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### Challenges for the aging family in the People's Republic of China

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## **Influences on and challenges for the ageing family and older persons in the People's Republic of China**

### **Abstract**

The People's Republic of China now has the largest population of older persons of any country. It is also a nation which has experienced enormous economic, social and demographic changes over the past three and a half decades. Traditionally, the family was the main social support for older persons; this changed somewhat under early socialism but, in recent years, the importance of family support has been reasserted. However, over this time, the family's ability to support its older members has been considerably altered and arguably weakened. This paper reviews four key issues (population change, the *hukou* system, economic reform; general features surrounding modernization) that have gradually changed families' capacity to provide support for older members. The paper considers research foci and public policy directions under which the state might take some responsibilities from the family, support capacity to care, and improve the quality and quantity of support for older citizens.

Key words: China, ageing population, family structure, family support

## **Introduction**

The People's Republic of China (the PRC) is recognized as having become an ageing society since the last few years of the twentieth century. Due to the very large size of its total population, at over 1,370 million persons, the PRC now has the largest population aged 60+ of any country globally. In 2014, its population aged 60 or over was 201.3 million, accounting for about 14.4% of the total population. This proportion is expected to reach 32.8% by 2050 (Global AgeWatch Index, 2014). Over the past two decades, life expectancy at birth has also increased substantially, from 68.55 years in 1990 to 74.83 years in 2010 and is expected to rise to 78.8 years by 2050 (National Bureau of Statistics, 2013; Zeng and George, 2002).

The PRC has aged demographically principally because of drastic fertility declines driven specifically by population policy and socio-economic development over last three decades. Mortality decline in the PRC has also played an important though probably statistically lesser role in this demographic ageing. China particularly exemplifies the adage of 'developing countries growing old before they grow rich'. Despite enormous economic development and increases especially over the past three decades, the PRC's per capita income is still only between one-quarter to one-sixth of that in many Western industrialized countries (Feng and Mason, 2005; World Bank, 2014).

Perhaps more important socially, however, is that whilst rapid development has been felt by almost everyone, it has benefitted some groups far more than others. Income distribution in the PRC has become very skewed, as in many rapidly developing economies. China has a relatively small number of rich people and a growing middle class and, whilst it has been noted that incomes have increased for both rich and poor groups, the rich have benefitted

most in the past two decades. China's gini coefficient (used as a measure of income inequality) steadily increased between the early 1980s and 2008, since when it has slightly steadied but at relatively high level, indicating considerable inequality. This index shows many households are still living in relative poverty. Inequalities are seen particularly in urban-rural differences in incomes, as per capita urban incomes were estimated as more than three times higher than for rural households in the early 2000s and even higher subsequently (Sicular, 2013; Li, Sato and Sicular, 2013). Indeed, burgeoning inequality (and the fear of social disorder it could cause) has become an important policy concern and it also has been found that income inequality affects the health of older people (Feng, Wang, Jones and Li, 2012). Ironically, urban-rural income and social welfare differences are explained at least in part by policy, in the *hukou* system discussed below (Sicular, 2013). These rural-urban differences are important for family and social care, as rural areas are the locations where many older persons live. A conflation of many factors combines to make China old but not wealthy socially and these impact on older persons and their families. These include marked imbalances in overall development, which is focused mainly in coastal regions and in some inland cities/provinces (Zhang and Zou, 2012), low coverage of pensions (particularly in rural areas) (Han and Wei, 2012), and high personal costs of medical expenses and sometimes the unavailability of medical services (Dong, 2009).

Traditionally, the family has almost always been cited as the cornerstone of social support for older persons in China, which is also the case in many East and South-east Asian countries (Mujahid, 2006; Phillips, 2000). The family is the fundamental unit in social organization and 'family' here refers to a group of co-residential persons who are based on marriage, blood, or adoption (Zeng, 1991). In recent years, the concept of family has not changed, but it has extended to recognize different living arrangements such as either co-residence or living

separately (in close proximity or at a distance). This acknowledges such changes especially in China many of which are underpinned by economic necessity, decreasing family size, changing norms and limited housing space, and also enabled by land reform which allows family member(s) to establish their own households more easily. A fundamental reason for these changes is economic necessity, resulting in work mobility and extensive labour migration, particular for rural persons (Hu, 2012; Kam, 2013), which have caused the ‘biggest migration in human history’ (Miller, 2012).

A traditional Chinese family usually included at least two generations (parent(s) and children) and it was also a very normal phenomenon for several generations to be living in the same household (Baker, 1979; Chu and Yu, 2010). Multi-generational (or intergenerational) co-residence with older persons had been an historical basis for China’s traditional family support system for elderly persons. The system ensured, or at least tried its best to ensure, that elderly persons received financial support, health care and daily associations with their adult children or extended family members as an aspect of reciprocal or filial duty. Older Chinese family members are or were bestowed the highest respect from family members and society.

Filial piety, the code of intergenerational duty, has been identified as the ‘essential ingredient’ that holds together the Chinese familial system of care (Zhan, Liu, Guan and Bai, 2006; Phillips and Cheng, 2012). Love and respect for older generations intertwine with the responsibility of children to support and take care of their parents, recognizing the care and devotion they received. Confucian teaching saw such mutual obligations as the fundamental philosophical underpinning of filial duties, which arose at all societal levels (Emperor to citizens; sons to fathers; husbands and wives and, today, children to parents more broadly).

The typical family model in China is sometimes termed a ‘feedback model’ as it involves reciprocal rather than one-way flows of filial duty, which can be expressed as  $F1 \longleftrightarrow F2 \longleftrightarrow F3 \longleftrightarrow \dots \rightarrow F_n$  (F = generation). This model means that generation F1 fosters generation F2; generation F2 maintains and takes care of generation F1 when F1 is older; the same relations obtain between generations F2 and F3, and so on (Fei, 1983).

