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The Family Care of Chinese Old People :
A Study of the Chinese Communities in London and Hong Kong

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SUMMARY

Title : The Family Care of Chinese Old People : A Study of the Chinese Communities in London and Hong Kong

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This research examines the financial relationships between Chinese older people and their family, the living arrangements of older people, the needs for care and the provision of care in Hong Kong as well as in London. It points out the myth of the traditional Chinese extended family which existed only among the gentry and the elites and the mistake which relates the provision of care to the existence and prevalence of the Chinese extended family. It is argued that westernisation and industrialisation have not washed away the caring capacity of the Chinese family.

The research showed that Chinese old people in the two places maintained an active financial relationship with their children, and the majority still lived with their families, which reflected not so much an absence of alternative but a matter of preference. Help in such aspects as personal care, household maintenance and social survival continued to be provided by the family.

However, the research also showed that a new pattern of relationships between Chinese old people and their children and grandchildren have emerged, and a unique pattern in the division of labour in care within the family has also been developed.

It is argued that the basis of care in the Chinese context has undergone reconstruction. Five interlinked factors are important : the reciprocal contributions of the Chinese old people and the family members; the affective compatibility between the old people and the helpers; the obligatory compatibility between the two parties; and the sanction of normative expectations. All these conditions are subject to the intervention of state policies.

The reconstruction of the basis of care showed that the classical Chinese thesis which suggested that being old must be respected could no longer be upheld. Instead, the state has, through various social policies, shaped and sustain the help seeking and provision of the old people and their families.

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INTRODUCTION

"The root of the Empire is in the State.
The root of the State is in the Family.
The root of the family is in the
individual" (Mencius).

"Filial Piety nowadays means to support
one's own parents. But dogs and horses
are nourished too. If care for parents
is not accompanied by respect, what is
the difference between them and the
animals ?" (Confucian Analects,
"Chinese Classics", I, Part 2).

Background of the Study

Throughout the 20th century China had experienced almost all kinds of turmoil; social, political and economic. I have been told ever since I was young that being a Chinese in this and perhaps the last century had not been an easy task. There was, first, the Nationalist Revolution which ended the Ch'ing Empire. The keen wish of establishing a Republic of China, however, turned out to be a great despair -- there was a prolonged civil war which took place from the early 1920's towards the end of the 1940's, where in between there was the Japanese invasion. The establishment of the People's Republic of China in 1949 did not end the tragedy of the country. Chinese people continued to immigrate to the overseas countries including Britain. Ironically, millions of Chinese people have exiled to, and later settled in Hong Kong since 1949, a colony which was conceded to

Britain as a result of the Opium War. This was the beginning of the story.

Being a Chinese in the past hundred years was not easy. But being old as a Chinese today may be equally difficult. Despite the fact that material life in Hong Kong nowadays has improved enormously, growing old in this place has not been less controversial. To some people at some times, being old is a symbol of status which implies dignity and respect; but to the majority at most of the time, it is fused with inferiority and loss. This controversy is also true, as far as the family care of the Chinese old people is concerned.

On one side of the controversy, informal care for elderly people by the Chinese families was assumed to be active. The assumption was mainly built on 2 grounds: one was that the traditional Chinese extended families had all along been an intact system; the other was that the traditional filial expectations and practices are still prevalent among Chinese communities today. These two assumptions are interconnected.

On one hand, the extended family was believed to be the common and popular form of family structure in traditional China. Having a large and extended family was traditionally regarded to be the biggest blessing in life. Briefly speaking, the emergence and development of the traditional Chinese extended

family had a close relationship with the social context of an agrarian society. The family then was a unit of economic production which depended on the concentration of manpower. It was also a unit of socialisation, social control and care. At that time, each extended family was functional as basically a self-contained unit within which problems of family members were to be resolved (or tolerated), needs to be satisfied (or sacrificed), and the incapacitated to be taken care of. To seek help outside the family would symbolise a failure of the family unit and so became something which were to be prevented and avoided. Within this family network, the elderly people were still being respected. They were the authority of the family, because they possessed the knowledge and expertise accumulated from the life experiences which were essential for an agrarian mode of production. Although the old people were retired at home, their involvement in economic production had not been withdrawn. Instead, their status had only been promoted to be more senior - from a labour to a 'manager' and 'consultant'. In a senior position in the family, they could have the authority to mobilise resources of the family in case of need.

On the other hand, the maintenance of the traditional extended family was backed up by a strong set of normative values established mainly according to the Confucian teachings. Related to the fact that the family was a unit of economic production, the Confucian ideology had conferred sophisticated relationships in

the family as well as outside the family. The most recognised code of ethic was concerned with the order of relationships between parents and offsprings (age) as well as between husbands and wives (sex). In the former order of relationships, the younger generation had been asked to respect and be submissive to the older generation in whatever circumstances. The best evidence of showing respect and submissiveness was considered to be the practice of filial piety. There were elaborated explanations of filial practice, but the main requirement was to put the interests of the elderly in front of the young and to take care of them, financially as well as tangibly. It is for this reason that some people believe that Chinese family today is still intact and its caring function effective, as it is assumed that the traditional practice and the normative sanctions are still operative.

The assumption of the activity of the Chinese family is unequivocally reflected in various policy papers in Hong Kong, the most recent one being the Draft White Paper entitled "Social Welfare Into the 1990's and Beyond" which was published in September, 1990. It wrote :

"The family unit is a vital component of society. It provides an intimate environment in which physical care, mutual support and emotional security are normally available to foster the development of children into healthy and responsible members of society. The family is a source of support and

strength in the care of the infirm and the elderly as well as the delinquent and the handicapped for whom family involvement generally contributes to a more successful rehabilitation. In Hong Kong, high values continue to be attached to the family unit to an extent which cannot be matched by any other institution." (The Working Party on Social Welfare Policies and Services, 1990, p.15)

The Hong Kong Government's mentality concerning the effective function of the family has all along been consistent. In the 1977 Green Paper on the development of services for the old people in Hong Kong, the Government stated openly that :

"Chinese society has a traditional healthy respect for old people. The Chinese family remains a tightly built one and a majority of old people are cared for by their families" (Hong Kong Government, 1977, p.1).

Interestingly, this assumption of the caring activity of the Chinese family is not only prevalent in Hong Kong, it is also found to be popular in Britain. In the enquiry of the Home Affairs Committee into the Chinese community in Britain, it implied without much reservation that the traditional form and function of the extended Chinese family was still basic and active in the context of Britain :

"The family, by which is meant the extended family, is the basic unit and the focus of loyalty to a much greater

extent than in British society... Problems are kept within the family as much as possible... To go beyond the Chinese community for assistance has traditionally been regarded as shameful" (Home Affairs Committee, 1985, p. xiii).

In explaining the social and educational background of Chinese immigrants in Britain at the National Association of Multi-Racial Education Conference, the Hong Kong Government Office in Britain portrayed the feature of the Chinese family in a similar light :

"...the family is the central element in Chinese life and [that] traditionally Chinese have been brought up to regard the loyalty they owed to their family as paramount. In Chinese society, the unit is not the individual but the family... The average Chinese thinks first of his primary duty of supporting, strengthening and protecting his family which he sees as a thread reaching into the past through his ancestors and continuing into the future through his decedents (Hong Kong Government Office, 1976, p.5)

However, on the other side of the controversy, there is a belief that the Chinese family has been de-traditionalised, and that the traditional caring function of the Chinese family for the old people has been largely eroded. This view of the Chinese family was based on the Structural-Functionalist theory of family change which was put forward by Parsons. It was argued by Parsons that the functions of social systems in the 'modern'

society were specific rather than differentiated, and the nuclear family was most compatible to the modern industrialised societies such as America (See Goode, 1964; Morgan, 1975; Giddens, 1989; and for a specific application to Hong Kong Chinese family, see Wong, 1975). As Hong Kong has moved from a pre-industrial society to industrialised, the family system has also changed from traditional extended structure to stem and nuclear structure. As a result, it is no longer compatible for the Chinese family to shoulder the caring role for its dependent particularly older members.

Examples were used to support this de-traditionalisation view of the Chinese family. For example, reports of Chinese old people being deserted and abandoned by their close relatives of the family seemed to be increasing (South China Morning Post, 20/9/1988). There were also complaints by the medical social workers who worked in the public hospital in Hong Kong about difficulties they encountered in relation to the discharge of elderly patients, because false addresses were given by the relatives who sent the old people into the hospitals. In addition, the high rate of suicide and abuse among elderly people was also being interpreted as a failure of the family. In a colony-wide research, Chan (1985) showed that almost one out of four old people had suffered from at least one type of abuse by family members. A similar research study in Tuen Mun, a new town in the New Territories, showed that 51 out of 83 (62%) elderly

cases known to the elderly centre for social services had suffered from being abused (Leung, 1989).

All these problems discussed above tend to support the thesis of those who believe that modernisation and industrialisation in Hong Kong has eroded the traditional caring function of the Chinese family; because not only did the family structure and function change alongside industrialisation, but the western values and life styles which majority of the people adopted are 'detrimental' to the 'positive' Asian concept of family (See Wong, 1986; Lee, 1986; Phillips, 1986). According to the same logic, the Chinese family in Britain was under the direct impact of industrialisation and westernisation and was therefore bound to lose its traditional function.

Controversy and assumptions about the caring functions of the Chinese family and the status of Chinese old people have led to misunderstandings about the Chinese population in both societies on one hand, and confusion and ambiguities in service planning for this group of people on the other.

In Britain, the number of studies focused on the social needs of Chinese old people and the caring capacity of the Chinese family has been few, despite the fact that the Chinese constitutes the third largest ethnic minority group in the country (Home Affairs Committee, 1985). In a reading list

provided by the Hong Kong Government Office in London on the Hong Kong Chinese community in Britain, only 3 out of 52 were on the subject of Chinese family, and none was focused on Chinese old people (Hong Kong Government Office, 1985). Although there seemed to have a growing concern about the minority from the NCP (New Commonwealth and Pakistan) in recent years, the Chinese as a voiceless minority group has attracted only little attention (Norman, 1985; Cheetham, 1972, 1982; Chan and Lee, 1989). The voicelessness of the Chinese was often taken to mean that they could solve their problems by themselves. A vicious cycle seemed to have developed as a result. The lack of research on this minority group led to the prolonged misunderstandings and assumptions, and the latter, in return, contributed to the lack of interest in studying this target population.

Under this constraint caused by the lack of first hand research, previous attempts to understand the care of Chinese old people in Britain had to rely on the second hand materials of Hong Kong. However, there are certain shortcomings in doing so. First, although there are a remarkable number of studies conducted in Hong Kong, they are more about service needs and service evaluation than about the caring capacity of the Chinese family. Secondly, in the few studies which focused on family care and old people, the emphasis tends to be placed on the function of the family-as-a-whole, and there is a lack of critical analysis of the division of care within the Chinese

family, its implications, and the social policies by which it was constructed (Chow, 1988; Yeung, 1990; Ngan, 1990). ^{not in Bibliography} Finally, without a direct cross comparison, it is hard to assess the extent to which findings in Hong Kong about family care of the Chinese old people are applicable in Britain.

It is against this background that the present study was conceived. Being one of the first of its type in comparing overseas Chinese and those in their place of origin, this study carries not only an academic value of unveiling some of the myths about the caring capacity of Chinese family for its old people and the long neglected issue of the division of care within Chinese family in both Hong Kong and Britain, it also helps to strengthen the foundation of comparative studies on the care of British and Chinese old people. Furthermore, the outcome of this study will hopefully serve as a measure to facilitate a better understanding of this quiet ethnic minority group in Britain, particularly in view of the fact that some 50 thousands Hong Kong Chinese families (about 220 thousands men and women, which will double the existing number of Chinese people in Britain) are given Right of Abode in Britain before 1997 when Hong Kong will become a Special Administration Region of the People's Republic of China (British Nationality Hong Kong Act, 1990).

Theme of the Present Study

The study aims at answering several important questions. First and overall, it answers the question about the extent to which Chinese old people were taken care of by their families. Specific questions being asked include : What is the present status of Chinese old people in the family ? What kind of help do they received from their family and why ? How different or similar are these when compared with the traditional past ? In answering these questions it helps to clarify the longstanding controversy and myths about the caring capacity of the Chinese family for its old people.

Secondly, the study reveals the issue of division of care within the Chinese family which has long been neglected, and further examines the dynamics behind the construction of caring roles. It contrasts the traditional caring roles of sons and daughter-in-laws with the 'new' emergence of roles, such as grandchildren and daughters, and examines the social, economic and political context within which the role preservation and changes are constructed. Specific questions under examination include : How are caring tasks and responsibilities divided between and among family members ? How is the division similar or different from the traditional Chinese family ? Why are they so divided ? What pattern of care can be established ?

Thirdly, the study examines the social production of family care among Chinese old people and explains the process of the construction of morality in the Chinese society. Specific questions being inquired are : What role does the state play in reinforcing the caring activities of the Chinese family ? How is the morality of the Chinese family in providing care being produced and strengthened ? How is the help seeking behaviour of the Chinese old people being regulated and enforced ?

Throughout the study, the position of the Chinese old people in Britain was the primary focus of analysis. The findings and analysis of the British study were cross checked and examined with the Hong Kong materials in a comparative frame, in which similarities and differences were identified and explained.

As far as the organisation of the thesis is concerned, the first three chapters set the theoretical context of the whole thesis. The first three chapters critically examine the topic of Chinese familism respectively in traditional China, Hong Kong and in Britain. It aims at correcting some of the myths towards Chinese family in traditional as well as in present time, and it also establishes a framework in which the status and the care of old people as well as the division of care in the Chinese family can be compared. Chapter four gives a theoretical discussion of the meaning and scope of informal care, in which family care constitute the central component. It is argued that care has a

structural as well as a functional component, and its scope is associated with the 'wellness' of the person being taken care of. In the Chinese context, it includes such activities as nourishment (financial support), provision or arrangement of accommodation, personal tending, household maintenance, and social survival. It is within this framework that the care of Chinese old people by their family was studied. Chapters five to eight are the main analysis chapters. Since the traditional concept and content of family care of Chinese old people were closely evolved around the important aspect of nourishment (financial support) and it was one of the most important symbols of filial piety, chapter five analyses the present features and the dynamics of financial support of Chinese old people in the two places. Chapter six gives an analysis of the changes and preservation of caring responsibility in accommodating old people. From looking at who provide assistance in nourishment and accommodation the changing roles of care are analysed. Chapter seven gives an in-depth analysis of the provision of assistance in personal care, household maintenance, and social survival. It not only answers the question about the extent to which Chinese old people were being helped in these daily items, but it further analyses the division of care and develops a pattern of the division of caring responsibility in the Chinese context. Chapter eight deals with the social production of care. It analyses the social process by which the individual as well as the family morality in help seeking and help provision

are reinforced, strengthened and reproduced. The final part of the thesis is the conclusion which synchronises the analysis and summarises the arguments that run consistently throughout the whole thesis.

General Profile of the Elderly Respondents in London and Hong Kong

The research was based on a small sample study carried out in London and Hong Kong. While the details of the research instrumentation are presented in Appendix B of this thesis, a general profile of the elderly respondents is described below so as to give the readers a clear context on which the findings and analyses in the following chapters were based.

Among the total number of 46 Chinese elderly people interviewed in London, 14 (30%) were men and 32 (70%) were women. The majority of them (61% n=28) were widowed, while 35% were married and with their spouse at the time of the interviews, and a small minority (n=2) remained single. Concerning their age distribution, 23 out of 46 (50%) were above 75 years old, and the majority (85% n=39) were above 70 years old.

Five elderly respondents interviewed in London either had no children or their children were not living in Britain, while the majority (89%) had children around in London or in other parts of the country. On average, each elderly respondent in London had

about 2 sons, 1 daughter, and 4 grandchildren. The majority of their adult children (84% n=101) were married, while 16% (n=19) were either single or divorced.

In Hong Kong, among the 41 elderly people successfully interviewed, 12 (29%) were men and 29 (71%) were women. Just above half of the total respondents in Hong Kong (53% n=22) were married and with their spouse around, while 35% (n=15) were widowed and 10% (n=4) either remained single or were divorced. Concerning the age distribution of the respondents in Hong Kong, 24 of them (59%) were above the age of 75 years old, and the majority (83% n=34) aged above 70 years old.

CHAPTER ONE

TRADITIONAL CHINESE FAMILISM : THE CONTEXT OF CARE OF OLD PEOPLE

This chapter examines the structural as well as the ethical dimension of traditional Chinese familism which has important implications for the understanding of informal care of Chinese old people nowadays. The areas to be examined will include the family structure and family loyalty, the prevalence of patriarchy, and the dominance of the age hierarchy. All these areas will be discussed in relation to the care of old people and the offering of caring activities in the family.

Traditional Family and the Myth of the Extended Network

The traditional Chinese family has commonly been regarded to be large and extended where usually several generations were living under the same roof sharing the same family purse. This large and extended family structure has been portrayed as a typical practice of Chinese families throughout the whole country's history. It was commonly believed that families, regardless of their class background, shared this kind of familial practice, in which economic production took place and the old people being taken care of. Under this ideal condition, the family remained an intact unit while members' interaction

within which were largely governed by the cardinal virtues preached by the Confucian ethics and reinforced by social as well as moral sanctions.

Although many people believe that the traditional Chinese family still prevails, nevertheless, family sociologists have increasingly discovered that what has been labeled as traditional Chinese family is more of an ideal type than of a reality (Olga Lang, 1968; Maurice Freedman, 1970; Hugh Baker, 1979; Kay A. Johnson, 1983). Johnson (1983), in her examination of the status of women in the traditional Chinese family, argues that "... the closest living model for the traditional family, with its Confucian norms and highly differentiated status hierarchy, was the large, extended multi-generational family (only) of the landed gentry".

In contrast to the conditions of the gentry and the elites, the families of the less prosperous peasants, who formed the majority of the population tended to be small and rather simple in structure. Parish and Whyte (1978) studied the household structure of Chinese villages and concluded that the rich families might be able, occasionally, to attain the ideal of a large extended family with several sons and their kin living together. But for the ordinary family whose livelihood depended almost solely on the land rented from the rich gentry and their own labour, it would be far beyond their means to maintain a

large family of several generations. By contrast, they had to keep their family small for simple economic reasons. As pointed out by Parish and Whyte :

"In traditional China, all married sons ideally lived under the same roof with the parents, in a patrilocal joint family structure ... The poor (had to) delayed their marriage while waiting for the elder generation to die or for economic fortunes to improve" (Parish & Whyte, 1978, p.132).

Echoing with this view, Baker argued that "in any event, the joint family is very much a phenomenon of the wealthy, (while) poor families being unable to expand in this way" (Baker, 1977).

Needless to say, to maintain a large and extended family where several sons and generations lived together under the same roof was not purely a normative or moral issue, but rather more obviously an issue of political economy. For in an agrarian society, food production was at the heart of all economic activities encouraged by the Empire State. Since land was controlled by the rich landed gentry, the family of the ordinary peasant had inevitably to adapt themselves to the dominant mode of production in order to survive. Although family was still a basic unit of production, the inability of the peasant class to be landowners had significantly restricted the establishment of the "traditional ideal" of the large families. As pointed out by Teuber (1970, p.73), on a scale measured by wealth, family size

increases with the expansion of land holdings. The reason for this is simple. The rich gentry owned enough land to allow married sons to live together under one roof and work towards the collective benefit of the whole family, but in other cases the less prosperous peasants and barbarians had only enough land for one son to stay, while the others had to leave home and seek work as hired labourers or as apprentices in some trade (Taeuber, 1970).

In the light of the above discussion, one can argue that the traditional Chinese family structure and family size was a function of the mode of economic production. The extended family was only prevalent among the wealthy class, a product of class differentiation, while the majority of the population maintained small families. In other words, the extended family had never been dominant in Chinese history : all along it co-existed with a majority of the families which were nuclear and small.

Hsu evidenced this argument in his research on family size of China and concluded that the large, extended family is a mythic concept because it was never typical (Hsu, 1943). Based on the research findings of Tauber (1970) where 60% of all peasant families were classified as nuclear, Stover and Stover (1976) suggested that it would be safe to conclude that the majority of traditional Chinese families were either nuclear or stem. Baker (1977) came to a similar conclusion and suggested that the normal

pattern of Chinese family development involved either the setting up of a separate residence and separate economy by each married couple with or without unmarried children (the conjugal family), or the setting up of a separate residence and economy by each married son other than one who lived with his parents (the stem family).

Although it appears quite obvious that the traditional large and extended Chinese family system was only a familial practice of the ruling elites, yet, certain common structural and normative ideals of kinship and family can still be found throughout Chinese society. This can be understood as a process whereby the ideal family, whether structural or ethical, was reproduced by the ruling elites. Even where traditional practice of the peasant class diverged from that of the elites, the latter who were much more powerful, often provided ideals motivating or helping to explain behaviour where attainment of the ideal was conspicuously absent. This helps to explain why the ethical foundation of social order in Chinese society, which was built mainly upon the Confucian teachings, was so effectively reproduced even among the majority in the peasantry class.

The discussion of traditional Chinese family structure has important bearings on our understanding of informal care of Chinese old people. If care of the dependent members, including the old and the sick, was an unfailing traditional function of

the Chinese family, its production and operation had very little correlation with the existence of the extended family system. In other words, the basis of care within the traditional Chinese family had very little to do with the size of the family networks. Therefore, the common held understanding of the Chinese family and its relationship to the production of care needs to be revised. What is needed is to extend this analysis beyond the structure and size of the family so as to explore the constituent factors of informal care in Chinese society.

The ethical Basis of the Chinese Family and the Construction of Caring Relationships

As pointed out by Chai and Chai (1962), one of the outstanding features of Chinese civilisation has been its emphasis on social relations, and the main objective of Chinese philosophy has been to achieve and maintain an orderly society. The concept of order can in turn be understood to be the cornerstone of a prosperous and harmonious society. Confucius, the philosopher of the social structure who provided the ethical basis for the Chinese family system, established the ideal human relationship by advocating for a rectification of names :

"Let the ruler be ruler, the minister minister, the father father, and the son son" (Analects, XII, 11)

According to the Confucian teachings, it is only through the

rectification of names, by which proper people are put in proper places performing proper duties that an orderly society could be established. Guiding the rectification of names, according to the Confucius, was the cardinal relationships, which included governmental, parental, conjugal, fraternal and that of friendship (Chai & Chai, 1962). According to these cardinal guiding principles, for example, the Monarch was to guide the subject; the father was to guide the son, and the husband was to guide the wife (China Construct, 1975). It needs to be noted that this pattern of relationship which formed the basis of social order in Chinese society was not one which aimed at promoting equality as an end result. Rather it implied and possibly constructed sets of superior and subordinate relationship. For instance, the emperor-citizen relationship was, in material and political terms, an absolutely unequal one, for the commands of the governors were to be obeyed without any question or challenge, and this absolute subservience was regarded as one of the most important virtues which was to be praised socially as loyalty.

In the context of the family, the absolute authority of the Monarch was somehow extended and perpetuated, but was expressed in a form that appeared to be less militant and coercive. Fan (1960, p.20) has pointed out the political implication of the practice of patriarchy in Chinese society :

"The patriarch was made an absolute ruler in the family because the landlord class and feudal rulers wanted to make use of the patriarch to exercise political and economic control over the peasant family, and they thus made the family a political and economic unit"

Although Fan has clearly pointed out the extension of the absolute monarchy into the family, it is still important to note that the central teaching of Filial Piety by Confucius had been used as an effective instrument to reinforce the patriarchic system. As described by Kiang (1982, p.41),

"Filial Piety is estimated as the fundamental human virtue. It has been encouraged and honoured by both the government and society. This virtue is expected not only from sons and daughters, but also from grandchildren, sons-in-law, and daughters-in-law"

As the most important ethical belief and practice in Chinese society, filial piety was one which governed the proper order of human relationship within the family. The essence of this Confucian ethic was two-fold : a practice of complete obedience, submission and devotion and a compliance with the proper order of seniority in the family. A filial practice, accordingly, demanded a son to put the interests of his parents in the first priority before all of his own considerations. He should obey the instructions of his parents when he was young, and should shoulder the responsibility to support them when they

became old. Failure to comply to this filial practice, particularly from sons, would cause the whole family a burden of shame and guilt. Moral and social sanctions would be unavoidable and the unfilial son would have to bear a strong stigma within the circle of the family and clans (Yang, 1972).

In traditional Chinese society which was basically characterised by the patriarchal-patrilineal-patrilocal configuration, it could be expected quite naturally that sons were particularly required to conform to the practice of filial piety. For the agrarian mode of economic production was so closely related to land and soil where a concentration of male labour was required, that sons were not only regarded as important producers, but also the ones to inherit family properties and to perpetuate the family lineage. There was a common concept with regard to the bearing of sons in the family, which was that "to raise a son was similar to storing wheat for the famine". As pointed out by Parish and Whyte (1978, p.209), the sons had a special role to play in the family as far as the practice of filial piety was concerned :

"The father had the obligation to raise his son and provide him with a wife and some inheritance, and the son in turn was obliged to show marked respect and subservience (filial piety) toward his father, support him in his old age, provide him with male descendants, and worship his spirit after death"

In view of the special status and privilege which sons enjoyed in the context of the family, it would also be important to examine the reciprocal obligations expected of them, particularly in the light of caring and supporting elderly parents and members of the family. This is perhaps why sons in Chinese families had a special but key role to play in supporting old people, and this is still prevalent today in Chinese communities. I shall discuss this point in more detail in the following chapters.

Apart from sons being strictly required to practice filial piety, other members of the family were also required to obey and subserve to the senior members of the family and to support them when they were old. Typical examples could be seen where grandchildren were expected to respect and, be subservient to the grandparents, and daughters-in-law to their mothers-in-law. However, it is notably important that the type of reciprocity which these relationships implied was obviously different from that of the sons and their parents.

As filial piety was a basic ethical virtue governing mainly the relationship between ages and generations, there were other ethical teachings which effectively governed other sets of human relationships, for example, between husband and wife as well as between siblings. Dominated by the concept and practice of proper order in the family, siblings have also to act according to their

respective positions in the family. The basic principle guiding sibling relationship was that of "fraternity", meaning in traditional concept that older brothers were expected to be protective of their younger siblings, and younger brothers in turn were expected to show deference towards the older siblings. Fraternity between siblings was certainly only an ideal. Although like the practice of filial piety it was reinforced by social approval and sanctioned by defiance, a complete practice of fraternity between siblings was only a myth. Underneath the co-operative veneer, there often existed inevitable tensions which arose out of the struggles over shares in family income and over future inheritance (Parish & Whyte, 1978). This kind of tension in relationships not only affected the shares of family properties, but also subtly affected the allocation of family roles and responsibility, particularly in relation to the care of the dependent members of the family.

Apart from the example of sibling tension, tensions which arose out of the relationship between husband and wife as well as between in-laws were also typical examples. Both of these examples are related to the role and status of women in the family, and I shall discuss them in an independent section below. But before that I shall discuss the issue of age hierarchy and the status of old people in traditional Chinese family.

Age Hierarchy and the Status of Old People

Under ideal conditions, the status and authority of family members increased with age. In other words age carried a meaning of seniority which deserved respect from the younger members of the family. There was a common saying about the seniority of age among Chinese circles : "An elderly person was like unto a treasure at home". The value of being old in traditional Chinese society may not only be a function of the patriarchal system, but more fundamentally be related to the basic economic structure of the then society. Lang (1968) observed that China's intensive agriculture required not so much physical strength, but rather required a high degree of thoroughness, care and experience, and these are qualities which increased rather than decreased with age. Indeed, in the agrarian economic structure which required knowledge accumulated from practical experiences in order to handle contingencies which arose mainly out of unexpected and changeable natural conditions, old people inevitably became authoritative due to their accumulation of wisdom. As what was preached forcefully by Mencius who was the most influential figure in Confucian teachings after Confucius :

"... some labour with their minds, and some labour with their strength. Those labour with their minds govern; those who labour with their strength are governed. Those who are governed serve; those who govern are served. This is the principle universally recognised" (Mencius, quoted in Chai & Chai, 1962, p.68).

Needless to say, the landed gentry as well as the educated elites were the groups destined to govern and be served in the old Chinese society. While in the domain of the family, old people represented the ones with skills, knowledge and authority who were to guide and be respected. As a matter of fact, the most senior male member was usually the one who held the family purse, made family decision, and took charge of family ceremonies as well as settled intra- as well as inter-familial disputes. When the old people, particularly the male family heads, retired from actual agricultural work, it did not imply that they had withdrawn from the control of economic production. Rather their status in the family might have been promoted from a labourer to a 'manager' or even a 'consultant'. As long as old men were still exercising a form of control over the means of agricultural production, their seniority in the family would be retained and they would still be the ones who had the authority to mobilise resources of the family in case of needs. Nevertheless, there were still exceptional cases where old family heads did not enjoy the privilege of being old. These were mainly those families who suffered from extreme poverty, or else those senior members who had made very little contribution to the economic production of the whole family (Che, 1979). As described by Lang (1968), the status of the senior members was closely correlated to their contribution to the family enterprise :

"The father's authority in the family often seems to be greatly dependent on

the weight of his work and advice in the family enterprise -- on his contribution to the family income".

Except in unusual circumstances, it would be reasonable to conclude that old people enjoyed a respected position within the family, held certain level of authority, and were served when needs arose. This is particularly true with regard to the status of old men within the family. Although it is still true to a certain extent that old women were also to be respected due to their seniority and age, they were apparently less powerful as far as control of family resources and decision making were concerned. In usual circumstances when the male family head was absent, for example due to his death, it was normatively accepted that the eldest son in the family was the one to replace him as head. The old mother, however, was not the one to inherit authority, although she still held a respected position in the family. Since in most cases women were excluded from the formal economic circle, there were different ways which they used to establish themselves in the context of the family. I shall discuss this in more detail in the subsequent section of this chapter.

To serve the senior members of one's family was treated as an important filial practice. The practice of serving did not necessarily imply that the old people were incapacitated. It was quite common for the grandchildren to serve the elderly

grandparents, and it was even regarded as fidelity for the daughters-in-law to serve the parents-in-law, even in times when they were healthy and well. If serving while the elders were capable was fidelity, then caring when the elders in the family were frail was regarded as of even greater significance. Normatively speaking, caring for the old, was a filial practice expected of the younger members of the family. According to Confucius, the support of old people did not stop at providing financial support or purely nourishment, but rather must be accompanied by warmth and respect (Confucius Analects, I). Although Confucius did not specify the content of support in his literature, yet from the classic novels (e.g. the 'Chia' -- meaning the family by a famous writer of the day named Pa Ch'in) it can be seen that support was expected to include financial, material as well as personal tending.

Certainly, the production of care had always reflected a class difference. In the families of the rich in traditional China, old people were usually taken care of by the maids or female servants. It was because the wealthy families could always afford to employ or to simply buy female servants to do the domestic servicing. But in the less prosperous families which formed the majority, members of the family were required to divide the caring responsibility among themselves. According to the Li Chi -- The Book of Rites -- respectful attitude was demanded of children to all old people, even those who did not

belong to one's own family (Lang, 1968), but the practice of it had to follow a proper order which started from within one's own family. This practice of extending one's concern for the old people starting from one's own family was described as 'graded love,' which was also derived from the Confucian concept of maintaining a proper order of the society. However, this practice of communal concern for old people was of course a far reaching ideal which was beyond the means of the ordinary families, because when labour as well as other resources were so scarce, taking care of members of the others' family might directly mean a reduction of resources of one's own family. This would cause heavy burden particularly for those whose labour and other resources were just barely sufficient for subsistent level of living.

Examined in this light, the contents of the 'graded love' was likely to become 'graded care' which varied from elderly persons of one's own family to members of the others' families. Care of the former would include, as portrayed in the novel of Pa Ch'in, everything from financial support to personal tending, while for the latter on the other hand, it was more likely to be an caring attitude. However, despite the impracticality of extending equal care to the elderly members within and without the family, the ethical teachings behind this ideal did undoubtedly attempt to foster a spirit of respect for old people and to arouse an awareness of a reciprocal duty to the others in

the community, although the reciprocity between isolated old people and other unrelated families might be minimal.

Therefore, to say that there was such an ideal in the traditional Chinese society does not imply that all old people were being taken care of by their respective families. Nonetheless, it was more obvious than ever that as a measure of social control it had become very successful. Because when the family had been constructed as a self-contained unit where needs were to be satisfied and the dependents to be taken care of, the Empire State would then be freed from being demanded to perform the distributive and caring responsibility. Conflict between citizens and the state would be minimized, as the family had been constructed as an intermediate unit to absorb most of the expectations and discontents. To sum up, it is certain that in the ethical atmosphere of traditional China, age was regarded as a symbol of respect by members of the family as well as in the clan. But the actual status and power of old people in the family varied according to their economic background and their economic contribution to the family.

Women's Status and Informal Care

In Chinese society there was a long history sex hierarchy which emphasized on the father-son relationship. This was began after the establishment of the 'law of clan organisation' by Duke

Chou in the early emperor era (around 300 B.C.) and was later elaborated by the Confucius (Che, 1979). Accordingly, sons were indispensable in the family because they were regarded to be the ones who carried on the family line and maintained the honours to the ancestors. In the social context of the traditional society, it was also sons who developed and expanded the family enterprise and let the name of the family be glorified. Therefore, the failure to have sons was taken as a major offense against filial piety, and as a result the family had to endure a considerable level of shame. Yet men were very seldom held responsible for not being able to produce male heirs, it was usually their wives who bore the guilt and the blame. In fact, failure to bear male heir was regarded as a serious misconduct of women which was comparable to the commitment of adultery, and hence, was punishable of repudiation by the husband (Ruey, 1961). Andors (1983, p.12) pointed out the irony whereby women was placed in a subordinate position in the family and yet were assigned the most important task of reproducing family continuity :

"The family was a crucial unit of economic production and socialisation. It was also hierarchal, authoritarian, and patrilineal, embodying a strict sexual and generational division of labour. Ironically, while women were strictly subordinate within the Chinese family, they had the key role of providing for its continuity."

Indeed, women had suffered from serious domination by men in traditional Chinese society. The lineal networks were mainly knitted around the surnames of men where there was no place for women. This can be illustrated by the analysis of one of the most important Chinese kinship concept called 'Liu Ch'in', which meant "six kinship relations". These relationships, however, included only those of the paternal side -- relationship between father and son, among brothers, brothers' children, grandchildren as well as brothers' great grandchildren (Johnson, 1983). Johnson (1983) further observed that meaningful kinship relations on the maternal side rarely extended beyond the immediate natal family of a mother or wife, and even these relations were weakened by patrilocal residence, poor communication and a kinship ideology and religion based exclusively on patrilineal lines. As a result, women became only marginal members of the family no matter how hard they worked for its maintenance. As argued by Legendre (1972, p.18),

"The mother is a negligible quantity; she does not count; her power over her child, her son in particular, is very limited. ... (The daughter) will be a slave all her life, with no will of her own, no influence, systematically kept in crass ignorance, neglected to the society of female slaves."

In a subordinate position, women's work and activities were expected to be paralleled by their dependent and low status. As a result, they were inevitably excluded from the men's circle

which was supposed to be more aggressive, productive and thus superior. Women's activities, in contrast, were confined to the domestic realm and their contact with non-family members was to be carefully selected and, to a large extent, limited. Proper women's work mainly involved the nurturing of children, maintenance of the house where the men retired from work and relaxed, and the service and care for its elderly members. Parish and Whyte (1978) gave a very lively description of the women's work in traditional society :

"Women did all the housework such as cooking, washing, tending the children. In the morning before work, at noon, and in the evening from nine to eleven or twelve, the men would be gathered about in groups of three to five just chatting away. The women, meanwhile, were home cooking... No, no one talked about men doing the work in the home. It was just about doing the heavy work in the fields that the women complained."

It was quite clear that the only arena available for women was her home. Trespassing beyond this social acceptable arena would likely to invite social gossip as well as sanction from within the family. The more virtuous a woman was, the more she had to confine her social circle within her own home, and if she was married, within her husband's family.

"we were not allowed, my sister and I, on the street after we were thirteen. People (in P'englai) were that way in

those days. When a family wanted to know more about a girl who had been suggested for a daughter-in-law and asked what kind of a girl she was, the neighbours would answer, 'we don't know. We have never seen her.' And that was praise" (Johnson, 1983, p.14).

As it was commonly stated in traditional society that a woman without talent was virtuous, female members of the family were not only restricted in their social circle and their social exposure, but were very usually deprived from educational opportunities. This was true, of course, of those less prosperous peasant families where there were virtually no resources to support education for daughters, but also in well-to-do gentry class where resources were abundantly available. In general, it was considered inappropriate for daughters to be learned. The qualities required of women to perform their duties properly were obedience, ignorance and indispensably diligence. In a social and ethical atmosphere like that of traditional China, women were very much restrained from participation in the formal significant economic activities. Even in some villages where women in lower peasant families were actually responsible for discharging subsidiary economic activities, such as preparation of agricultural materials, feeding pigs and chickens etc., the compulsory removal from, and the restriction for women to enter into formal economic production had actually suppress the status of women and had also created a state of powerlessness in the family. Johnson (1983, p.16) pinpoints the dependence of

Chinese women :

"More important than participation rates, however, was the fact that women's work generally was dependent on and controlled by men who, through the corporate patrilineal family, monopolized control over the means of production and over the fruits of women's labour. Therefore, even women with high rates of participation in agriculture or in other 'Productive' work were unlikely to be able to translate their labour into significantly greater independence or leverage."

Apart from the analysis that women were excluded from the economic production, Andors (1983) had examined the important Chinese ethics which sanctioned the proper behaviour of women. It was argued that the most influential principles which guided women's conduct were the 'three obediences'. In short, it meant that a girl when young and unmarried was to be obedient to the wishes of her father; when she got married, to her husband; and when she was old or in widowhood, she was to follow the wishes of her sons. In addition, there was the teaching of the 'four virtues' which functioned to reinforce the social manner of women. These demanded propriety in women's behaviour, speech, demeanor as well as in employment (Andors, 1983): In sum, the whole essence of ethical teachings as well as normative expectation towards women was geared towards constructing the passive, submissive and subservient personality which was expected of women.

Although it was generally true that females in the family were subordinated to males, their status did vary according to age and lineage. An unmarried daughter, for example, was only a temporary member in the family whose future rested almost entirely on her marriage. The socialisation of the daughter from early years has directed towards her competent performance as daughter-in-law in her husband's family. Through marriage the daughter would become a member of another family which was perhaps totally new and unfamiliar, and therefore, she had to establish a new set of social relationships.

Even of the less prosperous families the ideal marriage ceremony would involve a process witnessed by his kin and clans, whereby the groom publicly received his bride. This process symbolised the transfer of the girl from one family to another. More importantly, the transfer was not free of charge. The groom's family usually had to pay a 'bride price' to the bride's family, the amount of which varied from rich to poor family, depending on both the socio-economic standing of the bride's as well as the groom's family. The more wealthy the former, the higher the bride price the groom's family had to pay. Johnson (1983) argued that the marriage exchanges between families both reflected and reinforced the bride's subordination within her husband's family. The payment of bride price, which sometimes amounted to the unadorned purchase of a woman, symbolised the transfer of rights to control the woman's body and her labour

from her natal family to her new husband's family. When male families paid dearly for women in marriage, they could be expected to exert great pressure and control to get value from their investment.

Looked at this light, although traditional marriage was still regarded as one of the most important and solemn events in the life of a family, it however carried a sense of commodification of women. Despite the fact that in normal circumstances the bride's family had to reciprocate the bride price with a dowry which was to be sent to the groom's family, it did not function to reduce the sense of women's subordination and commodification. The marriage tradition itself was a double-bind : the more the amount of dowry, the cheaper the bride it symbolised; but the less it paid, the more the groom's family could claim from their 'investment' of the bride price.

Apart from these normal arrangements of marriages, there were some exceptions such as matrilocal marriages as well as the practice of taking 'little foster daughter-in-law' (Wolf, 1975). The former was an exceptional practice where the man became a member of his wife's family through marriage. This kind of practice usually happened in a family where sons were absent and daughters had to be viewed as a link in the family chain. On the other hand, men who were willing to enter into a matrilocal marriage were usually those either without family, land, or

financial resources which, in other words, were those who had no prospect of a proper marriage (Fei and Chang, 1945). According to Johnson (1983), matrilocal marriages were generally viewed as second class arrangements. The man who was willing to enter into such a marriage was likely to be viewed as morally flawed and socially inferior to men who remained filial sons to their own patrilineage. On the other hand, daughters who committed to a matrilocal marriage would not be exempted from social stigma, because inferiority would still adhere to them for the failure to be arranged a normal and proper marriage.

