

BURDEN OF CARE:

AGEING IN URBAN CHINA AND
JAPAN

GENDER, THE FAMILY AND
THE STATE

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A thesis submitted in total fulfilment of the requirements of the degree of
Master of Philosophy

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Australian Catholic University
3 November 2002

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Declaration

This dissertation contains no material published elsewhere or extracted in whole or in part from a dissertation by which I have qualified for or been awarded another degree or diploma.

No other person's work has been used without due acknowledgement in the main text of the dissertation.

The dissertation has not been submitted for the award of any degree or diploma in any other tertiary institution.

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ABSTRACT

This thesis examines how rapid demographic, social and economic changes are impacting on traditional care for the urban aged in China and Japan as both experience world record rates of ageing caused by greater longevity and lower birth rates.

The challenge for their governments is to foster active contribution by the healthy aged to society and protection for the frail aged. China lags behind Japan in special treatment for senior citizens.

The manner in which these two countries handle the ageing of their populations could provide valuable lessons for Australia in the future.

CHAPTER ONE: INTRODUCTION

In this thesis I examine the position of the urban aged in China and Japan and the actions the governments and societies of these nations are taking to meet the needs created by their rapidly ageing populations. I have chosen to focus on the urban aged in my study for two key reasons that highlight several major differences between the two countries. Firstly, most of the aged in Japan, as in other developed countries, live in urban areas along with most of the population (OECD, 2000b). As urbanisation spreads, attention is being increasingly focused on the effect of ageing there. Secondly, although provisions for the aged are uniform across Japan, they vary greatly between the cities and the countryside in China, making it difficult to include both in a study of this size. While Chinese urban dwellers have received cradle to grave benefits from their state employers since the 1950s, the Chinese government is only now extending broader coverage to rural areas (Chow, 2000; Tang, K, 2001).

In this chapter I first give a general introduction to the situation of the elderly in China and Japan. Their position is neither presently as rosy as it is envisaged to be by many Westerners, nor is it set to be as gloomy in the future as deemed by some members of these societies. While most ageing parents continue to reside with one of their children in both these cultures, the practice is predicted to continue declining over the next few decades, resulting in more senior citizens living on their own.

In the following section on demographics I outline the rapid changes of population composition that are placing China and Japan at the global forefront in population ageing. These changes are a result of the combination of greater longevity and historically low birth rates. Economic and social pressures are forcing East Asian governments to accelerate policy reforms to accommodate the needs of their projected greater percentage of aged citizens over the next few decades. This section is followed by brief synopses of the development of health, welfare and ageing policy over the last 50 years in the two countries, showing how they have followed different paths. As my thesis will show, they are converging toward more similar models, albeit from different directions due to their different economic and political backgrounds. I conclude this chapter with an overall view of the family and the aged.

Chapter two looks at problems involved with comparative studies generally and then the particular ones posed by China and Japan. It goes on to summarise areas where policy makers in East Asia are drawing on models from other parts of the world for the development of their own measures to deal with ageing populations. Both nations are quite open to adapting ideas from the West. Japan has done so since the Meiji Restoration in 1868 while China has been actively doing so since the era of reform and opening up to the outside world that started in the late 1970s.

Chapters three, four, five, six and seven cover carers, employment, pensions and retirement, medical care and housing as these are crucial areas that must be addressed by social welfare and health policy to ensure both social stability and secure lifestyles for the aged. All are focuses for social workers. They do not form an inclusive list.

I have chosen to research this topic within a school of social work for several reasons. The first derives from the fact that my academic background includes degrees in both East Asian studies and social work and I would hope in this study to link the two. The

second springs from my time in Japan, Hong Kong, Taiwan and China from 1979 to 1994. When I first arrived in Japan in 1979 I had been working as a social worker in Australia, so I described myself as a 'shakai jigyo-sha' (the common translation for 'social worker'). However, I felt there was a gap between my understanding of the profession and that of the Japanese who I met. The topic of social work in the region has remained an interest for me since then. In addition, through several relationships I developed with older people in both Japan and then China, who I compared with their counterparts in Australia, I have followed the special social welfare situation of the aged in East Asia and the way that the policies of governments and the actions of their families can both augment and hinder positive outcomes for the aged.

Definitions vary for the age limits for the 'aged' as do the terms used to designate them. In this thesis I use the words 'elderly' and 'aged' interchangeably with 'senior citizens' and 'older persons'. Phillips (2000) notes, however, that many older people prefer the latter two terms to the first two words because the stereotyping and stigmatising aspects of language sometimes make the former two demeaning. The general age benchmark I employ for the start of old age is 65 but since many statistics referring to aged persons start at 60 in both China and Japan, where 60 has been seen as marking the commencement of old age under the traditional Chinese calendar (Ishikawa & Maeda, 2000), the terms can also refer to people in the 60 to 65 age group.

Most studies of the ageing of the populations of China and Japan describe the sharp rise in older people as a problem, seeing the potential dependency drain on the economy as the crucial aspect of the phenomenon. It is a rare study that notes greater longevity is a blessing or that acknowledges that, since the majority of the aged are healthy and active, they can make a positive contribution to society (Ohbuchi, 1997). These doomsayers ignore the fact that it is only in the category of 'oldest old', generally meaning 75 and over, that state health expenditure rises markedly (Campbell & Ikegami, 1998).

The common Western image of the aged in East Asia is an idealistic and static one that does not take into account social changes in an era of the impact of the forces of globalisation and greater mass longevity. It conjures up visions of elderly Chinese and Japanese parents blessed with devoted family attention fostered by Confucian ideals of filial piety. The assumption is added that, thanks to this care, the elderly are not a drain on the financial resources of the state, unlike their counterparts in the West. Various Japanese and Chinese writers criticise this simplistic equation of a monolithic East Asian culture moulded by Confucianism for failing to acknowledge the complexity of the region's cultural heritage (Uzuhashi, 2001; Liu, 2000c; Chen, 1996). Ramesh (2000) notes that rigid adherents to the Confucian school fall into an analytical trap as East Asia is too diverse to lend itself to easy generalisation.

A rose-coloured glasses view is as unreal as the common Asian perception that the elderly in Western countries must be lonely and neglected by their children because they have separate residences. While Japanese pity Swedish elderly parents because they live alone, Swedes pity the Japanese because they live with aged parents (Kurube & Higuchi, 1999). In addition, the idealistic concept of traditional family centred care is sometimes used for ideological purposes to create 'a certain image of an "oriental system" that may have little connection with ground-level reality' (Goodman & Peng,

1996:192). Some Western researchers have been questioning these long-held assumptions. For example, Long and Harris (2000) note that taking filial piety to be a determinant of who provides care appears to be an anachronism in contemporary Japan.

While a high percentage of Chinese and Japanese elders continue to live with children who consider it a duty to care for their parents, rapid demographic, economic and social change threaten the widespread long-term sustainability of this tradition. Low birth rates and high longevity rates are altering the family and workplace structures that have to date sustained this custom. In addition, governments are worried that public finances will not stretch to accommodate the future needs of the aged as their numbers balloon out. They are thus trying to encourage the continuation of family care alongside state provisions while also acknowledging that such care will not suffice on its own as family sizes drop.

No-one can predict with certainty what the future holds for East Asia per se, let alone for the ranks of its older citizens. Referring to the American China watchers of the mid 20th century who did not foresee the rise of the communist regime, Jackson says, 'those who attempt to predict the future of China are all too often proven wrong' (Jackson, 2000: 14). The future of Japan is likewise hard to pin down. The failure in the 1980s to foresee that the then booming Japanese economy would fail and fall into recession in the 1990s shows how analytical bases for future policy can lack credibility (OECD, 1998b). Predictions in the 1980s that Japan would soon achieve a GNP superior to that of the United States (Lee, 1987) subsequently proved false in the 1990s.

Planning aimed at ensuring a secure old age for the present generations of young and middle-aged Chinese and Japanese could prove ineffective as social changes emerge and major shifts occur. The social welfare systems devised by Western nations in the first half of the 20th century faltered in the second half partly due to their failure to anticipate, and thus accommodate, many later social trends (Walker, 1983). These trends included the mass entry of women into the work force and the substantial increase in the post-retirement population with the rise in longevity. Early pension planners never envisaged that the majority of citizens would live long enough to claim their pensions for several decades of life, turning pensioners into a major drain on state and corporate resources.

Policy makers in China and Japan have been examining models to deal with the shifts in family structures and employment patterns that are presently impacting on the security of the aged in their societies. Japan remains well ahead of China both in terms of special public provisions for the elderly and also for the populace as a whole, having possessed universal health care and pension systems since 1961 and age specific benefits for around four decades (Miyatake, 2000). China has offered these provisions to urban dwellers since the 1950s but is only now moving to extend their coverage to the countryside where the bulk of its people live (Tang, 2001).

Similar socioeconomic and demographic factors in both nations are placing pressure on traditional family patterns of care for the aged. One is rural to urban migration in the wake of industrialisation. This is further advanced in Japan where 78 per cent of the population are urban (Jones, 2000). It has, however, increased more markedly in

China in recent times with urban dwellers up to 36 per cent of the population in the 2000 national census, an increase of 9.8 per cent over the previous 1990 census (Cartier, 2001). Policies aimed at speeding up the process of urbanisation should raise the rate to over 40 per cent (Liu, 2001). The proposed lifting of previous restrictions on movement between the countryside and cities to enable the rural unemployed to fill urban jobs, announced toward the end of 2001, could accelerate it even further.

Other factors influencing traditional family patterns of care for the aged encompass the continuing rise in longevity that has swelled the ranks of the aged to record proportions; a decline in the number of children available to care for parents as birthrates remain low, and shifts in cultural attitudes created by social change. Marked differences in the extent of female participation in the paid work force in China and Japan have affected the capacity of women to serve as principal carers for the aged within the family. Recent shifts in labour rates in both countries have had opposite effects. More Japanese women are staying in the work force after marriage rather than becoming full-time housewives (Kumazawa, 2000; Ochiai, 1994). Although full-time work has been the norm for Chinese women, an increasing number now face discrimination and redundancy as job security crumbles (Honig & Hershatter, 1988). Thus the participation rate of older women is falling.

THE DEMOGRAPHICS OF AGEING IN CHINA AND JAPAN

China and Japan have experienced spectacular demographic changes over the last 50 years. These changes look set to accelerate and transform their societies even further in the coming 50 years. The current composition of their aged populations can be said to be a direct consequence of broad government health policies that have raised the general levels of health of all their citizens and also of dramatic falls in birth rates. In the immediate post World War II period the widespread implementation of public health regimes eradicated endemic diseases and lowered infant mortality in both countries. This was followed by significant increases in average life spans, with health care made relatively cheap by both the Chinese and Japanese governments.

China's death rates began to fall in the 1950s while birth rates started to slide in the 1970s (Yuan, 1999). Both began to go down in Japan in the 1950s following a baby boom at the end of the 1940s. Urban birth rates in both China and Japan have fallen to below replacement rates while there is no end in sight yet to the steady rise of the percentage of the population above 65. Neither country can afford to be complacent about how these changes will impact on their societies and social planning. The fact that their populations are ageing at a much faster speed than elsewhere in the world has put the spotlight on both nations. Miyahara (1997) says the problem lies not in the aged making up more of the populace but the pace at which ageing is happening.

The United Nations defines ageing societies as having seven per cent of the population aged 65 or over while those with 14 per cent of their populations over that age are aged societies (Miyatake, 2000). Using this standard, Japan is an aged society already while the Chinese population overall is on the verge of becoming an ageing one, as the overall 65-plus age group stood at 6.96 per cent in the 2000 census (Cartier, 2001). Many Chinese cities have already attained that level. Some such as Shanghai and Beijing are already at aged society levels. Shanghai has the nation's

highest percentage of aged with 18.29 per cent of the city's population of 13 million over 60 (Xu, 2001). Beijing's aged population stood at 8.4 per cent in the 2000 census (China.org.cn, 2001). Japan moved from being an ageing society to an aged one in 24 years, a world record time (Miyatake, 2000) while China is predicted to take 34 years to do so (World Bank, 1997b). These figures contrast sharply with those for the many Western countries that are aged societies, most of which took from 40 to 70 years to go through a similar transition (Jones, 2000).

Although in 1985 Japan became the last of the industrialised nations to reach 10 per cent for its aged population, it looks set to be the first to have the aged comprise 20 per cent of the populace. This has been predicted to occur in 2007 (Ogawa, 1998). A year earlier the nation's population is expected to peak at 127.74 million according to the National Institute of Population and Social Security Research (*Nikkei Weekly*, 4 February 2002). The total population will start to decline significantly as the postwar baby boomers born between 1947 and 1949 begin to reach retirement age. Taxes and social security payments could then amount to 45 per cent of pay for the working population if no great changes are made (Ogawa, 1996).

In 2001 Japan remained the most rapidly ageing nation in the world and possessed the longest-lived people. Japanese women were credited with world record longevity for the 16th year in a row in that year (*Nikkei Weekly*, 13 August 2001). In the 2000 census 17.5 per cent of the population were 65 and older, a figure second globally to Italy with 18.2 per cent (*Japan Times*, 30 June 2001). Japanese can now assume they can live to 80. Men can expect to live for 20.99 years after the present retirement age of 60 while women can expect to live another 26.37 years past that age according to one official report (Miyatake, 2000). In 2000, average life expectancy in Japan was 84.62 years for women and 77.64 years for men (*Asahi.com*, 6 August 2001). The Ministry of Health, Labour and Welfare has said that life expectancy could grow by 8.02 years for women and 8.721 years for men if cancer, cerebral haemorrhage and heart disease were eliminated (*Nikkei Weekly*, 13 August 2001).

The number of Japanese centenarians first broke the 15,000 mark in 2001. It was also the 31st straight year in a row that a new record was set for them (*Nikkei Weekly*, 15 October 2001). The 2001 figure for citizens past the century mark was about 101 times greater than the 1963 one. Women made up 83.6 per cent of the 2001 centenarian group and have accounted for above 80 per cent of them over the past decade (*Daily Yomiuri*, 12 September 2001).

In 1997 65-year-olds in Japan exceeded children under 15 for the first time, making up 16 per cent of the total population (*Asahi Shimbun*, 25 May 1998). By the year 2020, one in four of the population is predicted to be over 65 (Ogawa, 1996). There are now more Japanese households with elderly family members than with children and teenagers. China remains well behind Japan in this regard but is heading in the same direction. A reversal to the Chinese government one-child policy to allow more children could affect this demographic, however. The 2000 national China census revealed a decrease in the under 15 group of 4.8 per cent to 22.89 per cent of the population compared to the previous 1990 census. The percentage of 65-year-olds and over rose to 6.96 per cent, an increase over 10 years of just 1.39 per cent (Zhang, 2001) but one that seems bound to accelerate further.

Projections by the National Institute of Population and Social Security Research put the numbers of Japanese citizens aged 65 and over at 28.13 million in 2010 and 33.34 million in 2020 (*Nikkei Weekly*, 12 October 1998). Although the proportion of aged will continue to rise well into the 21st century, the actual size of the overall Japanese population is forecast to start to fall from 2007 and then decline significantly (*Nikkei Weekly*, 4 February 2002). The working population was expected to peak in 2001 and then fall (Ogawa, 1998). The Chinese population, on the other hand, is continuing to increase, albeit at a reduced rate, and is not anticipated to begin to decline before the middle of the 21st century (Kang, 2000).

The ageing of a country's population increases the likelihood that adult children who serve as carers are elderly themselves (Kosberg, 1992). Demographic shifts mean that a great many carers for the aged in Japan are elderly themselves, with the carer sometimes dying before the person they care for. It is not uncommon for someone in their seventies to be looking after a parent in their nineties and such cases often entail great personal hardship (Okifuji, 1996). A similar scenario is emerging in China. In Shanghai some married sons and daughters now have to support not only their aged parents but also their grandparents (Zhu & Xu, 1992). Over 90 per cent of Japanese carers for the aged are female and over half of them are over 65 (Miyahara, 1997). As life spans increase there could easily be three generations of members 60 and over in one family who are all drawing pensions on which they depend. Liu (2000d) cites the dilemma of poverty stricken Chinese women over 80 whose children are also old and have lost the ability to work, creating extra burdens on grandchildren who have to support several generations of elders.

China is not only the world's most populous nation but also has the most rapidly ageing population of any non-developed country. In the decades from 1949 up to the imposition of the one-child policy in 1979, population growth rates fluctuated as political campaigns came and went. In the 1950s, for example, Mao encouraged people to have large numbers of children to build up the country while population control was later encouraged in the 1970s. The one-child policy has resulted in a marked drop in the birth rate since its introduction. People have been encouraged to have fewer births for more rapid improvement of welfare (Ma, 1998).

China has had below replacement fertility for a generation (Zhao, 2001b). The full impact of this will be felt soon as the first generation of only children have their own offspring. As adults they could face responsibility for two parents and four grandparents under the frequently cited four-two-one structure (Leung & Nann, 1995). In 20 years the number of old Chinese will double and the ranks of the oldest old will rise at a still greater speed. In addition, their mean number of children will be significantly smaller than those of the present elderly (Zhao, 2001b). Gui (1999b) estimates that in Shanghai, where the situation will be most acute, 80 per cent of women 60 and over will have only one child from 2015. The nationwide figure will be 30 per cent from 2017. To encourage families to stop at one child if they have a daughter and not the traditional supporting son, family planners have been offering special pensions to provide for old age (*China Daily*, 3 January 1998).

Although China is still behind Japan in terms of ageing, the 21st century will see this gap narrow. By 2040, 25 percent of the Chinese population will be in the aged category. The number of citizens above 80 has almost doubled since the early 1980s

and stood at eight million in 1997 (Zhang, 1998b). There were two million Chinese aged 85 or over in 2000. Wu (1999) estimates that by 2050 the ranks of the 80-plus group will amount to seven to eight times the present figure and there will be 25 million citizens over 80 in 2010 and 160 million in 2050.

Socially constructed expectations of the life course and thus of family obligations are undergoing profound changes due to these demographic shifts. The narrowing of the age span within which urban Chinese women have children means that most no longer have the burden of looking after a child after entering their forties as they did previously (Zhao, 2001b). While Chinese women are having children younger, their Japanese counterparts are marrying and having children much later (Wang, 1999). As a result Japanese women are more likely to become the carers for both children and aged parents at the same time. Dependency ratios may become more onerous as the 65-plus group increase in relation to the 15 to 65 working age group and the under-14 group. Birth rates are particularly low in Japanese cities (Yi, 1999).

AGEING AND SOCIAL POLICY IN JAPAN SINCE WORLD WAR II

Full-scale welfare provisions for the aged in Japan did not emerge till after the Second World War, well after most Western countries had introduced them for large numbers of their citizens. In Japan earlier measures such as pensions and health insurance were restricted to servants of the state and none covered private citizens (Anderson, 1993). The government assumed such responsibility for the wider populace, including the elderly, only with the national constitution brought in during the Allied Occupation. The constitution stipulated that, 'All people shall have the right to maintain the minimum standards of wholesome living' and that 'In all spheres of life, the State shall use its endeavours for the promotion and extension of social welfare and security, and of public health' (Constitution: Japan, 2001: 8). Although much of this wording was rhetoric, and the aged did not initially feature as a special group, it did set the pattern for the expansion of services over the following decades.

In the immediate postwar years, when the aged were a minority, social policy emphasis was placed on young families and on rebuilding the nation. In 1950, for example, senior citizens made up only 4.9 per cent of the population (Maeda & Nakatani, 1992). The new constitution took away the traditional primogeniture of eldest sons that obliged them to care for their parents in their old age and extended inheritances to daughters and other sons as well (Hane, 1996). The postwar version of the Civil Code stipulated that lineal kin had a duty to support one another but was ambiguous about who was responsible for support of the aged. In contrast the prewar version clearly gave priority to care for parents and responsibility for this care to the household head (Kinoshita & Kiefer, 1992).

In the 1960s government policy placed priority on promotion of economic growth over social policy development (Uzhashi, 2001). However, in 1961 the government did bring in universal health insurance and pension schemes partly funded by mandatory contributions from citizens that established the basic structure of the Japanese welfare state (Lee, 1987). Prior to 1962, when a national subsidy program for home help services was established, there were no public community services for the elderly in Japan (Maeda & Nakatani, 1992). The 1963 Welfare Act for the Aged marked a turning point in care for the elderly. It shaped a system of institutional care

that for the next few decades catered for the economically and physically dependent while family care was still held up as the best option (Kinoshita & Kiefer, 1992).

Prime Minister Tanaka declared 1973 to be the first year of the welfare state, promising that Japan would try to catch up with the welfare record of Western societies. His ambitious plans were curtailed in the wake of the oil shock crisis later that year and the ensuing recession (Kwon, 1998). Nevertheless the year was a significant one for the aged as all Japanese aged 70 and over were granted free medical care (Yamasaki & Hosaka, 1995). 'The elderly had possible advantages over other possible claimants for public concern' (Campbell, 1992: 174) which included respect for the aged and the fact that everybody would become old one day. There was then a widening gap between the decline in their living standards and the rising affluence of the rest of Japan. This experiment proved costly. In the 10 years up to 1982, when the government re-introduced part payments for this age group, their medical bills increased 6.3 fold (Yamasaki & Hosaka, 1995).

In 1979 Prime Minister Ohira launched the idea of a 'Japanese style of welfare society' that would not be vulnerable to the ills plaguing Western welfare states. It was to be one in which the family would play a large part (Kwon, 1997). The concept did influence social policy for the next few decades but ultimately proved inadequate as the ageing of the population accelerated alongside other changes in society.

The 1980s saw the emergence of a new slogan of 'preparing for an ageing society' from the Ministry of Health and Welfare. The ministry acknowledged that the country would have to start planning for the future since it then calculated that by 2025 one in five Japanese would be over 65 (Kwon, 1997). Policy makers had to work out how to prepare for high demand for welfare, particularly in the areas of pensions and health care. Small but incremental changes were enacted to shift a greater burden of social welfare back onto the individual and the community (Goodman & Peng, 1996:204). These included the lifting of the retirement age and a consumption tax to boost social welfare funds. In 1985 the Ministry of Health and Welfare first proposed the raising of the eligibility age for government pensions to 65 from 60 but the practice was initially rejected due to concerns about a lack of guarantees for continued employment up to 65 (Seike & Shimada, 1994). In the same year the three public pension schemes unified, leading to pension coverage for the entire population.

Training of accredited carers for the aged commenced only in the late 1980s. Earlier workers were either untrained volunteers or graduates with no specific background in welfare work. In 1988 a national registration scheme was set up for home care workers and social workers. The following year the government introduced the 10-year Gold Plan to greatly increase the number of such workers and facilitate a major shift from institutional care to home care programs. The authorities hoped to cut state expenditure and also reduce the abnormally large numbers of bedridden by international standards (Long, 1996).

While the Gold Plan signified a major expansion of the Japanese welfare state by acknowledging that Japanese on average incomes and not just people in special need were the legitimate recipients of special government help, it proved a half way remedy. It was too small in scope to handle the task (Campbell, 2000). Much more was needed and the Gold Plan 21, to extend from 2000 to 2004, is continuing its goal

of greatly raising the numbers of paid aged care workers to take the strain off average families.

The latest major initiative of the Japanese government is the long-term nursing care scheme which commenced in April 2000 as only the second plan of its kind in the world. The system aims to move provisions from the former principle of selective application to universal coverage for all elderly Japanese in need of care (Eto, 2001:18). Policy makers hope to thus eradicate the social stigma formerly associated with taking aid from outside the family. The combined health and welfare services are open to all in contrast to previous services which gave priority to individuals lacking kin and pressured female relatives to put the needs of aged relatives over their own needs (Ikegami, 2000). Contributions are mandatory for all citizens over 40. The new scheme is regarded as a notable move forward. Ishikawa and Maeda go so far as to say, 'It appears that the public long-term care insurance provides a finishing touch to the democratisation and modernization of Japan that started half a century ago' (2000: 156).

Aged care policy in Japan now combines 'a generous pension system and high savings with high late life work participation' (McCallum, 2001: 55). However, this situation may not be sustainable in the long run without greater contributions by individuals to pension funds and more encouragement for employment of older workers as dependency ratios rise. These areas will be discussed in greater detail in subsequent chapters.

AGEING AND SOCIAL POLICY IN CHINA SINCE WORLD WAR II

The first decade of the People's Republic of China saw a system of social guarantees laid down in the cities where the state work unit became the sole employer. Within one generation the worst poverty disappeared (Davis-Friedmann, 1983). Pensions were created for the first time in China through work units and the elderly without income or family received special allowances. Article 45 of the constitution of the new republic gave citizens 'the right to material assistance from the state and society when they are old, ill or disabled,' and article 49 also reinforced the role of the family by stipulating that 'children who have come of age have the duty to support and assist their parents (Constitution: China).'

The Great Leap Forward of 1958 and the Cultural Revolution from 1966 to 1976 severely disrupted welfare services for the aged. During the Cultural Revolution pension funds accumulated for social welfare were used for other purposes (World Bank, 1997b). Mao's social values emphasised that hard work rather than dependence on the state gave a person dignity (Leung & Nann, 1995). During the Maoist era official propaganda strove to direct loyalty toward the state and not the family (Whyte, 1997). Filial piety was to be re-oriented toward the nation rather than family elders (Xu & Ji, 1999). Mao's Cultural Revolution demanded the unthinkable under Confucianism: that youths rebel against elders (Lieberthal, 1995). The egalitarianism promoted by the iron rice bowl system, which guaranteed secure jobs for life for urban residents, maintained low salaries alongside a wide variety of social welfare benefits that met people's basic needs. No-one could be laid off (Tang & Parish, 2000).

Deng Xiaoping's introduction of the policy of reform and opening up to the outside world in 1978 marked a fundamental change in official policy. It led to greater freedom for citizens in employment and the start of the wind back of former comprehensive cradle to grave welfare benefits. Free enterprise slowly emerged and disparities in incomes re-emerged. As reforms deepened, the capacity of state owned enterprises (SOEs) to remain financially viable was threatened by a sudden flood of retirees, since many urbanites forced to stay in their jobs during the Cultural Revolution took advantage of the new freedom to retire. They were encouraged to do so to provide jobs for their children returning from the countryside where they had been sent 'to serve the people' from 1956 to 1976. The emphasis in the new era of reform was on using the talents of the young.

In the 1990s the onus to take responsibility for the aged returned increasingly to the family as the authorities lauded traditional values such as filial piety (Lam, 1999). They espoused the creation of 'socialism with Chinese characteristics' (China brief, 1994). There was also more construction of facilities for senior citizens who either chose not to rely on their families or had no kin living nearby. The 1992 14th Party Congress emphasised the traditional function of the family as a source of social protection for its members alongside more neighbourhood responsibility. The Eighth Five Year Plan (1991-95) and Ten Year Development Program (1991-2000) stated that, 'A social insurance system for the aged should be established for people of different occupations in cities and towns, with the state, collectives and individuals sharing the cost' (*Beijing Review*, 18 February 1991: 21).

At the start of the 21st century the Chinese government moved to devise financially viable social insurance schemes. In 2001 a new social security law was drafted to cover medical insurance, pensions and unemployment benefits for workers in state firms undergoing major reconstruction to meet global competition, drawing on support from employers, employees and the state. A new pension scheme had been set up by the end of March in that year (*China Daily*, 27 April 2001).

New means have also been found to fund welfare. In June 2001 the government announced that 80 per cent of the proceeds from the national lottery were to go into facilities and care for the elderly, including day care centres, over the next three years as part of provisions for the aged in the 10th Five Year Plan (2001-2005) (Zeng, 2001). Further new measures will be essential in the years ahead.

The major shift that is taking place in pensions and medical care is one of the state moving from provider to regulator (White, 1998) as a comprehensive enterprise based model gives way to a more decentralised one (Tang, 2001).

THE FAMILY, EMPLOYERS, THE STATE AND THE AGED

Traditionally the elderly have enjoyed a position of respect in Chinese and Japanese society with their needs met by their families. These elders, in turn, have provided a source of leadership for the family as a whole and concrete day-to-day help for their grandchildren. The state has intervened to offer aid only to the destitute lacking kin. However, the impact of social changes and economic pressures may alter the balance of cross-generational reciprocity that has aided both young and old. The current generation of carers in Japan do not expect their children to give them the same level

of care that they are devoting to their parents. The feelings of many female carers are encapsulated in the words of one woman: 'We are the last generation to take on the burden of caring for our parents and the first generation that won't or can't depend on our children' (Okifuji, 1996).

Chinese social scientists believe that family care will remain essential for the elderly and that it would be extremely difficult for the state to take its place (*China Daily* 6 April 1998). Conversely, the government has needed to demonstrate to people that their quality of life in old age will not be adversely affected if they have only one child (Croll, 2000). Thus the introduction of the one-child policy has also marked the beginnings of the transference to the state of traditional family responsibilities and acknowledgment by the authorities that families will need external help for their aged (Sher, 1984).

Having children used to be a form of insurance for old age in China and Japan. This is definitely no longer the case in Japan where child raising has become a very expensive experience that offers virtually no economic returns (Atoh, 1996). In China also, some urban parents are beginning to treat children not as producer goods that bring a return after initial investment but as consumer goods that are simply enjoyed now (Tang & Parish, 2000). The greater part of the family income is lavished on the only child. The rest of the family come a very poor second, as all family hopes for the future are placed on this one individual. The cost of educating a child in Shanghai, for example, now adds up to 43 per cent of family income (Han, 2001). Such expenditure leaves little for older members.

Although family breakdown and the decline of the extended family are still well below levels in Western countries, their continued acceleration will put the onus on individuals and governments to shoulder responsibility for the aged. Where the elderly fulfil a positive role by providing assistance to their families, such as looking after grandchildren and running small errands, their presence within the wider family is a positive one. Chinese parents rely more on their families for assistance with child care than their counterparts in Japan. This is partly because Chinese women are in the full-time work force whereas many Japanese women are full-time housewives or work only part-time. This situation is changing however as employment patterns change in these two nations.

While divorce levels are still far below those in Western countries, they are rising in China and Japan. Furuhashi (1999), estimates there are 81,000 divorces a year in Japan caused by the strains placed on family carers. The Chinese government has recently tried to stem the tide of divorce by legislating to make it more difficult. In Japan, a society where marriage has been an almost universal norm, people are marrying later and then having fewer children. An increasing percentage of younger Japanese are choosing not to marry at all (Shaver & Peng, 2000). In some Tokyo companies 30 to 40 per cent of employees in their thirties are single and as many as 20 per cent may never marry (Ashby, 2001).

The rising numbers of urban dwellers in China and Japan mostly live in small spaces best suited to nuclear families and ill-equipped to cater to the needs of extended families. The young who move to cities to pursue more mobile and affluent lifestyles often leave aged parents behind in the countryside. While older Chinese and Japanese

have been content to put up with cramped conditions, the young of both nations often aspire to acquire more spacious living conditions like those of Western countries that they see portrayed in the media. Nevertheless, surveys on attitudes to co-generational living reveal a continued strong adherence to co-residence. Ironically many Japanese commentators bemoan the fact that extended households are on the decline while they praise assistance provided to the elderly under social welfare arrangements in the West where very few of the aged live with their children (Yamanoi, 1992, 1994).