However, during Mao’s era and especially since the more recent steep declines in fertility and the increased mobility of young adults, family care and care provision have changed greatly although perhaps not yet as substantially as they are likely to in the near and medium future. Previous, Chinese socialism especially under Mao stressed the crucial role of the state and Communist Party and tended to de-emphasize the importance of families in all areas of care. This was especially the case in the ‘iron rice bowl’ era of guaranteed jobs and pensions, particularly in the government sector and state-owned enterprises, when the state provided a cradle-to-grave service for (mainly) urban workers through an enterprise-based security system. Under that system, in rural areas, older persons could often obtain food as a form of economic security from their production brigade which could protect their basic standard of living in a collective-based social security system (Dixon, 1982; Wang, 2006; Zhang and Liu, 2000). All these provisions, in range and availability, began to reduce substantially with the advent of Deng Xiao-ping’s era of modernization and opening to the West, and the ‘responsibility’ system in agriculture, which effectively ended the collective farms. After the late 1970s, many features of the ‘iron rice bowl’ began to decline and most had effectively disappeared by the early 2000s. Many of the worst hit by this were older rural farmers without collective support and older urban workers who were not taken on in the new emerging economy (Bulard, 2006; Piquet, 2008).

Meanwhile, living arrangements may have also changed substantially in recent years, especially in urban areas, but families still remain an essential ingredient of and basis for old age support in China. Their basic functions are still now stressed by the Chinese government (Du and Phillips, 2004), even if there were the attempts to reduce this familial reliance in the Cultural Revolution era. Today, there is not a single model of filial piety in China or the Asia-Pacific region, and its practice can be maintained by self-interest, including devotion and economic motivators, and even sanctions (Ikels, 2004).

Some studies have noted that in China (as elsewhere), some better-off older persons may now prefer to live independently from their children (Sereny, 2011). This may also be forced upon some older persons, especially if their children migrate for education and work, which may raise living standards but reduces their proximity, as discussed below. It could also be by choice, as some older persons may prefer to live away from, or even independently from, their children and may not wish to be a burden on them. However, the essential role of family support for elderly persons has even been formalised in a national law, the '*Law of the People's Republic of China on the Protection of Rights and Interests of the Aged*'. This legislation was initially enacted in 1996 and was updated in 2012 and it requires adult children to ensure their older parents' financial and emotional needs are met. How this will work is as yet unclear but the law does state that employers must permit home leave for visits to older parents as required by the regulations (FlorCruz, 2013).

An important feature, discussed below, is that today's substantially smaller families mean there are fewer potential extended family members to personally support their older adults through co-residence. As a result, the responsibility for informal care falls squarely on the individual and his or her immediate family and, where no children are available, the

consequences can be serious. In addition, loss of a spouse (either through divorce or bereavement) often results in the older persons losing the support of their partner in their old age. Meanwhile, formal social security provision from the state for elderly persons is underfunded and underdeveloped (Feng, Wang, and Jones, 2013). Pensions are very unevenly distributed between rural and urban areas; in general, rural older persons are much less likely to have a pension (or a meaningful one) than their urban counterparts (Han and Wei, 2012). These differences are exacerbated as, in terms of medical expenditure, people are suffering increasing and relatively very high out-of-pocket costs, particularly in rural areas (Dai, Zhou, Mei, Wu and Mao, 2012; Dong, 2009). This currently means that the formal benefits many elderly persons actually receive from the state are minimal. A confounding feature is that different welfare and pension systems and subsystems are emerging in the various provinces and vary especially amongst the large and more prosperous cities. A universal rural pension has been proposed, although its value is minimal, as discussed below (HelpAge International, 2013) and there are moves towards integration of urban and rural pensions (China Daily, 2014) although how and whether this will be implemented is yet to be seen.

Underlying the key challenges of ageing for the state and families in China today are population dynamics and socio-economic change. The increasing number of older people and the gradually rising life expectancy, coupled with the socio-economic trends discussed below, combine to provide enormous challenges to the family's current and future ability to support their older persons. This paper identifies and reviews four main factors impacting on the capacity of families to provide old age support in the PRC now and into the near future. It also aims to highlight a research agenda focusing on their consequences. The four main issues identified are:



- i. the impact of population change (population policy and social and economic development) and especially effects on demographic structure;
- ii. the impacts of the continuing *hukou system* (household registration system)
- iii. the effects of economic reform (*open door* policy), coupled with
- iv. the diverse effects of modernization.

### **Current and future challenges for family support**

Although the family still retains the main role as the support provider, emotionally and practically, its ability to support older persons has almost certainly been considerably influenced by these factors now considered in more depth.

#### *1. Population change, fertility decline and smaller family size*

Before the establishment of the PRC in 1949, China's average annual population growth rate was only 2.5 per thousand (Zeng, 1991), due to a combination of high birth and high death rates. This changed fairly rapidly after the mid-1950s as mortality decreased, though with some regression during the famines of the late 1950s and early 1960s, leading to an annual growth rate of about 0.6% in 2013 according to UNESCAP (2013).

Figure 1 and 2 demonstrate population trends from 1949 – 2012 and Total Fertility Rate (TFR) from 1950 – 2010 in China. In terms of population trends, there were two baby booms before the onset of continuous fertility decline as a consequence of socio-economic development and the very strong one-child policy implemented in 1979. The first boom was during 1949 to 1957, with fairly high births (32 – 38 per thousand) and declining death rates; as a result, natural grow rates were high, at around 16 per thousand. In the later part of this period, the PRC government started large-scale publicity campaigns and training of 'birth-

planning' personnel. With the 'Great Leap Forward' of 1958 and the subsequent coalescing of natural disasters and food production mismanagement, in the ensuing three years, the death rate increased remarkably (to 25.4 per thousand). Consequently, China's natural growth rate of population fell to -4.57 per thousand from 1958 to 1961.