The practice of taking the 'little foster daughter-in-law' was also viewed as a kind of 'minor marriage' which was unusual in normal families. Under this practice a girl was transferred to her future husband's family at a very young age. She was then raised by her in-laws and, after physical maturity, became the wife of her 'foster brother'. Although in-laws bore the expense of raising their own daughter-in-law, they gained early control over her labour and avoided the greater ceremonial and bride price expenses of a normal proper marriage. For the girls who were adopted as 'little foster daughter-in-law', lives in the 'foster home' could be extremely difficult and bitter. Wolf described how they were sometimes viewed as little more than family slaves, and were very frequently denied the affectionate relationship which a natural daughter could expect with her own family (Wolf, 1970). In sum, female subordination did not stop

in marriage, but was further aggravated by this financial arrangements of the marriage contract. The legitimate circle of women and the domestic sphere to which they were confined had not been expanded as a result of the marriage, but were rather being more forcefully strengthened and reinforced. In the following paragraphs, I shall look at the roles and lives of daughter-in-law in the traditional Chinese family, particularly in relation to their caring responsibility.

Daughters-in-law and Reciprocity of Care

Traditionally speaking, the daughter-in-law was the most unfortunate figure in the Chinese family. Being 'sold' into a family which was totally unfamiliar, what she could gain was only a marginal position in the new family. She was given very little power in making family decision or allocating family resources, but was required to devote her complete labour in handling domestic work as well as taking care of the senior and elderly members. This can be explained as a kind of return of reciprocity to the husband's family for the bride price they paid for the marriage. Kiang (1982) observed that a son-in-law might perform only one half of the duties of a son, but a daughter-in-law must do twice as much as a daughter. This logic was not difficult to understand. For the prospect of the daughter rested on her marriage, and her destiny was tied not with her own family but the one of her husband. Although the

daughter-in-law did not have a blood tie with her husband's family, yet the social sanctions and obligations tied up with the marriage determined her fate to be the main housekeeper and carer who was to be under the direct supervision of her mother-in-law. Struggling for recognition and acceptance from her husband's family, she had to serve him and, more importantly his parents, very diligently. To what extent this requirement was fulfilled by the daughter-in-law was subject to individual variation, but it was generally true that the caring responsibility burdened daughters-in-law was at least as much as daughters.

As far as caring for old people in the family was concerned, daughters-in-law were required to assume primary responsibility for her husband's family. Contact with her own natal family was not unusual, but it had to be very carefully arranged. Excessive contacts with the natal family, even in crisis situations, would likely be considered as a negligence of the interests of the husband's family, and could possibly result in family and social sanctions.

The social consequence of this caring arrangement within a patrilocal marriage would be a redistribution of caring duties among the female members in the family. In the presence of an unmarried daughter, the daughter-in-law would have to share some of the major caring as well as daily home maintenance tasks. But in cases where all daughters were married, the major

responsibility would be loaded without exception onto the daughter-in-law. However, how tasks were divided among the sisters as well as the in-laws and what criteria governed their distribution were questions yet unanswered and had to be explored. Yet in considering the patrilocal residence and the restrictions imposed upon married daughters, the distribution sequence would only likely be unmarried daughters who paralleled with daughter-in-law, then followed by married daughters and grandchildren. But in all known cases, sons maintained an intimate position while their duties in caring would remain special and peculiar.

The turning point for the daughter-in-law in her patrilocal family was when she gave birth to a male heir. This phenomenon had at least two significant meanings : first, by giving birth to a son, she had fulfilled the most important expectation of the husband's family and thus be able to be accountable to her in-laws as well as her natal parents. The bride price as an investment could at last generate interest, if not a complete return. For it was the reproduction of male heir that enabled the continuation of the family name, without which the family would feel shameful to face the ancestors in their annual familial ceremonies. The delivery of a son would immediately raise the status of the daughter-in-law in the family, despite the fact that her caring load might have to increase because of the child rearing tasks.

The second meaning for a daughter-in-law in giving birth to a male heir was the development of a uterine family (Wolf, 1975 and Johnson, 1983). According to Johnson (1983), a woman's uterine family existed within her husband's family but was centred around herself as mother and was based primarily on her affective relationship with her children. When the daughter-in-law became the mother, she started to build up a close, intimate and affectionate relationship with her son(s). Unlike the case where her relationship with parents-in-law was formal and cautious, her relationship with sons in her uterine family was very much informal and unrecognised. It was, nevertheless, through this informal relationship with sons that the mother gained her indirect influence within the family, and much more importantly gained her long term security through the long term loyalty of the son. The mother-son relationship in the Chinese family was one of the most important relationships insofar as the care and support of the old mother was concerned. The lasting affective tie between mother and son was mainly constructed through socialisation in the uterine family :

"In socialising her son, a mother was likely to stress the importance of one of the central patriarchal values of traditional Chinese culture --filial piety -- although with a twist. While the classics and men would interpret filial piety as the obligation of a man to place the honor and interests of the patrilineal ancestors and the patriarch above all else, a mother was likely to emphasize to her young son that filial

piety involved a man's life-long personal loyalty to the self sacrificing mother who gave him life and nurtured him" (Johnson, 1983, p.19).

The mother-son relationship as seen in the uterine family exemplified a lasting reciprocity between the two generations. The son had seen the labour of the mother on behalf of himself as well as the whole family, for which he owed reciprocity and affection. The feeling of indebtedness on the side of the son would likely strengthen his sense of commitment in taking care of the mother when she became old. This could be described as a revised version of filial piety, because the official norms demanded filial practice mainly along the patrilineal line. But obviously, the intensity of the affective relationship between father-son and mother-son would be different, despite the fact that there were always ideological and normative expectations to govern and sanction the reciprocal roles and practices of the father son relationships.

The existence of the uterine family sheds light on the understanding on the long lasting relationship between mother and son in a patrilocal family. On the other hand, it helps to explain how the woman managed to gain power and status from a patrilocal family in which she was originally only a marginal member.

Relationship between In-laws

As the daughter-in-law in the patrilocal family gave birth to a male heir, her status in the family gradually changed to become one of the core members of the family. As a female, she was still subordinate to the authority of the husband and the father-in-law, while as a relatively more junior member she had to be humble in front of the elders and to obey their instruction. However, the mother would no longer be only a marginal member. By means of developing the uterine family the mother began gradually to exert influence directly through her son, or indirectly through the discussion of issues related to them. One of the most apparent consequences arising out of this gradual redistribution of power and status within the family was inevitably the tension in the relationship between the daughter- and the mother-in-law, one which was portrayed as most problem-prone within the family :

"...this relationship is the one most often described in the literature as subject to exploitation and conflict, and in any case of dispute the husband was expected to side with his parents rather than his wife, and to demand the latter the submission to familial authority" (Parish & Whyte, p.210).

Indeed, the demand on the daughter-in-law to serve the husband's family was strict and exploitative. The 'Young Wife's Guide' quoted below gave the best evidence :

"The new bride's world consists of her father-in-law, her mother-in-law, and her husband and no others; she must satisfy their wishes and not cross them in the slightest...Before her father- and mother-in-law arise, the bride must first wash and comb herself quickly and without dallying so that as soon as her in-laws awake she may go to ask their health and wish them well. She must go to make the three meals each day herself and at the time of serving food, stand to one side and assist those who are eating...In the evening if the master is at home, even if she receives permission to retire early to her room, she must quietly do her woman's work and may not go to sleep too early. If the master is not at home, she must wait until her mother-in-law retires and then set things in order to go to her room" (Fan, 1960, p.24).

The complete compliance of the daughter-in-law to this guide was only a matter of ideal, although it might be widely expected among many families, particularly among those which were wealthy and prosperous (Legendre, 1972). Failure to comply might be a result of different factors such as the practice of minor marriage (e.g. matrilocal marriages) and the prosperous status of the daughter-in-law's natal family. But in normal circumstances failure to comply was attributable to the rising status of the daughter-in-law in relation to that of the husband's mother. In spite of the fact that the daughter-in-law had very limited resources to reciprocate for the marriage, giving birth to male heirs could be viewed as one, if not the most, significant and valuable return. So as the mother of a son who was so precious to the patrilineal family, the daughter-in-law might not need to

be as submissive as before. She could have an increasing level of participation in the decision making of the family from which she was excluded before. Although the decision making in which she participated was only about issues considered as peripheral, such as child rearing or home management, yet she was advancing a step towards breaching the mother-in-law's monopoly, in spite of the impossibility of replacing her. This was the area which was most likely to arouse tension. Nevertheless, in a fundamentally patriarchal-patrilineal-patrilocal family system, the tension between the in-laws would only be subtle. Open conflict would be rare. The reason for this was two-fold. First, it would be very unlikely for the husband to back up his wife in any in-law conflict due to the demand he faced in practising filial piety and the relationship he had established with his mother in the uterine family. Secondly, the good name of the daughter-in-law's natal family would also be harmed if she was expelled by the family due to the conflict, though this would only be very exceptional.

This is why in-law relationships have become an important topic for the study of informal care among Chinese old people. I shall discuss this area in depth in chapter 7 again with special reference to the division of care among Chinese families in London and Hong Kong.

To conclude this chapter, there are certain myths with

regard to the structure as well as the caring capacity of the Chinese family. I have attempted to argue that traditional Chinese family was basically a patriarchal-patrilineal-patrilocal system. It was constructed by the agrarian mode of economic production, which in turn was used to support its reproduction. Within this system, a structure of power and authority in the family and the clans were established according to gender and age, whereby the former stood as the first priority. The major means of economic production were monopolised by men and women only participated in subsidiary roles as well as the home economy, which were regarded as having only marginal importance. Elderly members of the family, particularly of the prosperous ones, received a respected status at home. Sons were bound by normative expectations such as ancestor worship and filial piety to be responsible for the well-being of their parents when they were old. The pressure on sons was increased and also strengthened forcefully by the practice of sharing the ancestor's heritage, where daughters were, by common practice, excluded. Daughters were viewed as less important and their only prospect was to become an ideal daughter-in-law and, if they were fortunate enough, good mothers. Daughters' connection with their natal family after their marriage had to be pursued cautiously. Excessive contact would be viewed as negligence of the interests of the husband's family and could easily invite criticisms and social sanction.

Married daughters as carers for their natal families were restricted to certain extent by this social expectation. Despite the fact that women were, strictly, still the ones required to perform domestic as well as caring duties in the family, it was much more common in the traditional Chinese family to see daughters-in-law performing this role than daughters. Nevertheless, when daughters-in-law became mothers of their sons, a redistribution of familial roles and status would occur whereby the new mothers would very likely face tension in their relationships with their in-laws. They would still be regarded as the primary carer for her offspring as well as the elderly members, but the nature of reciprocity between in-laws had to be very carefully negotiated, albeit indirectly. On the other hand, through the development of the uterine family, the mother might manage to develop a special and lasting reciprocal relationship with the sons who, in a modified form of filial piety, were socialised to reciprocate when she was old, the care he had received as a child. This is why the caring role of sons in contemporary Chinese society has to receive special attention.

In the next chapter, I shall discuss the situation of old people in contemporary Chinese communities. I shall highlight the continuities as well as changes which have taken place in Chinese families in contemporary China, Hong Kong and London, and shall discuss how these are likely to affect informal care in contemporary Chinese communities.

CHAPTER TWO

ELDERLY PEOPLE AND MODERN CHINESE FAMILISM

In this chapter, discussion focusses on the topic of Chinese familism as seen in the community of Hong Kong. I shall also discuss how this Chinese familism affect the experience of being old in the context of Hong Kong. The discussion aims at pointing out, on one hand, the explicit change of the patriarchal-patrilocal-patrilineal configuration of the traditional Chinese familism, and the subtle reproduction of the Chinese family ethos on the other. I shall begin by giving an analytical account of the political economy of ageing in Hong Kong.

The Political Economy of Ageing in Hong Kong

Hong Kong has developed into a major trading centre in the international market over the last 40 years. What is commonly known about Hong Kong nowadays is largely its so-called miraculous economic growth. Indeed, the economy in Hong Kong has enjoyed continuous growth in the past years despite the fact that it lacks any natural resources. What has been a source of pride among the people as well as the government in Hong Kong is that people in general seem to be benefiting from the growth of the economy. Wages have been rising steadily and is sufficiently able to offset the rate of inflation, which was at about 7.5

percent in 1988. The Gross Domestic Product per capita reached a ceiling of US\$8,500, representing a 7.4 percent growth over the previous year (Hong Kong Government, 1988).

Despite the prosperous outlook of the local economy, old age is being viewed increasingly as a social problem, and the old people themselves have quietly and gradually become the poorest group in Hong Kong (Tao, 1981 ; Chow, 1986). The problem orientation of ageing - the way people regard being old as a problem - in Hong Kong has been developed from two different but related tracks.

The first track relates to its magnitude. According to Chan (1986), the demographic profile of Hong Kong has changed from a pre-modern to a modern form, characterised a lower fertility rate and a greater longevity. As an immediate result, the proportion of old people in the society has grown rather significantly. Phillips (1988) recorded that the number of persons aged 60 and over had barely changed from the 4 percent level in the 1920s. But the change between the 1961 and 1971 brought the relatively rapid growth of the elderly population to public attention. The 1961 Census showed that there were 170,000 elderly people aged 60 and over in that year, representing only 5.4 percent of the total population. In 1971, the number of old people rose to 301,000, which was 7.5% of the population. The number of old people continued to grow in the 1970s and 1980s, and in the year

1986, the proportion of old people aged 60 and over has reached 11.5%, representing more than six hundred thousand people were aged 60 or above (Phillips, 1988; Hong Kong Government, 1961, 1971, 1981, 1986). Between 1961 and 1976, the size of the elderly population increased by 163%, while the overall population only rose by 41% (Tao, 1981). Warnings were frequently given by social services personnel that by the turn of the century the number of old people aged 60 and over will approach nine hundred thousand, and the provision of social services will be a tremendous burden (Hong Kong Council of Social Services, 1986).

So the first factor which leads to the problem orientation of ageing in Hong Kong is the size of the elderly population. The implication behind this thesis is that old people are commonly regarded as non-productive in an economic sense. In a society where economic productivity is accorded supreme importance, old people who are marginalised by the labour market become 'economically non-productive' and are stigmatised as a burden. This stigma is often amplified by their reception of social services, which is being explained as the consumption of 'free lunch'. According to this logic, the larger size of elderly population it is in the society, the heavier burden it will create for the society to shoulder. Failure in the participation in economic production and the consequent financial dependency is therefore viewed as the primary reason for causing the problem orientation of ageing in Hong Kong.

The problem of financial dependency of the elderly in Hong Kong is mainly related to the condition of paid employment and retirement, because for the majority of the population, work is the main source of their income. However, labour participation rate of old people aged 60 and over has always been low. according to the 1976 By-Census, only 1.4% of the elderly population had independent means of support. The 1986 By-Census further showed that only 6.1% of the labour active population was at the age of 60 and over. Although about 27.3% of the old people aged 60 and over were still recorded as economically active, only 10.9% were in gainful employment while the others were engaged in self employment and other take-home economic activities. The earnings of those old people who were still economically active were significantly lower than average, and this was particularly true of the older women who were still working. In the year 1981 and 1986, the median income of the female employees aged 60 and over was only about half (52% and 56%) of the overall median income, while the median income of an elderly man was only 70% of average. Overall, nearly three out of four (74%) of the elderly employees received an income which was lower than the median of the society, which was HK\$2573 at the market price of the year 1986 (Hong Kong Government, 1976, 1986). Tao (1981) in her own research quoted a sample study among elderly people and found that 95% of all working elderly females earned less than HK\$800 per month in 1976, which was slightly lower than the median income in that year (See also Hong Kong Government, 1977). This

shows that old people, especially older women, suffer from inequalities in a patriarchally-organised society which is typical of Hong Kong.

In addition to the fact that old people suffer from low income, those who worked as employees also suffer from long working hours. This disadvantage is particularly obvious among elderly women. According to the 1976 By-Census and the 1986 By-Census, the median hours of work per week of female elderly employees was respectively 54 hours and 47 hours, while the median weekly working hours of the age group between 30-39 was respectively only 47 and 45 (Hong Kong Government, 1976, 1986). Quite obviously, the weekly working hours of the elderly employees compare unfavourably to the younger age group. Old people who need to work in order to maintain their own living are suffering from a double exploitation, that is, they need to work for a longer period of time in order to earn a wage which is much lower than the average income of the majority of the working population.

It is apparent that very few elderly people aged 60 and over in Hong Kong can maintain economic independence through participating in the labour market. Even among those who are economically active, a great majority of them, especially elderly women, earned less than enough to be self sufficient. If engagement in wage employment is an important means of

maintaining individual dignity and independence, then the majority of the old people in Hong Kong are obviously unable to enjoy this status due primarily to their exclusion from or exploitation in the labour market. For those who really need to work to earn a living, the meagre income they received showed that this group of old people are working not because of choice but rather out of necessity (Chow, 1981).

It has not been clearly established how old people in Hong Kong support themselves under the present circumstances, although their deprivation and economic dependency is obvious. To obtain an overall picture we need to explore the division of welfare between the state and the contemporary Chinese family in Hong Kong.

The Division of Responsibility : The Role of State

The division of care between the state and the family in the Chinese society of Hong Kong has been a blurred one. At least this is true as far as financial support is concerned. Unlike in the People's Republic of China (PRC) where the Family Law has stipulated that at least one son in the family has to support their own elderly parents financially (Davis-Friedman, 1979), there is not any legislation in Hong Kong enforcing such a division of financial responsibility. In Hong Kong, a state pension scheme for old people who have reached the retirement age

has not been established. Though a non-contributory pension scheme does exist, it is for the protection of civil servants, who represent only about 7% of the total working population. Apart from this, some contributory provident funds have been set up among the prestigious private companies, but they also only cover a very small minority of the working population. As a result, a great majority of people in Hong Kong enter into their retirement with uncertainty and misery, because in a place where financial protection is non-existent, the loss of income in retirement can automatically mean a loss of means to support oneself and a loss of dignity.

However, to say that there is no state-run central pension scheme in Hong Kong does not imply that the state does not participate in providing any financial assistance for the needy. The state intervenes in the division of responsibility as a crisis manager. Public Assistance, which is a means-tested non-contributory scheme, provides financial support at subsistence level for those who are "the least able to help themselves" (Hong Kong Government, 1979). This residualistic welfare provision precisely reflects the welfare ideology of the ruling elites, and through their ruling machinery penetrates into the ideology of the society (this topic will be elaborated in the final chapter). The rate of the Public Assistance (PA) provision, in 1989, is HK\$630 a month for a single person, representing only one-fifth (21%) of an employee's median monthly gross income.

It is not easy to comprehend how public assistance recipients manage to maintain their living by this amount of money. But what is obvious, is that many of them can only lead a life which is rather substandard. This meagre amount of provision, coupled with the severe attack on one's dignity, leads one to think that the Public Assistance aims to deter rather than to encourage people to seek it as an income protection for their old age. Several studies on the livelihood of old people conducted in some local districts in the colony showed that many respondents avoided applying for PA due to the stigma attached (Tsang, 1987; SOCO, 1989). A sample survey on the needs of elderly people conducted by the University of Hong Kong showed that only 3.2% of the respondents quoted PA as their major source of income (Law, 1984). Although the economic and social deprivation of elderly people in Hong Kong is not a creation of the state pension scheme, yet it has clearly perpetuated the inequalities from which old people suffer.

It is apparent that for old people to depend solely on the provision of the PA is almost impossible. Yet owing to the absence of any alternative many would have no choice but to become a PA recipient. A study of Public Assistance recipients conducted by the Social Welfare Department of the Hong Kong Government showed that that among 57,600 active cases to which payments were made, 42,420 (73.7%) were granted because of old age (Social Welfare Department, 1986). This compares to the

figure for 1976 where 61% of the PA recipients (53,370) were aged of 55 and over, and so it appears that there has been an increasing proportion of old people who received public assistance as part or all of financial support in the previous ten years.

Apart from the state provision of non-contributory public assistance, old people aged 70 and over are entitled to a non-contributory and non-means-tested Old Age Allowance, the amount of which is set at half of the public assistance rate, which is only just over one tenth (12.5%) of the median monthly income of the employed population. Old people at the age of 67 to 69 are also eligible to apply for the Old Age Allowance, subject to an income declaration, which is essentially a modified form of means-test. Setting the allowance at such a low level means that there is no chance for any old people to depend on this amount to maintain independent living in old age. Nevertheless, since this scheme is largely non-means-tested, it is more popular with elderly people. This can be seen in the take-up rate recorded by the Social Welfare Department (Social Welfare Department Annual Reports, 1985, 1986, 1987, 1988). A sample survey conducted in a new town (Tuen Mun) in the New Territories found that 90% of the respondents were receiving Old Age Allowance. Nevertheless, despite the relative popularity of the Old Age Allowance, it is apparent that the allowance itself is not a solution to the financial difficulty of the old people.

In spite of the fact that state financial provisions such as Public Assistance and the Old Age Allowance do not in any sense represent the state's intervention to protect elderly people from economic hardship, to what extent it marked a boundary in the division of financial responsibility between the state and the family is also not clear. This ambiguity is particularly obvious when the old people share residence with their children and are considered members of the family of the son or daughter. Under these circumstances the state considers it has a justifiable reason for rejecting the application of the old people for financial assistance, unless the old people's family declare officially that they are not supporting the old people. The value underlying this policy is obviously a recognition, at least at the part of the state, that the families who live with their elderly relatives have the duty to support them. Whether this value is still recognised by Chinese families nowadays seems to be quite controversial. Even this value is still accepted theoretically among Chinese families, how much it is being practiced is questionable. Before discussing these questions, it is essential for us to discuss familism as seen in the contemporary Chinese society in Hong Kong. Since the great majority of the Chinese families in London were immigrants from Hong Kong in the last 20 years, an examination of Chinese familism of Hong Kong will shed light on Chinese familism and the informal care of old people of the Chinese community in London.

The Structure of Chinese Family in Hong Kong

Unlike what has been pointed out in the previous chapter about the extended family of the gentry class, this type of family form has never appeared to be popular in Hong Kong since the turn of the century, although there was a rather short period in the beginning of this century during which a modified form of "incomplete extended family" did exist (Wong, 1986). The social context precipitating the emergence of this "incomplete extended family" was the political unrest of China and the economic attraction of Hong Kong. As a result, members of related families, such as brothers, cousins etc. migrated to Hong Kong to earn their living while leaving other family members in China. These members of the family settled temporarily in the colony into one family for mutual protection and eventually a family emerged which was extended in structure and composition. However, since these people who migrated to Hong Kong did not intend to settle permanently in the colony, and most of them did return to China when political stability was retained at home, this type of extended family has not become a norm. Moreover, since most of those who migrated to Hong Kong for the reasons mentioned above were mainly men who were relatively young, old people were usually left to be cared for by the other female members of the family who did not migrate. Therefore, one of the characteristics of this type of "incomplete extended family" was the absence of the traditional feature where several generations

of old and young lived together. The situation, however, was likely to be that while one "incomplete extended family" was established in Hong Kong, one "broken extended family" would have been living in the home town in China. Apart from the few Hong Kong settlers, the care of old people and more importantly the practice of filial piety, was mainly a matter of remitting the money earned in Hong Kong back to their old parents in China.

According to Wong (1975, 1986), a more stable type of stem family had emerged as a product of the continuous unrest in China during the 1940s and the 1950s. The civil war against the Ch'ing Emperor; the civil war between the Nationalist and the Communist Party; the war against the Japanese invasion; as well as the turmoil caused by various political movements of the Communist regime, created a major obstacle which discouraged the temporary settlers from China from returning to their homeland. Economic and political conditions of Hong Kong as a free and prospering entrepot on the other hand served to persuade temporary immigrants to become permanent settlers.

As a result of immigrants settling down in Hong Kong, there was a tendency for them to be joined by their family members who remained in China. Parents joining their sons in Hong Kong was a common practice at that time, and this phenomenon was especially popular among those late immigrants who came to the Colony in the 1940s. This was perhaps the main reason why the stem family of a

more stable type was so prevalent at that time. According to Wong (1975) and Yeung (1986), a stem family was characterised by one or both parents living with one of their married son and his family.

Unlike traditional Chinese families which were predominantly patriarchal-patrilineal-patrilocal, Chinese stem families in Hong Kong were less tightly bound by this configuration. Although patrilineality was still the norm which very few people would wish to challenge, patriarchy and patrilocality were practices which were difficult to completely maintain. Despite the fact that most parents lived with their son and the father was recognised as a family head, the almost absolute authority of the patriarch, as seen in the traditional Chinese family, had gradually faded away. This was particularly true in circumstances where the son had taken over the role of the breadwinner, although the title of family head belonged to his father. There were also some signs of neolocality where couples of the younger generation established their own home, and the parents of the husband joined them. In contrast to the temporary nature of the "incomplete extended family", the stem family was relatively more stable and has continued to reproduce itself, while at the same time coexisting with the mainstream of the nuclear family in present Hong Kong.

Compared to the study of the stem family, relatively more

research effort has been spent on the study of the nuclear family in Hong Kong. One of the earliest studies of Hong Kong families conducted by Barnett revealed that 62.9% of the families in the early 1960s were of a nuclear type, while only 12.2% were of a stem type (Barnett, 1961). Thirteen years later, Wong conducted a sample study of 2,270 households in one of the urban areas in Kowloon (Kwun Tong) and the findings showed that about three out of four (73.5%) of the families were of a nuclear type, while one out of four (24%) belonged to stem families (Wong, 1975).

A study conducted in a new town in the New Territories in 1985 showed that slightly more than three out of four (77.6%) of the families were of the nuclear type, while 14.3% were of some kind of extended type. This study confirmed the popularity of the nuclear family. What is new in the findings of this study is the decrease in the proportion of the stem and the extended families on one hand, and the increase in single-parent families due to the growth of divorce and separation rate in the 1980s on the other (Chow, Tang & Chan, 1985). The decreasing trend of the extended family was verified by the 1986 By-Census, which showed that about two out of three families (65%) in Hong Kong were of unextended nuclear type while only 14.1% were of extended type. Among the extended families, the majority (12%) belonged to the category of the stem families, while only a small minority (2.1%) retained any resemblance to traditional Chinese extended families (Hong Kong Government, 1986).

Apart from the decrease of extended families, the Census also showed an increasing number of one person household (12.9%), of which 65,559 (33.7%) were formed by old people aged 60 and over. Together these figures indicate that fewer people in Hong Kong in contemporary times are prepared to form larger households and, that more old people are forming households which are composed only of themselves. These two phenomena are not necessarily causally related, nor does it necessarily indicate that more old people are not living with their children. Rather, about 42% of the old people who formed an one-person household in 1986 were those who had never married, and among the rest, many of them had no living children or had no relative living in Hong Kong. So old people who chose not to live with their relatives in the present context of Hong Kong are still not as common as it is generally believed. Rosen, in her study of siblings' and in-laws' relationships in Hong Kong in the mid-1970s, observed that living with parents became an obligation particularly expected of sons :

"Most notable in our sample is the tendency for shared residence to be a phenomenon of a discrete period of the family life cycle. Especially for sons lower in the birth order, who are not obliged by tradition to support aged parents, living on in the parental home after marriage provides an opportunity for the new couple to save money ... However, as the life cycle progresses and the wealthy and formerly supportive parents become the needy recipients of family assistance, the eldest brothers is then obliged to offer his home to the aging pair" (Rosen, 1978, p.624).

Wong also observed this tendency for old people to share residence with their children (1985), and an earlier study by Ikels (1975) also concluded that a high rate of common residence between elderly parents and their children was prevalent, although there was no hint about the quality of the relationships between parents and children who share residence or the amount of care that the old people are likely to receive.

The Change in Chinese Familism

Farber (1975) in his study of bilateral kinship introduced the concept of factionalism which referred to family politics that legitimise and promote the pursuit of particular and exclusive kin interests. He goes on to suggest that the centripetal family is a form of family which operates in this kind of factional regime. Janet Salaff (1981) gave a detailed elaboration of the centripetal family in her recent study of the working daughters of Hong Kong :

"...In the centripetal form, the family becomes a power base to manipulate other institutions. A centripetal family gathers in its forces by demanding the primary loyalty of its members and mobilising their labour power, political and psychological allegiances on behalf of kinsmen." (Salaff, 1981)

Traditional Chinese familism as discussed in the previous

chapter can be described as a form of centripetal family, if the interpretation of Salaff is adopted. Though adopting a different terminology, Lau in his important research on the Utilitarianistic Familism in Hong Kong, also characterised traditional Chinese familism as one which is "built upon the code of family reputation, with which all family members are to identify with, and its preservation and promotion constitutes the primary duty of all the family members" (Lau, 1978). Accordingly, the primary concern of the traditional Chinese family, which was strongly reinforced by the mode of economic production as well as the normative beliefs, was the promotion and continuation of family interests. A set of reciprocal relationships was then evolved as a result of this type of familism, such as relationship between the old people and the younger generation and between men and women.

How did the traditional Chinese family successfully claim loyalty from its members ? Salaff (1981) pointed out two significant factors, which are respectively the partible inheritance and the practice of ancestor worship. Through the practice of the former expectations and claims were developed between families and family members who expected to share in the estate of their ancestors. The consequence would be a generalised form of reciprocal assistance between families and their members. Through the practice of the latter on the other hand, family loyalty was preserved through the forging and

reinforcing of a family identity.

Salaff argued that Hong Kong society takes a factional form and the Chinese family maintains a centripetal regime which resembles the traditional Chinese familism of the past. Several social phenomena are noted as supportive evidence for this argument. The first is the continuous practice of a family wage economy, which means family members continuously contribute their earnings to the family so as to pool resources together for collective betterment. Hong (1970) also observed a high frequency of joint or co-operative ventures in family investment and property acquisition in research on Chinese families based on Hong Kong. Moreover, there is still a widespread practice of ancestor worship albeit in a modified form, despite the popularity of other religions in the colony (Stoodley, 1967).

Salaff has rightly observed the type of family polity which exists in Chinese communities. However, it would be rather difficult for one to ignore the changes of Chinese familism, particularly in the recent years.

- First, the patriarchal-patrilineal-patrilocal configuration of traditional familism appears to be fading away. Despite the fact that family names still adhere to the patrilineal line, as has been discussed above, patrilocality has been gradually replaced by neolocality.

As regards to the patriarchal tradition which was practiced in the past, changes seem to be more subtle and indirect. With the increasing rate of female participation in the labour force (45% in 1981 and 49% in 1986) (Hong Kong Government, 1981, 1986; Yeung, 1986), females have become significant contributors of family income. The 1986 By Census showed that for an average household size of 3.7, there was an average of 1.8 working population (Hong Kong Government, 1986). The increase of earnings of women in the family has generally led to the belief that their status within the family has improved significantly.

Analysing this, Rosen (1975) suggested that a major change in family authority distribution has occurred. Apart from the fact that seniority in terms of age is being less emphasised, females appear to have more influence in family affairs. Decision making within the family has decreasingly been made by the patriarch alone, but rather by the patriarch (male head) and the other who are mainly working members of the family. In more and more cases the order of decision making has been reversed. Authority has been found to be centred around the younger generations who are very often working members and breadwinners of the family. The old family heads are still being consulted in making family decision, but only as a measure to show filial piety and respect.

The declining status and authority of the old people within

the family is not difficult to understand. In a rapidly industrialising society like Hong Kong the experience of old people has very little to contribute to the efficiency of economic production. The exclusion of old people from the work force as well as the disadvantages they suffer from wage employment, as discussed above, are good evidence of this. Under these circumstances, the title of the family head is no longer equal to the possession of authority as it was in the past.

However, recent studies of the family show that female members of the family have not been able to acquire more authority in the family despite the fact that they have made significant economic contribution. Chiu (1989) studied family life in a new town (Tsing Yi and Kwai Chung) in the New Territories and found that three out of four females (73.5%) in the family are still primary domestic care-takers regardless whether they are employed outside the family. Salaff (1981) also observed the relative powerlessness of daughters as well as wives, although it was suggested that the opportunities for unmarried working daughters have actually expanded. This argument supports the one made earlier by Darwin who argues that woman cannot gain real power in the family until they break the bonds of economic dependence (Darwin, 1976). As a result, though many women are responsible for enlarging family resources, power does not accrue to them, although their influence within the

family has been increased. Besides, the study conducted by Chiu (1989) in the Tsing Yi District found that women in the families still perceive themselves and define their own role as primarily within the family, though some role reorganisation could be seen. On the other hand, Salaff (1981) also observed that the domestic politics of the uterine family arising out of the domination of male over female in the family still exists in the family context of Hong Kong. These findings show that certain aspects of traditional Chinese familism, especially those related to the distribution of power between the two sexes, have continued to be reproduced in contemporary society.

There is another phenomenon in society which indicates the change in traditional Chinese familism. This is the reduced emphasis on the reproduction of male heirs. This can be taken to mean that the concept of lineality has become less important and that loyalty towards the lineal family has been gradually diminishing. This situation is best illustrated by the reduced fertility rate and the popularity in family planning (Yeung, 1986). In the short period from 1971-1981 alone, the birth rate in Hong Kong had dropped considerably from 19.7 to 16.9 per thousand population. This figure continues to drop, and in the year 1988, the birth rate per thousand population was only 13 (Hong Kong Government, 1983, 1989). Fertility rates per woman had also dropped significantly from 3.41 in 1971 to 1.97 in 1981. With the decrease in the birth rate, the fertility rate per woman

is expected to follow the declining trend. The fact that one woman on average gives birth to less than 2 offspring indicates that whether the heir is a son or a daughter is seen to be less important. The tradition that only a male heir could legitimately inherit family property is also diminishing among ordinary families, although it is still upheld by some wealthy people as a normative belief.

This aspect of change in the traditional Chinese familism is again closely associated with the existing political economy. Alongside the replacement of the agrarian mode of economic production by the industrialised and capitalist mode, a great majority in the population own very little property. Land is so scarce in the colony that very few people can afford to own it and to distribute it as inheritance. The preservation of male heirs in order to reproduce family interests and protect property is not as necessary as before. This is perhaps why the manifestation of domination by male over female in the present Chinese society has turned from explicit to subtle. But in any case, women and elderly people remain the ones who are the most disadvantaged.

The change of Chinese familism is a complex issue which cannot be explained simply in a linear direction. Nonetheless, Lau has contributed very significantly to the understanding of modern Chinese familism in Hong Kong. According to him, Chinese

familism in Hong Kong can be characterised as 'utilitarianistic' which is defined as :

"... a normative and behavioural tendency of an individual Chinese to place his familial interest above the interests of society as well as its constituent individuals and groups, and to structure his relationships with other individuals and groups in such a fashion that the furtherance of his familial interests is the primary consideration. Moreover, among the familial interests, materialistic interests takes priority over all other non-materialistic interests" (Lau, 1981, p.978)

Although some changes have taken place in the family, such as the declining status of the patriarch and the reduced absoluteness of patrilineality, the primacy of familial interests still reflects a continuation of the traditional Chinese ethos. Nevertheless, the traditional normative considerations which pulled the family together have been replaced by utilitarianistic considerations. In other words, family solidarity in modern Hong Kong has been achieved largely by the utilitarianistic consideration for economic interdependence among family members. As a result, economic transactions between and among family members are much more frequent and intensive than other familial transactions, such as affective and social. Lau concluded that

"the major goal of the family unit as a collective entity is seen to be the promotion of the economic well-being of

the members individually rather than the attainment of social status for the family as a whole" (Lau, 1978).

The reason that Lau (1979) interpreted the Hong Kong Chinese familism in an exaggerated utilitarianistic perspective is understandable. In such a market oriented society like Hong Kong, human relations have been dominated by the mentality of the market mechanism. Human relationships, under this mentality, are only meaningful if they are judged in terms of market utility. This perspective is perhaps true for understanding human transaction outside the family. But there is insufficient evidence to claim that Chinese familism has been completely intruded on by utilitarian considerations to such an extent that all traditional familism has been eliminated. Such a view would also lead people to overlook how traditional familism has reproduced itself in a more subtle way. The role and status of women within the family is a good example of this subtle reproduction.

Nevertheless, the concept of utilitarian familism has contributed significantly to our understanding that a new set of reciprocal relationships have emerged inside as well as outside the family. The exchange of assistance and mutual aid between lineage families have reduced remarkably due to the diminishing function of utilitarianistic advantage. This is perhaps true as far as social relationships are understood today. But how much it

affects the situation and the care of old people is an important question to explore. I shall, however, deal with this topic in the subsequent chapters.

To sum up the discussions of this chapter, it must be pointed out that one needs to look beyond the changing structure of the Chinese family and pay attention to the reproduction of traditional family ideology and the preservation and changes in the distribution of family roles. Furthermore, how and to what extent has the changing status of Chinese old people affected their position at home and their experience of being old is also an important question to answer. With the prior understanding of the Chinese familism, I shall highlight on the situations of Chinese old people in Britain in the next chapter.

CHAPTER THREE

THE CHINESE FAMILY IN BRITAIN

This is a brief chapter which aims at highlighting the experience of the Chinese old people who live in Britain. The problems faced by this group of people and the disadvantages they encountered will be discussed. To begin the discussion, it needs to be noted that the Chinese in Britain constitute the third largest ethnic minority after those of West Indian origin and those from the Indian Subcontinent. But due to their low profile and their lack of involvement in the British community, their problems and needs have very seldom been heard. There have been very few reports of racial incidents involving the Chinese (Home Affairs Committee, 1985), and research targeted at and related to the Chinese in Britain has also been very limited. The few which have been done so far are mostly by Chinese students from Hong Kong who did them as a part of the requirements of their studies (Hong Kong Government Office, 1985). As a result of a general lack of understanding, Chinese in Britain are usually regarded as having no serious problems, and even if they have, they were impressively capable of 'self-help' (Home Affairs Committee, 1985). This capability of self-help is not only an impression of the British people, but is an image which the Hong Kong Government endeavours to sell :

"We believe in relying on ourselves. When we are in difficulty, we try to sort it out on our own, when it fails we turn first to our immediate family and then to more distant relations or friends." (Hong Kong Government Office, 1976, p.7).

Implicitly, the informal caring networks of the Chinese families were assumed to be still active. Kin, relatives and friends were assumed to be readily available for help when called upon. These assumptions were usually based on the ground that the Chinese have a very low consumption of social services. However, in what way and to what extent informal care among Chinese community in Britain is still active are still questions to be explored. Before any attempt is made to understand informal care among the Chinese community in Britain, it is necessary for us to have some background information about this community.

Population Size

Remarkably little research has been carried out into the Chinese community, and the lack of reliable information extends even to its size and distribution. According to the 1981 census, there were residents in Britain 58,917 persons who were born in Hong Kong and 17,569 persons born in China. Since the census contained no question relating to ethnic origin, the figure quoted above does not cover those Chinese people who were born

in Britain. As a result, any information about the size of the Chinese community has to rely on estimates.

Based on a small sample survey which includes an ethnic question, the Labour Force Survey estimated that the number of people of Chinese ethnic origin in Britain was at 91,000. On this basis, after making some allowance for persons of mixed origin and for some increase since 1981, the Office of Population Census and Survey gave 100,000 as its 'best estimate' of the size of the Chinese community in 1983 (Home Affairs Committee, 1985).

However, the Hong Kong Government Office at London used a different method and has come up with a rather larger estimate of the Chinese population in Britain. The total number of Chinese people in Britain, according to the calculation of the Hong Kong government office, was 126,978 in 1983. Taking into account that a number of people have departed, the size of the Chinese community was estimated to be in the region to 120,000 at 1983 (Hong Kong Government Office, 1983). Based on the formula of the Hong Kong Government Office, and taking into consideration that the immigration rate of the Hong Kong Chinese has reduced significantly in recent years, due both to the increase restriction of immigration policy and the saturation of the Chinese food services industry, it is reasonable to estimate that the total number of Chinese in Britain is in the region of 150,000 in 1987 (See Appendix A).

Age Distribution

For the same reason as stated above, information about the age distribution of Chinese people in Britain has again to rely on estimates. At present, there are about 30,000 Chinese children in British schools, which already constitutes 30% of the Chinese population. According to the Home Affairs Committee's Report, about 3% are aged 65 or above, and there are also 10% between 45 and 65. It is therefore reasonable to estimate that there are about 7,000 (4% of the Chinese population) elderly people of Chinese origin in Britain who are at the age of 65 or above.

