major family policy reform in recent years.

5. Concluding Remarks

Family policy reform in South Korea in the 21st century can be understood as responses to the deterioration of the traditional patriarchal social order. Korean society has long placed women into a secondary position in both the family and in work. However, an increasing number of women are no longer willing or able to bear the disproportionate burden of balancing work and care giving. The continuous low fertility rates clearly illustrates that the old family policy model can no longer work effectively. South Korea is responding by shifting away from a non-interventionist approach towards an explicit policy of promoting childbirth and work-family balance. The developmental state strategy underpins the family policy reform. The government intends for the new family policy, which commodifies the previously un-commodified care work, to achieve two inter-related objectives: 1) freeing women from informal care work to enable their more active participation in the labour market; and 2) spurring economic growth by socialising care provision for children and elderly (Peng 2009). Yet it remains to be seen whether South Korea is as enthusiastic about promoting gender equality (which would bring it closer to the egalitarian model) as preserving the traditional family model by subsidising care work (which brings it closer to the conservative model).

Chapter 4

Taiwan: Torn between the Non-interventionist and the Conservative Family Policy Orientations

Taiwan has undergone state-led industrialisation, followed by democratisation, in the past few decades. Its socio-economic development trajectory shares a lot of similarities with that of Korea and, to a lesser extent, Japan. During the post-war decades until the 1990s, Taiwan could be classified as having a developmental welfare model that lacked a coherent and comprehensive family policy. As in the case of other East Asian developmental states, social policy in Taiwan was subordinated to economic development policy. The Confucian family model is supposed to ensure that all the family members are taken care of, while voluntary organisations are encouraged to assist the more disadvantaged social groups. From the 1990s onwards, much of the social policy reform was made amid the intensification of party competition in electoral politics. Nonetheless, a major breakthrough in family policy did not happen until 2004, when the long-standing opposition political party, now in power, passed a bill on family policy reform. This bill signalled that the government now intends to become more actively involved in family affairs, particularly in financing care services. The most significant policy reforms include the plan for a long-term care financing system, the promotion of a home- and community-based care system, and the promotion of gender equity. Still, it should be noted that Taiwan family policy continues to be

sandwiched between the non-interventionist and the pro-traditional family policy model. This is illustrated by the core idea of the current reform, which is “to support the family rather than to unlimitedly invade or control it” (The Executive Yuan. 2008). Indeed, Taiwan still has a strong orientation towards Confucian tradition, as shown by the relatively resilient patriarchal gender division of labour and the generalised reciprocity between generations.

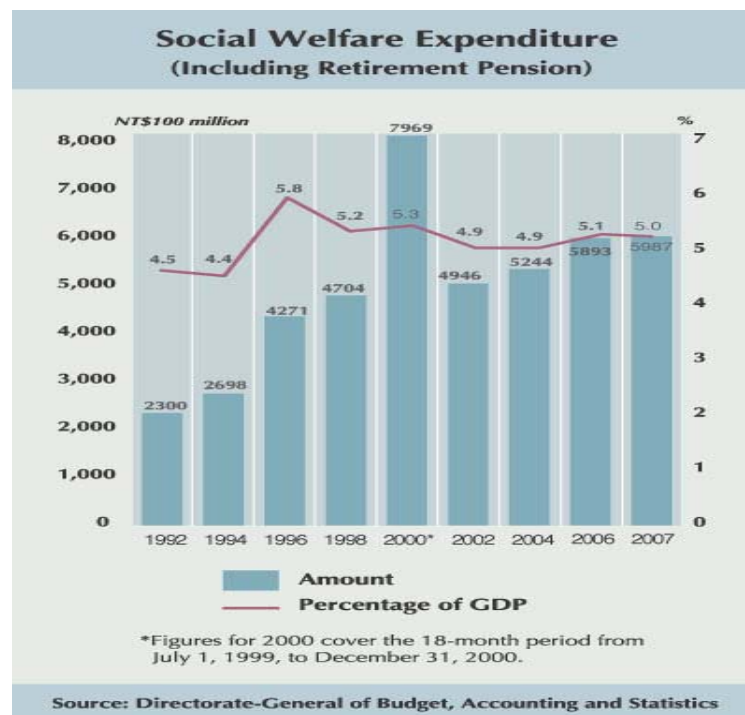
1. The Post-War Family System and its Transformation

Taiwan’s post-war economic growth is another illustrative case of the developmental state (Wade 1990). For decades, the state allocated its resources primarily to promoting economic development while largely neglecting welfare institution development (Tang 2000; Holliday and Wilding 2003). Indeed, we find Taiwan’s family model similar to those of both Japan and Korea: the state assisted business to spur economic growth and create relatively well-paying jobs, while the male-dominated households have been expected to take care of the non-working members of the society. In other words, the sustainability of the East Asian development model not only relies on a strong state, but also hinges on the stability of the traditional family model, which in turn is based on a patriarchal gender division of labour, and a generalised reciprocity between generations. In fact, Taiwan has shown a strong orientation towards familism, as indicated by the relatively high percentage of three-generation households, and the prevalence of male-breadwinner families. Even though the traditional

family model has been rather strongly resistant to change, economic restructuring since the 1980s has led to a series of demographic challenges, and the transition towards democratisation has put the government in a position to expand welfare provision since the 1990s. Entering the 21st century, the Confucian family model has shown signs of weakening, and the government has been extensively reviewing its family policy.

Taiwan, as in the case of Korea, demonstrates that democratisation is a major driving force behind welfare development in East Asia (Aspalter 2001; Ku 2002; Wong 2005). During the early post-war decades, the authoritarian state was keen on promoting economic development. As a result, the whole approach towards welfare policy development during the post-war decades was “piecemeal, reactive and lacking a grand vision” (Tang 2000:78). Welfare policy in the period of authoritarian rule (1945-1987) under the Kuomintang (KMT) was characterised by a conservative/corporatist orientation in that welfare provisions were designed exclusively for the benefit of the ruling elite and other key supporters of the state, such as civil servants, military personnel, teachers and private school employees, and low-ranking district and block officers (Aspalter 2002). A wave of social movements spread in the 1980s, challenging the legitimacy of the government and pushing for reform in social welfare policies. Notable examples include the handicapped welfare movement, the women’s welfare movement, the elderly welfare movement, the children’s and youth welfare movement, and to a lesser degree, the labour movement (Aspalter 2006).

Figure 4.1: Taiwan's Social Welfare Expenditure



Source: Taiwan Government Information Service, Taiwan Yearbook 2008.

Political democratisation throughout the 1980s and the 1990s eventually culminated in a turning point in Taiwan's political economy, marked by the revision of the Constitution in 1997, which laid down the basic legal context for social policy and legislation in Taiwan (Ku 2002). Throughout the 1990s, increased political party electoral competition directly promoted the establishment and the extension of social welfare provisions. In 1997, the issue of an old-age allowance was actively promoted by 42 out of 80 candidates for election to the legislature (Aspalter 2002). The planned introduction of a pension system and provision of unemployment protection in Labour Insurance since 1999 were also the outcome of intensified electoral competition in the later half of the 1990s. During the 1990s, social security as a percentage of

government expenditure rose significantly from 8.2 percent in 1990 to 14.3 percent in 1997 (Ku 2002). Meanwhile, social welfare expenditure increased steadily as a percentage of GDP from the 4.5 percent level in the early 1990s to around 5 percent in recent years (see Figure 4.1).

The much delayed expansion of social welfare in Taiwan should not be attributed solely to the authoritarian state that prioritised economic development over social welfare. We should also highlight the role of the traditional three-generation families in providing welfare for both the children and the elderly. In terms of the work ethic, Taiwan resembles the liberal welfare regime in that the main political parties and most people put a strong emphasis on the principle of self-reliance and thus see it as the responsibility of the family and individuals to support themselves through work. In terms of its welfare policy orientation, Taiwan resembles the conservative welfare regime in that the family is the primary social institution of welfare provision, particularly with respect to care giving for children and the elderly (White and Goodman 1998).

The patriarchal traditional family model is indeed a major pillar of post-war Taiwan society. With the state focusing on economic development, it was left to families to provide social protection for vulnerable groups, and women were doubly burdened as the main providers of cheap labour for industry as well as welfare for their families (Kwon 2005). Even though female labour force participation

is not uncommon, male-dominated households have been prevalent in Taiwan society. The traditional gender division of labour was still evidenced in both the household and the labour market. A common pattern in post-war Taiwan has been that young women work until they get married, and then withdraw from the labour market, give birth to children, and take care of their families. In fact, the percentage of women giving up their jobs after getting married has been high, and so has the time women spend on taking care of their family. Even in 2007, women are still subordinate to men in the household and in the labour market (Directorate General of Budget, Accounting and Statistics 2008).

To recapitulate, while the Taiwanese government has become more responsive to political demands for more social protection and welfare services after the transition from authoritarian rule to democracy, the strength of the traditional family model in Taiwan has served to delay the development of a comprehensive family policy. The issue of welfare reform in Taiwan has become more pressing only in the 21st century, as the public concern over the fast-ageing population intensifies.

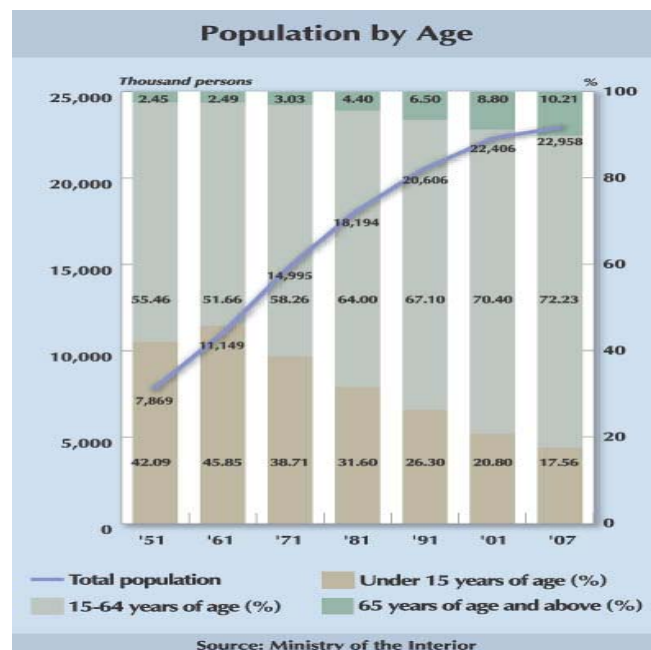
2. The Socio-demographic Challenge to the Post-War Family Model

While Taiwan has experienced demographic changes similar to those of other East Asian societies, its traditional family model is comparatively more resilient in the face of these challenges. In the following, we document some of the major demographic changes that the Taiwan

government regarded as particularly challenging when it reviewed family policy in 2004 (The Executive Yuan 2004):

- Decline in childbirth: Taiwan's birth rates have dropped from 25.64 per 1000 people in 1971 to 22.97 in 1981, 15.70 in 1991, 11.65 in 2001 and 10.06 in 2003. Meanwhile, the total fertility rate has also kept falling from 7.04 in 1951 to 5.59 in 1961, 3.71 in 1971, 2.46 in 1981, 1.72 in 1991, 1.34 in 2002 and 1.24 in 2003 (The Executive Yuan 2004). As of 2007, the fertility rate has dropped to 1.10, one of the lowest such rates among developed economies (Directorate General of Budgets, Accounting and Statistics 2009).