The second baby boom was from 1962 to 1970 when birth rates were high (33.4 - 43.4 per thousand), and improving living conditions (especially after the Cultural Revolution) led to the death rate falling to 10 per thousand. The State Council in 1962 began a birth-planning campaign which included family planning measures, promoting contraception and late marriage. Unfortunately, just as this campaign was starting to show results, the Cultural Revolution swept the nation from 1966, disrupting this campaign along with almost all areas of education, health services and social life in general. Birth planning was lifted in the Cultural Revolution, and the natural growth rates rose to around 25.5 – 33.3 per thousand (Figure 1). At this time, the TFR remained high, at between 5.5 and 6 children per woman (Figure 2).

When social conditions settled down again, between 1970 and 1979, the natural growth rate decreased as a result of decreased birth rate, which reached around 11.6 per thousand in 1979 (Figure 1). There is also an obvious, steady decline in the total fertility rate during this period. China's TFR was 6 in 1970, falling to around 3 in 1980 (Figure 2). The fertility decline was due to the combined effects of both increasingly strict family planning policies and improving social and economic development. The so-called '*Wan-Xi-Shao*' policies (usually called 'late-spaced-small' families) were initiated in the period to 1979 as a concerted family-planning campaign which made great impacts on reductions of the birth rate, and the natural growth rate. *Wan* refers to late marriage (mid-twenties for women, late twenties for men); *Xi*

refers to long birth intervals/birth spacing (3-4 years); and 'Shao' (literally, 'small') means fewer children (no more than two children per couple in urban and three in the rural areas).

By 1979 onwards, at the start of the implementation period of the so-call economic reforms and the one-child policy, the cohorts of children born in the 1950s and 1960s were beginning to reach marriageable age. The natural growth rate fluctuated in the first ten years (1979 - 1987), and then decreased, falling to under 10 per thousand after 1997, a decade and a half into the one-child policy (Figure 1). In terms of fertility, since 1979, the TFR constantly decreased and dropped below 2.1 (so-called 'replacement level') in the mid-1990s. By the end of the first decade of the 21<sup>st</sup> century, the TFR was estimated at around 1.6 children per woman (Figure 2). Population policies in the PRC have attracted considerable and ongoing criticism and debate. They have been justified by data indicating that, prior to 1978, even if each family had been limited to two children, the growth in population would still have been huge. Many estimated that resources would be overwhelmed. In mid-1978, therefore, the Chinese government decided on the infamous one-child policy, launched in early 1979 with the avowed aim of controlling the population. This policy allowed couples to have only one child; the main target was urban residents and government employees, both more 'controllable' groups. Some modifications to the policy's application have emerged over the past 35 years, including some variations between provinces. For example, couples in urban areas may be permitted to have a second child in certain cases: at least a five-year gap between the first and second child; if the first child were physically or mentally challenged; if couples were divorcees or when both came from one-child families. The bigger variations have been between urban and rural areas, as rural folk, especially farmers, have been allowed to have a second child after five years if the first-born is a girl (Mamdani, 2006). The small percentages of 'ethnic' Chinese minorities (non-Han citizens) in the PRC were generally

outside the remit of the policy and they could have several children. Social and economic development also played an important role in fertility decline in this period. Similar to many richer countries elsewhere, social and economic development in China is negative associated with the fertility rate. Indeed, it has been found to have played a decisive role in the transition to below-replacement fertility in some provinces in China (Cai, 2010) and particularly has influenced a more general acceptance of fewer children.

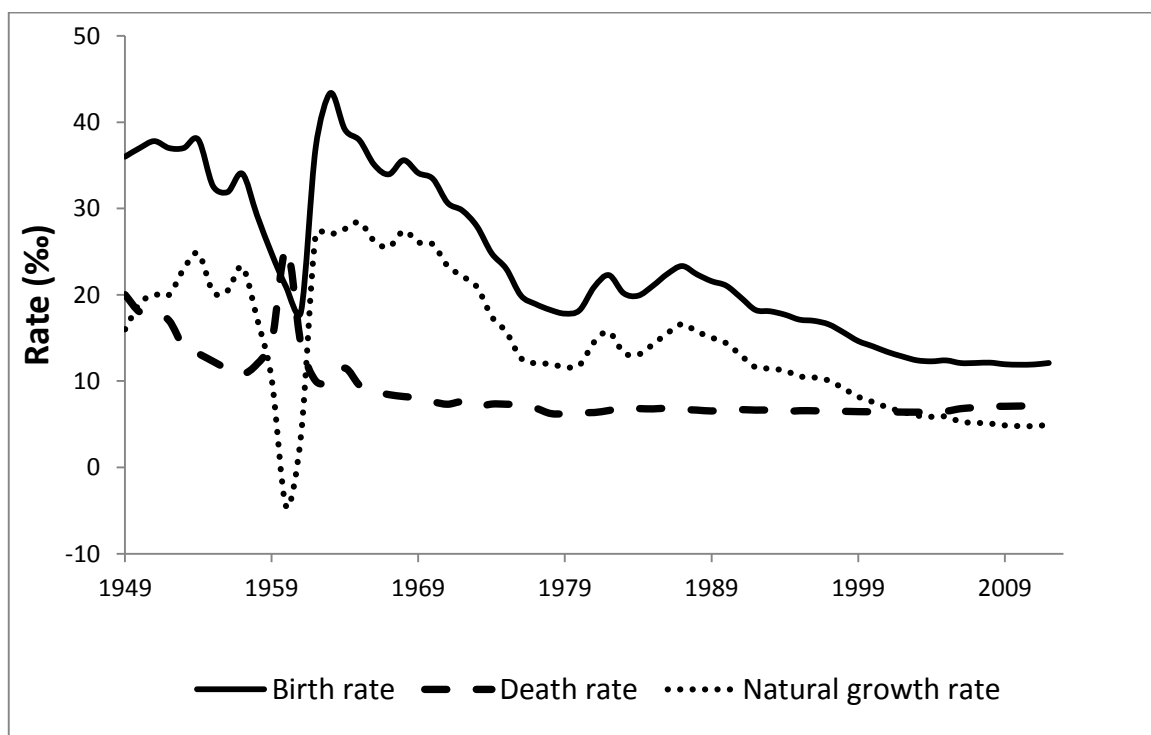
Whatever the exact causes, it is clear that steep fertility decline has resulted in fewer children in almost every family, which has greatly reduced family size and transformed traditional Chinese living arrangements. The average family household size was 4.4 in 1982 and had decreased to 3.1 in 2010 (National Bureau of Statistics, 2013). This inevitably has social impacts. Fewer children per household almost inevitably means fewer carers and less immediate family support for elderly members (Zhan, Feng, and Luo, 2008). Even with the relaxations of family planning policy noted above, further relaxed in late 2013 so that couples of whom one is an only child can have two children, the total fertility rate will be above 1 for some time. Over time, however, the often-cited '4-2-1' family structure seems to be emerging, meaning four grandparents, two parents and one child. In this, a couple (two persons) could potentially be responsible both for the care of one child and up to four grandparents, and even some may have surviving great grand parents. This would also imply the only child will eventually have to support his/her two parents and possibly four grandparents, as well as being part of a smaller working generation contributing to production and taxes. Moreover, the child will have no siblings with whom to share filial responsibilities. In combination with the absence of a meaningful universal old-age pension (discussed below), China's considerable fertility decline therefore sets the scene for high pressure on adult children for financial support, health care and daily social care for older relatives in future. Whilst