Distribution of Location

Information about the distribution of Chinese within Britain is even less precise. According to the Home Affairs Committee's Report (1985), different sources in different areas give different estimates of the local Chinese population. The lack of accurate figures at local level is of much more than academic significance. It may imply that local authorities have no reliable way of estimating the size of the Chinese population they should be attempting to serve. Indeed, some authorities whose Chinese population is very dispersed may scarcely be aware that they have a Chinese population at all. A similar problem exists among the Community Relations Officers who have the

impression that Chinese people form a very closely-knit and exclusive community and partly for this reason, they have often neglected them (Lai, 1975).

However, despite all the differences in the estimates, both the Hong Kong Government Office as well as the Home Affairs Committee come up with an estimate that about 50% of the Chinese emigrants are settled in London (Home Affairs Committee, 1985; Hong Kong Government Office, 1983). The remaining proportion are believed to be concentrated in Manchester, which is at present the second largest, yet ever growing, Chinese community in Britain. Apart from London and Manchester, Liverpool, Birmingham, Glasgow, Edinburgh and Cardiff are the major cities where Chinese people are concentrated.

Among the Chinese who settled in London, the majority of them live and work in Westminster Borough where the London China Town is located. Besides Westminster, Camden is believed to contain the second largest Chinese population in London. The rest of the Chinese emigrants live and work scattered in other parts of London such as Tower Hamlet and Lambeth.

Occupation and Employment

Early Chinese emigrants to Britain were mainly Chinese seamen employed on British ships. This could be traced as far

back as the beginning of the 20th century. As the market for Chinese catering and restaurant industry in Britain boomed in the 1950's and 1960's, more and more emigrants of the New Territories of Hong Kong arrived to join into the development of the growing restaurant business. At present, it is estimated that the catering and restaurant services have absorbed about 90% of the Chinese workforce in Britain (including restaurants and take-aways), where the small remaining proportion are involved in importing and wholesale activities in the support of the Chinese catering trade. The number of Chinese professionals (notably accountants) is growing, but it remains at yet tiny in percentage terms, possibly as little as 2 or 3 percent (Home Affairs Committee, 1985).

Problems Faced by the Chinese Emigrants :
A General Profile

As mentioned earlier, the Chinese community in Britain is an unvoiced group which has made very few demands on social services. But the fact that there is no complaint by no means implies that there is not a need or then they do not face any problems. Rather, in a situation where there is competition for scarce resources, those who fail to make their need known are likely to receive less attention.

Language Barrier

Unofficial estimates of the proportion of first generation Chinese emigrants who are unable to speak English ranged from 65% - 75% (Home affairs Committee, 1985). As a result of language difficulty, most of the Chinese (most of them first generation emigrants) found that they are unable to communicate to their British counterparts in all areas of living. Difficulty with the English language also leads to an ignorance of British law, and prevents them from taking full advantage of their benefits, services and facilities in social, medical and health, educational and other fields provided for all residents in Britain.

Apart from the fact that language barrier has brought about difficulties for those Chinese emigrants at all ages who do not speak English, it results in more restrictions for the elderly people. As a consequence, Chinese old people in Britain become more isolated, housebound and thus more vulnerable. The social services which are often utilised by British elderly people, for example, district nurses, health visitors, and home help are not used by the Chinese elderly because of the fear of communication failure. Meals-on-wheels are also not used because they do not like English food which is provided.

As a consequence, most Chinese elderly people only have a limited mobility -- a limitation not of physical incapacity, but of the ignorance of using public transport. When travelling they very often have to be escorted by relatives or kin, thus creating a lot of manpower and caring implications. Considering that 90% of the Chinese emigrants are engaged in catering services which have a very long working hours (usually from 12 noon - 12 midnight), the isolation and loneliness of Chinese elderly people really deserves further attention. For those old people who work and live within the China Town, they may be able to locate companions due to the availability of Chinese neighbours and friends. But for those who live and work out of the China Town, neighbours who are not of Chinese origin may only comprise a very remote friend.

Prolonged Working Hours

As mentioned above, 90% of the Chinese emigrants are engaged in catering and related trades which have very long and unsociable working hours. It has been pointed out by the Hong Kong Government Office that the shortage of recreational facilities suited to their inclination and, in particular, their hours of work, has left many with few choices other than gambling as a past-time (Hong Kong Government Office, 1985).

However, what is more important in terms of care for the

elderly people is that the availability of carers is much restricted. This is particularly true of those Chinese families which are engaged in Chinese takeaways, for this business is indeed a whole family business. It usually involves the couple and all family members -- usually the husband at the kitchen and the wife taking the orders from customers, or both the husband and the wife working at the kitchen and leaving their children taking orders at the peak time. The role of the elderly people was mostly undefined: some may offer to help out in the business and taking care of miscellaneous affairs, while others may offer to take care of the small children at home.

The restriction of the language barrier and the unavailability of their sons and daughters, means that the social life that the elderly people enjoy is often very limited, except for those who live in China Town.

Conclusion

The Chinese in Britain are commonly seen as being unvocal, quiet and self-sufficient. These qualities, however, are not inherent characteristics of the Chinese people. But rather, they should be regarded as an outcome of coping in a unfamiliar and culturally different society. The language barrier which most of the Chinese people face, and the prolonged hours which they work

put some restrictions on their personal as well as their social lives. Elderly people are perhaps the ones who suffer the most. There are also implications concerning the availability of informal care by kin, relatives or friends, the types of care being given and the availability of carers. These aspects of informal care for the Chinese elderly people in Britain all deserve more attention and examination.

CHAPTER FOUR

THE MEANINGS AND SCOPE OF INFORMAL CARE

The purpose of this chapter is to review in a more critical perspective the relevant literature on the subject of informal care. The ultimate concern in doing so is to establish a conceptual and operational understanding of the subject matter which is relevant for the study of care in the Chinese context. Focal areas under examination include the meaning of care, the concept of informality, the boundary of informal care and the Chinese concept of care.

To begin the examination, it needs to be pointed out that there is a vast diversity in the use of terminology in relation to the subject of informal care. These differences in the use of terminology may refer to the same meaning in some circumstances, but may be different in some others. This diversity presents not so much a problem, but it rather reflects the different social contexts in which care is being viewed and the different caring activities considered to be important and necessary.

In Britain, the term 'informal care' has been used both in academic literature as well as government documents (Abrams, 1977, 1978; Bayley et al., 1984, Allan, 1983; Walker, 1985, 1989; Gilroy, 1982; Graham, 1983; Dalley, 1988; Ungerson, 1987, 1990). Among these discussions, one prominent definition has been given

by professor Abrams:

"...the provision of help, support and protection to others by lay members of societies acting in everyday domestic and occupational setting." (Abrams, 1978, p.125)

However, for Wenger and the others, the term informal care, though not precisely defined, is taken to be somewhat equivalent to 'informal social support' which are provided by 'informal support networks' (Wenger, 1984, pp.18-20; Lee, 1985). This 'support networks' approach to the study of informal care has been rather popular in the United States. One prominent example is a definition given by Cantor (1980). He used the term 'social support system' to refer to

"a pattern of continuous or intermittent ties and interchanges of mutual assistance that plays a significant role in maintaining the psychological, social and physical integrity of the individual overtime" (Cantor, 1980, p.33).

Although the 'social support system' suggested by Cantor did not confine its scope to strictly informal sector, the concept of relationship network of helping clearly deserves some discussion. I would, however, deal with this concept at the later part of this chapter.

Apart from the concept put forward by Cantor, similar terms such as 'social support network' and 'mutual helping' have been used by Whittaker and Garbarino (1983) to refer to people caring about each other and on their natural helping tendency. Furthering the network approach, Hooyman (1983, p.133) used the term 'informal personal network' to refer to "a series of linkages along which information, emotional reassurances, and services flow to and from a person and his or her exchange relationships [which are not formalised]".

In addition to the diversity of terms used under the topic of informal care, there are also some words which are being used in similar background and context, but the scope and meaning of which are, however, undefined. Obvious examples are words like 'assitance', 'help', 'support', 'tending' and 'care'. Although it has been pointed out already that it is difficult to develop a universally applicable definition of informal care, the diversity in the use of terminology has obviously further complicated the issue.

In this light, there is a need to look behind the vast diversity of terminologies in the purpose of developing an operational meaning of care and informality. I would attempt to discuss the two issues separately below.

Caring : Meanings and Implications

Graham (1983) attempted to answer the question of what care is from a feminist perspective :

"[Care] is a concept encompassing that range of human experiences which have to do with feelings concern for, and taking charge of, the well-being of others" (Graham, 1983, p.13).

This definition has successfully identified that identity and activity are two components of care and that caring demands both love and labour (Graham, 1983). Based on this conceptual explanation, Ungerson (1983, p.32) further elaborated the difference between 'caring for' and 'caring about':

"[Caring for] described provision for needs where the sense of obligation on the part of the carer is socially rather than affectively constructed."

In other words, the concept of caring for, according to Ungerson, implies the carrying out of the actual helping activities for someone; while caring about someone may mean to concern about a person or to love someone (Ungerson, 1983, 1990). The definition given by Graham (1983) and the later development made by Ungerson (1990) can be described as a structural definition of care, in which it composes of both the affective as well as the tasks and action components.

Although being successful in giving a structural definition, this perspective does not go further into the scope and nature of caring activities beyond only giving the vague description of 'provision of need'.

Abrams (1978), having given a stimulating theoretical paradigm on formal and informal care, tended also to emphasize more on defining the concept of 'informality' than on the concept of 'care'. In connection to the meaning of care, Abrams (1978, p.125) pointed out that:

"[Caring is] the promission of help, support and protection to others..."

However, the problem with this explanation of care is that help, support and protection, when used unspecifically, could cover a wide range of activities and needs -- from spiritual to financial.

Nevertheless, a broader definition of care may undeniably have its own merits and strengths, as it can flexibly embrace a wider range of activities in different context. But at the same time, it has to be pointed out that in the context of the social policy planning, unless the scope and nature of the activity are clearly identified, discussed and defined, no concrete plan with regard to who cares about what at what costs and with what support could be formulated.

In the light of this logic, Parker (1981, p.17) gives a more concrete explanation of care:

"On the one hand, the word care is used to cover the idea of concern about people... On the other hand, 'Care' also describes the actual work of looking after those who 'temporarily' or 'permanently' cannot do so for themselves."

By 'looking after', Parker (1981) further explained that it included such 'tending' activities as "feeding, washing, lifting, cleaning up for the incontinent, protecting and comforting."

Parker's definition of care, in contrast to the one given by Graham, seems to be more comprehensive, as it consists of both a structural dimension and a quite clearly defined functional dimension. However, if we take this definition one step further, we would discover that 'tending' has actually implied two features : first, the scope of care is mainly surrounding the major day-to-day personal and/or domestic tasks which a person has to handle in order to maintain his/her living; and secondly, the person being cared for is incapable of performing such personal and domestic tasks because of one reason or another. The duration of the incapacity would be temporary or permanent.

This 'tending' view of caring cannot be detached from the social context in which the definition is made. It implies that

the focus of attention is the growing population of the old people who are in different levels suffering from functional incapacities leading possibly to immobility, being home-bound, and may also be incapable of personal care. It is reasonable for a society where there is a considerable proportion of the old people who are in the age of 75+ in the population that the focus of attention in the care for the elderly is put on the 'tending' activities. However, in a society or among a population where the problems facing the elderly people are dissimilar, this 'tending' view of caring may become restricted and narrow, for it may have overlooked the fact that the 'wellness' of the old people, especially of those who are not functionally incapacitated, needs backup help of different kinds. So questions such as what kind of care besides tending does a functionally capable elderly person need from their family and what kind of care other than tending does a functionally incapable person need are obviously valid for the understanding of informal care among Chinese communities in Hong Kong as well as in Britain.

In connection with these questions, Garbarino (1983, p.4) attempted to give a broader definition of care in explaining his 'social support network':

"...a range of interpersonal exchanges that provide an individual with information, emotional reassurance,

physical or maternal assurance, and a sense of the self as an object of concern".

This definition of Garbarino has supplemented the tending view put forward by Parker. Tasks such as giving and sharing opinion in problem solving, and giving support and reassurance are being included as aspects of caring. It is significant to acknowledge that tending forms an integral and essential part of caring, but on top of that, social care (social activities), emotional and psychological encouragement and reassurance are also regarded as important.

The need for a broader but clearly defined explanation of caring activities has been echoed by Whittaker who argues that caring should not be single purpose, but rather it should include:

"the provision of moral and emotional support, physical care and nurturance, information and advice and tangible aid, i.e. food, money, clothing and shelter" (Whittaker, 1983, p.46).

Again, the aspects of social and emotional needs of the elderly people have been included into the meaning of care.

Sharing similar orientation, Frolaud and his colleagues (1981) established a typology of caring activities, which include

care taking - the provision of material assistance or services; friendship - ranged from chatting to offering emotional support; problem solving - giving direct advice or referring; and joint action aiming at long term change at the benefit of the whole community.

The need for a broader view of care was also supported by Bayley and his colleagues in the Dinnington Project where they saw as essential a dual aspect of caring activities which should include not only friendship, warmth, sense of belonging and affection but also the provision of practical and instrumental activities (Seyd, 1985; Bayley, 1985).

Based on the above discussion, two major principles can be delineated in the formulation of a working explanation of care: first, care has a structural dimension as well as a functional dimension. In the structural dimension, it consists of both a feeling of concern, a compassion as well as a labour. In the functional dimension, it denotes a range of activities which enables the person being cared for to prevent from incapacity, maintain his daily functioning and to solve problems.

Secondly, the range of caring activities includes those which link a person with the social environment (friends, neighbours, relatives and the outside world); give emotional support and advice; and help in tending and solving problems.

The Issue of 'Informality' in Informal Care

There have been some controversial discussions about the definitions of 'informal' care, particularly on the relationship between the 'formal' and the 'informal'. The issue could be viewed from a multi-dimensional perspective : first, who are we referring to when we say that care is given by the informal networks? Secondly, how is care being given, particularly if compared with the statutory or professional service? Thirdly, how are these helping activities motivated and sanctioned?

As regards to the question of informal personnel in performing the caring tasks, Abrams (1978) pointed out that those lay carers in informal care are usually family members. It has also be pointed out that female members of the family have most often shouldered the major caring responsibility, (Finch & Groves, 1984) and this division of care is socially constructed and enforced (Walker, 1985). [A detail discussion of the division of care is given in Chapter 6].

On the other hand, Seyd and her colleagues in the Dinnington Project Report defined informal care as :

"the giving of both social and practical support by relatives, friends and neighbours" (Seyd, Bayley, & Tennant, 1984, p.8).

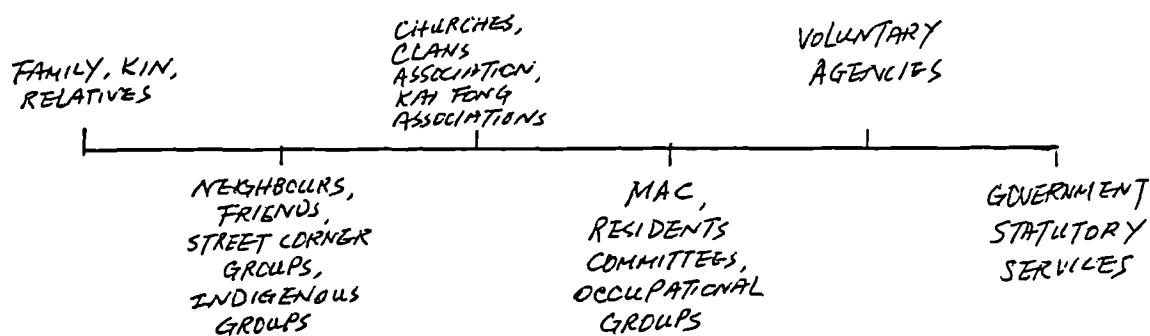
To make clear who they are, the Dinnington Report further pointed out that they "exclude all statutory and voluntary body support and the help given by individual volunteers recruited by the statutory workers." Besides, the sense of locality in these definitions seems to be quite heavily stressed. And informal relationship is viewed to a certain extent to be affective and locality based, building upon the normative expectations and reciprocal exchanges. Although the relationship of mutual helping is based on a perception of reciprocal advantages which is not legally sanctioned (Abrams, 1977), the enforcement of its implementation may be sanctioned by a collectively recognised norm.

Apart from the implication of locality, the above definition also implies an aprofessional as well as non-bureaucratic practice. By aprofessional and non-bureaucratic practice, the meaning does not restrict itself only to the scope of personnel, but refers more explicitly to the way that care is being given. Informal care, in that sense, is a day-to-day activity governed not by professional knowledge and bureaucartic arrangements. It is, however, care provided by friends, relatives, neighbours and other lay members in the community through a perception of need, driven by a trust of reciprocal advantages and a recognition of obligation, and is arranged between the carers and the person being cared for without any formal intervention.

In looking at informal care, it would be difficult to distinctly segregate the care given by the informal carers from those given by the formal service sector, because the two can be constantly interacting. If the relationship between the formal and informal care can be understood in terms of a black and white picture, then we could simply say that those caring activities not provided by the formal sector are informal, or the vice versa. But things are certainly not that simple, and it would be quite impossible to cut a sharp edge between the formal and the informal sector, especially when the caring activities of a society become sophisticated.

In the case of Hong Kong, there are various types of caring activities provided at the local level by different bodies. For example, there are clans associations formed by families of the same origin; there are also Kai-fong Welfare Associations formed in local neighbourhood; and religious bodies running at local level (including Catholic, Christian and Buddhist organisations). On the other hand, there are Mutual Aid committees (MACs) at each block of public housing estates; residents committees at some of the older housing estates and squatter areas. These committees and groups are not organised by traditional and normative ties, but externally by the statutory body or voluntary agencies. Added to this complex scene, there are many publicly funded voluntary agencies as well as some privately funded voluntary agencies operating at the local level which make the scene more

complicated. The picture of informal sector is by no means a black and white picture. Rather, it could be understood in terms of the following continuum :



Although as it was suggested by Bayley (1981) that the edge between the formal and the informal sector is often blurred, it is still attempt to synchronise some distinctive structural features of informal care from the above discussions :

- (1) Informal care is provided by people one may ordinarily be acquainted with : for example, family members, relatives, friends, neighbours, colleagues, church members.
- (2) Informal care is not organised according to bureaucratic rules and routines, rather it is more an inter-personal and day-to-day activity.
- (3) The way that informal care is given is not governed by professional practice -- emphasizing

on knowledge and skills; basing on objective and professional assessment of problems and needs; controlling emotional involvement; standardising performance and systemising evaluation. On the contrary, it is an aprofessional activity -- building on reciprocity, mutuality and affection, stressing identification, basing on experience and common sense.

(4) Motivation of informal care is based on mutuality, reciprocity, affection, religious and mormative belief and duty.

(5) The sanction and reward of mutuality, reciprocity and exchange are, although not legally enforced, are nevertheless collectively recognised and are supported by a set of norm and trust.

In connection with the above discussion on the meaning of informal care, several issues have to be further clarified and discussed. The first among which is on the myth and reality of the informal caring networks.

The Informal Caring Networks for the Elderly : Myth or Reality ?

One way of looking at informal care is to suggest that care is often provided by an 'informal network'. This assumption of

the existence and activity of the 'caring network' is popular among policy maker in Hong Kong. The underlying implication of the network is that there are often a multiple unit of caring personnel who are active in providing care. The central focus of the 'network approach' is one the set of relationship between the elderly and the people around him. As being put forward by Garbarino (1983, p.4), the central idea of a network is

"a set of interconnected relationships, durable pattern of interaction and interpersonal thread that comprise a social fabric."

According to this perspective of analysis, the informal caring networks of the elderly people could be regarded as the relationship structure to which the elderly people belonged and the pattern of interaction within that structure of relationship. The 'network perspective' tends to assume that the existence of a set of relationship and the availability of the helping personnel with that relationship structure formed the basis of provision of informal care for the elderly people. However, three major problems exist in this network perspective :

First, there tended to be too much emphasis on the structure of the network rather than on the contents of the relationship. The implicit assumption behind this perspective which is largely wrong, is that all forms of relationships are potentially helpful. It has therefore overlooked the real basis of informal

care in modern society.

The second problem is closely related to the first one. Due to the optimistic assumption of the helping potential of relationship structure, the helpfulness of the relationship network has been over-stated. Thirdly, by looking at the relationship networks as potentially helpful, the naturalness and spontaneity of caring activities are too readily assumed and taken-for-granted.

While these three arguments will be expanded by the research findings in the subsequent chapters, I would only briefly discuss them below.

1. The Myth of Relationship Structure

As pointed out by Ward (1985, p.55), most research on informal caring networks for the elderly people focused on the structure of the network rather than on the contents of the relationship within this structure. Structural properties of the network such as proximity; composition and size of the network; frequency of contacts among members; density of contact as well as the stability of the network are usually regarded as important research issues (Ward, 1985; Lowenthal & Robinson, 1976; Timms, 1983). As far as the informal care of the Chinese old people is concerned, composition and size of the network may help to

understand who and how many people are engaged in a relationship linkage with the elderly, i.e. number of family members, friends and neighbours. But it does not go further indicating whether these relationship linkages are helpful. Although there are suggestions that a smaller network could be more effective, the size and composition could be no means stand alone to become an independent basis for analysing informal care. Frequency of contacts and density of the relationships tend to reveal more about the structural features of the network. But there is one similar but important weakness : when the contents of the networks are not explored, their helpfulness can only be assumed.

Proximity as basis of informal care has been questioned by a number of researchers. It has been pointed out sharply by Abrams that support networks are not necessarily based on geographical proximity, but rather on kinship, religion and race (Abrams, 1978, p.86; Bulmer, 1986).

The structural analysis of informal networks could only provide us with one dimensional view of informal care, and the assumption of care basing on this view could only be a simplistic one. What the structural analysis has unfortunately overlooked is the contents of the relationships in which elderly people are engaged (Allan, 1983). Fischer (1982) has warned that closeness of relationship and the density of contact could have two edges - on the positive side, it could mean the readiness and the

availability of a variety of help and support, but on the negative side, it could well mean a loss of privacy, compulsion and resentment. Furthermore, it could possibly bring about conflict and confrontation. To simply assume the presence of the positive effect of networks without noticing the negative effect could be fatal.

On the other hand, there is a vast difference between a frequent contact and a caring relationship, no matter how frequent the former and how distant the latter is. Living in the same public housing block, for example, an elderly person may have daily contact with his neighbours who just live next door and share the same corridor. But when he is ill, the married daughter who lives apart may become the one who is called for help, not the neighbours next door whom he meets every day.

Daatland (1983) commented that caring relationships were shaped by roles and expectations adhered to them. When neighbours do not recognise that they are expected to help in certain circumstances, they would not offer themselves because by doing so the role compatibility would have been lost and relationship would become tensed and uncomfortable. This 'role perspective of analysis' delineates a normative basis of care, implying that people in a certain role would naturally comply to role expectation.

To sum up, the presence of a structure of relationships does not necessarily mean that they could be readily converted into caring ones. The lesson for studying informal care for Chinese elderly people is essentially to examine more deeply the contents and quality of these relationships -- the functional aspects of caring relationships and the basis of such care.

2. The Function of the Network

In line with the over-emphasis on the structure, there is also a tendency to overstate the function of the informal caring network. The overstatement usually exists in two aspects: the range of care which the informal networks could provide is overstated; and the extent to which needs could be satisfied tends also to be overstated.

It is dangerous to assume that the informal networks could serve a full range of caring activities from spiritual needs to tangible needs. As pointed out earlier, the basis of care is not the structure of the network alone but the contents of the relationship. Apart from this, range of caring activities are, to a large extent, shaped by the perception of reciprocal advantages as well as the role expectations which they deem appropriate. For example, neighbours are much less likely than relatives to be involved in personal care and household tasks (Tinker, 1984 quoted by Walker, 1985), and friends and neighbours

are less willing or able than relatives to do the more arduous tasks (Seyd, Tennant & Bayley, 1984). Even when caring roles are expected from family members, the range of caring functions that they can perform still depends very much on their role competency apart from the important reciprocity.

The extent to which needs of the elderly could be satisfied by the informal networks deserves a closer examination. Walker (1985) remarked that sometimes caring networks were described as a powerful unit when in fact there was only one carer in the 'network'. On top of that, the duration of care would have a lot of implications on the quality of care (Parker, 1984). Prolonged demand on the carers would lead to change of the caring networks. When the resources of the carers are exhausted, or when the level of reciprocity has turned one-sided, the caring functions will likely be changed.

The caring function is not a static and unchangable phenomenon, but rather a constantly changing one. Any assumption about the functions of informal caring network have to be based on careful and realistic assessment of the quality of relationships, the division of care as well as the resources of the carers projected over time.

3. The Spontaneity of the Informal Caring Networks

In the process of looking at the informal caring networks, there tends to be a taken-for-granted view that these networks are naturally evolved. Pancoast and Collins (1974, p.24) have given a typical view of the 'natural networks' :

"Informal, spontaneous helping activities occur so often all around us that they usually pass without notice..."

This natural view of the networks has been adopted by Warren in his study of the elderly networks :

"The onformal social network appears to serve as a natural support system that functions to counteract the effect of stressful life events" (Warren, 1981 p.8).

To comment that the informal caring network are basically natural would have overlooked at least two aspects of social construction. The first aspect being overlooked is that the role expectations in relation to caring and non-caring are virtually socially constructed; the second aspect overlooked is that the division of labour in care by the criteria of age and sex is also created and reinforced socially.

The role expectations of the neighbours in relation to

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caring for the elderly, in contrast to the role expectation of the family members, are socially constructed as well as socially sustained and preserved. As argued in the Introduction, the family as a unit of care for the elderly has a lot to do with the mode of economic production of the society. Throughout the change of social contexts, the caring roles and responsibility of the family have still been sustained. The allocation of social welfare resources in residual welfare ideology could be an example. Another example of social construction in the division of care is the social security system. It has been argued by Finch & Groves (1983) that informal care is essentially care by family members, which is almost equivalent to care by women. The social security system, in order to sustain the caring role of women, ignores the fact that most families are dependent on two carers; it actively discourages roles reversal and it encourages women to give priority to their responsibility in the home (Land, 1978).

By ignoring the social construction of the caring networks and care, we may dangerously overlook a major issue in social policy formulation: who pays the price of informal care and why? Is there an alternative to the present practice? It has been cautioned by Walker that it would be too simplistic to accept uncritically the simple assumption that 'natural' helping networks are necessarily the best source of help (Walker, 1985).

The Basis of Informal Care :
Reciprocity Vs Normative Expectations

What the structure of relationship represents is a horizontal view of caring networks, which does not penetrate into the basis of informal care. Given that informal caring is not spontaneous, what then motivates people in the informal networks to help one another in some tasks which are compatible to their roles?

Abrams studied the informal care by neighbourhood and suggested that there were four distinct basis of active informal caring : altruism; tradition; status and reciprocity. He then concluded that

"reciprocity was the most widespread and influential of these bases of care, but they were forced to the conclusion that reciprocity was on some important respects a matter of possibilities within the caring relationship which some perceived and many did not" (Bulmer, 1986, p.10).

In other words, people engaged in caring activities not because of the existence of a relationship nor the presence of a role, but mainly of a perception of long- or short-term reciprocal advantages. It requires a compatibility of mutuality, not necessarily between the carers and the cared for, but could be in a chain of mutual helping relationships between and among

different people in the relationship networks. Although the concept of reciprocity was mainly being used in explaining informal care among neighbourhoods, it is also applicable in the relationship between family members and kins, where offering of help has commonly been regarded as normative and affective.

"Though neighbours did provide some help, and though there were certain bureaucratically organised assistance agencies, each had major drawbacks as a reliable and low cost source of aid. Neighbours lacked a firmly enough structured basis of reciprocation in a heterogeneous and mobile society. Kinship, by contrast, could provide this structural link, and could thus form a basis of reciprocation..." (Anderson, 1977, p. 171, quoted in Bulmer, 1986, p.105)

In this sense, the motive that led kin to help each other could also be regarded as a calculation of possible reciprocal advantages. A typical example in the Chinese family could be seen as that of a parent offering his/her help to the children with an expectation of receiving help in his/her old age. A person being helped by his friends would be expected to return help when there is an opportunity to do so. So the messages given to the carers and the being cared for are of two-fold : first, when care is being given, there is a calculated or estimated reciprocal advantage in the future. This could be considered as the pulling factor of informal care; and second, when care is received, there is a reciprocal obligation to return

this 'debt' in the future when circumstances arise. This could be considered as a pushing factor of informal care.

However, in a sophisticated relationship network, reciprocation may not be simple and straight-forward. The unit of reciprocity could be a group, whether it be a household, a family (nuclear, stem or extended) or a functional group instead of an individual. An example of this type may be found between two families where perhaps multiple range of caring activities could exist between different family members. On the other hand, reciprocity may take an indirect form and that the carer and the being cared for may not necessarily be the same person, but rather, they could form a chain of reciprocal caring relationships. An example of this type could also be seen in the family where the parents take care of (nurture) their own children, who in later days, would have to take care of their own offsprings. Another example related to care by family members could be seen in the three generational families where the grandparents take care of their grandchildren to exchange for care by their sons, daughters or daughters-in-law in the case of need. Similar examples could also be found outside of the family.

Nevertheless, what are the factors which sustain the reciprocal relationship is an interesting question to be explored, particularly in the face of the "diffused future

obligation" suggested by Blau (1964, p.93). The answer given by Blau himself is an element of trust, which perhaps is based on normative expectation and affective ties. What needed to be pointed out here is that reciprocity is not a calculation of isolated individuals, but is a collective behaviour supported by social norms.

On the other hand, whether reciprocity alone can fully explain the basis of care is a question to be qualified (Ungerson, 1987, 1990; Dalley, 1988; Hernes, 1987; Waerness, 1984). In the feminist perspective, the fact that informal care is mainly provided by female kin denotes a particular form of sexual inequality and gender oppression. Despite the fact that some women who are mostly educated and propertied seem to have improved their social status in the public sphere, majority of the women are still being locked in a subordinate position in the family (Ungerson, 1990). Since women are being regarded as more tender and affective, they are naturally the appropriate carers in the family. This assumption of gender role is an outcome of social construction in a patriarchally organised society whereby the state plays an important role in producing, sustaining and reinforcing the gender roles within the family (Ungerson, 1990; Waerness, 1984; Qureshi and Walker, 1989; Walker, 1988). Besides, how normative expectations and social sanctions intermingles with reciprocity, affection and social production is also an important question to be answered.

In sum, this chapter attempts to give a theoretical review of the definition and issues related to the concept of informal care. It is argued that care implies a relationship between at least two persons -- the carer(s) and the being cared for. Structurally it embodies both an element of affection and of labour; while functionally it is a total responsibility for the overall well being of the elderly person being cared for. It is also held that care of the elderly people is not a spontaneous action. Rather, it is an outcome of a continuous social production process in which the state plays an important part. In the following chapter, I shall begin to analyse the financial relationship between the Chinese old people and their family.

CHAPTER FIVE
FINANCIAL DEPENDENCY, FAMILIAL TENSION
AND INFORMAL CARE

In a capitalist society like Hong Kong, the issue of economic dependency and poverty among old people has long been taken-for-granted to mean personal failure. In Britain, this subject has only recently become a focus of social policy studies, and the poverty and deprivation of elderly people in the British welfare state has also become a focus of attention in some of the research. For example, Townsend (1979) in his study of poverty in the United Kingdom discovered that one third of those in poverty were elderly people. Arguing for the thesis of the social construction of dependency among old people, Walker (1980) pointed out that nine-tenths of the elderly people rely on state benefits for all or part of their incomes. Again, focusing on the subject of poverty among elderly women, Walker states that the risk of experiencing poverty is three times greater for those over retirement age than it is for those below retirement age, and that nearly two in every five elderly women were living on incomes on or below the poverty line as defined by supplementary benefit levels, compared with 28% of elderly men (Walker, 1987). Abrams, drawing on his research on old people, pointed out that 43% of the respondents needed extra income to live without any money worries and in reasonable comfort (Abrams, 1980). In relation to the problem of poverty and economic

dependency among old people generally, Abrams and his colleagues identified that adequate income (as defined by the elderly person) seems to be one of the most important factors contributing to life satisfaction (Abrams, 1983).

Like the situation in Britain, poverty among older people, particularly older women in Hong Kong has also long been an obvious phenomenon, albeit that it has always received less attention and criticism. As I have shown in the previous chapter, old people who remained in gainful employment in Hong Kong were usually working longer hours than the average worker, but their incomes were usually only about half (56% in 1986) of the median. The lack of a comprehensive pension scheme, in addition to the inequalities created by the labour market, puts the majority of Chinese old people in Hong Kong under serious pressure from poverty.

However, despite the concerns about the economic dependency and poverty among old people, financial support by adult children or the others in the family has not received due attention in the study of informal care. The reason for this is not too difficult to understand. Apart from the definition and interpretation of care which I have elaborated in the first chapter, there are several other reasons. In the first place, in the British welfare state, there is very little financial liability on the children to support their elderly parents. As far as financial

or economic dependency is concerned, it has been taken to mean "reliance wholly or partly, on the state for financial support" (Walker, 1982). Unlike Chinese societies, it seems that British families have not formally performed a mediating role between the state and the old people in providing financial support to the elderly people in need. Secondly, the policy of community care which has assumed the capacity of families and others in the informal network to care has not altered the financial relationship between the family and the old people. What has become controversial and has attracted serious debate is the division of care between the state and the family as well as the gender division of labour within the family (Finch & Groves, 1983; Finch, 1987; & Dalley, 1988).

On the other hand, 'informal financial assistance' was found to be a significant form of help offered by family members and relatives in the U.S.A. Horowitz and Dobrof (1982) found that two out of five (43.5%) of the caregivers who were children of the care recipients, and one sixth (17%) of other relatives gave financial assistance in the form of food, clothing, and other household expenditure. In another study on informal care, one third (37%) of the elderly people were reported to have received financial assistance from someone other than a spouse (Stephens and Christianson, 1986). What these studies have found, however, was still the costs incurred in the process of helping old people. There was no direct financial liability between old

people and their family members, which is quite close and important in Chinese society.

Despite the differences in the focus of study in the subject of informal care, informal financial assistance by family members has been found to be one of the most important components of care and support in Chinese communities. As pointed out in the previous chapter, nourishing one's old parents, which was taken to mean providing financial and material support so as to maintain them, was the minimum requirement of filial piety. There is a traditional saying among Chinese people : "To raise a son (in order) to prepare for one's old age; and to store some wheat so as to prepare for the famine." Although traditionally these practices were mainly expected from sons, the liability of children, regardless of their gender, to support and maintain elderly parents has generally been an expected role nowadays.

Apart from this, it has been a common traditional practice that individual income before marriage was largely regarded as 'family income' and was to be disposed for family purposes. As a matter of fact, the maintenance of a family purse which pooled resources earned by different family members together for family benefit was not only a function of the political economy, but also a measure of social control. Nevertheless, the practice of keeping a family purse may at the same time be an important symbol of family unity which the state as well as the family

itself would like to preserve. This is perhaps why this traditional normative expectation has been reinforced powerfully by various social policies in Hong Kong. The public housing rental policy is a typical example of this sort of social reinforcement. When a family undergoes a means-test when applying for a public housing unit, a 'family income' has to be calculated (which counts all members of the household regardless of marital status). So contributing financially to the elderly parents becomes both an obligatory practice as well as a practical need in many cases among Chinese families. This practice is even extended into the time when the sons and daughters are married and have established their own family.

Looking from this viewpoint, the financial contribution between adult children and old parents is a basic element in their relationship. However, in the Western scene, financial contribution itself may not be regarded as a form of informal care, and it does not necessarily consist such essential components as 'labour' and 'affect' in informal care (Graham, 1983). Yet in Chinese society, the financial relationship is so crucial between elderly parents and their adult children that its arrangements would very likely affect the provision of informal care by family members.

This section of the thesis is not an analysis of economic dependency among Chinese elderly people in Britain, nor does it

attempt to describe the existing problem of poverty among Chinese old people. It aims, rather, at analysing the financial tie between old people and their family members, especially their children and grandchildren, and at explaining how financial contribution from children affects the chemistry of intra-relationship, creates additional tensions between family members and influences the provision of care by them. Since 'nourishment' (financial and material support) was traditionally regarded as one of the most important aspects of care to be provided by children, it is important to assess and examine the extent to which Chinese old people are still nourished today. The chapter will also explain the reasons behind the changes and preservations which have taken place.

Financial Arrangements of Chinese Elderly

There are usually three major sources of income among Chinese elderly people in London : wages from gainful employment; state provision; and financial contributions from children.

1. Employment and Wages

As far as the Chinese old people in London are concerned, only a very insignificant number remained in wage employment (2 out of 46; less than 5%) at the time of interview. This employment rate is remarkably low compared to the figure in Hong

Kong. As pointed out in the previous chapter, only about one out of four (27%) old people aged over 65 were economically active in the year 1986 (Hong Kong Government, 1986). In addition, several sample surveys conducted in different districts of Hong Kong designed to explore the social needs of old people also showed that about a quarter (25%) of the respondents interviewed were in employment (Law, 1984; HKCSS, 1978; HKU, 1982). The fundamental difference in research design between the Hong Kong studies and the London study has obviously led to some of the differences in the findings. Because in the former, the samples of old people were those who were aged 60 and over, while in the latter research the definition of old people was those aged 65 and above. So there is a gap of 5 years in the definition of the age of old people, and there is a tendency for the 'young old' to remain in employment, particularly in the case of Hong Kong. Despite the difference in definitions, the main cause of disparity in the elderly employment rate in the two places lies in the operation of the labour market and the related government attitude and policies.

The government of Hong Kong, as commonly known, has intervened in the labour market as little as possible by minimising legislation and by providing very minimal financial assistance to the people who are too old to work. Any intervention in the 'free' market is considered as interference which is likely to bring about negative effects and therefore has

to be avoided as far as possible. As pointed out in the previous chapter, old people aged 60 and above are eligible for a means-tested public assistance, which is provided at the rate of HK\$640 a month (roughly L50 at current exchange), but old people who receive a contribution from their families of HK\$640 a month or more are not eligible. In cases where old people receive family contribution of less than K\$640, that amount is deducted from the amount of public assistance. By the same logic, old people who are 60 or over who live with their family may also be eligible for public assistance, provided that their children are willing to declare officially that the old people were not given any financial contribution.

Superficially, this public assistance policy in Hong Kong is one which discourages rather than encourages family financial support, because a successful application by the old people relies basically on the failure of family support. However, when the social stigma arising out of 'family failure' is taken into consideration, the policy has successfully placed the primary financial responsibility on the family and consequently it makes it less possible for old people to be on public assistance.

The public assistance and the old age allowance policies, combined with the refusal of the government to set up any kind of contributory pension scheme, has indirectly forced old people to stay in the labour market which is ready to absorb some of them

who have no choice but to work at a very low wage. The lack of old age protection gives many old people no choice but to remain in the labour market for as long as they can and as long as they need to maintain themselves. This conclusion is echoed by Chow in his analysis of elderly care in Hong Kong who argued that "the meagre incomes that most older workers earn indicate that the elderly are probably working from necessity rather than choice" (Chow, 1983, p.578).

2. State Provisions

Contrasting sharply with the situation in Hong Kong, a great majority (82.6%) of the Chinese old people interviewed in London were found to be either receiving state pension or supplementary benefits, and these are the major source of their income. However, research conducted among low income families in Hong Kong showed that only about one sixth (16%) of the old people relied on public assistance as their major source of financial support (Chow 1984). The reason for the reluctance of the old people to apply for state financial assistance in Hong Kong has been argued earlier. It is not my intention to argue that financial provision in Britain has offered an adequate financial protection for elderly people so that they can lead a dignified old age. On the contrary a number of research studies have pointed out that many old people suffered from poverty.

Interestingly, however, Chinese old people, as an detached and isolated minority racial group in this country, often referred and compared their experience of living not with their British counterpart, but to the way of life of the old people in Hong Kong. This failure to compare their experience with that of the majority of the people in this country is partly a result of their social isolation which virtually offers them very little point of making reference with the way of life of people in this country. As an inevitable consequence, Chinese old people can only compare their present experience with that of their past, which was their way of life before coming to this country. This kind of cross-national comparison among Chinese old people has led them to a belief that they were enjoying a much higher level of freedom and independence than their friends and relatives in Hong Kong and in China. This is a very peculiar kind of self-fulfilling prophecy , perhaps only able to happen in such an isolated minority group which has very little contacts with the local way of life due to the language and cultural constraints. The following quotation from among the Chinese old people in my sample is a good expression of their views :

"Do you intend to return to Hong Kong or China for the rest of your old age?"
(Interviewer)

"No, certainly not!" (Old person)

"Why?" (Interviewer)

"There is no means to maintain myself if

I return. Who's going to support you when you're back? You can't rely on the public assistance to maintain your living, can you? I'm free and comfortable here and I don't have to ask (for money) from my sons and daughters. If they would like to give me money I'll be happy, but if they wouldn't I can survive without." (Old person)

Another Chinese old person had expressed a similar view about receiving financial assistance from the state :

"Of course I can't say that the present situation (receiving supplementary benefits) is ideal. The best thing for me is to be self-sufficient. But you see, I cannot do much work (gainful employment) at this age. Even if I wanted to work no one would employ me. I don't want to rely on my children. My daughters are married, and my son has a family at his back. I don't want to ask from him. Now I feel quite good that the government is giving me this amount. It's not a big sum, but I can maintain myself if I keep a tight budget."