Figure 4.2: Taiwan's Population Structure



Source: Taiwan Yearbook 2008.

- Rapid ageing of the population: the share of the elderly (above 65)

in the population has risen from 3.64 percent in 1966 to 4.41 percent in 1981, 5.28 percent in 1986, 6.53 percent in 1991, 7.86 percent in 1996 and 9.24 percent in 2003. The government has warned that Taiwan is among those societies with the fastest-ageing population worldwide, as the projected time required for the elderly population to rise from 7 percent of the total population to 14 percent would be only 26 years (The Executive Yuan 2004). As of 2007, the elderly account for more than 10 percent of the total population in Taiwan (Figure 4.2).

- Lower marriage rate, delayed marriage and higher divorce rate: the crude divorce rates have risen from 0.36 in 1971 to 0.83 in 1981, 1.38 in 1991, 2.53 in 2001 and 2.87 in 2003, resulting in a higher percentage of single-parent families (The Executive Yuan 2004). Meanwhile, the average age of marriage for men rose from 27.1 years to 32.6 years between 1975 and 2007, while for women it increased from 22.8 years to 29 years during the same period. Meanwhile, the divorce rate rose from 1.1 percent to 2.55 percent between 1985 and 2007 (Taiwan Yearbook 2008).
- Female labour force participation rate is rising: female labour force participation rates in Taiwan have gradually risen from 35.37 percent in 1971 to 38.76 percent in 1981, 44.39 percent in 1991, 46.1 percent in 2001 and 47.14 percent in 2003. Though the percentage is not very high, it is already significant enough to become an issue in home care, family relations, division of labour in household duties, and women's fair treatment in the workplace (The Executive Yuan 2004).

- The percentage of women shouldering housework is very high: According to the government's 1998 "Survey on Taiwan's social development trends", in terms of responsibility for housework, women accounted for 91.2 per cent of the persons in charge while men accounted for only 6.9 percent (quoted in The Executive Yuan 2004). This suggests that the concept of men shouldering housework labour is still not popular. The household duties workload of employed women with partners is also high: according to the government's 2002 "Survey on Taiwan's social development trends", employed women's average household duty work hours per day were 2.46 versus 1.12 for their male counterparts. While employed women's household duty burdens are a lot greater than those of their male counterparts, the issue of how women should balance the dual burdens of work and family has not been effectively addressed (The Executive Yuan 2004).
- Family size is decreasing as the percentage of elderly cohabiting with their children slowly declines: the percentages of the elderly living with their children have fallen from 70.24 percent in 1986 to 67.17 percent in 1993, 64.3 percent in 1996, 67.79 percent in 2000 and 63.40 percent in 2002. This suggests that the need for developing the public care system will grow (The Executive Yuan 2004).
- The percentage of women caring for children by themselves remains high: According to the government's 2003 "Survey on Taiwanese married women's child-rearing and employment", 69.65 percent of the below-3-year-old children are taken care of by their mothers,

22.35 percent by family members, 7.41 percent by babysitters, 0.13 percent by foreign housemaids, and 0.46 percent by day-care centres and others. As far as infant care is concerned, Taiwan's married women still have to rely on themselves or family members (The Executive Yuan 2004).

At first glance, the above-mentioned demographic changes in Taiwan may seem similar to those found in most developed economies. However, Taiwan is different from most other developed economies in that the traditional family relationship remains surprisingly strong in that women still provide a large part of unpaid care work, and both children and the elderly are still commonly taken care of by family members. On the one hand, this suggests that the family in general and working mothers in particular are likely to come under great stress during economic downturns. On the other hand, this shows how the traditional family remains strong under the non-interventionist (or in other words, unsupportive) family policy regime. This resiliency of the traditional family is the main reason why Taiwan lags almost a decade behind Korea in launching major family policy reforms, even though the pace of its democratisation was not far behind that of Korea.

3. Continuity and Change in Family Policy

In light of growing concerns about the declining strength of the family, there was a pressing need from the start of the 21st century for articulation of a more comprehensive family policy (Lin 2002). The Executive Yuan also included the item of "how to perfect family

function and enhance living quality" in the agenda of the third national social welfare conference held in 2002. At that meeting, a resolution was reached as follows: "[b]ased upon the respect for diverse family values, to assess different family needs, to establish a mechanism for integrating family policy groups, a need-oriented family policy should be studied and drafted" (The Executive Yuan 2004). Accordingly, the Executive Yuan has instructed the Ministry of the Interior to invite all related ministries and departments to draw up Taiwan's family policy: "the goals of formulating a family policy are, on the one hand, to maintain the stability of the traditional family and, on the other, to respond to the influences on the family from the aforementioned changes in Taiwan's society, economy, and culture" (The Executive Yuan 2004). Yet again, the new family policy is sandwiched between non-interventionism (that is, avoiding openly intruding into the family) and conservatism (that is, inclining towards the preservation of the traditional family life).

3.1. The Latest Developments in Family Policy

A series of policy discussion in Taiwan eventually culminated in the launch of the Family Policy White Paper in 2008, which sets out policy goals for the next decade. A "Family Policy" report was passed at the eighth meeting of the Social Welfare Promotion Committee of the Executive Yuan (2004) in 2004 that signalled Taiwan's shifting away from a non-interventionist family policy regime. However, the change in Taiwan's family policy is rather modest and reactive when compared to Korea's comprehensive and pro-active approach. Below is a summary of the latest family policy in Taiwan as documented by the Ministry of Interior (2009) unless otherwise cited.

a. Cash Allowances

The education voucher is a universal benefit, while all the other cash allowance schemes are means-tested.

- The education voucher scheme: since 2000, parents of children over five years of age enrolled in registered private preschools can receive a NT\$10,000 yearly. Starting in 2007, parents of children under five may also receive a subsidy for their children's education, covering 138,129 children in 2007. Those with a household income below NT\$600,000 (US\$18,270) are entitled to free nursery service (Taiwan Yearbook 2008).
- Since 2002, subsidies have been given to children under the age of three for the co-payment of medical services covered by Taiwan's National Health Insurance (NHI) programme (Taiwan Yearbook 2008).
- Means-tested cash allowance schemes: in addition to the childcare assistance for low-income families, the Taiwan government initiated several cash allowance schemes, including nursery education voucher (2000), medium-low income childcare assistance (2004), aboriginal childcare assistance (2005), five-year-old childcare assistance (2007), and childcare subsidy for children aged two and under (2008) (Directorate General of Budget, Accounting and Statistics 2009).

b. Leave Arrangements

- There are eight weeks of paid maternity leave, but neither paternity leave nor childcare leave is available for working parents (The Executive Yuan 2008). However, the government is examining the possibility of making the leave arrangement more generous.

c. Child Care Provisions

- The community babysitter support system: the 24 county/municipal governments have created 46 supervisory support systems, and 47,843 individuals have received babysitter licenses between 1998 and 2007.
- Subsidised day-care for children in low-income families: three-year-old children from low-income families who go into public or private day-care centres could receive NT\$12,000 per year; 4,335 such children were subsidised in 2007.
- Establish public and private kindergartens by actively assisting day-care centres to register with the government. By the end of 2007, there were 6,839 registered centres to accommodate 253,084 children.

d. Elderly Care Provisions

- The Senior Citizens Welfare Act was revised in 2007, highlighting “ageing in place” and “holistic care” as well as “continuum care” as the guiding principles in the policy development.
- In 2007, the Executive Yuan has outlined “A Ten-Year Plan for Promoting the Long-term Care System”:
 - It is projected that over ten years, the government will invest NT\$81.7 billion in this programme, which will provide long-term care for the elderly in need of round-the-clock nursing (including citizens aged 65 and over, indigenous citizens aged 55 and over, disabled citizens aged 50 and over, and those elderly living alone and unable to perform everyday tasks) (Taiwan Yearbook 2008).
 - Long term care management centres are to be established by local governments to provide various services including 1) care services

- (specifically home care, day care, adult foster home care services); 2) home nursing; 3) community and home rehabilitation; 4) acquiring or renting of assistance equipment and improvement of barrier-free environments at home; 5) meal services for disabled elders; 6) respite care services; 7) transportation services; and 8) long term care institutional services. Various municipal and city/county governments have already established 1,590 “Community Care Station” locations by 2009.
- As of the end of 2007, 997 publicly and privately funded care centres, which could accommodate around 62,000 people, were providing institutional care services to the elderly.
 - As for cash allowances for the elderly, the government launched a benefit system for the elderly in 2002, granting a monthly allowance of NT\$3,000 to people aged 65 years or older who are of limited means and receive no other pension or stipend. In July 2007, the National Pension Act was passed to broaden the coverage of the existing social security system by covering anyone aged 25 to 65 not yet covered by social insurance. According to the Act, those covered by the insurance programme pay a monthly contribution based on a percentage of the national minimum wage and varying according to age. After retirement, contributors will receive a pension of up to NT\$7,603 per month for the rest of their lives, a figure that will be adjusted in line with changes in the consumer price index.

It should be noted that the Taiwan government is currently reviewing various policy areas relevant to the family, including in-home care services and family support, the formation of caregiving networks for senior citizens, cash allowance schemes, insurance and in-community

care services. It is expected that more new policy measures will be introduced in the next few years.

3.2. Evolution of Taiwan Family Policy

Throughout the post-war period, the development of Taiwan's social policy in general and family policy in particular can be characterised as incremental and reactive. Because individuals are expected to take care of their own family affairs, the government has only intervened selectively into the family. As a result, much of the family policy change is triggered by political change. The Taiwan government was regarded as an authoritarian regime, at least prior to the lifting of martial law in 1987, and social policy in the early post-war decades could be explained by and large as the way the Kuomintang (KMT) sought to establish its political legitimacy (Hill and Hwang 2005). After Lee Ten-Hui became President and launched a series of constitutional reforms in the 1990s, Taiwan underwent the transition towards becoming a democratic polity. As a result, social issues became more important in political debate and social mobilisation (Wong 2005). However, major reform in family policy only happened after the 2000s, after President Chen Sui-bian of the Democratic Progressive Party (DPP) attempted to overturn many of the KMT policy paradigms.