In China government changes are weakening family capability to provide all the essentials of life for members. In the late 1990s the state began to scale back the supply of low cost housing to state employees in a bid to reduce government expenditure. SOEs that formerly provided cradle to grave security for workers and their families (World Bank, 1997b) have been abnegating or lowering their social welfare responsibilities, a large part of which are pensions, as they become responsible for their own profits and losses. Under the former system they had no difficulty paying out pensions as profits were pooled so enterprises were not dependent on their own individual success. Now they have to guarantee benefits themselves out of their own funds.

Approaches to social welfare and responsibility for care for the aged have markedly differed in the two countries over the last 50 years as a result of their very different political and economic systems. They have fluctuated to a greater extent in China due to the impact of massive political upheavals. Social welfare there has been an instrument to maintain social stability and enhance the legitimacy of the Communist regime (Leung & Nann, 1995). In Japan social welfare laws relevant to the aged have been upgraded and government aid gradually refined to meet new needs brought on by social change but at times the process has been slowed by fluctuations in the economy.

In both China and Japan social mores have discouraged families from seeking outside help for their aged and, in particular, placing them in institutional facilities. People who have put their parents in old aged homes have faced open censure from their communities. Similar attitudes among Chinese in Australia have led to them seeking relatively little government assistance for the aged compared to other migrant populations (Martin, 1998). In Japan many recipients of awards for caring for elderly relatives have found the recognition a curse rather than a reward due to the high social expectations placed on them. 'For some it appears the award was just more stress on top of the considerable stress of caring for the aged' according to Morikawa (1999), with recipients forced to persevere at playing the role of 'good daughter' despite being on the verge of physical collapse, as any relaxation of their attention would bring on criticism.

The ultimate question of who will pay for care for the elderly becomes ever more crucial as the ratio of aged to workers rises. The Chinese and the Japanese governments are endeavouring to cement measures that will force people to contribute more toward government schemes so that the future imbalance of age groups will not empty government vaults. They do not want to create a backlash of resentment among the young if they force them to pay for services for their elders that may not be available in the future as the size of the work force that pays for them shrinks.

Personal savings have always been comparatively high in both countries. In Japan this has been because citizens have assumed they would have to bear the burden of educating their children and looking after themselves in their old age. As a result of this thrift, in the 1990s the incomes of elderly Japanese were not inferior to those of individuals of working age and the aged possessed more savings than younger people. China has also had a tradition of saving for the future.

While elderly Chinese remain worried as inflation drives down the value of their pensions, the focus of concern in Japan has shifted from economic anxiety to fears of becoming bedridden or smitten by senile dementia (Yamazaki, 1993). Families are unsure whether they can cope with such eventualities. A 1995 survey of Japanese company employees found that their biggest worry was care of ageing parents and elderly in general, with the figure of 52.8 per cent far ahead of the next cause of worry which was a rise in land and housing prices at 22.1 per cent (Yamanoi, 1996). Paradoxically the latter should now be less of a worry as land prices have dropped dramatically with the recession.

Care allowances to families to meet the needs of the elderly have been posited as a possible measure by the Japanese government but they are not necessarily a solution. A Japanese survey (Yamanoi, 1996) found that people saw attention to physical needs as their top burden in home care, followed by inability to go out, then stress and insufficient sleep, while the financial burden came a mere fifth. Thus, the new long-term care insurance system is based on payment to external professional providers to encourage people to seek outside help rather than continue the task themselves. A proviso is added that low income people who need money can be paid for providing care for their relatives.

The Chinese government pays lip service to care for the aged. It is unsure where to source the funds for services as it seeks to overhaul insurance and pension systems nationwide. It hopes to make citizens assume more responsibility for their own futures but this is hard to guarantee in a climate of rising unemployment. The traditional social security system obviously cannot adapt to the requirements of a market-oriented economy according to Li Tieying, a senior official and also president of the Chinese Academy of Social Sciences (*China Daily*, 24 June 1998).

CONCLUSION

In this chapter I have outlined the general situation of the aged in Japan and China and the demographic changes that are altering their position in society. I have given brief histories of the development of social policy for the aged in the postwar years for the two countries and described general trends occurring now that may affect future action for senior citizens.

In the following chapters I examine the situation and prospects of catering to the needs of the aged in a wide range of areas, including housing, pensions, employment and medical care. I show how two East Asian nations are building up social policy to cope with what they see as one of the most pressing challenges of the next few decades. They must devise measures to ensure national prosperity in the face of ageing populations and smaller families, with all the repercussions that these trends entail along with the effect of globalisation on their economies.

CHAPTER TWO: COMPARATIVE RESEARCH AND NEW PERSPECTIVES

INTRODUCTION

In the first half of this chapter I examine the general dilemmas faced by a researcher undertaking cross-national comparative studies of social policy. Such a person requires a wide breadth of knowledge of all cultures and countries covered. Specific problems that must be tackled when comparing Chinese and Japanese policy include linguistic ones such as translation of terms from Western social policy into their East Asian equivalents.

I then consider how definitions of the welfare state and the economic and political positions of these two East Asian nations have affected coverage of them in Western comparative studies of aged policy. The categorisation of welfare regimes first proposed by Esping-Andersen in his 1990 study has led to much debate over what constitutes a welfare state and disputes over how to classify various nations. This has had much bearing on how China and Japan have been perceived in the West. It is still a subject of controversy.

In the second half of the chapter I outline the impact of Western influence on aged policy in these two nations. The readiness shown by China and Japan to incorporate ideas from outside the East Asian sphere, as well as within it, shows an openness to the outside world that has been reinforced in recent years by the impact of globalisation. Other countries, in turn, may have much to learn from China and Japan as they are forced by the record ageing of their populations to devise innovative measures that can preserve family care and also encourage greater individual self-sufficiency after the age of 65.

COMPARATIVE RESEARCH

Cross-national studies pose many potential problems. Firstly, they require a very wide breadth of knowledge. 'Ideally, no doubt, studies in comparative policy should be conducted by individuals possessing an equally comprehensive and sensitive grasp of each of the societies (including their own) in which they are interested,' according to Jones (1985:2). While I cannot claim this ideal background, I would hope that my nearly 10 years in Japan and over six years in greater China plus over 30 years reading about China and Japan and studying Chinese and Japanese may have provided me with some insight into the societies of these two countries and their ageing populations. I am continually learning something new about them just as they are continually undergoing change.

Milwertz (1997: 218) says that a prerequisite for cross-cultural study is 'a presuppositionless stance' and 'a conception of the culture in question'. She notes that the fact that 'the subjectivity of the researcher will influence the final analysis' has led some critics to question 'the possibility of representing the experience of another culture at all'. I acknowledge that my research has been coloured by my perceptions of the position of the aged in China and Japan and the relevance of social policy to their needs as a result of my experiences in these countries and, in particular, my friendships there. I would argue that these first-hand experiences have given me some

insight into ageing in East Asia and also provided a background against which to evaluate the texts that I have chosen for this study.

Tester (1996) refers to methodological problems such as the accurate pinpointing of equivalent concepts and terms. An understanding of such subtleties can take a long time to acquire. According to Baker (1992) an aspiring translator should ideally spend several decades accumulating knowledge of languages and their accompanying cultures before taking up the profession in their forties at the earliest. Her precepts might well be applied to comparative scholars.

Saunders cites the need for a common language in cross-cultural dialogues on social policy to create 'a shared understanding of the issues being addressed' (1999: 3). His failure while in Beijing to initially realise that Chinese academics had a different understanding of 'social security', the main theme of their meetings, led to some confusion. For the Chinese 'social security' encompassed not only income transfers to citizens with low incomes, as it does in Saunders's Australia, but also schemes for small business promotion. Chow (2000) cautions that the term 'social security' still lacks a clear definition in China that makes its use problematic. Use of the term has also led to confusion in Japan. After the words 'social security' were inserted into the English version of the postwar Japanese constitution created under the Allied Occupation, debate ensued about their meaning. Proposed translations into Japanese of the term of the constitution ranged from 'order of society' to 'security of living'. There is still some ambivalence about its use.

Long (2000) points out that the word 'care', a crucial one for this study, is highly ambiguous even in English. Its interpretation may vary between caregiver and care recipient. Long questions what constitutes care for the elderly and notes that the cross-national perspective of the book *Caring for the elderly in Japan and the US* can challenge 'our assumptions about what it means to care' (Long, 2000:3).

Comparative studies also face problems when trying to correlate data from a number of countries if there is no common measure or if criteria have changed over time. One example that has affected this study is the use of different ages to define the starting point of 'old age', making exact comparisons sometimes impossible. In non-Western countries old age has been most commonly expressed as commencing at 60 (Kinsella, 2000). The traditional 12-cycle Chinese calendar used in both China and Japan set old age as commencing at 60, which also marked the onset of a second childhood. However, Japanese gerontologists now tend to use the age of 65 in line with colleagues in the West (Ishikawa & Maeda, 2000). Chinese scholars have also been following suit although many still use 60, as seen in articles in demographic journals published by universities in China.

The age is likely to rise in the future. If old age is defined as beginning with retirement, as is often the case according to Walker (1983), the definition of old age will shift in line with state policy as the eligibility age for pensions is raised. The setting of 70 as the age for receipt of special old age provisions for health care in Japan from the 1970s on indicates that the definition can vary to meet economic expediency. The Japanese government is now proposing to lift that age to 75 to keep medical costs down. Writing about ageing in Japan, Traphagan notes that age is 'as much a cultural construct as a biological one' (Traphagan, 2000: 9) and that in Japan

‘chronological age is of less significance than one’s position in the life course relative to others’ (2000: 73).

The benefits of cross-national studies include ‘opportunities to gain a deeper and broader view of social policy issues than would result from a single country study,’ (Tester, 1996:5). They can thus offer a greater range of ideas that might potentially be transferred across cultures and so should be of interest to national policy planners. Research on an area such as aged policy cannot be confined solely to the direct situation of the elderly themselves. It also requires knowledge of the wider society since general attitudes to the aged help shape their place in the family, social status and mode of life. They do not exist in isolation and so cannot be planned for in isolation. In an era of globalisation where global forces impact on levels of employment and living standards national governments have less power than they did in earlier times to ensure the social security of their citizens.

Little is known outside the region about systems of care for the aged in East Asia. The low level of such research up to now has been partly due to a lack of materials in English and of Western social welfare researchers with a background in both Asian languages and cultures and social policy (Goodman & Peng, 1996). Campbell could note in the introduction to his 1992 book that it would be hard to find another individual like himself with an interest in Japan, government policy and ageing. Almost 10 years later more research is emerging on aged policy in East Asia.

Recognition of the extent of the impact of demographic changes in these nations has also come somewhat belatedly but the research situation is improving. Greater focus is being placed on East Asian states as their populations lead the world in ageing. Most comparative studies of care for the aged in English have tended to concentrate on Western nations, often giving passing reference to Japan, as they see the welfare state which provides such care as the preserve of modern industrialised nations. However, the very concept of the welfare state itself has been under debate since its viability began to be questioned in the 1970s. I prefer the term ‘welfare regime,’ defined by Esping-Andersen as ‘the combined interdependent way in which welfare is produced and allocated between state, market and family’ (Esping-Andersen, 1999: 34-5).

Comparison of China with Japan is not helped by the fact that the majority of Western studies that include Japan do not cover China, giving far less opportunity to compare the situation of state policy, market forces and aged care in China with developments outside the Asian region. Many compilers of comparative studies have not covered welfare regimes in the former Communist bloc because they have not fitted research models. According to Shiratori (1986: 193) socialist states have been deemed not suitable for inclusion because their citizens have lacked the civil liberty to ‘pursue their own individual way of life’ unlike their counterparts in ‘true’ welfare states. While people in socialist countries received cradle to grave welfare from the state they lacked basic life choices such as of employment and residence.

Oyen (1986), on the other hand, concedes that although the then communist East European states did not like to be dubbed welfare states, their social provisions ranged far beyond those of countries who regarded themselves as true welfare states. The same could be said of urban China prior to the market reforms of the 1980s. With the

demise of communism in the former Soviet bloc, China became one of the few remaining bastions of Marxist style welfare. However, China's increasing emphasis on money making and the dismantling of egalitarian welfare means the country is drawing closer to capitalist models (Goodman & Peng, 1996). The overhauls of the pension and health care schemes are much more along capitalist lines than the previous systems in place.

Another reason for the relatively smaller coverage of China in comparative studies on ageing than Japan has been inaccessibility to reliable data about the country. For several decades after the founding of People's Republic of China in 1949 studies on the communist nation lacked substantial verifiable material or any interest in ageing issues. In addition, the state run media placed emphasis on the youth of the new country. Attention was drawn to the aged only as witnesses to the maladies of the previous society who would applaud advances by the new regime.

Much of the material concerning provisions for the aged in China now originates from universities in Hong Kong that share a common Chinese language and culture with the mainland to which the colony reverted in 1997. Their schools of social work have been contributing to the re-opening of social welfare studies and practices that were shut down in China from liberation in 1949 to the end of the Cultural Revolution. Data from China is still lacking, however, in comparison to that for Japan. It is also more open to doubt as in the case of the 2000 census. Cartier (2001) believes the census may have undercounted children of 14 and under, thus calling into doubt the actual balance between the youngest and oldest age groups in the population.

Western comparative studies of the aged usually feature Western members of the OECD such as the United States, United Kingdom, France, Germany and the Scandinavian states alongside Japan. Castles (1998: 5) says these nations 'can be sensibly compared because they have many things in common' and because their long-term OECD status means they offer standardised data. However, concentration on such data, to the exclusion of other factors, has resulted in a very superficial view of Japan. Firstly, speaking of Esping-Andersen, but in a way that could be applied to other Western studies, Takahashi says 'Japan is nominally added as a silent partner' (1997: 5). Secondly, such concentration has omitted the context and history of social welfare development that have shaped attitudes on aged policy, features examined only by Japan specialists (Wada, 1998). Wada asserts that the 'treatment of Japan in the international literature has been limited to the inclusion of Japanese data in quantitative analyses' (Wada, 1998: 22).

Such limited comparisons have judged Japan to be an undeveloped welfare state because social expenditure by the state has been low. They have not recognised that 'in comparison to other advanced capitalist countries, Japan used different means to achieve high welfare outcomes' (Wada, 1998: 24). These means included the full employment and enterprise welfare enjoyed also in urban China until recently. Conversely, both China and Japan are experiencing rising levels of unemployment due to economic downturns, and the dismantling of former systems of lifetime employment, and so must rethink their welfare for both young and old.

China has also been excluded from comparative studies 'because of the very different economic course it has followed over the previous forty years' (Goodman & Peng,

1996:216). Esping-Andersen (1996) said he left China, India and Africa out of his comparative studies as it was logistically impossible to include them. In the introduction to the 1999 Chinese translation of his pioneer 1990 work *The three worlds of welfare capitalism* (1999a) Esping-Andersen acknowledged his failure to take proper account of East Asian models in the original edition.

In the same year he also acknowledged his omission of gender (Esping-Andersen, 1999b), a point criticised by Sainsbury who believes a 'gender-relevant framework of analysis has been lacking in mainstream comparative research on welfare states' (Sainsbury, 1999: 77). However, her proposed three gender policy regimes cannot neatly categorise China and Japan either. Nevertheless a gender analysis of aged care is important since women both make up the majority of the aged and are the main carers for senior citizens. Esping-Andersen (2001) has noted that it is 'mainly due to the changing biographies of women that demography is changing'.

Asian-based scholars have challenged the validity of the way Western scholars like Gould (1993) try to fit Japan into categories such as those used by Esping-Andersen. Kwon believes that Korea and Japan do not fit into Esping-Andersen's original typology since the model is a 'European historical product which cannot be easily applied to nations which have a quite different historical and political background' (Kwon, 1997: 477). Goodman and Peng point to the influence of East Asian countries on other regions of Asia as the leaders of 'market conservative social welfare' (1996: 192).

It is debateable whether Japan might emerge as a model outside Asia. Gould (1993) predicted gradual Japanisation of Western social welfare systems, with a new convergence likely to emerge between East and West over the next 30 years. Six years later Mishra (1999:99) thought Japanisation of welfare to be 'no longer a feasible option' if globalisation resulted in ruthless corporate competition worldwide. This does not mean that innovations in the Japanese welfare regime to meet the special needs of an ageing population may not prove apt models for adaptation. The new long-term care insurance scheme has been recommended as a template for an equivalent Australian service due to its 'universality of assessment for need, equity of access and equity of service provision' (McCallum et al, 2001:11). Its merits derive from the fact that the reforms embodied have 'taken on the best ideas in the world' (McCallum et al, 2001: 8).

Ramesh (2000) says that the growing appeal of East Asian social welfare systems in the industrialised countries is yet another reason to scrutinise them. On the one hand, the 'Right' has purportedly found empirical proof in East Asia for its claims that welfare cutbacks are essential to promote economic growth and employment. On the other hand, the 'Left' seems to think the West might learn from Eastern concepts of social care. They both would seem to be picking only those aspects they favour to bolster their own case, overlooking the complete picture.

NEW PERSPECTIVES - INTRODUCTION

Aged care policy in East Asia does not stand purely in isolation in a world where the forces of globalisation are breaking down national borders. Any examination of how social policy is developing to meet the impact of social and economic change on the lives of the aged in China and Japan must also recognise the relevance of the external forces involved in this process. They are partially shaping the future of the enterprise based welfare that has to date served to ensure secure livelihoods in both Japan and urban China and also evolving general pension and medical insurance schemes. They pose both a challenge to improve services for citizens and a threat to existing conditions.

Mishra (1999) believes that globalisation may be undermining the Japanese way of welfare. He writes, 'If full employment and company welfare were to go under, the Japanese system of welfare as we have known it since WW2 would come to an end' (Mishra, 1999: 88). Media reports from Japan in 2001 indicated that full employment and company welfare were indeed at threat with unemployment reaching a record high of 5.6 per cent in December and firms retracting welfare benefits such as subsidised housing for workers.

At a time when the ageing of the population and decline in the working age population might be thought to result in an oversupply of jobs, young Japanese are finding it very hard to enter the job market and middle-aged Japanese are being retrenched. They wonder what kind of old age they can expect if they cannot make a living now. The very affluence that led to Japanese workers receiving the highest per capita manufacturing wages in the world (Suzuki, 2001) has led to the loss of jobs to other countries in Asia where workers can be obtained far more cheaply.

China is one of these places. It is rapidly taking over Japan's former role as the manufacturing base of the world according to Tsuchiya (2001) who estimates that there are about 150 million unemployed in the Chinese countryside willing to work for less than five per cent of Japanese wages. Difficult times do lie ahead for China as well, however, as it industrialises. In the early 21st century the nation must tackle the problem of an ageing population, normally faced by countries with a high level of industrialisation, with the economic resources available in a country with relatively low incomes (Liu, 2001).

Concerned about how effectively they might cope with demographic pressures over the next half century the governments of China and Japan have both started looking beyond their own borders to Western and other countries for potential new measures for their senior citizens over the long term. If East Asian societies and their welfare systems possess anything distinctive, it may lie in 'the genuine desire to understand fully the realities and rhetoric of the welfare states in the other parts of the world – East, West, South and North' (Goodman et al, 1998: xvi).

Since 1990 the Japanese Ministry of Health and Welfare has been monitoring developments in social welfare in Europe and North America (Goodman & Peng, 1996). It has also been exchanging aged care expertise with the Ministry of Health and Aged Care of Australia since 1988 (McCallum & Kobayashi, 2000). Chinese

authorities have also been drawing on foreign expertise for the restructuring of their social security and health insurance systems. The Australian government has provided training in social policy measures for an ageing population as well as programs in other social security areas (Department of Family and Community Services, 2000). Beijing has signed a memorandum of understanding with the International Labour Organisation to draw on its experience to reform social security (Jiang, 2001). Both nations want their citizens to take more personal responsibility for their security in their old age rather than rely on either families or the state but they also want to retain traditional values.

State acceptance of an obligation to meet the general health, welfare and livelihood needs of all citizens, including the aged, arose earlier in Western countries than in Japan or China. The turning point for this introduction in the West came around the time of the First World War whereas in East Asia the transformation transpired after World War II (Komatsu, 1992). While the welfare state was going through what some consider its 'golden age' in the West from 1945 to 1975 (Pierson, 1998:121), Japan and China were devising their own solutions for the urgent needs of their societies in the reconstruction that followed the devastation of war. Japan principally focused on building up the national economy in the 1950s and 1960s but did bring in health and welfare measures for the aged and the population as a whole from the 1960s on. At that stage special provisions for the elderly covered only the very poor. Both China and Japan continued to assume that families would attend to all the needs of the aged. In the decades since they have counted on family support.

The People's Republic of China introduced cradle to grave state welfare benefits in the cities where it subsumed all workers under its auspices after closing down private enterprise. The only members of the Chinese aged specifically targeted for aid were those classified under the three 'nos' of no cash, no work or no kin (Sher, 1984). Through the 1970s and 1980s Japan went through 'three different concepts of social welfare catching up with the welfare states in the West, constructing the Japanese style welfare society, and being prepared for the ageing society' (Kwon, 1998: 62). National policy is still intertwining elements from all of these, despite disillusionment with the first two, in order to cope with the problems posed by the third.

Over the last decade or so foreign policy models have been adapted to suit the culture and traditions of East Asia (Goodman & Peng, 1996). Such adaptations have been deemed essential to accommodate both the unprecedented rate at which the populations of China and Japan are growing and their intrinsic evolving needs. However, while Japan has modernised since 1868 through learning from the West, the country is fast approaching the point when it, in turn, will be forced to establish new initiatives as population ageing there outstrips that in the West (Ohbuchi, 1997). From 2007, when Japan is predicted to be the first nation in the world to have its 65-plus age group reach 20 per cent of the populace, Japan may have to become a leader in social policy trends rather than a follower. Once this occurs, the Japanese will have to create their own models to deal with a huge elderly population (Ohbuchi, 1997). How Japan copes with this fresh challenge could prove to be educational for the rest of the world. The development of the long-term nursing insurance scheme established in 2000 is already proving so. It shows how Japan can create something new by drawing on 'the best ideas in the world' (McCallum et al, 2000: 8).

One area where China and Japan lag behind the West is in political activism among senior citizens. Elderly Chinese and Japanese are yet to draw on their potential power. Despite the massive increases in their numbers, they still possess little political clout and have yet to form themselves into the powerful lobby groups that their counterparts run in many Western countries. This could change over the next few decades. Du (2000) comments that, while elderly Americans have been able to create groups such as the Grey Panthers to fight for their rights, elderly Chinese can only be content with their lot and give way to avoid conflict. Elderly Japanese may be regarded as key voters because they have a higher turnout than younger electors but they have not been actively campaigning en masse to better their conditions. Conversely, in Europe aged policy is tied up with the voting clout of aged voters, as evidenced by Walker and Naegele's (1999) book on the subject.

CREATING CARE AND SECURITY FOR THE AGED

In recent decades Western countries have been moving from institutional to community based care for the frail aged who require assistance with daily living and or nursing care at home. They aim to wind down the percentage of state revenue directed toward the aged and social services generally. Governments want to encourage citizens to contribute more to their own upkeep in their later years and thus reduce pressure on social welfare assistance and the 'public purse'. A major impetus behind the move is the potential impact of demographic shifts on fiscal and social structures. Planners fear that, as the percentage of the older population rises due to low birth rates and greater longevity, a higher ratio of non-working seniors to workers will place onerous burdens on the working sector of the population.

China and Japan are moving in the same direction, albeit from a slightly different background. They have historically relied on families rather than institutions to meet the needs of most of the elderly in the community. China, with its tradition of women working full-time, has not been able to do so as effectively, but has had a far lower percentage of aged. Both countries now want to have citizens contribute throughout their working lives toward funds to provide for their income and health care after retirement. They also have some special focuses.

In Japan a major concern of aged care policy is to bring down the country's world record high rates of aged bedridden. Japanese commentators frequently cite the phenomenon as a national embarrassment on a global basis (Yamanoi, 1992 & 1994). They note how active effort is put into getting even very frail people out of bed in institutions and at home in the West whereas in Japan the practice of leaving the elderly in bed is regarded as a form of kindness and indulgence. This ethos and its ramifications are described in more detail in chapter three. One of the main goals of the ambitious national Gold Plan of the 1990s was the reduction of bedridden numbers to zero alongside the creation of the large numbers of carers needed to make home care by professional helpers a practicality. China, where the aged have to yet reach the critically large proportion that they make up in Japan, is still grappling with the needs of its population overall, the biggest distinctions being between urban and rural people rather than specific age groups. The peasants who make up around 65 per cent of the population have received only 11 per cent of social security spending (Tang, 2001).

The integration of health care services and long-term care services is a problem that plagues most OECD countries (OECD, 2000b). While the solution is sometimes seen as lying in long-term care insurance Germany and Japan are the sole nations to have implemented such systems to date. Germany enacted the world's first scheme in 1995 and Japan commenced the second in April 2000, drawing partly on the German experience combined with Scandinavian and home grown ideas. Campbell (2000) believes that Japan would probably have chosen such a social insurance system even without the German example as progression to this stage presented the best option for local conditions.

The Japanese scheme does differ from the German one in a number of significant ways. One is the age range of contributors. The German government requires all adults to make mandatory contributions. While the Japanese government initially envisaged doing likewise it subsequently decided to levy only citizens 40 and older to allay potential resentment among younger Japanese at having their taxes raised to pay for older Japanese. Another difference lies in the fact that the German model operates on a nationwide management basis whereas the Japanese one is under the auspices of local authorities.

The question of state payments for family member carers has also encountered quite different reaction in the two countries. While it has been accepted as standard practice in Germany it has aroused considerable debate in Japan. Japanese feminists lobbied against the practice, worried that female relatives might be kept in the carer role rather than freed from it (Campbell, 2000). However, although the initial plan did not incorporate carer pay for family it has been modified to include such payments on the basis that they might prove crucial in sustaining low income families. The carers who will receive this income will be principally women.

WOMEN: THE AGED, CARERS AND GENDER

Women make up both the main carers for the aged and the majority of the aged themselves in both the Western world and East Asia. Despite their prominence in terms of numbers their place has been largely understated till recently. Even the women's movement that re-emerged in the West in the 1970s took some time to include the experience of older women in its analysis of gender (Heycox, 1997). The so-called 'feminisation' of the aged is a direct consequence of women living longer than men. Since women tend to marry males older than themselves they are also more likely to be widowed and living alone than men. Because they have lower participation rates in the paid work force in their younger days they receive lower pensions and thus are more likely to be in poverty and require public assistance.

Despite these factors, women have been invisible according to one female commentator who chides prominent academics writing on the welfare state, such as Esping-Andersen, for failing to take adequate account of the caring roles played by women that sustain social structures (Peace, 1986). Esping-Andersen may be now reconsidering his position by acknowledging the importance of gender but others who base their work on his earlier theories continue to fail to account for it.

Governments have capitalised on the care provided by female relatives to keep down state spending on social services and health care for the aged. In China and Japan the

practice has been praised as typifying the persistence of local traditional values that prove the superior worth of their cultures. Japan, however, is showing signs of moves to shift social attitudes toward gender roles as patterns of employment change. A noteworthy point about the new care insurance scheme in Japan is the fact that it seeks to make it socially acceptable for families to hire outside assistance to care for their aged rather than assume that female members should sacrifice their jobs or their time to take on the task. The elimination of the social stigma attached to going beyond the family is a key component of this. Such service is now to be seen as an entitlement for all rather than as a benefit for only the less well off as it was in the past.

While in the West the emphasis for female family carers has been placed principally on looking after children, the stress in East Asian countries has applied equally to children and aged parents. However, a shift in the relative importance of different family relationships in East Asia could affect the directions of future carer focus. Although in Japan the adult mother-young child relationship remains acknowledged as the strongest link in the family, the married couple bond is assuming greater importance among many younger Japanese who value family over work. Thus younger Japanese are moving to what might be dubbed more Western type chains of relationships.

In China, where the authorities sought to break traditional family loyalties prior to reform, the husband-wife bond is the strongest family link in the cities. In addition, care of the only child holds priority over the needs of other family members, far outranking help for the aged. Older Chinese family members are among the major carers in Chinese society due to the help they take on for grandchildren. In both China and Japan the assistance the aged provide for grandchildren frees their daughters to take up paid employment outside the home. It serves to provide older family members with a sense of worth and fulfilment as they perform a very needed role and also develop relationships with their grandchildren. Caring work constitutes an important form of paid employment for women.

Women form the bulk of professional carers in both Western countries and East Asia. Fuchs (1996) notes the preponderance of women in this role in the United States where they constitute 87 per cent of staff in nursing homes. The Japanese government has been trying to overcome the great shortage of professional carers for the aged by increasing training programs for them. This, ironically, could boost the number of women in the work force. Such work is one of the few expanding areas of opportunity for employment in a country where rising unemployment is threatening lifelong employment and job security. The Japanese are looking for overseas expertise to augment their own capacities. Japanese nursing home operators are sending staff to countries such as Australia for short-term training, recognising they can gain skills currently not available within Japan.

ACCOMMODATING THE AGED

Western influence is emerging in housing arrangements for the aged in East Asia. Until recently ageing parents normally resided with the family of a son who provided them with financial and physical help that they reciprocated with care for grandchildren. While a high proportion of families continue this practice, the figure is slowly falling and looks set to drop even more when the post World War II

generations reach old age. Many middle-aged Chinese and Japanese say they do not expect or even want their sons, or increasingly daughters as a new trend, to carry on this tradition. They would prefer to live independently in their later years and have begun to prepare themselves for this eventuality.

Few elderly Chinese and Japanese presently reside in special urban retirement complexes but more may do so in the future as such lifestyles become more socially acceptable and affordable. The limited and expensive nature of building sites in cities has led to complexes being constructed as high-rise buildings that incorporate independent flats or hostel style rooms. Their provision of a range of amenities that include recreation rooms, restaurants and sporting facilities has led to them being compared to resorts.

Entrepreneurs have set up retirement villages with spacious grounds in the countryside of Japan where land is cheaper and in the more affluent coastal regions of China for both locals and overseas Chinese wanting to spend their final years in their ancestral homeland. The latter simulate an ambience of exotic luxury by building villas in mock Western and traditional Chinese styles. While entry to Chinese retirement villages is way beyond the means of ordinary Chinese, their publicity emphasises that their aim is to provide the respect and support deemed proper for the aged by Chinese tradition. Some incorporate features unique to China such as special kindergartens to enable grandchildren to live with their grandparents in the village (Old People's Paradise, 1999).

Western influence also extends to housing for the aged with special needs. In Japan professional carers dissatisfied with large institutions have set up small group homes for dementia sufferers, inspired by similar experiments in Scandinavia, Australia and other countries in the West. They also try to incorporate traditional Japanese features that evoke memories of the past for their charges. In addition, residential and domiciliary care in Japan is bolstered by cutting edge new high technology.