3. Financial Relationship With Children

It has apparently been a common practice in Chinese society for the adult children to support their parents financially when they were old. Recent research conducted in Hong Kong has confirmed that this practice still exists. About half of the elderly people interviewed in research on low income families said that their financial support from children was the main source of income by which they maintained themselves (Chow and

Kwan, 1985). Other research conducted in Wanchai, Hong Kong also confirmed this trend. According to the Wanchai research, more than half (58.7%) of the elderly respondents relied on the children and grandchildren for financial support (Law, 1984). In addition, a survey conducted in a new town (Tuen Mun) of the New Territories where majority of the families are small and nuclear indicated that over half (55%) of the old people received financial contribution from their children, though it is not known whether this is their sole source of support (Tsang, 1987). A recent survey conducted in Kowloon similarly found that about one third (30.9%) of the old people interviewed received contributions from their married sons and daughters, while another 33.8% respondents received financial support from their unmarried offspring (SOCO, 1989). My Hong Kong study also showed that 35.3% of the old people received financial support from their son(s) who lived together, and another 23.5% were supported by their son(s) who lived apart. Assessing from these findings, it appears obvious that the financial relationship between Chinese old people and their children, regardless of their marital status, has been active. Furthermore, roughly about one out of two Chinese old people depended solely on the financial support of their children in order to maintain themselves. By contrast, it was shown in the Wan Chai Study that only a very small minority (6%) of the respondents relied on public assistance or private pensions for economic maintenance.

Contrasting sharply to the findings of the Hong Kong research, the research conducted in London among Chinese old people has revealed a rather different picture. It found that financial contributions from children to old people can be divided into two tiers. The first tier of contribution is regular and stable. Old people may receive periodic contribution from children as a sole support to maintain their living. This is being made usually bi-weekly or monthly depending on how children themselves are being paid by their employer. In other words, old people may have no other means of income to support themselves besides the financial support from their children. A kind of dependent relationship is likely to be seen in these circumstances. However, old people who are financially dependent on their adult children may or may not necessarily live together with them.

The second type of financial relationship between old people and their family does not encompass a dependent relationship. In other words, old people may receive money from their adult children, but they do not depend on their contribution to maintain themselves. This could be found in cases where old people have other means to support themselves and, in circumstances where contributions from children are not sufficient for daily maintenance. In these cases financial contributions from children may carry an implication other than that of a sense of dependency.

Unlike the situation which was found by various studies in Hong Kong where old people actually relied on the financial support of their family members in order to maintain their own living, this study in London among Chinese old people found a rather paradoxical situation. Firstly, only a very small minority of old people actually received regular (monthly) cash contribution from their children. This finding contrasts sharply with the Hong Kong studies. Only two old people out of forty six (1.7%) interviewed responded that they had received a monthly contribution from their children. On top of this, none of the old people received a monthly contribution from their grandchildren. This finding shows that very few Chinese old people in this country actually depend on their family members for financial maintenance. These two old people mentioned were old women who joined their children just for a few years. They have never been engaged in gainful employment, and they were not receiving any kind of state financial provisions or occupational benefit. On the other hand, many of the old people interviewed were proud of the fact that they did not need to depend on their children for money.

However, although the London study showed that very few Chinese old people actually relied on their children for financial maintenance, it is wrong to conclude that financial ties between old people and their families, particularly children, are inactive. A further analysis of the data showed

that irregular financial contributions from children to old people are still active, although the financial relationship is not as intensive as in the case of Hong Kong.

TABLE 5.1 : FINANCIAL CONTRIBUTION FROM CHILDREN
IN LONDON

	N	PERCENT
MONTHLY	2	1.7
IMPORTANT OCCASIONS	12	10
IRREGULAR	25	20.8
RARE	51	42.5
NEVER	30	25
TOTAL	120	100

As indicated in Table 5.1 above, about one out of three (30.8%) children of the old people have contributed money to their elderly parents in important occasions, such as in Chinese New Year and other festivals, as well as in irregular intervals. By irregular contribution it usually ranged from less than once a month to once every two months. Besides, a significant proportion of children did contribute, but the frequency of their contribution was less than six times a year.

Compared to the situation in Hong Kong where more adult children are found to be the sole financial supporters of

their elderly parents, the financial contributions of Chinese families in Britain are not regular. Contributions on an irregular basis implies obviously that elderly parents cannot rely on them for maintaining their daily living.

How can we sufficiently understand the differences in the financial relationship between Chinese old people and their children in London and Hong Kong? This question can be answered on two different but related dimensions. In the first dimension I shall relate to the issue of dependency of old people on their family, while in the second dimension I shall discuss the issues of financial contribution, familial tension and the production of informal care for Chinese old people.

Family Contribution and Dependency

There is always a dilemma between receiving financial support from the family to which one belongs and receiving cash assistance from the state. In a society where the belief of 'self-reliance' is equal to respect and dignity, very few people would choose to receive cash assistance from the state. This does not mean that these people have any choice, but the decision may reflect the need of people to avoid the sense of guilt, defeat and stigma. Walker (1982) suggested that in a capitalist society, economic dependency among old people is socially constructed. This thesis of structured dependency suggests that

one should look beyond the taken-for-granted tradition about the life cycle dependency of old age. Old age, echoed by Philipson and others,

"...is a social rather than a biological constructed status. In the light of this, we need to see many of the experiences affecting older people as a product of a particular division of labour and structure of inequality rather than a natural concomitant of the ageing process" (Philipson et al., 1988, p.53)

In a capitalist society where old age and economic dependency are considered as synonymous, it is not surprising that old age has been associated with inferiority, shame and guilt. This is particularly so among the group of old people without independent and acceptable means of financial support.

In order to avoid this feeling of dependency, many Chinese old people, particularly those in Hong Kong, would prefer to strive hard and to remain in gainful employment so as to maintain their own living and to be rewarded with the positive social label of being 'self reliant'. This is also an identity building process in old age, because through remaining economically active old people can establish their independence and self worth. However, for the Chinese old people who are compulsorily removed from the labour market or who cannot remain there for other reasons such as poor health, the common alternative is to

withdraw and to rely on their family members, most commonly their sons and daughters, so that the family can be given a positive regard for 'filial piety'.

In promoting self help in supporting old people, the traditional belief and practice of filial piety, such as the support of the old, are being praised and morally rewarded. On the other hand, those children who do not comply with this traditional normative expectation may receive moral disapproval, and thus in turn would experience a sense of guilt and shame. Apparently this social practice between elderly parents and children has also been socially constructed, enforced and reproduced by social policy. The social security policy in Hong Kong with regard to financial protection of old people is a typical example of this social construction. According to the philosophy of the Hong Kong government, financial support by family members is a symbol of self-reliance, and by the reinforcement of various social policies, the unit of care, including financial maintenance, is always taken to mean the family. This point of argument will be further elaborated in the final chapter where I shall discuss the social production of family care.

As I have pointed out in the chapter on traditional Chinese familism, old people enjoying the fruits of their labour was regarded with a sense of pride. This was a social reality

constructed by the then economic mode of production. But when the family ceases to be the prime economic unit and old people have lost their economic value in the family, reliance on the family for financial maintenance has become increasingly ambiguous. Obviously to the old people themselves, total reliance on their family members also implies a kind of dependency which brings about tension and uneasiness. But due to the concomitance of moral and normative reinforcement, financial contribution from children can also bring about gratification and pride. This is precisely how Chinese familism in modern capitalist society like Hong Kong and the Chinese community in Britain is being intruded upon and penetrated by the capitalist mode of economic production, and it also highlights how old people perceive their financial dependency on their children.

This helps to explain why the majority of the Chinese old people in Britain do not rely on their children for sole and regular financial support in order to maintain themselves; yet at the same time receiving some financial contribution from children can be effective in bringing about dignity and worth.

"I don't have to ask my son and daughter for monthly financial support. With this amount of benefit I received I can be able to maintain myself. Of course I cannot say that I am financially well off, but you see it is a good feeling 'cause I do not need to rely on them. They have their own family to support. But still my son and my daughter they

sometimes give me some pocket money. Certainly I am happy because after all they give the money not because I ask for it. Sometimes I feel that this is filial piety" (Old woman, 79 years old).

Besides the argument that total reliance on the family by old people today has brought about dependency and inferiority which many Chinese old people may choose to avoid, financial contributions, being given at irregular intervals, has very often been a blurred and ambiguous activity which both old people and their offspring would prefer to leave unclarified. It is because in the first place, the normative role expectation for financially supporting elderly parents is so forcefully reinforced by various social policies which inevitably resulted in a demand on the children to contribute and the elderly people to expect. In the second place, the practical difficulties of elderly people and their children makes it both very difficult for the children to contribute and for the elderly parents not to receive.

This is perhaps the most ambiguous part of the relationship between the Chinese old people and their sons and daughters. This state of ambiguity can be explained as a kind of avoidance of both parts in facing the issue, as it is so sensitive and delicate that both parties prefer to maintain the status quo so as to enjoy a period without tension and conflict.

There are however some circumstances where old people and their children cannot avoid bringing the issue to the fore. This is usually a situation where one of the parties cannot cope with the status quo due to a change in financial circumstances, for example, loss of income of the children or increase of financial demand of the old people. Tension would very likely arise between the family members, notably between old people and their children, as well as between the old people and their daughters-in-law. There are sometimes also tensions between the son and his spouse because of the financial contribution given to their own parents. Therefore in Chinese society members of the family are cautious in handling the financial relationship. To the elderly people as well as to the children, who are the most appropriate persons to offer financial support becomes a delicate issue to handle. In the following section I shall discuss the meaning of financial contribution in the Chinese community and then I shall attempt to analyse how financial contributions are likely to affect the caring roles and relationships within the family.

The Meaning of Financial Contribution

Financial contribution given by children to their elderly parents as a kind of income maintenance was a relatively 'new' practice in Chinese families. In the agrarian Chinese society where the production and the family purse were collective, elderly people who enjoyed a senior position in the family were

in a powerful position to decide upon the allocation of familial resources. The children's share of resources was a decision of the 'senior members' who were supposed to act for and on behalf of the interests of the whole family. The size of the children's share depended both on their ascribed and achieved status within the family, such as gender, age, lineage, marital status as well as effort and level of participation in the economic production and the contribution to the interests of the whole family. In view of the patriarchal-patrilineal-patrilocal feature of the traditional Chinese family, financial contribution from children to elderly parents as a kind of income maintenance was not a real issue since the family purse was controlled by the patriarch. For those small families who did not live together with the patriarch, nourishment (meaning financially and materially maintaining the old people) had become a minimum requirement of filial piety. Children were also expected to show respect the seniority of their elderly parents and to take care of them when they were old and frail. Taking care of the frail elderly referred mainly to 'tending' and taking care of their daily personal and physical maintenance. What has been argued here is not that financial contribution does not symbolise filial practice as expected in the Chinese traditions, but that the practice of cash contribution has a particular social context, and the meanings of which has to be viewed and explained with reference to the particular social and economic contexts under which it emerged.

The practice of cash contribution in the Modern Chinese family cannot be dissociated from the emergence of a 'free' labour market, wage labour, and retirement as well as the economic dependency of the frail elderly people. The structured dependency among old people (Townsend, 1981; Walker, 1982) not only created a relatively low social status of the elderly people in the society, but had also diminished the powerful position of old people in the Chinese family. In the case of the Chinese families, the status of the old people has changed consequently from a decision maker to a dependent, this is particularly true for the majority of old people who are not financially protected by any kind of state or private pension schemes. What does financial contribution by children mean in this social context?

Firstly, the financial contribution may still be a symbol of traditional filial piety as nowadays money has been taken as a symbol of nourishment. This normative basis of providing cash contribution, as argued earlier, is forcefully sustained and reinforced by the existing state policy in Hong Kong. Although only a few Chinese elderly people (26.1%) who were interviewed in London agreed that "to raise a son is to prepare for one's old age", the majority of them (69.6%) agreed that children should follow the filial expectations, and half of them (50%) agreed that children should be responsible for the financial maintenance of elderly parents (Table 5.2). Similarly in Hong Kong, 88% of the elderly respondents agreed that filial piety should be

practised today, and 76% agreed that children should support them financially.

TABLE 5.2 : OPINION OF OLD PEOPLE
RELATING TO INFORMAL CARE

NB The figures within the < > represent Hong Kong findings

	AGREE %	DISAGREE %	NO OPINION %
TO RAISE A SON IS TO PREPARE FOR OLD AGE	26 <65>	70 <18>	4 <18>
AN ELDERLY IS LIKE UNTO A TREASURE AT HOME	46 <59>	43 <18>	11 <23>
CHILDREN SHOULD FINANCIALLY MAINTAIN THEIR PARENT	50 <76>	39 <6>	11 <18>
CHILDREN SHOULD TAKE CARE OF THEIR ELDERLY PARENTS	80 <76>	15 <6>	5 <18>
CHILDREN SHOULD FOLLOW THE FILIAL PRACTICES	70 <88>	20 <0>	10 <12>
OLD PEOPLE ARE A BURDEN ON THE FAMILY	35 <53>	61 <41>	4 <6>
OLD PEOPLE SHOULD TRY THEIR BEST TO HELP IN THE HOUSEHOLD CHORES	76 <70>	20 <12>	4 <18>
IF YOU DON'T HELP OTHERS IN NEED, OTHERS WILL NOT HELP YOU IN RETURN	61 <88>	35 <0>	4 <12>
HELPING IS AN EXCHANGE BETWEEN FAMILIES	54 <NA>	41 <NA>	5 <NA>

These findings reflect the presence of normative

expectations for filial practice of children among Chinese old people, even though they may realise that "to raise a son is to prepare for one's old age" is no longer a matter of the reality.

However, what is very important to note here is that the requirement of nourishing old parents which was expected as filial piety has been replaced, at least partially, by the contribution of cash. In other words, earning capacity in modern capitalist society has been introduced into the familial relationship, and alienation within the family has come into the process of nourishing. The fact that financial contribution has partially replaced nourishment and tending helps to explain why Chinese old people are found to be proud of their children's financial contribution, although the amount is far from sufficient for maintenance of independent living. This analysis also sheds light on our understanding of the impact of the financial contribution on the family relationship and the division of caring responsibility within the family. I shall however focus my discussion on this point in the next section.

Apart from the symbol of filial piety, the second meaning of offering cash contributions to the elderly parents is the expression of affection. This is particularly true for the mother-son relationship where affection was specially developed in the uterine family. There are obviously different implications between a symbol of cash and a symbol of care and

labour in a capitalist society. This topic, however, is not the focus of the argument in this discussion, yet in this context, cash is used as a symbol representing the compassion and affection of the children.

The third meaning of financial contribution is that of satisfaction of practical needs. This is particularly true in the societies where elderly people have no income protection after they have retired from their employment. When the state, through various legislation and policies, denies its responsibility for taking care of the economic needs of the elderly people, dependence on the family for financial maintenance becomes a practical necessity. This kind of relationship can most easily create guilt, resentment and conflict between children and the old people, because, on one hand, both the elderly people and their children are being bound by strong social and economic forces into a financial relationship, but on the other hand, they may not be practically capable in fulfilling the role expectation. So to the family members who are supporting their elderly parents, they have experienced an additional financial 'burden' which is difficult to cope with but at the same time they have no way to escape. This financial 'burden' on the family, is created not by the physical frailty of the old people alone, but largely through a social process which is further sustained by government social policies.

The final meaning of the financial contribution is that it is a form of reciprocity. It is argued here that a financial contribution is not an one-way contribution from the children, but rather a two-way exchange between the children and their elderly parents. Usually in the Chinese family, reciprocity between the children and the elderly people takes 2 different forms : reciprocity alongside the ascribed family relationship and reciprocity achieved in later social connections apart from the ascribed ones. Ascribed reciprocity takes place usually directly between the relationship of parents and child where the old parents had raised up the son or daughter, now it is an reciprocal return for the children to maintain the elderly parents. Alternatively, achieved reciprocity relies on the contributions of the old people to their children and their families. However, in practical situations these different meanings are often intermingled and it is not always possible to separate them. In the following section I shall discuss the impact of the financial relationship on the familial relationship and on the division of care within the family.

Financial Contribution and Familial Tension

It is quite obvious that financial contributions from children to old people has been a widespread activity among Chinese families in London and in Hong Kong, although the nature and intensity has been found to be different. How can we

properly appraise the impact of financial contribution on family relationship? In order to have a thorough answer, we need to examine in detail the findings of the London study.

When old people in London were asked who they would approach for help if they faced financial difficulty, nearly one out of two (45.6%) old people answered that they would approach their son(s). Only one out of ten of the respondents said that they would seek assistance from their daughter(s). Interestingly, all those whose answers were daughters were old women. This question was one which was both hypothetical and practical, because it reflected both the experience and expectations of Chinese old people. This finding showed very clearly that, apart from those who had no relatives at the time of interview, the majority identified their closest family members --sons or daughters.

TABLE 5.3 : SEEKING FINANCIAL SUPPORT BY SEX OF OLD PEOPLE

	MALE %	FEMALE %	TOTAL %
NO ONE	/	10.9	10.9
SON	19.5	26.1	45.6
DAUGHTER	/	10.9	10.9
DAUGHTER-IN-LAW	/	4.3	4.3
SON-IN-LAW	/	/	/
FRIENDS	10.9	/	10.9
OTHERS (e.g. KINS ASSOCIATION, WELFARE AGENCIES)	/	17.4	17.4

However, what is more important to note here is that for old people asking for financial assistance from sons or daughters in case of need is an activity which is by nature quite different from receiving a voluntary contribution. Although I have argued above that cash assistance from children has a double-bind meaning fused with shame and pride, to take the initiative and to ask for help, even from family members, still creates a sense of dependency similar to some extent to that of making application for public assistance. Yet in this ambiguous situation the majority of old people chose to approach their sons for help. There are two dimensions of explanation which account for this. Firstly, it is more acceptable according to traditional value to rely on son(s) than to rely on daughters, thus the sense of dependency and inferiority on the part of the old people can be neutralised by the approval of normative beliefs. Secondly, sons are usually in the position of keeping the family purse. This is true not only in the sense that the labour participation rates of Chinese men are higher than those of women in both London and Hong Kong, it is also prevalent even in cases where both husband and wife are economically active.

Nevertheless, the fact that men are usually the keepers of the family purse does not necessarily mean that they are as powerful as in the traditional Chinese family. Rather, as argued in the previous chapter, men in modern Chinese family are no longer the absolute patriarch. Rosen (1978) researched the

family life of the middle class family in Mei Foo Estate in Hong Kong and found that wives, particularly those who are economically active, usually shared decision making with their husband. Mitchell (1976) who studied family life in urban Hong Kong also revealed similar findings. According to him, wives who did not like to live with their mother-in-law could exert pressure to their husband to take appropriate action (Mitchell, 1976). In a more recent research conducted in a new town in the New Territories, I found that family decisions ranging from investment to the purchase of family appliances are made jointly. Even in some cases children have participated in the decision making process, but of course it is the family head -- the father -- who has the final say (Chiu, 1989).

As with traditional familism, in-law relationships in modern Chinese families are still a potential area of tension and conflict. But because of the rising status of women, in-law tension has seemingly become more subtle. Instead of being required to be directly accountable, wives today interact with their in-laws through their husbands. This pattern of interaction is true vice versa. As far as financial assistance is concerned, most old people expected that their sons are the one who should help, but the sons have to be accountable to their wives who increasingly share power in making family decisions. This is a source of familial tension which is likely to threaten the relationship between old people and their family members.

It is apparent that sons still carry a special expectation from their parents in the modern Chinese family, and they have always played a central role in the production of care. Apart from the finding that they are expected to render financial assistance whenever it is required, more sons than daughters have made financial contributions to their elderly parents in actual practices. The London study showed that among those adult children who have a financial connection with their elderly parents, the majority (70%) are sons (Table 5.4 and 5.5). Sons are not only shouldering heavier expectations, the findings clearly show that they respond more actively and positively to these expectations, compared to their female counterparts.

TABLE 5.4 : GENERAL PROFILE OF FINANCIAL RELATIONSHIPS
IN LONDON

	MONTHLY	IMPORTANT OCCASIONS	IRREGULAR	RARE	NEVER	ROW TOTAL
SONS	2 1.7%	9 7.5%	16 13.3%	35 29.2%	21 17.5%	83 69.2%
DAUGHTERS	/	3 2.5%	9 7.5%	16 13.3%	9 7.5%	37 30.8%

TABLE 5.5 : FINANCIAL CONTRIBUTION FROM SONS AND DAUGHTERS

	MONTHLY	IMPORTANT OCCASIONS	IRREGULAR	TOTAL
SONS	2 (5.1%)	9 (23.1%)	16 (41%)	27 (69.2%)
DAUGHTERS	/	3 (7.7%)	9 (23.1%)	12 (30.8%)
TOTAL	2(5.1%)	12 (30.8%)	25 (64.1%)	39 (100%)

Similar findings were found by Mitchell in a study conducted in Hong Kong among Chinese families. According to Mitchell, two thirds (65%) of the married men and two fifths (44%) of married daughters gave their parents money. (Mitchell, 1976) Apart from confirming that sons have a special responsibility in supporting their parents financially in the context of Hong Kong, Rosen (1978) suggested that it is usually the eldest son who shoulders this responsibility. According to Rosen :

"...the traditional Chinese requirement for the eldest son to shoulder this responsibility seems highly functional and appropriate insofar as he is the most likely to have reached the 'launching' stage with his own children at the time when his parents need him most" (Rosen, 1978, p.624).

It is unfortunate that financial contributions by sons in general and by eldest sons in particular are explained only in terms of the "life cycle" of the children, and that the socio-economic background is not taken into account. On the other

hand, Mitchell's colony-wide study seems to have revealed a deeper message. According to Mitchell, adult sons who have higher family incomes are more likely than less well-off sons to give money to their parents (Mitchell, 1978).

In the London study, it was found that the birth order of the children was an important factor affecting the financial assistance to elderly parents, although it did not appear to be predominant. About one out of three (30.9%) old people received money from their eldest child in which majority are sons, while one out of four (26.1%) received from their second child and one out of five (19.5%) of the elderly respondents reported that they received financial contribution from the third child (Table 5.6).

TABLE 5.6 :PERCENTAGE OF OLD PEOPLE RECEIVING FINANCIAL ASSISTANCE BY THE ORDER OF CHILDREN

	ELDEST CHILD	2ND CHILD	3RD CHILD	4TH CHILD
MONTHLY	/	/	4.3%	/
IMPORTANT OCCASIONS	10.9%	10.9%	4.3%	/
IRREGULAR	20%	15.2%	10.9%	4.3%
COLUMN TOTAL	30.9%	26.1%	19.5%	4.3%

In addition, the findings show that the majority (79.5%) of the adult children who made financial contribution to their

elderly parents were married and the findings further show that about half of them (49%) live together with their parents (Table 5.7).

TABLE 5.7 : MARITAL STATUS OF CHILDREN WHO MAKE FINANCIAL CONTRIBUTION

	MONTHLY	IMPORTANT OCCASIONS	IRREGULAR	ROW TOTAL
SINGLE	/	3 7.7%	5 12.8%	8 20.5%
MARRIED	2 5.1%	9 7.7%	20 51.3%	31 79.5%
COLUMN TOTAL	2 5.1%	12 30.8%	25 64.1%	39 100%

From the analysis of the above findings, a chain of factors can be related to explain the financial support given to elderly parents by family members. A simple characterisation can be as follows : old people are likely to be assisted financially by a son who is married, living in the same household and who is more likely to be the eldest in the family. What is important for further analysis however, is the tension in relationships it is likely to arouse in the family and how it may affect adversely the production of care for old people.

As shown in the findings of the London study, only a very small minority of the adult children who live together with the

elderly parent(s) are reported to have made no financial contribution. In many cases where adult children are reported to have made rare contributions, at the same time they bear most of the living costs of the old people who lived with them. Such living costs may include food, fuel, and in most cases accommodation and other miscellaneous expenses. So financial assistance from adult children may not only include a cash contribution, but in many of the cases in which a cash contribution is not present, in-kind benefits are often found.

What is likely to be the consequence of old people having an active financial relationship with their adult children? Chow suggested in a study in Hong Kong that a majority of the families who supported their elderly parents financially were usually those who maintained satisfactory relationships with them (Chow, 1987). However, a somewhat contradictory finding was revealed by Chan (1985) in a study of elderly abuse in Hong Kong which suggested that financial dependency of old people on family was an important factor leading to the abuse. The differences in these research findings imply that financial contribution by family members in general and by adult children in particular is a two edged sword which could cut in both directions. As I have argued above, a financial contribution can be used by children as a symbol of affection. In this light, it is not difficult to understand why Chow found financial support of adult children associated with satisfactory relationships. Nevertheless,

simplistic explanations can sadly lead one to overlook the possible tensions which may arise out of money matters within the family. This is particularly true in cases where young Chinese wives are more educated and financially active, because it would be increasingly intolerable for them to shoulder the financial costs of their in-laws. Rosen (1978) observed that harmonious relationships were established mainly among those elderly in-laws who were both willing and resourceful enough to contribute reciprocally to the family. Apparently, the ability of the old people to return reciprocity to their adult children is of utmost importance. The problem is, however, when old people have nothing to contribute due to reasons such as poor health and economic dependency, tensions in relationships would naturally tend to arise.

However, this relationship tension very seldom existed directly between the elderly parents and the in-laws, though traditionally this was the set of familial relationship which was most likely to arouse conflict. In the modern Chinese family, tensions are more likely be of a triangular shape which is seen between the old people, the adult sons and their wives. This is particularly so in middle class families where the wives are educated and economically independent. The reason behind this is mainly that in Chinese families the son is still the one who shoulders the expectations as well as the responsibility of nourishment. The old people usually asked for assistance from

their sons who, unlike in the older days, do not have the absolute authority in deciding the family expenditure. As argued earlier, the wives tend to have increasing influence in the family who, in addition, does not owe as much reciprocity to the older in-laws. As far as the return of affection is concerned, the daughter-in-law does not have a kind of special affective relationship with the mother-in-law which, in the case of the son, was developed out of the uterine family. This is a very subtle kind of relationship tension seen in the modern Chinese family particularly in circumstances where financial assistance to elderly people is involved. I have pointed out that in the traditional Chinese family it was usually the daughter-in-law who suffered from this tension. But in modern family, it is most usually the old people who suffer. Rosen (1978) recorded how old people were asked to move out from the co-residence with their sons, and in the London study similar complaints were reported by the Chinese old people.

To conclude, the financial relationship is an important part of the human relationship in Chinese familism. On the part of the old people, receiving financial contribution from their adult children is an experience fused with pride and shame. This is not a 'natural' or traditional phenomenon but one which is created and reproduced by the political economy and various social policies of the state. Financial dependency on the family, in the case of Chinese elderly, can equally arouse a

sense of inferiority and guilt, although this can be neutralised by social approval if the reliance is on the son.

The London study showed that financial activity between old people and their adult children still exists, although it is of a different nature and intensity compared to the situation of Hong Kong. Compared to their counterparts in Hong Kong, Chinese old people in London are proud of not depending on their children, but they are still gratified by their financial contribution.

I have also argued that sons in Chinese familism have a special role to play as far as nourishing old people is concerned. They are not only shouldering the main expectations of nourishment, but they are also the brokers of care provisions. Tension is found to be prevalent in the triangular relationship between the elderly, their sons and the daughters-in-law, which inevitably affect the division and production of care for Chinese old people. I shall discuss these themes in the subsequent chapters.

CHAPTER SIX

LIVING ARRANGEMENTS, FAMILY RELATIONSHIPS, AND INFORMAL CARE OF CHINESE ELDERLY

This chapter is about the Chinese old people and their families. As has been noted by various researchers, the structural features of a family, including the family and kinship size, residence pattern, as well as the pattern of interaction, are of great importance in understanding the pattern of family relationships within which an elderly person is located (Townsend, 1963; Shanas, 1968; Qureshi and Walker, 1989). Furthermore, it is also pointed out by Qureshi and Walker (1989) in Britain and Chow (1987) in Hong Kong that the provision of care to elderly and disabled people is a function of the structure of the family and the family relationship from which it emerges. It is therefore the aim of this chapter to uncover the important structural features of the relationship between Chinese old people and their family as studied in London and Hong Kong and to explain how these features are likely to affect the production of informal care in the Chinese community.

To begin with, I would try to correct some common but distorted beliefs about ageing and family which prevail particularly in Chinese circles. The first point concerns ageing and dependency and the second is about the negative influence of

the 'western family'. It is important to do so because in the Hong Kong context, policy planners often have a distorted reaction to the dependency of old people which, as a consequence, exaggerates the problem of dependency and ageing. As far as informal care is concerned, I have pointed out in the first chapter that the role and function of the Chinese family has not been properly examined. There is often a misunderstanding that the western family is breaking up due to modernisation and industrialisation, and that the Chinese family is following this trend because of westernisation. Both of these misconceptions have to be clarified before the discussion of Chinese family and informal care of Chinese old people can be placed in the correct context.

The Myth of the 'Problem of Old Age'

Old people in the Chinese society of Hong Kong has commonly been portrayed as 'problematic', 'dependent' and 'burdening'. These three negative labels on old people are in fact a consequence of a series of interacting social factors. Firstly, in a capitalist society like Hong Kong, those who are not economically active and productive are usually stigmatised as a burden. Recipients of social welfare services who do not participate in economic production, such as the poor and the elderly, are therefore often regarded as burden on the society and are regarded with moral disapproval. Because old people are

generally excluded from the labour market, they are often associated with incapacity and uselessness, and thus are assumed to be dependent on the care of other people. In addition, the increasing elderly population creates the magnitude of the 'problem'. These negative labels, which reflect the common belief of the general public, have also been reflected in the social service planning in Hong Kong. For example, the Honourable Y.F. Hui, who is the Director of the Hong Kong Council of Social Service as well as the welfare representative to the Legislative Council, has stressed on the need to respond to the problem of ageing, in his speech on Ageing in a Contemporary Society to the Asia and Pacific Regional Conference:

"The universal problems of the aged have been steadily growing during the last decade. Countries in the Asia and Pacific Region have been trying to harness this social problem at the national policy planning level while relying on informal support network for the care of the elderly....To the aged explosion warning, governments in the Asia Pacific Region have responded more slowly..." (Hui, 1989, p.1; p.8).

The irony here is that the over-emphasis on the problem of old people would tend to aggravate the difficulties faced by some old people rather than to relieve them. As has been pointed out by Walker, the exaggerated reaction to population change is completely at odds with the facts of ageing (Walker, 1980; see also Walker and Qureshi, 1986). As a matter of fact, early

research findings by Townsend (1958) showed that the majority of the old people who were placed in institutions in the 1950's were mentally and physically capable of being independent. This finding was further substantiated and evidenced by Tinker (1984) who found that majority of old people who were either in the community or in residential homes could manage to take care of themselves. In addition, Hunt's (1978) survey on old people living in the community also showed that the majority of the old people were functionally capable. Therefore, Walker and Qureshi (1986) justifiably remark that the vast majority of elderly people are able to care for themselves entirely without help or with only minimal support, informal care for elderly people is basically about caring for a considerable number of old people (who may still be of minority of old people in the society) by the family, relatives as well as people of other informal networks. In other words, the majority are not a 'burden' and certainly not a public one.

The Myth of Family Break-up

Although it seems indisputable that the study of informal care can hardly be separated from the examination of the family, it is, however, controversial as regards to how and to what extent family does or does not provide care to elderly members. On one hand it is maintained by some observers that the traditional protective and caring functions of the family has

either been declining or diminishing due to the effects of urbanisation and industrialisation (Albrecht, 1953; Burgess, 1957; Ogburn & Nimkoff, 1955). Their argument was actually based on the Parsonian view of the modern family. From his comprehensive research on American family, Parsons maintained that small nuclear family type is the one which is compatible most with modern industrial society (Goode, 1964). Based on the Parsonian line of thought, Wong's (1975) study of Hong Kong Chinese families has come up with a similar conclusion. According to Wong, Chinese families in Hong Kong have not been able to escape from the impact of industrialisation and urbanisation, and the outcome was that most families tended to change from large extended to small nuclear. Following the line of thought of Parsonian sociology, Wong and the others are inclined to believe that nuclear family has become functional specific, which would result in a gradual decline of its caring and nurturing functions. Dr. Nelson Chow, the former chairman of the Hong Kong Council of Social Service, is one of the most influential persons in Hong Kong who echoes this view.

"As in other Asian countries, the Chinese family in Hong Kong remains the most fundamental unit in society. It continues to perform many of its traditional functions such as rearing of the young and caring for the old, although the extent of both has been lessened considerably by the process of modernisation and industrialisation" (Chow, 1983, p.584).

Whether modernisation and industrialisation have jointly weakened or even diminished the caring function of the family is a controversial issue. However, research conducted in recent years in Britain and United States showed that some misconceptions about the family needs to be carefully reconsidered. For example, Shanas (1979) examined the belief about alienation in the relationship between old people and their families and concluded that this assumption is false. According to Shanas (1979), although the proportion of old people living with children had dropped from about one third (36%) in 1957 to about one fifth (18%) in 1975, yet there has been an increase in the proportion of old people living within ten minutes distance of a child. In the year 1975, three of every four persons with children in the United States either lived in the same household as a child or within a half hours' travel, while this proportion in 1957 was only 59% (Shanas, 1968; 1979). Shanas argued that this pattern of residence reflect the genuine interest of both the elderly parents and the adult children, because it is possible to accommodate the need for independence and the need for privacy of both generations at the same time (Shanas, 1979).

Shanas' findings on the active status of the modern American family is certainly not an isolated one, because sociologists had already argued against the Parsonian view and had concluded that the modified extended family type could be equally compatible with the urban and industrial life (Aiken, 1964; Bennet &

Despres, 1960; Goode, 1970; Sussman, 1965). Based on the criticisms of the Parsonian view, Seelbach and Sauer (1977) suggested that it was not logical to expect only one single ideal family type which was functional in a highly diversified and differentiated society.

In Britain, Young and Willmott (1957) studied the family and kinship in East London in the 1950's and found that those couple who chose to live with parents were of the exceptions. On the other hand, statistics for Great Britain in 1978-1979 show that of all those aged 65 and over, about half (51%) still lived with their spouse and sometimes also with others who were likely to be children (Rositer and Wicks, 1982). Qureshi and Walker (1989) have pointed out that although the proportion of elderly people who lived with their children was significantly higher in Britain than in United States (40% versus 28%), joint households consisting of elderly people living with their children were increasingly rare. In their own recent research, based in Sheffield, Qureshi and Walker discovered that only about one fifth (20.4%) of the married elderly people lived with one or more children. The proportion of single, widowed, or divorced old people who lived with one or more children was found to be slightly higher, which was about one third (34.7%) (Qureshi and Walker, 1989). In addition, although the proportion of shared residence has decreased, the rate of proximate residence between elderly people and their children in Britain has also been

popular. In a survey of four urban areas in England, Mark Abrams found that about two fifth (38%) of the old people had relatives living in the same street or neighbourhood (Abrams, 1978). On the other hand, according to the General Household Survey of 1980, about one third of the elderly people living alone had relatives within five minutes' walk (Office of Population Censuses and Surveys, 1982; Willmott, 1986).

All the above research findings point to a common explanation : despite the fact that shared residence between elderly parents and adult children (whether married or not) has become increasingly rare , it by no means implies the breakup of the Western family. Rather this is, as mentioned both by Shanas and Walker, adopting the description of Rosenmayer and Kockies, "intimacy at a distance", a pattern of residence which the family and elderly people preferred (Rosenmayer and Kockeis, 1963; Shanas, 1979; Qureshi and Walker, 1989). So it is a myth that elderly people are alienated from their families because they are not living together.

Although living close to the children does not necessarily lead to more contact and interaction, research findings also show that interaction between old people and their children and other relatives has also been close. These findings together show that families in Britain as well as the United States are still intact, at least as far as interaction between old people

and their children and the production of care is concerned.

There is much evidence to support this. The Study Commission on the Family in Britain emphasized in their report on the changing value of the family that old people living alone is not the same as social isolation. Rather, many of those who lived alone led full active lives and had a great deal of contact with family members, neighbours and friends. This situation was true even among the very elderly group (Study Commission on the Family, 1982). On the other hand, a national study in England showed that the majority (78%) of old people living alone reported that they visited relatives. Another two fifths (39%) responded that they were visited by relatives several times in a week, while one fifth (19%) received visits at least once per week (Hunt, 1978). Apart from the above research findings, Young and Willmott's study in the London region showed that of those old people with children not living together, majority (72%) saw a child within a week (Young & Willmott, 1973). Comparable findings were gathered by Abrams in late 1970's where about two thirds (64%) of old people of the same household pattern saw a child at least once in a week (Abrams, 1978, 1979). Recent findings by Qureshi and Walker in Sheffield confirmed that the frequent contact between elderly people and their families had not declined, but rather on the contrary had seen an increase (Qureshi & Walker, 1989).

Research studies in the U.S. have also confirmed the British trend. Sussman found in the 1950's that the modal family of present-day urban America was still an extended family in which grandparents and often great-parents, though living in separate household, remain active participants in the primary kin network (Sussman, 1959). Moreover, Shanas' research showed that the proportion of older parents who saw at least one child during the week before they were interviewed for the research had remained stable over about twenty years, and the percentage was respectively 83% in 1957 and 77% in 1975. Among elderly people who lived alone, the same research showed that about half had seen at least one child either on the day they were interviewed or the day before. Only about one out of ten elderly people in the United States had not seen at least one of their children for a month or more, and this ratio, according to Shanas, has been quite stable over the twenty years since 1979 (Shanas, 1979).

Apart from the data which showed frequent contact between old people and their children, research in both sides of the Atlantic also showed that elderly people in Britain and United States maintained contacts with other relatives such as their siblings (Shanas, Townsend, & Wedderburn, 1968).

The question as to whether the western family is breaking up has been answered by the research findings quoted above. Despite the fact that fewer elderly parents live with their adult

children, they tend to live close to at least one of them, who is more likely to be a daughter, with whom they maintain close contact. In other words, kinship ties do not seem to have loosened due to the change of residence pattern. Rather to the contrary, research studies have also shown that the family (particularly its female members) has remained the most fundamental unit in providing care for needy elderly people, especially when the old person is widowed (Hunt, 1978; Abrams, 1978; Qureshi and Walker, 1989). In addition, Bayley and his research team found in Dinnington that elderly people in most need of care received twice as many visits a week from relatives as other less needy people (Seyd et al., 1984; Bayley et al., 1990). The amount of kinship contact within the family as well as the amount of care given by relatives to the elderly show that the family in western society are still active and effective. In the following sections I shall discuss the structural as well as relationship features of Chinese family and old people as seen in London and Hong Kong.

Are Chinese Old People Abandoned ?

As pointed out in the previous chapter, it has long been noted that modern Chinese families as seen in Hong Kong and other modern industrialised Chinese communities (such as Singapore and Taiwan) have changed from large and extended type to become small and nuclear. Based on his study of Chinese familism as seen in

Hong Kong, Lau (1981) even argued that the affective relationship between Chinese family members has been replaced by a utilitarianistic relationship. Because of the prevalence of small nuclear family unit, there is a further assumption that more old people are being abandoned by their families, and the good tradition of caring for the sick and the old which characterised the extended Chinese family has largely faded away. In the following section, I shall discuss the residential pattern of Chinese old people and see whether they have been abandoned by their families in London as well as in Hong Kong.

Residential Pattern of Chinese Old People

As I pointed out in Chapter one, it was normal for Chinese people to live with one of their children when they became old. This was not the kind of residential arrangement where old people moved into the residence of their children for accommodation, care and support, but rather one of the children stayed behind even after they got married, and shared the residence of their parents. According to the patriarchal tradition of Chinese familism, there was no question about whether it was right and appropriate for the family head and his spouse to stay with their son. In cases where the patriarch was absent, it was also normal for the old mother to stay with the son, despite the fact that the son would have become the family head who kept the family purse. This practice is not difficult to understand, because in

an agrarian society where the family was an economic unit and where filial piety had been highly emphasized, living with one's elderly parents would become the most convenient context of providing nourishment and respect. That is why in the traditional Chinese family, old people had expected and were expected to live with one of their children who was usually the eldest son.