1960s-1970s: the Developmental State Subordinates Family Affairs to Economic Development

As in the cases of the developmental state in Japan and Korea, the KMT government prioritised economic development over welfare provision. Under this development model, the family is largely regarded as a

stabilising force that provides social protection and care services for the people. From the 1950s onwards, the demand for children began to fall along with the process of economic development. Actually, the Taiwan government first intended to influence fertility trends through a strong family planning programme initiated in 1964. While the family planning programme was launched more than a decade after fertility had started dropping, it is clear that government policy measures helped the total fertility rate to fall steadily in the early post-war decades (Lee 2009). Not surprisingly given the power of the authoritarian regime, the government had the capacity to implement policy measures that intervene into family planning. In other words, the non-interventionist family policy orientation of the Taiwan government is largely a result of its reluctance, rather than inability, to intervene into family affairs. Throughout the 1970s to the mid-1980s, the post-war economic development model worked well in Taiwan. Steady economic growth went hand in hand with the prevalence of three-generation households that take care of the non-working family members (Tsai 2007).

1980s-90s: Democratic Transition Leads to a More Responsive Government

During the mid-1980s, population ageing became a matter of both scholarly and public concern. In 1988, the government initiated research to re-assess population goals. Subsequently, in 1992, the government revised the Guideline for Population Policy, modifying the previous goal of reducing population growth to the goal of maintaining a reasonable growth of population. Accompanying this 1992 revision

were policy measures aimed to increase marriage rates (Lee 2009). Lacking concrete and strong measures, the 1992 population policy was ineffective in changing the trend of declining birth rates, marriage rates and population ageing. Actually, it can be seen here that a strong orientation towards familism continued to underpin the whole 1992 policy reform. The assumption was that, by promoting marriage, couples would have more babies, thus slowing the pace of population ageing. All in all, the government still expected families to take care of their members on their own since there was an intention to support families through providing either more finance or services (Lin 2002).

Meanwhile, the lifting of Martial Law in 1987 opened the door for democratisation in Taiwan. Indeed, the Taiwanese administration became more concerned with the welfare of many disadvantaged groups. However, in respect to family policy, Taiwan lagged behind South Korea in launching significant reform. This may be explained partly by the fact that the 1997 Asian Financial Crisis did not hit the Taiwan economy as hard as Korea's (Kwon 2005). However, the delay of Taiwan's family policy reform cannot be understood without taking into account the Confucian ideals that value the three-generation households. Illustrating this point is the fact that the Department of Health only began in 1991 to encourage hospitals to establish nursing homes on a pilot basis. By 1995, there were only 9 such homes with 470 beds in Taiwan. In 1999, there were a reported 101 nursing homes with 4,308 beds registered with the Department of Health, and 123 homes for older people with 7,615 beds registered with the Department of Social Welfare

(Ofstedal et al. 2002: 88). All in all, community-based services with various residential facilities are preferred over institutional care in Taiwan.

2000s: Towards a More Active Family Policy

Following several years of policy discussion, a newly revised Guideline for Population Policy was issued in 2006 to replace the 1992 revision (Lee 2009). There are five stated goals in the policy statement (The Executive Yuan 2004):

1. To safeguard the family's financial security;
2. To promote gender equality;
3. To support the family's care ability and share the family's care responsibility;
4. To prevent, and assist the family in addressing, family members' problems; and
5. To encourage tolerance in society.

Subsequently, the White Paper on Family Policy was launched in 2008 to outline more concrete policy measures (The Executive Yuan 2008). Basically, the White Paper signalled that Taiwan government is ready to launch a comprehensive policy which aims to achieve certain family outcomes. While the policy review is rather all-inclusive, we single out a few major themes as follows:

- a. Recognising the need for “de-familisation” of care work: the new family policy deviates from the assumption that the family is solely responsible for care giving. This is based on the recognition that

there is a general trend that families are finding it increasingly hard to provide adequate care for both children and the elderly. The government is thus prepared to become more involved in supporting families.

- b. Active protection for gender equity: the new family policy also recognises that women are overburdened with family responsibilities, especially when more and more women are expected also to have a paid job. Therefore, a lot of attention was paid to easing the work-family balance on the part of working women in general and working mothers in particular. Maternity leaves were made statutory, and other family-work balance policies are under serious consideration.
- c. Co-financing of care work: the new family policy also recognises that there is a greater role for public financing in care work, particularly for the elderly. Otherwise, elderly care facilities would suffer from either an undersupply or poor quality. Still, the Taiwanese government is leaning towards a system co-payment between the family and the government, as evidenced by the Ten-Year Long-Term Care Plan.

However, we should take note that Taiwan's latest family policy reform still has a strong orientation towards the preservation of the traditional family. Influenced by Confucian values, the public generally prefers a home-based and community-based care system over a formal institutional care system. Another indicator that Taiwan is strongly influenced by Confucian values is the prevailing belief that reciprocal

arrangements between generations should be maintained by family members living in the same household, or at least by family members living in the same neighbourhood (Chen 2008). Also, the Taiwan welfare orientation has yet to shift away from the liberal welfare model, as state finance for care services is usually provided on a means-tested basis. Cash allowance schemes are usually designed with specific target groups in mind, rather than on a universal basis. The underlying assumption is still that the state should only support the livelihood of those unable to make ends meet from the labour market or from the family support system. In sum, while Taiwan has become more active in supporting the family, its policy is still sandwiched between the pro-traditional and the non-interventionist model. There is no denying that the new family policy differs significantly from the previous regime, but it is debatable whether the new government has initiated a paradigm shift in its approach to family policy.

4. Family Policy and Family Change in Taiwan

The Taiwan political economy has experienced three major transformations since the 1950s, namely the developmental state, the democratic transition, and post-industrialisation (Peng and Wong 2008). By taking into account these changes in the historical institutional context, we can better understand family policy changes in Taiwan. During the early post-war decades, the developmental state was keen to promote export-led industrialisation, while the Confucian

three-generation household model provided a stabilising force for the society as a whole. In the meantime, intensifying social movements and the subsequent transition to political democracy resulted in more generous welfare provisions for various disadvantaged social groups, but family policy had yet to be accorded a high priority in the reform agenda. More recently, post-industrialisation puts women in an increasingly difficult position in terms of balancing paid work with unpaid care giving, and therefore, the government has come under increasing pressure to become more supportive of families. However, the Confucian cultural legacy is still a significant factor in explaining the family change and family policy in Taiwan, as evidenced by Taiwan's preference not only for home-based and community-based care systems over formal institutional care systems, but also for financing disadvantaged groups over providing care services directly.

Because state policy has long refrained from intervening into the family (except for the family planning phase), economic change and the cultural values used to be the major structural forces in transforming family relationships. Like the experience in many other developed societies, higher educational attainment and economic development have provided women with more job opportunities. From the recent demographic statistics, it is quite clear that Taiwanese women, especially those who are highly educated, are becoming less inclined to shoulder the double burden of care giving and wage earning. This in turn destabilises the original equilibrium in Taiwan's social system. Two inter-related changes have resulted: 1) Taiwanese men are now

more likely to seek marriage partners from women overseas, many of them from other traditional societies such as Vietnam and China; and 2) more Taiwanese households, especially those that are well-off, hire foreign domestic helpers for homemaking, child care and elderly care (Lin 2002). While these may help ease the pressure from a rapid ageing population, the problems of delayed marriage and lower birth rates remain unresolved, not to mention the fact that the issue of social integration of those immigrants has become another major social problem in Taiwan.

The problem of family-work balance eventually caught the government's attention by the turn of the 21st century (Tsai 2007). While the timing, the direction and the scale of the policy reform can be accounted for by the changes in the political economy, the cultural legacy is an important factor in explaining the continuity of Taiwanese family relationships and family policy. The level of economic development is a powerful explanatory factor for population ageing, as almost all societies have gone through population ageing after rapid economic growth. However, in order to explain the scale and pace of policy responses to population ageing, the political process is more significant than the economic change. While the economic change transforms the gender relations and inter-generational relations, thus providing the social background for policy reform, major policy reform usually comes after a change in political leadership. Nonetheless, the cultural ideals about family relationships also shape the direction of policy reform.

Illustrating this point is that the Taiwan government recently proposed a series of community-based care policies for the elderly, with the main idea being “the local taking care of the local” (Chen 2008: 183). This also indicates how the government intends to design its long-term elderly care service delivery model based on the traditional Confucian value of filial piety. Indeed, the living arrangements of the elderly in Taiwan have yet to be westernised, even though changes are underway: the elderly still receive a lot of social support from their adult children living nearby (Sun and Chang 2006). Therefore, we should take note of the relatively strong continuity in Taiwan’s social policy (Peng and Wong 2008).

5. Concluding Remarks

The development of family policy in Taiwan demonstrates yet another case in which the East Asian developmental model tends to face a set of family outcomes similar to those found in the Conservative Welfare Regime (such as Germany). The societal division of labour is based on the idea that the government promotes economic development and the resulting economic gain is supposed to trickle down to all citizens through their families. In other words, the family bears the primary responsibility of providing welfare for the non-wage-earners (children, housewives and the elderly). Maintaining this system becomes increasingly difficult once economic development falters and when the traditional conception of gender roles is challenged by the modern

education system and feminist ideas. The original equilibrium of the social system tends to be increasingly undermined during the post-industrialisation period when continuous economic growth is associated with more women receiving higher education and actively participating in the labour market. Even though the traditional conception of the gender division of labour may not be openly challenged in the public policy debates, many women are no longer so willing to conform to the cultural norms, resulting in such trends as more women delaying marriages, having fewer children, and/or living apart from the elder generations. In other words, it is increasingly difficult to preserve the traditional family model. What seems more feasible is for the government to assist women in resolving the work-family balance, to encourage men to share the care giving responsibilities, and also to finance care work for both children and the elderly. Those are actually the policy changes that we find in the recent policy reform in Taiwan. However, although Taiwan may have become somewhat more active in promoting childbirth and female labour force participation by financing care services, its welfare policy in general and family policy in particular still shows a strong continuity with the post-war policy model which prefers to rely on the family and the private sector to get things done before the state intervenes. It thus appears that the Taiwan government prefers to make gradual changes to its family policy unless insurmountable problems emerge.