Major Japanese corporations are investing heavily in research into intelligent housing, robotic companion-helpers and other adaptations to enable the frail aged to remain at home for as long as possible. Their innovative products could make life much easier for senior citizens in the future and also translate into Japan taking the lead in aged care across the globe rather than being just a follower of trends from elsewhere (Dethlefs, 1999). Such technology may also help people to remain productive members of society or enjoy life for longer in ways we cannot as yet envisage.

WORK VERSUS RETIREMENT

The growth of life expectancy in China, Japan and the West means that most of their citizens can expect to live several decades beyond the retirement ages set when few lived long past them. This has ramifications for individuals and also for social policy. If old age is socially defined as beginning at retirement age, the 'old' are indeed becoming younger while their life spans are expanding considerably. Despite improvements in health at later ages, in the West the average age of retirement has been falling. A similar pattern has been creeping into urban China and Japan as economic pressures force redundancies of workers under retirement age. However,

both still have higher levels of older people seeking to keep some form of paid employment than their counterparts in the West.

Japan stands out among industrially advanced nations in terms of older workers and has unique active promotion of efforts to help the elderly keep or find work. The nation has consistently adhered to a positive policy of job maintenance and creation for older people not possessed in Europe or the United States (1992). There are far more older workers in Japan than in Western countries and work there is regarded as beneficial because it is a major aid to retaining health and social contact. In China many older Chinese use retirement as a time to seek other income rather than for relaxation. Both China and Japan retain mandatory retirement ages but these do not preclude people from seeking other forms of earning money over these ages.

DECENT PENSIONS FOR ALL

The introduction of aged pension and superannuation models from the West may affect the future way in which East Asians view work and save for their old age. China and Japan have enjoyed globally high levels of personal savings by their citizens who hope to thus make their children comfortable and ensure a secure old age for themselves. Their people have been able to build up long-term savings under full employment with no need to worry about tiding over years of unemployment. However, the erosion of job security in recent years in both countries has fuelled a search for higher earning funds than the low interest bank accounts that have been the most popular form of saving. Although their conservative 'avoidance of uncertainty feeds into the heavy reliance on banks' (Lincoln, 2001:8) the Japanese are starting to look at investing in the stock and bond markets.

In 2001 the Japanese government acceded to the adoption by Japanese companies of US style 401(k) as options for their workers (*Japan Times*, 23 June 2001). Policy makers see them as a possible avenue for alleviating future shortfalls in pension provisions. Such schemes, which entail tax deferred savings for post-retirement life, became the primary mode of retirement savings in the United States along with individual retirement accounts in the 1990s (Hurd & Yashiro, 1997). Their portability between jobs may appeal as corporate Japan increasingly sheds workers, signalling the shaky situation of the vaunted system of lifelong employment. Japan represents a potential large market for pension schemes as, together with the United States and United Kingdom, it holds three-quarters of the world's funded pension assets (Peterson, 2001).

Finding enough funds for pensions is already a major problem in China where, to date, recipients have been mainly urban dwellers. In the last decade the government has switched to requiring workers to contribute to their own pensions schemes after having previously fully funded them (Tang, 2001). The potentially large market of the country has been attracting the interest of western firms, with 18 overseas firms and joint ventures having obtained operating licences by August 1999 (*China Daily*, 18 August 1999).

CONCLUSION

China and Japan face massive challenges in the 21st century to ensure that their senior citizens can enjoy the right to a secure lifestyle enshrined in their constitutions. Both are considering major changes to government policies on social services, pensions and health. The Japanese government wants to retain high standards of health, education and incomes. The Chinese government wants to make a smooth transition from the former cradle to grave urban welfare system to new contract employment and self-funded pension and health care insurance schemes. Both seek to merge traditional values with new values to create care measures for their aged and are looking to other nations for ideas.

The Western countries that they are looking to for possible models may also be said to possess less assurance than they did in the past about the effectiveness of their social policies to deal with society over the long term. Expectations of the state's power to ensure safety social nets and security have changed. In the immediate post World War II era Western nations harboured a confidence that social engineering could be used to solve social problems such as poverty in old age. The Friedman school, for example, postulated that, as large-scale societies became richer, the incomes of the vast majority of people would become large enough for individuals not to need welfare assistance from the state. Hence state expenditure would fall (Titmuss, 1976). By the end of the 20th century such confidence had evaporated. Following the economic problems of the 1970s welfare systems were subject to enormous changes (Pinch, 1997). These are continuing. The 21st century looks set to be a time when many nations must learn how to deal with rapid population ageing by rethinking where the funding and personnel for this will come from.

China and Japan are likewise evolving new measures to care for their aged, drawing on their traditions and potential solutions that have proved effective elsewhere. The following chapters will outline where these are occurring. They include the role and place in society of carers for the frail elderly, measures to enable the physically active aged to continue working or enjoy adequate retirement incomes for a satisfying lifestyle, and provision of suitable medical care and housing.

CHAPTER THREE: CARERS FOR THE AGED: FEMALES, FAMILY, COMMUNITY AND THE STATE

INTRODUCTION

In this chapter I examine the role of carers for the aged in China and Japan. In these societies, where marriage has been near universal, women have customarily taken on the responsibility for looking after the ageing parents of their husbands. I outline how the part that Japanese and Chinese women have played in this regard has varied due to their different involvement in paid employment over the last half century. I also look at how social change in the form of lower birth rates might impact on such care in the future. Governments are examining how they can aid families to provide care for the aged.

In Japan a long-term care insurance scheme launched in April 2000 marks a government recognition that the state should take on the role of carer, easing the burden on families. Paradoxically, the new jobs created by the scheme will probably go to women who will be paid for work they formerly did for free. In China the role of neighbourhood street committees, long carers for the aged, has been affected by a new climate of money making in an era where enterprise welfare benefits are being disbanded.

Female relatives have traditionally provided the bulk of care for the aged in China and Japan, as has been the common case throughout the world (Kosberg, 1992). The wives of sons have been expected to take on the task as part of their duty to their husband's line, while the responsibility for ensuring adequate care and a place within the family home has rested with sons. Families have not called for outside help as to do so would cause them shame. The role of the state prior to the second half of the 20th century was limited to giving charity to those aged who lacked kin to care for them, while families were morally and socially obliged to take care of their own. The traditional extended family for which East Asian societies have been well-known was one in which all generations of a family lived under one roof to foster a caring environment for both young and old.

This situation has been slowly altering as changing population demographics result in increasing urbanisation, smaller families, larger cohorts of aged and extended longevity. Although families can no longer be assumed to take on the responsibility for meeting the needs of their elderly as in the past, governments have not formulated fully adequate substitute support. State authorities are actively trying to devise new measures. Japan is further ahead with its nursing care insurance scheme that aims to enable more of the aged to stay in the community. China's greatest challenge lies in aiding the aged in rural areas as state provisions are more advanced in the cities. However, the greater success of the one-child policy in the cities compared to the countryside means that smaller families there may have a harder time in the future to care for their aged.

China and Japan are considering major revisions to state policy for older persons but the laws of both still stipulate that children have a duty to look after their aged parents even they are rarely enforced. Their policy makers are loath to commit to high

spending on social welfare and health if they can persuade families to assume the work and costs themselves. They point to the decline of the welfare state in the West as a sign of the ineffectiveness of heavy state subsidisation. They also sometimes cite this as proof of the superiority of their own measures for the aged that are based on a Confucian tradition that has endured for thousands of years (Lam, 1999). In China this is ironic as the new nation often downplayed the role of the family up until after the Cultural Revolution.

Care for the aged is shared mainly by family members, followed by volunteers and paid help. Women still form the bulk of active carers in all three categories in both China and Japan. The care problem is seen as a female problem because it invariably falls to women to resolve it (Sugimoto, 1998). Women also constitute a greater proportion of the aged than men, especially in the higher age groups. For example, in Japan they make up 59 per cent of the aged and 69 per cent of the elderly over 85, while women form 80 per cent of citizens 65 plus who are living alone (Sugimoto, 1998). The 2000 Japanese census showed that one in 5.6 women 65 and over were living alone (*Japan Times*, 30 June 2001). Thus, any discussion of the role of carers for the aged and the aged themselves in these societies necessitates an examination of the changing role of women in society in general and in the work force in particular.

Work force participation marks a big point of difference between urban Chinese and Japanese women and the consequent amount of time they can devote to family elders. In general terms, since the 1950s full-time employment has been the socially sanctioned norm for working age Chinese women whereas the housewife role has been the ideal in Japan for women the same age. Most married Japanese women in the work force have been part-timers. Economic pressures are both forcing more Chinese women out of the work force and more Japanese women into it.

More Japanese women are now working longer hours to pay family expenses. They thus find themselves unable to fulfil family obligations to the extent expected in the past. More Chinese women are being forced to retire early as ailing state enterprises try to cut costs in order to avoid bankruptcy. They then take on care for children and the aged to lighten the household load of younger family members (Yuen-Tsang, 1997).

The proportion of women in paid employment in China is said to be one of the highest in the world since 'Chinese women continue to choose to work at high levels compared with Western and other Asian nations' (Parish & Busse, 2000: 231). The mass entry of women into the work force in China in the 1950s resulted in the demise of the full-time housewife, a role that became socially unacceptable under the socialist government that decried Confucianism. It tied in with the new regime's bid to make loyalty to the state override traditional loyalty to the family. Although debate has arisen since the 1980s about whether women should return to the home, the full-time housewife remains a rare phenomenon seen only in some of the newly rich in cities.

In Japan, on the other hand, the housewife totally devoted to family has remained the social ideal for women throughout the postwar era. Even though more Japanese women are now going out to work their numbers are still far below those of their counterparts in China. Paradoxically, the growth of the aged care industry is drawing them into the work force by providing far more potential positions for them. The bulk

of those training to become home helpers under the new long-term nursing care insurance system are female, so women will be receiving payment for work they formerly did for free to assist families other than their own.

There has been some debate about whether women should be paid for looking after their own relatives with doubts expressed about whether this would help or hinder them. Feminists have been concerned that women might be forced into providing care when they would prefer to be in the work force and so have opposed such remuneration (Campbell, 2000). In Germany, on the other hand, paid care by family members has become part of the long-term care insurance scheme. Just as the scheme in Japan started up it was decided that it would include a family nursing care gratuity to family members under certain conditions (Miyatake, 2000).

The ranks of paid professionals caring for the aged look set to escalate in both countries as official training courses for them increase but there are worries over a decline in volunteer ranks in the community. In China this is seen as a result of greater enthusiasm for money making now that private enterprise is sanctioned by the state and no longer frowned upon. The bulk of Chinese volunteers are themselves aged retirees since younger Chinese are fully engaged in the work force. With the fall in value of their pensions and withdrawal of social welfare benefits senior citizens are looking for potential sources of further income rather than volunteer community work. In Japan the decline in volunteers is ascribed to the rise in female employment and to women defaulting on what is still seen as their proper duty.

Professional care for the aged has been mainly the province of women in the areas of both social welfare and health care. The social welfare society in Japan has been feminised since the 1980s (Sugimoto, 1998). In China, too, community workers are mainly women. In both China and Japan the role assumed by professional social workers in Western countries has been shouldered by local community members as volunteers or by very low paid unqualified workers rather than by qualified professionals from outside. This has had its roots in earlier similar traditional systems of social control in both cultures based on dividing the population into small groups to ensure 'mutual aid and obligation among families' (Goodman & Peng, 1996).

Family payment for care by privately hired helpers is much more feasible in China than in Japan due to wider income disparities between cities and the rural hinterland in the former. Urban dwellers in China can afford to engage maids from the countryside at very low wages to live in and care for their aged. Such full-time care is not an affordable option in Japan where carer wages are much higher. A number of aged Japanese have moved to places such as the Philippines where such cheap help is available (Yamamoto, 1997). The Silver Columbia scheme of the 1980s that proposed to encourage older Japanese to spend their later years in other countries where their money would go further failed because it was criticised as being only a way to export aged people (Oishi, 2001).

The balance of dependency and support within family relationships in Chinese and Japanese culture was first described as a 'feedback' model by the eminent Chinese sociologist Fei Xiao Tong who coined the term 'relay' model for its equivalent in the West (Chen, 1996: 60). Under the former model, society expects parents to provide care and financial support for both their parents and their children, whereas under the

latter model parents only have obligations to their children. The Chinese constitution explicitly supports the feedback model which makes aged care a responsibility primarily of the family (Chen, 1996). Proponents of the Japanese welfare model in the 1970s said it was superior to what they dubbed dysfunctional Western social security systems because Japanese families looked after their own elderly members whereas Westerners left them reliant on the state (Takahashi, 1997). Policy emphasis is now shifting to greater acceptance of external providers of care.

Finally, and very importantly, within the East Asian family, care is not just a one-way process in which only one side gives and the other receives but is very much a reciprocal model. In both China and Japan the aged often provide valuable care for grandchildren and assist with domestic duties, allowing their children to concentrate more on their work and earn higher incomes. Anderson (1993) cites child-care assistance provided to working mothers as a possible reason for the slight increase in over 65 year-olds living with relatives in the mid 1980s. In urban China proximity of grandparents lightens the child-care load of mothers (Chin, Short & Entwisle, 2000). The aged also offer financial assistance to their children, adding to family income rather than drawing on it.

The image of the aged as always dependent on others is a common misleading one. Often families in East Asia only function effectively because they can count on the extra helping hand given by senior members. As the heading of a chapter in a recent book on care for the aged from China aptly summarises the dilemma: Ultimately, who looks after who? (Chen, 2000)

JAPAN

The status bestowed on elders in traditional Japanese society assumed not only that they could depend on others for assistance but also that they would provide direct help to younger members of the community (Traphagan, 2000a). The respect customarily accorded to the aged in Japanese society acknowledged their acquired wisdom and also their right to receive care when necessary (Hendry, 1999). However, social and demographic changes are eroding this respect and also impacting on the roles of carers.

Traditionally the oldest son has assumed the role of ensuring care for his parents in their old age under the same roof with his wife and children. He has planned his life cycle on this basis. His wife has taken on the actual task of physical day-to-day care for his parents along with all the other housework in a culture where men do not help at home (Kamata et al, 1998). A woman marrying an eldest son has had to assume responsibility for looking after her in-laws or face sharp criticism if she did not fulfil this task. The dutiful daughter-in-law who provided aged care won accolades as the fundamental foundation of a special Japanese style welfare touted in the 1970s as a fitting alternative to Western welfare systems (Higuchi, Okifuji & Sodei, 1999).

In recent years her duty has become the lot of far more women than before. The task of care of aged parents fell on only one of a number of siblings in the past when families were larger and far fewer people survived to old age. The remaining children were free to set up their own separate households and a small number of traditional extended families co-existed alongside many nuclear families (Ochiai, 1994).

Nuclearisation levelled off and began to decline around 1975 as family sizes dropped (Ochiai , 1994). The number of extended family households actually rose in the 1980s in contrast with the West where only a fraction of the aged live with their children. This trend that applies only to Japan looks likely not to continue as generational attitudes shift and more of the younger generation from one- and two-children families face the prospect of having to take on responsibility for aged parents.

Now that three-quarters of younger men are an oldest son, most Japanese women who wed will marry an oldest son (Ochiai, 1994). The prospect is making marriage look less attractive to women. Whereas previously marriage was regarded as an inevitable stage of the life course, women are beginning to query whether to marry or not as they weigh up the merits of single and married life. Ochiai (1994) notes the case of a young female student who asked for advice as to whether to marry or not because the demands of her fiancée placed the student in an intolerable quandary. The fiancée insisted that they could only marry if she first agreed to put her own parents in a home so she could look after his parents if both sets of parents became ill at the same time.

Men too are less inclined to wed. According to Morinaga (1997), author of a book on the trend away from wedlock, 20 per cent of males born in 1965 will never marry as part of a process among the young of ‘liberation from the family’ and also due to the fact that the current economic and taxation systems favour the single life. Such trends will have much greater impact on the birth rate in Japan than in Western countries since de facto couples and single mothers are rare. Thus in the future there will be a higher percentage of adults without sons or daughters to care for them in their old age.

The tradition of sons taking on the responsibility for aged parents has been further reinforced by Japanese adoption customs. Two-thirds of all adoptions in Japan are of adult males by couples without a male heir (Kato, 1989). Parents who do adopt in order to have a son look after them in their final years are said to want not just mere financial assistance but also ‘compassionate caring with filial warmth’ (Kato, 1989).

More married women are having to join the labour force rather than remain full-time housewives so their families can afford three basic household expenses: housing, education of children and care for the aged. The continued policy emphasis on the aged as opposed to children by the government is said to be contributing to the low birth rate as families choose to have fewer offspring for financial reasons. The Japanese in their forties and early fifties, who bear the burdens of guaranteeing both cash and care for the generations above and below them, are the most stretched for household finances (Nagahara & Yoneda, 1986).

Government policy is shifting toward greater recognition of the need for women to work and also to have time off for emergency family care. Carer leave inaugurated for workers in April 1999 enables both men and women to take up to three months off. The relative shortness of the leave is due to the fact that it is intended to give families time to devise a long-term care plan for their relatives rather than quit work to take over that care on themselves (Furuhashi, 1999). In 2001 proposals were made to extend the time limit to six months. The legislation also acknowledges that both work and home are now the domain of men and women equally (Furuhashi, 1999).

In a trend that would seem to fly in the face of tradition over recent years, more ageing parents have been choosing to live with their daughters, although most still stay with their sons. This represents a major change from a patriarchal system that considered daughters lost to a family on marriage. Families now take back daughters who divorce and temples allow married daughters to be the custodians for family graves, a responsibility that formerly rested solely with sons (Ochiai, 1994). From 1981 to 1990, the percentage of aged parents living with daughters rose from six to 10.6 per cent while the percentage living with sons dropped from 34.8 to 28.2 per cent (Ochiai, 1994). While in China sons remain the preferred child under the one-child policy, as they are perceived as a source of financial support in old age, many Japanese now prefer to have daughters since they perceive them to be more kind-hearted toward aged parents (Zhang & Yu, 1998).

The idealised concept of the Japanese family and family care has been challenged. Ferries (1996) argues, for example, that the assertions of Maruo that the elderly live with their adult children because they want to do so, and because their children accept the practice, ignore several significant points. The advocacy of a family based welfare system for lower income groups is impracticable as typically both husband and wife must work and share only a small living space. They resemble the typical urban Chinese couple who have difficulty caring for the aged for the same reasons. In turn, both benefit from valuable assistance provided by aged parents with household duties and grandchildren since so much of their time is taken up by paid employment.

Reciprocal care within the family has formed one of the foundations of Japanese society, but there is some doubt about how long this pattern of reciprocity will endure in the face of large-scale social change. Coming generations may not expect the same level of care from their offspring that they give to their own parents. Surveys of the immediate postwar baby boomers indicate that they do not anticipate receiving back the same aid they are giving their children or planning for their parents (Okifuji, 1996). Consequently they feel very insecure about who may help them as they face problems with age. International surveys have often revealed that more Japanese are worried about support in their old age than people in other countries (Aged policy section, 1996). This is said to partly account for the relatively higher levels of personal savings in Japan.

Spouses of the aged are also major carers. Although most of them are female, the recent resignations of a small number of high profile Japanese men to care for their ailing elderly wives has focused attention on male carers (*Asahi Shimbun*, 20 April 2000 & 11 August 2000, *Mainich Shimbun* 22 May 2001). Harris, Long and Fuji (1998) have explored the little studied area of Japanese men taking on the role of carers and concluded that their contribution is far greater than has been acknowledged so far. Men now constitute 15 per cent of caregivers for the elderly (Long & Harris, 2000). In addition, older men are being encouraged to become more self-reliant in their homes rather than rely on their wives. Senior citizens centres now offer courses in housekeeping skills for older men (Harris, Long & Fujii, 1998).

The number of aged carers has been increasing as the ranks of older citizens swell. More than 80 per cent of male carers and 50 per cent of female carers for elderly spouses are 70 or older. Over half the informal carers for aged parents are over 50, while 35 per cent of unmarried daughter carers are in their sixties and five per cent are

over 70 (Kono, 2000). Tales of aged carers dying from exhaustion from their tasks occasionally appear in the Japanese media. In Japan being a good carer has meant sacrificing everything else in order to be available at all times, turning it into virtually a 24-hour-a-day job (Harris et al, 1998). Many carers give up all their other pursuits to concentrate on the person in their charge, cutting them off from contact with the wider society.

People who have sought aid from outside for their relatives have been stigmatised as lacking in proper respect for family. The care insurance scheme introduced in April 2000 aims to make calling on external support more acceptable. This government initiative designed to promote home care and the use of home helpers to ease strain on families blends social welfare and health services. To date it has received much criticism that it has not lived up to its promises, one complaint being that helpers lack enough time to communicate with the aged as they have to rush to get through their allotted chores (NHK TV news, 16 September 2000). But it is still in its early days.

Some commercial providers of these services who early invested heavily in hiring staff and advertising have suffered heavy financial losses because they have not attracted enough clients. One major firm with no prior expertise in the area had to sack many staff at the end of 2000 because it had overextended itself. The unexpectedly large demand for domestic work compared to physical care has been partly attributed to the lower cost of the former (Harihara, 2000). The failure to take up services may be due to public lack of knowledge of what is available and a lingering reluctance to look outside the family for help. Only 10 per cent of the aged are estimated to need these services although all Japanese over 40 have to contribute to the scheme (*Mainichi Shimbun*, 12 January 2001).

The real burden for family carers comes once aged parents are bedridden and require more intensive care around the clock for their physical needs. A significant number of elderly Japanese who must depend on their families for care expect constant attention (Ushikubo, 1998). Japanese society has been described as epitomising dependency (Ushikubo, 1998). Rehabilitation of the bedridden to some extent requires the rejection of nurturing by the caregiver, particularly where the carer and patient are related. Old people in Japan stay in hospital beds for a long time because little effort is made to get them up and out (Kiefer, 1987). If the nursing care insurance scheme cannot succeed in one of its major goals of easing the burden of aged care on families by substituting satisfactory paid care this major social problem will become even more acute.

Japan has lagged behind other industrialised countries in terms of home helpers for the aged but the government has been actively working towards changing this situation. In 1972 there were only eight home helpers per 100,000 persons in Japan compared to figures of 800, 110, 20 and 10 in Sweden, the UK, West Germany and the United States respectively. The Japanese share increased to about 25 per 100,000 in 1989 (Maruo, 1986). Efforts by the Gold Plan and New Gold Plan in the 1990s led to the number of workers in welfare and nursing facilities rising from 132,000 in 1995 to 340,000 in the 2000 census. In the same period the number of home helpers went from 33,000 to 142,000 (*Japan Times*, 30 June 2001). However, the Ministry of Health and Welfare has previously estimated that the figure needs to go up to 580,000 by 2010 (*Japan Times*, 16 June 2000).

Courses to train home helpers for the new long-term nursing care system have been attracting many students as the Japanese economy has been hit by record unemployment levels. More universities and colleges have been introducing such courses to meet demand as numbers fall in some other departments. However, there are fears that enthusiasm for these courses will wane if the recession lifts and further positions with higher status and pay become available. Pay for helpers is quite low compared to average salaries. Welfare workers generally have been poorly paid because their role is seen as an altruistic one that requires a dedication which overrides personal hardship (Kinoshita & Kiefer, 1992).

Home help work has been deemed undesirable by younger Japanese who avoid any form of dirty work. Most of the new helpers have been the middle-aged women who assume much of the care for the aged at home at present. They express enthusiasm for new courses. One 51-year-old confided to a national magazine that she found a six-month carer course she did a source of delight because it was so fulfilling (Watanabe, 1999b).

A system of graded carer training begun in April 1991 has been targeted at these women who, having raised their children, want to return to the work force that they left at marriage. Grade one, which entails 360 hours of classes and practice, leads to national care welfare worker accreditation. Grade two which entails 90 hours of classes certifies graduates to look after the bedridden. The lowest grade of three, which requires 40 hours of classes, qualifies people to assist the aged at home (Sugimoto, 1998). Qualifications have also been introduced for housing environment coordinators whose role is described in the chapter on housing. All these courses have resulted in the proliferation of the cram textbooks that typify other workplace qualifications in Japan. Bookshops feature them as a separate section, alongside sections on the 'old age problem' and the ageing society.

Worries that not enough Japanese will take up home helper training has led to proposals to train overseas Japanese for the task. A successful 1988 experiment brought in the first group of 300 Brazilian women of Japanese extraction (Shinotsuka, 1993). A training course at grade two level was set up in Thailand in April 2000 with support from the Thai government to tap a new source of carers (Negishi, 2000). There is a need to train a younger cohort of workers as most of the Japanese-Brazilian nursing aides currently in Japanese hospitals are around 60 years of age (Hagi, 2000).

Hiring of foreign carers remains restricted to people of Japanese descent but a new law drafted by the Ministry of Justice proposes to accept foreigners. If living standards are to be maintained Japan may be forced to depend on workers from outside as its population rapidly grays and the working population shrinks (*Japan Times*, 6 March 2000). However, major shifts in public attitudes are essential. Although much lip service has been paid to the notion of internationalisation in recent decades in Japan, many Japanese are reluctant to see an influx of foreigners into the country. Ironically, one thing foreign residents and aged Japanese share is a reluctance by landlords to rent to them, both groups being regarded as likely to cause unforeseen problems and thus to be avoided if possible (Nakamura, 1999).

Economic pressures may force Japan to look for carers from outside. China could become a provider both within Japan and also in China. Already one area in the former Manchuria has been advertising live-in care facilities for aged Japanese on the Internet, albeit without the permission of local government authorities (*Japan Times*, 1 October 2000). A Tokyo welfare organisation, Keiro-en has been assisting aged Japanese to take advantage of this Liaoning aged care home (*South China Morning Post*, 5 June 2000). If Japan could offer professional help to China in the area of aged care, sending aged Japanese to China might not be seen as just dumping unwanted people. Earlier proposals for Japanese to spend their later years in cheaper countries such as Australia, Spain and the Philippines were seen, rightly or wrongly, as propelled by this very reason (*China News Digest*, 7 June 2000).

In a new twist, the Gifu and Wakayama prefectural governments announced in 2000 that women's prisons would provide nursing care courses for their inmates. A Justice Ministry official said, 'Nursing care jobs match the needs of society and will lend themselves toward nurturing care for others, which in turn will help rehabilitate the prisoners' (*Japan Times online*, 24 August 2000).

The role of professional social workers has been far less important in Japan than in many other industrialised countries since a great deal of their functions have been performed by the volunteers. Like aged care workers, social workers only received official accreditation in 1987. The passing of the legislation to set up more formal qualifications resulted more from worries about dealing with an ageing society than with the social work profession per se (Abe, 1998). The laws set out the appropriate work content for each status such as offering counselling and care to the needy, including the disabled and the elderly (National Committee of the International Council on Social Welfare).

The new professional care managers who coordinate services under the long-term nursing care insurance scheme have been criticised as lacking sufficient expertise for their jobs (Hirao, 2001). Many were been rushed into positions in 2000 to fulfil a need created by the inauguration of the scheme. In their consultations with clients they use a series of set questions analysed by computer to determine the level of care applicants are eligible for. Their role could be said to be encroaching on that of a group of volunteers who have served the government for a long time.

The Japanese welfare system has for many decades relied on a network of voluntary social welfare commissioners rather than on professional social workers for the bulk of its social work provision in the community. These volunteers have far outnumbered their paid counterparts, helping to keep down state social welfare costs. In 1996 there were 190,000 of them compared to 15,000 paid social workers (Goodman, 1998). They have been recruited on three-year renewable contracts to work within their own communities, receiving a small stipend insufficient to cover even their expenses. Each has worked for an average of 90 days a year, making around 120 household visits. Most have been retirees and the majority of their work has been with the elderly (Goodman, 1998).

Commissioners possess a familiarity with local people that facilitates their ability to uncover those in need of public assistance (Ben-Ari, 1991). They have more time to spend time with clients than professionals with heavy caseloads so they can, for

example, drop in for chats and gradually build up a picture of family problems. They also serve a similar public education role to their neighbourhood committee equivalents in China by providing information on services. Conversely, they enjoy higher social status than their Chinese counterparts. As well-respected figures, they are honoured guests at community functions and take on a political role 'in the sense that they become a kind of proxy representative of the aged and their interests' (Ben-Ari, 1991:157). In the group based societies of both China and Japan such volunteers are expected to work with families rather than individuals.

The role of commissioners is set for re-examination since the introduction of the nursing care insurance scheme and the consequent shift in emphasis from support for only a select few of the aged to aid for all. More paid professionals in the form of younger care managers will be involved. From now on commissioners will assist in strengthening individual aid activities and creating home help networks and welfare based communities. The government plans to get them to focus on citizen and volunteer related activities to contribute to new directions (Watanabe, 1999b).

In the future the aged care industry in Japan may rely more on non-human care for the aged as the human work force shrinks. Major Japanese corporations are already at the global forefront of development of robots for domestic and service roles, with aged care a major focus of research. Robots available 24 hours a day could provide valuable adjuncts or replacements for overworked human carers. In 2001 Matsushita Electric Industrial opened a retirement home where a network of pet robots paired with individual residents could offer 'off-line companionship as well as on-line diagnostic care' (Bickers, 2000). They communicate using a simple vocabulary and also monitor the state of health of their charges. The reputed propensity for Japanese to relate to machines such as robots and transfer human emotions to them more easily than people from other cultures may help in this regard (Yoshida, 2001). It has been said to account for the fact that use of robots is far more advanced and widespread in Japan than elsewhere.

CHINA

In urban China, as in Japan, the provision of sufficient carers for the aged is a looming social problem that stems from changes to family structures and relationships due to the impact of economic reform and demographic shifts. Shrinking family sizes since the introduction of the one-child policy in 1978 mean that a growing number of elders will have fewer children to rely on in the early 21st century. Urban areas, where enforcement of the policy has been much stricter than in the countryside, will show the effects earlier. Average household size in cities is around three persons (Chen, 2000).

Families do continue to shoulder the bulk of care for the aged with the active encouragement of the state. Sentiments of filial obligation appear to remain robustly intact as urban China enters an era of rapid population ageing (Whyte, 1997). However, fears exist that the latest generation, which consists of single children, may not adhere to the social obligations of reciprocity that have fostered filial piety down through the centuries. These so-called 'little emperors' have been described as excessively spoiled and self-centred since they are doted on by parents and grandparents. Often the bulk of the family income is spent on them. The parent of one

such child has said, Children of my son's age are very egocentric ... I don't think I can rely on him to take care of me when I grow old' (Yuen-Tsang, 1997: 197). This factor, coupled with the impact of economic reform, may result in a very different pattern of aged care as the 21st century progresses.

To date urban Chinese parents have possessed few material assets to hand on to their offspring so it could be said that adult children in China 'owe less to their elderly parents than do children in capitalist industrializing societies' (Lee & Xiao, 1998). Socialist policies introduced post-1949 sought to restrict private ownership and inheritance of property to foster an egalitarian society where birth did not result in undue privilege. It was only in 1985 that the first inheritance law made legacies once again legal. Recent government policy has encouraged citizens to contribute more toward their own pension and health care benefits and rely less on the state. It has thus seen the accumulation of wealth as a positive attribute. The private purchase of housing that is replacing subsidised rental will create a new type of inheritance.