To what extent has modernisation and westernisation eroded this traditional practice ? As observed by Phillips (1988), there is not a wholesale acceptance of all that Western modernisation implies. Instead, Chinese people seem to have retained pragmatically some traditional practices which are useful and effective in present day circumstances. Lee (1980) who researched into the perception of uses of Chinese medicine among Chinese people in Hong Kong, has confirmed this pragmatic practice. In addition, Phillips (1988) also observed considerable persistence of traditional Chinese values such as the belief in family solidarity and the high value put on the family group. All these research findings and observations revealed that Chinese people in Hong Kong have selectively retained traditional Chinese values and practices, although westernisation has had some impact. What then are the impacts of modernisation on the traditional accommodation arrangement of Chinese old people? To begin, I shall examine the research findings in Hong Kong.

Living Arrangement in Hong Kong

First of all, Michell (1976) studied urban life in Hong Kong and found that about three quarters (73%) of the older "parents couple" for which both spouses were still alive lived with their children. Similarly, three quarters (75%) of the widows lived with one of their children who was most often a married son. More recent studies in Hong Kong have come up with similar findings : Chinese old people, whether they were widowed or not, tended to live with their children. Evidence for this was provided by Law (1984) in his survey on the social service needs of elderly people in Hong Kong. In this study, Law showed that about three quarters (73.2%) of elderly respondents were living with at least one of their children, of whom more than half were living with married children and their family members. Moreover, it was also found in the same study that only a very small proportion of elderly people (6.2%) lived alone with their spouse, while another one tenth (9.6%) lived alone. Law's study was a territory-wide sample. However, some locally based studies conducted in different parts of Hong Kong have shown some regional variations. For example, a study conducted by SOCO on old people's need in one of the oldest urban resettlement housing estate in Tse Wan Shan showed that only about half (53.1%) of the elderly people in that district lived with their children, while about another one tenth (10%) lived with their spouse (SOCO et

al., 1989). The proportion of old people living with their children in Tse Wan Shan district is significantly lower than the one found by the territory-wide study of Law. However, another study conducted by Hong Kong University in the Wanchai area, which is an old residential area on the Hong Kong island, showed that the great majority (90.8%) of the old people interviewed lived either with their spouse or with at least one of their children (HKU, 1984). If the average percentage of old people living only with a spouse is deducted, the findings indicate that there were about three quarters of old people in that district living with at least one of their children. This finding in Wanchai matches well with the general profile in the territory-wide study by Law. Moreover, my study in Hong Kong similarly showed that 65% of the elderly respondents lived with at least one of their children. How can we explain the variation between the findings of the Tse Wan Shan study and the other studies ?

First, this kind of regional variation is a result of the shortsighted public housing policy in Hong Kong which brought about variations in housing standards between different districts. Tse Wan Shan Estate is one of the oldest type of public resettlement estates which was built in the 1950's and early 1960's. According to the housing standards at that time, each household was given a small cubicle at only about 100 square feet for the whole family to live in. When the children grew up

and had established their own family, the space of the cubicle was hardly enough to allow the new family to live together. Although in practice many newly married couples still lived in the small public resettlement cubicle because they could not afford to live independently, the housing conditions clearly did not encourage the adult children to stay with the parents due to the limitation of space. This is particularly true after the new couples gave birth to their own children and thus aggravated the problem of overcrowding. However, in other districts where public housing estates were built later in the 1970's and 1980's, housing conditions had been improved and, as a consequence, adult married children were more inclined to stay behind with their parents. This situation was more prevalent among the married children who were economically not well-off enough to afford private accommodation.

Secondly, public housing policy has been quite inconsistent over the past years. During the time when the Tse Wan Shan Estate was built, children's names were automatically removed from the official registration list of qualified residents once they got married. This was a measure to curb public housing demand for bigger housing cubicles due to the increased number of people in the household, so as to reduce the demand for public housing provision. In a time when the government only supplied public housing at a subsistence level, it is not difficult to understand why the government used such measure to discourage the

expression of needs. This policy was implemented until the beginning of the 1980's when housing standards in terms of space and other amenities were improved. One married child was allowed to stay behind in the parents' cubicle, and if another also stayed, it would be often tolerated. This is precisely why in older resettlement estates such as Tse Wan Shan more old people were left behind to live on their own, while in some other parts of Hong Kong more old people stayed with their children even after they established their own family.

Nevertheless, taking the general profile as well as the particular situation of other districts in Hong Kong into consideration, it becomes quite clear that majority of the Chinese elderly people are still living with their adult children, although a minority (about one fourth) of the old people have alternative accommodation arrangements. The traditional practice of living with adult children seems to have been largely preserved rather than to have been eroded as had been commonly believed, despite there being some changes in the accommodation arrangement among Chinese old people. Moreover, the general pattern of accommodation for old people, as seen in the case of Hong Kong, is to live with one of the children who is likely to be married and more likely to be a son than a daughter. These research findings argue against the common assumption that Chinese families have undergone a fundamental change in their structure. Instead, despite the rise in the number of nuclear

families, most Chinese old people in Hong Kong still reside with their own children and family. On top of this, Michell's (1976) findings further showed that this pattern of accommodation arrangement was particularly prevalent among older widows in Hong Kong.

Living Arrangements in London

Compared to the situation of the Chinese old people in Hong Kong, do those in Britain show a different accommodation pattern? To what extent do they still preserve their traditional practice in a different social and cultural setting? Research findings in the London study show that about two out of three (67.4%) Chinese old people are living with at least one of their children who may be married and have their own family, whereas only about one fifth (22.6%) lived either with their spouse without children or simply lived alone. Moreover, findings in both London and Hong Kong show that the proportion of old people who lived with adult children and their family is very similar. What is more interesting to note is that the figures for Hong Kong and London are also very similarly to that of the urban Chinese family in Mainland China where about three quarters (72%) of old people lived with their children (Davis-Friedmann, 1979). The close similarity among the three Chinese communities signifies that the simple 'westernisation thesis' does not seem to explain the true picture : most Chinese old people are living with their

families. It can be argued, therefore, that westernisation has not washed away the traditional Chinese accommodation practice.

The preservation of Traditional Accommodation Arrangement

What are the factors which caused the preservation of this familial practice? The normative expectation of old people to live with their children, particularly their sons, is still prevalent in Hong Kong as well as in the Chinese community in London. According to Michell (1976) in his study of family life in urban Hong Kong, the traditional expectations regarding the care of older parents were quite clear. These include the expectation for sons rather than daughters to assume the responsibility to house their elderly parents. In another study on the changing life style of elderly in low income family, Chow and Kwan (1984) confirmed that these traditional expectations were still prevalent, although they were only operative to a lesser extent.

In the London study, the findings which reflected the perspective of the old people, have shown a similar picture. The great majority (80.4%) of the Chinese old people interviewed in London agreed that children should take care of their elderly parents, and nearly three quarters (70%) agreed that children should follow the traditional filial practices. On the other hand, only slightly more than one third (34.8%) of the old people

agreed that they were burdens on their families. Although it is noticeable that the expectation of old people in the demand of filial practice may often be higher than that of their adult children, it needs to be noted also that children are also faced with societal as well as normative pressure. Cases in the London study show that sons and daughters who live with their elderly parent(s) often strongly reject any assistance to help their parents to live separately. The researcher himself had, on many home visits, been received in a hostile fashion by the adult children because he was mistaken for the Chinese community worker who was helping the old people to find separate accommodation. The children expressed their views that separating their elderly parent(s) was normatively wrong, and that moving out their parent would symbolise their own failure and they were not prepared to be so labelled. These findings in London did not imply that the two generations necessarily enjoyed living together, yet it showed clearly that the normative expectation and the traditional filial practice in terms of housing one's elderly parents are still effective, albeit that to a different degree between the two generations. Indeed, the fact that this pattern of the accommodation of old people prevails simultaneously in three Chinese communities - Hong Kong, London, and China - where social conditions are so different, reflects the considerable extent to which normative expectation is still playing an important role in shaping the accommodation pattern of Chinese old people.

In addition to normative belief, living with one's parents when they are old can be an expression of affection and reciprocity. Although more and more cases show that living together does not automatically imply dependency in the part of the old people, nor does it necessarily imply the availability of care, children do live together with their elderly parents so as to return the reciprocity of nourishment. The following conversation from an interview with an older person showed this kind of return :

Interviewer : Who are you living with ?

Old People : I am now living with my youngest son, his wife and his children. Now this is my youngest son, he is off today (Introduced interviewer to her son). He is usually off on Tuesday, but he needs to work in the rest of the week.

Interviewer : Have you ever thought about moving out and to live in somewhere else ?

Old People : No. (Answered in a definite way). Who shall I stay with if not the son? He is my son.

The Son : My mother has brought me up. Now she is old. I have a responsibility in nourishing her. If I asked my mother to live alone, I would be very guilty.

However, while acknowledging the prevalence and the importance of normative expectations in preserving the accommodation pattern of Chinese old people, it needs to be

pointed out that to explain the preservation of the accommodation pattern of Chinese old people living in both Hong Kong and in London purely as a cultural or normative practice may not be sufficient, because it overlooks the social and economic factors underpinning and reproducing this traditional living arrangement among old people.

In the case of Hong Kong, I have pointed out in the previous chapter how social policy in general and social security policy in particular reinforced the financial relationship between Chinese old people and their children. As far as accommodation arrangements are concerned, the traditional practice of living with children (sons in particular) in the Chinese community in Hong Kong is reinforced by social policy in housing as well as in wealth distribution.

First, due to the serious shortage of land, private housing in Hong Kong has been extremely expensive. The average market price for one square foot in a residential apartment in the urban area cost around HK\$1500 in 1988, and this figure has been going up steadily. The private housing rent at the market rate is about one percent of the sale price, which is about HK\$15 per square foot per month. Taking into account the financial straits of Chinese old people in Hong Kong, affording independent accommodation in the private market has become extremely difficult, if not impossible, for old people. This is a

practical reason which discourages old people from living on their own in Hong Kong. On the other hand, there is also a practical need for married children to stay with their elderly parents, partly because the younger generation cannot afford separate accommodation. Rosen (1978) observed that this difficulty was particularly prevalent among children who were just married and those lower class family who needed 'residential assistance from their elderly parents. So the practical difficulty may create the need for accommodation from both sides.

Secondly, if those old people who live on their own in the private sector, the majority live in extremely poor housing conditions such as cage houses (which are very small bed spaces surrounded by iron bars) and other kinds of shared accommodation with other people to whom they are not related. Such poor housing conditions deter old people from living separately from their adult children and their family.

Thirdly, public housing policy in the last twenty years in Hong Kong discouraged old people from living separately from their families, and this was particularly true of those old people who were widowed. Until recently one- person households were not eligible for public housing.

Fourthly, residential institutions, including old age homes and elderly hostels run by the government only provide very

limited number of places for the elderly people. According to the Five Year Plan of the Social Welfare Department, the demand for care and attention homes in 1985 was 2491 while the provision was only 1020, the shortfall was about 1.5 times (144%) of the provision. In 1989, the shortfall for places in the care and attention homes for elderly people was even more serious. According to the Social Welfare Five Year Plan Review of 1989, there was a demand of more than five thousand places in the care and attention homes, while the provision was only 1860 places, which showed a shortfall of about 200% (Social Welfare Department, 1989). As for homes for the aged, the demand in 1985 was estimated to be 6228 places, but the government only provided 4407 places, showing again a shortfall of 1821 places, which was 41% of the provision (Social Welfare Department, 1985). Although the government has increased the places of aged homes by around 7.5% per year, there was still a shortfall of 20% comparing to the provision (Social Welfare Department, 1989). Although in addition to the above residential provision the government has introduced a sheltered housing programme for old people by which about 600 places are provided each year, the total residential places provided by the government are still extremely limited. Only 2.4 residential places are provided per hundred old people aged 65 and above (Hong Kong Government Census Department, 1986, Social Welfare Department, 1985, 1989). So the shortage of residential provision for old people also added to the preservation of traditional living arrangements for the old

people in Hong Kong.

As for of the Chinese old people in London, the shortage of suitable housing provision has also been a problem, although not as serious as in Hong Kong. Most Chinese old people who lived apart from their children would like to live close to them. But this was not always possible, because the availability of council housing and other housing provisions may not always match with where their children lived and worked. Other old people who did not enjoy living with their adult children were seriously discouraged from moving out due to problems mainly caused by their language difficulty. Most Chinese old people who immigrated to Britain were originally from the New Territories of Hong Kong (which was predominantly a rural area in the 1950's and 1960's) and were not properly educated. English is a language which they do not read or speak, and many do not even read Chinese. Their incompetence in English creates a sense of insecurity among Chinese old people and thus a reluctance to live apart from their children.

To conclude this section, the living arrangements of Chinese old people as found in London and in Hong Kong are quite similar. Contrary to the expectation of policy makers, the majority (about 68% -75%) of the Chinese old people in both places are still living with their family, specifically with their adult children and their grandchildren. While there are still some

(about 20% after deducting the single old people) old people who are found either living alone or living with non-relatives, it appears quite clear that the majority are living with children, and that the traditional residential arrangement of Chinese old people living together with their children has been preserved rather than eroded. The normative expectation concerning the living arrangements of elderly parents is still effective, although old people's expectation varies from that of their children. The social and economic factors which strengthened this practice are different in London and Hong Kong, but the consequences are similar. Nonetheless, the most important question to emerge from the above discussion is : what are the positive and negative implications of living together as far as informal care of the Chinese old people is concerned ? I shall discuss this question in the following section.

Residential Arrangements and Informal Care

Although I have shown above that the majority of the Chinese elderly people still live with their adult children, this general profile of living arrangement does not provide sufficient information to explain the burden it lays on the familial relationship and how it affects the production of care by family members. It is certainly incorrect to think that living together will guarantee automatic provision of care : it is equally wrong to suggest that living together would necessarily create a

harmonious familial relationship.

In a study about family care among low income family in Hong Kong, Chow (1984, 1987) suggested that informal care of old people was mainly provided by the family members, and specifically the ones who lived with the old people. Moreover, whether care was given was correlated with the quality of the relationship between the old people and the family members who lived together. While the second suggestion has widely been accepted as valid, the first one does deserve further examination. Indeed, when old people live with their adult children and grandchildren, they do not only physically live together under the same roof, but they also interact intensively between one another. So in order to examine how living together affects familial relationships and informal care, the quality of the family interaction has to be examined. Furthermore, old people have always been included as family member of the adult child who live together. Therefore this family has always been the one which is socially expected to shoulder the primary responsibility of care. So with whom the elderly person lives becomes one of the most important topics to examine.

Birth Order of Children and Living Arrangement ?

Traditionally there were two important factors which contributed to the living arrangement of Chinese old people. The

first was the gender of the children, and the second was their seniority (birth order). Other conditions such as the economic ability of the children were also important, but were only considered when these two primary conditions could not be fulfilled. Based on the study in London and Hong Kong, I shall examine whether these two attributes are still effective today. I shall begin with the factor of seniority of children.

Michell's (1976) study of family life in urban Hong Kong showed that the Chinese tradition which required the eldest sons to shoulder the primary responsibility of housing their elderly parents has changed. To show this, Michell (1976) considered sons living in Hong Kong who also have a brother or sister living here and who, in addition, have a parent living with either themselves or with one of their brothers and sisters. The findings showed that more youngest sons (63%) were found to house their parents than the eldest ones (43%). Although this study has not been able to establish a new trend, yet it showed that seniority of children cannot predict which child will assume the residential responsibility for their parents.

What about Chinese old people in London? Among the old people who lived with their children, one third (33.8%) of them lived with their eldest child. Then, about one tenth (10.9%) lived with the second child, while about one fifth (21.7%) lived with their third child who was often the youngest. Unlike the

situation of Hong Kong where more youngest children tend to live together with their parents, more Chinese old people in London tend to live with their eldest child. However, the findings in London also showed that the eldest child is no longer predominantly the one who complies with the traditional expectation of housing their elderly parents. Rather, the findings showed that the responsibility has been divided more evenly among different siblings.

How is this division carried out among the children? In those few cases where the old people were economically secure and independent, they often had more say in the decision making process. But usually where the old people were not economically independent, this arrangement became a compromise after a process of negotiation between siblings. Rosen (1978) showed that the availability of adequate accommodation in a place like Hong Kong is an important consideration, but this factor was not decisive. Both Michell's study (1979) in Hong Kong and my own study in London and Hong Kong showed that space was not a determining factor. In the case of Hong Kong, Michell argued that the economic ability of the child was one of the most important factors, and the other was the relationship between the old people and the child who lived together.

On the other hand, the London study showed that the picture is more complex. Several more factors have to be taken into

account. First, the financial condition of the siblings; secondly, the need for the old people's contribution in the family or in the catering business; and thirdly, reciprocal contribution between adult children and the old people. How are these factors translated into practice? When the Chinese old people first arrived in Britain, they tended to live with the child who was economically capable of housing them. If this family needed the help of the old people, for example, in baby-sitting or keeping an eye on the grandchildren, they would stay on in this child's family. But when the grandchildren in this family had all grown up and another child's family needed their contribution, the old people would move to stay with that family. The findings in London show that as many as three fifth (61%) of the old people who lived with their children had offered or were still offering household support (particularly baby-sitting and keeping an eye on grandchildren) to their children's family. Of course this analysis is not to suggest a utilitarian view of the residential arrangement, but only that while traditional practices (such as following one's eldest son) are no longer predominant, reciprocal contribution has become one of the important considerations in the living arrangement of Chinese old people. In the following section, I shall discuss the extent to which the gender of the children affects the living arrangements of old people, and I shall also examine the implications it is likely to bring to the care of Chinese old people.

Gender and Living Arrangement

In Hong Kong, Michell (1976) showed that forty percent of the women who housed one of their own parents had a brother living in Hong Kong who could fulfil this traditional male responsibility. In addition, more than half (57%) of the women who housed both parents had a brother in Hong Kong. These findings led to the conclusion that many older parents in urban Hong Kong lived with one of their married daughters rather than with one of their sons, and that the exclusive male responsibility has been eroded. This has turned out to be a controversial conclusion because it was one which subsequent research conducted specifically on the needs of old people could not confirm. First, the study of the needs of elderly people by the Hong Kong Council of Social Service (1978) two years after Michell's study showed that majority (59%) of the old people in Hong Kong lived with their sons, while only about one third (33.2%) lived with their daughters. Secondly, the study by Law in Wanchai (1983) had come up with similar findings, although the proportion of those old people who lived with daughters was slightly greater. According to this study, over half (55.1%) of the old people lived with their sons, while about two fifths (41.5%) lived with their daughters. However, a subsequent study conducted by Hong Kong University (1984) found a slightly lower proportion of old people who lived with daughters (38.6%), despite the fact that the proportion of those who lived with sons

(51.1%) had dropped slightly. The reason for this was that slightly more old people were living on their own with their spouse.

It should be noted that these three studies were conducted from the late seventies to the middle of the eighties, and their findings carried considerable consistency. Despite the fact that all these research findings consisted of an overlapping area in which old people lived with sons and daughters at the same time, the general profile looked rather clear in Hong Kong : more Chinese old people are still living with their sons than with their daughters. However, sons no longer take exclusive responsibility in housing their elderly parents. Daughters appeared to have shared some of the responsibilities of their brothers in this respect. This living arrangement has also been confirmed by my study in Hong Kong which showed that among the old people who lived with their children, 64% lived with sons and 36% lived either with daughters or with sons and daughters together.

What then is the situation among the Chinese elderly people in Britain? The London study shows that among those Chinese old people who lived with their adult children, about two thirds (65%) of them lived with their son, while slightly more than one third (35%) lived with their daughters. When compared to the figures shown in the Hong Kong studies, it appears that the

general profile in the two places is rather similar, despite the fact that a slightly larger proportion of Chinese old people in Britain lived with their sons than those who were in Hong Kong. In other words, in the Chinese contexts of London and Hong Kong, sons are still playing an important role in living with their elderly parents. This included a majority of those sons who were the main breadwinner of the family including the old people, and also, exceptionally, some who shared the residence which belonged to their elderly parents. As Chinese old people in Hong Kong and Britain were mainly those first generation migrants from the nearby provinces of China before or soon after the second world war, living with sons had all along been economically more practical and normatively more acceptable than with daughters. This can be evidenced by the fact that the labour participation rate as well as the economic activity of men has always been higher than that of women (Hong Kong Government, Census and Statistics Department, 1961, 1971, 1981, 1986).

However, what is equally true, looking at the findings in the two places, is that sons are not shouldering exclusive responsibility in taking care of their parents in some aspects which, traditionally, were their sole responsibility. Housing is one of the typical examples and nourishment (financial maintenance) is another. Daughters have shared some of these traditional responsibilities of sons in line with the improvement of their own economic status. Several important questions have

emerged from this analysis: in what area does this redistribution of caring responsibility occur ? Does it imply that that there is a complete re-arrangement and redistribution of caring responsibilities so that not only the traditional men's roles are shared with women, but also that the traditional caring tasks performed by women (such as tending) are also shared by men ? What are the implications of this change of traditional role and responsibility as far as the care of Chinese old people is concerned? I shall deal with the first two questions in the next chapter, but before that I shall discuss the implication of this redistribution of responsibility in the following section.

Living Together : A Symbol of a Better Relationship ?

As pointed out above, various research studies in Britain and the United States showed that old people living apart from their adult children means neither the breaking-up of the family, nor a poor family relationship. In the Chinese context, on the other hand, does living together necessarily mean that it is a result of a harmonious familial relationship? Or does it reveal that there are certain blocks and barriers which would be likely to arouse family tension ?

Chow (1987) interviewed the family members who took care of the old people and found that two thirds (68%) claimed that they had good relationship with the elderly parent(s) who lived

together. In addition, about one third described their relationship as fair, while only a very small minority (2%) admitted their relationship was poor. Although the majority of the family members gave a positive feedback to the question of familial relationship, this finding should be viewed with reservation. As Chow states, in a Chinese society where the practice of filial piety is given almost the highest importance, the open confession of family disharmony not only involves a loss of face, but, more importantly, brings social and moral stigma. Under this pressure, the 'fair' relationship claimed by family members may well be unsatisfactory. In this light, it can be argued that the general profile of the relationship between old people and their family who live together is largely satisfactory. However, there is also a significant proportion of old people who may not have a satisfactory relationship with their family members, particularly their children and in-laws with whom they live.

To what extent is this general profile of Hong Kong comparable to that of Chinese old people in Britain? First of all, the London study shows the opinions of the old people rather than those of the children. Nevertheless, despite the fact that old people in London are not socially and morally expected to practice filial piety to their children, direct inquiries about their assessment of familial relationship would also be cautious, due to the fear of the loss of face and to avoid family tension.

Therefore, although the subjective assessment of relationships given by the old people was generally positive, some further findings in the London study have contributed to a deeper analysis of the relationships of the Chinese old people.

The findings of the London study showed that out of the total number of adult children who lived in Britain (n=120), around one fifth (22.5% n=27) saw their parents every day. Another one sixth (15.8% n=19) had face-to-face contact with their parents from weekly to several times a week. About one in four (23.4%) visited their elderly parents at least monthly, and the rest had very rare or no contact. The findings showed that majority of the children had not deserted their parents, but instead, at least one adult child of each Chinese old people had face-to-face contact with them in the previous month, of which about two fifths (38.3%) had had frequent contacts with their elderly parents.

However, daily contacts made by children may not be indicative of the position of the Chinese old people in London. Taking into account that about two thirds (68% n=27) of the old people were actually living with their children, frequent face-to-face contacts may not imply intimacy, but can just be a result of co-residence. Findings in the London study showed that a great majority (87%) of the old people who saw their children everyday were those who lived with them. Since the sons and the

in-laws were usually engaged in the restaurant and takeaway business where exceptionally long working hours were required (usually from noon to midnight), the face-to-face contacts with the children could easily become a routine rather than a symbol to show, and a means to promote, familial intimacy :

"I live together with my son, my daughter-in-law and my grandchildren. I do see them everyday. But he is always in such hurry that we really have not much chance to talk to each other. He works in a Chinese restaurant in Soho which closed at midnight. After tidying up the place and taking a late night dinner which they usually do after work in the restaurant, he returns home at about 1:30 a.m. and I would have been asleep. Although he starts work again at noon time, he has to return to the restaurant at about eleven in the morning and get everything prepared. He gets up at about 9:30a.m. which actually does not give him much time to spend with his family. We don't really have much time to talk to each other unless during his leave." (Mother, aged 76)

On the other hand, while living together creates opportunities for daily face to face contact, some other social gatherings in which both the family and the old people participate are not created by co-residence. These include birthday celebration of the old people and the gatherings during some important Chinese festivals. These are the important circumstances in which family members gather together. The London study showed that two fifths (40%) of the Chinese old people were given birthday celebrations by their sons or

daughters together with other family members, and more than half (54.3%) celebrated with their family during important Chinese festivals. Apart from these, old people were sometimes taken out to Chinese restaurants for Chinese dinner and 'dim sum' (Chinese snacks) by their family on Sundays (or the day which the takeaway shops did not open) where other children who did not live with them might also join. But these occasions are quite rare due primarily to the working commitment of the children.

Nonetheless, despite the frequency of face-to-face contacts between Chinese old people and their families who lived together, about half (49.9%) of the Chinese old people claimed that they were either often lonely or were lonely most of the time. Within this group of old people who felt lonely, the great majority (91.3%) were left alone at home for at least six to nine hours a day, while more than half (52.2%) had no one to talk to, even the grandchildren were around. Furthermore, ninety percent did not have someone with whom they could go out regularly, and two thirds (65.2%) had received no visits at all for the past year.

So despite the fact that the general profile of the London Chinese old people looks similar to that of their Hong Kong counterparts, it is important to note that certain difficulties pertain particularly to this group of old people in London. These difficulties are not normative ones, but are largely of a social and economic nature caused primarily by the concentration

of the Chinese population in a very restricted social and economic circle (restaurant business) as well as by the social handicap of Chinese old people in an alien and non-Chinese speaking environment.

Living with one's family is not a guarantee of care. It can equally cause relationship tension. That is why relationships are an aspect which both old people and children, particularly in-laws, handle very cautiously. The absence of direct reciprocity between in-laws and old people, as seen in the case of financial support, is a feature of co-residence. As member of the child's family, the old person is to participate in the family affairs so as to avoid the feeling of isolation, yet the scope and depth of participation is a delicate issue. Both in Hong Kong and Britain, most old people participated in family affairs by helping in household chores and baby-sitting. However, the London study showed that only one tenth (10.9%) of the old people had helped or were still helping in the restaurant business (particularly in the take-aways). These findings showed that Chinese old people only actively participated in a certain sphere within the domestic circle where they were allowed to find their own roles and make their own contributions:

The above analysis not only showed that the majority of the old people were not totally dependent on their family, but it also showed that they lived with their family where they also

made relevant and reciprocal contribution in an acceptable sphere. This may be a way for the old people to reduce their sense of dependency and uselessness. This is particularly true when traditional and normative expectations, such as filial piety, cannot guarantee respect and dignity even within the sphere of the family. Participating in family affairs and making contributions to the life and economy of the family are usually the ways to achieve this end. However, old people's participation in family affairs has always been a delicate issue. Michell (1976) observed that old people who got along with their children's family well were able to balance their host-guest relationship. In other words, old people have to observe certain familial norms, otherwise, their participation would be received as trespassing and cause relationship tension. This issue of trespassing prevails generally in the cases of co-residence, but it is more a problem for old people living with daughters and sons-in-law than with sons and daughters-in-law. The reason is mainly related to the traditional expectation of the status of married daughters who were commonly regarded as members of their husbands' family.

What then are the private and prohibited area of family life? In the London study, Chinese old people had exceptionally low participation in such family affairs as children's marriage (4.3%), restaurant business (4.3%), as well as investment (4.3%). As regards to the education of grandchildren, old people also

appeared to have very little say. Only one tenth (10.9%) of old people were consulted and had participated in the discussion and decision making. About one out of six (15.2%) old people had been consulted on family issues such as where to spend leisure and what to do during holidays. This was the aspect which old people had the highest participation, besides helping in family chores. As discussed above, the consideration of trespassing by old people within the family is an issue handled very carefully by the old people. This is evidenced by the finding that majority of Chinese old people in London (75% -90%) did not expect to alter the present situation in many aspects of their family life. Rather they would prefer to preserve the status quo so that the equilibrium of familial relationship would not be upset.

To conclude, it is obvious that Chinese old people can hardly rely on their traditional status to secure for themselves a place in the children's family. Rather more importantly both parties often reciprocate with each other cautiously. Old people's contribution to household chores has been found to be the most secure and acceptable means, not only in terms of properly locating themselves, but also for the possible continuation and reproduction of reciprocity in the family. In the next chapter, I shall discuss the division of caring responsibility for Chinese elderly people in Hong Kong and in London.

CHAPTER SEVEN

CHINESE OLD PEOPLE AND THE DIVISION OF CARING RESPONSIBILITY IN THE FAMILY

In western societies such as Britain and the United States, caring for old people has been a primary task of the family (Townsend, 1965; Shanas et al., 1968). As pointed out by Walker (1987) in his discussion about the caring capacity of the community, the family has been the primary source of care and support for the elderly, the mentally handicapped as well as the physically handicapped. Accordingly, the vast bulk of care is not provided publicly by the state but privately by the family.

Along similar lines, Willmott (1986) put together the research findings of Rossiter and Wicks (1982) and those of Hunt (1978) and concluded that most help was given by people from the same household (a spouse or a relative) or by relatives living nearby. This caring function of the family is also confirmed by research studies conducted in the United States. For example, Shanas (1979, 1979a) reported that among the old people who were bedfast or housebound, the majority were taken care of by their family members with only some minor assistance from public health nurses and other home aids. Similar conclusion has also been documented by other researchers in the U.S. such as Cantor (1975), Horowitz (1985), Ward (1985), as well as Cicirelli (1983).

Indeed, the myth of the diminishing caring function of the family in western society has been reconsidered and has found to be wanting. Furthermore, more indepth studies in different aspects of family care have continuously been conducted in Britain as well as in the United States. One of the most notable areas which attracts popular attention has been the division of caring responsibility within the family. The questions being asked are : how are jobs being divided and who are the ones who performed the major tending or personal care for the old people? These questions have been partly answered by studies on family care and have been documented widely in the related literature. The prominent examples include the postal survey by the Equal Opportunities Commission (1980) where it was found that the number of female carers were three times higher than that of men. This finding of gender inequality coincides with other research by Finch and Groves (1980), Walker (1981), Parker (1985) as well as Land (1978) and others.

In addition to the fact that women had actually shouldered the major responsibility for caring old people, it was further pointed out that they had born the main burden of guilt and worry which arose partly out of the love and affection involved in the caring relationship, and also from the social expectation of family life and gender roles (Graham, 1983; Ungerson, 1983; Peace, 1986; Dalley, 1988). While acknowledging the gender division of labour in caring, it is noted that this burden on

women is in fact increasing in the context of Britain. As documented in Qureshi and Walker (1986), the percentage of women aged 16-59 who had a caring responsibility for old people had grown substantially from 5% to 13% over roughly 15 years (Hunt, 1968; Martin and Roberts, 1984, quoted by Qureshi and Walker, 1986) In their research Qureshi and Walker (1989) found that even those helping tasks where men had a traditional role to play (such as heavy shopping), the ratio of female to male non-spouse relatives giving assistance was still 4:1. Gender inequality in the division of caring responsibility was even more obvious in other stereotyped activities such as laundry and household chores where they were generally expected to be women's work. This gender division of care has similarly been found by various studies in the United States (Shanas, 1981; Horowitz, 1984). In a study of the difference of role performance between sons and daughters in caring for elderly parents, Horowitz (1984) found that not only daughters did help more in some traditional female activities, they also devoted considerably more time than sons to the care of their older parents.

As a matter of fact, the division of care in the family is a subject which has been better studied and clarified in the western world than in Chinese societies. Despite the fact that there are misunderstandings about the role and function of Chinese family on which I have commented in the previous chapters, studies which focused on the care of Chinese old people

in Hong Kong have only been rare and superficial. The most prominent studies on this topic were conducted by Chow (1983, 1987, 1990) who concluded that the Chinese family, though nuclear in its structure, remained to be the main source of help for old people. On top of this, it was also found that most help for old people was given by family members living together. As far as the division of care is concerned, indepth research has been rare. In a study of the welfare needs of old people which touched indirectly on the subject of care, the findings showed that most help in household chores was given by private source, including the spouse (34%), children (22.4%), children-in-law (22.4%) as well as friends (Hong Kong University, 1982; Chow, 1983). However, the question of the gender division of care has not been touched on nor answered. This partly reflects the fact that gender inequality is a less contentious issue in the Chinese society where the fundamental assumptions about the nature of family life, about the role of the family and of different genders in the family and in the society are largely taken for granted.

However, in a very recent study of family life in a new town in Hong Kong which drew on some of the previously mentioned western research, the gender division of labour has become a focal concern of the research. In this study, Chiu (1989) found that about one in four (25.8%) of the households being interviewed had a member to be taken care of, and the gender

division of labour in caring activities was clear. The ratio of women taking up the caring tasks in the family was found to be 3 times higher than that of men, and vast majority (75.4%) of the women were responsible for the household chores. What is important to note is that this stereotyping of gender roles in Hong Kong appeared to have been rooted in different social classes. The findings showed that 81% of women in the low income group were reported to be the main responsible person who took charge of the household chores, while in the high income group 68% claim that they were in that position at home (Chiu, 1989). Despite the fact that the study by Chiu (1989) has given some hint about the gender division of care in the family, many more questions about the division of care for Chinese old people have yet to be answered.

In this chapter, the discussion focuses on the caring capacity of the Chinese family. The findings in the Chinese communities of London and Hong Kong support the argument that the vertically extended Chinese families in the two places are active in providing the major bulk of care for their elderly members. However, the traditional ideal Chinese family, which is the horizontally extended family, has only played a minimal role in the provision of care. As far as the division of caring responsibilities in the Chinese family is concerned, the argument that family care is equal to care by the daughters does not strictly apply in the Chinese context. In the circumstances

of the London Chinese, the role of the grandchildren has emerged, and they have become the main carers in carrying out some of the specific helping tasks. In addition to the examination of caring capacity, a pattern of care as shown in the two Chinese communities in London and Hong Kong is also established in this chapter. It is argued that the caring capacity as well as the caring pattern of the Chinese family for old people are not just a natural heritage of the Chinese traditions. They are, rather, consequences of the production of social policy and the changes of a series of social and economic conditions of women and of the old people. As a starting point of the discussion, I shall highlight briefly the needs for care of Chinese old people in the two places.

Health, Social Disadvantages and the Need for Care

Generally speaking, functional incapacity has always been a result of advancing age. According to Townsend (1979) in his national study of poverty, the rate of those who were appreciably or severely incapacitated fluctuated around 1 percent up to the forties and then rose for both sexes in the fifties and more sharply for women than men in the sixties and subsequently. Moreover, the findings showed that over a fifth of men and a quarter of women at the age of early seventies were appreciably or severely incapacitated. Indeed, the deterioration of capacity in old age has been one of the most common but important

basis which creates the need for care.

In relation to this aspect, the findings of this research provided evidence that the poor health of the Chinese old people was much as for their British counterparts related to the advancing age. The findings of the London study showed that two thirds (66.7%) of those in poor health were of the age 75 and above, and the vast majority (83.8%) were of the age 70 and above. Comparable findings were also found in the Hong Kong study where half of those who had a self evaluation of poor health were of the age 75 and above, while two thirds (66.6%) were aged 70 and above.

In addition to the age factor, the findings in both London and Hong Kong also support the British research findings about the gender difference in health and disability (Harris, 1971; Campling, 1981, p.142; Walker, 1987, p.185). Of those who perceived their health as poor in the two places, the majority were women. Moreover, the proportion of older Chinese women affected by rheumatism, which was likely to cause considerable restriction in physical mobility, was found to be 2.5 times of that of older men in London and 2.25 times in Hong Kong. Women also had higher rates of other physical problems, such as trouble with legs and feet (3 times higher in London and 2 times higher in Hong Kong) and constant dizziness (about 8 times in London and 2 times higher in Hong Kong).

However, inspite of the fact that there is a correlation between incapacity and advancing age, it needs to be pointed out that not all old people at their advanced age must be suffering from poor health and functional incapacity. The general feedfack given by old people in response to the question asked about their subjective perception of their own health conditions, was that there were as many Chinese old people in London who regarded themselves as healthy rather than unhealthy. Findings in Hong Kong showed that there was a higher proportion of old people who regarded their health as poor, but still over half of the old people interviewed regarded their health as good or fair.

TABLE 7.1 : SELF PERCEPTION OF HEALTH CONDITION

	H.K %	London %
Very Good	/	/
Good	18	31
Fair	35	39
Poor	35	26
Very Poor	12	/
No Comment	/	4

As a matter of fact, the London research findings showed that half of the Chinese old people could manage bathing and washing their hair without needing any assistance, while more than half could put on footwear by themselves (60.9%) and could

use the toilet without much difficulty (55.7%). Comparable research findings can also be found in Hong Kong : about three quarters (70.3%) of the Chinese old people had no difficulty in shopping by themselves, while majority (82.4%) could manage to do laundry work by themselves. These findings in Hong Kong and London matched well with the British research findings that majority of the elderly people living in the community were not functionally impaired (Hunt, 1978, p.73).

Apart from the fact that the poor health of the old people may generate the need for care, it is important to note that the state of "wellness" and functional incapacity can be as much a consequence of the social disadvantages and constraints faced by the Chinese old people as biological illness. This socially constructed incapacity has been found among the Chinese old people in London whose ability to maintain independent living was hampered by their failure to communicate and their immobility due to the language barrier. Some Chinese old people in London were found to have been more or less housebound for several years due, not to their physical frailty, but to their social handicap and the sense of insecurity caused by their failure to master the language. Take hair cutting and hair dressing for example, while people usually had these two tasks done by the commercial sector, most Chinese old people, especially elderly women, did not do so. Because of the failure in communication and the sense of insecurity it created, most Chinese old women would rather have

their hair done at home by family members. Some Chinese elderly who could travel on their own would go to the barber shop at Soho or to the Chinese Community Centre to have their hair cut by volunteers. However, this practice also created some inconvenience because, on the one hand, many could not travel on their own, while on the other hand, volunteers in the Chinese community centres had to be arranged in advance and they were not always available. So this social disadvantage caused by the language barrier and cultural differences posed much difficulties for the Chinese old people in some items of self care where their British counterparts would find few problems.

In summary, Chinese old people are not as frail and incapable as commonly believed. There is a significant proportion of old people who are both objectively healthy and perceive themselves to be so. Nevertheless, it is indisputable that health deteriorates with advancing age, and some aspects of incapacity are often a function of ill health. Yet the needs for care and assistance among the Chinese elderly are not only a consequence of physical frailty and illness, but also the social circumstances they faced which circumscribed the independence, mobility and activity. In the next section I shall highlight only briefly the needs of old people for care so as to give a background for an in-depth examination of the caring capacity of the Chinese family.

Needs and the Production of Care

Bradshaw (1977) suggested in his analysis of social needs that need is not an absolute concept. It is hard to judge need without reference to a socially desirable standard. Thus when the need of Chinese elderly for assistance is to be assessed, due consideration has to be given to the special social and cultural contexts of this group of old people. As I have argued earlier, need for assistance among Chinese old people is not purely a result of physical disability, but is as much a function of the social constraints they faced. For example, the Chinese elderly in London may have difficulty in doing shopping due to a social handicap. So in the process of understanding the need of Chinese old people in terms of self-care and household management, special notice has to be given to the basic social and cultural barriers which may restrict the daily functioning of the old people.

For this purpose several indices which aimed at assessing the incapacity and needs for care were studied (for example, Shanas, 1979; Horowitz, 1984; Hunt, 1978; Stephens and Christianson, 1986; Qureshi and Walker, 1989), and a modified index was devised for the study in London and Hong Kong which incorporated those indicators which reflect the difficulties caused by social and cultural constraints of the Chinese old people in the two places. The index designed for this purpose

consisted of three different but closely interrelated dimensions : personal care (tending), household management and maintenance, and social survival. In each dimension there were certain tasks which were important for old people living on their own. Each Chinese elderly person interviewed was asked about their level of difficulty in performing that particular task by their own effort. Then old people were asked whether they were helped or not. It is worth noting that the latter question was not a follow-up question of the former, nor were these two questions mutually exclusive. The rationale behind was that the need for assistance on the part of the old people did not necessarily equate with the provision of assistance. In other words, care might still be given in the circumstances where old people could manage themselves without any difficulty. So receiving assistance does not necessarily imply dependency of the old people, but it might rather reflect the anxiety on the part of the care providers about not giving any help. Thus, based on this design it is possible to see whether there is a shortage of provision or whether assistance is provided where difficulty does not exist.