probability analysis of life tables, death rates of older persons and later age of child-bearing in China have suggested that the impact on old age support of the 4-2-1 structure may not be as severe as some have predicted (Jiang and Sánchez-Barricarte, 2011), the general trend is still a very important consideration.

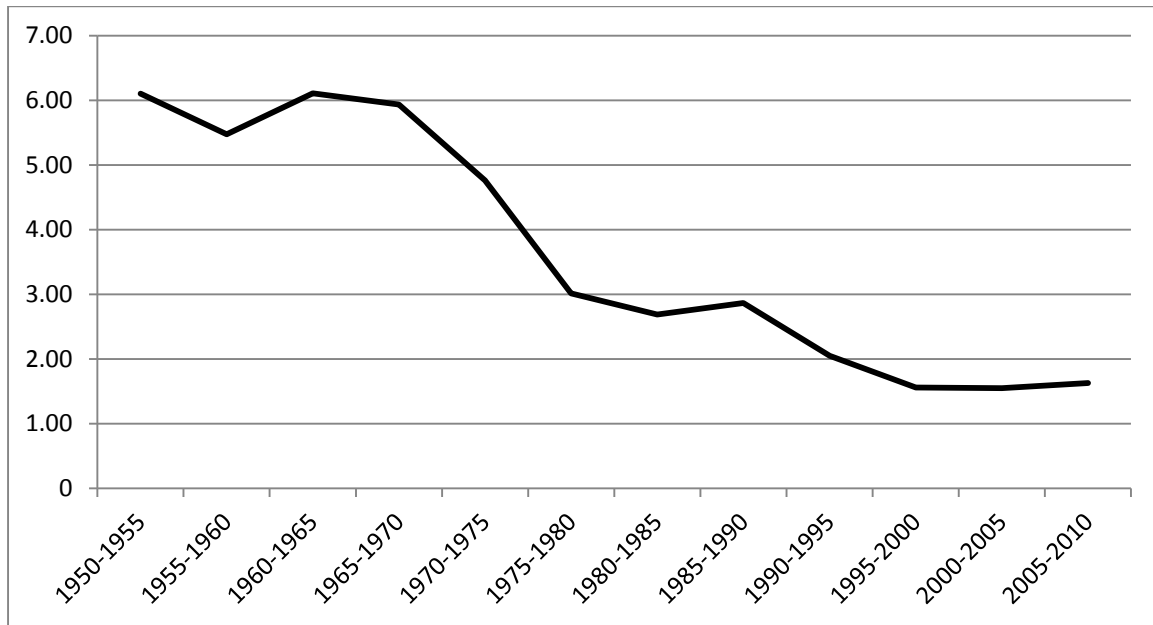
Moreover, and potentially even more serious, the one-child policy has also had the unintended consequence of seriously distorting the country's gender balance in the generations born since 1979. China, like several other Asian nations, has a long history of son preferences and the economic realities favouring sons in China (Ebenstein, 2010). For several decades, the number of male infant births registered has exceeded the number of female births. The sex ratio was 116.9 in 2000 (Goodkind, 2011), and it has been estimated that there are about 9.2 million 'missing girls' among children aged 0–18 in 2000 census (Ebenstein, 2010). The gender imbalance is estimated to have slightly increased by 2011, to around 117.8, but is still enormously different from the 'normal' birth ratio of 105 males per 100 girls (Cheng, 2013).

The growing gender imbalance has been a cause of considerable concern amongst policy-makers, academic researchers and the media for over a decade. In general it has been termed 'the missing girls', a phenomenon to be seen in India and elsewhere (McCracken and Phillips, 2012), but particularly markedly in the PRC. It is seen as particularly disadvantageous for the family care of rural elderly people if they only have a daughter, because the custom in China is patri-local residence which generally means daughters leave home to live with and care for their husband's family. Comparatively speaking, elderly people living in urban areas perhaps have been thought likely to have fewer problems than those living in rural areas, because for urbanites, custom and practice are changing and son preference is probably less marked

(Bartlett and Phillips, 1997). Nevertheless, an acknowledged and considerable gender imbalance has emerged over that past three decades. A previously underestimated but socially serious consequence is that, in a country like China, where marriage has been almost universal, official estimates suggest that by 2020, there could be 24 million males unable to find a marriage partner (Cheng, 2013). Whilst current data suggest the gender imbalance may be stabilizing or slightly reducing, it is still very likely to persist for a complex range of social and cultural reasons as well as official attitudes to the topic (Eklund, 2011). This gender imbalance is unprecedented and its social, economic and care consequences, especially for older parents with a single son, are therefore very difficult to predict and are likely to worsen over the next two or three decades. So, the phenomenon has very considerable and unpredictable implications for social patterns and behaviour in the future. Problems are likely to be greater for parents with an unmarried son than for those whose sons are married. Specifically in terms of care for older parents, the unmarried future cohorts of males will have no spouse or female offspring to assist them.