Material wealth has not been the main legacy Chinese families have bestowed on the young to encourage their devotion to elders. This contrasts sharply with Japan where one-third of household wealth is transferred rather than earned life cycle wealth (Yashiro, 1997). In China the most frequent form of intergenerational support is practical assistance in various aspects of life (Yuen-Tsang, 1997). In the 1980s state work units encouraged older workers to give up their jobs to their children returning from the countryside where youth were sent en masse during the Cultural Revolution. This coincided with a sharp increase in retirees during the years of turmoil and the practice was discontinued after several years (Leung & Nann, 1995).

Chinese family care has been just one way but has been a reciprocal process. The popular Hong Kong saying that, 'Having an elder at home is like possessing a treasury' (Lee, et al, 2000) neatly encapsulates family appreciation of the contribution Chinese elders can make to the household workload. The elderly also function as carers within the family, particularly in the earlier years of old age when most of them are still quite healthy and active. Their services are very highly valued, providing them with a sense of self-worth and fulfilment and an important place in the community.

Aged women are likely to provide child-care services for daughters and daughters-in-law who work full time. Thus these family elders can be said to add to family wealth rather than subtract from it. Middle-aged and older parents who live apart from their adult children often take in grandchildren for extended periods of time, particularly from the age of six months to three when creche places are not available for infants. They may also look after them during weekends or weekdays and in special times of need (Yuen-Tsang, 1997). They take grandchildren to and from school and supervise their play and homework. In many cases Chinese grandparents provide more substantial care to grandchildren than parents do and also assume the bulk of everyday household chores. One reason they engage in all these activities is to make life more meaningful (Yuen-Tsang, 1997).

Some observers of China argue that state policies in the country since the era of reform have increased family interdependence since the family has been forced to draw more on its resources as welfare benefits have diminished and job security has

been lost (Davis, 1993; Wolf, 1985). Post-1978 reform economic policies have restored the role of the family as a unit of production and consumption. Thus responsibility for the support and care of the elderly has 'substantially reverted from the public sector to the family' (Lee & Xiao, 1998). Certainly there is no official desire to assume a greater obligation for the aged than necessary so long as the family can continue to function as a self-contained unit in terms of ensuring adequate support for all its members.

Although Confucian values were condemned as anachronistic by the government of the People's Republic of China in its first few decades, they have been rehabilitated in recent years as an expression of a special Chinese culture that deserves to be a focus of national pride. The socialism with Chinese characteristics espoused by the ruling Communist Party incorporates a respect for 'the nation's excellent traditional culture' lauded in a 1991 speech by Jiang Zemin (China in brief, 1993). Family responsibility for care of the aged has been reinforced by state laws and regulations, including the national constitution. Recent new regulations have been seeking to bolster the role of the family and public awareness of familial obligations.

While filial piety remains a moral paradigm of Chinese culture the elderly do not always receive the care they feel is their right. There have been growing instances of elderly parents being abandoned by their offspring in the wake of the new economic climate. The 1996 law of the People's Republic of China on human rights and social security for the aged (CIP, 1996), the first for the nation, aims to prevent and punish maltreatment of the aged by their children. Even though its sanctions are rarely implemented, the few cases given publicity in the media may bolster the legislation by making it more widely known (Xiao, 2000). It follows on from the 1979 criminal law which allowed for a maximum prison sentence of five years for denying support to aged family members (Chen, 1996).

The second section of the 1996 law states that care of the aged rests principally on the family and that family members must give both psychological and financial support. Areas where the rights of the aged are protected include remarriage (CIP, 1996). The new marriage law includes a proviso that grandchildren must shoulder responsibility for grandparents if their own parents are deceased thus extending responsibility further down the family line.

In Chinese tradition, the principal responsibility for the needs of aged parents rests with sons. Liu (1998) and Chen (1996) assert that this crucial importance of sons means that the Western equation of aged care with female care should not be applied to Chinese culture. In a 1994 survey on family support for the aged in China 60 per cent of respondents saw sons as the main providers of financial help for aged parents, with 31.4 per cent looking to daughters (Liu & Yang, 2000). Chinese women contribute a great deal to practical day-to-day tasks of care for the aged but the family as a whole shares both physical and psychological aid, with the latter regarded as crucial. In turn, older Japanese regard the love and affection given by family carers as more important than their financial support (Kono, 2000). A study in the southern city of Guangzhou, an economic growth leader in China, reveals caregiving does not fall on a primary female caregiver but is spread across many members of the family. When an elder is frail a younger person in the family will come to their assistance (Yu et al, 2000).

Women do continue to perform the bulk of care and other chores within the home. They see their meaning as existing in doing things for other people (Wolf, 1985). The few studies done of division of household labour in China conclude that, although Chinese men no longer stick to the tradition of men not engaging in household work, Chinese wives still carry out the vast majority of traditional female tasks (Lu et al, 2000). They look after the bulk of provision of meals, cleaning and washing of clothes and bedding. Liu (2000c: 12) acknowledges that it is nearly always a woman who assumes 'primary tasks in providing support for older people in the family.' It is much more difficult to measure the less tangible means by which family provide a congenial environment for their elders and give them a sense of satisfaction in their daily lives.

The care the aged give to their contemporaries through activities in the community can provide them, in turn, with a sense of worth. New forms of participation are emerging. Interest has arisen in China in a Japanese developed 'time bank' under which the able aged provide services for others on the proviso that they receive similar services in return when they need them. Residents of Tianjin have shown interest in participating in this new type of scheme for China, if government and neighbourhoods can help organise it. They see it as better than having money in the bank since even people with ready cash are not always able to find a suitable carer. However, worry exists that the pervasive influence of the market economy might terminate the scheme before participants might be able to draw on entitled benefits (Du, 2000).

City residents have also expressed concern that social disapproval of such a scheme could lead to loss of face. Such worries have led to families assuming care for their aged rather than look for outside help, but demographics and the market economy could reverse this tendency. Paid carers may become more socially acceptable as shrinking families no longer protected by work unit welfare benefits find it increasingly difficult to find the time needed to meet the needs of their elders.

The place of professional carers is still in a state of transition for historical reasons. The profession of social work was denounced as a manifestation of exploitative Western capitalism by the communist government that assumed power in 1949. Social welfare institutions run by mainly Western Christian missionaries were closed as were courses in social welfare at the universities. College courses were recommenced only in the 1980s with reform (Ngai, 1996). They seem to have not yet had any great impact on aged care. Textbooks for students in Chinese universities, however, do appear to draw heavily on Western models of social work (Sun, 1999; Zhang, 1997; Wang, 1999).

The media acknowledge the lack that exists of specially trained community workers. As the *China Daily* pointed out in late 1997, 'most of the people devoting efforts to community service are concerned retired people in the neighbourhood, student volunteers and laid-off workers' (Zheng, 1997). The government wants to encourage more participation. Guidelines released in 1986 for national development asserted, 'We shall continue to foster the fine tradition of mutual assistance among relatives, friends and neighbours' (Chow, 2000: 65).

Social welfare and other services for the elderly lack attraction as sources of jobs because they do not pay well. Young women from the poorest sectors of Chinese society are the most likely to seek such work. Live-in bao mu (or 'nannies') who provide another source of care for the aged in cities are mostly teenagers from the poorer provinces who can save some money on their meagre wages because they receive free board and lodging. However, quite a few city families lack the space to accommodate such carers even though they have enough money to pay them. In addition, most bao mu find that work with the elderly is 'dirty, boring and drains one's energy' (Yuen-Tsang, 1997:108). They prefer to look after children.

Many people are still reluctant to entrust care of their aged to hired help in China. The option may become more acceptable in the future as the tendency grows to concentrate on the nuclear family and employment makes greater demands on the time of individuals under the market economy (Yuen-Tsang, 1997). Moreover, many city people can afford to pay for services. Although urban Chinese may be much poorer than their Japanese counterparts, in relative terms they have much greater purchasing power for domestic help due to the wide disparity in incomes between the cities and the rural areas that supply helpers.

Community care has existed in China for many decades but for most of this time it has been directed at only the tiny minority of the aged population who formed the so-called three nos with 'no family support, no work ability and no means of livelihood' (Wong, 1998:48). Now this care is being aimed more generally at the populace as a whole by the neighbourhood street offices that handle the bulk of social welfare work in Chinese cities. These local government groups, which cover from 25,000 to 50,000 urban residents, hand down responsibility to resident committees for from 100 to 700 households. Social welfare subcommittees within the smaller groups identify areas of need and mobilise volunteers and neighbours to help in the care of the needy, including the aged. They also register marriages and promote cremation (Chan, 1993).

The majority of street committee workers are retirees who receive small stipends for their contributions. Thus community care equals care by the elderly in China (Chan, 1993). An increasing pre-occupation with moneymaking in recent years has fuelled fears that the supply of people willing to provide traditional neighbourhood self-help may eventually dry up (Chan, 1993). Personnel coordinating services within neighbourhood street committees have to date been of fairly low calibre. There have been some attempts to rectify the situation by recruiting younger and more well-educated staff. This, ironically, could put back the position of aged workers by making them less desirable.

Cadres in charge of welfare services are among the least educated and oldest of neighbourhood committee staff (Chan, 1993:166). In order to fulfil their roles they must draw on neighbourhood volunteers, relying on the tradition of people helping each other in times of difficulty. The mainly female volunteers join after statutory retirement age and perform the lowest level of duties. They tend to be involved long term and are identified by resident group as appropriate helpers who follow the spirit of serving the people encouraged by the state since 1949.

There may be strong social pressures on people to participate in neighbourhood work as their social duty but fewer are choosing to do so. In cities like Guangzhou, where

earning money to acquire a higher standard of living is paramount, the elderly are less attracted to voluntary work as post-retirement jobs become more available (Chan, 1993). In addition, many of the aged need additional income to maintain their standard of living as inflation lowers the buying power of their pensions. Street committees themselves have gone into business in order to fund their own activities. They have been running neighbourhood businesses both to generate income and absorb surplus labour, thus bolstering their role in the community. Welfare services thus now form only a small part of their overall responsibility (Chan, 1993).

The use of untrained staff and mobilisation of volunteers is 'the best that the PRC can do to increase welfare service outputs within a short period of time' (Chan, 1993: 157). The neighbourhood committees that perform this work often feature negatively in Western accounts of China since as agents of social control they maintain tight surveillance over the lives of citizens, such as by keeping records of menstrual cycles to ensure women do not have more than one child (Wong, 1999). Their positive role of identifying residents in need of assistance, such as the aged, has been overlooked.

The Chinese government has been also encouraging remarriage by older people as a way of getting them to look after each other rather than rely on the state. Matchmaking services for the elderly have become very active in China despite a traditional social aversion to remarriage, especially for women. Beijing, for example, had 11 registered marriage introduction centres for the aged in 2000 (Zheng, 2000). Neighbourhood street committees organise parties and gathering to provide opportunities for the aged to meet suitable partners (Chan, 1993). Moreover, the official media publicises cases of remarriage in order to make it more socially acceptable.

This is a hard battle since it represents a major turn away from the Confucian mores under which a widow was expected to remain chaste for the rest of her life as her remarriage would plunge the family into disgrace. Prejudice against widows remarrying lingers into the era of reform (Wolf, 1985). However, women in the 80-plus age group, who are the more likely to need physical and fiscal assistance, are unlikely to be able to find another spouse anyway as they considerably outnumber men in their age group. A 1998 survey found 89.5 per cent of them in cities to be widows (Liu, 2000a). This figure could be reversed in coming decades in China as the much higher proportion of male to female children among the one-child generations could result in many men being unable to marry at all and thus lacking spouse or offspring support in their later years, let alone having the chance to remarry then.

CONCLUSION

Traditionally the family has provided the essential care for the aged in East Asia. Only those individuals not possessing families have been forced to call on the state for assistance. This pattern no longer holds true, however, and future care may come increasingly from outside the family, including private and government services. While many in the present cohort of the middle-aged continue to care for and share homes with aged parents, they say they do not expect to receive the same treatment when they grow old. Smaller family sizes and the rapid ageing of the populations of both China and Japan mean there will be far fewer children to look after the burgeoning numbers of elderly over the new few decades.

One of the major dilemmas facing policy makers in both China and Japan well into the 21st century is how to ensure that their communities can provide enough carers to attend to the everyday needs of their ageing populations. Professional carers along the lines of those deployed in the West are slowly emerging but training programs for them are still in the teething stages. Families still provide most of the care and also benefit from the care the aged give to younger family members. Both countries face the challenge of reconciling the traditional human values they wish to preserve with the exigencies generated by the economic pressures of industrial society and global forces.

In this chapter I have examined the roles of carers for the aged in China and Japan. In the face of rapid demographic change that is resulting in smaller families, and far greater numbers of aged living into their eighties and beyond, the future of current patterns of care look uncertain. Female relatives currently remain the main carers for the aged, most of whom still live with their children but this pattern may not continue. Many middle-aged Chinese and Japanese indicate that they may prefer to live independently in their post-retirement years.

The Japanese government is putting in place structures that may enable families to hand over the responsibility for the care of their aged to professionals employed by the state. The practice of making all citizens over 40 pay mandatory contributions towards this long-term care scheme is hoped to break down the stigma that has existed to date of seeking state assistance.

Care for the aged in China is yet to be made a priority in social policy, with the onus still on the family to provide it. However, the rigorous enforcement of the one-child policy in cities may place unsustainable burdens on only children who have to look after several generations of family elders.

In the next chapter I explore employment of the aged in China and Japan, including its availability and the way it shapes their place in society and attitudes to life.

CHAPTER FOUR: EMPLOYMENT OF THE AGED: A WORTHWHILE JOB

INTRODUCTION

In this chapter I examine the background behind the employment of the elderly in China and Japan. Levels of aged participation in the work force in their cultures, which value the work ethic, are high and are compared to those in the West. However recent economic pressures have been threatening money earning prospects for senior citizens and demographic pressures are yet to result in their greater inclusion in the job market. Men, for whom work is pivotal in life, form the focus of policies on employment for older citizens while women are less visible. Motives for wanting to stay in the work force include a desire to be active, health, workplace relationships and money.

In Japan the government has promoted the employment of older people, setting up incentive schemes and placement centres for them. In China the policy of reform means that older people, along with other sectors of the population, can now engage in private money making ventures. Despite the existence of these theoretical opportunities, work remains hard to find in economies hit by rising unemployment. Predicted shifts that will sharply reduce the size of the working population if it stays within present age limits may result in more older persons working for longer. This remains an unknown quantity.

Care for the aged includes fostering a society where the elderly can maintain their economic independence and involvement in society through paid employment. Many people in China and Japan continue on with some form of employment after they retire at a mandatory age from a lifetime job. The new work is usually much lower paid and of lower status but keeps them in the work force. It also provides a source of satisfaction in these two cultures whose present elderly have been imbued with a belief in the virtue of work per se. Both come from backgrounds where hard work for the sake of the nation, along with a frugal lifestyle, was lauded when they started their working lives. However, attitudes to both work and age are changing in their societies. It cannot be assumed that the desire to work past retirement age will remain as strong in the future. Policy may need to change drastically to accommodate new attitudes to work among younger Chinese and Japanese from small families.

Levels of employment for the aged have been relatively high compared to those in Western nations. For example, in 1985 figures for men over 65 working were 37 per cent in Japan, 12.6 per cent in Australia and 10.3 per cent in the United States (Schulz et al, 1991). In recent times the number able or willing to continue working has dropped sharply in China and Japan as both have faced intense economic pressures and rapid social change. There has been an increased desire for leisure time among the larger cohorts of the aged who enjoy more years of healthy life after a set retirement age than their predecessors, most of whom did not live long past retirement. Future demographic pressures may bolster moves to provide greater work opportunities for the aged as the ratio of retirees to the employed shrinks drastically and tax burdens go up to accumulate pension funds. A decline in younger workers will theoretically put more pressure on the aged to continue working to fill gaps in the work force but this has yet to be demonstrated. The young remain the priority in the labour market and age discrimination is rife (Kyodo, 21 December 2000).

The incentives to continue working differ somewhat between China and Japan as a result of disparities in national demographic, pension and retirement situations plus need and capacity for certain categories of workers. Both countries do share a common concern to ensure that the aged can enjoy higher economic security and thus a secure old age. Although they both have mandatory retirement ages, these do not prevent resumption of work past their limits after formal retirement.

The present generation of Chinese aged, who have entered retirement since the 1990s, are materially worse off than their immediate predecessors. The latter received guaranteed meagre income and benefits that met the basic needs of life. Inflation has vastly devalued pensions and the dismantling of the system of cheap public housing has threatened security. Some retirees have even had benefits withdrawn or received no pensions as a result of enterprises becoming bankrupt or unable to deal with the sheer number of retirees compared to workers. All these factors have created greater pressure for retirees to seek paid work to maintain themselves.

Retirees in Japan enjoy a much higher standard of life and are much better off than their counterparts in China. Theoretically they should experience less financial need to continue working. However, their greater longevity means that their post-employment finances must stretch over a much greater time frame. The present generation of elderly Japanese are said to have a higher level of assets than the average Japanese and to be comparatively well-off. Most own their own housing (Takayama, 1997). Their desire to work is often motivated more by psychological than economic need.

What aged citizens in both countries share in common is a lack of sufficient paid jobs for all who want them. Their respective governments appear more concerned about the effect on the future economy of a lack of younger workers for the work force generally and as carers for the aged than with unemployment among senior citizens. The authorities are yet to devise ways to fully use the growing population of older people who still possess the capacity to make a worthwhile contribution to society and want to do so.

What public discussion there is about the employment problems of older people in both countries continues to revolve basically around older men with little thought for the needs of older women. The same applies to the effect of public pension schemes on women in Japan where more research is conducted on men (Nagase, 1999). This may be due to the persistence of traditional attitudes about the role of females being primarily in the home. Although full-time employment has been near universal for Chinese women under 50, with 96.1 per cent of women between 20 and 54 said to be in the work force in 1990, (Chen, 2000) scant provision is made to meet their desire to work over that age. Despite oft quoted assertions that women should enjoy full equality in China they continue to face discrimination in the area of employment both before and after retirement age. Women were singled out as specific targets for the massive layoffs of the 1990s (Croll, 1995). Government measures to foster employment for the aged in Japan target lifetime full-time employees of retirement age. Since few women fit that description as most are part-timers they are overlooked. It seems ironic that women, who live longer than men, are publicly

thought to fittingly have much shorter working lives than them, except as unpaid carers for the family either as housewives or grandparents.

China and Japan both depended heavily on enterprise based welfare systems in the post World War II decades of the 20th century. These systems have been breaking down in recent years and losing the influence they once possessed. In Japan this has been a result of corporate rather than government decisions. In China, where the central government formerly funded pensions regardless of whether an enterprise was in the red or black, state-owned firms are now responsible for payrolling benefits. Consequently, older businesses that are top heavy with retirees can no longer guarantee full pensions and their aged ex-employees need to look for other sources of income.

In Japan the recession years of the 1990s that followed the boom 1980s led to a reversal of the previously strongly entrenched corporate policy of retaining all staff regardless of downturns. Thus employees, who were previously regarded as a precious and loyal resource to be retained, have recently begun to worry about their job security. The global trend to downsizing has finally struck Japan. Older staff members are the logical first to go if costs are to be cut as they enjoy much higher salaries under the age seniority system but are perceived as having a declining ability to learn new skills. They are more vulnerable than other age groups to fluctuations in the economy when it comes to the workplace (Sakamoto, 1997). The system of lifelong employment is being eroded. In China it has already disappeared, with the practice having been officially disbanded by 1995 (Lee, 2000a).

In the area of government policy, both countries have recently incorporated the responsibilities for employment, pensions and health under the one ministry for the first time. In China's case, a newly created Ministry of Labour and Social Security dating from 1998 is seeking to reform pension structures (*Trends in Social Security*, 2/1998). In December 2000 the new Ministry of Health, Labour and Welfare in Japan merged the ministries of Labour and Health and Welfare. The stated target of the new Japanese ministry is 'the promotion of comprehensive policies to deal with a shrinking population' and 'the realization of vitality within an aging society' (*Japan Labor Bulletin*, 2001). The move is part of a general reduction in the number of ministries to slim down administration staff and costs.

In China and Japan, where lifelong jobs are common, work has formed the main framework for social bonds formed in adult life outside the family. In the West, where job mobility is higher, individuals tend to have a wider range of relationships beyond the confines of work and are less likely to see the workplace as a prime source of long-term links. Tang and Parish (2000) comment that in the 1980s people in urban China were more likely to list co-workers as close friends than their counterparts in other countries. In China the 'workplace doubles as a community' (Chan, 1997) where colleagues are also neighbours. The cessation of employment and subsequent loss of daily interaction with colleagues of many decades and reduced opportunity to create new relationships that occurs after retirement is one major factor inspiring the aged to seek re-employment in China and Japan. Money is also a crucial component in China for retirees who face a greater threat of poverty than their counterparts in Japan.

Varying attitudes of the aged to work in the two cultures are thought to result from different views of the relative importance in life of family relationships. According to Lu (1995), asked what is most important in life a Japanese will answer work while a Chinese will respond that it is family. He cites this as major difference between the two cultures. However, belonging to a workplace remains an important form of identity for individuals in both countries who invariably introduce themselves by the name of their firm or work unit before mentioning their own name. Work is a pivotal point and the loss of it is thus a major turning point in life.

JAPAN

In Japan over the last half century or so full-time work has been the norm for men while the main responsibility for their wives has been household duties. In China over the same period both men and women worked full-time up to retirement age under a regime that glorified work as an act of 'serving the people.' Despite this difference the two societies have displayed similar patterns in the post-mandatory retirement years where choices to resume work have been more open to men than to women. Studies of older Japanese workers invariably focus on men and their reasons for choosing to work. They ignore the narrower options open to women who are more involved in volunteer community work and family duties.

The decision by men to continue working rather than retire often involves taking up a lower position at lower pay in a subsidiary of their corporation. It can also mean loss of some former perks (Ogura & Takagi, 1999). The literal meaning of the term 'teinen' for retirement in Japanese of 'age limit' (Nelson, 1979: 159) often signifies 'the end of one work career and the start of a new one' (Spark, 1975: 74). 'Teinen' does not always equal an effective end to the working life as it does in the West. It also does not parallel the Chinese equivalent where, till recently, volunteer activities and family help have been the main outlet for retirees. Retirement in Japan can mean just the end of one stage of the working life before embarking on another stage of it, albeit one with lower status.

The question of how to spend the sudden amount of free time stretching ahead as retirement looms is a very real dilemma for Japanese men. Many are at a loss over what to do with themselves once they retire. In the words of one such man, 'Although I am soon to greet retirement, I do not know what to do then as for a long time I have led a life to do with work. What sort of spirit do I need for the next 20 years of life?' (Inoue, 1997: 1). There are many men like this individual for whom the prospect of every day of the week being like Sunday is mentally and physically draining. They see work as a desirable activity and subsequently do not look forward to it ending. This may partly explain why Japan has much higher rates of employment in the over-60 age group than most developed countries. In a country where time off has been seen as an opportunity to recharge physical and emotional batteries for the next day's work rather than for private valued pursuits (Spark, 1975) the leisure afforded by retirement has not been highly valued.

Japanese government policy of raising the retirement age to reduce payouts on pensions has been partially driven by the expectation that the decline in the younger working populace would prompt greater employment of the aged. It has not taken proper account of the reality that employers continue to target the young as potential

employees. Reforms implemented in 1994 introduced partial pensions for 60- to 64-year-olds working reduced hours on the basis that people in this age group should be able to live on a combination of job earnings and pension benefits before reaching the new pension age of 65 (Nakamura, 1996). From 2001 to 2013 the mandatory retirement age in Japan is to be raised in stages from 60 to 65 for men, with a comparable rise for women slightly behind. Subsequently the minimum age for receiving pension benefits will be gradually increased from 60 to 65 between 2013 and 2025 for men and from 2018 to 2030 for women (*Asahi Shimbun*, 26 February 1999).

Consideration given to designated retirement ages over the past decade or so has been driven by concerns over forecasts of projected rising future ratios of dependants to workers in the light of low birth rates and increasing longevity. This overlooks the well-documented fact that many of the aged in the non-working population are not a burden on the economy since they remain economically self-sufficient. Ferries (1996) says that the belief that the elderly are an economic drain on state resources is not correct in Japan due to the high labour force participation rates of people over 60. He argues that a better way to judge the rate of dependent citizens is to divide the productive population by the aggregated dependent population, taking into account the falling birth rate.

The spotlight is on the implications of a projected decline in future worker numbers in Japan as the nation ages. Ohbuchi (1997) judged that around the year 2000 the working population would peak and then start to decline, leading to the subsequent unavoidable feminising and ageing of the work force to fill in the gaps. He noted that extra pressure would be placed on women who would be both expected to raise children for the sake of the nation and also to work full-time to make up for the labour shortage.

A United Nations March 2000 report predicted that, to maintain its 1995 ratio of 4.8 workers to one retiree in 2050, Japan would have to accept 10 million immigrants annually or raise the mandatory retirement rate to 77. The paper added that, if current trends continued unchecked, by 2050 there would be a ratio of 1.7 workers to one retiree. It suggested that the mass immigration of foreign workers would be the only way to redress the imbalance. As an example of imminent changes in the age balance of the work force the report estimated that the number of workers aged between 15 and 29 would decrease by four million by 2010 while the number aged 55 or older would increase by 3.8 million (*Asahi Shimbun*, 23 March 2000).

The present age structure of the work force appears unsustainable as massive changes occur to the demographic mix of Japanese society in the 21st century. However, assumptions that employment of older workers will grow as the population ages more rapidly are yet to be proved accurate. They appear to overlook the fact that, as Japan contemplates an impending labour shortage problem in a decade or so, available work for the soaring number of aged has been dwindling. Even the middle-aged who formerly enjoyed job security have lost work since recession hit Japan in the 1990s. About 80 per cent of prominent Japanese-based enterprises have implemented early retirement plans. Unprecedentedly, they have been offering redundancies to workers in their thirties and forties, on the grounds that they can find new jobs easier, although redundancy formerly was an option reserved for staff in their fifties or older

(Watanabe, 2000). This phenomenon has happened in only the last few years which have seen a sharp increase in suicides among middle-aged men (*Japan Times online*, 18 August, 2000).

The targeting of the middle-aged runs counter to former corporate practice during restructuring. Traditionally companies have been reluctant to lay off this group, preferring to dispense first with higher paid but ostensibly less productive older workers before their pension payouts burgeoned too greatly (Takada, 1993). The practice has also enabled promotion for younger staff in a society where age hierarchies have been firmly entrenched (Schulz et al, 1991). However, although lip service is paid publicly to the social benefits of later retirement, economic forces are compelling the earlier retirement of more workers, moving in the opposite direction to professed government aims for employment trends. Age constitutes a barrier to employment. A labour force survey done in August 2000 of unemployed found 50 per cent of those aged 45 to 50 and 60 per cent of those aged 65 and over cited 'age mismatch' as the main reason for their failure to obtain jobs (*Japan Labor Bulletin*, 2001: 4). More than just the will to work is needed to obtain a job.

Japan does have an advantage over European nations in terms of pensions and retirement in that a substantial number of elderly Japanese want to work whereas most Europeans aspire to an early retirement (Yashiro, 2000). It is questionable whether this will hold true for future generations since societal attitudes to work are altering. Younger Japanese seem less tied to the work ethic. Motives among the Japanese aged for wishing to continue to work are varied. They go beyond just earning money to sustain a comfortable standard of living, reflecting the importance that work plays in the lives of Japanese in terms of both relationships and occupation of time.

For many male company workers, in particular, leaving a job also entails leaving behind close links with workmates formed over long working hours and after work socialising (Takada, 1993). Following decades of leaving home early in the morning to commute to their company and often arriving back late at night, their own families may be like strangers to them. Such men suddenly find themselves cut off from their accustomed sources of personal support and companionship when they retire. They do not know how to maintain relationships with people outside the company milieu (Ogura & Takagi, 1999). They are concerned about their families, however, says social commentator Higuchi (1999). She wryly notes that, while in the past middle-aged and older salarymen used to talk about their bosses and women in bars after work, they now complain about care of aged parents and exchange information on good hospitals.

The motives of aged Japanese who wish to keep working vary considerably. According to Takada (1993), older workers can be divided into three groups. The members of the first group, who comprise one-sixth of the total, want to be active or contribute to society or they simply enjoy working. This work ethic group is well educated. They work full-time and have the highest satisfaction with their jobs. They usually are in the managerial or self-employed categories.

Those in the second group, who comprise one-fourth of the total, work for reasons of health or because they lack alternative fulfilling leisure activities to take up their time. Many older Japanese believe that working is good for the health. Personal vitality is

associated with work, the idea being that the person who puts in effort on a job is less likely to become ill (Spark, 1975). A 1980 Tokyo survey of older men on their feelings toward work after retirement found that an overall 66.1 per cent wanted to work until their health failed them (NIRA, 1983). Men in this group also see work as a good way of making friends. They have been socialised to spend time off the job with colleagues in order to foster corporate spirit and long working hours have limited their time for other relationships. They are uncertain how to approach other men outside the formal role sets through which they have previously functioned on the job (Kinoshita & Kiefer, 1992). The majority in this so-called 'health and leisure group' are part-timers in non-managerial positions in larger companies.

The third group, who also comprise one-fourth of the total, continue working principally to earn money and not for job satisfaction. They tend to be full-timers and are the least well-educated and well-paid of the three groups. Takada (1993) calls the remaining one-third a marginal group but does not elaborate any further on their characteristics.

The very diversity of potential aged workers has hampered the creation of work programs for the over-sixties. Some individuals want no change to the pattern of their existing work while others want to work part-time; some wish to simply continue what they are doing and others desire to switch over to lighter work. It was assumed up until the effects of recession set in during the 1990s that the aged thus formed a more varied group than younger Japanese workers who all desired secure long-term jobs (Campbell, 1992).

Challenging this assumption is the recent trend for more of the young to want to work in part-time jobs that lack the security their elders have prized as so-called 'freeters', a word coined by combining 'free' and 'arubaito', the Japanese word adopted from German to signify casual workers (*Mainichi Daily*, 29 June, 2000). An annual white paper of the Ministry of Labour (2000) has highlighted the implications of the 'freeter' phenomenon and the ratio of middle-aged and older workers in an aged society. It pointed out that a decade later the number of workers between 15 to 29 would be down by four million while the ranks of workers over 55 would be up by 3.8 million (Ministry of Labour, 2000). The postwar baby boomers would then need to work up to the raised pension eligibility age of 65. Consequently, big changes would be essential to fill jobs formerly done by the young and to ensure adequate income for the aged.

To date the aged, like 'freeters', have chosen to find work outside the major corporations that used to be the first choice of the majority of job seekers in Japan. Self-employment, jobs in smaller unrelated firms to their own and re-employment by former employers in subsidiary companies (Schulz et al, 1991) have provided the main avenues for the mandatorily retired resuming a working life. Future trends are difficult to predict in the light of demographic changes.