In relation to personal care, the details of the findings are shown in Table 7.2 below. Similarly, the Chinese old people being interviewed in London and Hong Kong did not show a high percentage of severe disability and incapacity. Relatively few old people could not perform the personal care tasks by

TABLE 7.2 : NEEDS OF CHINESE OLD PEOPLE AND HELP
RECEIVED BY PERSONAL CARE

	NEEDS LEVEL		HELP RECEIVED		SHORTFALL
	Some Difficulty Alone	Cannot Do Alone			
Bathing	21 (45.7%)	2 (4.3%)	12 (26.1%)	47.8%	
Washing Hair	18 (39.1%)	5 (10.9%)	21 (45.7%)	8.8%	
Dressing Up	9 (19.6%)	2 (4.3%)	2 (4.3%)	81.8%	
Eating	7 (15.2%)	2 (4.3%)	5 (10.9%)	44.4%	
Putting On Footwear	18 (39.1%)	/	7 (15.2%)	61.1%	
Using Toilet	23 (50%)	2 (4.3%)	21 (45.7%)	16%	
Getting In and Out of Bed	21 (45.7%)	/	14 (30.4%)	33.3%	
Hair Cut	21 (45.7%)	23 (50%)	44 (95.7%)	/	
Cutting Nails	37 (80.4%)	2 (4.3%)	23 (50%)	41%	

themselves without assistance. Nevertheless, there were still some particular personal care items which more elderly people handled with difficulty. On average, about two fifths (42.3%) of old people being interviewed encountered problems in all of

the personal care items.

As in the household management and maintenance dimension of needs, the statistical breakdown is shown in Table 7.3 below. The two items of household work which most Chinese old people encountered with difficulties were shopping (34.8% in London; 24% in Hong Kong) and doing household repairs (76.1%). As far as the task of shopping was concerned, Chinese old people in both places claimed that they could not do heavy carrying, and some claimed that they could not walk for a long distance due to weakness in their legs and feet. Specifically in London, the physical weaknesses were exacerbated by some who had restricted mobility due to the social and cultural gap. This difficulty was well reflected in the statistical difference between London and Hong Kong. Overall, roughly about one fourth of the Chinese old people could not manage household maintenance on their own, while another third (37.4%) experienced some difficulty in these tasks.

TABLE 7.3 : NEEDS OF CHINESE OLD PEOPLE AND HELP RECEIVED
BY HOUSEHOLD MANAGEMENT

	NEEDS LEVEL		HELP RECEIVED		SHORTFALL
	Some Difficulty Alone	Cannot Do Alone			
Laundry	27 (58.7%)	5 (10.9%)	32 (69.6%)	/	
Preparing for meals	16 (34.8%)	2 (4.3%)	30 (65.2%)	/	
Ironing	9 (19.6%)	2 (4.3%)	12 (26.1%)	/	
Household Repairs	9 (19.6%)	35 (76.1%)	44 (95.7%)	/	
Shopping	25 (54.3%)	16 (34.8%)	39 (84.8%)	4.9%	

As argued earlier, the language barrier and other cultural gaps had created additional difficulties for the Chinese old people who lived in London in regard to independent social living. The most unique items of need were respectively the need for being escorted out and for a translation service. About half (45.6%) of the old people in London either could not do without translation or had some difficulty without this service. The lack of translation and interpretation had been an important factor contributing to the isolation of the old people. For example, many Chinese old people could not manage any written or spoken communication independently, and so were restricted in seeing the GPs, answering telephone calls, reading letters, and

even watching television. As a consequence, some Chinese old people, although not actually housebound, had very limited scope of activities and only rare encounters with the world outside the Chinese circle.

In relation to the need for a translation service, slightly less than half (45.7%) of the old people could not go out without being escorted, and 15% experienced some difficulty if not escorted. On the other hand, findings in Hong Kong showed that only 16% needed an escort when going out for social purpose. Many Chinese old people interviewed in London explained that they needed to be escorted out not because of their physical frailty, but of the fact that they could not master the language and they could not use the public transport. The fact that Chinese old people could not travel without an escort had imposed a severe restriction on their mobility and independence. In the context of the Chinese community in London where the hours of work of their sons and daughters were so long, this meant that they were virtually housebound unless they could obtain help. For those who went out by themselves but with difficulty, it had also created not only considerable insecurity and uncertainty in the part of the old people, but also a deep sense of guilt in the part of the family.

In general, there were about one quarter (28%) of the Chinese old people in London who were unable to perform the

activities listed along the social survival dimension. Details of the breakdown were listed in Table 7.4 below. In the next section, the controversial question concerning the caring capacity of the Chinese family for the old people will be discussed and answered.

TABLE 7.4 : NEEDS OF CHINESE OLD PEOPLE AND HELP RECEIVED
BY SOCIAL SURVIVAL

	NEEDS LEVEL		HELP RECEIVED	SHORTFALL
	Some Difficulty Alone	Cannot Do Alone		
Making Phone Call	14 (30.4%)	9 (19.6%)	18 (39.1%)	21.7%
Information and Advice	/	9 (19.6%)	9 (19.6%)	/
Translation Service	2 (4.3%)	19 (41.3%)	21 (45.7%)	/
Escorting Out	7 (15.2%)	21 (45.7%)	28 (60.9%)	/
Using Taxi	12 (26.1%)	7 (15.2%)	7 (15.2%)	63.2%
Using Public Transport	21 (45.7%)	12 (26.1%)	21 (45.7%)	36.4%

The Caring Capacity of the Chinese Family

The caring capacity of the Chinese family is assessed by four different but related sets of indicators : first, the amount of help that old people received along the three dimensions adopted above; secondly, the frequency of assistance Chinese elderly received; thirdly, the objective shortfall reflected by the shortage of provision compared to the level of needs; and finally, the subjective assessment by the old people of the adequacy of help received. The main arguments established from the findings in London and Hong Kong are threefold. First and overall, the Chinese family is active insofar as caring for its old people is concerned, but the effective size of the "caring network" is confined within the horizontally extended family - the sons, daughters, in-laws and the grandchildren. Secondly, the extent to which Chinese old people were helped varies according to the fundamental nature of the caring activities. Finally, help in some intimate items of personal care is highly selective. Affective and obligatory compatibility between the carers and the old people are the required cornerstone of the provision of such care. The following discussion will begin with a detailed analysis of the caring capacity of the Chinese family in Britain with cross references with the study in Hong Kong.

1. The Receipt of Care and Assistance

As far as personal care for the Chinese old people is concerned, the belief that the caring function of the Chinese family has been totally eroded by industrialisation and westernisation, at least in the cases of London and Hong Kong, has been shown to be incorrect. The research findings in London showed that all items of need faced by Chinese old people were being met to varying extents. As shown in Table 7.2 above, about half (45.7%) of the Chinese old people were helped in hair washing, and a similar proportion were being helped in using the toilet. On the other hand, about one quarter (26.1%) of the Chinese old people were helped with washing all over, while about one third (30.4%) were helped in getting in and out of a chair or bed. As regards personal care activities such as cutting nails as well as hair cut or hair dressing, this study revealed quite a different situation compared with the findings of the British counterpart where most old people were helped primarily by hair dressers and chiropodists. But in the Chinese circumstances, few old people were helped by professional hair dressers and chiropodists unless they were absolutely incapable of self help or no one in the family could help. In relation to these items of need, this study revealed that half (50%) of the Chinese old people received assistance in cutting nails while a vast majority (95.7%) were helped in hair cutting or hair dressing. On average, about one third (36%) of the Chinese old people in

London were helped in items of needs in the personal care dimension.

Interestingly, the findings in London for personal care of the old people are similar to those for Hong Kong. In the latter, over two fifths (44.4%) of the Chinese old people received help in personal care, particularly in bathing and washing hair, though the intensity to which old people were helped in these two items might be varied. Furthermore, a similar proportion received help in hair cutting or hair dressing, while about one third (33%) received assistance in cutting nails. As for the other personal care activities such as eating and dressing, the majority of the Chinese old people in Hong Kong could manage by themselves, but there were about one tenth (11%) who could not manage who received help, mainly from their spouse. On average, the Hong Kong study showed that help in personal care was available to the elderly relatives and that about one in three (29%) received assistance from their family members. This finding agrees with the general study of the needs of the elderly needs by Hong Kong University which was quoted above.

As regards the activities in the household management and maintenance dimension, Chinese old people in the London study were being helped in all items of need, and the average ratio of Chinese old people being helped was even found to be twice as

high as in personal care (68.3%). Specifically, the vast majority received assistance in shopping (84.8%) and in household repairs (95.7%). In addition, over half of the Chinese elderly received help in laundry (69.6%) and the preparation of meals (65.2%), while about a quarter (26.1%) were helped in ironing (Table 7.3).

On the other hand, the findings in Hong Kong also showed that old people there had received extensive assistance in the aspect of household maintenance and managements. For example, half (50%) of the elderly respondents there were helped in shopping (in Hong Kong it was usually done daily), laundry as well as preparing for meals. In addition, more than half (55%) received help in carrying heavy equipment and utensils at home, and about one third (33%) received assistance in ironing clothes. Overall, about two thirds (67%) of the Chinese old people in Hong Kong received help on this dimension of need, which, like the London findings, was about twice as high as in personal care.

From the above analysis, it appears apparent that Chinese old people received more help in household maintenance, and this finding coincides with the study of Qureshi and Walker in Sheffield (1989, p.83). Nonetheless, this is not surprising in the context of the Chinese family. On the one hand, the Chinese old people who were helped in personal care, household maintenance and social activities were those who lived with their

families and also some who lived alone. On the other hand, as I have argued in the previous chapter, Chinese old people living with the adult child and family have always been treated as one of their family members. Moreover, if the guest-host relationship is properly placed whereby the old people are given the status of the guests, it would somehow be expected that these household maintenance tasks are to be performed by the host family. However, as I have also argued in the previous chapter, Chinese old people often had to strive hard to locate themselves in an acceptable and appropriate position in the family by making contributions in certain subtly agreed areas such as baby sitting, ironing clothes and preparing for meals. But the extent to which they should participate in the household affairs varied from one family to another, depending on the need of the host family and the ability of the old people. Anyhow, it seems quite clear that despite elderly people's own participation in household chores, assistance was still being given extensively.

As far as the activities in the social survival dimension is concerned, the findings in London (Table 7.4) showed that Chinese old people were also being helped in all items of needs, and the average level of assistance they received (37.3%) was also found to be very close to that in the personal care dimension. For example, about two thirds (60.9%) of the Chinese elderly were helped in escorting out, and about half (45.7%) received assistance in translation and interpretation, while a similar

proportion were helped in using public transport. For those old people whose normal and independent mobility may either be restricted by their functional incapacity or by social constraints, escorting out and helping to use public transport were often the two main forms of assistance given to Chinese old people in order for them to maintain self worth. Apart from these items, two out of five (39.1%) received assistance in making phone calls, and one fifth (19.6%) were given information and advice so as to strengthen their ability for more independent mobility.

In the case of Hong Kong, Chinese old people there had not suffered from the social handicap experienced by their counterpart in London which was a result of the language barrier and the cultural lag. Nevertheless, some old people who were handicapped by their physical frailty also needed help in escorting out, using public transport and in seeking medical consultation and treatment. In this respect, only about one fifth (22%) of the Chinese old people were given escort when going out and using public transport, while more than half (56%) received help in seeking medical consultations and treatment. Nonetheless, a noticeable proportion (22%) of Chinese elderly respondents in Hong Kong were not given any escort for social purposes though they wished to be helped.

The direct comparison between these two sets of data from

London and Hong Kong showed that fewer Chinese old people in Hong Kong seemed to have received assistance in relation to social mobility, although quite apparently help was still extensively given in certain items being regarded as important, such as seeing a doctor. This reflects, on the one hand, that there is a more pragmatic interpretation of elderly needs in Hong Kong, so that the social needs of old people were being regarded as less important. On the other hand, however, it also reflects an absence of back-up carers. This is particularly true in Hong Kong in light of the fact that grandchildren there only play a marginal role in the caring of their elderly grannies.

As an overall assessment, the findings consistently revealed that Chinese old people did receive help from their family in different dimensions of their needs. However, the assistance given was somehow not necessarily targeted at those who are functionally incapacitated. Take household maintenance for example, sometimes these tasks were handled by the household members not because that the old people who live together could not handle, but rather that it reflected a distribution of household responsibility within the family. Nonetheless, the average level of assistance Chinese elderly people received across the board in different dimensions of their needs was still quite remarkable : on average, about half (47%) of the Chinese old people in London received assistance in various items of needs in personal care, household management and maintenance, as

well as in social living, and the findings in Hong Kong were found to be comparable. Therefore, as far as the reception of assistance is concerned, the assumption that the caring functions of the Chinese family has been eroded or diminished is, therefore, largely incorrect.

2. Frequency of Help

Frequency of care received by the old people can be affected by different factors. It may be a direct response to the expressions of needs of Chinese old people, but on the other hand, it may also reflect the availability of care with or without regards to the needs of the old people. In this study the frequency of assistance is used to indicate, among those old people who have received assistance, the level of care they received by how many times in a prescribed interval.

Personal care for old people consists of activities which demand high levels of patience and attention. Some activities involved in tending, such as helping old people get in and out of a chair or a bed, as well as using the toilet, are those which require remarkable levels of frequency, immediacy and consistency. Apart from this, some other personal care activities such as bathing, dressing, eating etc. may require secure and regular labour, on top of the qualities mentioned above. Other personal care activities such as hair dressing,

washing hair or cutting nails may not demand high level of frequency but still require an assured level of regularity and availability. This could be understood in terms of the daily activities of old people whereby, for example, using the toilet and getting in and out of a chair is very much an activity which requires a certain level of immediacy and is difficult to be arranged and helped mechanically in regular pre-set intervals. Rather contrarily, assistance is usually required once the need arises. However, it is also possible, as seen in the circumstances of some frail Chinese old people, that needs have to be put off when help is not available. So needs and help are constantly interacting in a seesaw manner and eventually arrive at an acceptable frequency between the old people and the carers. Nevertheless, despite the above, the frequency of help received by the old people may also signify to a considerable extent the amount of assistance being provided by the family.

What is the frequency of assistance Chinese old people received with personal care ? The findings of the London study showed that Chinese old people generally received frequent assistance in every aspect of their needs, although the frequency of assistance they received in personal care and household tasks were higher than that in social mobility (Tables 7.5, 7.6 & 7.7).

TABLE 7.5 : FREQUENCY OF ASSISTANCE BY PERSONAL CARE

	Frequency of Assistance					
	Daily	Weekly or More	Fort- Nightly	Occas- ionally	Rarely	Others
Bathing	/	100%	/	/	/	/
Washing Hair	/	33.3%	33.3%	9.5%	23.8%	/
Dressing Up	100%	/	/	/	/	/
Eating	40%	/	/	60%	/	/
Putting On Footwear	28.6%	/	/	71.4%	/	/
Using Toilet	76.2%	/	/	14.3%	/	9.5%
Getting In and Out of Bed	64.3%	/	/	35.7%	/	/
Hair Cut	/	/	4.5%	79.6%	15.9%	/
Cutting Nails	/	/	8.7%	91.3%	/	/

However, inspite of the regular, consistent and frequent assistance in some aspects of personal care received by the Chinese old people, there were other aspects of personal care which were helped rather infrequently. This was somehow due partly to the nature of the need itself, the availability and the

TABLE 7.6 : FREQUENCY OF ASSISTANCE
BY HOUSEHOLD TASKS

	Frequency of Assistance					
	Daily	Weekly or More	Fort- Nightly	Occas- ionally	Rarely	Others
Laundry	/	37.5%	62.5%	/	/	/
Preparing for Meals	70%	30%	/	/	/	/
Ironing	/	16.7%	41.7%	41.7%	/	/
Household Repairs	/	/	/	100%	/	/
Shopping	5.1%	89.7%	/	5.1%	/	/

perception of importance by the carers and the old people. For example, more than half (60%) of the Chinese old people concerned were helped with eating only occasionally; about three quarters (71.4%) only received occasional assistance in putting on footwear. Besides, another three quarters of the Chinese old people (79.6%) received help in hair cut or hair dressing occasionally when need arose, and a vast majority (91.3%) were helped with cutting nails occasionally.

TABLE 7.7 : FREQUENCY OF ASSISTANCE
BY SOCIAL MOBILITY

	Frequency of Assistance					
	Daily	Weekly or More	Fort- Nightly	Occas- ionally	Rarely	Others
Using Public Transport	/	/	/	100%	/	/
Using Taxi	/	/	/	100%	/	/
Escorting Out	/	10.7%	/	89.3%	/	/
Making Phone Call	/	/	/	100%	/	/
Informat- ion and Advice	/	/	/	100%	/	/
Translat- ion	/	9.5%	/	90.5%	/	/

While the latter two items of care might not require frequent assistance and the occasional help received by old people was related to the nature of their needs. Yet, eating and putting on footwear were basic activities where the difficulties of which have to be faced day to day. However, Looking at the frequency of assistance in the personal care items as a whole, it is indeed apparent that majority of the Chinese old people do receive frequent and regular care and assistance. But at the same time there were several items of care which were received

only occasionally by the old people because of the special nature of the caring tasks.

As for the dimension of household management and maintenance, the frequency of assistance received by the Chinese old people was also remarkable, although it was not as high as in the dimension of personal care. For example, about three quarters (70%) of the old people were helped in preparing meals everyday. As for shopping which ninety percent of old people either could not do or had some difficulty by themselves, a vast majority (94.8%) received help at least once a week or received daily assistance. On the other hand, laundry was also an item with which Chinese old people received regular assistance, albeit that the frequency was not as high as the other items listed above. In this aspect, more than one third (37.5%) were helped at least once a week, and the rest (62.5%) received assistance regularly once every fortnight. Ironing has been found to be an item in household maintenance which less old people felt the need, and in this item slightly less than half of the old people were helped when the needs arose. Besides, Chinese old people were also helped occasionally in household repairs, which was essentially a need which emerged in special circumstances. Overall, the assistance received for household maintenance has been found to be quite regular, though it is apparently less frequent compared with the help received for personal care.

Compared to the assistance Chinese old people received for personal care and household maintenance and management, assistance received for social survival were by and large less frequent and less regular. In the item of escorting out where about two third (60.9%) of the old people either had some difficulty without it and was completely unable to go out without it, only one out of ten (10.9%) was given assistance once every week, while help was predominantly received only occasionally. Relatedly, among the three quarters (71.8%) of Chinese old people who had difficulty or simply could not manage using public transport, all of them were only helped occasionally. These figures showed, on the one hand, that the mobility of Chinese old people was seriously restricted by the unavailability of assistance. But on the other hand, it also reflected the shortage of care due to the peculiar social and economic circumstances of the Chinese people.

3. Objective Shortfall of Assistance

Apart from the indicators showing the amount of help received by elderly people and the frequency of assistance received, the caring capacity of the Chinese family is also assessed by measuring the objective shortfall. This is done by deducting the percentage of help received from the percentage of possible needs of the old people. The objective shortfall is shown by the proportion of old people with a possible need but

not receiving any assistance.

Along the personal care dimension, the findings showed that there was a remarkable shortfall in nearly every item of need, except in the aspect of hair washing where the shortfall was relatively low and in hair dressing where there was no shortfall at all (Table 7.2). The relatively low shortfall in these two items was however directly related to the low frequency these tasks required and the relatively low labour intensity it demanded. On the other hand, in the circumstances whereby higher frequency and more consistent efforts of assistance were required, the objective shortfall had been found to be much higher. For example, about half (47.8%) of the old people who needed help in bathing were not helped; one third (33.3%) of the old people received no assistance in getting in and out of a chair or bed, and one sixth (16%) were not helped in using the toilet. On top of these, there were shortfalls of 61% in helping old people put on footwear; 44% in helping old people with eating, and another 41% in cutting nails.

Apart from personal care, the situation of objective shortfall in household management and maintenance was entirely different (Table 7.3). The only shortfall seen in this dimension was in shopping where the percentage was rather insignificant (4.9%), and there was no shortfall in the work of laundry and household repair. More interestingly, there were two items of

work in household maintenance where excessive provision can be found, implying that more work was done for the old people than they actually needed. The specific examples were the preparation for meals where there was a surplus provision of 40%, and there was also 8% surplus in the work of ironing. The reason for having a surplus in the provision of assistance is many fold : on one hand it apparently reflects the availability of household managers despite the presence of the old people at home; on the other hand, it is also due to the social expectation in the distribution of household tasks. More importantly, though helping in household work is by nature different entirely from personal care.

Despite the objective shortfall of assistance revealed above, some key services in the social survival dimension were also provided to the old people who have difficulty in managing by themselves (Table 7.4). For example, all of those Chinese old people who needed to be escorted out received assistance as required. On the other hand, however, there was a 36.4% shortfall in helping old people use the public transport. These two figures appear to be contradictory, but the underlying reason is congruent. In the first place, asking for an escort in an actual sense posed difficulty and extra burden to the family members. That was why Chinese old people by and large refrained from asking for an escort unless it was absolutely necessary. So the frequency required for escorting had remained to be only

occasional and quite minimal. However, for those old people who could manage to go out by themselves provided they were helped, for example taking them to the bus stop, helping to get on the right bus service etc., providing sufficient assistance may mean higher frequency of help and extra work, and consequently may pose additional difficulty for the carers.

On the other hand, objective shortfall reflected by the findings of the Hong Kong study was relatively much smaller. Take the personal care items for example, the statistical findings showed that there was no discrepancy between the need for assistance in such activities which required a close and intimate personal encounter as bathing and shampooing, and the shortfall in other personal care items as appeared in the statistics was also very minimal. Besides, help with the household tasks was most often over-provided, meaning that assistance was given even in situations where need of the old people was not present. This situation of over provision in household tasks in Hong Kong supported the argument made above that it signified as much an allocation of the host-guest relationship as the distribution of caring responsibility.

In spite of the above, however, it did in no way appear that the needs of Chinese old people in Hong Kong were completely fulfilled by the family. When one looks beyond the descriptions of the statistics for the underlying reason, one finds that in

many cases the absence of shortfall was due considerably to the withholding of requests by the Chinese old people. This is again related to the analysis made earlier concerning the place old people were allowed to locate in the family. In some circumstances old people might have to tolerate the actual inconveniences as well as the emotional frustrations in disguising the need for help in order to exchange for less challenge by the family members.

Overall, in spite of the apparent assistance provided for the Chinese old people, there were objective shortfalls in different dimensions of needs, and the shortfall in personal care has been found to be the highest among the three, no matter whether the shortfall was expressed openly or covertly. The reason for the shortfall is certainly due to the availability of care and support, but more importantly, it is a result of the difference between personal care and the assistance in the other two dimensions. The former is not just a matter of labour or assistance, but rather it heavily involves a private and intimate encounter between the old people and the carers. Finch and Groves (1984) suggested that informal care by the family and specifically by the female kin is essentially a labour of love. This is not to say that those who involved in the help of their own elderly relatives must mutually enjoy intimate relationship, nor does it imply that it is an outcome of the involvement of care. Nonetheless, this intimate encounter involved in the

process of personal care may deter people in the relationship network, who may both be the elderly or the carers, to enter into this tending relationship. Daatland (1981) explained this special kind of personal interaction, basing on the concept borrowed from the role theory, in terms of role compatibility. Although the analysis Daatland put forward is only one dimensional, and has a tendency to overlook the gender inequality of care division as well as the affective and obligatory basis of personal link, it can nonetheless be expanded to cover the affective as well as the obligatory compatibility between the old people and the carers. In other words, the affective and obligatory compatibility required in the relationship of personal care is much higher and more selective than in the household tasks. As a genuine result, the availability of carers in the informal networks does not at all guarantee the provision of personal care.

The findings in the next section will show that informal carers in those intimate items of personal care, such as bathing, are highly selective. The London study showed that out of those who were not helped in bathing, all of them claimed that they could do so by themselves, yet with considerable difficulty. A similar situation can be found in dressing up, cutting nails, as well as putting on footwear. In other words, some old people may rather suffer from the difficulty of not being helped in certain items of needs than to tolerate the incompatibility and the

tension that subsequently emerged out of the caring relationship. Putting it in a nutshell, the role, affective as well as obligatory compatibility required in the intimate encounter of personal care have limited the scope in the selection and availability of carers, and it is, in this sense, not surprising that there is quite a remarkable shortfall in the personal care of Chinese old people. In the next section I shall discuss the subjective perception of Chinese old people towards the adequacy of assistance they received.

4. Subjective Perception of Service Adequacy

One of the most important indicators used in assessing the caring capacity of the Chinese family is old people's own perception of whether they have received adequate help. The old people were asked, in addition to the question whether they have received assistance or not, about whether they have received enough assistance. This response of the old people can be regarded as an indicator signalling their felt needs. However, the felt need is not taken as the sole indicator showing the real level of assistance they received, it is used to cross-check with the other indicators used above and to see if there is any disparity.

In this respect, the research findings showed that there was no direct relationship between the presence of objective

shortfall and old people's perception towards the adequacy of the assistance they received. Generally speaking, the subjective perception of old people matched quite well with the analysis of the objective shortfall. For example, 41.7% of the respondents felt that help in bathing was not adequate, where the objective shortfall is 47.8%. Similarly, 14.3% felt that help in using the toilet was inadequate where the shortfall was 16%. In addition, the subjective perception also matched very well with the analysis of objective shortfall in the household maintenance dimension. For example, nearly all elderly respondents felt that they were helped adequately in household maintenance where there was only very minimal objective shortfall. So the overall picture portrayed from the feedback of the elderly respondents appeared to be that the assistance they received had been quite adequate. This feedback of the old people was found to be very common between respondents in London as well as those in Hong Kong, where in the latter particularly, vast majority of the respondents expressed that the help they received was sufficient. However, on the other hand, it is also found that in certain circumstances where shortfall of assistance was objectively present, no one being interviewed felt that assistance was not adequate. This situation of felt need not matching with the analysis of objective shortfall can be found in nearly all dimensions of old people's needs. Amongst the many examples the most notable ones are from the personal care for the elderly found in the London study. For instance, a 33.3% shortfall had

been found in helping old people with getting in and out of a chair/bed, but no one perceived the assistance as inadequate. On a similar line, all old people interviewed felt that the help with dressing up was adequate, but there was an objective shortfall of 81.8%.

Notwithstanding the Chinese concept of face which may have discouraged old people to express their dissatisfaction to the researcher (who is an outsider to the family concerned), the findings imply that some felt needs of the Chinese old people were not adequately expressed. According to Bradshaw (1977), felt need is often limited by the perception of the individual -- whether they know there is a service available, as well as a reluctance in many situations to confess a loss of independence. In the case of the Chinese old people, there is also a reluctance in admitting the inadequacy of the assistance they received. This is so partly because the Chinese old people avoid the feeling of dependency, but also to avoid the relationship tension between the old people and their family members which may arise out of their complaints. This is consistent with the analysis in the previous chapter that the fear of trespassing in the part of the old people not only limits them in participating in family affairs but also discourages them in asking for help. This complex feeling of the Chinese old people is shown by the fact that many said that they would not ask for assistance unless it was absolutely necessary. It clearly showed the needs of old

people to remain independent and to retain self dignity. For some who needed to be taken care of, the feeling of loss of independence seemed also to have eroded their right of choice, because according to the Chinese elderly, once they had lost their ability to reciprocate and had to depend on the others for personal care and daily maintenance, they have to receive whatever assistance was being provided.

To conclude this part of the chapter, it needs to be pointed out that most Chinese older people are capable of looking after themselves. There are some old people, albiet that it is a minority, whose needs for care in different aspects of their lives are not met. But for the majority who have difficulty in taking care of themselves, the family is still continuing to provide the required care and assistance, regardless of whether they live together. The range of assistance being received by the Chinese elderly extends from personal care or tending to household maintenance and social survival. However, the extent to which Chinese old people were helped varies according to the fundamental nature of the caring activities. Speaking specifically, personal care involves an intimate personal encounter between two individuals, and the selectivity of carers is relatively more restricted than helping with household maintenance and social survival. On the other hand, the provision of assistance in the areas of household maintenance has been found to be more adequate and generous. In some aspects of

needs such as the preparation of meals as well as ironing, old people were even helped where the needs did not appear to be present. This over-provision may reflect the eagerness of the family members to take over the work of the elderly people in the family. In the perspective of the family members and in particular those who live with their elderly relative or parents, helping in the household chores is a contribution to the old people in particular as well as to the whole family at the same time. This is also why a shortfall exists less seriously in the aspect of household maintenance for old people. Nonetheless, despite the shortfall, the majority of the old people are satisfied with the level of assistance they received and subjectively perceived the service as adequate. As a whole, the thesis that westernisation and industrialisation have together washed away the caring function and capacity of the Chinese family is without foundation. The negative image that old people are incapacitated and that they are mostly abandoned or neglected by their family is also an incomplete picture. In the following section I shall examine the division of caring responsibility within and without the Chinese family.

The Division of Caring Responsibility

It has been shown in the previous section that the Chinese family is the primary source of informal help for the old people. By saying this it essentially means that the Chinese elderly are

by and large being taken care of by the family members or other relatives outside the family. In this respect, research findings from both Britain and the United States similarly concluded that it is mainly female kin who are primarily the daughters of the old people who take up the caring responsibility. Traditional Chinese values which governed the gender division of labour, as I have discussed in the previous chapter, also demanded women in the family to perform the nurturing and caring tasks. However, when the female kin of the family is taken into account, the traditional Chinese practice often referred to daughter-in-laws, which is different from the western society where it is taken to mean daughter. This situation was mainly due to the patrilocal practice and its related norms that a daughter after marriage would become a member of the husband's family. Serving the mother-in-law would therefore become one of the daughter-in-law's major responsibilities. However, in the present situation when neolocality has somewhat replaced patrilocality, and that Chinese women are much more active economically, are the in-laws still performing this traditional role? In view of the important role daughters play in western society as far as informal care is concerned, what then is the role of the Chinese daughters as compared to their British counterparts? From the analysis of this research I shall attempt to answer these questions. In the following section I shall examine specifically the question who take care of the Chinese elderly in the circumstances of needs. The discussion will also cover how and why the caring tasks are being divided by the family.

1. The Role of the Chinese Daughters

Traditional and normative practice guiding the proper role of married daughters appeared to have been ineffective in today's Chinese context. As far as the care for elderly parents is concerned, daughters regardless of whether they are married or not, remain to be the one who takes up the primary responsibility in taking care of the elderly parents. This is particularly so as far as personal care is concerned. Moreover, not only that daughters are more active in helping, but more specifically daughters are usually the primary helpers in those activities whereby intimate personal encounters are involved. For example, bathing is basically a private and personal activity in the Chinese context. Helping in bathing implies an intrusion of one's fundamental privacy which is by and large not a pleasant experience. For those elderly who need to receive assistance, a person in an effectively intimate and socially acceptable position would make this personal and private encounter less threatening and reluctant for both the elderly and the carers.

In this respect, who are the ones to fill in the gap? The findings in the London Chinese community showed that more than half (58.3%) of those who were being helped in bathing received help from their daughters. This group of Chinese old people were mainly elderly women who either lived with their daughters or live close to them. Comparable findings gathered in Hong Kong

showed that daughters were the only carers available to the older parents in these personal care tasks next to the spouse. This finding signifies that the affective as well as obligatory compatibility between daughters and elderly mothers may be perceived as relatively more comfortable and less threatening as far as the intrusion of personal privacy is concerned. This is not to say that daughters are therefore made to be perfect personal carers, but only to say that this may also become one of the main factors which perpetuate gender inequality in caring.

Similar evidence can be found in the finding that daughters were also the main helpers in some other personal care activities. For example, about one third (35.7%) of the elderly in London who were helped in getting in and out of a chair or bed received assistance from their daughters; another one third (33.3%) were helped by daughters in shampooing, and again slightly less than half (42.9%) of Chinese old people were helped in putting on footwear by their daughters. In the item of cutting nails where most British counterpart received assistance from chiropodists, most Chinese elderly received help also from the source within their family, and about half (47.8%) were helped by daughters. On the other hand, similar findings were found among Chinese respondents in Hong Kong where two fifths (40%) of the nails cutting were helped by daughters, and they were the only helper apart from the spouse of the old people in helping in washing the old people's hair. In spite of the

involvement of daughters in different items of help, the overall situation also pointed to the same direction : Daughters were involved in nearly all items of personal care for Chinese old people, and they were the primary carers for the greatest proportion of Chinese elderly people who were in need of personal care.

Apart from the significant role of Chinese daughters in personal care for the Chinese old people, they were also involved in helping old people in household activities, although in this aspect daughters-in-law were also found to shoulder the main responsibility in helping. As far as household maintenance is concerned, Chinese daughters often fit in where old people lived apart from their sons and daughters-in-law, or they will have their sole responsibility if they lived with the elderly parents. In this light, the findings in London showed that about one quarter (23.3%) of the Chinese old people were helped in the preparation of meals by their daughters; over half (58.3%) were helped with ironing, and about one fifth (18.7%) received assistance in laundry from their daughters. Again similar findings could be found in Hong Kong where half of the elderly respondents were helped in cooking by their daughters, while one thirds (33.3%) were helped by daughters in shopping, laundry, and ironing.

In the dimension of social mobility, although Chinese

daughters seemed to be in a less important helping position, yet they shouldered the heaviest responsibility in escorting the old people out. As I have argued above, escorting out is not simply a physical activity, it involves quite a lot of time, effort and attention. It is most often found that Chinese daughters had to put their activities aside in order to escort old people out. So apparently, Chinese daughters are the main helpers in personal care and they are also the ones who give the most of time, labour and attention in taking care of the elderly parents.

Nevertheless, it is also important to note that Chinese married daughters, apart from bearing the primary responsibility in the personal care for their elderly parents as well as in escorting them out, have to shoulder additional burdens from their own marriage family. To begin with, married daughters themselves are also loaded with responsibility of nurturing and care in their own families. They are also the one who shoulder the primary responsibility of household maintenance and taking care of the husband and children. Indeed, in the eyes of the husbands, the primary responsibility of the wives is in the patrilineal family but not their original ones. This can be demonstrated by the findings that son-in-laws had very minimal involvement in helping the elderly parents-in-law, and by maintaining a proper distance, an indirect and implicit message about the difference of the 'two families' had been put forward. The remote reaction of the husbands had somewhat been transformed

into a tension in relationships. On one hand, married daughters who had a responsibility of personal care for their own elderly parents have to have their own family served before efforts are devoted outside. A prolonged export of care and attention would likely to arouse complaints and relationship tension with the husband. This is particularly likely when the old people have sons and family around but are not receiving help from that source. It is, therefore, indeed obvious that Chinese daughters today are loaded with dual caring responsibilities whereby one is for their own family and the other is for the personal care of their own elderly mothers.

2. The Role of the Daughter-in-laws

Women in the traditional Chinese society have always been subordinate to men, and the role of the daughter-in-law was particularly a tragic one. As I have stated in the earlier chapters, the wedding ceremony and the practice of the 'bride price' had symbolised a legitimate commodification of daughters, who after married would become a member of the husband's family. This member, however, is subject to follow a broad range of normative and social expectations sanctioned by the family and the kinship community. Amongst the many work responsibilities the daughter-in-law had to shoulder, she had the sole responsibility for the household maintenance and for taking care of the young and the old. But in the modern Chinese family, are

daughter-in-laws still taking up this role ? This question is particularly interesting to explore in the light of the rising economic status of married Chinese women.

The findings of the London study showed that daughters-in-law were still the main bearer of household responsibility. Not only so, they were also the ones who help the elderly person most in the household maintenance and household management. This can be shown by the findings that the highest proportion (31.3%) of elderly people received assistance in laundry from their daughters-in-law, and that most Chinese elderly people (33.3%) were also helped by daughters-in-law in preparing for meals. Besides, as far as shopping is concerned, daughters-in-law had outnumbered other relatives and had become the second most important helper next to the sons, and daughters-in-law offered help in almost every aspect of household maintenance except in household repairs which is traditionally a male job. So it is apparently clear that daughter-in-laws are still the ones who offered the most assistance in household maintenance to the old people.

On the other hand, daughters-in-law in Hong Kong were found to be the primary managers of household tasks (Chiu, 1989), inspite of the fact that they were less heavily involved compared to their counterparts in London. This was found especially true among the daughters-in-law who were employed outside the family.

Nevertheless, many Chinese old people in Hong Kong who lived with their married son and his family tended not to treat such household tasks as cooking, shopping and laundry as help offered by the daughters-in-law. They were rather explained as the household duty of the housewives. Having said so, it is not to imply that Chinese old people in Hong Kong are merely passive recipients of help in the family, but instead numerous examples and statistic findings together showed that old people had been active contributors and helpers at home. This point will be elaborated under a different heading below.

Apart from showing that daughters-in-law are still the primary household managers in today's Chinese family, they are however, found to be playing a less demanding role in taking personal care of their mothers-in-law who are in most cases living with them. This is not to say that there is a drastic change in the role of daughters-in-law in the Chinese family and that their traditional tending role has been diminished. But rather their exclusive role in taking care of the family members, particularly the old and the sick, is gradually shared and partly taken over to a considerable extent by the daughters of the elderly people. This is evidenced by the findings in London that out of the total of nine items of caring activities included in the checklist of personal care, daughters-in-law were only involved in five items, while daughters have participated in eight. Moreover, the findings also show that as far as personal

care was concerned, they were not the one which old people prefer to rely on. Similarly in Hong Kong, no daughter-in-law was engaged by Chinese old people as their primary helper in such intimate caring activities as bathing and shampooing.

However, one can still never overlook the importance of daughters-in-law in the work of tending for the Chinese old people who lived together. According to the London study, one fourth (25%) of bathing was helped by daughters-in-law; another quarter (23.8%) of the Chinese old people received assistance in using toilet from daughter-in-law, while also about one fifth (19%) were helped by daughter-in-law in shampooing. In Hong Kong where although daughters-in-law were not the primary helpers in many of the personal care activities, they backed up the primary carers (who were usually the spouse of the daughter) in many of the instances. For example, the daughter may help in washing all over the old people about once every four or five days. But the daughters-in-law may help in more frequent but less intimate cleaning of the old people. Furthermore, in many of the caring activities which involve more personal encounters, such as bathing and using the toilet, daughters-in-law were often the second helper of the Chinese old people in both places. This was particularly so in circumstances where the spouse of the old people was not present.

Apparently, Chinese daughters-in-law today have deviated

quite considerably from the traditional expectations. This is partly due to the rise in the economic status of women so not only that they have more economic power to back up their own independence, but also that their activity circle has no longer been confined within the family. This is further evidenced by the fact that very limited personal care was given by the daughters-in-law in Hong Kong where women are in an even better economic position than their London counterpart. On top of this, most daughters-in-law do not owe reciprocity directly to their mothers-in-law, albeit that undeniably some were helped in baby-sitting or other household chores by the elderly parents. Furthermore, the close and intimate affective tie is built between the daughter-mother relationship, where the daughter-in-law and mother-in-law relationship is less significant. Therefore, at a time when the normative requirement is weakened, it is understandable that the in-laws have gradually withdrawn from their involvement in the personal care for their elderly in-laws.

3. The Importance of the Grandchildren

One of the most unique characteristics in the division of care in the Chinese family as found in London is the emerging role of the grandchildren in taking care of the elderly grandparents. As found in the London study, grandchildren are quite heavily involved in the personal care, and are taking major

responsibility in helping old people of the family in social mobility. As far as personal care is concerned, grandchildren have taken up many of the day-to-day caring activities which are directly in relation to the personal maintenance of the elderly. For example, two fifths (42.9%) of the old people who received assistance were helped by their grandchildren in using toilet, while another one third (35.7%) were helped in the activity of getting in and out of a bed or chair which demanded reasonably high frequency in a day. Besides, about a quarter (28.6%) of the Chinese old people were helped by their grandchildren in shampooing and in putting on footwear, and also about one third (30.4%) received assistance from them in cutting nails. However, it is important to note that grandchildren, though extensively involved in helping their grandparents, do not involve themselves in any of the caring activities which require a close and intimate personal encounter. A typical example is that grandchildren offered no help to their grandparents in bathing and dressing. Obviously, inspite of the active involvement of grandchildren in taking care of their elderly parents, their role in personal care is very different from that of the daughter and the daughter-in-law. Since they do not possess that kind of personal intimacy and relationship compatibility with their grandparents, it is not likely that they will replace the essential role of the daughters and in-laws. Yet grandchildren fill in the care gap nicely by helping the essential day-to-day personal maintenance tasks.