**Figure 1 Birth rate, Death rate and Natural growth rate of China's population, 1949-2012**  
 (Sources: data from National Bureau of Statistics, 1988 and 2013)



**Figure 2 The evolution of China's Total Fertility Rate (children per woman)**  
 (Source: United Nations, 2012)

## 2. *The impacts of the hukou system*

The *Hukou* (household registration) system is used to register the residence all Chinese citizens and classifies (or divides) citizens as ‘non-agricultural *hukou*’ (urban households) or ‘agricultural *hukou*’ (rural households). It has long been recognized as an ‘invisible wall’ between the rural and urban sectors as place of residence gives access to certain levels and types of services and benefits. In recent years, urban-biased policies and development which have been concerned primarily with economic and political stability in urban areas, have exaggerated the gap between the urban and rural areas (Zhang and Zou, 2012; Miller, 2012).

The *hukou* system has at least two major impacts on the family's ability to be involved with an increasingly ageing population. First, apart from the effect of population policy (one-child policy) on the rate of population change, the population's *hukou* status also has relations with population change. In particular, it has been found that a higher percentage of agricultural

*hukou* is associated with a higher total fertility rate (Cai, 2010). Conversely, a higher percentage of non-agricultural *hukou* (urban households) is associated with lower TFR. This is related to the fact that rural-agricultural families are more likely to be permitted a second child (e.g. if the first child is a girl). In the urban areas, the one-child policy has generally been far more stringently enforced and smaller families accepted, as noted above, hence giving lower urban TFRs. So, fewer children are available in almost every urban family to support older persons than in rural families. This greater stringency in application of family planning for couples in urban and rural areas is very likely hastening the formation of the 4-2-1 family structure in urban areas.

Second, urban-biased policies have protected urban residents' welfare systems and prevented rural residents from participating in the welfare system and benefits in urban areas if their *hukou* registration is elsewhere. Urban elderly residents are now being fairly well covered by the social security system, including health care, pensions and education (for children, freeing them from costs and responsibilities). By contrast, new migrant workers (many of whom are former agricultural workers and with rural *hukou* status) in urban areas are far less likely to be covered by the urban social security system or given access even to education for their children. This has been a long-recognized source of complaint, severe grievances and dissatisfaction. The Chinese government has for some years been discussing reform or even abolition of the system and, whilst most commentators deem full liberalization rather unlikely, developments in late 2014 discussed below may indicate more serious changes may occur.

At the root of urban-biased policies, the *hukou* system aimed to restrict the movement of population, particularly of labour from rural to urban areas, to protect the urban welfare system. It initially resulted in surplus agricultural workers remaining in rural areas before the



economic reforms (Wang, 2006). However, over the past decade or so, the demand for labour from the burgeoning factories especially in China's eastern seaboard provinces has made wages so attractive that many rural *hukou* residents have migrated to urban areas and paid for their own healthcare and education when they could not get access to the state facilities. By contrast, urban residents have previously had the privilege of full employment, rising wages and, formerly, comprehensive welfare cover often based on the 'iron rice bowl' official employment or employment in the state-owned enterprises mentioned earlier (Liu and Wu, 2006) or simply from their urban *hukou* giving access to health, welfare and education. Even though there was growing demand for labour after the first decade of economic reforms, the state still implemented a full employment policy to provide posts for workers in urban areas (the 'iron rice-bowl') and steadfastly maintained the *hukou* system to prevent the sharing of jobs and benefits with rural migrants in the urban labour market until the 1990s (Liu and Wu, 2006).

Thereafter, the state somewhat loosened the *hukou* system to facilitate the movement of labour demanded by the ever-growing industrial development and the ever-increasing non-state private market. China's boom was giving annual economic growth rates of 10% or more until 2008, which had settled by 2013 at a still high level of about 7.7% (IndexMundi, 2014). Nevertheless, although rural migrant workers may work in areas classified as 'urban', they still effectively treated as 'peasant' by the *hukou* system, and receive unequal treatment in policies such as employment opportunities, welfare and simply their right to live in urban areas (Wu, 2001). Because of the current extreme difficulty in transferring one's rural registration to an urban one (even though a person may have lived, worked and paid taxes in an urban for many years) and the concomitant difficulty in transferring one's pension across cities until 2010, most migrant workers are far more poorly covered by the pension scheme

and consequently less willing to participate in the pension system (Wu, 2013). Hence, rural elderly people and rural migrants face a severe lack of economic security from the social support system, and they are more likely to rely on their families for economic support when they lose their physical ability to work (Cai, Giles and O'Keefe, 2012). In December 2014, the authorities announced another review of the *hukou* system to potentially grant urban status to rural migrants (Li, 2014). However, this may not be accepted by rural people as it could involve them giving up rights to their rural land even if they could then access urban welfare services. In addition, this review only focuses on current working age rural migrants and may not cover returning or older migrants, those less willing or able to contribute for at least 10 years to the urban pension, so its effect could be limited.

At the moment, therefore, the system certainly increases the pressure on the family to provide financial support to their elderly members. By contrast, urban residents have been far more likely than rural residents to receive proper pensions when they retire and they can therefore lead more secure and independent later lives with a reasonable standard of living (Du and Phillips, 2004). As discussed below, a universal rural pension has gradually been implemented since 2009, though its minimal value means it will have little real impact.

### 3. *The impacts of economic reform (open door policy)*

China has effectively adopted a market-based economy rather than a fully planned economy since 1978. Initially, many of the effects of the open economic policy were focused on selected cities and several Special Economic Zones principally on the eastern seaboard of China, such as Shenzhen (north of Hong Kong), Zhuhai (north of Macau), and Xiamen. Subsequently, the nation's socioeconomic system has radically altered. The government's 'central task' as outlined by Deng Xiao-ping became to encourage people to get rich,

inevitably allowing some people and some areas to become rich far earlier than others (Qian and Xu, 1993). For most Chinese people, whether urban or rural or coastal or interior residents, politics, economic opportunities and social norms have become fundamentally different over the past thirty-five years.