Comparing Japan to other industrialised countries Campbell says, 'Efforts to help older people work are the most unusual aspect of Japan's policy toward the elderly ... Only Japan pursues a consistent positive policy of job maintenance and creation for older people' (Campbell, 1992:254). State policy has not ignored the needs of senior citizens for employment nor has it downplayed them. Since the 1970s Japanese

government departments have been actively trying to devise policies that will aid the elderly who want to work. They have seen a need to enable citizens to bridge the financial gap between mandatory retirement and public pension eligibility age (Schulz et al, 1991).

Over several decades the Ministry of Labour has been the most active ministry after the Ministry of Health and Welfare in moves to advance conditions for the aged (Campbell, 1992). It has stated that, 'to maintain vitality in Japanese society in the 21st century, it has become an urgent task to make the best use of the strong will to work among older persons' (Ministry of Labour, 1998). The ministry has improved the flow of manpower demand and supply through a number of measures. These have included appointment of experts specialising in vocational guidance and employment of older persons; production of videos of job applicants; vocational counselling and job placement. In recent years subsidies have been granted to employers who set up systems of paid sabbaticals for workers to enable them to prepare for another career in old age.

New initiatives specifically designed for older workers and retirees continue to emerge. In February 2000 the Ministry of Labour introduced a scheme to provide support of up to five million yen for groups of three or more entrepreneurs over 60 starting up new businesses. The subsidies cover mainly rent and equipment but can also go towards training for vocational licences. The ministry will run seminars for participants on the basics of setting up and managing a new enterprise (*Asahi Shimbun*, 2 February 2000).

Small regional groupings are moving along similar lines. For example, a collaborative effort between Waseda, a leading Tokyo private university, and the local merchant's association is offering support to retirees or the middle-aged who begin new enterprises. Their non-profit organisation links academic and business expertise. It can provide access to vacant business properties but not funds. Instead it aims to give advice to help entrepreneurs in the initial stages of a new venture so they can avoid financial failure (*Asahi Shimbun*, 17 January 2000).

In the year 2000 unions added jobs for older workers to their annual demands at the spring wage negotiations. Both the government and unions are warming to the concept of a more flexible employment system that enables employees to stay on the payroll longer as the age for pension eligibility rises from 60 to 65. The unions of most major electronics companies have considered proposals to extend the retirement age to 65 and provisions for rehiring of already retired workers. The Japan Federation of Iron and Steel Workers Union has asked for implementation of half-time work under which older employees work only every other week or three days a week (*Nikkei Weekly*, 17 January 2001). This could help workers who would otherwise leave the work force to continue earning some income. Nevertheless, the government decision in 2000 to make workers aged between 60 and 65 start paying pension contributions from which they had been previously exempt might discourage such part-time work.

These efforts to relax previous inflexibility in the workplace might seem to indicate that the needs of the aged are becoming more prominent in society. However, they are more crucially linked to attempts to relieve the future economic burden the aged may

place on society by making them more financially autonomous and shortening the period of time they draw on pensions. As Campbell stated nearly a decade ago, when the problem was not as pressing as now, the 'Labour Ministry's specialized problem about unemployment over age 55 and society's general problem of too many dependent elderly would both be best solved by workers retiring not so young' (Campbell, 1992: 263).

Some specialised centres do exist for the aged wanting paid employment. The Silver Centres, which originated at the local government level in Tokyo in the 1970s (Campbell, 1992), as did free aged health care initiatives, constitute a major Ministry of Labour policy. These municipal operations look for temporary part-time jobs for people over 60, thus posing no competitive threat to regular full-time workers. The part-time worker receives an hourly amount that the job orderer pays to the centres which also aim to give training in new skills (Campbell, 1992).

The centres offer a lower level of employment for applicants than the state aged employment centres for professionals in China described later in this chapter. The Silver Centres principally provide quite menial jobs such as cleaning and bicycle park attendants. As such, they have failed to appear relevant to many retirees with higher aspirations (Campbell, 1992). They do hold quite lofty ideals, however, including using the rich experience of elderly members to the fullest (Schulz et al, 1991). The readiness of Japanese workers to move from one type of job to another in their offices or factories has been said to mean they have the flexibility well suited to schemes such as Silver Centres (Schulz et al, 1991).

Greater employment prospects for the aged could also serve to provide them with a more positive image in society. A magazine put out by the Silver Services Association in the year 2000 commented that the aged have been seen as weak and in need of care, acknowledging that silver services, which aid the aged, have held the same viewpoint. Thus they have concentrated on the frail aged rather than on enhancing the lives of more active seniors. The theme of the magazine was that, as society becomes more complex, new services would emerge that are more positive in their attitudes toward the elderly.

Maruo (1986) hypothesised that the ratio of the labour force to the population overall could be maintained at its existing level through to 2010 if participation by the aged did not decline much and participation by women increased. At that stage about 48 to 49 per cent of the population was classed as employed. He predicted that this figure could rise even further if a larger number of women than anticipated entered the paid work force. He rationalised this on the basis that Sweden, with a more aged population than Japan, had an even higher sustainable ratio of aged to the work force. More women have since entered the work force, including many as carers for the aged, but pessimism seems to still prevail. Ideas such as those of Maruo seem to have been forgotten in recent years as the alarmists have held sway with predictions that more aged mean far fewer workers and more people to be cared for.

In the 1990s the Ministry of Labour pressed for an 'age free society' in the area of employment to account for decreasing birth rates and rapid ageing, despite formidable barriers imposed by industry age limits. A 1999 ministry survey found that the average upper limit for taking on new workers was 41.1 years. Only a small number

of jobs, such as taxi drivers, security staff, insurance salesmen and cleaners, were available for people 50 and over. Ordinary office work, programmer, PR and editorial positions were reserved for individuals in their thirties or younger (*Yomiuri Shimbun*, 6 February 2001). The difficulty of finding a different job after a comparatively young age has been a major factor in maintaining a society where life-term employment with the one firm has been the desirable social norm. While a lifelong position can no longer be guaranteed, fixed ideas about suitable ages for entering and leaving work continue to impede choice within this group oriented society.

Paid work is not the only source of active involvement in the community open to the elderly. Volunteering has been on the rise since the 1995 Kobe earthquake. Shock at the news of the disaster and official ineptitude prompted a great deal of volunteer activity. Many Japanese say they do volunteer work to help the aged because they have lost faith in the government, seeing a need for self-help as a substitute for a lack of delivery of state services (Suda, 2000). Moreover recent changes to the lifetime employment and seniority-based wage systems have decreased the importance of the sense of belonging to a firm and increased the trend to seek life satisfaction outside the workplace according to a recent government white paper (Economic Planning Agency, 2000).

Retirees make up slightly below 20 per cent of volunteers while housewives account for over 40 per cent (Economic Planning Agency, 2000). The higher participation rate for men once they reach their sixties seems quite natural since this is the first time in their lives many have the free time to engage in such activity. In 2001 the new Ministry of Health, Labour and Welfare launched a volunteer support project with an eye to getting employees involved in a new area of interest in the local community. An official explained that the ministry hoped that by thus broadening their outlook participants might enjoy a higher quality of post-retirement life (*Nikkei Weekly*, 18 June 2001).

The healthy aged can work toward ensuring care will be available for them in the future. A new style of volunteer work that is becoming popular in Japan pays volunteers with credits they can later exchange for services from others when they in turn need help. The Nippon Active Life Club, which operates nationwide, employs this so-called time bank system. The non-profit organisation targets older citizens for the work under the slogan, 'Humans do not have a retirement year' cited in their promotion pamphlet. After paying a small joining fee of 4,000 yen, participants can register their specialty. A wide total of 66 categories include not only standard care services but also popular hobbies and sports. The group advocates volunteering as not only a way of ensuring services for oneself in the future but also of staying healthy (Nippon Active Life Club, 2001).

Similar systems are catching on in some parts of China, inspired by the Japanese example, but seem to be centred on care giving rather than other social activities (Du, 2000). This may reflect the more practical Chinese attitude to life that values practical services over more nebulous cultural style activities.

CHINA

Chinese workers, unlike their Japanese counterparts, have not commonly been portrayed as workaholics in the Western media. However, the present cohorts of aged in both countries share an upbringing imbued by a stress on the value of the work ethic and duty to the nation that has shaped their attitudes to work and retirement. The state exhortation to 'serve the people' glorified work as an end in itself in China for several decades until Deng Xiaoping diluted its impact by announcing that 'to get rich is glorious' in the 1980s (Baum, 1996).

Although the employment patterns of the aged in China have diverged from those in Japan over the postwar period they are now drawing closer with the expansion of market reforms and dismantling of state welfare in China. While Japan pursued a path of capitalist development under which the most highly desired jobs were in private corporations, China adhered to a strict socialist structure under which urban residents all worked for the state. Up until the era of reform, as the sole employer the Chinese government decided when people should retire. In Japan retirees had the freedom to start businesses for themselves.

The present mandatory retirement ages for state urban workers in China of 60 for men, 55 for white-collar women and 50 for blue-collar women were set in the early 1950s when life expectancy was much lower than today. The average life span then was only 61 for men and 63 for women (Gui, 2000). Over the first few decades of the People's Republic of China retirement numbers were negligible compared to the size of the working population and the government could easily afford to pay pensions which came out of official funds. Pensions were set at high levels compared to salaries and a system of benefits that people came to regard as a right was set in place for a populace formerly forced by poverty to keep working until they died. Earlier only the tiny minority with more affluent families could afford the luxury of being looked after in their final years.

Working life and retirement have changed dramatically for the urban aged in China since the beginning of the era of reform, just as they changed remarkably with the coming of the Communist Party to power in 1949. In the earlier period of the new regime the introduction of universal employment in the cities resulted in greater livelihood security for all levels of the population and the innovation of pensions for retirees, a new breed of individuals. Since the start of the later period life has become more uncertain with the dismantling of enterprise welfare. Retirees have seen the value of their pensions plummet and the slow wind down of their retirement dues has threatened their financial security. In both cases, the changes introduced by the government have been officially justified as fitting the needs of the nation.

Reform may have resulted in greater prosperity for the nation overall but it has not benefited all sections of the population. In 1982 Deng Xiaoping said there was no hope for the country's primary goals of the four modernisations if older workers were to continue blocking the way for young workers and the talented. He pointed to this as a key national problem that needed to be solved (Liu, 1999). Young workers were to be considered more valuable since, being at the beginning of their careers, they could be more easily trained in the technical and intellectual skills China needed to advance

in the world. The underlying inference was that older workers could not adapt to such demands. Conversely, the years since then have seen a rise in the numbers of retirees having to seek paid work after retirement. They must do so in order to survive in a society made more competitive by the market reforms that Deng introduced.

Until the 1980s all China's urban citizens were allocated a permanent job by local officials after they completed their schooling (Leung, 1988). The aged who retired from government work units under this system enjoyed quite high incomes in comparison with younger workers. Salaries increased with age as in Japan, with pensions based on final pay at retirement. Retirees were able to lead relatively secure lives with all their basic needs accounted for. A few deemed to have special skills continued to work for their work units after retirement but most did not resume any form of paid work once they retired. Moreover, since all jobs in the cities were under the control of work units, and private entrepreneurship was illegal, they could not resort to alternative employment to supplement their pensions.

Rising inflation has sharply lowered the buying power of retirement pensions since then. While reform has gradually eroded the social benefits formerly taken for granted, such as cheap housing and free health care, it has also allowed the resumption of private enterprise. Thus, the many aged who are eager to find ways to earn money in order to maintain and/or raise their standard of living are now free to do so. The overall high figures for work beyond retirement age in China reflect the large numbers of rural agricultural workers in a country where urbanites account for only around 36 per cent of the population (Cartier, 2001) although their numbers are on the increase. Many rural workers can never afford to retire unless they receive substantial support from their children. Their urban equivalents, on the other hand, begin work early and then are forced to quit at a comparatively early age when they reach official mandatory retirement age and are eligible to receive pensions.

The possible raising of this age is leading to disquiet about the sheer weight of people involved in any envisaged changes to policy. One projection based on figures from the third national census estimates that the number of workers would grow by over 3.6 million if the retirement were to be raised from 60 to 61 and by nearly 10 million if it were to go up to 64. This, the study says, would merely aggravate the problem of finding enough jobs for younger workers (Wang, 2000). Such a conclusion ignores the prerogative of the aged to seek to work. It also illustrates how the lower percentage of aged in China compared to Japan has resulted in different attitudes to employment of the young and the aged. While Japanese policymakers worry that there will not be enough young workers to fill all the jobs required to maintain living standards in the near future, Chinese policymakers continue to worry that there will not be enough jobs to go round for all the young.

Surveys held among the aged in the 1990s have indicated overall less interest in work after retirement among urbanites in China than their Japanese counterparts described earlier. However, the ratios have been similar for those with relatively high rank positions. In both countries they have displayed a much greater desire to remain employed than workers from the lower echelons.

Motives for wishing to continue working may be similar to those in Japan but have a different weighting according to a 1998 Shanghai survey. Professor Gui (2000) cites

the main reasons in that city as being compensation for living standards at 51.9 per cent, making life meaningful at 29.6 per cent and health at 9.3 per cent. Shanghai has been a major source of surveys on aged employment as it has by far the nation's highest percentage of the aged (Xu, 2001).

The health effects of work are cited by many other surveys according to Wang (2000) who says they also show that older people who work are happier than their non-working counterparts. However, an assertion that the fact that death rates are lower among workers than retirees demonstrates the health effects of work may overlook the fact that people in better health are more able to take up paid employment anyway. People in poorer health are less likely to seek out new jobs in old age.

Neighbourhood street committees that provide services for the aged are a major source of jobs for retirees who have staffed them as elderly volunteers. These organisations operate programs in cities like Shanghai under which individual households contribute a small amount each month for services that include window cleaning, garbage disposal, maintenance of recreational facilities and haircuts. In return workers receive subsistence level pay (Ericksen & Hsieh, 1998). They also engage in a range of other activities for the community, including settling domestic quarrels, overseeing local clinics, finding jobs for youth and organising neighbourhood security patrols (Wolf, 1985). In the 1990s the amount they earned added to their pensions could exceed the income of a young full-time employee on only a monthly salary (Chan, 1993).

The small ranks of aged intellectuals, and particularly scientists and engineers, are in great demand. They have a much greater chance of gaining interesting and remunerative work than the vast majority of average aged workers. Their high value results from a lack of successors in the generation below them whose education was disrupted by the Cultural Revolution (1966-1976). Thus the use of the potential of elderly professionals is especially important for China compared to other countries according to Xiao of the Gerontological Society of China (Huang, 1999a). Japan, having been through no such disruption, does not suffer from a comparable shortage, and so does not have the same need for its aged intelligentsia.

The China Federation of Old Scientists and Technicians said in 1999 that 20 per cent of the 4.06 million Chinese scientists and technicians were older than the official retirement age of 60. A sample survey had found that 70 per cent of them were in good health and able to work. A quarter of the retirees were working and a national information centre was being set up to pinpoint places where other retirees could resume their professions (Huang, 1999a). By 2002, all graduates from the pre-Cultural Revolution era would have retired, leading to a gap of over 10 million scientific experts. The period from 1990 to 2000 saw a lack of 7.5 million needed workers with college education or vocational training (Huang, 1999a).

Other workers who do not offer specialised skills are not highly valued and many are being forced out of the workplace prematurely. Thus the age of retirement is actually going down rather than up as the population ages. Forced retirement before the set mandatory retirement age has become a phenomenon of the era of reform. Some state-owned enterprises have chosen early dismissal of senior staff as a way to streamline their organisations and alleviate financial burdens despite government opposition to

this practice. It is, as Zheng (1998) notes, an infringement of the legal right to work enshrined under the Chinese constitution. However, he also concedes that it has been a less painful and controversial method of cutting down worker numbers since those who are dismissed can receive pensions. They also continue to receive many other welfare benefits from their work units in many cases. The option to retire early is a recent initiative available to those 50 and over with 20 years of service and those under 50 with longer service for reasons such as family problems, illness or stress (Liu, 1999).

Under state law some firms that go bankrupt are allowed to ask their staff to retire early while they can still enjoy welfare benefits since, if they hang on to the statutory age, funds may not be available for them (Zheng, 1998). Women, in particular, have been forced out of the work force at ever younger ages, with 45 instead of 50 being the retirement age for many factory workers (Yuen-Tsang, 1997). The success stories of a few who have managed to build careers in the aftermath of dismissal may have been headlined in the media but they have attracted attention because they are atypical (Ericksen & Hsieh, 1998). The plight of the majority of women who cannot find work again has been ignored. Moreover, it is commonly believed that it is easier to force women out early as they tend not to kick up a fuss as men do but put up with their lot (Chen, 2000). It is not easy to push Chinese women out of the work force, however. In the 1980s Japanese women's domesticity was cited as an example for Chinese women to emulate but this did not result in large numbers of homemakers (Wang, 2000b).

Women who retire prematurely often take on the tasks of caring for grandchildren or older relatives and doing household chores for relatives with whom they live, thus relieving the burden on their children and the state. Some are happy to do this as they feel they are still performing an important role.

Cultural influences play an important role in the ability of aged Chinese to elect to stay in the work force. Respect for age in Chinese culture does not necessarily correlate with respect for the ability or right of aged Chinese to work. Chiu and Ngan (1997) argue that the cultural blessings of traditional Chinese reverence for elders have prevented elderly people in Hong Kong from working beyond retirement. They cite a recent study of public attitudes to older Chinese people in three Chinese communities of Hong Kong, Guangzhou and Toronto in which 87 per cent of Guangzhou respondents agreed that older people should cease work and should retire.

Filial piety results in 'a false assumption that those who work beyond the common retirement age of 60 must be doing so due to the fact that their children (usually sons) are not filial enough to offer the needed support' (Chiu & Ngan, 1999: 27). In turn, the elderly in Chinese society gain social approval and status through being dependent on their adult offspring (Hong & Liu, 2000). The fact that they work may affect the reputation of the family. Although Japanese society does not seem to possess such a strong antipathy to the aged maintaining themselves independently through work, its treatment of the bedridden, described elsewhere in this study, would appear to spring from a similar view of dependency in the aged.

Older people wanting to work in Chinese society have to combat cultural prejudices and enterprise forces that favour the young. They are working more and more out of

economic necessity in a market driven economy that still espouses some socialist principles. China's long-term creation of a new social security system will have a major impact on how many of the aged will want to continue working past retirement. The government also needs to consider how many of its aged want to keep working in order to enrich their lives physically and mentally as well as materially.

Wan (1997) comments that past research on the needs of the aged has looked into their problems that include obtaining adequate medical care but has not examined what senior citizens can contribute to society through avenues such as employment. Even if they are unable to work full time they can do some work. He adds that 70 per cent of the aged in China are under 70 and healthy enough to work but only 35 per cent do so compared to a figure of 60 per cent for this group in Japan.

CONCLUSION

Future work prospects for the aged in China and Japan are difficult to predict. The decline in the comparative size of the current working population age group could result in greater opportunities for the elderly who desire to work or need to work to support themselves financially. However, there are as yet no discernible trends in this direction. The reality, rather, is that a rise in redundancies in both countries from the 1990s on has led to lower job levels for older workers. A view has existed among Japanese policy makers that 'the employment problems of elderly workers will, in the long run, be solved spontaneously by market forces.' (Seike & Shimada, 1994: 44) This seems unduly optimistic, particularly in the light of the continuing downturn of the Japanese economy as a whole.

Where individuals choose to stop working and can enjoy a financially secure lifestyle the cessation of employment can be a very positive thing. This is far more the case in Japan where, generally speaking, most retirees are better off than in China. Most of them possess assets such as housing which ordinary Chinese are only just beginning to acquire as the state has been terminating low rent accommodation to force up home ownership. While an OECD report states that work force ageing 'means that OECD countries will have to rely increasingly on mid and late career workers to meet emerging skill demands' (OECD, 1998a: 123) it concludes that reforms to pensions that reduce the incentive for early retirement would significantly increase the 'labour supply at older ages' (OECD, 1998a: 145).

Retirement is often said to mark the beginning of old age in both East Asia and the West as it marks a winding down in activity. Assumptions have been made about what constitutes the age at which citizens cease to have the capacity to work but these are fast becoming outmoded. The boundaries that mark the onset of old age are blurring as improvements in health lead to the later onset of physical and mental deterioration and as far more people live much longer. The China and Japan of the 21st century, where the ratio of the population over 60 to workers under that age is set to rise rapidly, may have to rethink employment policy to enable more of its senior citizens to work and to afford a higher standard of living.

In this chapter I have examined the position of employment for the aged in China and Japan. While more senior citizens in East Asia continue to work past accepted retirement ages than in the West strong economic pressures are threatening this

capacity. Men remain the focus of studies on older employment. Older women are at a distinct disadvantage in both cultures where their unpaid carer roles are valued over paid employment. Male motives for continuing to work include wanting to remain healthy, maintain work relationships and money, with the first two being more valued in Japan and the third being a prime incentive in China.

The Japanese government has actively promoted job maintenance and creation for older Japanese. The Chinese government's reform program has opened the way for senior citizens to create their own private businesses. Future work force declines as a result of population ageing should theoretically stimulate greater job opportunities for older people but this may not necessarily occur if present trends continue.

In the next chapter I look at pension systems in China and Japan.

CHAPTER FIVE: PENSIONS: PROVIDING FOR A SECURE OLD AGE

INTRODUCTION

In this chapter I examine how China and Japan are currently rethinking pension practices that they introduced in the post World War II decades. The governments of both acknowledge that some change is necessary for pension systems to remain solvent as the ratio of retirees to workers climbs. In the process pension providers must tread a fine line between raising individual contributions to punitive levels and lowering benefits.

Japan has had universal pension coverage since 1961 whereas the People's Republic of China is yet to achieve this goal, having offered pensions only to members of urban work units in its first five decades. In Japan a two-tier pension system is seeing the introduction of easier accessibility to a third tier. China is also going for the three-tier model that has been recommended for it by the World Bank (1997b).

The right to an old age pension became a new feature of life for the majority of urban residents in China and Japan in the second half of the 20th century. In earlier times only the aged poor with no family to support them were seen as deserving any type of aid from the state in the form of poverty relief assistance. Most people worked for as long as they were physically able and were then supported by their kin if they became infirm in their final years. The achievement of longevity was a rare feat in itself that, under Confucian ethics, merited the reward of the goodwill of others for the needs of later life.

The advent of mass pension coverage in East Asia coincided with the new phenomenon of retirement. Pensions were introduced for the first time in China in the early 1950s by the new government for its urban work force. The regime enshrined in its constitution both the obligation to work and the obligation to retire while promising to provide pensions as income support for retirees. Article 44 of the Chinese constitution states, 'The State prescribes by law the system of retirement for workers and staff ... The livelihood of retired personnel is ensured by the state and society' (Chow, 2000:28). Article 27 of the constitution of Japan, introduced in 1947, also stipulates that all people have 'the right and obligation to work,' (Constitution, 2001:8) but makes no specific reference to retirees. However, article 25 gives all citizens 'the right to maintain standards of wholesome and cultured living' (Constitution, 2001:8).

China and Japan both retain mandatory retirement ages although there are no bars to people seeking other employment once they formally leave their permanent jobs. Japan is gradually lifting the mandatory age for both retirement and receipt of pensions from 60 to 65 with a view to reducing state expenditure. Although China is officially staying with set retirement ages introduced in the 1950s, cash-strapped state firms have been internally retiring employees under that age in order to reduce costs.

Policy makers are looking for ways not only to ensure adequate income levels for aged citizens but also to keep down government spending and encourage a higher proportion of contributions from individuals and enterprise as opposed to the state. The Japanese see higher retirement ages as a key measure to attain this. Chinese

authorities are embarked on a major restructuring of social security and medical insurance systems drawing on the expertise of many other countries across the globe, including Japan, Singapore and Australia.

The range of distribution of publicly funded pensions constitutes a major difference between China and Japan. It reflects how the large disparity between their levels of economic development affects their respective ability to afford social security for citizens. Japan offers uniform state pension provisions across the nation. In China government pensions remained the sole prerogative of urban residents from their establishment in the 1950s to recent years. Its major challenge in the next few years lies in creating pension schemes for the rural population for whom these are quite foreign concepts. Wide regional disparities in wealth make uniform provisions problematic.

A major concern for all citizens in both countries is their financial security in the post-retirement years. Fear of ending up poverty stricken in old age is one of a number of factors that have fuelled globally record high savings rates in both China and Japan. Their governments from time to time decry the national propensity to save that keeps down consumer spending when they need it most as their economies start to falter. In the West, on the other hand, governments complain that their citizens do not save enough, a far different problem.

In China workers on average save 40 per cent of their salaries, partly to assuage worries about potential unemployment and heavier social welfare cost burdens (Saywell, 2000). Falling family sizes mean there are now far fewer family members to call upon for assistance if aged family members do find themselves in financial difficulties and this further encourages the tendency to save. Japanese retirees do not use up their savings, unlike their counterparts in other advanced industrial countries (Anderson, 1993).

The first half of the 21st century in both China and Japan will see ever growing numbers of pensioners supported by a slowly declining work force as the population ages and the percentage of retirees rises. Consequent pension costs could cripple national budgets. Younger people fear that government pensions may be withdrawn or severely slashed so their living standards fall below acceptable levels once their wage earning days end. They do not assume they will receive the same level of pension benefits enjoyed by their parents and grandparents who retired earlier during the postwar years of the 20th century or those anticipated for retirees in the early years of the 21st century.

Although the constitutions of both China and Japan state that they guarantee the right to a minimum standard of living for their citizens (Schulz et al, 1991), thus theoretically obliging their governments to assume responsibility for the aged who fall below the poverty line, not all of the indigent aged receive state aid. Families still take up most of the slack. Concepts of what constitutes a minimum standard of living vary greatly between China and Japan due to their different levels of economic development. Citizen expectations are much lower in China which faces a daunting task if the state is to endeavour to guarantee the livelihood of all its aged citizens. A population of 100 million people 60 and over (Wu et al, 1999) means that even very low pensions for all retirees would entail massive amounts of funds.

Japanese pensions, like Japanese salaries, are considerably higher than those in China but they need to be to pay for the world's highest consumer prices. A balanced evaluation of the respective worth of pensions in the two countries should take into account their buying power for both the basic needs of life and added luxuries to enhance enjoyment of life. In addition to pensions a large proportion of the elderly in both countries receive economic support from their families and incomes are shared amongst family members who live together.

Historically both Chinese and Japanese retirees have received pensions calculated on the sum of their final pay in societies where wages have risen on the basis of age rather than merit. This has resulted in disparity between the sexes in pensions. Women have received lower pensions than men because they have retired earlier on lower salaries. Chinese retirees have been given around 90 per cent of their exit salary in pensions which might seem overly generous in global terms. However, in recent years retirees have lost the extra welfare benefits they once received, putting the worth of their pensions far below the remuneration received by workers who do obtain the benefits. The 1985 long-term goal of Japan's public pension system was to provide the equivalent of 68 per cent of the national gross average male wage, excluding bonuses (Schulz et al, 1991). In the interval since it has been recognised that this goal will not be sustainable in the future.

In the 1990s, discussion arose in the Japanese Diet on the feasibility of lowering pensions, but fear of an electoral backlash blocked such a move. The initial introduction of the consumption tax in Japan in 1989 was justified to the public on the basis that the money would go toward social services even though critics say this did not subsequently occur. However, fiscal 1999 budget rules stated the tax was to be used only to finance the basic pension and medical and nursing care of the elderly as a first step toward transforming it into exclusively funding welfare (*Yomiuri Shimbun*, 30 March 1999).

Debate on pension levels looks set to be a major concern of government legislators into the indefinite future as a result of demographic pressures in both China and Japan. Although the ballot box does not pose the same threat to legislators in China that it does in Japan, fear of social unrest restrains creation of overly unpopular policy measures there as the former pension system is dismantled. From the mid to late 1990s demonstrations erupted in places in China where pensions were curtailed by work units suffering economic failure (*South China Morning Post*, 4 August 1999).

No precise data exists on the extent of individual aged poverty caused directly by inadequate post-retirement income in both countries. Figures on the wealth levels of the aged are harder to gauge than in Western nations due to a lack of separate record keeping on the aged. Standard surveys do not keep data on individuals in the group-oriented China and Japan but gather it from households as a whole. Thus the individual circumstances of the many Chinese and Japanese elderly who live with their children remain uncharted to a great extent. Surveys of financial wellbeing focus on families as a whole as economic units rather than on the incomes of individual members (Schulz et al, 1991).

The World Bank has been an instrumental initiator of policy planning studies on pensions in East Asia. It predicts that future old age dependency rates will markedly affect standards of living for all citizens in both China and Japan. A 1994 hypothetical scenario created by the organisation for the futures of individuals born in 1995 in China, Japan, Argentina, Hungary and Kenya said the highest dependency rates for the elderly would occur in China (World Bank, 1994). If pension benefit rates remained constant over the lifetime of a child born in the year 1995, pension contribution rates would have to double in most countries and more than triple in China. In Japan, people who retired in 2055 would derive no net gain from their working life contributions to pension funds while their counterparts in China would have contributed more than they would receive back. Intergenerational tension fuelled by resentment over inequitable benefits could thus be a real possibility, traditions of filial piety notwithstanding (World Bank, 1994).

Ordinary Chinese and Japanese differ greatly in terms of income tax contributions that fund government expenditure on public pensions and other social welfare and health care benefits. While the majority of workers in Japan pay substantial amounts of their income in taxes, which include national, local and health care levies that make big inroads into their pay, the majority of Chinese receive incomes below the level set for income tax payments. Moreover urban Chinese have only recently been expected to make contributions from their wages toward their future pensions, having been accustomed to only being on the receiving end for benefits from the state as a trade-off for their low salaries. Now that their remuneration is being increased to compensate for loss of these benefits such as minimal housing costs, they will be increasingly called on to contribute towards their future government pensions from their own wages.

Although personal contributions to private superannuation schemes are still only in the initial stages in both China and Japan, Western insurance companies have been targeting the two nations as potential sources of major profits. Such firms are spurred on by the size of the burgeoning ageing populations of the two nations as well as the comparative affluence of the Japanese. The 21st century could see the aged cohorts of East Asia become important components of the global economy as they turn into significant contributors to superannuation funds. Japan is already the world's second largest market after the United States for corporate pension funds and is attracting more attention from overseas as Japanese employees are given greater choice in investment funds. Domestic corporate failures in recent years have led to them being more prepared to entrust their pension fund nest eggs to foreign firms (Dawson, 2000). China, with one quarter of the world's aged, is sure to be seen as a potentially huge investor in superannuation schemes.

The pension systems in China and Japan, like those of other nations, have their historical roots in provisions for public servants (Liu, 1999; Shinkawa & Pempel, 1996). Thus government policy has been vital in shaping the directions that schemes have taken. It continues to be crucial to ensure the continuation of basic universal payments and also to encourage or force citizens to pay greater individual contributions from their working salaries toward their own pension payments in old age. In Japan corporate responsibility has also been important since companies have fostered their own pension schemes that make up the second tier of pensions in the country.