Chapter 5

China: Family Policy Subordinated to the Developmentalist Regime

It is not surprising to find that the Confucian family model remains strong in China, because it is a latecomer, as compared to Japan, Korea and Taiwan, with respect to economic development and political democratisation. Still, China has followed a similar development trajectory, if we focus on the socio-economic development after the 1978 reform, which is widely recognised as a watershed in China's development. Whereas pre-reform China was characterised by a series of Communist social policies, post-reform China has moved closer to the East Asian developmental state. In particular, post-reform China has shown a productivist welfare orientation, that is, social policy is subordinated under an economic development strategy. While there has recently been greater public concern over the problem of population ageing, the Chinese government has yet to comprehensively reform its family policy. Recent family policy initiatives are mostly accommodations to economic reform, with the one-child policy, pension reform and community-based care system during the 2000s being three notable examples. As in the earlier phase of other East Asian developmental states, the family is still the primary welfare institution in China. Hence, the government's involvement in both childcare and elderly care is limited, making its family policy closer to the non-interventionist model in respect of resource allocation, despite the fact that the state has not refrained from population control. However,

there is a strong preference for preserving the traditional family, as demonstrated by the state's inclination to support the community to share the care giving load with the family. All in all, China's family policy development can be understood as being located at the crossroads between the non-interventionist and the conservative models.

1. The Post-War Family System and its Transformation

“Utilitarian Familism” is a useful concept for understanding Chinese society since it indicates that individuals rely on their families and kinship networks for livelihood support (Lau 1984; Wong 1998). Not only did traditional China view the family as the primary institution for welfare provision, even contemporary China relies largely on the family for the care giving function (Jacobs 1975; The Clearinghouse 2005). Only during the Mao era did the Communist regime shift part of the welfare responsibilities from the family to the work unit (Leung 2005). While the Chinese government is more authoritarian than liberal or non-interventionist in its social policy, the state has refrained from intervening too much into the family affairs because the Confucian family model functions well as a stabilising institution. In other words, a strong state and a strong family have combined to bring stability to China during the post-war decades. Since the 1978 reform, the Chinese government has boosted its political legitimacy through the promotion of economic development, and this productivist welfare orientation further subordinated social welfare development to the economic development strategy.

During the early years, the Communist government played a central role in welfare provision for urban workers through the state-owned enterprise (SOE) system. Meanwhile, the family care system remained the most significant welfare institution in rural areas since the welfare system was relatively underdeveloped for rural people (Selden and You 1997). However, this phrase of “defamilisation” was relatively brief, as welfare development in China took a dramatic turn after the 1978 reform with a cutting back of the generous provision for urban workers, particularly during the 1990s (Croll 1999; Liu and Wu 2006). Before the 1978 reform, urban workers enjoyed a full range of welfare services from their work units. In other words, the state-owned enterprises were expected to provide “cradle to grave” coverage for their workers and their families, including lifetime employment, education, healthcare and pension. As for rural farmers, the state did not provide much welfare protection, and thus the family has always been the primary institution responsible for the welfare of rural people. Chinese society has for decades been divided into the urban system and the rural system as a result of the household registration (Hukou) system (The Clearinghouse 2005). However, both the rural and the urban systems actually presume people earn their living by working, though the rural system is even more inclined to leave the social safety nets to the family (Gu and Liang 2000).

After the 1978 reform, and the subsequent state-owned enterprise reform, the old welfare system in urban areas underwent major changes

(Leung 2005). Simply put, there has been welfare state entrenchment from a state-based towards a more market-based provision and finance of welfare services. Meanwhile, the overall state development strategy is to promote economic development, and other social goals are subordinated to it. Still, it would be misleading to classify the post-reform social policy as a non-interventionist model. An illustrative example is the population policy (Liang and Lee 2006), which clearly demonstrates that China is far from following a liberal, non-interventionist family policy model. Rather, it has adopted a selective non-interventionist approach.

Since the market-oriented reform, welfare policy development in China has shared a lot in common with the East Asian development model, that is, economic development strategy absorbs most of the state's resources, and wage earners are expected to take care of other non-working family members (Leung 2005). In other words, the sustainability of the developmental welfare regime hinges on how well the families can take care of their members, and in particular, how well women can fulfil the care-giving role. In other words, the post-reform era saw the state retreating from welfare provision in urban areas, leaving the market and families to find solutions for welfare needs (Shi 2006).

The family has therefore regained its prominence as a welfare providing institution in urban areas, while remaining as the primary welfare provider in rural areas. Indeed, utilitarian familism becomes even more important during the reform era in China, not only as network

forms of economic exchange and coordination, but also in providing a safety net for vulnerable groups. Among the most significant adaptations in the Chinese family system is the “modified extended family” (Chen 2006). This concept refers to the situation that while the three generation households are becoming less common, elderly parents are likely to live in the same neighbourhood with their adult children. It is even expected that grandmothers will take care of their grandchildren, and also that adult children will provide material and emotional support for their elderly parents (Chen 2006). This is in fact also a major coping strategy found among Hong Kong families over the past few decades (Lee 1991).

In sum, China has a similar societal division of labour as in other East Asian societies, in which the state puts primary emphasis on promoting economic development, enterprises are expected to create growing job opportunities for individuals, and the families are supposed to take care of the children and the elderly (Peng and Guo 2000). Therefore, the East Asian developmental states have encountered similar problems. However, China is better served by the Confucian traditions on the one hand, and is less affected by the socio-demographic problems found in the other three societies. Therefore, it is not surprising that China still lags behind the other three societies in terms of formulating a comprehensive family policy. Put another way, China still relies primarily on the family to adjust to the socio-economic transformations because there has not been much state policy intervention.

2. The Socio-demographic Challenges Facing the Chinese Family Model

Socio-demographic changes in post-war China have differed somewhat from the other three cases, largely because of their varying levels of socio-economic development. Still, the following section will show that China is currently undergoing the type of socio-economic transformation as experienced by other East Asian societies two decades ago. The general pattern of change includes a decrease in the average household size, decrease in birth rates, and the speeding up of population ageing. However, Chinese family relationships are more “traditional”, as reflected in a strong marriage institution and a strong reciprocity between generations. In short Chinese society is still strongly integrated by family relationships, which in turn functions as a major source of social stability.

We mentioned above the peculiar pattern in China of a sharp division between rural and urban population as a result of the household registration system. The urban population has been a privileged group in China in terms of welfare provision, whereas the rural population is largely outside the scope of the state welfare programmes. As a result, while we present national demographic changes, we need to take note that there are often significant regional variations. In the following, we document major demographic changes in China by looking at some of the official statistics (National Bureau of Statistics of China 2009):

- Birth rates declining steadily: birth rates have been kept at a

relatively low level throughout the last two decades because of the population planning policy, or the so-called “one-child policy”. In 1970, the birth rate was 33.43 per thousand, and the fertility rate was 5.81. The birth rate remained relatively stable throughout the 1980s, standing at 18.25 in 1978, 18.21 in 1980, 21.04 in 1985, and 21.06 in 1990. Since then the birth rate has been declining gradually, from 19.69 in 1991 to 17.12 in 1995, and 14.64 in 2000 and 12.10 in 2007. Because China’s declining birth rates result from state policy rather than socio-economic changes, China’s birth rates were kept at a low level well before industrialisation took off.

- Population ageing is speeding up: the population is ageing rapidly in recent years, though China has been a relatively “young” country throughout the post-war era. In 1953, the elderly (65 years of age and over) accounted for only 4.41 percent of the population. The percentage stood at 3.56 percent in 1964, 4.91 percent in 1982, 5.57 percent in 1990 and 6.96 in 2000. In 2007, the percentage stood at 9.36 percent. However, the pace of population ageing will speed up rather rapidly because of the low number of childbirths and rising life expectancy. Actually, the ageing population is currently growing by 3.02 million annually (Xinhua News Agency 2006).
- The three-generation household is increasingly difficult to sustain in the face of modernisation: As of 2005, households with three-generation or more accounted for less than 18 percent of all households in China. It is a common trend for co-residence of elderly parents with their adult to decline as urbanisation and industrialisation advance (Peng and Guo 2000). In China, the

living arrangements of the elderly were relatively stable during the 1980s (Zeng 2007). In the 1990s, signs already emerged that co-residence of older adults with their adult children had already declined, though the level was still relatively high as compared to other Western countries (Zimmer et al. 2007). In 2007, one-, two- and three-person households combined accounted for 63.7 percent of all households in China, whereas only 15.4 percent households consisted of five or more persons. Though nuclear families have become more common, we need to take note of the modified extended family, which we discussed in the previous section.

- Marriage is still almost universal in China, even though divorce is also becoming more common: as of 2007, 73.8 percent of those aged above 15 are married, whereas only 1.1 percent are divorced. As of 2005, the average age of marriage was 25.86 for males and 23.49 for females. This basically shows that marriage is still a very strong tradition in China, even though divorce is becoming less of a taboo (Xu et al. 2007).
- Female labour force participation rate is high, but women are still the primary homemakers: even though China is constrained by the Confucian values, it is also affected by socialist ideology. As a result, women have long enjoyed relatively equal statutory rights at work. Throughout the 2000s, the female labour force participation rate has been consistently high, standing at 79.3 percent in 2000, 77.9 percent in 2004 and 77.1 percent in 2007 (The World Bank GenderStats 2009). However, in 2000, in over 85 percent of the households, women were still primarily responsible for the

housework, and spent on average more than two hours per day in housework than men did (Department of Population, Social, Science and Technology 2004).

In sum, the Chinese family still demonstrates Confucian values in the following respects. First, marriage and family are still a major part of almost every individual's life course, as evidenced by the relatively early age of marriage and low percentage of unmarried adults. Second, inter-generational reciprocity is still strong. The younger generations show a strong sense of filial piety towards the elder generations, and the elder generations also provide care services for their adult children and/or grandchildren. Third, the patriarchal gender division of labour remains constraining, which explains why Chinese women seem to be less resistant to shouldering the double burden of being a wage-earner and home-maker. Nevertheless, the Confucian features of the family system may weaken in the foreseeable future, if the experience of other East Asian societies is relevant.

3. Continuity and Change in Family Policy

The Chinese government has yet to formulate a comprehensive family policy, with the notable exception being the population planning policy since the early 1980s. As the one-child policy is the kind of intrusive policy that affects the decision to have children, China's family policy can hardly be classified as following the non-interventionist model. Our analysis is that the Chinese government refrains from formulating a

more comprehensive family policy as long as family outcomes are not disruptive to other developmental goals of the state, such as economic development and social harmony. Put in another way, the traditional Confucian family model is complementary with the state development strategy because it functions well enough as a welfare institution, particularly in the rural areas. Therefore, we characterise China's family policy as a mix between the non-interventionist and the pro-traditional models by default. In respect of supporting the family, the government emphasises the centrality of paid work, and therefore both employment creation and retirement protection are placed higher in the policy agenda than social assistance programmes, family allowances and parental leave arrangements. It is against this backdrop that China's family policy is somewhat underdeveloped and fragmented as compared to the other three East Asian societies. We will report the latest developments in China's family policy, and then analyse its continuity and change over the years.