Apart from helping to fill the care gap in personal care, grandchildren are also the major assistance providers in the social mobility of the grandparents, and their importance is only next to that of the son in this dimension. For example, because of their language ability, they are the main providers of translation and interpretation services. In this aspect, about half (47.6%) of the old people were helped by their grandchildren. Besides, about one quarter (23.8%) of the old people received help from their grandchildren in using public transport, and slightly less than half (44.4%) relied on their grandchildren for information and advice. As regards to the assistance for household maintenance, grandchildren were seldom being relied on as the primary helpers, but they were often called forth when the daughter-in-law was occupied and thus played the role as the second helper.

This active role played by Chinese grandchildren in London has been found to be completely unique compared with the Chinese family in Hong Kong. As a matter of fact, the findings in Hong Kong showed that grandchildren only had a marginal role to play in the care of old people who lived within or outside the family. This uniqueness of the role of Chinese grandchildren, however, results from the mixture of needs, reciprocity and affection which emerged from the distinctive relationship between grandchildren and their elderly grandparents in Britain. As I have pointed out in the previous chapter, Chinese immigration to

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Britain in the sixties and seventies exemplified a different pattern from the immigration of independent professionals to Canada and Australia which uprose since late seventies and early eighties. Unlike the professionals who immigrated to other parts of the world, Chinese old people, especially elderly women, immigrated to Britain to join their sons and daughters who were there running restaurant businesses. While their children involved themselves heavily in this very long working hour trade, Chinese elderly people usually found their proper role and place at home, taking care of the grandchildren. While there seems nothing new about grandparents taking care of their grandchildren, but as the grandchildren gradually grew up, they quickly established a reciprocal and mutually dependent relationship. The Chinese grandparents, apart from being the ones who took care of the household chores, were also the ones who provided material rewards to the grandchildren. The most usual examples were for Chinese elderly to give pocket money to their grandchildren. Some Chinese old people supported their grandchildren in buying other consumable goods, and some others were even more generous because they bought flight tickets for them to travel to and from Hong Kong and China.

On the other hand, there were circumstances where grandchildren, though young in age, could contribute their effort in returning debts to their grannies. Since they were mobile and they were usually literate, Chinese old people may often rely on

them for information, translation and other practical assistance. The London study showed that there is a close affective relationship between the grandchildren and their elderly grandparents. Even for those who lived apart, grandchildren were often found to be the ambassador, visiting the elderly grandparents on behalf of their parents. Moreover, the dialects they used also reflected the intimacy between them. It was found in the London study that most grandchildren in the family could only speak English and Hak-kwa - a dialect in the southern part of Guangdong Province which was used by their elderly children. Rather interestingly many of the grandchildren could not speak proper Cantonese, which is the language spoken by their parents' generation. This language learning of the grandchildren also reflects to a considerable extent the close relationship between the elderly people and their grandchildren.

As the second generation Chinese in Britain are mostly locally born and educated, the traditional Chinese beliefs held by their parents or grandparents generation is quite remote and irrelevant to their day to day life, although some transmission of values still exists in the process of socialisation within the family. In this light, the helping relationship between the Chinese elderly and their British born grandchildren is established not in the presence of a strong normative basis which many people in the Chinese circles believe to be essential. However, it needs to be pointed out that this special caring

position of Chinese grandchildren in Britain is created and developed out of the very peculiar social and economic conditions of the Chinese population in Britain. In circumstances where there is less direct reciprocity between elderly people and their grandchildren, such as in the Chinese community of Hong Kong, it is quite doubtful that the caring capacity of grandchildren could be developed into an equivalent level.

4. Old People Themselves as Care Givers

The discussions above seems to have given an impression that old people are dependent on the daughters, in-laws, or even grandchildren for help and assistance in many of the daily living activities. While it needs to stress again that this is not the case because, as I have pointed out in the beginning of the chapter, the majority of the Chinese old people, albeit that they are old, can be able to be self care, it also needs to be reiterated that old people themselves are often the providers of assistance. Recent research by Qureshi and Walker (1989) has once again confirmed the early findings of Shanas (1968) and Townsend (1963) that old people themselves are often providers of substantial care and assistance.

This study of Chinese old people in London and Hong Kong have also come up with similar findings. Apart from the fact that Chinese old people themselves were very often household

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supporters, they are also one of the most important personal care providers. The London study showed that elderly people being helped by their own spouse in certain tending activities was very common. Overall speaking, about one sixth (16.7%) of the old people were bathed by their spouse, and it is particularly prevalent for elderly women to help their elderly husbands. Besides, elderly people were also found to be important helpers in dressing (100%) and in putting on footwear (28.6%), and they also helped significantly in the activity of getting in and out of a bed or chair (14.3%). The situation of old people taking care of their spouse was not confined to those who did not have children living around. The findings in London showed that Chinese old people were more often helped by their spouse than by children, if both of them were present. The findings in Hong Kong have been supporting this finding in the London study. In Hong Kong, spouses were found to be the primary carers even in the presence of the daughters or the daughters-in-law. For example, three fifths (60%) of the old people there were helped by the spouse in bathing, while two thirds (66.6%) received assistance from their spouse in washing hair. This is not a surprising result, because as far as the affective and obligatory compatibility is concerned, the spouse is usually in the closest and intimate position.

Moreover, cases in Hong Kong also showed that help given by old people was not confined to the spouse, although the majority

of those who gave and received assistance were actually couples. Instead, in cases where there is not a spouse, Chinese old people in Hong Kong were also found to be substantial helpers for their sisters.

5. The Role of Sons in Personal Care

Both findings in London and Hong Kong similarly found that sons shouldered very minimal responsibility in the personal care for their elderly parents, inspite of their role as major financial contributors. This is evidenced by the findings of the London study that sons had helped in only three out of a total of nine items of personal care for the elderly people. In addition, only a very small proportion of sons participated in the helping activities : only about 5% of the old people's hair was washed by their sons; 6.8% of Chinese old people received assistance from sons in cutting hair; and about one out of eight (13%) was helped in cutting nails. Comparing to sons, daughters helped 8 times more in shampooing, 3 times more in hair cut, and 4.5 times more in cutting nails. On the contrary, sons had not helped at all in other essential personal care items such as bathing, dressing, using toilet, eating and getting in and out of the bed or chair.

On the other hand, sons appeared to have more active participation in offering help in household management and

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maintenance. For example, the ratio of sons doing shopping was 3 times higher than daughters, and about half (47.7%) of the household repairs was done also by sons. Besides, they were also active in helping their elderly parents in mobility and social livings. The findings showed that most help in using public transport was given by sons (33.3%), and more than half (55.5%) of the information and advice were also provided by them. Apart from this, they were also active in escorting out as well as in helping in translation.

Several important features can be derived from the above analysis. First, there is a conservative gender division of caring responsibility in the Chinese family circle, and the stereotype of traditional Chinese gender role and responsibility has somehow been reproduced and continued in contemporary Chinese families. This is demonstrated by the findings that personal tending is still essentially a female responsibility where men have only a very minor role. It is still predominantly Chinese women, given that they are daughters or daughters-in-law, to tend for the old people, although it is generally believed in the Chinese circle that men have already been liberated and that they share a more or less equal role in personal care. This gender stereotype is also supported by the evidence that the sons shoulder more responsibility in some heavier household tasks such as shopping, household repairs, as well as laundry, despite the fact that their role in tending is minimal. This gender division

of labour in care which is currently found in the Chinese community has largely preserved the traditional practice that women should take care of the sick and the old in the family, while men have a more important role in economic production. Although the participation of men in such household activities as shopping has seemingly revealed a beginning of men stepping into the 'woman's arena', yet by doing so the division of masculine versus feminine roles and duties has further been strengthened.

Secondly, the helping activities which sons have offered are usually those which do not require frequent and regular efforts. Taking shopping for example, about 90% of help was given about once a week or more. Besides, most help in laundry was offered around once every two weeks, while household repairs were given only occasionally when it was needed. Even in the personal care of old people, Chinese sons had only helped in those items which frequency of assistance was low and irregular. So this involvement of sons in the care of their elderly parents contrasts sharply with the role of daughters and daughters-in-law whose caring activities required frequent efforts and attention. Therefore, it is apparent that Chinese sons have not been playing a primary role in the care of their elderly parents.

Thirdly, however, although the research did not find a direct correlation between the financial contributions of sons and their minor role in personal care, it is nonetheless

important to note that the traditional Chinese role of nourishment expected for sons and the tending role which was expected upon daughters and daughter-in-laws have somehow been prevailed. In other words, despite the improvement in the economic status of Chinese women, sons are still in an economically more superior position than their female counterparts in the family. Thus, sons are continued to be regarded as the main breadwinners of the family whose primary circle is in their economic or professional circles. By financially contributing to their elderly parents sons have reasonably fulfilled their responsibility of nourishment, and their helps in tending and other household maintenance are their own choices which can only be taken to mean further expression of filial piety. So the role of sons in taking care of the Chinese elderly reflects to a considerable extent that neolocality has not altered the fundamental distribution of labour in caring for the old people in the family.

In concluding this part of the discussion, several features in the division of caring responsibility need to be pointed out. First, the traditional role of daughters-in-law in taking care of the young and the old in the Chinese family has been weakened. This is particularly true in the aspect of personal care for their mothers-in-law. However, daughters-in-law are still predominantly the household managers, or they are the primary helpers in household maintenance for the old people. Secondly,

Chinese daughters, whether married or unmarried, have increasingly replaced the traditional role of the in-laws and have become the primary carers in tending for the old people. Thirdly, in the Chinese community like that in London where social circumstances of Chinese families are unique from Hong Kong, grandchildren have found to have filled in a significant care gap. Grandchildren are often the ambassadors of their parents who fill in the service gap in the areas of activities which their affective and obligatory compatibility allows. Forthly, the gender division of care in Chinese community is still found to be traditional. Sons fulfill their filial responsibility by means of making financial contributions to their parents, but have very minimal participation in personal care, which is essentially a female - daughters and daughter-in-laws - job. Finally, spouse, particularly female spouse, are also found to be active carers in the personal maintenance of the Chinese elderly people. In the next section I shall conclude with the analysis of the pattern of care as derived from the above analysis.

The Pattern of the Production of Care

As found in the London as well as the Hong Kong study, old people seeking help from their family members and the provision of care by the latter in return had shown several interesting patterns. In other words, from whom Chinese old people sought

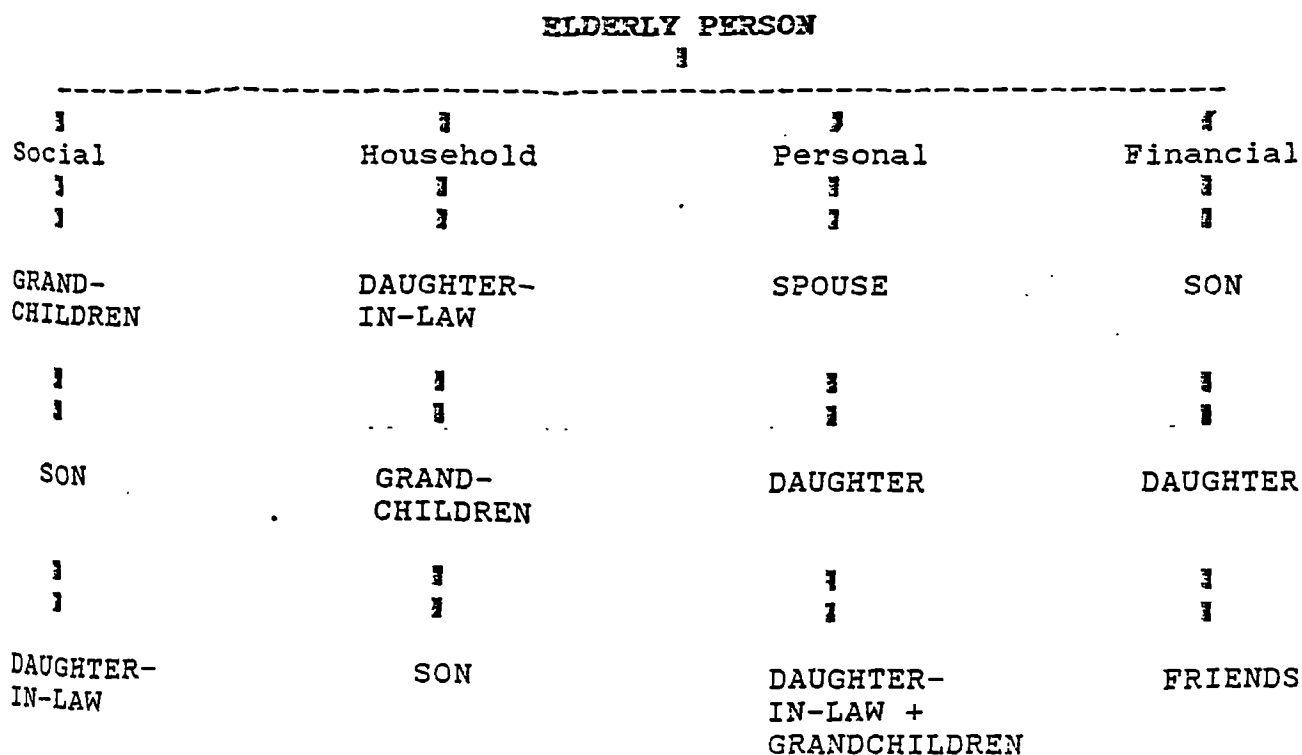
in regard to a certain sort of caring tasks and who were the ones in the family to provide assistance had formed or had been constructed into customary patterns to which old people and the carers largely conformed. As it was characteristic in the Chinese context for old people to mostly live with their married son and his family, and that the family living together with the old people was socially and normatively expected to take the primary care of the older parents, the pattern of care was found to be firstly associated with the living arrangements and the presence of the sons, daughters and in-laws. On the other hand, the pattern of care was also related to the nature of the caring tasks, which were, on one hand, stereotyped by gender of the old people and the carers, while on the other hand determined by the intimacy of relationship between the carers and the old people. So several important factors had come into play in the formation or construction of the pattern of care : the living arrangement of the old people; the presence of intimate relations and the nature of caring tasks which in different aspects affected the well being of the Chinese old people. Different combinations of the above three factors had created three central modes of care of the Chinese old people.

MODE ONE

The basic premise of this mode was a three generations vertically extended family of a patrilocal type. This kind of

household type was a resemblance of the traditional Chinese family of the ordinary people, and it was thus far one of the most common household types among Chinese families in London as well as in Hong Kong. The feature of this type of household was marked by a living arrangement whereby the elderly couple lived with the married son together with his wife and children. Usually in the case of London and Hong Kong, most old people had daughters living in the nearby districts. The following charts shows the pattern of care by different caring tasks under these social premises. Chart one represents the basic caring pattern of Chinese old people in London, and Chart Two is a modified pattern of Chart One which shows the caring pattern in Hong Kong.

CHART ONE



4

Several characteristics could be derived from this pattern of care of the Chinese old people. First, the spouse had become the first line helper in providing personal assistance to the old people who needed assistance, given that the health condition allowed. As I have argued above, providing help in such personal care activities as bathing, dressing up, using toilet required a close and intimate personal encounter because these are often defined by the old people as well as the helpers to be activities which belong to a very private and personal boundary. Old people and their helpers would only feel comfortable if personal care was backed by an affective as well as obligatory compatibility. These factors are nonetheless both subjective as well as objectively constructed. Notwithstanding the fact that the topic of social production of family will be discussed in the next chapter, what is important to notice here is that the spouse, when present, is always taken relatively comfortably as the one who gives out assistance in such tasks as related to personal care. This is true both to wives helping husbands as well as the vice versa. However, taking into account that Chinese women often enjoy longer life, the consequence has been found mostly to be the wives taking care of the husbands.

Secondly, under this pattern of living arrangements where the Chinese old people lived with the married son and his spouse and children, the daughter who lived around (when present) had taken over the traditional expected role of the daughter-in-law

in backing up the provision of personal care. This finding again supported the hypothesis that living arrangements, though an important factor attributing to the production of care by family, is less significant than the factor of affective as well as the obligatory compatibility suggested in the preceding analysis. In this regard, a daughter-in-law was only found to be the back-up helper assisting in some routine daily activities such as preparing meals and getting in and out of bed or a chair, despite the fact that she was the one who lived with the elderly person. Paralleled to the back-up role of the daughter-in-law is the assistance given by the grandchildren who had found to be less active in personal care when the spouse and the daughter of the old people who required help were active.

Thirdly, as far as the household managements and maintenance of the old people was concerned, it was the traditional expectations and role compliance of the housewife which prevailed. Daughters who belonged to another family rarely came in and gave a hand. If they did they would likely be greeted with resistance and apprehension because doing so would have subtly implied the failure of their in-laws, who were supposed to be the household managers of that family. So instead of having the daughter as second line helper, it was usually the grandchildren who lived with the elderly person to assist in the household tasks of the old people.

4

Fourthly, the role of the grandchildren was particularly outstanding in the help in social living. They were often the first line helper either directly approached by the old people, or offering assistance after receiving 'referrals' from their parents. The son was in the back-up, and helping in these activities was again a confirmation of the traditional Chinese male role who were the master in-charging of the external affairs.

Fifthly, the sons were found to be the main providers of financial assistance, irregards of the difference in the living arrangements. This finding was found to be more significant in the case of the London Chinese than their Hong Kong counterpart, as the economic status of Chinese women in Hong Kong had been far better off than their counterpart in London who were mostly engaged in the catering or takeaway business which the family (in other words the men) owned. Finally, as found both in London and Hong Kong, friends and relatives of the large extended family, e.g. neice and nephew, only played a marginal role in the production of care in all aspects of needs of the Chinese old people under study. The only exceptions was of Chinese elderly men in need of financial help. Friends would be approached when other sources of support had been exhausted.

The mode of care provision analysed above could be described as the basic pattern among Chinese old people in the two Chinese

communities being studied. Alteration of this basic mode exists only when the elderly person becomes widowed. Under this circumstance, the daughter was found to have replaced the spouse to be the primary helper, whereby the grandchildren and the daughter-in-law would become the major back up.

In the case of Hong Kong where the role of grandchildren is significantly less prevalent, formal help would often be called forth to take care of the old people. Alternatively, care would be purchased from the private source, for example, paying for someone to come part time to take care of the old people or simply to pay for private residential care. This pattern of care is particularly common in Hong Kong in the situations where both the husband and wife were employed outside the family. This is a pattern which is found very different between Chinese community in London and in Hong Kong. This modified form of the basic mode of care is shown in the chart 2 below :

CHART TWO

ELDERLY PERSON

1

1	1	1	1
Social	Household	Personal	Financial
1	1	1	1
1	1	1	1
GRAND-CHILDREN	DAUGHTER-IN-LAW	DAUGHTER	SON
1	1	1	1
1	1	1	1
SON	GRAND-CHILDREN	DAUGHTER-IN-LAW	DAUGHTER
1	1	1	1
1	1	1	1
DAUGHTER-IN-LAW	SON+ DAUGHTER	GRAND-CHILDREN (STATE SERVICE & PRIVATE CARE)*	FRIENDS

* (Situation of Hong Kong)

MODE TWO

This mode of care production is based on the social premise of a three generations vertically extended family of a neolocal type. In this type of family the living arrangement was that the elderly couple lived with the married daughter, her husband and their children. This type of living arrangement is increasingly acceptable in Chinese communities particularly Hong Kong, due not only to the fact that some elderly people have no sons, but

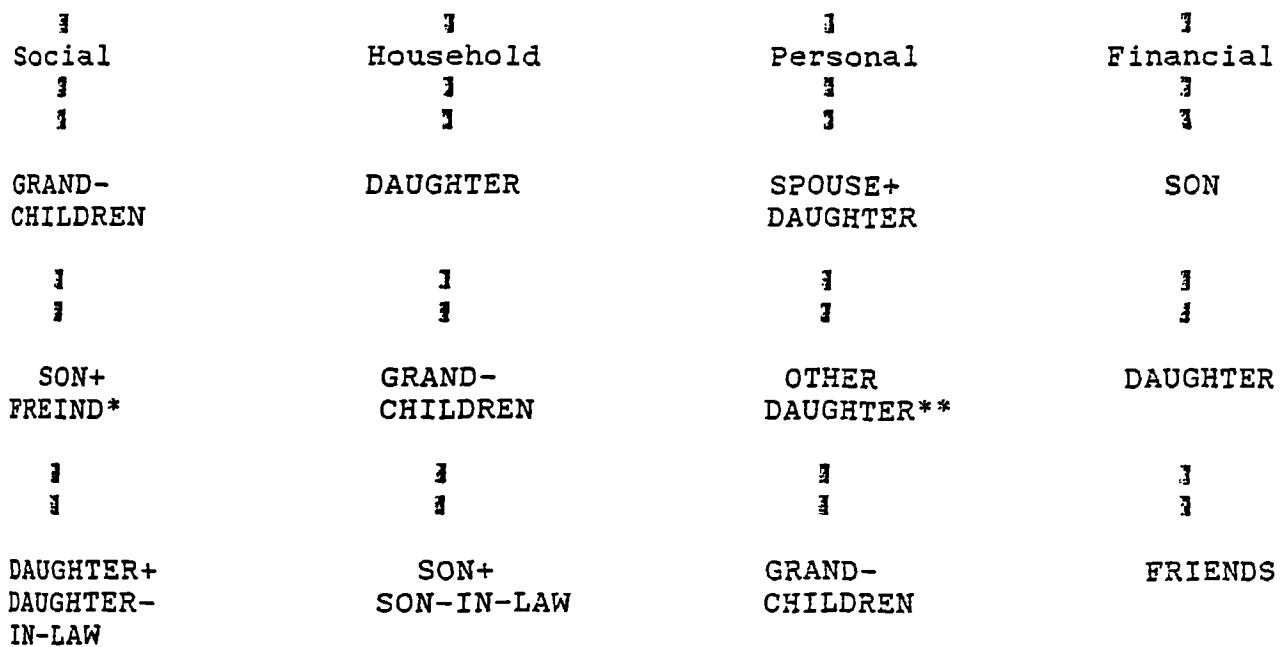
largely to the improved economic status of women.

Similar to the mode analysed above where the spouse has a central role to play in personal care, the provision of care in this mode has been found to be mainly centred at the daughter who lived with the old people. Unlike in the preceding mode where the daughter entered into the married son's family to offer personal care to the elderly mother, this was found very rarely the other way round. Instead, back-up help was mainly available within her own household, for example, from the grandchildren of the old person. In some circumstances especially in Hong Kong, a second daughter would be called forth as a back-up. As I have pointed out in the previous section, the sons-in-law have very minimal role to play where the sons are consistently the one who are the primary financial supporters. Chart 3 below gives a clear picture of this mode of care :

CHART THREE

ELDERLY PERSON

1



* In the situations of Hong Kong.

** In the Chinese community in London it was the grandchildren supported before the other daughters entered.

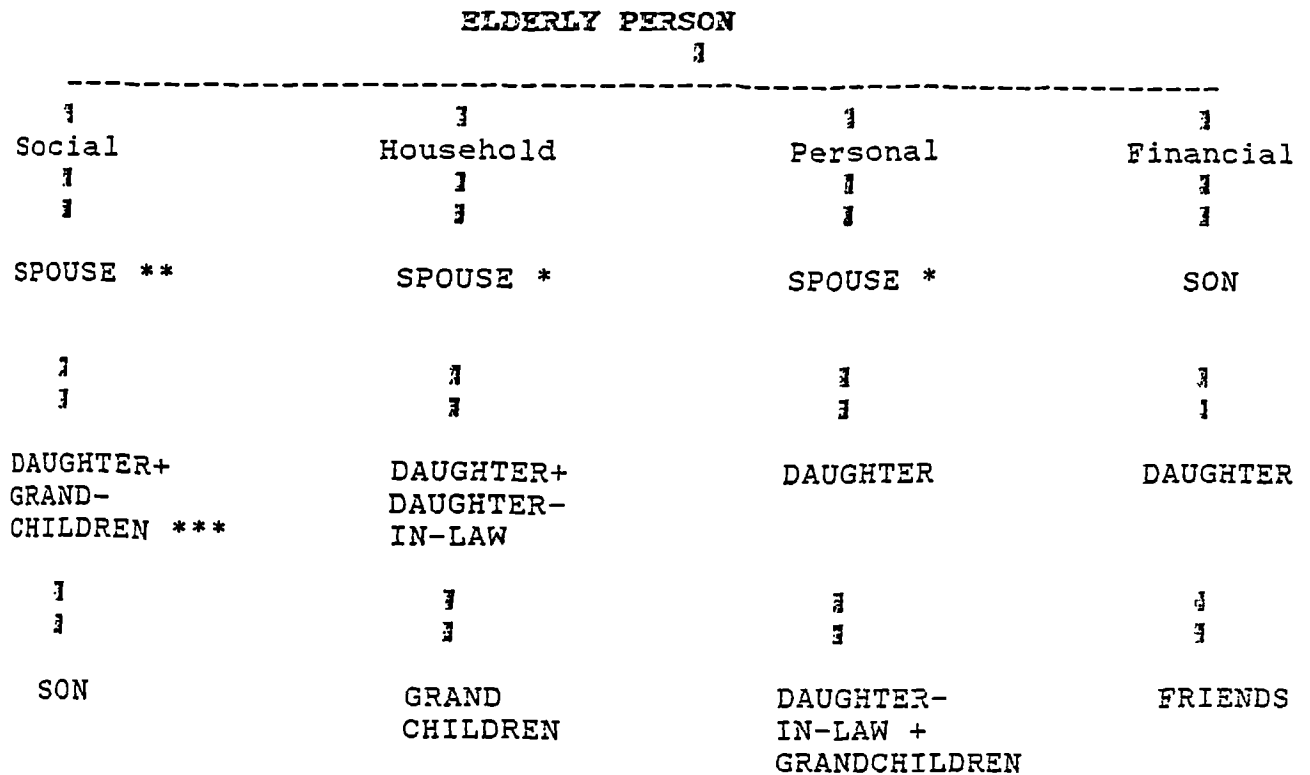
MODE THREE

The social premise underlying this mode of care is a family type which is marked by the one generation unextended living arrangement of the old people. Under this arrangement, the elderly couple lived on their own without living with any of their children, either out of choice or simply out of no choice. This is not a common living arrangement of the Chinese old

people, since it is still a normative expectation for the old to live with their children. In reality, it is quite rare for the Chinese old people not to live with their adult children, but this trend is more prevalent in London than in Hong Kong.

Under this arrangement, the spouse, when healthy and capable, was found to be the first line helper in almost all aspects of care, ranging from personal, household, as well as social, while the sons and daughters were expected to practise filial piety in nourishing them (financially). In the absence of the spouse, the daughters would enter and become the primary carer in personal as well as household care, while the daughter-in-law would be the active secondary helper who was there to represent the filial practice of the son. In the case of London, the grandchildren had become an important asset in filling the gaps where they existed, whether they be personal, household and social. But in the case of Hong Kong, the role of the grandchildren was only marginally supportive. This mode of care provision is illustrated in the following Chart 4 :

CHART FOUR



- * The daughter would enter in the absence of the spouse.
- ** In the situation of Hong Kong, the daughter or the daughter-in-law would take over in the absence of the spouse.
- *** In the situation of London Chinese, the grandchildren would take over in the absence of the spouse.

Before ending this chapter, several important findings need to be highlighted again. First, the majority of the Chinese people did not depend on the state for various aspects of care. Rather, the majority were caring for themselves to the farthest extent that they could maintain. Secondly, for those old people who could not take care of themselves, the vertical extended family was the primary source of problem solving as well as the

provision of care. In other words, it was the sons, the daughters, the daughters-in-law and the grandchildren who provided the major bulk of care. The horizontal extended family was only marginally involved in different aspects of care production. This finding demystified the common sense belief of the caring capacity and activity of the traditional Chinese extended family. Thirdly, Chinese daughters had gradually replaced the daughters-in-law in shouldering the primary responsibility of care, despite the fact that the latter were still the household managers in one particular type of household pattern analysed above. This finding also signified that certain divisions of caring responsibilities had undergone remarkable changes, yet at the end it was still the female being stereotyped as the primary carers, particularly in those aspects of care, such as personal tending and household management and maintenance, which were heavily gender biased. Fourthly, owing to a special social context in London, Chinese grandchildren tended to play a major role in the provision of care. Finally, the seeking and the provision of assistance had somehow formed into different modes owing to different social premises where the living arrangements of old people, the presence of intimate relations, the existence of the normative expectations as well as the creation and preservation of the social policy were important contributing factors. In the next chapter I shall focus the discussion on the social production and preservation of the family care in Chinese community.

CHAPTER EIGHT

THE SOCIAL PRODUCTION OF FAMILY CARE : A SOCIAL POLICY ASSESSMENT

This chapter considers the social production of family care for Chinese elderly people as observed in both London and in Hong Kong. I have already argued in Chapter 5 that the financial relationship between Chinese old people in London and Hong Kong was largely shaped by social policies in the two places. One of the typical examples was the traditional moral expectation of raising a son. The higher expectation for sons to support one's old age, as shown in Table 5.2, indicated how the lack of state financial support reinforced this traditional Chinese norm. The focal concern of this chapter, however, is the social processes by which informal care offered by the Chinese family members to elderly people are being preserved, strengthened and reinforced. It is argued that informal care in the Chinese context is not a new creation, but rather a discourse which has continually been reproduced through social policies and state interventions and, thus, the suggestion that care is an intrinsic character of the Chinese family is largely incorrect. Since the majority of the Chinese old people who live in London today were immigrants from Hong Kong during the seventies, and most of them were either natives of Hong Kong or exiles from Mainland China soon after the Japanese invasion and the Communist revolution in the thirties and forties and who had been settled in the colony for the most significant part of their lives before immigrating to Britain,

the policies and interventions of the colonial government had important relevance for this group of old people as well as their counterparts in Hong Kong. The first part of this chapter is a brief examination about the emergence and development of social policy for the care of old people in Hong Kong. The main part of the chapter which follows subsequently is an analysis of the distinctive features of social policy and state intervention which have significant bearings on the reproduction of informal care by the Chinese family in the two places.

The Prevalence of Informal and Voluntary Care (1945-1965)

Social welfare for old people in Hong Kong was almost non-existent before the mid-sixties. This certainly had to do with the mentality of traditional colonial rule. But more importantly the economic status of the island at that time and the unsettled and mobile populace had made planning almost impossible. It has been recorded by Lau and Kuan (1988) that people just came and went between the Mainland and Hong Kong without having a definite plan of settling down in the colony. Because of the unstable social and economic prospects, Hong Kong was only regarded as a place for making money for traders, and one where ordinary people might earn a living at times of political turmoil in their motherland. It has been well documented by Chow (1986, 1990) and Tao (1981) that Hong Kong had not been a place for old people to settle, and the aged population (aged 60 and over) only formed

around 5% of the total populace in the sixties and probably less before. In view of the relatively small number of elderly people living in the colony, the government had established for itself a legitimate reason for not putting the care for the old people as a top priority.

Nevertheless, alongside the non-intervention of the colonial government, the traditional voluntary sector of elderly care continued to be active. The typical example was the 'Chai Tongs' (which literally means vegetarian halls) which were virtually Taoist temples where accommodation was provided for the old people (Yuen, 1966). Residents of these 'Chai Tongs' were mainly single or widowed, but there were also elderly men who wanted to spend their retirement in this kind of religious environment. These 'Chai Tongs' were operated on religious (Taoist) principles which stressed the traditional Chinese philanthropic spirit of charitable giving when one was able to do so (Chow, 1984, p.185). Besides the provision of accommodation, the 'Chai Tongs' also provided vegetarian meals for the old people; created a setting for collective Taoist worships, as well as provided funeral services when the old person died (Ng, 1989). In other words, the 'Chai Tongs' emerged and developed into a kind of voluntary care for old people.

Despite the fact that the 'Chai Tongs' did emerge, they did not mushroom as might have been expected. Because of its

charitable nature, entering into these places inevitably carried a heavy sense of stigma which many old people would avoid given there was a genuine choice facing them. Looking from the supply side, although there had always been traditional Chinese teaching for the rich to be involved in philanthropic work, resources injected into this and other kind of charity had been quite limited. As a consequence, this item of voluntary elderly care ended up catering purely for a selective category of old people : those without a family -- spinsters, widows without children, and a minority of divorcees (Ng, 1989). The sheer number of 'Chai Tongs' did reflect to a large extent the fact that the family was still the basic and primary unit which cared for old people and other dependents.

Apart from the voluntary service of the 'chai tongs', old people were also engaged in mutual financial assistance by means of the 'Pak Kam Wui', which literally meant 'mutual aid clubs for burial expenses'. These clubs, which usually consisted of around ten to twenty persons, were mainly formed by traditional philanthropic organisations. Members usually made monthly contributions to the club but the amounts were irregular, depending on the number of deaths in a particular month. The scope and functions of these 'Pak Kam Wui' was later extended to cover financial needs of the old people and the family during contingencies. The operation of the extended 'Pak Kam Wui' was more flexible : they might not necessarily be formed by

philanthropic organisations, but would instead be formed by people associated in the neighbourhood or in the workplace under the initiative of an organiser. So the 'Pak Kam Wui' or its extended form could be understood as an informal initiative in catering for the financial needs of the family as well as the old people in particular.

Besides the efforts of the indigenous philanthropic groups, provision for the elderly was also brought into the colony by the religious bodies associated mainly with the Catholic and protestant churches. For example, the first home for the aged was established by the protestant church in 1918, while five years later the second home was established by the Catholic church (Choi, 1982). The fundamental rationale for running aged homes at that time was not to counter family care. Instead, it was quite in line with the philanthropic attitude that those who had the blessing of having children should be taken care of by the family, while these institutions were simply places for the unfortunate who had no children that they could rely on.

It is apparent indeed that the bulk of care provided for the elderly during the first century of British rule, whether they be physical or financial and spiritual or funereal, were mainly in the realms of the informal and the voluntary sectors. However, it is hardly justifiable to conclude that the then colonial government, though not providing direct services at all, was

aimless in this regard. Instead, the arena for government intervention had been carefully designed so as to sustain the operation of the informal and voluntary sector. This principle of governance has been termed 'non-interventionism' by some academics (Lau & Kuan, 1988). However, whether the state was really free from intervention into the sphere of the family is an open question. As far as the subject of the family is concerned, the intention and activity of the state in intervention was obvious, though paradoxically the intervention was required to prevent further interventions. This principle of welfare had been observed by the colonial government in the pre-welfare years and had become one of the most important guiding principles in the subsequent welfare era in Hong Kong. This principle was clearly recorded in the annual report of the Social Welfare Office (1955-56) which stated unequivocally that the family should shoulder the prime responsibility of caring for their elderly members. In this respect, the government's role was only a peripheral one which concentrated on the care of the minority who had no family on which to rely (Civil Affairs Department Annual Report, 1955-56, also recorded in Chow, 1985, p.134).

In sum, the characteristic of the care of elderly people during the period of British colonial rule in Hong Kong before 1965 was marked by the primary responsibility of the family in providing care. This was, nonetheless, reinforced by the reluctant interventionism of the government coupled with the

support of the traditional and indigenous philanthropic organisations as well as the western churches. However, in view of the limited provision mainly in institutional care, the major bulk of care was tacitly shouldered by the Chinese family.

The Development of Residual Welfare (1965-1976) --
The Support of Family Care

Formal social welfare for society at large and for the elderly people in particular did not actually start until 1960's, after the colony had received an unexpected influx of immigrants from Mainland China during the 1950's. Faced with this sudden disruption of the status quo, the problems of poor housing, lack of hygiene as well as of social control had all come to the surface, and the government could hardly escape from taking action, albeit with extremely minimal provisions. The first White Paper on Social Welfare was published in 1965 which explained the government's plan in developing social welfare in the years to come. The feature of this White Paper was three-fold. First, care of the old and the dependents was a primary responsibility of the family; secondly, social welfare was almost totally residual in nature; and thirdly, the scope of social welfare was only narrowly conceived. I shall discuss each of these features separately below.

As far as the assumption of the caring as well as the problem solving functions of the Chinese family was concerned,

the first White Paper spelt out very clearly that :

"[I]t is of the greatest importance that social welfare services should not be organised in such a way as to make it easier for socially disruptive influences to gain a hold over the community, or to accelerate the breakdown of the natural or traditional sense of responsibility - for example by encouraging the natural family unit to shed on to social welfare agencies, public or private, its moral responsibility to care for the aged or infirm" (Hong Kong Government, 1965, p.5)

Besides, the government's intention to preserve the traditional functions of the Chinese family was also obvious :

"...in Chinese tradition, social welfare measures which individuals may need on account of poverty, delinquency, infirmity, natural disaster and so on are regarded as personal matters which at least in theory ought to be dealt with by the family (if necessary the extended family). It is clearly desirable, on social as well as economic grounds, to do everything possible in Hong Kong to support and strengthen this sense of family responsibility (Hong Kong Government, 1965, p.6).

Owing to the colonial government's commitment to the promotion of economic growth as the primary social objective, social welfare was developed along a remedial and purely residual direction. Remedial social work services were developed aiming at correcting the 'malfunctioning' of family members as well as

strengthening the proper functioning of the 'family as a whole'. This could be seen by the fast expansion of family service centres which provided 'preventive' as well as 'corrective' counselling service to clients, teaching and equipping them with proper familial role performance and supporting the "inadequacy" of the clients who could not perform their expected function well. Understandably remedial social work services became the mainstream of welfare development in this period.

As far as financial support to the needy was concerned, social welfare developments in that stage were also purely residual. Although in the absence of any kind of pension scheme a public assistance programme was brought into place, it was avowed however that public assistance was only designed to provide bare subsistence for those who could not manage to help themselves, and essentially those for who the family and extended familial networks failed to be of help. In addition, as I have argued in Chapter 5, the meagre amount of assistance and the complicated procedures of the means-test coupled with the social stigma it adhered had served to discourage people from using it.

As a matter of fact, the adoption of means-tests was not confined within the scope of public assistance, they had been extended to the public housing and education. For example, families must pass a means-test in order to be eligible for

application for public housing; and secondary school pupils also needed to get through a means-test so as to be given exemption from fees. The extension of the residual spirit had not only created stigma. But more importantly, the state had penetrated into the moral domain of the civil society and shaped the concept of deserving and non deserving, and thus had regulated the help seeking behaviour of the society. This argument of state penetration and regulation will be expanded in the next section.

The third feature of welfare development in Hong Kong was its narrow conception of welfare. Welfare, according to the White Paper, was very little beyond personal social services. There was no comprehensive plan to include housing, health as well as education into the welfare jurisdiction. By so doing, it not only created service fragmentation but, more importantly, the concept of welfare in civil society was defined and shaped to resemble the traditional concept of charity, with the concept of welfare rights being suppressed obviously.

In sum, the first welfare White Paper had laid down a residual and remedial foundation for social welfare in Hong Kong. This was later found to be a rock-solid foundation which had somehow prescribed the welfare development in the colony in the subsequent years. Moreover, the philosophy and practice behind this White Paper had also served to preserve the assumed functioning the Chinese family.

Quasi-Institutionalisation of Welfare and the
Preservation of Family Functions

This period of welfare development had been well known in Hong Kong as the "MacLehose Era", during which larger scale welfare development plans had taken place. Lord MacLehose, the then governor of the colony, committed himself publicly in his first address to the Legislative Council to the development of a public housing plan which would provide decent housing for all who had a need (The Annual Address of the Governor, 1972). Medical and health services were also to expand, aiming at increasing the number of beds per thousand population from 3.8 to 5.5, so that the standard of medical service to the Hong Kong citizen would be greatly improved. In the area of education, it was in this period that nine years compulsory and free education was first provided, and there were also increased opportunities for post-secondary and university education for the young school leavers, despite that the ratio of those who had received higher education was still considerably lower than the western societies such as Britain. This was evidenced by the fact that the proportion of population who had received university education rose by 1% in 1961 to only 3% in 1981 (Luk & Wu, 1983).

As far as social welfare was concerned, the year 1977 was also an important watershed. It was in that year that three different welfare Green Papers (Elderly Service, Personal Social

Work Among Young People, as well as the Services for the Disabled) were published for public consultation.

While there were large scale expansions in nearly all aspects of social welfare services in the mid-1970's, the residual welfare philosophy had not been changed. This was shown by the fact that the principles and operation of the public assistance, which was the core of the social security programme in Hong Kong, had remained unchanged despite its substantiation by a package of non-mean-tested provisions (such as the Old Age Allowance and the Disability Allowance). Besides, public housing remained a means-tested service, and there was a further residualising trend of social services in the 1980's. This was done mainly by means of privatising as well as marketising social service.