Economic reform has led to China's emergence as a modern-day economic miracle, with the World Bank predicting it may rank as the major global economy perhaps as early as 2015, though some suggest 2021 is more likely (Giles, 2014; The Economist, 2014). However, social changes have also been as great, or greater, even if political reform has lagged. One of the major social impacts of the economic changes has been on the family's ability to support their older persons. This is to be seen particularly in two features:

1. Reforms of the old age security system (especially pensions) and health insurance/coverage mean large numbers of older people do not have sufficient pensions (and some still have none) and there is vastly reduced affordability of health care, and frequent difficulty in accessing health services;
2. Spatial/geographical disparities in economic development have grown and led to marked increases in family 'splits', separations due to migration for work.

Economic reform (as it is called) has been accompanied by enormous changes in social security for both working age and retired groups. Given the unequal institutional arrangements (eg urban/rural, private/state sectors) and unbalanced governmental expenditure on social security provision, many older people are not covered by a pension scheme. Han and Wei (2012) reported that fewer than a quarter of the elderly population had a pension, ranging from some cover for two-thirds among urban older people to under five per cent

among rural elderly residents although, as noted above, the new rural pension system will ultimately give a very small pension to most rural dwellers.

Prior to economic reform, most urban workers (notably, civil servants, employees of institutional units, and employees of urban enterprises) received cradle-to-grave cover from an enterprise-based security system provided by enterprises or work units. Their pension was based on years of employment and their wages before retirement. After 1978, only civil servants or employees in institutional units were still fully covered by the state budget for their pension scheme. All the others were placed under the 'Old Age Insurance' (a contributory pension scheme funded by employers and employees) or, increasingly, were left to their own individual responsibility. Increasingly, the state has been unable to operate the numerous state-owned enterprises (SOEs) under central control and has had to delegate control to enterprises' managers. However, many SOEs are inefficient and effectively bankrupt. The enterprises no longer met production planned by state and have had to face serious market competition from home and abroad for the first time. As many SOEs have accumulated huge financial liabilities for the retirement pensions of their retired employees and other forms of social welfare for current workers, many enterprises have had to make workers redundant and radically transform their social welfare provision. Many enterprises have simply been unable to meet commitments and have closed down. Many workers were only to receive a delayed or bankrupt pension fund just before the enterprises have closed (Jackson, Nakashima and Howe, 2009). Although the State Council expanded 'Old Age Insurance' to cover the employees of all types of enterprises in 1999, the system cannot cover laid-off workers from the bankrupt SOEs and private employees who retired before 1999. These elderly people who are now not covered by pensions are more likely to be thrown onto their families for financial support.

In rural areas, many people previously worked in People's Communes (collectives) prior to the 1979 reforms of agriculture. Peasants had been encouraged to give up their land (their traditional source of security) and join the cooperatives through the promise of a welfare system that would provide security for the old, the sick, the widowed, the orphaned and the handicapped by 1957 (Dixon, 1982). Cooperatives owned the land and other basic means of production and organized peasants to work together and underwrote responsibility for those in need of welfare support (Wang, 2006). In this period, a shift in welfare responsibility occurred from the family to the commune (Dixon, 1982). Although it was a low-level collective system, older rural people could obtain food as basic economic security from the People's commune that could also protect their basic standards of living (Zhang and Liu, 2000). After the economic reforms and the introduction of the 'household responsibility' contract system after 1979, responsibility for social security for rural people has basically shifted onto the household, based on farmers' own resources. Although there have been some pilot projects for establishing old-age insurance in rural areas since 1986, the percentage of farmers insured by these was very low due to poor management compounded by institutional and policy changes from the government (Wang, 2006). Only 7% of the rural population participated in the old age insurance scheme in 2007 (Ministry of Labour and Social Security, 2008). Cai et al. (2012) found that 92% of rural elderly people rely either on income from continued working or on their family for their primary source of financial support. Unsurprisingly, therefore, because of reducing ability to work, older-old rural elderly persons are even more dependent on support from their family members than younger-old rural persons (Cai et al., 2012).

This has become an important socio-political issue in recent years and pension protection for rural residents was included in the 11<sup>th</sup> National Five-Year Plan (2006 to 2010). Most notably, the ‘New Rural Old Age Insurance scheme’ was introduced in late 2009. This is fully subsidised by the central government in poorer western provinces and funded by both central and local governments in the richer eastern regions. However, the vast majority of farmers will still receive only very low incomes from such a scheme and they are more likely to choose the minimum option in the New Rural Old Age Insurance scheme due to their current financial ability and lack of trust in this system (Wu, 2013). Some traces of the traditional rural support remain, but only rural older people who are childless or disabled are still promised the so-called ‘5 guarantees’ from the civil affairs at the county level (food, clothing, medical care, fuel and burial), as their sole form of social security. The implementation of the universal rural pension scheme for rural dwellers has accelerated since 2009, and it is hoped to achieve complete cover by 2020. On paper, this may reduce rural-urban inequalities amongst older persons somewhat but as the value of the rural pension is only 55 RMB (approximately US\$8.80) per month (HelpAge International, 2013), it is in effect of minimal value in an increasingly expensive economy. In many ways, the amount provided by the New Rural Social Pension Scheme is therefore more symbolic than practical.