3.1. The Latest Developments in Family Policy

China's family policy still revolves around the residual welfare conception that individuals should secure their livelihood by work. Thus, many of the recent social policy initiatives are mostly either targeted at expanding the social security coverage of workers (such as pension reform), or designed as social investment projects (such as healthcare, housing and education reforms). Hence, it is not too surprising that family policy initiatives are somewhat lacking in China.

We provide more details in the following:

a. Cash Allowances

No universal cash allowance is available for families with children, though the establishment of the minimum living allowance is already on the policy agenda. Various cash allowance schemes are offered on a means-tested basis, aiming to support disadvantaged groups who are not supported by their families (such as the elderly, orphans and the disabled).

b. Leave Arrangements

- *Maternity Leave* is statutory in China. Female employees should get a childbirth allowance for 90 days according to law (State Council 2004). However, we should take note that there are variations among enterprises and provinces in the actual implementation of the law. The official goal is to achieve at least 90-percent coverage of maternity insurance for urban workers before 2010 (Department of Population, Social, Science and Technology 2004)
- *Parental Leave* and *Childcare Leave* have yet to become statutory in China.

c. Childcare Provision

Public support for childcare is limited because family members still assume the responsibility of taking care of their own children. The State Council usually delineates national guidelines for early childhood

care and education, and gives the local governments the autonomy to develop, operate and deliver the services (Zhai and Gao 2008). The “Chinese Children Development Programme 2001-2010” stated that one of the major objectives is to “make sure that school-age children from big and medium-sized cities and from economically developed areas basically received three years of pre-school education and a fairly high increase in the rate of rural children receiving one year pre-school education” (State Council 2000). As of 2003, about 20 percent of all children aged six and younger were enrolled in various types of kindergartens (The Clearing House 2005). As of 2004, in Shanghai, more than 95 percent of children aged three to six were enrolled in kindergarten (Li 2006). The state also relies on either the enterprise or the family to finance childcare services as China is inclined to follow the “Socialist Market” approach in financing early childcare and education (Corter et al. 2006). Even though there is an increasing supply of community-based childcare services, families are required to pay for the services (Zhai and Gao 2008).

d. Elderly Care Arrangements

Not only is there a strong Chinese tradition that adult children are responsible for supporting their parents, Chinese law also makes it clear that children are obliged to support their aged parents by meeting any reasonable requests from them (China National Committee on Ageing 2009). Even though elderly care is becoming one of the major issues in the state’s welfare policy development, the government still declines to be the major finance provider for elderly care services. Instead, the

state adopts a community-based approach by mobilising families, communities and welfare organisations to finance and provide services for elderly care.

- Home-based and community-based care systems are prioritised over institutional care for the elderly. Starting from the “Starlight Plan – National Community Welfare Service for Elderly People” in 2001, the government has designed its community welfare services as supplementary support for home-based elderly care. There were more than 32,000 elderly community service centres in 2004 (The State Council 2004), whereas there were less than 8 beds for every 1,000 elderly people in 2006 (The State Council 2006).
- An experimental scheme entitled “residence support for the aged” is aimed at bringing families, communities and welfare organisations together for long-term elderly care (China National Committee on Ageing 2009). Three alternatives are being discussed: 1) the elderly loan their spare houses to welfare organisations and receive their living expenses in return; 2) the elderly entrust their house to welfare organisations in return for long-term care services; and 3) the elderly sell their house to welfare organisations, get paid a lump sum, and continue to live in their house by paying nominal rent.

In sum, the Chinese government still sees welfare services as residual. First, it declines direct service provision and universal financing for welfare services. Second, the state prefers to leave it to the market and the family to meet welfare needs. Third, the state tends to intervene only when people cannot take care of themselves. Because the state

does not actively promote a series of desirable family outcomes, it is not surprising to see an underdeveloped and fragmented family policy in China.

3.2. Evolution of China's Family Policy

The underdevelopment of family policy in China can be attributed to the fact that, when the economy is still growing relatively robustly, the developmental state tends to subordinate welfare development to its economic development strategy. From this vantage point, China's family policy can be characterised as selectively interventionist rather than non-interventionist because the authoritarian state actually has the capacity to intervene into the family when it sees fit. A notable example of this selective interventionist approach to family affairs is the so-called one-child policy, which has been in place for more than 25 years. In other words, the relatively limited scope and scale of family policy in China thus far can be interpreted as a consequence of the fact that the Chinese family has been functioning effectively as a stabilising influence to the society as a whole. In analysing the evolution of China's family policy, we even see that the government actually expects the family to assist the state more than the other way around.

Defamilisation in the Pre-1978 Communist Welfare system

During the early communist rule, work units basically replaced family as the most fundamental welfare system provider. In the early years after 1949, state- and collectively-owned enterprises were established to

nationalise almost the entire industrial economy in Socialist China. In 1951 the Communist government introduced Regulations on Labour Insurance, providing the framework for the provision of various benefits based on the principle of lifetime employment and association with a state-owned enterprise. Although the benefits were in theory provided for employees of state-owned enterprises and collectively-owned enterprises, they were applicable to nearly all urban workers including government employees and those in related sectors such as education and healthcare. Nevertheless, they did not cover the majority of the workforce in China, that is, the rural peasants. Under the scheme, male workers became eligible for a pension at 60 years of age after 25 years of continuous employment, while the qualifying age for female workers was either 50 or 55 after 20 years of continuous employment. The pension was typically 50 to 70 percent of the standard wage depending on the number of years in employment (Salditt 2007).

However, the state pension system collapsed during the Cultural Revolution. After that, the labour insurance pension scheme was not re-established and individual SOEs continued to be solely responsible for pension provision and other benefits including health and housing. In 1978, the government amended the retirement component of the Labour Insurance Regulations. The major goal was to provide incentives for older workers to retire earlier in order to create more job opportunities for young workers who returned to the cities after being sent to the rural areas during the Cultural Revolution. In addition, the 1978 amendments formalised the practice of enterprises having to bear

full responsibility for all of the labour insurance benefits due to their employees (Salditt 2007).

The Post-1978 Era: The State Transfers Much of the Burden for Welfare to Market and Family

After the 1978 reform, the social welfare system in China underwent major changes as the Chinese government introduced a series of welfare policy changes which shifted the responsibility from the state to the communities, enterprises and families (Xu and Jones 2004). The emerging social welfare system has shifted towards a public-private hybrid, and a major driving force behind this is the reform of the state-owned enterprises. While individuals have become more reliant on their employment for their livelihood, vulnerable groups such as the children, the elderly and the disabled have few options but to turn to their family for support (Shi 2006).

Financing issues in the case of pensions became more pressing during the 1980s as the number of pensioners nearly doubled in the year after the 1978 amendment, and expenditure increased almost 19 times between 1978 and 1988 (Salditt 2007). In 1986, another amendment was introduced requiring all new SOE employees to make contributions of up to 3 percent of their basic wages, along with employer contributions of 15 percent of the enterprise's pre-tax wages bill. Contributions were paid into collective funds operated by newly established Social Insurance Agencies (SIA). In 1991, the pension system took another turn, signalled by the State Council Resolution on

the Reform of the Pension System for Enterprise Workers. Basically, a three-tier system was developed: 1) a basic pension for all retirees jointly financed by the state, enterprises and the workers; 2) a supplementary scheme funded by the enterprise from its trading surplus; and 3) an account funded by individual workers, on a voluntary basis, and payable as a lump sum. However, the 1991 Resolution laid down guidelines rather than binding directives (Salditt 2009). Therefore, there remained significant variations among provinces.

During the 1990s, the government also attempted to broaden the coverage by introducing pension schemes for the rural population, initially on an experimental basis. In January 1991, under the “Basic Plan for Old Age Social Insurance in the Countryside” the State Council decided to develop old-age social insurance in rural areas and designated the Ministry of Civil Affairs to be responsible for the project. Meanwhile, the expansion of the market economy and rapid urbanisation in the 1990s was accompanied by the growth of a new type of urban poverty related to lay-offs and unemployment as well as to large-scale rural-urban migration. This was different from the previous period when urban poverty mainly consisted of the “Three Nos” (no relatives or dependants, no working capacity and no source of income) (Liu and Wu 2006).

Amid a series of economic and social reforms, the Chinese government started to pay attention to the provision of early childhood care and education during the 1990s (Li 2006). The Kindergarten Management

Legislation was made public in 1990 by the Ministry of Education. Under this legislation, education commissions across the country should provide publicly run, and encourage independently managed, facilities (i.e. by enterprises and/or community-based groups). Also, in 1996, the Ministry of Education issued legislation that instructs kindergartens run by enterprises and the military to extend their services beyond their workers' children by opening their programmes to other local children (Li 2006).

The 2000s: Towards a Community-Based Support System

There were widespread concerns over SOE lay-offs in China during the early 2000s. While pension reform and social security became major issues, there were also policy initiatives to develop the community-based welfare organisations. The intention was that the local community should become more resourceful in supporting disadvantaged groups (Xu and Jones 2004). At this stage, the state still refrained from directly supporting individuals through cash allowance schemes, indicating a strong orientation towards the work ethic of self-reliance.

An illustrative example of the community-based approach is that the administration and operation of early childhood education and care programmes have relied mainly on local governments (Zhai and Gao 2008). Only during the early Communist era did the government actively promote public childcare, and thus the number of children enrolled in kindergarten almost tripled from 130,000 in 1949 to 380,000

in 1951 (Zhai and Gao 2008: 131). Still, by 1957, only one million children, about 1.4 percent of all preschool-age children, were enrolled in kindergartens, which were largely concentrated in the coastal provinces (Zhai and Gao 2008: 131). However, the development of childcare facilities stalled during the 1960s and 1970s due to the social and political instabilities. Even after the 1978 reform, the overall enrolment rate of childcare facilities has remained relatively low throughout the years, although rising: the enrolment rate among children aged six and under was 8.3 percent in 1982, 12.7 percent in 1990, 18.8 percent 1995 and 21.9 percent in 2000 (Zhai and Gao 2008: 134).

Meanwhile, the state is actively promoting the development of community-based and home care industry. Indeed, China's home care industry already generates about 9.8 billion yuan annually, and is expected to grow to 18.5 billion yuan by 2010 (AARP 2009). Because of the influence of the Confucian teaching of filial piety, Chinese still hesitate to place their parents in long-term care institutions. Home-base care is regarded as more appropriate, and a lot of the government's recent initiatives are intended to strengthen community support for home care (Xu and Jones 2004). Community centres have therefore become a major infrastructure of service delivery in urban China (Xu et al. 2005).

In sum, the state basically refrains from formalising care services. Instead, the family continues to take on the primary responsibility, while the community-based welfare organisations perform a secondary role.

This demonstrates that the Chinese government has been adopting an incremental and residual approach in its family policy formation. All in all, while the government relies on the traditional family, it does not put a lot of resources into supporting it.