Occupational welfare may have been a key element in both China and Japan but has differed greatly when it came to coverage over the lives of recipients. While Chinese work units have offered cradle to grave coverage for their workers and their families, Japanese companies have wound down ancillary benefits such as subsidised housing before the end of a working life. Japanese occupational welfare has covered people only while they were still working on the payroll. In addition, while in China all urban employees of government enterprises have enjoyed relatively similar benefits, in Japan such benefits have varied considerably from firm to firm, depending on financial standing, with many smaller employers and subcontractors not providing them at all (Shinkawa & Pempel, 1996).

Japan, as the world's second largest economy, theoretically should possess high capability to fund reform of its pension system. However, the nation which enjoyed prosperity in the 1980s has been mired in recession since the early 1990s and economic prospects do not look promising for the immediate future. Although Prime Minister Koizumi has vowed to press on with drastic reforms for future good that will cause much pain, asking that ordinary Japanese bear with their imposition, he has been facing much opposition within his own ruling Liberal Democratic Party that threatens to stymie his plans. Thus the prospect of the pension system running out of funds remains a possibility in the next few decades.

China's strong expanding economy may put it in a position to bear the costs of transition to pension reform (World Bank, 1997b). But by 2030, when its aged population has reached the levels of those in advanced industrial nations, the country will be facing the dilemmas of mature economies such as Japan, yet its per capita income will be about one-fifth that of present industrial states. Japan must confront the potential threat to pension provision posed by the major shift toward retirees over workers. While China will not see a decline in the working age population until 2030, (World Bank, 1997b) the phenomenon was calculated to begin in Japan in 2001 (Ohbuchi, 1997).

JAPAN

The first pensions in Japan date back quite early to provisions for certain categories of state employees in 1875 but such payments remained a privilege for a mere tiny sector of the population through into the first half of the 20th century. Mass coverage began only after the Second World War when a number of schemes arose for various industries and professions (Yamasaki & Hosaka, 1995). The government continues to administer both the first tier basic government pension and the second tier employee pension (Miyatake, 2000).

Pension coverage only became universal in 1961. Then a national pension law extended payments of the basic pension to the self-employed, the sole group outside the system, opening the way for all Japanese to become pension recipients. Modifications to the system in 1985 required all citizens over 20 to make contributions to the scheme and established the rights of housewives to receive pensions through their husbands (Miyatake, 2000). The revisions provided more equitable benefits and contributions.

An estimated 96 per cent of households that include elderly people receive the first-tier, flat-rate basic pension provided by the government (Nakamura, 1996). All citizens, including resident foreigners, are entitled to this non-means tested pension provided they have worked and paid in contributions for at least 25 years or are the dependent spouse of a contributor. However, the government is currently querying changing the rules for dependent spouses, an issue that is discussed later in this chapter.

In Japan basic pension payouts are adjusted each fiscal year in line with movements in the consumer price index (CPI) over the previous year (Yamasaki & Hosaka, 1995). The practice was introduced in 1973 to give elderly recipients some protection against inflation. Up until the 1990s it resulted in a steady rise in pensions as the Japanese economy grew. The creators of the policy did not envisage pensions falling as the result of a recession or the recent controversy that this indexing has triggered. In August 2001 a dispute arose between the Ministry of Health, Labour and Welfare and the Finance Ministry when the former ministry refused to cut pensions despite a two-year fall in the CPI, saying senior citizens should not suffer because the economy was suffering. The Finance Ministry labelled this decision fiscally irresponsible and said it would fight the move right up to the settlement of the government budget in December 2001 (*Asahi Shimbun*, 31 August 2001).

The Japanese public pension is intended to cover all citizens to ensure social equity (Yamasaki & Hosaka, 1995). The amount received is far below that of the second tier employee pension and sufficient only for basic needs at the most. Nevertheless, public pension benefits account for over 50 per cent of the total family income of the average household whose head is 65 or over. Thus they have an important effect on the retirement decisions of older persons (Yashiro & Oshio, 1999). The fact that most older Japanese own their own homes means that they can live on this amount if necessary.

Fears have grown that future payouts at present levels may not remain viable as the population ages and birth rates drop. The realisation that younger citizens may have to contribute substantially more of their wages toward public pension schemes than present day middle-aged contributors and yet receive a far lower return has led to resignation that change must occur in the system. This trend has been apparent for some time. In 1984, the Japanese government estimated that the percentage of wages going towards the social insurance premium of the public employees pension scheme was likely to increase from 10.6 per cent in 1985 to 39 per cent in the 2020s if no changes were made to the scheme (Maruo, 1990).

In the 1990s governments prevaricated over rises in contributions for fear of alienating voters. The same worry also slowed down the introduction of the nursing care insurance scheme and led to aged citizens not being asked to make mandatory contributions to it in the initial phases. Social commentators fear timidity on the part of the government may result in actions to deal with problems posed by the ageing society not being taken in time in the 21st century.

A number of second-tier pension systems exist for salaried employees. They include public servants, private school teachers and employees of agricultural, forestry and fishery cooperative associations (Dixon, 1999). Company retirement pay systems,

which originated before World War II, are an important component of financial security for retirees. Initially they were made as one-off lump sum payments based on length of service and final salary but from the 1960s on an increasing number of firms paid them out as pensions. Most firms continued to offer the option of either taking a lump sum or a pension or a combination of the two. The amounts payable vary from firm to firm. For example, a male high school graduate with 35 years service in 1995 was eligible for an average retirement allowance equivalent to 46.6 months wages (Yamasaki & Hosaka, 1995). In view of the extension of life spans this is not a substantial sum.

The design of public pensions has been based on the assumption that women do not work for money outside the home or face the possibility of divorce (Kimura, 1996). Full-time housewife spouses and spouses earning up to 1.3 million yen a year through part-time jobs have been covered by their husband's pensions, with no need to make contributions. They make up quite a large section of the female population but no longer form the majority as they did a few decades ago. In 2001 they accounted for one-third of women in Japan (*Nikkei Weekly*, 5 November 2001). The decline in numbers of full-time housewives and rise of divorce among middle-aged and older have led to assertions in recent years that the national pension system has not stayed abreast with changes in women's lifestyles. Worried by this criticism, the Ministry of Health and Welfare launched a study panel in July 2000 to discuss the issue of women and pensions (*Daily Yomiuri*, 19 July 2000). In October 2001 the group suggested six alternative reform plans. Three of the six options either require the women involved or their husbands to pay premiums for them. At the end of 2001 the matter was still unresolved.

There is no easy solution to the issue. One of the biggest problems is the support of ageing women left alone by losing their husbands through death or divorce. Under the current system housewives who divorce face losing the pensions they would have received through their husbands if they stayed married. While an average couple receives 230,000 yen a month in pension and a widow gets an average 140,000 yen, a divorced woman may only receive 65,000 yen basic pension, which is barely enough to pay for even accommodation in cities like Tokyo (Wijers-Hasegawa, 2001). Moves are needed to ensure that women do not endanger the possibility of a financially secure old age by divorcing. Conversely it is thought that housekeeping burdens may encourage married women to retire earlier than men once they are entitled to pensions as women still perform the bulk of housework (Nagase, 1999). They thus welcome the chance to partially lighten their load by giving up paid work.

Private superannuation schemes form a relatively new market in Japan and may benefit from the Japanese propensity to save for a secure future. They have not proved popular to date because there have been few tax incentives to encourage enrolment in them (Yashiro & Oshio, 1999). Pensions have been based on government and corporate defined benefit schemes. A new law on defined contribution pension schemes that passed through the Japanese Diet in October 2001 allows companies to offer defined contribution US style 401(k) type schemes as an alternative vehicle to existing pensions. Individual participants will be able to choose from various investment options such as trusts while benefits will depend on how well these options perform (Yamagiwa, 2000).

Selling such schemes to the public could be difficult, however, since Japanese prefer to place their money only in secure conditions such as bank deposits, even if returns are very low. According to the Bank of Japan the average Japanese household has over 80 per cent of its money in bank deposits and insurance, leaving only nine per cent for shares and investment trusts (Uozumi, 2001). While firms will be able to reduce their mounting payment burdens under the schemes, employees will have to choose how to manage their assets and be responsible for the results (Uozumi, 2001). It is difficult to predict how many Japanese might opt for such a potentially risky source of income for their later years, given their cautious nature.

Another motivation behind the introduction of 401(k) type pension schemes is the increasing prospect of the disintegration of traditional lifelong employment (Yamasaki & Hosaka, 1995). Some Japanese believe lifelong employment is already a thing of the past. The portability of schemes like 401(k) from workplace to workplace makes them more suitable for a more mobile society. They could also encourage more job switching as to date Japanese have been constrained from changing employment due to fear of losing pension entitlements.

The fact that lump sum retirement payouts from companies have basically never been adequate to bridge the interval between retirement and eligibility age for the government pension has motivated Japanese workers to continue working after formal retirement (Schulz et al, 1991). Moves to raise the age of eligibility for government pensions to 65 have met with howls of protest from unions and senior citizen organisations on the grounds that even the present time gap between private and public payouts of pensions aggravates financial security and necessitates a long working life. Motives among the aged to continue working are not purely financial however. A 1989 survey of men and women over 59 found that only 39 per cent work because they needed the money (Schulz et al, 1991).

Anxiety about financial security in old age has fuelled a preoccupation with the future of the pension system in the mass media. In recent years many popular magazines have featured special editions on the topic while advice books on planning for a financially secure retirement have been bestsellers. The economic recession of the 1990s made the public more anxious about their old age than they had been in the more rosy and prosperous 1980s when it was thought that Japan might slip into number one place in the world in economic might over the United States.

Conflict could flare up over intergenerational inequity caused by unequal pension payments. Hatta and Oguchi (1999) cite two problems that could add to this possibility. The first is the fact that present day younger Japanese seem likely to end up paying out more money in contributions than they receive in their old age while their predecessors end up gaining more. Hatta and Oguchi (1999) calculate that, while Japanese born in 1935 will receive 262 per cent of their lifetime income in pensions, Japanese born in 2005 can expect only 13.9 per cent of their lifetime income in pensions.

The second problem is the fact that one-third of people supposed to contribute to the national pension system are not doing so, leading to a hollowing out of funds. The self-employed and students in this category are currently able to get away with this evasion because there is no stern policing of the system (Hatta & Oguchi, 1999).

While the government can draw on the assistance of employers to collect contributions from employees, it must rely on the self-employed and unemployed to chip in for themselves. Most of the evaders are people in big cities who consider contributions to be too high in the light of what they perceive as the unreliability of social security (Gillion et al, 2000). Paradoxically, in not paying their dues because they worry about not receiving an equitable pension, they are further endangering the future stability of the pension system.

Other social welfare benefits in Japan do not facilitate an exit from the work force as readily as their equivalents do in some other OECD states. Unemployment benefits, for example, cannot be extended beyond 12 months. Disability pensions cannot be used to finance early retirement as is the case in some Western countries since eligibility for them hangs on having sustained injuries and physical disabilities that occur with ageing do not fit under this category (Gillion, 2000).

The 1994 pension reform that occurred amid financial crisis had three main parts: a rise in pension age to 65, a rise in contribution rates and reduction in the level of public pension benefits (Kimura, 1997). It aimed to discourage people in their early sixties from leaving the labour market. It was estimated that contribution rates for pensions could rise from 14.5 per cent in 1994 to 34 per cent in 2025 if the pension age remained at 60.

The selection of Junichiro Koizumi as Prime Minister in April 2001 led to concerted efforts to introduce reforms to fight the effects of recession, but doubts still existed about the extent to which these could be achieved in the pension system while retaining public confidence.

CHINA

Over its first decade the People's Republic of China installed a retirement pension scheme for its urban workers that was similar in scope to those provided by OECD countries (Gillion, 2000). This made China unique among developing countries at the time. Others lacked such provisions that were still the preserve of developed nations. During this period there were relatively few retirees compared to workers in China so the government could easily afford to shoulder the total responsibility for funding pensions for the elderly. This is no longer the case since the rapid ageing of the population in recent years has led to a rapid increase in retirees. A consequent blow-out in pension expenditure has resulted in a shift in responsibility for funding. Individuals are to be made to contribute from their own salaries toward their future pension payouts.

Urban residents in China have thus seen startling changes to their previously securely entrenched pension system since the beginning of reform and opening up to the outside world over two decades ago. They have moved from the pre-reform situation, where they did not have to make any contributions toward their future pensions, to one where the government intends to gain the maximum possible contributions from individuals in order to ensure the continued funding of pensions. However, officials have been proceeding cautiously with social welfare reforms for fear of stirring up social unrest. This is seen as a real danger since too rapid loss of benefits previously taken for granted could stir up resentment (Croll, 1999).

As in Japan, one of the main impetuses behind the official push for pension revision is the prospect of a rapidly ageing population exhausting government funds. China does differ from Japan in that the development of its pension system did not make steady progress over the past half century but fluctuated and declined in the wake of political campaigns and upheavals before rebounding. The most significant disruption occurred during the Cultural Revolution when many of the country's institutions were denounced as reactionary. One of the victims was the body responsible for pensions, the All China Federation of Labour, which was abolished in 1966. The onus for payouts and other benefits was handed over to enterprises from the central government in 1969. During the decade-long turmoil many applications for retirement were refused on the grounds that retirement was anti-socialist (Davis, 1990). A consequent backlog of applicants was only able to retire in the early 1980s after the commencement of reforms. There was consequently a great rise in the numbers of retirees (Lee, 1993).

Pension reform has been developing at different rates in a range of cities across the nation. Cities along the affluent eastern coastline have been far quicker to move into creation of new provisions than their counterparts in the much poorer hinterland. Shanghai, with the largest and most long-lived aged population, has been at the forefront of reform. In 1997 its over 65-year-old population stood at 16.26 per cent, a figure comparable to Japan and far ahead of any other city in China (Gu, 1997). Shanghai pioneered an attempt at a social insurance system for collective owned enterprises in 1981, prior to the national call for reform of the social security system in 1985. Looked at in retrospect it was not overly practical. The contribution rate and benefit levels would not have met minimum medical care and retirement needs for contributors when they eventually retired (Chow, 2000).

Shanghai persisted with reforms. In June 1993 the metropolis was the first place in the country to introduce a system to ensure a minimum standard of living for urban residents and by 1997 about one-third of all Chinese cities had inaugurated similar schemes (Tang, 1999). By 1996 the metropolis had introduced old age insurance schemes for 90 per cent of local workers (Gu, 1997). To help ensure financial security for the aged and take advantage of a healthy aged work force with a high level of education a pension age of 65 was promoted (Gu, 1997). An estimated 46.1 per cent of the city's aged live only as couples or alone (Chui, 1998). This theoretically makes them more dependent on their own resources than the many other urban elderly Chinese living with their children with whom they share incomes.

China has been looking at overseas pension schemes for measures adaptable to local conditions. Social scientists see Japan as offering fitting models, partly due to shared cultural similarities in family care for aged relatives inspired by Confucian ideals. Sun and Wang (1997) advocate strengthening of legislation and creation of new statutes in line with Japanese laws to fortify aged care. Xiong (1999) believes the three tier system in Japan that covers government, corporate and private individual pension schemes is suitable for China.

Chinese leaders have openly espoused models provided by the Central Provident Fund of Singapore. When first established in 1955 the Singapore fund was just a compulsory savings scheme for old age but it now also helps citizens pay for housing,

hospitalisation and education. Its obvious attraction is the fact that it encourages people to save to for their own needs rather than rely on the state. There are, however, some contradictions between the Singapore scheme, where employees must bear a substantial proportion of contributions, and the existing socialist program in China, which is mostly financed by enterprises (Chow, 2000). Moreover, the Chinese version is completely based on social planning, with government having the final responsibility (Yang, 2000).

While the Chinese government may be drawing on foreign expertise to reform the security system, it simultaneously remains determined to implement a system that emphasises Chinese characteristics, culture and family bonds. This entails guaranteeing a basic livelihood for the aged (Liu, Yang & Zhang, 1999). Social scientists proposing measures to deal with the problem of an ageing population stress that three special Chinese features are involved. The first is an emphasis on the role of the family in caring for the aged. The second is a breakdown into three forms of insurance: social security, family and individual. The third is the bolstering of social security for stability (Liu et al, 1999). In other words, there is a desire to hang on to traditions engendered by filial piety while introducing other ways of funding a secure old age.

Postponement of the retirement age is proposed as one means to this end. As in Japan, this necessitates offering greater job options for older workers. In the early years of the People's Republic levels of retirement were very low and thus posed no drain on government funds. It was at this stage that the present retirement ages of 60 for men, 55 for white-collar women and 50 for blue-collar women were brought in. In the interval since average longevity has risen from 40.8 years to over 71.2 years (Zhang, 1999a).

In the period following the introduction of reform from 1978 up to 1995 the number of retirees increased nine fold and the costs of retirement to the authorities went up 70 fold. In 1991 it was projected that by 2000 there would be four workers for each retiree while there would be 1.8 workers per retiree by 2030 (Zhang, 1999a). While in 1978 there were only three million retirees, by the end of 1995 the number had blown out to 31 million (Wong, 1998).

The importance of pensions for elderly Chinese, who lack the assets of their Japanese counterparts such as housing, is crucial. Pensions constitute the main form of income for urban Chinese, with one survey giving a figure of about 56 per cent of retirees living principally on their pensions, while children contributed 22.4 per cent of their income. This is in sharp contrast to the rural areas where children are responsible for 67.5 per cent of their parents' income and the aged are yet to receive pensions (Chui, 1998). If the Chinese government's plans to expand pensions nationwide succeed the next generation of rural aged will be covered.

Pensions for many urban retirees in China appear quite generous in comparison with those of many other countries as they come to over 80 per cent of exit level wages. In 1997 the World Bank recommended that Chinese pensions be brought down to about 60 per cent of net wages and be indexed to prices rather than wages in order to protect workers (World Bank, 1997b). Compared to the overall income and benefits received by Chinese workers, however, these pensions are relatively low since wages have

been only part of incomes supplemented by a variety of benefits. In Guangzhou City wages as a proportion of worker's total income declined from 86 per cent in 1979 to 51.5 per cent in 1992. The Guangdong Social Insurance Bureau estimated in the mid-1990s that, if pensions were paid at the usual rate of 75 per cent, the retiree would only receive 38.6 per cent of his or her former wage (City University of Hong Kong, 1999).

The linking of pensions to wage rises should go some way to alleviating the erosion of the value of pensions that occurred during the 1980s and 1990s as a result of inflation. In 1997, for example, rising prices caused an effective drop in income for 40 per cent of residents in medium and large cities (Tang, 1999). Pensions are now scheduled to rise on 1 July each year at a rate in proportion to wage increases in each province over the preceding year (Gao & Chi, 1996). The linking of pensions to final salaries has also disadvantaged women in comparison to men. The earlier statutory retirement ages for women mean they have retired on lower salaries and thus lower pensions. However, no change has been proposed in this regard.

The triple-tier pension system, recommended by the World Bank in the 1990s for China (World Bank, 1997b), is the preferred state model for future pension policy. It is to follow the lines of similar systems in developed countries where tiers consist of government, private enterprise and individual worker contributions. The individual component is yet another example of the shift from total dependency on work units for material benefits, that was the norm pre-reform, to laying the onus on citizens to fund services out of their own wages.

In 1986 the State Council announced that, as part of labour reforms, new workers would be asked to begin giving ongoing individual contributions from the commencement of their employment toward their future pensions. It represented the first step toward establishing a social security system with Chinese characteristics (Chow, 2000). The move aimed to increase worker feelings of personal responsibility, diversify sources of funds and ensure aged care measures. Workers under the labour contract system established at the same time were to pay no more than three per cent of their monthly wages into the old age insurance fund. Nothing was done about workers already in employment. In 1995 the country adopted a mixture of defined benefit and defined contribution systems under which participants would receive a defined benefit from pay-as-you-go taxes and also be involved in a defined contribution program (Feldstein, 1999).

A 1997 national decree said worker contributions would be gradually increased to a maximum of eight per cent from the then five per cent. (Office of social security management, (1999) This followed decades of reliance on pensions funded solely by the state (Gao & Chi, 1996). The national network was to apply to both enterprise workers and the self-employed under a mixed funding method for basic pensions with local governments to take over financing operations (Chinese Academy of Social Sciences, 2000). Partial accumulation was chosen as a funding model because of its ability to relieve the pressure an ageing population imposes on capital and enterprises. It was also considered more acceptable to ordinary Chinese with their tradition of saving (Chinese Academy of Social Sciences, 2000).

The many experiments in pension design since 1997 have culminated in a government goal of establishing a unified nationwide pension system. Enactment of this has been complicated by the creation of a variety of schemes all over the country as local areas have wanted to retain control over pension funds rather than hand them over to a central body (World Bank, 1997b). The economically more advanced regions along the eastern seaboard have progressed much faster in the realm of pension provision than the relatively impoverished hinterland.

Chow (2000) summarises the old age insurance system China wants to implement in the cities as having two clear main parts. One would guarantee a basic living standard and the other would stress ability to save for one's future. The system of individual accounts is to recognise the varying earning capability and needs of people as well as try to change the thinking that social security benefits are 'gifts' from the state (Chow, 2000:114).

The Ministry of Labour favours a more generous, and thus more adequate, old age pension which is not supported by enterprises with fewer retirees under the new system of pooling funds. The Ministry of Finance favours encouraging workers to save as much as they possibly can to have a better life in retirement. Under this option the basic pension is just above social assistance relief (Chow, 2000).

The biggest problem for the present new social security systems in China lies in the interval ahead when workers who have not contributed to defined contribution schemes will be retiring. The state will not have accumulated sufficient funds to both pay the pensions of these individuals and amass contributions by younger Chinese toward their future retirement.

CONCLUSION

The task of devising national measures to adequately cater for retirement pensions requires long-term vision that can accurately predict and then prepare for future social and economic trends. Unfortunately, policy makers do not possess a magic crystal ball. The officials in developed countries who formulated social security programs such as pensions in the 1930s, 1940s and 1950s failed to anticipate subsequent major trends that have seriously eroded the effectiveness of their measures. These trends included the expansion of female employment, the growth of unemployment among older workers from the 1970s on and subsequent demand for early retirement provisions, the baby boom and later birth rate decline, and the rise in longevity (Gillion et al, 2000). Many of the alarmist predictions that fiscal disaster will be triggered by burgeoning pensions in countries with ageing populations seem to assume present trends will continue to dominate into the future. As such, they could turn out to be as ill-judged as the vision of the pioneers of pensions.

The very inability to predict the future means that many citizens will continue to feel insecure about whether they will be able to enjoy a properly funded old age. Individuals feel vulnerable because they cannot be sure how long they will live and therefore they do not know how much money they will require in their later years. A young Japanese who initiated a savings program for his retirement in 1953 could have found by 1990 that he had accumulated only 70 to 75 per cent of what he needed to finance his retirement since life expectancy had increased so dramatically (Gillion et

al, 2000). At least he would have had the consolation that he had not contributed more to the fund than he would receive in return. A worker born in 1970 could find that his contributions could exceed benefits by about 10 per cent of lifetime wages (Hatta, 1996).

Contemporary policymakers are now calculating new measures on the basis of presently known new social phenomena such as the one-child policy in China and the increase in the numbers of the extreme aged. They cannot be certain how long these trends will persist. Their endeavours to get individuals to contribute more to their pensions over their working lives to ease the burden on the state require reciprocal trust from the contributors that this will result in security in old age. At the moment they are failing to convince the populace that this will be the case.

Ratios of workers to retirees are narrowing in both nations, thus pushing up the proportion of the population receiving pensions. In urban China the figure has dropped from 7.3 workers to one retiree in 1986 to 3.9 workers to one retiree in 1998 (Lu, 2000). These levels are predicted to fall even lower over the next few decades. Pension payouts could be substantially reduced if more people were able to work for longer.

The basic three ways that Miyatake (2000) says apply to Japan if it is to survive the pension financing crisis could also be said to hold for China as well. The first is an increase in insurance contributions, the second is a rise in the starting year for receiving pensions, and the third is a cut in pension benefits (Miyatake, 2000). All three entail sacrifices by citizens and not greater input by government or corporate bodies.

In this chapter I have examined the situation of aged pensions in China and Japan. Both countries acknowledge that the sustaining of pension funding that provides a comfortable level of life constitutes a major task over the next few decades as retiree numbers sharply escalate. They are adopting similar solutions in the form of triple-tier systems that include government, enterprise and individual contributions.

In the next chapter I look at medical care provision in China and Japan, concentrating on health insurance and its affordability for the aged who generally use up more national resources in this area than the young.

CHAPTER SIX: MEDICAL CARE: THE COST OF A HEALTHY OLD AGE

INTRODUCTION

In this chapter I examine how the governments of China and Japan, having successfully improved the overall health of their people in the last 50 years, are revising their health policy to prepare for the next 50 years. They anticipate a sharp rise in medical costs as a result of population ageing. To deal with this they are altering the balance of sources of health funding.

Japan is far ahead of China in the area of health care for the aged. While Japan has given citizens aged 70 and over special health care provisions since 1973, China is yet to bring in dedicated health measures for the elderly. However, to help rein in costs, in 2001 the Japanese government proposed lifting the age for the entitlement to special health care provisions from 70 to 75. Both countries envisage increasing mandatory contributions from citizens for their health care insurance. Japan has imposed an extra levy on all citizens over 40 for the long-term care insurance scheme.

Availability of affordable medical care constitutes a key issue as populations age, increasing the proportion of the very old whose medical bills require far greater expenditure than those of younger citizens. Health affects the extent to which individuals can remain active in society, including as family members, paid workers and volunteers. Asked what is their main priority in life, the majority of elderly Japanese nominate health (Palmore & Maeda, 1985). Many Chinese and Japanese believe that work keeps them healthy so they prefer to work rather than retire. In a similar vein, Japanese women expressly cultivate hobbies in order to have fulfilling activities for their later years because they believe this will preserve their physical and mental health (Lock, 1993).

In the immediate decades following World War II China and Japan instituted highly successful primary health care programs that eradicated endemic disease and raised the overall health of their citizens, radically lowering death rates (Tang & Parish, 2000). This resulted in a sharp growth in longevity rates and a consequent rapid increase in numbers of aged. The achievement is now causing headaches for their governments who are looking to update their health insurance programs in order to keep medical care affordable for future much larger populations of aged. The crunch has already begun due to demographic changes caused by low birth and mortality rates.

Although the majority of the aged retain their health many still worry that a future decline in their condition could impact badly on their finances and families. While people aged between 65 to 75 years are mostly not in greater need of medical care than the general population, those over 75 consume a far greater share of medical time and costs than younger members of the community. The rise in numbers of this latter so-called 'old old' group compared to other sections of the population over the next few decades is predicted to lead inevitably to higher national medical bills. One 1998 Chinese survey of Chinese women over 80 found that few were healthy, with over half counting themselves as infirm (Liu, 2000d).

Fiscal pressures threaten the scope of future provision of health care overall. The ability of the two nations to deal with these pressures varies greatly due to their different historical, economic and social backgrounds. Historically, Japan has led China in the area of medical care generally and of special benefits for the aged, starting with nationwide universal health insurance coverage from 1961. The special health needs of the aged were recognised by the Japanese introduction of nationwide free care for all citizens 70 and older in 1973, following the pioneering of the practice by local authorities. The subsequent blow-out in costs for this age group resulted in a scaling back of the practice in 1982 and the re-introduction of a limited percentage of fees. The Koizumi government proposal to raise the age of eligibility for aged medical care is a clear example of how the definition of what constitutes old age is being moved higher for economic reasons.

Historically, China has neither created special health care schemes for the aged nor given the aged priority in the allocation of medical resources. As a developing country it has had to concentrate on care for the population as a whole rather than on separate segments of it. Prior to the era of reform the urban elderly received the same free health care as others attached to their work units. The ready availability of free consultations resulted in people making frequent visits to clinics for non-critical symptoms such as fatigue and loss of appetite (Zhang & Yu, 1998). In the wake of reform, state-owned enterprises reduced benefits and brought in bills. Since then many urban residents have lacked adequate health coverage and have been faced with unaffordable co-payments (Tang, 2001). There is a continuing shift to greater individual responsibility for health care costs. In December 1998, the State Council announced a contributory medical insurance program for urban workers. By the end of 2000 the scheme had been extended to 284 cities and 43 million people but funds for it are under pressure as the ratio of retirees to employees rises (Feng, 2001).

In terms of economics, Japan has successfully maintained a system of universal health insurance coverage incorporating mandatory contributions based on income from citizens over 20 since 1961 (Ogura, 1994). Policy planners nevertheless continue to worry about whether the system can remain economically sustainable in the future as the population ages dramatically since medical costs for aged citizens far exceed those of younger Japanese. They fear potential intergenerational conflict if the young come to resent high taxes to fund services for their elders that may no longer be affordable by the state when they in turn reach old age. Conversely, the expansion of the health care industry brought about by ageing could help the young by providing more jobs and boosting spending. Japanese corporations are looking at 'silver' business as a new market that can only expand as the population ages.

China's handling of health care is now driven by economics. The sheer size of aged numbers in China could entail massive payouts by the government for even very basic services if it were to continue the previous practice of free health care in cities. Policy is moving toward the ever greater imposition of medical insurance levies on citizens that will eventually cover the entire nation. The new urban medical insurance system, which calls for contributions of six per cent from employers and two per cent from employees, will cover only a fraction of a much larger populace (Tang, 2001).

In social terms, while some Japanese acknowledge it is a blessing that Japan boasts the world's longest-lived people, stating it to be a proof of affluence, they also see the

phenomenon as a mixed blessing (Ohbuchi, 1997). Miyatake notes that, while having 'the longest average span in the world is an honor' (2000: 58), the reality is that there are more elderly people unable to manage on their own in their later years. The head of China's national federation on ageing notes that, while the ageing of the population is the greatest problem of the 21st century, it is also the main symbol of human progress for the new era (Zhang, 2000c).

The lifestyles of the present generations of elderly in China and Japan stem from traditional patterns of diet and physical activity considered conducive to good health. The health of the aged in both countries is aided by eating habits that feature little fat and meat, mainly vegetables, and small portions. Few Chinese or Japanese aged are overweight compared to their Western counterparts (Campbell & Ikegami, 1998). Nevertheless people in both countries may be moving toward more Western patterns of diet that could lead to increased heart disease and cancer (Hatano, 1994). Older Okinawans, who boast the greatest longevity of all Japanese, decry the fact that fast food chains are drawing younger people in their prefecture away from the traditional diets that are believed to bolster longevity (Karasaki, 2000).

Many urban aged Chinese and Japanese get more regular physical exercise than their Western counterparts. Walking and cycling to shops and public transport, rather than car travel, are part of their everyday lives. Early morning exercise is popular among the elderly in cities in both countries. City parks in China are common gathering points in the early daylight hours for groups of the middle-aged and elderly who practise traditional exercise forms such tai chi or qi gong or engage in more flamboyant dancing. In Japan the aged participate in early morning exercises in the street to broadcasts of a national radio program that has been popular for many decades.

Present official policy in both countries for the frail elderly who require medical services favours having them stay in the home over going into institutions. Governments have been quick to point to traditional values of filial piety and mutual family assistance as vital adjuncts for this. They also want to promote community services to help families and assist the growing numbers of single and couple only households where illness and disability can lead to institutionalisation without the provision of home help. In the following sections I provide a more in-depth discussion on each of the two countries.