Health insurance has undergone similar radical reforms or changes since 1978. After that date, the health care of only employees of government and state institutions were fully financed by central and local governments and other people were either introduced to a Basic Health Insurance Scheme (BHIS, a contributory health insurance scheme funded by employers and employees) for urban residents or a New Cooperative Medical System (NCMS) for rural residents. Meanwhile, the subsidies for public health from the government have also changed greatly since 1978. The state set low prices for health services before these reforms;

thereafter, the state no longer set prices for health services and allowed health facilities to work on a profit basis for drugs or new and high-tech diagnostic services, with fees allowed to rise over and above cost to enable health facilities to survive financially. There is on paper high health insurance coverage, with 68.4% of the urban population covered by the BHIS, and 97.5% of the rural population covered by the NCMS in 2011 (National Health Services Survey, 2012; National Bureau of Statistics, 2013). However, public health facilities rarely offer services at the basic costs and stories of excess charges and of the need to pay doctors separately for health care services are rife. This has stemmed from the limited government funding for public medical and health care and the ‘liberalization’ of the system over the past few decades. The PRC subsidies for public medical and health care were only 6% of national government revenue (National Bureau of Statistics, 2013) and thus medical expenditures are now the major barrier for people in accessing quality health care services and some suffer from very high out-of-pocket medical expenses (e.g. Dong, 2009). This can particularly affect rural *hukou* people living in urban areas, who cannot access even the basic public facilities. Moreover, the Chinese media regularly reports growing violence against health care staff by dissatisfied customers, indicative of deep frustration with the system (Huang, 2013). Neither has the theoretically high coverage of NCMS in rural areas led to improved access to formal medical care or great improvements in health conditions (Lei and Lin, 2009). Indeed, rural older persons in particular are more likely to report unmet needs for hospital services than urban older persons due to the limited protection offered by the NCMS for rural elderly people and their inability to pay extra for out-of-pocket expenses (Dai et al., 2012).

### *Impacts of migration after the economic changes*

The incremental economic reform was initiated in coastal provinces and state policies were initially heavily biased in favour of the coastal regions to attract foreign investment and

export-oriented activities (Zhang and Zou, 2012). Although economic reform subsequently extended to some inland provinces during the 1990s, including efforts to attract investment to the far Western provinces, the coastal provinces have benefitted far more than inland areas from the modernization phenomenon. Given their geographical advantages and more developed social and economic environments, the eastern seaboard provinces and towns have been far more attractive to foreign direct investment (Zhang and Zou, 2012). A major social consequence is that, ever since the implementation of the Open Door policy, China has been a nation of people 'on the move'. Migration, principally for work in the rapidly growing modern industrial areas, has led to enormous growth in cities such as Beijing, Shanghai, Guangzhou and Shenzhen. These are well known but many surrounding smaller towns have also benefitted and urban-industrial growth has spread extensively into surrounding areas on the eastern seaboard, which have effectively become urbanized. The migrants who have fuelled this huge growth of urban and industrial areas have come both from local and very distant rural areas (i.e. Skeldon, 2012).

A second related impact of economic reform on family's ability to support their elderly persons is thus from the family splits caused by migration. These separations result mainly from the increasing demand for labour in urban areas and coastal provinces and, given that the *hukou* system no longer restricted the migration of labour even if it did not allow transfer of social welfare benefits, millions of young adults have left their homes and migrated from poorer rural areas to smaller and larger towns and rapid economic development areas. Moreover, many have gone overseas for education or to live, as a result of greater incomes following economic growth. This migration phenomenon has further diminished many families' ability to support their older members, especially in rural areas.



It has also been widely noted that rural-urban migrants are less likely to participate in the pension system as it is currently difficult to transfer one's pension between areas. Although the majority of rural-urban migrations are young, and will earn good incomes compared to those in their former rural areas, they are at high risk if they lose their jobs or lose the ability to work. Financial coverage for those who are either laid off or unable to work is minimal. This has caused concern and the Chinese authorities are attempting gradually to improve social protection although this is imposing extra costs and taxes on employers and is sometimes resisted by employers in the private sector.

The earlier reforms of the pension schemes mean that most rural residents do not have adequate pension protection and no longer enjoy the previous benefits from the collective farms. Many residents in rural areas have become what are called 'left behind' persons, and many are already elderly or in middle age, which will inexorably increase the pressure for finance support from their families. Indeed, Xinhua News Agency (2011) reported as many as 40 million older persons 'left behind' in rural areas in 2011. At present, such persons are often supported at least partly by remittances from their child(ren) working away in the new economy.

Whilst it is recognized that migrants often send remittances home, for food, clothing and living expenses, distance and the 'family splits' mean there is a distinct of physical care for their older parents and it is such practical and day-to-day care that is often compromised by family splits. For example, the lack of a nearby relative to assist when an older family member is hospitalized is crucial, as there is often the need to provide food, bedclothes and even personal nursing care in Chinese public hospitals. It is almost impossible for the children in split families to perform their practical filial duties in a traditional sense, so there

is now some informal relaxation of expectations and there is growing popular belief that filial piety can be ‘substituted’ by cash remittances. Yet there is an inherent tension for children as mentioned earlier, since the law in China now expects children to care for and visit their parents. Unfortunately, however, even remittances may be under threat. Because of the higher living expenses in urban area, and the *hukou* system restricting most rural residents from accessing the urban welfare system, some migrants have to be cautious about both bringing family members with them and how much they have available to send back home. Education costs have become a particular pressure point (Gao, 2013), as private school fees are much higher for the children of migrants in urban areas as their children generally are not allowed to attend urban state schools; and health care is a similar issue. Therefore, often, their school-age children remain in their home villages and have care provided by their grandparents, and Gao (2013) notes estimates of 55 million children left behind in the care of relatives or neighbours. Many rural areas have effectively a missing generation of working age people, and are inhabited by older adults and children below university age.

It has therefore become very common for children to provide money for their older parents who take care of their grandchildren in return. This intergenerational reciprocity not only ensures some financial stability for the family but also can improve the well-being of the older persons (Cong and Silverstein, 2008). On the other hand, because of these financial obligations, many older persons have to care for grandchildren which may lead to both physical and emotional pressures (Wang, Zheng, Kurosawa, Inaba, Kato, 2009). Self-support is nevertheless probably the most common economic resource for many ‘left-behind’ older persons and, as discussed, support from local government or pensions is very limited or non-existent, especially in terms of rural old-age social care (He and Ye, 2014). He and Ye (2014) also note that rural-urban migration has degraded the well-being of some ‘left behind’ elderly

people. Although many such older persons are able currently to look after themselves, a growing danger is recognized given the ageing of these cohorts who may be at risk when they lose the ability to work and especially those who do not receive remittances from migrant children. Their rural communities generally lack social support facilities especially, for example, for those with chronic physical illnesses or degenerative conditions such as dementia.