4. Family Policy and Family Change in China

The strength and resilience of the traditional Chinese family may explain why the state has not been pro-active in family policy reform. At first glance, China appears to share family orientation similar to the non-interventionist family policy model. However, a closer look shows that the Chinese government has not actually refrained from intervening into the family. Quite the contrary, the government has intruded into family when it sees fit, the notable example being the one-child policy. One reason why the Chinese government has not intervened more extensively into the family could be that the Confucianist family functions well as a stabilising institution for society. As long as the family is doing its part, the state has little incentive or is under little pressures to change the status quo. This is especially the case when social protests and political opposition have not developed to the point where they are strong enough to effectively challenge the central government. All in all, much of the family change in China in the post-war period can be understood as uncoordinated adaptation by individual families and their members. In analysing these family changes, we can see how Confucian families adapt to rapid social change without the help from state policy.

Despite rapid modernisation in recent decades, Confucian family values remain relatively strong in China. Post-reform China has been following the development trajectory of many other East Asian societies in that economic development has led to a higher percentage of dual-earner families and nuclear families (which is also the case in many Western countries). However, the traditional Chinese family relationships have been adapting to modernisation relatively well. First of all, while traditional extended families are no longer the norm, family solidarity is still strong in new family forms such as the so-called neo-extended family, or the modified extended family, or stem family. In other words, while elderly parents and their married children may not live in the same household, it is very common for them to provide mutual support by living in the same neighbourhood. This resilience of the Confucian family despite rapid modernisation may explain why Chinese society remains relatively stable. Not only did the Confucian family lessen the need for a publicly financed social safety net, it also helped delay discussions about introducing a public care service system. Indeed, many of the more vulnerable groups have relied on care from their family members.

In addition, the gender division of labour, particularly in the household, also has remained relatively harmonious. In other words, Confucian values still function as a strong moral force and bind family relations together. In particular, women are not very resistant to the double burden of paid work and unpaid housework, nor do adult children seek to avoid personal responsibility for taking care of their parents. On the

upside, Chinese society has shown relatively strong family solidarity, in the form of mutual support both materially and emotionally. But the downside is that the working family members (particularly working mothers) tend to be overstretched as population ageing speeds up, and the financial need for both parents to work in a family becomes more pressing.

While cultural forces may still bind family members together, it is not inconceivable that more and more of the younger generations, particularly highly-educated working women, will become less willing to, or less capable of, fulfilling all their family responsibilities. With the family resources being drained by the decreased household size, undesirable family outcomes are more likely to emerge and force the government to intervene. Currently, the three-person household already accounts for the highest percentage of all households, followed by two-person households. In other words, a large number of elderly parents tend to be not living in the same households with their married children. Because of the one-child policy, there is now a favourable ratio between care giving grandparents and grandchildren. However, in the foreseeable future, demand for long-term elderly care may not be as easily met by the family support system as most couples have only one child.

Whereas the Confucian family is complementary with the developmental state strategy, it is reasonable to expect that the Chinese state can delay but not ignore welfare development. First, a common

development pattern in East Asian societies (and in Western societies as well) is that welfare policy was expanded after economic development had reached a certain level. Second, the Communist party has strong ideological grounds for becoming more involved in taking care of the disadvantaged groups in the society. Actually, the Chinese state has in recent years become more active in reforming the public healthcare system, social assistance and pension programmes, and even public housing policy. The delay in launching a comprehensive family policy may be a result of the Chinese state seeing no urging need to do so. Nevertheless, the issue of population ageing is becoming more serious so that we can expect the state to first become more active in reformulating its elderly care policy.

5. Concluding Remarks

To understand China's family policy reform, we need to take into consideration the 1978 reform. Before the 1978 reform, the state was more interventionist, and had attempted several times to promote "defamilisation" through empowering the work units. After the 1978 reform, China followed in the footsteps of the East Asian developmental state and put its primary emphasis on promoting industrialisation. Social welfare needs were assumed to be fulfilled as an increasing number of people benefited from economic growth through paid work. From the experience of the other East Asian cases, the developmental state tends not to reform its welfare institutions until economic growth hits a bottleneck and social protests are in full swing.

From this vantage point, China is still at an earlier stage of the developmental state in which political legitimacy is sustained through a consistently high economic growth rate. Yet, the Chinese government has already followed the pathways of Japan and Korea (and to a lesser extent Taiwan) in expanding the coverage of social security and medical care as the export-led industrialisation strategy has gradually given way to the consumption-driven one. Comparatively speaking, China lags behind the other three East Asian societies in welfare policy development, in terms of coverage and generosity. However, China still enjoys a higher state autonomy and capacity as policy reform is less influenced by the political opposition. In a way China now resembles what Japan experienced in the 1970s, and Korea and Taiwan in the 1980s, when family policy orientation tended to be less interventionist, care provision residual, and policy reform incremental. At this stage, not only are the Confucian families still assumed to be responsible for their own welfare needs, they also fit into China's overall state building strategy. In sum, major family policy reforms in China have yet to occur, though there are signs that the Chinese government is more inclined towards adopting the pro-traditional model.

Chapter 6

Conclusion and Policy Discussion

In this concluding chapter, we will first discuss the extent to which the four East Asian societies are converging towards the Confucian family policy model, and then outline the factors that contribute to the policy choices in these societies. Finally, we will outline our policy recommendations based on the findings from this comparative analysis.

1. The East Asian Family Policy Model

The East Asian family policy model is a mix between the non-interventionist and the conservative model. Family policies in this region tend to be non-interventionist as long as the Confucian family model is functioning effectively as a stabilising institution for the society. However, the East Asian developmental states also are inclined to retain the traditional family support system. Therefore, when the Confucian family model is challenged by socio-economic changes, East Asian governments tend to take a pro-traditional approach in their family policy reform. Still, their non-interventionist orientation remains strong, since those governments tend to provide limited financial support and means-tested coverage.

1.1. The Confucian Family Model Remains Relatively Strong

The four cases covered are commonly classified as developmental states, as political legitimacy is mostly maintained by the government's ability

to create decent jobs and promote rapid economic growth. Therefore, the provision of welfare institutions is typically underdeveloped during their industrialisation phase. This is exactly where the Confucian family model fits in with the developmental state because the family constitutes the primary welfare institution by taking care of non-working family members.

There are two particularly important features that account for the relative durability of the Confucian family model throughout the post-war era:

- a. Filial Piety (Xiao): this refers to the Confucian teaching that it is a moral obligation for individuals to take care of their elderly parents. Not surprisingly, these East Asian societies consistently report a higher percentage of three-generation households than are found in most Western societies. Even when the nuclear family becomes a norm in these societies, modified extended families are still commonly found as a modern adaptation of the Confucian ideal.
- b. The patriarchal division of labour: probably because of the cultural legacy, East Asian women tend to be more receptive to the patriarchal gender division of labour. Not only are they less resistant to taking the homemaker role in a male-breadwinner family (as in the case of Japan for many years), but in many cases, they also seem willing to bear the double burden as wage earners and homemakers. We should also take note that the Confucian family model also helps working women achieve work-life balance. As in the case of China, it is common for grandparents to take care of their grandchildren.

Thus, the strength of the Confucian family model is a major reason why the East Asian states have not felt much pressure to formulate a comprehensive family policy.

1.2. The Confucian Family is Increasingly Challenged by Economic Change

However, both the East Asian developmental state and the Confucian family model have come under growing pressure to change because of a series of socio-demographic challenges. Among the most significant challenges is the need for economic restructuring amid economic globalisation. Simply put, as a result of economic restructuring towards a post-industrial economy, highly-educated women are in great demand to fill service jobs. This weakens the foundation of the Confucian family model in two major ways: 1) women who become more “Westernised” and individualised are less receptive to the patriarchal gender division of labour; and 2) women who take on a more significant role in the job market are less willing and/or able to shoulder the double burden of being wage earners and care givers.

Indeed, these East Asian societies (with the exception of China) all see changes to their socio-demographic structure as having undesirable consequences. Among the most pressing problems are the fast pace of population ageing, a very low fertility rate, a low marriage rate, and an increasing demand for long-term elderly care. We see these developments as indicators of the weakening of the Confucian family

model in two major aspects: 1) more women are unable to strike a satisfactory balance between work and the family, thus they are delaying marriage and giving birth to fewer children; 2) more families are unable to earn enough to support the elderly. In other words, the East Asian governments are facing a series of undesirable family outcomes, which in turn generate political pressure for policy reform.

1.3. The Developmental Welfare Model under Intensifying Political Pressure

As it is increasingly difficult for the Confucian family to be the primary welfare providing institution, the developmental state tends to face intensifying political pressure to reform social policy. It is no longer valid to assume that the benefits of overall economic development will trickle down to almost all citizens through family networks. As a result, the social movements and political opposition tend to emerge and spread as disadvantaged groups learn how to fight for their own interests through collective action. This is a pattern that we find in the East Asian developmental model, particularly when economic growth slows down. Welfare reform in general and family policy reform usually come after an economic slowdown and/or political struggle.

In sum, the East Asian welfare system relies heavily on two premises: first, the Confucian family model which is based on the patriarchal gender division of labour and the generalised reciprocity between generations; and second, the economic growth model which provides an increasing number of decently paid jobs and promotion opportunities.

The state can achieve political legitimacy and social stability as long as these two premises work in a mutually reinforcing way. Nevertheless, the East Asian experience shows precisely that welfare development becomes a pressing issue when the Confucian family model declines in strength, and/or the economic growth model hits a bottleneck. Therefore, although the timing of family policy reform differs among East Asian societies, we can still say that there exists an East Asian family policy model. In general, these East Asian countries follow a non-interventionist family policy model when the political legitimacy is high, economic growth is robust, and the family support network is strong.

2. Understanding the Family Policy Choice

We will move on to discuss why there is a common direction in East Asia concerning the choice of family policy amid changes in the broader political-economic contexts. Put simply, changes in the political economy are driving the East Asian family policy to move away from the non-interventionist approach, whereas the Confucian cultural legacy is pulling policy reform towards the Pro-traditional model.

2.1. Shifting away from Non-interventionism

Family policy in East Asia tends to remain closer to the non-interventionist model as long as the Confucian family model is stable, economic growth is robust and political legitimacy is high. However, these three conditions are not easy to sustain. In East Asia,

family policy is actually moving away from non-interventionism, though the scale and scope of intervention vary a lot among these four societies.

First of all, the Confucian family is supposed to take care of the elderly. That is why the elderly care system had been underdevelopment in East Asia. However, as we have discussed earlier, an increasing number of families have had difficulties taking care of the elderly. In the meantime, the public healthcare system has become overloaded with the increasing demand for long-term elderly care. As a result, these East Asian societies have encountered one or more of these social problems: 1) the over-utilisation of the hospital care system; 2) the undersupply of institutional elderly care; 3) an increasing number of elderly living alone; 4) an increasing number of elderly living in poverty.