JAPAN

Since the 1950s the trend in Japanese health care policy has been toward 'creating a universal, compulsory and comprehensive medical care system' (Lee, 1987: 253). This has served to ensure that all Japanese, including the aged, have received affordable care. Mass health screening is widespread and Japanese people are likely to take action to remedy a problem at the first sign of an ailment (Campbell & Ikegami, 1998).

Health has consistently rated as a top priority in life for the Japanese. Overall levels of health are high among the aged population in Japan and most do not require medical attention. Ministry of Health and Welfare figures show that in 1996, for every 100,000 people above 65 years of age, 4.1 per cent, or 4,0458, were hospitalised and

14.5 per cent were receiving treatment from clinics (Management and planning agency, 2000). However, medical costs for the elderly far exceed those for the young. Costs for people aged 70 or older rose 8.8 per cent in the fiscal year 1999, accounting for 39.1 per cent of total medical expenditure. Half of all medical costs are for people 65 and over (*Nikkei Weekly*, 29 October 2001). According to the 1997 ministry annual report on medical care for the aged the average costs for individuals over 70 are 3.4 times those for the general population (Management and planning agency, 2000). Costs for people over 80 are eight times the national average, while patients over 70 take up 25 per cent hospital beds for the acutely ill (Ferries, 1996). The continuing rise in national medical expenditure as the population ages has led to fears that expenditure may balloon out to unsustainable levels over the next few decades. In addition, the stagnant economy has resulted in little growth in revenue from health care premiums (*Daily Yomiuri*, 3 December 1999).

Health care is freely available in Japan as is the choice of health care provider. The introduction of universal medical care insurance in 1961 coincided with the arrival of universal public pension schemes. Every adult Japanese is obliged to participate in one of a variety of public medical care insurance schemes, with premiums based on level of income and ability to pay (Optical surgery news, 1997). All schemes continue to be financed by mandatory payments by the public, government finances and co-payments from patients.

The 1963 Welfare Law for the Aged offered comprehensive health and welfare services to low income citizens aged 70 and over or bedridden people 65 and over (Ohmura, 1978). It also emphasised the social importance of health, and the responsibility of individuals to keep healthy, noting that older people 'shall be conscious of their mental and physical changes due to aging, and shall always endeavor to maintain their mental and physical health to participate in society' (Hashimoto, 1996: 35).

Free health coverage for all aged was first introduced in urban Japan in 1969 by the mayor of Tokyo and leaders in other cities followed in his wake. The original initiative came from the actions of a mayor of a small mountain village in 1960 (Campbell, 1992). Similar measures were incorporated in national legislation in 1973 as a response to these 'local rashes of socialism' brought in by socialist politicians' (Kiefer, 1987). Consequently the rate of medical consultations for the aged exploded (Hatano, 1994). The greatly increased use of health resources by the elderly led to widespread public alarm, with the blame put on the aged for taking up an overly large share of health care expenditure (Kiefer, 1987).

A worried government revised the 1973 law in 1983 to re-introduce some costs for services for the aged. A pooled insurance fund was created to counter the burden of bills generated by the majority of elderly Japanese who contributed few or no premiums to the medical insurance funds but drew heavily on services (Hatano, 1994). At the same time preventative health was strengthened through making annual low-cost checkups available to all Japanese over 40 and home care was promoted for the infirm (Kiefer, 1987).

In the late 1980s the government looked to promote domiciliary care to decrease the excessive levels and length of hospitalisation among the elderly in Japan that came to

light. A 1987 survey found that more than 40 per cent of patients stayed in hospital for six months or longer and that 70 per cent of them were elderly (Hatano, 1994). Hospitals were being used as an alternative to care in the home or in other institutions because they were relatively cheap. Long-term stays were affordable for average Japanese because the cost of hospitalisation on medical grounds was completely covered by insurance (Hatano, 1994).

In addition, hospitals where more than 60 per cent of the beds were taken up by patients over 70 could be designated geriatric institutions with lower requirements than ordinary hospitals. These employed fewer doctors and nurses than standard clinics but had more carer staff since they were entitled to higher reimbursements for workers in that category (Hatano, 1994). Moreover, families were happy to place their relatives in these hospitals since they thus avoided the social stigma associated with nursing homes. Resorting to the latter was seen as tantamount to abandonment of parents, and thus of filial obligations, but placing parents in a hospital was regarded as a display of kindly concern rather than an inability or reluctance to care for them.

Despite efforts over the last two decades to reduce this 'social hospitalisation', as the Ministry of Health, Labour and Welfare have recently called it, the practice still accounts for a sizeable number of aged hospital inpatients. A ministry survey in October 1999 found that 182,000 out of 828,000 over 65-year-olds in hospitals remained there despite the fact that their treatment had ended and they were not in need of any further medical attention. The ministry ascribed this phenomenon to a continuing shortage of welfare facilities for the aged (*Nikkei Weekly*, 14 May 2001).

The decade-long Gold Plan that marked the commencement of attempts to merge health and social welfare services began in 1989 with the goal of encouraging more of the aged and disabled to remain in their homes rather than move into institutions. In order to facilitate the shift to paid care at home it aimed to greatly increase the provision of domiciliary services and staff to levels more comparable with those in Western nations. The ministry announced that the increase in 'the population of the latter-stage elderly' and lower capacity of families to provide long-term care made this an urgent national issue to be implemented as soon as feasibly possible (Ministry of Health and Welfare, 1998).

When the scheme seemed to proceed more sluggishly than had been planned, the New Gold Plan with more ambitious goals was implemented in 1994 to push it forward. The revamped plan aimed to 'promote support for home-care nursing services and to integrate the management of home medical care into the overall welfare system' (Home Nursing Foundation of Japan, 1998). However, when the scheme ended in 1999, it had proved no more successful than the first plan. While the overall Gold Plan signified a major expansion of the Japanese welfare state by acknowledging that ordinary citizens were legitimate recipients of special government benefits, it was only a part remedy. The project was too small and a new system needed to be put in place (Campbell, 2000). Ultimately, the schemes were seen as failures since they could not attain their ambitious targets for service personnel for the aged.

The Gold Plan 21, to extend from 2000 to 2004, is carrying on the work of the earlier plans. It is to fight the negative image that equates being old with being weak and to promote respect for the aged in the 21st century that it dubs the 'century of the aged'

(Ministry of Health and Welfare, undated). Like the earlier plans, it has set ambitious quotas for future numbers of staff for the aged, such as home helpers, as well as for numbers of day care and other special centres. Its long-term aim is to enact revision of aged welfare and nursing care.

The long-term nursing care insurance scheme commenced operation in April 2000 to ensure access to affordable care for the escalating numbers of aged in the population and to ease the burden on family carers. The scheme aims to remove the former stigma associated with seeking government assistance that made families reluctant to ask for outside help. Based partly on the globe's first such plan set up by the German government in 1994, and constituting the second such scheme in the world, it represents a qualitative change in social policy according to Campbell (2000). It covers both home and institutional care and integrates welfare and health services.

A compulsory levy placed on all Japanese over 40 provides 50 per cent of the funding for the scheme. The other 50 per cent is split into 25 per cent from the national government, 12.5 per cent from the prefectural government and 12.5 per cent from local government authorities who administer the system. Recipients of services, who normally must be 65 or over, have to pay out only 10 per cent of the cost, with the remaining 90 per cent contributed by the government (Miyatake, 2000).

While it remains hard to predict how many payers of the levy will consequently call on such services, statistics indicate that a substantial number of people, including the aged and their families, could benefit from them. Although prior to the scheme's commencement it was estimated that 90 per cent of contributors would receive no benefits (*Asahi Evening News*, 19 January 2001) this does not mean that considerable demand might not exist in the community. A 1998 survey on national lifestyles showed that for the first time there were over one million Japanese requiring care at home. Out of these, 145,000 individuals were completely bedridden and 171,000 were mostly bedridden (Management and Planning Agency, 2000). Just before the end of the first year of the scheme the number of applicants had reached 2.7 million with over 80 per cent of users reporting they were satisfied with the services (Hirao, 2001).

The media have highlighted gripes that the system is not operating very well. One research institute notes, however, that 'these complaints could also be interpreted instead as growing pains, since many of the complaints predate the system, and have actually only surfaced due to the heightened awareness of users' rights under the system' (Hirao, 2001, p.19). A trenchant critic says the scheme is not working because it was brought in too hastily while the German system started up only after many years of far more careful planning (Homma, 2000).

Such a scheme could prove crucial to guide Japan through the next few decades due to its capacity to counter aspects of traditional culture that restrict the elderly from achieving their full potential and often relegate them to an infantile position. The high incidence of bedridden in the Japanese aged population has been attributed to the tendency to 'amae' (usually translated as to 'indulge') in relationships first described to the West by Doi (1978). Nasu criticises this form of treatment of the aged in Japan by saying it often resembles that for infants and denies the aged significant roles in society (Bentelspacher & Minai, 1994). A book produced by the Ministry of Health and Welfare that pinpoints 'amae' as a factor behind the frequent confinement of the

aged to bed concurs with this judgment, calling the practice of 'amae' a case of mistaken filial piety (Aged welfare division and aged insurance division, 1988). In attempting to be kind families restrict the mobility of their aged to protect them from possible injury from overexerting themselves. However, they do not allow their elders to test the limits of their abilities themselves.

Japanese gerontologists who visit Western countries to research Western care for the aged to gain ideas for Japan are struck by how staff there help the frail elderly to get out of bed to sit in chairs or wheelchairs during the day before returning them to their beds at night. Such observers are concerned that no comparable effort is made in Japan where residents are left in bed 24 hours a day. The Ministry of Health and Welfare first pinpointed this problem under the Gold Plan with a 10-point scheme to achieve a national goal of 'zero bedridden'. Measures to overcome the problem start off by having patients spend some time out of their beds during the daytime (Tsuyama, 1996).

There is a tendency for people to have more need for institutional and domiciliary care services as they age. In 1998, for every 1,000 Japanese aged 61 to 65, 14.1 and 5.5 per cent used special nursing homes and aged facilities respectively. For people aged 70 to 74, the figures rose to 25.8 and 17.1 per cent. They increased to 41.1 and 30.8 per cent at 75 to 79, 59.7 and 45.9 per cent at 80 to 84, and 119.6 and 65.5 per cent at 85 and over. In the same year 981,000 households, or 2.2 per cent of total households nationwide, had aged members requiring care. Only 9.8 per cent of households had a single member, while 18.4 per cent consisted of couples and 39.6 per cent were tri-generational (Management and planning agency, 2000).

Care managers employed by the local authorities set the level of services and number of hours of weekly care an individual can receive. The decision on the level itself is determined by computer analysis of a series of 48 set questions put to each applicant. Gradings range from the lowest category of 'need assistance' for recipients living at home who are still relatively mobile through to a series of gradings from one to five for individuals who can opt for either domiciliary care or institutional care (Homma, 2000). Critics of the new scheme say that these gradings often do not accurately affect actual needs and that this failure is causing undue hardship to families who had assumed their worries would end with the introduction of the new system (Kadono, 2001). They question the professionalism of many of the newly created care managers who have been put through rush training to get enough of them into the field.

The new scheme has yet to prove to be as financially successful as it was initially forecast it would be for private companies entering the new field. The relatively low take-up rate of services is cited as one reason for this. Another is the unduly high expectations of potential profits in the aged care market. Several enterprises which started off with grandiose plans have since floundered and this has served as a disincentive to further newcomers. The most prominent of these firms, Comsn, received extensive publicity during the early stages of the scheme. The company hired large numbers of staff, many of whom it has since had to lay off, and took out expensive advertising in the Japanese print and TV media in the belief that a flood of business would ensue (Kajiki, 2000). It did not eventuate in the short term, however.

It appears to be still too early to judge how long it might take for the public to become more receptive to the scheme. Prejudices may still linger against handing over care of family members to others, and fear of neighbourhood censure remains, but both are thought to be waning in urban Japan. Regulations introduced by the new scheme to improve conditions have paradoxically threatened the financial viability of some existing services, including group homes for dementia sufferers modelled on Scandinavian practices.

A group home I visited in Saitama Prefecture near Tokyo in April 2001 had been forced to relocate and build new premises due to the requirement of the new law that all residents in such homes must have separate rooms. The move involved a long search before an affordable site with amenable local residents who would not oppose its establishment could be found. Many of these homes are founded by people disillusioned with larger institutions. However, the fact that they can only pay staff very low wages by Japanese standards means they have difficulty procuring enough employees to maintain the high ratio of staff to residents they deem essential. The new system would not appear to be working in their favour.

However, the expansion of new treatment facilities is leading to more cases of dementia being diagnosed according to ministry officials. A medical analyst says the treatment of dementia will rank with pensions among the most difficult problems the ministry will face in the 21st century (*Asahi Shimbun*, 21 October 1998).

CHINA

China lies a long way behind Japan in the area of health care for the aged who it is yet to treat as a special category or priority. Thus this section on China focuses principally on health care for the population as a whole and its consequent implications for older Chinese. While Japan began targeting special measures for aged medical care as early as the 1960s, when it also established nationwide health care insurance, China is still to create an all-encompassing health system. Paradoxically, the massive increase in numbers of aged Chinese and extended longevity nationwide are a result of highly successful mass health policies that have been in operation for the last five decades or so.

Early health policies in the People's Republic of China focused on prevention of illness. The eradication of endemic disease and proliferation of public health education campaigns dramatically raised life expectancy and general levels of health and lowered infant mortality. By any standards, China's achievements in improved health of the population have been remarkable (Pearson, 1995). The average Chinese enjoys a life span 10 years longer than the average citizen in any other developing country (Wei, 1998).

The government made vast commitments of finances and personnel toward the health care of its urban employees and their families in the first three decades of the People's Republic when state work units were the sole employers in cities (City University of Hong Kong, 1999b). Urban residents enjoyed free medical care as part of their workplace welfare benefits from the government in the period from the 1950s till the introduction of economic reforms in the 1980s and 1990s. The system quite smoothly provided for the needs of urban residents when they were all affiliated with

government work units. However, the urban health care system started to prove inadequate in the era of reform since it did not cover the expanding numbers of private enterprises and individual entrepreneurs (City University of Hong Kong, 1999b).

Social changes over the last two decades have resulted in uncertainty about how health care should be handled by the government. The most significant factor affecting the supply of health care since reform has been the changing climate of financing (Pearson, 1995). In the last decade relative costs of health care have increased two or three fold (Tang, 2001). The greatest concern of citizens is how they will afford medical bills now these are no longer automatically covered as they were in the past (China Research Centre, 2001) Such costs are a major drain on personal savings.

Although reforms to medical insurance began in the 1980s, they came later than changes to other social welfare measures such as aged pensions and unemployment insurance. Trials of potential innovative new schemes have been conducted in various parts of the country under the total direction of the central government (China Research Centre, 2001: 73). One scheme which commenced in Shenzhen City in 1995 required employers to deposit six to 10 per cent of their workers' average annual wages into an individual medical savings account which could be used to pay medical bills. However, the scheme failed because it managed to enrol less than 10 per cent of the population even though its target was universal coverage. Most joint ventures and private firms refused to join it (Chow, 2000). New systems have been intended to provide basic medical services for all workers, irrespective of whether they are state or non-state affiliated workers, with individuals having to assume a certain amount of the cost of medical services (City University of Hong Kong, 1999b).

Demonstration health insurance projects initiated in 1994 in Jiujiang City and Zhenjiang City were more successful. They stuck to government guidelines that stipulated that the contribution of worker wages should start at one per cent and then be gradually increased. Less than a year after the project started 95 per cent of the eligible population in Zhenjiang had joined. Encouraged by this the State Council then decided to extend the scheme to other cities throughout China (Chow, 2000).

Reforms have acknowledged that the basic medical insurance system must be revised due to three major reasons. The high speed of ageing of the population is one while the other two are low production capacity and the large population overall (Wang, 1999c). As in Japan, the rising levels of aged in the community are pushing up health care spending. Older enterprises with a high ratio of retirees to workers face economic ruin if they do not rein in benefits, such as medical care, that account for a major share of their budgets. Fees paid for pensions and medical insurance and other employment related insurance still accounted for roughly 41.5 per cent of remuneration in the mid-1990s.

Salaries have been rising to partly compensate for the withdrawal of benefits such as medical care and low housing costs (Lin et al, 2001). The younger generation newly entering the work force may find this acceptable because they have not known anything else. Older workers and retirees who have assumed they would have no

problems receiving these benefits in their old age may find this harder to accept. They must also cope with having to pay for services they formerly received for free.

State Council regulations introduced in 1998 to cover the urban population stipulate that employers must contribute the equivalent of around six per cent of an employee's salary to medical insurance while employees must put in two per cent of their income. Contributions vary slightly for individuals above and below 45. Amounts are not fixed but are to be adjusted in line with fluctuations in the overall national economy (Wang, 1999c). This new scheme covers 43 million people (Tang, 2001). Personal accounts are to encourage individuals to be self-reliant (Chinese Academy of Social Sciences, 2000). From 1 January 1999 state owned companies were ordered to limit their reimbursements of medical bills (*Hong Kong Standard*, 15 December 1998).

A number of problems have emerged because companies have been unable to live up to their responsibilities as a result of debts. A 1996 survey in Dalian City in North-East China found that some firms had taken four to five years to come to grips with the medical costs of their retired workers but there have been worse examples in the hinterland (China Research Centre, 2001). Health care has been uneven in China and its coverage has been much smaller than that of other social programs. It has not moved ahead as smoothly as the authorities had been hoping that it would (Tang, 2001).

CONCLUSION

The task of funding and providing health services for their growing numbers of aged citizens will constitute a massive task for both China and Japan over the coming five decades. Both achieved remarkable improvements in the health of their citizens over the last five decades. The noteworthy drop in their mortality rates coincided with a fall in fertility rates and the rapid ageing of their populations. It remains to be seen whether they can be as successful in the years ahead.

The year 2001 was a notable one for Japan in terms of new examinations of health policy. In Japan the election of Junichiro Koizumi, a former Health and Welfare minister, as Prime Minister heralded the start of ambitious attempts to radically reform the medical and health insurance system. Proposals included raising the age for eligibility for special cover for the aged from 70 to 75. China is seeking to incorporate elements from a number of other nations into its health care policy.

In this chapter I have examined the provision of health care for the aged in China and Japan. Japan is much further ahead than China in this area, having made the aged a priority group since the 1970s, whereas China is yet to bring in specific health provisions for its elderly. Having both achieved remarkable extensions in life spans over the last five decades, they must now find the means to fund health care for the senior citizens who will constitute far greater proportions of their populations in the years ahead.

The topics of health care covers a huge area which I have been unable to expound upon fully in a thesis of this length. In the next chapter I look at housing for the aged in China and Japan, another subject that could be the topic of a thesis in its own right.

The situation of home ownership generally marks a major divergence between the two countries.

CHAPTER SEVEN: HOUSING THE AGED WITH TRADITION AND INNOVATION

INTRODUCTION

In this chapter I outline the general situation of urban housing for the aged in China and Japan and then go into more detail for each country. The differences between the two can be attributed to the disparities in their levels of economic and demographic development. While planners in Japan recommend that all housing be adaptable to the needs of the aged, China is still struggling to house city people generally. The majority of elderly Chinese and Japanese continue to live with their children in time-honoured fashion, but this practice may not continue. Many of the middle-aged in both countries say they would prefer to live apart from their children but near them in their old age.

In Japan the emphasis is on creating liveable environments for people at all stages of their lives. In China the push is on to move city dwellers from low rent housing, provided as a welfare benefit, to home ownership. More independent living arrangements in retirement complexes are being constructed but they are still largely out of the financial reach of average citizens in both countries. Many of the comments in this chapter regarding the actual physical situation of housing in urban China and Japan are based on my own personal observations while living in Beijing in the early 1990s and Tokyo and Osaka in the 1980s and brief return visits there in 2000 and 2001.

Attention to the specific housing needs of the aged is a quite recent phenomenon in both urban China and Japan. Housing policy in these group-centred societies was hitherto principally directed at the requirements of family units as a whole and not at those of separate family members such as children or aged parents. Governments, corporations and public housing bodies based their planning on the assumption that most of the elderly lived in multigenerational households. Consequently only a small number of poor senior citizens without kin warranted special provisions.

Now, however, the rapid ageing of the population and changing living patterns are forcing these two countries to revise their priorities and devise new measures for the aged. Predicted demographic changes mean that a much higher percentage of the elderly will be living alone or as couples in the 21st century than in the 20th century. Many more older Chinese and Japanese than in the past will not be sharing dwellings with their offspring as extended families. Both nations face the dilemma of how to house unprecedented numbers of senior citizens in independence and comfort. Governments and the private sector will be responsible for supplying affordable aged hostels, nursing homes and retirement villages for those aged who choose to live apart from their kin. They are looking to new ways to do so. In China, for example, small nursing homes may be funded by nearby business enterprises such as bicycle repair shops or restaurants operated by senior service groups (Arnsberger et al, 2000).

Japan is a long way ahead of China in terms of providing special housing facilities for the urban aged. China still faces the problem of how to create adequate housing standards for urban dwellers as a whole due to deterioration of housing stock (Zhang, 1998b). It is starting to open some special housing complexes for the aged, however.

All housing may have to be adaptable to the needs of the aged since most dwellings will at some stage have elderly residents as the population rapidly ages. Kose says all dwellings in Japan 'should be capable of housing an elderly person because sufficient special housing can never be built to house the one in four persons who are expected to be elderly' (1997:157). While the Gold Plan has been aimed at home welfare, the residences of many older Japanese are not suitable for home care according to Hayakawa (2000) who says their small size is the main reason for entry into institutions.

The range and choice of housing for the aged and other citizens remain more limited in China than in Japan as a result of greater government control over urban housing stocks, lower incomes and a still insignificant degree, albeit a rising one, of home purchase. Out of a population of 1.2 billion in China, only four million households had drawn on housing loans to take up the new option of home ownership as of mid-2000 (Zhang, 2000a). This number is set to rise dramatically as more home owners emerge, spurred on by rises in rents and the cessation of welfare housing.

Lack of space has been cited as a principal factor discouraging the tradition of co-residence of aged parents with their children in cities in both countries. The average living area per Chinese urban resident has been estimated at half that in Western countries but has been rising. In 1986 the Chinese government allocated an average 6.36 square metres of living space per individual in work unit flats (Lee, 1993). In 1999 the State Development Planning Commission minister announced that floor space per person exceeded nine square metres in 1998, ahead of target. He cited this as an indication of continued improvements in living standards overall (*Beijing Review*, 22 April 1999).

Japan gained notoriety in the 1970s for its so-called 'rabbit hutch' housing at a time when its growing economic might was being touted. A survey in the 1980s of housing of the aged in one Tokyo ward in the 1980s found their total floor space to range around 33 square metres, about standard for the city as a whole (Ninomiya, 1989). The average dwelling in Tokyo in the 1990s had a floor area of 72.8 square metres (Japan Information Network, 2001). Many older Japanese opt to stay in small inner city flats or houses when their children move to cheaper more spacious housing in the outer suburbs. Conversely the aged make up a disproportionately large percentage of the population in the countryside as their children move into cities in search of work. As a result of these two factors more of the aged are living on their own right across the nation.

Ownership of urban housing has marked one major difference between China and Japan to date. Whereas most Japanese have either inherited their dwellings or purchased them at great expense, the majority of urban Chinese have lived in very low rent state provided flats close to their workplace. Under state socialism housing has been regarded as a social good rather than an economic good (Zhang, 2000b). Private home ownership, which was outlawed when the communists came to power in 1949, has only been promoted by the government over the last decade or so.

The system of state allocation of flats often placed elderly urban Chinese in control of family housing in which they could provide cramped space for their children waiting

to obtain separate housing (Sher, 1984). Their position has been eroded recently as sharp rises in rents have been enforced to persuade citizens to purchase homes. With the drop in the worth of their pensions caused by inflation and their reduced control of housing, the aged may no longer be able to maintain their position of authority.

In contrast, private home ownership has been the social norm in Japan where housing has been held to be a personal responsibility. The obligation to request public housing or social welfare has been a source of shame (Jain, 1989). A comparable stigma has not been associated with company supplied housing which is nowhere near as widespread as in China. Moreover, hard-hit by recession, Japanese firms have recently started winding down the practice in order to cut down on costs (Ishibashi, 2001).

The majority of the urban aged in Japan own their own homes. A 1995 international survey of the aged revealed 84.4 per cent of the Japanese elderly to be home owners. The figure topped 95.6 per cent for those living in tri-generational households, while it stood at 57.9 per cent and 81.2 per cent for singles and couples respectively (Aged policy section, 1996).

Japan is a major world innovator in the area of technology assisted living that offers the potential to make life much easier for the aged whereas China, as a developing country, is still battling to adequately house all its citizens, both young and old. These factors highlight the economic gap between the two nations that otherwise share very similar cultural attitudes on the obligation of younger generations to care for their elders under the same roof. They are both trying to come to terms with new social trends.

JAPAN

Housing is one of the three crucial areas of social policy in which Japan has lagged behind other developed countries (Takegawa, 1999). The other two sectors of aged care and child care have reflected a failure to adequately cater to the ramifications of changing demographics. Since making a substantial start on expanding support for aged care in the 1990s, the government has turned to ramping up child-care provisions in order to encourage a higher birth rate.

In the period following World War II Japanese housing policy centred on the young families who created the baby boom. The aged were only a very small proportion of the population and, as in China during the same era, emphasis was placed on the young whose efforts would rebuild the nation. Most of the elderly lived with their children and did not draw on state assistance. Thus it is not surprising that public policy measures were not initiated to meet the special housing needs of the aged in Japan until the mid-1980s and only once the perceived other more pressing national goal of economic growth had been achieved (Kose, 1997). In 1987 the government started a new initiative for the aged with the national Silver Housing Project. Whereas previous state public housing schemes had given only limited consideration to the needs of the frail aged, it made them a focus of concern (Maeda & Ishikawa, 2000).

Over the last decade, policy focus has turned to creating special housing suitable for the aged. The Japan of the 1990s saw a rush to find innovative ways to facilitate

ageing in place at home as community rather than institutional care became the catchcry, as in the West. Builders must now incorporate provisions to enable the aged to live on their own or share space with other family members. Tri-generational homes that include separate living areas for aged parents and their children are popular in cities. New so-called intelligent homes have features such as surveillance systems that enable residents to maintain watch over the bedridden in other rooms (NHK TV, 13 October 2000).

Construction trends in Japan are tending toward more Western styles which incorporate some traditional Japanese features but also innovations for changing needs as people age. The postwar baby boomer generation, who will soon join the ranks of the aged, have more Western habits than their parents do. They are more inclined to sleep in Western beds rather than in traditional futons on the floor and to sit on chairs rather than cushions. Their children look set to be even less traditionally Japanese in their habits.

The present generation of elderly retain a fondness for traditional Japanese features in the home even though these impede their physical mobility. Although traditional squat toilets, for example, are considered ill-adapted to the physical needs of the frail aged, many are reluctant to change over to Western toilets. They also want to stay at home in familiar circumstances for as long as possible. Some prefer to go home to die on their familiar tatami mats on the floor rather than in the alien surrounds of a hospital on a hospital bed (Long, 1999).

The practice of sleeping in futons makes the task of carers more onerous as lifting an individual from the floor is far more difficult than from a Western style bed. The proper care of futons is also a physically demanding task for the aged who live on their own since it involves putting them away and then out again each day and also airing them in the sunshine at regular intervals. However, such work is considered essential in Japanese culture. The expansion of home helper services that can take over such tasks can thus be crucial in helping people to stay in their own homes.

Traditional Japanese style bathing also requires a degree of physical dexterity beyond some elderly Japanese. People first squat on a small stool to wash before climbing into deep baths to soak in very hot water and so must negotiate a series of levels. Research is being conducted into easier ways of washing the body that might make the process easier for both frail aged and carers. One alternative to the traditional bath developed with Ministry of Health and Welfare support by Matsushita Electric Industrial is a sitting shower which massages the whole frame from 10 nozzles. It raises the heartbeat to only half the rate that a bath does and features a safety device to automatically limit the temperature of the water (Panasonic, 2001).

Mobility is a major problem for elderly residents of traditional style housing unable to accommodate features such as wheelchairs and ramps. The rapid ageing of the population has intensified demand for barrier free housing and facilities (Austrade, 2001). The Ministry of Construction, which implemented a plan for the ageing society in 1995, is promoting interior design to maximise the time people can remain in their homes through flexible living space and removal of obstacles to easy mobility (Suzuki, 1998). Barrier free provisions are also being extended to public transport by the Ministry of Transport due to concern about the impact of an ageing population

(*Japan Times*, 30 November 1999). The push to create a barrier free society has even come to refer to all kinds of barriers, including psychological and social ones (Uranaka, 2000).

In 1997 the Ministry of Health and Welfare started a program for small residential homes and a growing movement of group carers are exploring alternatives to conventional institutional care using modified traditional Japanese surroundings. One male nurse who disagreed with the way institutions restrict inmates has set up a home in an old farmhouse, hoping its nostalgic layout might prove therapeutic (Akagawa, 1998). Another male nurse is adapting a house in Tokyo for the same purpose but in a practical manner. The bedroom floors, for example, are covered with a water-resistant material that resembles tatami but is more durable (*Asahi Evening News*, 27 February 1999).

A Kyoto based group that redesigns dwellings to make them suitable for the elderly or the disabled has a nurse and architect jointly work out the specifications (Mizuno, 1992). Adaptations to existing homes enable the use of wheelchairs where restricted space and changes in floor levels have previously impeded their use. Variations in levels start at entrances where people step out of their shoes and up onto the higher main level of the dwelling. They continue through a residence where rooms alternate between higher raised tatami straw matting and lower wooden floors.

Local governments have been subsidising renovations to make dwellings more liveable for the aged or disabled. Mayor Nakazato of Edogawa City in Tokyo became a pioneer in this regard in the early 1990s by introducing a scheme to reduce future social service costs by funding local residents to alter their homes. He thought it was worth investing three million yen in a family if an aged person stayed put, as an institution would cost the same amount for one year. Work was done first on baths and toilets and wheelchair access was a priority (Nakazato, 1992).

Inadequacy of housing conditions is the second main reason that forces the elderly into special homes. Lack of space exacerbates the first reason of strained family relationships. Problems can arise, for example, due to different waking and sleeping patterns of young and old members. The small size of rooms, which are suitable for a traditional Japanese lifestyle but not large furniture or special aids, also impedes the use of Western style beds, portable toilets and wheelchairs (Hayakawa, 2000).

Japanese companies are developing innovations to make it easier for the aged to stay in their homes rather than enter institutions. The relatively short life of many dwellings in cities like Tokyo could turn out to be an advantage in this context as fresh ideas can often be more easily incorporated into new dwellings than into old ones. The Tokyo Chamber of Commerce and Industry has set up an examination system to check the expertise of consultants who wish to engage in home remodelling. Such consultancy work could become as popular as nursing care work (*Nikkei Weekly*, 21 July 2000).