#### *4. The diverse effects of modernization*

In addition to these specific issues discussed that affect families' abilities to care for older members, a wide range of other factors have become evident in recent decades. Social attitudes are changing in China, as may be expected, and sometimes rapidly. Therefore, although residence with adult children has been a traditional and even expected living arrangement, in recent years, especially amongst older people of higher socioeconomic status there seems to be some preference emerging for independent living (Sereny, 2011). Living alone or with their spouse only is becoming both acceptable and even perhaps more congenial to many older persons in China, especially in urban areas, who feel they can have their freedom and enjoy a better quality of life. It has for some time been noted that having a spouse is the greatest guarantee of support in old age (Chappell, 1991), even if caring for an ailing spouse can be a source of stress and even increase morbidity (Umberson and Montez, 2010). A spouse may provide instrumental support, encourage a healthy life-style and promote health and well-being (Umberson and Montez, 2010). However, for some, this support may be in jeopardy as divorce has become more common with China's rapid economic growth and modernization over the last three decades, and legal changes have made divorce easier. The crude divorce rate (per thousand population) increased from 0.33 in 1979 to 1.59 in 2007, and reached 2.29 in 2012 (Wang and Zhou, 2010; Ministry of Civil

Affairs, 2013). Divorce may lead to the loss of a spouse's support in old age and disadvantage children. Yet worse, as daughters-in-law have traditionally been responsible for care of their husband's parents, divorce often deprives some older people of a potential carer.

Remarriage, formerly rare, has also concomitantly increased in the PRC over the last three decades with the percentage of remarriages among marriages increasing from 3.05% in 1985 to 10.24% in 2007 (Wang and Zhou, 2010). However, it is still less common among older persons and especially for older persons who have lost their spouse. The Chinese census of 2010 found that 27% of the elderly population are widowed. Yet, whilst a survey by the Chinese Academy of Social Sciences suggests that 80% of the widowed elderly people would like to remarry, fewer than 10% of them actually register for marriage (Wang, 2013). This is thought to be because older people in China encounter enormous obstacles and objections from their children when seeking remarriage, due to expectations and concerns over allocation of family assets, as well as housing and care responsibilities. Attitudinal changes that encourage widows and widowers to remarry could be one aspect of modernization that may potentially help reduce the pressure of providing support from children whilst improving quality of life. Remarriage was once a taboo topic especially among older generations but it seems that attitudes may be gradually changing in China as well as elsewhere in the region (Phillips and Cheng, 2012).

Social welfare institutions are growing as another option to assist older persons and support carers. The original objectives of old age residential institutions in China were to accommodate the 'three-nos' older people: those with little or no income, no living children, and unable to work. After the economic reforms, Chinese policies in rural areas allowed only elderly people who had no close relatives to reside in government-subsidized institutions. In

urban areas, there are however increasing numbers of private old age homes, with improving facilities, and institutional policies are relatively less restrictive. As a result, there are more older persons living in institutional settings, again something that was previously socially frowned on. By the late 1990s, many publicly-owned nursing homes extended their services to older people who could pay, by themselves or via their children (Gu, Dupre and Liu, 2007). This is also an important attitudinal and practical change and one that appears to be accelerating. In 2012, the number of beds in elderly care institutions reached 21.48 per 1,000 senior citizens (National Bureau of Statistics, 2013). This is still an area of some social controversy and residential care is also in need of improvement both quantitatively and qualitatively. It is, nevertheless, an area in which to expect major growth in the coming decade and its growth may well affect dynamics of family care as has occurred in the West.

### **Conclusions and a research agenda**

This paper has reviewed four important and closely interlinked areas of challenge to the family's ability to engage with an ageing population in China. Although the family's ability to support older persons is certainly weakening, families still remain the main source of social support for the older persons. The quantity of support from the state is currently too limited to provide much support for older persons in general and beneficiaries are relatively few. Traditionally, the family in China has been the cornerstone of social support for older persons. Moreover, its role and obligations have been legally defined and are increasingly emphasised by a state that recognizes the need but is not devoting the resources to this age group.

In spite of a continuing strong attachment to the concepts of family care and filial piety, many people of all ages now acknowledge it is time for the state to assume greater responsibility, to

relieve the burden, enhance the support for care when provided by the family and to improve the quality and quantity of public support for older persons. This leads to a major focus of future research based on the four areas discussed.

In particular, both the policy implications and means of implementing formal state care in a manner that supports family care must be investigated. The ways in which pensions and social care can be provided, extended and sustained are also a key research area. Another area of concern is identifying practical means by which the state can abolish the unequal institutional arrangements and unbalanced governmental expenditure in social security provision, especially to reduce disparities between urban and rural areas. The practicalities of reforming or even abandoning the *hukou* system are already under discussion but implementation remains as yet stubbornly a way off. Therefore, in the interim, means by which to provide practical support for split families in the modern economic boom is a related research priority. The practicalities of extending government expenditure for rural residents' pension schemes, again to reduce rural-urban inequalities, is a further focus.

Finally, research and policies must address the growing disparities between rich and poor and between geographical areas, as these are socially divisive and undermine the cohesiveness of families that the state is trying to reassert. Therefore, ways in which the benefits of China's economic miracle can be more fairly distributed across the whole country is a fundamental research focus which might help families and intergenerational relations. Could there, for example, be greater promotion of inland or less developed areas, including development of services and infrastructure, to attract foreign direct investment? If successful, fewer young adults might be obliged to migrate for work or education. This could greatly benefit the nation as well as enhancing intergenerational support among Chinese families.

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