Second, the economic growth model has changed to the point where female labour force participation and dual-earner families are increasingly taken for granted. This is why more women have had difficulty in balancing work and family. Not only are women less likely to be involved in elderly care provision, they are also more likely to delay marriage and to have fewer (or even no) children. As a result, these East Asian societies have encountered one or more of these social problems: 1) the decline of the marriage institution; and 2) a fertility rate way below the replacement rate.

Finally, political opposition and social movements critical of

government policies have grown in strength to the point that welfare policy reform is needed. Not only do these East Asian societies find rapid economic growth and employment creation increasingly difficult to achieve, they are also turning to welfare expansion as a way to boost their political legitimacy. Actually, these societies have witnessed significant expansion of welfare provision in one way or another, including pensions, healthcare, social assistance, housing and so on. Comparatively speaking, social policy reforms are larger in scale and wider in scope in Japan, South Korea and Taiwan than in China. This demonstrates the effects of the strength of political opposition and the level of political democratisation in accounting for the scale and scope of social policy reform in general and family policy reform in particular.

2.2. Moving towards a Pro-traditional Approach

The influence of Confucian values is significant in explaining the new family policy orientation in line with the pro-traditional approach. Whereas East Asian family policy cannot be simply classified as non-interventionist, the family policy reform still revolves around the assumption that the state only supports the livelihood of those who cannot make ends meet from the labour market or from the family support system. More often than not, the state still refrains from providing universal family benefits and long leave arrangements for parents, but rather selectively supports families to perform their functions. Notable examples include childcare assistance for low-income families, early childhood education vouchers, child development accounts, community-based childcare systems,

after-school community centres, and long-term home-based elderly care system. All these schemes are commonly designed to assist the family to provide their caregiving functions. After all, family is still regarded as the primary institution for caregiving and therefore home-based and community-based care provision systems are prioritised over the institutional care system.

2.3. A Mixture between the Non-interventionist and the Pro-traditional Model

Our conclusion is that the East Asian family policy model is developing into a mixture between the non-interventionist and pro-traditional approach. There are three major characteristics of this East Asian Model:

a) A Work-centred Welfare Approach

The East Asian family policy model is still based on the idea that individuals should support their own families by paid work. Accordingly, the East Asian family policy is not generous in terms of leave arrangements, as evidenced in relatively short maternal leave and the absence of childcare leave. Also, almost all cash allowance programmes are means tested, again demonstrating the strong orientation towards the work ethic of self-reliance in East Asia. Accordingly, new initiatives focus on the expansion of public support for both childcare and elderly care, as the overall approach is to support wage earners to balance work and family obligations.

b) A Public-Private Co-financing Model

The East Asian family policy model is still influenced by non-interventionism because the state refrains from fully financing or directly providing care services for the family. Not only are most of the cash allowance schemes means-tested, the East Asian governments are also more inclined to draw upon private resources in financing the new initiatives. A notable example is the co-financing system for the long-term elderly care reform in Japan, which is followed by South Korea. Thus, East Asian family policy still avoids heavy public subsidies for care services, again demonstrating that the East Asian policy model is still sandwiched between the non-interventionist and the pro-traditional model.

c) A Comprehensive Social Care System

A final characteristic of the East Asian family policy model is the inclination towards using community organisations and social networks in supporting home-based care. Because of the pro-traditional orientation that family is the ideal place for care giving, East Asian family policy declines to establish a comprehensive institutional care system. Instead, new initiatives are designed to support home-based care with a variety of community support services, such as day care service for the elderly, after-school childcare programme, and community-based part-time helpers. On the one hand, these community-based care services help sustain the cultural ideal that the children and the elderly are being supported at home. On the other hand, these new initiatives facilitate the modified extended family by

providing a comprehensive support network in the neighbourhood.

In sum, we see the convergence of the four societies towards an East Asian family policy model, even though the timing, the scale and the pace of policy reform are different due to variations in their socio-economic contexts. The Confucian legacy helps explain the overall policy shift from the non-interventionist towards the pro-traditional model, and the level of economic development is a key factor in affecting the timing of policy change, while the change in the political system is more associated with the scale and pace of policy reform.

3. Policy Recommendations for Hong Kong

Even though Hong Kong does not share all the characteristics of the four East Asian developmental states, it does share a lot in common with them in terms of developmental trajectory and socio-demographic changes. Therefore, the family policy discussion in Hong Kong certainly can benefit from the experience of the four societies.

3.1. Sketching the Hong Kong Socio-political Context

The Hong Kong policy context is closer to the liberal welfare regime than the other four East Asian cases. In Hong Kong, market and family remain two major social institutions, and the state is expected to play a relatively smaller role. Accordingly, Hong Kong is also closer to the Non-interventionist family policy model since values such as

self-reliance and voluntarism also apply to Hong Kong. Nevertheless, we cannot ignore that Hong Kong is also influenced by traditional Chinese ethics such as filial piety. The inclination towards preservation of the traditional family is still strong (especially inter-generational reciprocity), although gender equality is also gaining more support. Therefore, Hong Kong can also be classified as a mixture between the non-interventionist and the pro-traditional family policy model.

Hong Kong is also experiencing the same challenges of family change facing most East Asian countries. While gender equality is improving, marriage and family are both weakening as social institutions, and the fertility rate is very low. Among socio-demographic changes the decline of fertility rate stands out the most (Census and Statistics Department 2007a:3-6): the annual number of live births in Hong Kong dropped steadily from 86,751 in 1981 to 68,281 in 1991, and hit bottom in 2003 at 46,965. There has been a moderate increase in recent years, with 65,626 live births recorded in 2006. The total fertility rate is very low, dropping from 1.933 in 1981 to 0.901 in 2003 and then rebounding slightly to 0.984 in 2006. In the meantime, population ageing has also been causing public concern for quite some time.

Another major demographic trend is delayed marriage (Census and Statistics Department 2007b: p.12): the median age of women marrying for the first time was 28.2 in 2006, an increase of about 4 years from 23.9 in 1981. Men have traditionally married at older ages than

women; the median age at first marriage for men in 2006 was 31.2, an increase of about 4 years from 27.0 from 1981. However, a more significant trend is the increasing prevalence of spinsterhood among women: the percentage of never married women in the age group 40-44 reached 16 percent in 2006, a sharp increase from 3 percent in 1981 (Census and Statistics Department 2007a: p.9). In sum, Hong Kong is experiencing socio-demographic challenges similar to those experienced in Japan and South Korea, and to a lesser extent, Taiwan and China. Therefore, policy reforms in those countries would be particularly relevant for Hong Kong.

Based on our findings in this study, we propose the following ideas that hopefully would contribute to further deliberations on family policies in Hong Kong. It is important to note that our recommendations do not suggest that Hong Kong government is ignorant or deficient in these aspects. In fact, even without a rigorous analysis of the Hong Kong family policy, there are grounds for believing that the Hong Kong government is moving in these directions. Indeed, in the 2006-07 Policy Address the Chief Executive put a strong emphasis on “cherishing the family” (p.13). The recent efforts of the Family Council further demonstrate that Hong Kong will strive towards developing a robust and well coordinated family policy.

3.2. Ideas for Moving Family Policy Forward in Hong Kong

We propose the following recommendations for the further development of family policies in Hong Kong:

1. Examine the Stress Level of Various Family Types

In order to enhance policy effectiveness, the government should further examine how various family forms encounter different types of difficulties. The traditional family policy often presupposes a typical “family form”, that is, the two-parent family established through marriage. However, with a larger number of families not organised according to the two-parent family model, the new family policy should recognise and accommodate their different needs. For example, dual-earner, lone-parent and cohabitating families are becoming more common in recent years. Though official statistics for cohabitation are not available in Hong Kong, the number of single parents increased from 34,538 in 1991 to 58,460 in 2001, an annual growth rate of 5.4 percent over the period (Census and Statistics Department 2004: 3).

It would also be useful to examine whether the modified extended families are still resourceful enough in face of intensifying pressure. A major lesson learned from the four East Asian cases is that while the modified extended family is an effective adaptation to rapid industrialisation, this family model tends to weaken when the economy undergoes a further transition towards the post-industrial, service-based economy. This is largely because women are expected to play a bigger part as wage earners in a post-industrial economy. In other words, women tend to encounter greater difficulty in striking the balance between work and family. As a result, more women delay marriage and childbirth, and they have fewer children.

To avoid demographic changes moving in an undesirable direction, we need to further examine the types of difficulties that various family forms encounter and then formulated policy measures for various target groups. As there are so many different family forms, it is highly unlikely that a “one size fits all” policy design would be very effective.

2. Help Citizens to Achieve Work-Family Balance

Hong Kong should accommodate citizen’s needs to achieve a satisfactory work-family balance. With an increasing number of dual-earner families and an increasing number of lone-parent families, there is an increasing pressure particularly on women to juggle the conflicts between the need to work and childcare responsibilities, not to mention elderly care obligations. With a higher female labour force participation rate, the lack of a work-family balance policy is directly related to the declining number of childbirths. In this aspect, Hong Kong shows a pattern similar to that found in other East Asian societies, namely that highly-educated women are less likely to marry than women with a relatively low level of education. In Hong Kong, while the percentage of never married women in the age group 35-39 with only primary education or below decreased from 1.2 percent in 1981 to 0.8 percent in 2006, those with secondary and post-secondary education grew significantly from 2.4 percent and 1.0 percent to 12.5 percent and 9 percent respectively.

Though helping women to resolve work-family conflicts may not reverse the overall trend of delayed marriage, it probably will make marriage and childrearing less burdensome for women. Therefore, Hong Kong should consider following the general policy direction in other East Asian societies where childcare and elderly care are both being transformed from a solely private responsibility towards a public-private partnership. Prolonging parental leaves, providing care subsidies and extending public care services should be the appropriate policy measures to be pursued in Hong Kong.

3. Build a More Comprehensive Caregiving Support System

Hong Kong has already launched a community-based childcare support system. We would suggest that the government also examine the feasibility of building a community-based elderly care system. An important lesson to be learnt in East Asia is that it is becoming less feasible to place the elderly care responsibility solely on the family. In particular, the experience in Japan was that the much delayed expansion of elderly care services placed enormous pressure on the family, which led to an unintended consequence of an exceptionally high length of hospitalisation of the elderly. A major problem in that case was that alternatives were limited to a stark choice between the family providing home care or institutional if family care was not available. A common policy reform in other East Asian societies is the establishment of a comprehensive caregiving support system that provides families with a wide range of options and a lot of flexibility. In addition to

institutional care, a variety of community-based home care services are provided depending on the health condition and the need for care of the elderly, such as home help, home-visiting nurses and day-care services.