A new type of welfare worker has been created recently in the form of housing environment coordinators. They arrange alterations to make dwellings barrier free and suitable for the use of nursing care equipment in conjunction with long-term nursing care scheme care managers. A coordinator can also provide information on welfare

facilities, insurance and welfare services. The workers are graded into three ranks, with nationwide exams having already been held for the lower two ranks and to commence for the top rank in 2002. Entry to the work has no educational, age, sex or nationality restrictions according to a pamphlet released by promoters of the course in 2001.

The number one worry aged Japanese cited about their homes in a 1995 international survey was the need for maintenance and repair work. The second major concern was lack of adaptability of homes to their special needs (Aged policy section, 1996). Around 62 per cent said they would prefer to remain where they were even if they experienced a physical decline that made wheelchair access and domiciliary care essential. Only 8.6 per cent would consider going into a nursing home but 17.6 per cent would consider entering a hospital (Aged policy section, 1996). Such preferences originated mainly from social pressures to preserve face since nursing homes are seen as a last resort.

Although extended households are on the decline in Japan, more than half the aged continue to reside with one of their children. By tradition, the oldest son has assumed he and his wife and children would live with his aged parents to provide them with financial and physical support and companionship. Such men have planned their careers on that basis in my experience. This topic was outlined more fully in chapter three.

Changes in lifestyles, however, are affecting shared living arrangements and thus the place of aged parents in the home. Whereas it was formerly common for several family members to sleep together in a room that served another function during the day, contemporary families have developed a desire for greater privacy for individual members. For example, separate bedrooms are now considered desirable for children to enable them to study harder for the exams that will determine their future success in a society where graduation from the right university is so important. Elders who must enter an institution for short-term care sometimes discover on their return that their former room has been allocated to a grandchild who is at a crucial stage in his or her education (Hayakawa, 2000). Thus children have priority over the aged in a household. This contrasts sharply with the situation in China where lack of accommodation and finances have made it quite common for grandparents to share rooms with grandchildren.

Tri-generational urban Japanese families now need homes large enough for all members to be comfortable. As housing sites in Japanese cities are too small for major additions or Western size separate granny flats, Japanese companies have developed temporary small prefabricated rooms. Daiwa says its units merit their rental price which equals that of some apartments as the rooms offer features such as bathtubs that are wheelchair accessible. M.O. Marine Construction is using old transport containers from ships that incorporate airconditioners for the same purpose (*Japan Times*, 30 July 1999).

The Japanese government has encouraged the continuation of extended family living arrangements since the practice eases the potential load placed on official agencies. It also accords with a Japanese style of welfare that from time to time is espoused as being superior to the Western welfare state. Some authorities have been offering

financial incentives to sustain the tradition. The Japan Housing Loan Corporation, an official affiliate, introduced a preferential loan program for households with an aged member as early as 1972 (Kose, 1997). The two-generation mortgage they offer enables families to build dwellings to accommodate two separate households with their own living areas.

Homes built using the special mortgages must be over 125 square metres in area. The longest period for a loan is 50 years for a sturdy non-wooden construction not threatened by fire, while wooden inflammable dwellings have a maximum loan period of 40 years (Inoue, 1997). Adequate provision must be made for separate autonomous living areas for both aged parents and their children with their own kitchens and toilets. One bath is permitted (Kono, 1999) as families retain the Japanese custom of bathing in turn in the same water. In 1995 the Housing Loan Corporation made installation of barrier free provisions to enhance mobility of frail members obligatory for the loan scheme. Revisions in 1996 stipulated that the most preferential rate would go only to applicants who put in barrier free, energy conservation or durability designs.

It is hoped that this type of policy will result in more general housing becoming appropriate for senior residents as the proportion of aged in the population rises (Kose, 1997). Although an official advisory panel recommended in late 2001 that the corporation be abolished, as part of general reforms, it also acknowledged that special loans for the elderly, disabled and low income families should be provided by some sort of government organisation.

Not all family members are happy about shared living arrangements, however, and intergenerational tensions do arise. Japanese magazines often feature tips for a stress-free existence for mothers-in-law and daughters-in-law under the same roof (Kono, 1999). There is now even a special magazine called 'Daughter-in-law v. mother-in-law' which sells 100,000 copies a month (Fujisaki, 2001). These publications counsel the cultivation of patience by a daughter-in-law when dealing with relatives from another generation. The prospect of having to look after a husband's parents is said to be one main reason that is putting women off marriage.

According to Ministry of Health and Welfare figures there were 5.07 million aged parents living with their children in 1980, while there were 5.35 million and 5.65 million in 1990 and 1997 respectively (*AERA*, 15 September 1999). Thus the number of aged parents living with their adult children has been on the increase, although this trend cannot be guaranteed to continue indefinitely. The proportion could change in the near future when the current middle-aged retire, since most of them do not favour living with their children but would prefer to be independent. A survey done by the Urban Development Corporation in Tokyo in 2000 found that only 28.1 per cent of respondents aged from 46 to 64 would choose to live with their children, but 58.5 per cent wanted to live no more than 30 minutes away from their offspring (*Mainichi News*, 16 May 2000).

They fit the model epitomised by the Japanese proverb of kin living so close that soup does not get cold when carried from one dwelling to another, which symbolises continued solicitude for parents not under the same roof (Ben-Ari, 1991). The same proverb is quoted approvingly by a Chinese writer when voicing his concern that the

extended family may be superseded by the nuclear family in China. He would like to see a Japanese model hold sway in China since it accords with local tradition (Du, 2000).

Workers in both Japan and China have benefited from cheap housing supplied by their workplaces but its range has varied greatly between the two countries. While all urban work units in China have given such housing to their staff, only a relatively few large Japanese corporations have done so. In China this housing has effectively been granted for the full term of a worker's life, sometimes being handed down to children, but in Japan employees have been expected to move out and purchase their own homes prior to retirement (Izuhara, 2000). The Japanese aged do not live in company housing.

As is the case in China, Japanese workers can no longer count on obtaining corporate allowances for housing. An increasing number of firms are abolishing these to reduce expenditure in an era of recession. 'We are no longer living in an age when people rely on company housing,' said Ishii about his firm which is rolling over equivalent funds into salaries to compensate (*Asahi Evening News*, 10 March 1999). Many large companies are selling off their housing units in bulk to streamline their balance sheets although they are still renting some flats to employees (*Nikkei Weekly*, 18 June 2001).

In Japan public housing, like community-based nursing care, is run by local government authorities. It is also offered by the Housing and Urban Development Corporation, another body the Koizumi government proposes to abolish. The two supply a mere 4.9 and 2.1 per cent respectively of total housing stock. This low percentage can be ascribed to the successful promotion for several decades of the benefits of home ownership in Japan despite extremely high home purchase prices (Izuhara, 2000). Nevertheless public housing has formed an important provision for the aged because the needs of them and their families have been made a top priority within it. Managers have tried to keep families together. In 1969 paired apartment units were introduced so the elderly could live next door to their children (Kose, 1997). The practice has proved popular with small flat dwellers who want to maintain close contact with aged parents but feel they lack sufficient space to have them inside the same unit.

Since the late 1970s publicly funded but privately operated supportive housing projects have been targeted at retirees. Urban high-rise blocks of flats feature a range of accompanying support and recreation facilities. They have continued to sell well through the recession even when housing sales have been down in other areas. In 1990 one such new complex in Yokohama sold out in three hours at a time when condominiums for families were taking three years to sell (Yagi, 1992). However, such private project retirement flats can be afforded only by the minority of very affluent older people as purchase costs for life occupancy are very high as are monthly maintenance costs. There is still insufficient housing for low to middle income older renters (Izuhara, 2000).

The relatively small number of Japanese aged who are neither entitled to public housing nor have been able to afford to purchase their own homes, and so must rely on renting private properties, would seem to be the worst off. They face not only difficulties paying rents but also overt discrimination. A Tokyo government 1992

survey of real estate agents found that half the respondents would not rent properties to the aged, citing potential illness as one reason. Agents worry that they may end up having the responsibility for individuals who lack family to take care of them. The authorities in places such as Kawasaki City have been attempting to end such discrimination by threatening punitive measures (Nakamura, 1999).

Retirement villages are not as common in Japan as in Western countries but began appearing in the late 1970s (Christopher, 1984). Due to the high cost of urban sites these are mainly located in more remote parts of the country. They have become a source of revitalisation for rural communities facing economic collapse and loss of services due to young people moving to cities to find work. Retirement villages have also provided alternative life choices not available in the cities for the urban aged (Matsumura, 1998). There has also been a move back to rural hometowns by middle-aged workers on the verge of retirement in order to be close to ageing parents and escape the stresses of urban life. Training courses in mini farming have been started for these people who will join the ranks of the aged themselves in the not so distant future (Ogawa, 1999).

The first major study written in English about a Japanese retirement community (Kinoshita & Kiefer, 1992) covered what was only one of 31 such places in Japan at the time. The majority of residents were relatively well paid professionals who could afford the high entry and living costs because they had sold their highly valuable urban dwellings. Most were childless, making them atypical of the aged population as a whole. The majority of Japanese aim to leave their greatest financial asset, in the form of their home, to their offspring. Thus they would have more difficulty raising the entry fee for such a community. Life care and condominium types have been the most popular. The drawback is that residents usually must leave the latter if they become too frail to maintain independent living as these have only minimal medical services (Kinoshita & Kiefer, 1992). The introduction of better access to home help under the new long-term care insurance may alter this situation by making it more practical for people to age in place.

Recent new housing initiatives include rental or purchase dwellings designed specifically for the aged (Izuhara, 2000). Life care communities are being constructed as special projects by local governments which also have responsibility for the new long-term care insurance scheme. One of the first, built by Kobe City, features a nursing home and day care centre on the lower floors with units for the independent aged on the upper floors. A life support adviser checks the health and safety of residents while the centre offers other support services such as meals, bathing, rehabilitation and recreation (Kose, 1997). Such places are filling a void for specialist centres for the needs of the aged.

CHINA

In Chinese cities, where most residents lived in state provided and subsidised housing from the 1950s on, no special provisions have been made for aged housing until quite recently. Subsidised housing enabled retirees to enjoy housing security with very low rents under the old system. Its abolition in the late 1990s, accompanied by pressure to purchase homes, will impact on the living standards of the aged over the next few decades. The most affected will be the current over 40-year-olds who began work in

the pre-reform era. They formerly expected the low rent system to provide them with secure housing for life and thus made no provision earlier on in their work lives for any alternative. Younger people who have grown up in the reform era and are just starting their careers are more optimistic about their prospects of becoming home owners (*Beijing Youth Daily*, 10 May 2000).

Efforts in the late 1990s by the Chinese government to force people to buy their housing initially met strong resistance. Residents accustomed to paying only a minute fraction of their income in rent were not happy to suddenly find they were being pressured to part with substantial amounts of cash to become home owners. Rents had been low for so long that they regarded them as a right rather than a benefit. Even in the aftermath of the introduction of reform in the 1980s average rent still accounted for a mere one per cent of income (Zhang, 1998b). Rents went up in the 1990s and by June 2000 were equivalent to 6.28 per cent of monthly income in Beijing (Tang, 2000). Ever higher hikes were envisaged to make purchasing more attractive than renting.

The practice of low rent was reinforced by the state Marxist ideology that maintained subsidised rent, along with other welfare subsidies, as compensation for low wages (Wang & Murie, 1999). Housing shortages led to older workers sharing their limited space with adult children who had nowhere else to go because work units did not possess enough housing for all their workers. People had to put up with very poor and cramped housing conditions, often having to share basic facilities on a communal basis as they had no kitchens or toilets in their individual units (Rosen & Ross, 2000). Even now many elderly urbanites still have to leave their homes to use public baths or toilets (Arnsberger et al, 2000). The low rents also led to a lack of funds for building maintenance and new construction, factors that are cited as necessitating the privatisation of housing if any improvements are to be achieved (Wang & Murie, 1999).

The reform of housing can be traced back to Deng Xiaoping's remarks in 1980 that rent should be adjusted to make it profitable for residents to purchase their homes (Lee, 1993). Deng said that, if rents remained low, there would be no incentive for people to buy their housing. The subsequent debate led to an extensive attack on the welfare system overall (Zhang, 1998b). In 1994 the government asserted that the goal of privatisation of housing involved change from a welfare system to a market system (Zhang, 1998b). At that stage specific reference was made to the needs of the aged.

Privatisation of the housing market has not as yet resulted in the immediate complete elimination of welfare housing. Work units are continuing to subsidise their members by selling them flats they procure at commercial market prices at greatly reduced rates (Zhang, 2000c). Moreover, the lack of a uniform nationwide housing system means that in some areas older workers still enjoy advantages that have been stripped from others elsewhere. For example, in Guangzhou, people employed prior to 1997 can opt to remain in the old housing system (Lee & Xiao, 1998).

Historically, the severe housing shortage in China in the second half of the 20th century, coupled with the fact that some older workers had retained the comparatively larger residences they received early in their working lives, contributed to a high degree of co-residence of children with aged parents. A 1988 city survey found that

32 per cent of the aged were housing children because they could not find their own housing, while 21 per cent were doing so to relieve the burden of housework on their working children. Only 15 per cent of the aged living with their children required financial help from them and a mere five per cent were living with them for the sheer pleasure of it (Du, 2000).

As noted in chapter three, elderly parents often take on responsibility for their grandchildren by having them live with them during weekdays or weekends or even on a permanent basis. In addition, even when their grandchildren are not residing with them the elderly sometimes house the young carers their children employ for their own household (Yuen-Tsang, 1997).

Aid given in the form of housing creates obligations across the generations. Studies have shown that aged parents who share flats with their offspring in urban China receive more money from them than those who live apart from their children, although the reverse is the case in other industrialising countries in Asia. (Lee and Xiao, 1998). Domestic financial transfers in China appear to occur in exchange for sharing housing. Elderly parents who help with housework are also more likely to receive money from their children (Lee & Xiao, 1998).

Yong, the director of the policy research department of the China National Committee on Ageing, says young couples live with their parents not because of filial piety or family tradition but because they cannot afford to rent or buy a place of their own. Employees of work units have long regarded their low-cost flats as a way to help out their children by passing on tenancy rights to them (Huang, 1999b). Their children, in return, have seen co-residence as providing a means whereby they can call on their parents for assistance in bringing up their own youngsters. Some aged parents have even been agreeing to move into special aged housing so they can hand down their work unit apartments to their children (Zhang, 2000c).

Chinese citizens currently in their fifties seem more inclined to consider living in special aged housing than their elders, so demand for it is likely to rise in the future (Lee & Xiao, 1998). Moreover, in the more affluent areas of urban China many of the aged do not want to live with their children. A 1997 survey in Zhejiang, for example, showed that one-generation households predominated in 57.9 per cent of elderly households. Two-generation households came in at 18 per cent and three-generation households stood at 23.3 per cent, while 54 per cent of the aged said they did not want to share housing with their children (Zhang, 1999b).

Recent years have seen the promotion of the creation of special housing for the aged. A symposium held in Beijing in September 1998 by the China National Committee on Ageing investigated the feasibility of building senior citizen apartments nationwide. They would be available for rental or purchase and offer the services of home helpers for residents who became incapable of looking after themselves (Zhi, 1999). Since the late 1990s official attitudes have relaxed with regard to responsibilities for elder care with suggestions that families may justifiably place their senior members in old people's homes (Huang, 1998). New complexes devoted to the needs of urban aged fit this description but their costs are prohibitive for pensioners. Some residents say that life there is better than in their former family homes as it is more conducive to study and other personal interests (Joseph & Phillips, 1999).

The first apartment blocks specially designed for senior citizens in China opened in Anhui Province in eastern China in 1986 (CCTV, 19 October 2000). National standards on community planning are to demand reservation of space for aged housing and activity centres, with easy access to day care and transport, when new residential buildings are designed. The layout of rooms should be flexible enough to meet changing needs as residents age (*China Daily*, 7 October 1998). Preferences should also be taken into account. For example, elderly Chinese do not like large rooms because they can seem empty and they also prefer sunny aspects (Huang, 1999b).

Old age homes are expected to form a lucrative market in the near future but currently accommodate only a tiny fraction of the nation's aged. For example, at the end of 1998 Beijing had 289 rest homes that accommodated 6,732 elderly people, with 3,588 of those places self-funded. The number of people aged 60 and over in the city was predicted in 1999 to reach 2.3 million in 2000. Less than one per cent of the aged reside in aged care facilities across the nation (Zhang, 1999b) compared to approximately five per cent in most Western countries.

The cost of many centres lies beyond the financial reach of most present urban Chinese retirees who have counted on the state to support them in their old age. They could not have known earlier in their lives that the authorities would wind back their substantial housing benefits. In their younger days institutions were designed only for the destitute without families. Some stigma still exists about using such places. Families face loss of face in their community for seeming to abandon ageing relatives to them. Conditions in centres for the aged vary greatly as do their costs, with the cheapest between 400 to 500 yuan a month and the most expensive up to 1,200 yuan a month (*China Daily Business Weekly*, 13-18 June 1999).

Nevertheless, there are now more than 40,000 retirement homes across China and acceptance of them among the broader population is growing. 'Before neighbours would look down on you if you sent your parents to a retirement home but today people are more open-minded,' says Luo, the manager of one such home in Beijing. His firm has tried to break down prejudice by creating traditional courtyard style housing where residents resemble one big family (Jiang, 2000).

The maintenance of reciprocal obligations remains important when it comes to housing. For example, one resort style retirement village in Zhuhai gives permission for grandchildren to live there with their grandparents, providing a kindergarten as a drawcard (Old People's Paradise, 1999). Thus their residents can follow the common practice in China of retirees assuming the care of young grandchildren to relieve the burden on their own children.

Local governments are building retirement village style districts. The Beijing municipal authorities were the first to do so by choosing a 30-hectare site in the countryside outside Beijing known for its hot springs. Aged housing at Xiaotangshan ranges from traditional Chinese courtyard dwellings to European style two- and three-storey villas, with the latter resembling buildings at the Zhuhai village mentioned above (Han, 1995).

CONCLUSION

In China and Japan the percentage of the aged who share housing with their families is falling but it is still much higher than in Western countries. More elderly Chinese and Japanese are starting to choose to live on their own and the practice is becoming increasingly socially acceptable. The rapid ageing of the population in both countries is leading to a new focus on the special accommodation needs of senior citizens, both in the community and at special centres.

The more industrially advanced Japan is making rapid progress in the area of special housing adaptations to make life easier for the aged and their carers. It could easily become a world leader in this field through the R&D investment being made by major Japanese corporations. Zhang (1999b) points to the achievements of Japan in this regard when contemplating the present situation in China. Both countries must ensure that their elderly citizens have access to adequate housing and that housing stocks can be readily adapted to their needs as the aged continue to account for an ever larger proportion of households in the community.

China and Japan, like the West, perceive housing as no longer a domain quite separate from health and long-term care (Pynoos & Liebig, 1995). Future dwellings will need to provide access for community welfare and health services for the aged who wish to age in place.

In this chapter I have examined urban housing in China and Japan for the aged. Faced by predictions that all housing will hold elderly residents at some time, the Japanese government is pressing for all dwellings to be adaptable to the needs of the aged. The elderly do not form a priority for the Chinese government, whose main efforts at the moment are to turn city residents from recipients of cheap welfare benefit housing into home owners.

Most of the elderly in both countries continue to live with their children but this tradition is expected to decline in future years. Many Chinese and Japanese born since World War II do not anticipate living with their children when they reach old age. In the future more of the elderly will live on their own or in special retirement complexes. Developments in Japanese technology may allow them to do so for longer.

CHAPTER EIGHT: CONCLUSION: THE AGED: FUTURE BURDEN OR CHALLENGE?

In this thesis I have examined the position of elderly urban Chinese and Japanese and how the impact of rapid ageing is changing them and others in their societies. The shift to a higher ratio of older citizens in comparison to younger members of the community is a direct result of below replacement fertility rates and marked advances in longevity. It will necessitate a broad rethinking of social policy by the Chinese and Japanese governments to cope with the transformation that may result.

The wide scope of the topic covered has led me to limit my chapters to the issues I consider most crucial to it. I have covered the specific areas of carers, employment, retirement and pensions, medical care and housing, all of which could easily be the subjects for theses in their own right. Other important themes such as the impact of demographic change, economic development, globalisation, gender and intergenerational justice have emerged. In this chapter I will provide a summary of my thesis that touches on its key points.

China and Japan, two nations which share a common cultural heritage derived over thousands of years but quite different economic and political backgrounds set in place in the last century, are actively developing fiscally sustainable social policy to handle demographic change in the coming decades. Japan is well ahead in terms of special provisions for the aged, including an innovative new long-term nursing care scheme begun in 2000. China is still struggling to set up national social welfare and health cover for its population as a whole and is yet to target the elderly as a group except in the area of pensions. It will soon face the old age burden of a high income country with the resources of a middle income country.

Neither nation can afford to ignore the mounting demographic pressures that constitute their major social challenge in the 21st century. In the last century they demonstrated an ability to adapt. In the process of rebuilding in the aftermath of the devastation caused by the Second World War, both countries introduced public health measures that took the average life spans of their citizens from around 50 to the present world record highs of 84 and 77 for Japanese women and men respectively and to the seventies for Chinese. By about 2025 Japan may be the most elderly nation percentage wise in the world while China will continue to possess the greatest sheer weight of numbers of aged (Phillips, 2000).

The balance of retirees to workers may turn these nations into places where overly high dependency ratios put unsustainable burdens on their economies and citizens. They will have to either turn to new labour sources or lift the age of retirement to prevent the decline of their work forces. Japan faces this prospect in the near future, with the working population predicted to start to decline in 2007 (Ogawa, 1998). While China has several decades still to go before the same phenomenon occurs, the authorities indicated in 2001 that residence registration that prevents rural people moving to cities will be lifted to allow a needed inflow of labour into urban areas.

To deal with the challenge posed by population ageing, both countries are drawing on their own traditions and ideas from outside their regions, including from Western and non-Western countries. They display a 'genuine desire to understand fully the realities

as well as the rhetoric of the welfare states in other parts of the world ... (Goodman et al, 1998).’ Japan has historically been willing to adopt and then adapt aspects of other cultures. In the 19th century the West was the source of this inspiration, while in the 8th and 9th centuries China supplied the inspiration for far reaching innovations in Japanese culture such as the writing system (Dalby, 2001).

Although China and Japan have operated under quite different political philosophies and possessed vast disparities between their living standards, they may now be drawing closer in terms of social policy. White (1998) wrote that the move by Chinese state from being a provider to a regulator of welfare services may indicate a degree of convergence of welfare systems in East Asia. Their systems of social protection, like those of other Asia-Pacific nations, face challenges as a result of globalisation (Saunders, 1997).

The role of carers and its link with gender forms another important dimension. Women constitute the main carers for the aged and also the main members of the older age group but their position may shift as demographic ratios change. The postwar Japanese welfare state was centred on a corporate based framework which ‘relied heavily on a rigid gender order within and outside the home’ (Shaver & Peng, 2000: 78) which kept women in the carer role. Now, however, corporate Japan is gradually looking to women to meet anticipated labour shortages while the state is assuming a greater responsibility for the provision of care for children and the elderly (Shaver & Peng, 2000). Gough points to the decline of ‘grandmother welfare’ in East Asia as a possible source of more demand for state services there (Gough, 2000: 201). Such care has made it easier for urban mothers to work full-time since the 1950s.

In both countries, where marriage has been universal, wives have been expected to look after their husband’s parents who have customarily resided with them. Both China and Japan have lauded their cultures as providing admirable sources of respect for the aged and family care for elders through this process under which the ‘sandwich’ generation feel duty bound to look after both their parents and their offspring. While most aged Chinese and Japanese still prefer to live with one of their children, this preference may not hold among their successors in the 21st century who have been brought up in quite a different world. Many members of the present middle-aged generation in Japan say they do not want to depend on their children in their old age and would prefer to be independent, but would like to be near their children. Their urban counterparts in China hold similar attitudes.

Professional carers are assuming more importance in Japan with the introduction of the long-term nursing care insurance scheme. Most of these workers will also be women who will be paid for care they formerly provided to their own families for free. In China female retirees form the bulk of neighbourhood street committee workers attending to the needs of the aged. The profession of social work is only in its initial phases there.

In the area of work, China and Japan have higher levels of employment among older people than do Western countries. Japanese men believe that work keeps them healthy and it provides their social contacts outside the family. The Japanese government has been promoting the concept of greater job opportunities for older citizens and some financial incentives have been offered to entrepreneurial activities. However, although

in the long term older workers may come into demand to fill labour shortfalls, in the short term, record unemployment levels mean that many middle-aged and older Japanese who want to work cannot do so.

In China the present generation of retirees work in order to maintain their living standards as the value of their pensions falls. While ageing intellectuals are currently in demand because the Cultural Revolution halted education for the generation below them, ordinary older people cannot compete with younger Chinese for jobs. The policy of reform has both set them free to pursue private enterprise and also taken away the welfare benefits they formerly enjoyed.

In the areas of pensions and of medical care, the sheer increase in the ratio of older citizens to the younger work force over the first half of the 21st century is said to threaten the future viability of maintaining or even extending present levels of state benefits for senior citizens. The Chinese and Japanese governments are introducing policies that will increase mandatory individual contributions to social welfare insurance during income earning years so funds do not fall too dramatically as the pool of contributors falls with the ageing of the population. There is some alarm that unduly high levels of payouts could create intergenerational inequity. China and Japan share a concern that the sharp rise in the proportion of retirees in their populations could push up funding of pensions to unsustainable levels if drastic changes are not made to their social security systems. Their citizens continue to sustain high levels of personal savings as they worry that pensions will not be sufficient to support them when they reach retirement.

While Japanese have been accustomed to making mandatory contributions to pension and health insurance funds for many decades, they are still a relatively new phenomenon for urban Chinese who formerly received benefits for free as a trade-off for low salaries. Japanese over 40 now must also pay contributions to the new long-term care insurance scheme. Even though people anticipate the future will see contributions climb, as the number of retirees compared to workers rises, they expect to receive lower benefits on retirement than their predecessors. China continues to emphasise the pursuit of a 'social security system with Chinese characteristics' (Chow & Xu, 2001). While the latter part of the phrase indicates support for traditional family care, the former implies active input by the state.

In the area of medical care China and Japan partly owe the rapid increase in their ageing rates to their remarkable success in implementing public health programs in the post World War II years. Japan has given the aged priority for nearly 30 years, having introduced free health care for Japanese 70 and over in 1973 when they were a much smaller percentage of the population than they are now, although it later had to re-introduce some fees for them. The government is now proposing to raise the age for elder health care to 75 as part of its efforts to rein in costs as the number of older Japanese sharply escalates.

The long-term nursing care insurance scheme introduced in Japan in April 2000 represents a major change, incorporating health and welfare services and an effort to broaden services to the entire population, relieving the private burden of families as carers. China has yet to make the aged a priority for health services. It has put in place

an urban medical insurance system with mandatory personal contributions to replace the previous work unit based system.

In the area of housing, China and Japan are both interested in catering to the accommodation needs of elderly citizens but China puts priority on overall housing renewal. Adaptations to make housing more liveable for older residents form a key feature of housing policy for the aged. The small size of urban housing in both countries restricts the extent of tri-generational households although these remain common. Differences between the two countries are largely due to economic disparities. While most elderly Japanese own their dwellings, home ownership is a new concept in China that would have been inconceivable for the present generation of aged during their working lives. The number of retirement complexes is increasing in both nations as more of the elderly opt to live apart from their families but such residences still cater to only a small affluent minority on the whole.

Demographic pressures caused by the marked increase in older people over children could ease in the long term if birth rates rise. In the short term there will be no change. All the people who will join the ranks of the aged in the first half of the 21st century are already alive. The governments of China and Japan possess opposite attitudes to birth rates. In Japan the state has been trying to encourage women to have more children to stop the feared repercussions of population decline. It cannot, however, force women to have more children if they do not want to have them. In China the authorities have been able to force city women to stick to having only one child. Liu (1998) believes that a two-child policy might be brought in for urban areas around 2005 to raise the fertility rate from 1.3 to 1.8 and thus slow down the ageing of the population.

The Japanese government's new strategy for economic growth includes positioning care services for the elderly and infants as the main generators of new jobs for the young (Takada, 2001). The aged could thus provide employment for younger Japanese for whom unemployment is a major threat in the short term. In the long term the country must either face a sharp drop in living standards or bring in workers from outside to fill gaps that will emerge. China, as a nearby neighbour, could be a source of these.

The wide disparity in incomes between China and Japan will continue to influence the relative living standards of their respective aged. Although the economy of China has been rapidly expanding, Chinese workers still receive extremely low wages compared to those in the developed world. In the pre-reform era, Chinese retirees were assured of adequate incomes to sustain their basic needs but welfare benefits under these have been slowly stripped away. While new pension measures should cover younger Chinese by the time they retire, the interim generation who started work under the old system form a problem for the government which must provide pensions for them while trying to amass funds from contributions for the future.

The year 2001 saw the governments of China and Japan announce plans to build up their social insurance systems to meet the long-term needs of their citizens for economic security. Both announced the results of their year 2000 national censuses which showed that birth rates remained low while the population above 65 had the highest growth rate.

Following his unexpected selection as Prime Minister in April 2001 Junichiro Koizumi proposed a series of wide-ranging reforms to try to lift the Japanese economy out of recession which included health, housing and social welfare programs covered in this thesis. The 2001 annual white paper on economy and finance released in early December 2001 warned that failure to carry out fundamental structural reforms would devastate living standards (*Mainichi Shimbun*, 5 December 2001).

China has yet to make the aged a priority in planning except in the area of pensions. The nation is pushing ahead with reforms in health care and pensions but it will be quite some time before they cover the entire population. The nation is moving from a comprehensive enterprise based pension model to a more decentralised social insurance model (Tang 2001).

Ultimately, however, there is a limit to what governments can do. While statutes can be enacted to forbid mandatory retirement ages or discrimination in job hiring, legislation alone cannot stop older people continuing to be passed over in favour of younger job applicants. Gillion et al (2001) note for the International Labour Organisation that 'an ageing society need not face any crisis as long as it is able to provide jobs for its ageing work force' (2001: 50). Neither China nor Japan can achieve this goal in the conceivable near future as they both struggle with unemployment problems.

In 1981 a new novel entitled 'Pension collapse', set in the year 2000, created much discussion in official circles in Japan. It envisaged a Japan engulfed by 'a flood of government deficits, inflation, unemployment, loss of work ethic, intergenerational conflict, and a host of other social pathologies' (Campbell, 1992). It is now 2002 and some of these things have come to pass but the pension system has yet to collapse.

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In compiling the bibliography for this thesis I have encountered a number of problems connected with working with Chinese and Japanese language sources.

In most cases there has been no English translation of titles so I have supplied my own translation along with a transliteration of the original Chinese or Japanese title. In these cases I have placed my own translations and the original titles in brackets. I would hope that in this way the reader might gain a clear idea of the theme of a book and also be able to check my translation against the original title. In the case of articles from Chinese journals I have 'edited' the 'Chinglish' translations provided for them.

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