Even though it is part of the Confucian tradition that adult children are morally obligated to take care of their elderly parents, we should take note that it may become increasingly difficult for elderly care responsibilities to fall entirely on the shoulders of their adult children. Socio-demographic developments, such as dual-earner families, smaller household size and fewer children per couple, make public support for elderly care more pressing. While the expansion of the institutional care system may not be the best option, the Hong Kong government should find it valuable to learn from the experience of elderly care policy reform in other East Asian societies. Indeed, all four East Asian governments have been emphasising the neighbourhood-level caregiving support system. While the cultural ideal of home-based elderly care system is still strong, a comprehensive caregiving support system can make life easier for many families.

4. Taking a Social Investment Approach in Care Service Reform

While care service has long been regarded as a welfare provision, we should not underestimate its potential as a revenue-generating and employment-creation industry. Of particular relevance is the recent reform in South Korea where social welfare expansion policies serve not only as family-friendly social policies but also as family-friendly

economic policies. Under this Social Investment State model, social services are designated as a potential growth engine for the new economy because the expansion of social care services can spur the growth of both private-for-profit enterprises in tandem with non-profit organisations. While the availability of social care services facilitates career advancement for more educated women, the development of social care services as an industry also provides less educated women with some decent employment opportunities.

The Chief Executive has in fact already identified medical services as one of the six industries with good medium- and long-term economic growth prospects. The development of childcare and elderly care services could be complementary to this economic development strategy. Indeed, the Hong Kong government has had some success in stimulating the elderly care industry. A notable example is that the Social Welfare Department has purchased places from private homes for the elderly under the “Enhanced Bought Place Scheme” since 1998. This created a win-win situation as this has increased the supply of subsidised places, reduced elders’ waiting time for subsidised care-and-attention places, and also upgraded the quality of services in private elderly residential facilities.

5. Attempting a Private-Public Partnership for Family Policy

To launch new policy initiatives often requires new financial resources, yet it is not suggested that the government shoulder all the financing

responsibility. Instead, it is more feasible to muster a resource pool through private-public partnerships. One option that Hong Kong might usefully examine is whether it is feasible to learn from the Japanese experience of building a private-public co-financing long-term care insurance system. This will not only provide financial resources for elderly care reform, it will also alleviate the financial burden of the public healthcare system. In addition, the government may want to consider putting more effort into persuading private enterprise to adopt family-friendly employment practices. Actually, accommodating work-family balance has been increasingly regarded as a major aspect of corporate social responsibility. Even in Hong Kong, some leading enterprises have already launched such measures as paternity leave for working fathers and flexible working hours. Last but not least, a major form of private-public partnership is to make use of community resources to support families. In addition to encouraging existing voluntary organisations to support families, it would also be fruitful to promote new social enterprises that provide family and childcare services in the neighbourhood.

In conclusion, while the Hong Kong government has been adopting effective policy measures for helping families, we believe there are also some valuable lessons to be learnt from the four East Asian societies.

The End

Glossary

詞彙

Birth rate

A statistical measure representing the number of births in a population per year, usually calculated in terms of the number of births per 1,000 persons.

出生率

這個人口統計常用指標，計算方法是當年每一千人中的新生人口數目

Conservative welfare regime

A concept describing a specific arrangement of welfare provision in which family plays a central role in providing social services to its members.

保守主義福利體制

此福利體制的特徵是以家庭為整個社會的主要福利供給制度

Death rate

A statistical measure representing the number of deaths in a population per year, usually calculated in terms of the number of deaths per 1,000 persons.

死亡率

這個人口統計常用指標，計算方法是當年每一千人中的死亡人口數目

De-commodification

A concept used to describe the degree to which welfare services are free of the market. In a largely de-commodified welfare system, services such as education, healthcare and childcare are provided to all and are not linked to market processes. In a commodified system, such services are treated as commodities to be sold on the market like other goods and services.

去商品化

此概念用以描述社會服務有幾大程度以脫離市場買賣進行。例如：一個高度“去商品化”的福利制度，提供接近免費的教育，醫療，托兒等服務，至於一個低度“去商品化”的福利制度中，市民就要以市場價格購買這些服務。

De-familisation

A concept used to describe the extent to which state policy facilitates individual autonomy and economic independence from the family, particularly for female.

去家庭化

此概念用以描述政府政策有幾大程度，令到公民（特別是以女性來說）在家庭以外得到個人自主和經濟獨立。

Developmental state

A concept used to describe the type of state that has autonomy and capacity to intervene into the direction and pace of economic development, particularly relevant in understanding East Asian development during the later half of the 20th century.

發展型國家

此概念用以描述一種獨特的國家模式，政府具有高度得自主以為強大的執政能力，以干預當地經濟發展的方向和步伐，常被用以代表二次大戰以後東亞國家的經濟發展模式。

Divorce rate

A statistical measure representing the number of divorce in a population per year, usually calculated in terms of the number of divorce per 1,000 persons.

離婚率

這個人口統計常用指標，計算方法是當年每一千人中的離婚人數。

Extended family

A family group consisting of close relatives extending beyond a couple and their children living either within the same household or in a close and continuous relationship with one another

擴大家庭

這種家庭形式的組成人員，包括父母和未成年子女之外的親戚，如祖父母，叔伯等。

Familism

A concept describing the type of social order in which the household is assigned the maximum of welfare obligations.

家庭主義

此概念用以描述一種社會秩序，當中家庭有責任照顧各個成員。

Female labour market participation rate

A statistical measure representing the share of female population working or seeking work, usually calculated in terms of the percentage of women aged between 16-64 working or seeking work

女性勞動參與率

這個人口統計常用指標，計算方法是年齡介乎 16 歲至 64 歲女性當中，在職和求職女性的百份比。

Filial piety

A major virtue in Chinese culture, influenced by the Confucian ideals that individuals should show respect for their parents and ancestors

孝

傳統中國價值，特指受儒家思想影響下，子女對父母和祖先尊敬。

Legitimacy

A particular political order gains legitimacy if most of the governed recognise it as just and valid.

政權認受性

政權是否有認受性，取決於公民對施政的公正和有效是否認同。

Liberal welfare regime

A concept describing a specific arrangement of welfare provision in which the market plays a central role in providing social services to its members.

自由主義福利體制

此福利體制的特徵是以市場為整個社會的主要福利供給制度。

Male breadwinner model

A concept describing, until recently in many industrialised societies, the traditional role of the man in providing for the family through employment

男性養家者模式

此家庭分工方式以男性出外工作養家，女性打理家務，是早期工業社會的常見模式。

outside the home.

Marriage rate

A statistical measure representing the number of marriage in a population per year, usually calculated in terms of the number of marriage per 1,000 persons.

結婚率

這個人口統計常用指標，計算方法是當年每一千人中的結婚人數。

Maternity leave

The period of time that a new mother takes off from work following the birth of her baby.

女士產假

此有薪假期安排，專為初生母親而設。

Means-tested benefits

Welfare services that are available only to citizens who meet certain criteria based not only on need but on levels of income and savings.

資產審查津貼

政府對部份經資產審查合格的市民提供津貼。

Modified extended family

A concept referring to the type of family that the elderly parents live in the same neighbourhood with their adult children and provide material and emotional support for one another.

改良型擴大家庭

這種家庭形式指父母和成年子女雖有不同居所，卻依然保持互相照顧的關係。

Non-interventionist family policy model

A concept describing the type of family policy in which the government believes in the value of family self-sufficiency and assists only those families in need.

不干預主義家庭政策模式

此家庭政策模式的特徵，是政府傾向大部份家庭自給自足，只向少部份有特別困難的家需要庭提供政策支援。

Nuclear family

A family group consisting of mother, father and dependent children.

核心家庭

這種家庭形式由父母和未成年子女組成。

Parental leave

The period of time that a father and/or a mother takes off from work to care for a child or make arrangements for the child's welfare.

父母育兒假期

此有薪假期安排，專為有年幼子女的父母而設，方便他們彈性安排時間以照顧子女。

Paternity leave

The period of time that a new father takes off from work following the birth of his baby.

男士產假

此有薪假期安排，專為初生父親而設。

Patriarchy

A concept describing the dominance of men over women in various aspects of social life.

父權主義

此概念用以描述男尊女卑的社會生活安排。

Population ageing

A shift in the distribution of a society's population towards greater ages, associated with an increase in the population's median age, a decline in the percentage of the younger population, and/or a rise in the percentage of the elderly population

人口老化

一個社會的人口趨向高齡化，一般拍人口的平均年齡增加，年青人口的比例下降，老年人口的比例上升。

Post-industrialisation

A concept describing the processes of social change beyond the industrial

後工業化

此概念用以描述在工業社會之後得一種社會形態，資訊業和服務業

order. A post-industrial society is based on the production of information and services rather than material goods. 逐漸取代製造業。

Productivist welfare (system)

A concept describing the type of social policy in East Asia that is designed as an instrument for facilitating economic development rather than protecting citizens from social risks and poverty.

生產主導的福利（制度）

此概念用以描述東亞地區的社會政策模式，以經濟發展優先於社會保障。

Pro-egalitarian family policy model

A concept describing the type of family policy in which promoting greater gender equity is the main objective.

平等主義家庭政策模式

此家庭政策模式的特徵，是政府以提高兩性平等為主要政策目標。

Pro-natalist family policy model

A concept describing the type of family policy in which low fertility is the main concern and promoting childrearing is the main objective.

提倡生育家庭政策模式

此家庭政策模式的特徵，是政府以提高生育意願為主要政策目標。

Pro-traditional family policy model

A concept describing the type of family policy in which preservation of the traditional family relationship is the main objective.

保留傳統家庭政策模式

此家庭政策模式的特徵，是政府以保留傳統家庭關係為主要政策目標。

Residual(ist) welfare

A notion of social welfare seeing state assistance as temporary, minimal, requiring evidence of need, and available only after all other sources of

補底式福利

將社會福利看成是非經常性和迫不得已的措施，只支援小數有明顯經濟困難的公民。

help have been exhausted.

Social democratic welfare regime

A concept describing a specific arrangement of welfare provision in which the state plays a central role in providing social services to its members.

社會民主主義福利體制

此福利體制的特徵，是以政府為全民提供社會福利。

Social movement

A large grouping of people who have become involved in seeking to accomplish, or block, a process of social change.

社會運動

相當數目的公民組織起來，以集體行動的方式，爭取他們的社會目標。

Total fertility rate

A statistical measure representing the average number of live-born children produced by a woman of child-bearing age in a particular society.

總生育率

這人口統計常用指標，是指每個女性在育齡期間的平均生育子女數目。

Welfare (state) regime

A concept referring to the way in which welfare production is allocated between state, market and households.

福利（國家）體制

此概念用以描述社會福利責任如何在政府，市場和家庭三者之間分配。

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