It is important to note that the large scale expansion of welfare had not contradicted the fundamental assumption of the responsibility of the Chinese family. As far as the care of Chinese old people was concerned, the family was still regarded as the keystone upon which other services were built. As documented by the green paper on elderly service (1977), the government's role was only to take care of those who could not manage because of "social changes" :

"Chinese society has a traditional healthy respect for old people. The

Chinese family remains a tightly knit one and a majority of old people are cared for by their families. However, social changes and other pressures on the family units are compelling old people to rely on Government for a greater measure of support than was necessary hitherto..." (Hong Kong Government, 1977, p.1)

Several important points must be noted. First, a psychosocial approach was adopted to explain the problems of old people. In other words, problems faced by the old people were still regarded as a result of individual and family failure, but it was, for the first time, recognised that pressures coming from "social changes" had contributed to the cause of this failure. It was upon this recognition of social pressure that the government committed itself to the provision of public services for the old people. However, it was doubtless the case that the family was still regarded as the primary and basic unit by which old people were to be taken care of. As stated clearly in the Green Paper :

"....the provision of services which will act [only] as support or reinforcement to the family when it is faced with the strain of looking after an elderly member" (Hong Kong Government, 1977, p.3).

Secondly, the needs of some old people were, also for the first time, differentiated from the the needs of the family. In other words, some old people may have their own individual needs

despite the presence of their nuclear or extended family. For example, the establishment of social centres for the elderly was a recognition of the social needs of the old people themselves, and the increase of residential provisions of also a similar recognition. However, this is far from a fundamental change of caring liability -- from family to the state. On the contrary, some old people were identified and classified as "vulnerable" who needed support from the general public. In other words, it would only be the "vulnerables" whose needs deserved to be met outside the family. This practice could be explained as a new version of the English Poor Law where the poor had been classified as deserving and undeserving, and had, in effect, created further stigma for the old people who had to use social services. In the case of Chinese old people, who were the "vulnerables" ? According to the Policy Paper (1977), it was mainly those who lived alone (assumably without a family). This idea of vulnerability was further substantiated in a recent Report of the Central Committee on Services for the Elderly (1988), where several categories of old people were classified as vulnerable or "at risk", and at the top of the list, it was also those who lived alone. In other words, despite the fact that some services were developed for the need of old people without the support of the family, the moral stigma which related the undeserving to the failure of the family had created a result which was consistent with the fundamental philosophy of the welfare spirit perpetuated by the state.

As a matter of fact, what was underlying the welfare era, despite expansions in different facets, was still a reluctant interventionistic philosophy which strove to uphold and strengthen, apparently unselectively, the traditional function of the family. Nevertheless, in the process of doing so, the social and economic pressures which the Chinese family faced were impossible to ignore. What were these social and economic pressures that the Chinese family faced ?

Social Pressure Faced by the Chinese Family

In the light of urban redevelopment and in conjunction with the need to house a great number of cheaply paid people whose purchasing ability had made it very difficult to have their housing needs satisfied in the private housing market, the government developed a large scale public housing scheme in the 1970's, which was based on its sporadic resettled housing programme in the 1950's and the 1960's.

As a matter of fact, the massive scale of public housing development took place in the 1970's which, by the end of that decade, had almost accommodated 50% of the Hong Kong residents (Hong Kong Government, 1981; Lee, 1981). Because of government policy to develop urban land into expensive commercial as well as private residential properties, and also because of the fact that lands in the rural part of the colony (New Territories) were

significantly cheaper, families which were in the public housing waiting list were greatly attracted to move into public housing in the New Territories. Owing to the reasons specified above, public housing estates were overwhelmingly developed in the new territories, following the idea of "new towns" which later proved to be a total failure because of the difficulty in providing employment opportunities. Nevertheless, the massive public housing estates developed in the new towns (such as Tun Mun which is about 25 miles from the urban centre) had created a vast number of new town resettlers. This new town migration trend was further aggravated by the allocation policy of the Housing Authority. According to the working principle of the Housing Authority, those families who were willing to move into the New Territories could be allocated a housing unit within three years, while those waiting for allocation in the urban area might have to wait for a period of up to twelve years (Yu, 1990).

This practice of public housing allocation had helped to promote a massive internal population migration towards the new towns in the New Territories. The statistics of the government showed that 47% of the public housing residents lived in the New Territories, while only 11% lived in Hong Kong Island. As an immediate result, the traditional family and relatives networks had been placed under tremendous pressure. For example, siblings would have moved into different estates in different parts of the New Territories while the parents might lived in Kowloon or Hong

Kong Island. On the other hand, due to the resettlement policy, some families who lived in close proximity to each other might have been resettled in different housing estates or even in different new towns, and thus would have also lost the closeness of physical proximity (Lee, 1981). So despite the government's intention to preserve the traditional welfare spirit and family traditions in Hong Kong, public housing development had inevitably put the traditional welfare networks (such as the "Pak Kam Wui" which based on long term traditional neighbourhood) under tremendous pressure.

Secondly, alongside the rapidly industrialising economy, there was always a great demand for labour. Hence, not only that the traditional role of men as breadwinners was strongly upheld, the idea that women should not be restricted in the arena of household work was also beginning to develop. Unlike the traditional Chinese ideal that a virtuous woman should be unknowledgeable, this ideal was twisted so as to support the supremacy of economic purpose. Hence, it was held that a virtuous woman in modern Hong Kong should be able to work successfully both in her own professional career as well as in her own family. In other words, in supporting the supreme goal of economic growth, the virtues of women were redefined, but the outcome was an additional role on top of the previously held one. So the pressure of the dual roles of women in Western society was also prevalent among Chinese women in Hong Kong. Looking from the

point of view that the traditional domain of Chinese women was only restricted in the family, this seemed to have marked a sharp change of women's position in the society. It is by having a larger degree of economic independence, Chinese women have begun to raise their social status from almost being a property of their husbands' family to having more freedom and autonomy. However, this expansion of Chinese women's domain did not really lead to a new definition of women's role, nor did it lead to a new morality which supported a redistribution of caring responsibilities. On the other hand, working women were still expected and were reinforced both by moral sanctions and social policy to perform the caring and other female roles in the family (The Hong Kong Association of the Advancement of Feminism, 1990).

In sum, the welfare era in Hong Kong was characterised by a broad expansion of welfare services. However, this expansion was by no means a signal that the state was taking over the responsibility of the Chinese family in caring for its older members. It was also not a trend towards the institutionalisation of social welfare. Rather the expansion in the scale of services was only to meet the basic needs of the Chinese families which were under social and economic pressure. The family function was still upheld, while in practice women were faced with additional pressure. The rationale of the government in the expansion of service scale was still to support rather than to replace the family.

Privatisation of Social Service : A Current Trend

The current experience of social services in Hong Kong is the privatisation and the dismantling of government departments. By introducing market principles into the rationing of social services and the allocation of social service resources, individual morality such as that of self reliance and self responsibility are being re-emphasized. The market operation principles being adopted include the pricing of social services according to demand and supply; the measurement of efficiency; the promotion of the notion of "free choice" in service consumption; the correlation between purchasing power and quality of service; and the emphasis on the affordability of consumers and the cost recovery of the providers rather than the satisfaction of needs. Social services, in this sense, are made to become social goods which are very similar to commodities in the market.

There are two typical examples showing the marketisation and commercialisation trend of social services which has prevailed since the mid-1980's. The first example is the medical and health services and the second is welfare provision for the elderly. As far as the medical and health services are concerned, the affordability or the purchasing power of the patients and families has been used to replace needs as the basis for the rationing of resources. In this regard, hospital charges

has become cost related, meaning that patients must pay a certain proportion of the service cost. As a result, those who could afford to pay more can enjoy better quality of hospital service, for example, in terms of better nursing care, less overcrowded ward, and possibly better drugs and medicine. Owing to this rationing principle, hospital services have become quasi-commercialised, although profit making has not been adopted as an explicit goal.

As for the welfare provisions for the old people (*as well as* the disabled), the idea of fee charging was also emphasized, using the same principle again that those who could afford should pay more, no matter whether the outcome was to exchange for a better quality of service.

The privatisation of social services in Hong Kong in the 1980's had crudely reverted welfare ideology back to the 1960's where personal responsibility and self reliance were strongly emphasized. It is not purely a matter of residualisation, or in the case of Hong Kong, of de-institutionalisation of welfare, but rather, like the advocacy of the New Right, a re-moralisation of the individuals and families. In sum, privatisation of social services in Hong Kong was not a complete deviation from the colonial welfare tradition. Despite the fact that it has in effect halted the quasi-institutionalisation trend, it has virtually reproduced the welfare tradition of the pre-welfare era

in the 1960's and has crudely reinforced the ideology of the Chinese family and that of self care and problem solving responsibility.

Putting it in a nutshell, social welfare development in Hong Kong, no matter how grand the scale of development it appears to be, has all along been supporting the central ideology of sustaining and reproducing the caring function of the Chinese family. Although the reproduction takes different forms in different stages of welfare development, this is nonetheless true when the informal sector was originally active; was of no exception in the early development of welfare; had not been overturned when the family was under pressure; and has been crudely reinforced in the pre-Chinese rule in 1997. In the following section I shall discuss how the reproduction of family functions was carried out.

The Social Production of Family Care

There are three major means by which the caring and problem solving functions of the Chinese family were produced and sustained in Hong Kong. First, the regulation of individual and family morality; secondly, by the shaping of the help seeking behaviour ; and thirdly, by the sanctioning of the provision of family care.

Throughout the post-war years, positive non-intervention has been used by the colonial government as a motto to protect the vested interests and to avoid public criticisms. Positive non-intervention has successfully been portrayed as the cornerstone to the economic success of the colony in the past forty years. However, notwithstanding this image of the government, it is important to point out that the thesis of non-interventionism in Hong Kong was little more than rhetoric. The government in Hong Kong has, by various measures, intervened into the moral domain of the civil society. This myth of the family as a private domain has been pinpointed by Land and Parker (1978), Donzelot (1979) and Walker (1982, 1989), who similarly argued that the family in western societies has been a longstanding object of both direct and indirect state intervention. State intervention in the family could be overt by means of the coercion through state legislation of certain family life and family care practice, for example, prosecution for the neglect of children in Britain (Walker, 1989); prosecution for not sending children to school under the Compulsory Education Legislation in Hong Kong; and the prosecution for the abandonment of elderly parents in the PRC.

In the Chinese context, there may be an obvious tradition for the use of overt coercion by the state. According to Lau and Kuan (1988), the traditional Empire State was often expected to set up and to enforce the societal standard of morality. And the

examples of direct coercion of the state to enforce family morality such as divorce, desertion and abandonment were easily seen in Chinese history. Moreover, this traditional expectation towards the state as a moral control agent has also been transferred to the present government in Hong Kong. In a recent study, Lau and Kuan (1988) found that 77.1% of the respondents agreed or strongly agreed that the government should enact a law to punish those children who failed to take care of their elderly parents. Likewise, great majority (85.9%) agreed or strongly agreed that the government should enact a law to force people to take care of their elderly parents. Nevertheless, the expectations of the Chinese towards the state has not always been consistent. Gray (1979) observed that there is a combined readiness of the Chinese to appeal to the government to intervene in any aspect of life in order to protect his own interest, and with a fierce resentment of government interference when applied to himself. This ambivalence has become the main factor causing resistance against state coercion.

Apart from the overt form of state coercion, state intervention could more often be in a covert form, quietly reproducing the caring functions of the family and supporting the ideology of familism. As pointed out by Moroney :

"By presenting (existing patterns of responsibility and dependencies and the division of labour) as 'normal' or 'natural', the state supports and

sustains these relationships without appearing intrusive, thus preserving the illusion that the family is a private domain" (Quoted in Walker, 1989, p.15).

In the Chinese context, the government has attempted to define the basic moral principle of personal duty in solving one's own problems and meeting one's own needs. The state has further defined the scope of family responsibility in caring as well as in problem solving. Through the provision of social services, the state has further strengthened this moral practice by shaping help seeking behaviour and by rewarding and sanctioning individuals and families which failed to comply. More importantly, it is through this process that the reproduction of family ideology has taken place. As pointed out by Walker (1989) and Dalley (1988), the hegemony of family ideology is also established and internalised by family members. As a result, not only is a normative expectation towards the family formed, but more importantly the help seeking and *producing behaviour* is also shaped and patterned. Guilt and stigma would be created for those who failed to comply, no matter whether they are help seekers or help providers.

Nevertheless, to point out the state penetration and reproduction of morality does not imply the passivity of the civil society. As far as the Chinese is concerned, Tao (1990) argued that the concept of self reliance and self sufficiency in welfare was related to the deep-rooted Confucian tradition, which

emphasized the self as a bearer of roles rather than the self as a bearer of rights. Accordingly, the Chinese self was a relational being which was to be conceived primarily in the familial network. Caring for the dependents, according to Tao, was a fulfilment of one's duty which was learned from within the family (Tao, 1990, pp. 26-28). This helps to explain why the Chinese received the penetration of the state in reproducing the morality of the family and in defining the scope of welfare in the society. However, as I have argued earlier in Chapter 1, the internalisation of the Confucian ideology was not a purely autonomous activity of the civil society. It had, rather, a historical association with the gentry class and was used as a kind of ruling ideology. In the following section, I shall examine the measures of the state by which the caring and problem solving function of the Chinese family was being upheld and the inter-personal relationship within and outside the family concerning the giving and reception of help was being shaped and reproduced.

Regulating the Morality of the Family

The strategy of the state in intervening in the morality of the individuals and family in the context of Hong Kong was found to be of multi-faceted. First, there was the individualisation and personalisation of problems and the privatisation of needs which functioned to mould the sense of personal duty in problem

solving. The first welfare white paper in 1965 had delineated from the outset that such problems related to poverty, care of the disabled and the aged were regarded to be personal and private (Hong Kong Government, 1965). By denying the structural causes, problems and needs were thus privatised and personalised, and family as the keystone of the civil society were 'naturally' given this responsibility. Hence, by divorcing problems and needs between the private and the public, not only could the government disguise its own involvements, but more importantly problems and needs were thus contained within the boundary of the private sphere.

This kind of regulation of family morality was also as salient in Britain as in Hong Kong. In the process of dismantling the welfare state, the need of a strong family was emphasized to be of utmost importance by the Neo-Liberals. As argued by Johnson (1982),

"[t]he Ideal Society rests upon the tripod of a strong family, a voluntary church, and a liberal minimum state. The family is the most important leg of this tripod" (Quoted in Fitzgerald, 1983, p.47).

Indeed, similar to the situation of Hong Kong in this respect, the British state was no longer regarded to be the agent which calculated the social needs of the nation (Fitzgerald, 1983), but it was the family which must be responsible for

solving the problems and satisfying the needs of its members.

"... the more society can be policed by the family ... and less by the state, the more likely it is that such a society will be both orderly and liberal." (Johnson, 1982; Quoted in Fitzgerald, 1983, p.47)

In addition to the above, the family functions in caring and problem solving in Britain were also 'protected' by the state. Since the family was viewed as a private but fragile institution, the state must help to counteract any destructive forces in the society which were likely to harm the 'natural' and 'normal' functions of the family. However, as pointed out by Land and Parker (1978, p.332)

"[o]n examination, what is being protected are particular patterns of responsibilities and dependencies within the family and a long established division of labour between the sexes and between generations."

As a matter of fact, examples showing the state's definition of the boundary of care by the family can be seen in different stage of welfare development in Hong Kong. In principle, social welfare was designed from the outset to satisfy only a limited set of needs. Services to meet needs, for example, with regard to poverty and the care of old people were either not provided at all, or only provided on an extremely low

level. Means tests as well as other harsh procedures and stigma attached to the application of services had, to a considerable extent, made welfare services in Hong Kong very similar to traditional Chinese charity. The social and moral stigma adhered to the charity receivers were also applied to social welfare recipients without exception. This was the first and important measure adopted by the state to reinforce the individual and family responsibility and to deter the relinquishment of personal responsibility.

The public assistance scheme which started operation in 1971 was a typical example to show how this intervention took place. In the process of reinforcing the assumption that poverty was basically a personal matter which was to be dealt with by one's family, the P.A. scheme had denied the eligibility of individual family members to apply for assistance. According to the operational principles, individuals in needs of assistance would not be considered unless the family as a whole expressed that need. However, the expression of the need of the 'family as a whole' had to be represented by the male family head. In other words, through recognising the family as the only legitimate unit by which needs would be entertained, the sovereignty of the family in problem solving and in meeting needs were being upheld, and moreover, the traditional Chinese gender division of power and responsibility were sustained. Examples in Britain illustrating this reinforcement of gender roles in care within

the family had also been prevalent. This topic will however be dealt with in the next section on the shaping of family care.

As far as the care of old people was concerned, the "private" responsibility of the family had also been strengthened by means of personalising problems and privatising needs. Take housing for instance, the public housing policy in Hong Kong had excluded the eligibility of the single person for the application of public housing. By so doing, the nuclear and vertically extended type of household was obviously favoured in the public housing allocation. As far as married couples were concerned, public housing in Hong Kong also favoured those who had children. Childless couples, on the other hand, were assumed to have their housing needs fulfilled in the private market. As pointed out by Wong (1974), most public housing cubicles in Hong Kong were purpose-built for families of 4 to 11 members. In other words, large families or even three generational households were encouraged under the spirit of promoting 'the family-as-a-whole'.

This aspect of public housing policy in Hong Kong was comparable to that of the British counterpart where families were given top priority in the allocation of council houses, although obviously three generational households had not been encouraged.

"The government's first objective is to afford a separate dwelling for every family which desires to have one."
(Ministry of Reconstruction, Housing, Cmnd, 6609, HMSO, 1945; Quoted in Land and Parker, 1978, p.350)

In addition to giving priority to the family, public housing policy in Hong Kong also encouraged elderly people to live with their children and their family. This living arrangement was rewarded by the government's introduction of the 'Elderly Persons Priority Scheme' in public housing allocation (Hong Kong Housing Authority, 1989, Para 2.5 & 2.6). According to this scheme, "families awaiting rehousing along with elderly parents would have their housing allocation advanced by 2 years, provided that they had been registered on the waiting list for not less than 2 years" (Ibid). This policy, according to the government, was derived from the belief that an elderly person felt best in his own home and in the company of family members, and that family members can provide the best care for elderly people (Hong Kong Government, 1982).

This practice has served as a positive token to reinforce the family as the most fundamental and legitimate unit in satisfying the housing needs of their old people. Apparently, the positive discrimination favouring a certain kind of residential pattern of Chinese old people and the penalisation of the 'deviants' had a strong educational effect whereby the moral

expectations towards the family and the state were shaped and regulated through an internalisation process of the family members.

As for the other services for the old people, such as home help services, the reinforcement of family responsibility was done by rather subtle means through the operation of the double-bind. In short, although the service was in principle designed for all families in need, the serious shortfall had actually made it popularly known that those who lived with children and family would not have a chance of getting the service. This is demonstrated by the fact that there were only 35 home help teams throughout the colony in 1985, and there was an increase of only 9 teams in the following two years. In the year 1987, there was a shortfall of 204 home help teams in Hong Kong (Social Welfare Department, 1984; 1987).

This dichotomy between the principle and the practice of home help service in Hong Kong was, without exception, strengthened by moral stigma which classified old people into 'vulnerable' and 'high risk' whereby those without children and family had been ranked top of the vulnerability list (Secretary for Health and Welfare, 1988). The message underlying this policy was nonetheless clear : whenever a family is available, it was unquestionably the most proper unit in society, both socially and morally, by which care of the old people was to be

provided. Superficially, the spirit underlying the home help service in Hong Kong seemed to contradict the public housing policy, which encouraged old people to live with their adult children and their family. But in face of the serious housing shortage and the strong moral stigma, there was a compound effect which encouraged the old people to stay with family and at the same time required the family to take primary care of them.

On the other hand, inspite of the fact that council housing policy in Britain tended to discourage three generational living arrangements, the fact that home help service was a means to shape the morality of the family and the care of elderly relatives could also be seen. Moroney (1976, p.56) observed that

"elderly people living alone or with their spouses are much more likely to be provided with state help. If the elderly is living with relatives, especially children ... service is withheld on the assumption that the family will provide the needed care."

This observation was based on the findings of a survey of Hunt (1970) who found that only 2.2% of the home help recipients were living with their children, and those who were refused of home help application were those who lived with children who were usually daughters. Hunt's findings were also confirmed by Rees (1976, p.89) who found that home help was not normally granted if the applicant had a daughter living within the boundary of the county borough.

In sum, it could be seen that a largely paradoxical relationship has been established between the state and the family. On one hand, the state dominated the civil society and the family in particular and, in effect, it defined the moral domain of the family as well as shaped and regulated its moral and legitimate functions by means of social and moral rewards and sanctions. On the other hand, however, a wide demarcation between the state (the public) and the family (the private) was created to support the state domination (Ungerson, 1990, pp.10-13). In this regard, the family was, as both seen in Hong Kong and Britain, viewed and construed as the 'last refuge' against the harsh public world, and it was this refuge which functioned to protect and to take care of its elderly members (Land and Parker, 1978; Fitzgerald, 1983). In the Chinese context, the demarcation between the state and the family had been accepted as a contractual arrangement that both parties were ready to conform. As observed by Lau and Kuan (1988, p.27),

"...the mere fact that this distinction has been made and popularly recognised for such a long time gives it some sort of 'social contract' status agreed upon between the government and society".

The Shaping of Family Production of Care

The second important measure which the government took was to shape the production of care by the family, and notably its

female members. This was made effective through various means in Hong Kong. First, the message that the family should shoulder the primary responsibility for caring of its old people and other dependents was repeatedly avowed publicly in official documents of the government. The most notable example could be seen in the annual report of the social welfare office of 1955 :

"[T]he family should shoulder the responsibility of caring for the elderly members. The government would only care and be responsible for those elderly who had no relatives and were destitute" (Home Affairs Department, 1955; quoted by Chow, 1985, p.134)

Although this message was hardly new to the Chinese families of Hong Kong, it was nevertheless repeatedly spelt out in the subsequent social welfare white papers which were published respectively in 1965, 1973 as well as in 1979 (Hong Kong Government, 1965, 1973 & 1979). Even in 1990 this idea of family responsibility was continuously stressed in the draft white paper of social welfare which is supposed to lead the social welfare of Hong Kong into the next decade when Hong Kong would become a Special Administrative Region of the PRC :

"The Family unit is a vital component of society... The family is a source of support and strength in the care of the infirm and the elderly... In Hong Kong, high values continue to be attached to the family unit to an extent which cannot be matched by any other

institution" (Hong Kong Government, 1990, p.15).

On the other hand, this notion of family responsibility had received strong and popular support from the commercial sector which had a predominant influence in the Basic Law Drafting Committee by which the post 1997 social policy was formulated. This was clearly reflected in Article 144 of the Basic Law where it stipulated that "the government of Hong Kong Special Administrative Region shall maintain the previous social welfare system and shall formulate ...policies... in the light of the economic condition" (The Republic of China Basic Law of Hong Kong Special Administrative Region, 1989). However, this is not surprising because on the political and economic front, the notion of family care was taken to be correlated with the operation of the minimal government, while the operation of which would almost mean that the vested interests of the commercial sector were to be protected.

Besides promoting the avowed objective of family responsibility, the shaping of family care was made effective by various sanctioning measures through the operation of different social policies. In order to enforce the Chinese family to remain or become the first line of problem solving, the government attempted to penalise morally those families which, for one reason or the other, relinquish its responsibility in solving the 'personal' problems of its members which were within

its domain. The penalisation, when given, was mainly in a form of moral and social stigma which the family would, by and large, avoid. It is hard to assess objectively how and to what level this moral sanction was effective. Nevertheless, as far as the fact that the Chinese state had all along been moralised and that the state had always been seen as the only legitimate institution which acted to uphold the standard of morality in the society, the authority of the state and the government in moral enforcement and in moral sanctioning could not be underestimated. This argument is well supported by Lau and Kuan (1988) in their recent study on the Chinese ethos of Hong Kong wherein the traditional Chinese state was empowered to guard over the morality of the civil society, and yet this authority of the traditional Empire state has successfully been transplanted into the colonial system. As a result, "it was the prerogative of the state to mould society in such a manner that a favourable social environment could be created" (Lau and Kuan, 1988, p.7). This moulding of the morality of the society, as I have argued above, included the moulding of the duty of the family as a whole as well as the gender distribution of labour within the family. For example, the morality which supported the notion of male as patriarch and female as subordinate was also the result of this process.

Apparently, the morality of family care and the gender division of labour within the family were not purely ideological

constructs. They were nonetheless reflections of the economic relationship between the two genders in the economic market. As a matter of fact, it had long been viewed in Britain and in Hong Kong that work was the proper place for men while home was for women. Reflected in different social policies such as social security, men had been regarded as the breadwinner of the family, and women, though in paid employment, played only supportive and supplementary roles. In labour market women were also viewed as reserved labour force, but the primary responsibility of production rested on the men.

In Hong Kong, the morality of women as carers were also strengthened by social work services. Examples could be seen where early social work pioneers in Hong Kong advocated for women to leave their employment and to return to their family to take care of their dependents, because the mother played an integrative role in the family which could by no means be replaced (Fong, 1966). In response to the rise of female employment in the 1970's, family life education programme, which was a kind of personal social work service, was developed to equip the public, who were in other words women, with "skills and positive attitude in dealing with the challenges", and the aim was to prevent 'family problems' (Social Welfare Department, 1987, p.45).

In Britain, on the other hand, the proper role of women was

also strongly sustained by different social policies. For example, income maintenance for the family had been interpreted to mean maintaining the husband's income and earning capacity, whereby women's income, regardless of amount, was not regarded as a vital part of the family income (Land & Parker, 1978). This mentality was unequivocally reflected in National Insurance where

"Married women living with their husband need not be included since where the unit is the family it is the husband's and not the wife's health which it is important to ensure. As long as the husband is in good health and able to work, adequate provision will be made for the needs of the family, irrespective of the wife's health, whereas when the husband's health fails there is no one to earn wages" (Gilbert, 1966, p.315)

Besides, social policies in regard to the Invalid Care Allowance and Social Security Pensions had important effects in strengthening the caring role of women. Furthermore, the existence of professional social work in Britain, as it was in Hong Kong, had added another dimension to the production of gender roles within the family. As it was argued by Rustin, "social work was explicitly developed in support of a prescriptive model of familial care and control" (Rustin, 1979, p.140).

Corresponding closely with the status of women, the status of men at home was also a clear reflection of their economic

status in the labour market. As evidenced in this study, the role of Chinese sons in terms of care was in nourishing. In other words, men provided the necessary financial support (the productive function), leaving women (daughters and daughter-in-laws) with the tending duties (reproductive function). In other words, men were not expected to be cared for but they could care about if they so wished (Dalley, 1988, p.12). This is found both true among Chinese elderly care in Britain and Hong Kong, where in the case of London Chinese this gender status in care was also salient among grandchildren who took care of the elderly grandparents.

On top of the social policies as well as the socio-economic basis which perpetuated the moral construction and social production of family and female care, it should however be noted that the mass media had played an indispensable role in the process. This is particularly valid in modern city states such as Hong Kong where the construction of ideology had in fact penetrated into the civil society through the effectiveness of the television and the press. Paradoxically though, the effectiveness in the promotion of ideology by the mass media had always rested on the popular belief that it is not ideological. In other words, the belief in the value neutrality and the 'objectivity' of the media had led to a general tendency in the society to take what was portrayed by the media as what it should be in real life situations without much scepticism.

In the case of Hong Kong, the failure of the family, and more precisely of the female family members, to perform the morally prescribed duties in the care of old people and other dependent members would be condemned almost without exception in the reports of the press. The mass media also collaborated with other agents in the society in positively enforcing the production of care by the family. Throughout the years there have been open elections of a model family, model wife, as well as a model mother which were run by the television companies and the press. The shaping of family and female responsibility was made more apparent by the fact that there was virtually no elections of model sons and model husbands. In a capitalist society like Hong Kong which has been marked by male dominance in the economy, press freedom could hardly escape from the penetration of the ruling ideology, which simultaneously intruded into the family and civil society. So the ideological penetration through the mass media had become an effective instrument in shaping and reproducing the production of care by the family and the subsequent gender roles division.

Government measures in shaping the moral practice of the family in general and women in particular did not rely entirely on social welfare policy. They were also forcefully supported by other important social policies such as taxation. It was only from 1990 that married couples could declare their income separately. Before this year, the wife's income had to be

declared as part of the total income of the husband. In addition, tax deductions were also given to families which supported their elderly financially or those which lived with their elderly parents. These policies also implicitly supported the internalisation and the implant of ideology about the responsibility of the family as well as female in particular to care for the old people and the dependents in the family.

Apart from the enforcement of morality, positive measures were also taken place to support and reward the families which complied. As far as the support was concerned, community education was considered as an effective means to restore the traditional functions of the family.

The Shaping of Help Seeking Patterns

The third important measure contributing to the production of the caring function of the Chinese family and the respective division of labour was the formation of the help seeking pattern on the part of the old people. While the first two measures were about the shaping of the the care providers, this measure concerns the social production of help receiving. It is argued that the help seeking pattern of Chinese old people was shaped by a multi-faceted process enforced by the social and economic system. In the context of Hong Kong, it was the laissez-faire capitalist economic system which helped to mould and strengthen

the spirit of 'self reliance'.

For a long time since the 1950's and the 1960's, the rapid economic development in Hong Kong was attributed to the low-paid but hardworking labour force. The ideology underpinning this economic system was that of Social Darwinism which emphasised the survival of the fittest in the market place. Accordingly, public morality had shrunk and had become more privatised and personalised. In other words, altruism, equality and the concept of citizen rights had never been considered as important for the society, for they were described as 'poison' which jeopardised the economy of the society and undermined individual incentive. However, altruism was argued, according to the Parsonian view, to be a necessary function within the family in capitalist society (Rustin, 1979; Middleton, 1974). The privatisation of public morality had created a belief that morality was almost completely equivalent to self reliance. Hence, a successful person was one who had the ability to maximise his own interests to the utmost by whatever means were available. On the other hand, a strong moral stigma adhered to those who failed to have their needs fulfilled by themselves or by their immediate families.

In a study of Chinese families in a new town in Hong Kong, Chiu (1989) had found that people preferred private to public service when both were available. For example, a majority of them consulted private doctors and dentists rather than government

clinics, even though the costs of the former was up to 5 times more expensive. Taking into account that there had always been shortfall in government services which might have deterred users, the deep-rooted belief of self reliance as moral and the stigma of moral failure could not be underestimated. In the same study, Chiu also found that the rate of social service consumption in the new town was unexpectedly low. For example, only about 5% of the old people had used the services provided by the elderly centres, and the use of family service centre was even lower (only about 2% had used this service). Furthermore, the findings of the Hong Kong study also showed that old people would use home help or community nursing service as a final resort, provided that an alternative (mainly family care) was available. This finding was echoed by another study by Ngan (1990) who found that social service consumption by Chinese elderly people was only very low. Similarly, the study of Chinese old people in London also exhibited an extremely low rate (below 5%) of service consumption in home help, meals service and nursing. Apart from language barrier which deterred old people from using social services in this country, a majority of old people had expressed a reluctance to "rely on the government", which was a same kind of feeling of failure and stigma which was felt by the Chinese old people in Hong Kong.

In short, it was the privatisation of public morality underpinning the laissez-faire capitalist economy which shaped

people's help seeking pattern : to solve problems by themselves and their families rather than with recourse to the state.

Furthermore, the residualisation of social welfare and the remedial nature of social work practice in Hong Kong also contributed to enforce the spirit of the market mechanism. As I have highlighted in the preceding analysis, social policy in Hong Kong had never been associated with the concept of citizens rights. But rather, social welfare had been designed and operated in such a way that it resembled the traditional Chinese or religious charity whereby the principle of less eligibility and the identity of the deserving were present. In a social welfare system which suppressed the concept of citizenship, it would not be surprising that self sufficiency was internalised as a guiding pattern in seeking assistance when such needs arose. This further explained why Chinese old people, when faced with needs and problems, tended to seek help from their private source (specifically self help and family care) in the first instance.

In concluding this chapter, it needs to be pointed out that the provision of care by the Chinese family especially its female members and the help seeking pattern of the Chinese old people are two related phenomena which engage in reciprocal interaction. They are, nevertheless, strengthened, reinforced, and reproduced by state intervention into the moral as well as the economic domain of the society. State policies in economy, tax and social

welfare have contributed to regulate the moral practice of care by the family, shape the provision of care of family as well as by its female members in particular, and mold the help seeking pattern of the old people who need assistance. Nonetheless, by analysing and arguing that the state does reproduce family care, this by no means overlooks the preference to family care by old people because of the warmth and genuine affection that the informal caring relationship provides.

CONCLUSION

THE FUTURE OF INFORMAL CARE FOR CHINESE ELDERLY

This study attempted to answer several important questions concerning the caring capacity of the Chinese family as seen in the communities of London and of Hong Kong. These questions, which have been raised in the introductory chapter of this thesis, can be summarised as : first, has the Chinese family lost its traditional caring function for its elderly members in face of the impact of 'westernisation' and 'industrialisation' ? Second, what is the present pattern of care for old people as seen in the Chinese family in the two communities, and has the traditional division of labour in performing caring tasks been changed or has it been preserved ? Third, what are the socio-economic conditions which constitute the present pattern of care for the Chinese old people ?

Concerning the traditional caring function of the Chinese family, I have argued in the first chapter that the prevalence of the traditional extended family in Chinese history has been only a myth. The majority of the Chinese family in the pre-industrial era were, owing mainly to economic reasons, not extended in their structure. Instead, the small family was the most popular family form, and large extended family where several families and generations lived together under the same roof was only the practice of the gentry and the elite class which constituted a

small minority in the society. It is apparently a mistake to relate the care provided by the Chinese family to the existence or the prevalence of the extended family. It is also incorrect to assume that since the size of the Chinese family has become smaller it has necessarily lost its caring function. The findings in London and Hong Kong concluded that this assumption, which was based on the Structural-Functional perspective of sociology that change in family structure would lead to the change in the family function, is not applicable to the topic of family care of Chinese old people. As seen in London and in Hong Kong, Chinese families are still active in providing care for their elderly members, inspite of the fact that the extent of care, its division of labour and its pattern of provision may not be completely the same in the two places. As Laslett (1977) has pointed out for Britain, the nostalgia of the pre-industrial 'golden age' which was believed to have provided more care and veneration for the old people is only an illusion. An equivalence can be seen in the Chinese case. However, despite the fact that the large extended family form has never been a norm in the Chinese communities in London and in Hong Kong, care for old people continued to be provided mainly within the small families.

This point of conclusion can be substantiated by the research findings in both London and Hong Kong. First, Chinese old people in both places had an active financial relationship

with their family members. In London, majority of the Chinese old people had received financial contribution from their sons and daughters, although very few of them actually relied on these contributions to maintain themselves. In Hong Kong, in the absence of a comprehensive financial protection scheme, the majority of the Chinese old people received financial support from their children as a measure to supplement the meagre amount of public assistance and old age allowance which some of them received. Second, the majority of the Chinese old people in the two places still lived with their families. In many of the cases this was not purely due to the absence of alternative but rather reflected a matter of preference of both the old people and their family members. In the cases where Chinese old people lived on their own, face-to-face interaction between family members were still found to be active. Among the London Chinese in particular, grandchildren were often found to be the ambassadors between the old people and their children. Visits were also received by the old people from their children and in-laws. Thirdly, as far as personal care, household maintenance and social survival were concerned, most Chinese old people who needed help received assistance, and help was provided in some tasks where need had not been expressed. Overall, the findings showed that the subjective as well as objective shortfall of assistance was rather small.

There were some Chinese old people in these two places who

needed care but were not helped. In London, they were mainly those who either had no children at all, or those who had children who lived out of Britain. There were a few old people who were not helped by their children who lived in London. Generally speaking, the obvious barrier was a poor relationship, either with the daughter or with the daughter-in-law who was very often the only relative present. In Hong Kong, similarly, most old people who received no assistance were those single or widowed without children. Out of the minority who had children but received no help, poor relationship was also found to be a main cause. Besides, there were a few cases where help was not available because of economic reasons. Nevertheless, despite a relatively small number of Chinese old people who received no assistance from their family, it is reasonably obvious that the major source of assistance for Chinese old people was their family.

However, to conclude that the Chinese family today as seen in London and Hong Kong has not lost its caring function does not imply in any sense that all other aspects of the Chinese traditional family have remained unchanged. Instead, a new pattern of relationships between old people and their children and grandchildren have emerged, and a unique pattern in the division of labour in care within the family has also been developed. Traditional roles and expectations within the family, such as those of the daughters and the daughters-in-law have seen

new changes, and the new caring role of the grandchildren was found to have developed. This study showed that the traditional role of the Chinese daughter-in-law, which was discussed in Chapter 1, has changed. There is a shift of position between the daughters and the daughters-in-law in taking care of the old people in the family. In other words, the traditional role of the daughters-in-law in taking care of the dependents and the elderly people at home has gradually been taken over by the daughters. This happens among Chinese old people in both London and Hong Kong where the caring sphere of the daughters-in-law have been narrowed down from what was traditionally expected to be a comprehensive role to concentrating on household maintenance and management. A major redistribution of caring roles within the Chinese family has emerged and the daughters, regardless of whether they are married, were found to have performed most of the personal care (tending) activities for the old people which was traditionally expected on the daughter-in-laws who now play only a supplementary role.

This redistribution of caring roles within the Chinese family, as I have argued in the earlier chapters, is an outcome of the changing socio-economic status of women which have consequently altered the relationship and the reciprocal positions between the old people and the daughters-in-law. This finding has significant implications on the reconstruction of the basis of informal care by the Chinese family.

Besides the changing role of the daughters and the daughters-in-law, this study found that a new caring role of the grandchildren had emerged to fill some of the care gaps. This was particularly true for the Chinese community in London where a 'relationship gap' existed between the old people and their children's generation due solely to the peculiar socio-economic condition which they faced (this finding has been elaborated in Chapter 7). However, the emergence of the caring role of grandchildren not only witnesses the redistribution of caring roles within the Chinese family as argued above and in the earlier chapters, the fact that it did not emerge as much in Hong Kong as in the Chinese community in London, together with other evidence, supports the argument put forward in Chapter 7 and 8 about the affective and obligatory compatibility and socio-economic basis underpinning care.

Nevertheless, there are certain aspects of Chinese family care which have been preserved. In this respect, the study in London and Hong Kong showed that the primary domain for Chinese sons in caring for their elderly parents has not been changed, despite the fact that it has seemingly been expanded. In other words, they continued to play the traditionally expected nourishing role and be the primary financial supporters of their parents. Their expansion of caring domain, however, is symbolic rather than real. Overall, the study showed that sons' participation in other caring activities was only selective --

activities with relatively lower frequency, lower immediacy, and lower regularity. This study also showed that sons in the Chinese family were the brokers of care who usually received signals of demand from the elderly parents and arranged personnel and/or material resources to meet them. This brokerage role of sons not only reflects the continuation of sons' status and authority in traditional family, but more importantly it is an indication that the productive status of men versus the reproductive status of women and the division of labour it engendered in the traditional Chinese society is being perpetuated and reproduced in the present time. A paradigm of the gender division of care in the Chinese community can be illustrated in the following table.

To sum up this section, it needs to be reiterated that the notion of diminished Chinese family function for its elderly members is not correct. However, it is equally wrong to ignore the preservation and changes which have taken place within the Chinese family in the process of continuing the caring activities. As far as social policy planning is concerned, it is absurd if the family is only viewed as an umbrella institution wherein the individual members' distribution of resources and labour functions are overlooked.

A PARADIGM OF GENDER DIVISION OF CARE
IN THE CHINESE CONTEXT

	MALE (SON)	FEMALE (DAUGHTER)
SPHERE	Public	Private
CENTRAL DUTY	Work	Home
ECONOMIC STATUS	Productive	Reproductive
FAMILY STATUS	Head Breadwinner	Subordinate Integrator
DIVISION OF CARE	Financial support Nourishing Broker - Making arrangements for care Supporting in male's responsibility	Personal care Tending Frontline helper Labour of duty & of love
LIVING PATTERN	Living with elderly parents	Living close to elderly parents

In regard to the basis of informal care by the Chinese family, this study showed clearly that the Chinese old people in both London and Hong Kong did not secure assistance simply by their status and position in the family. Obviously, as pointed out in Chapter 2, the change in the economic mode of production had brought about a fundamental change in the status of old people both within and outside the family. Subsequently, this

change of economic position of elderly people at home and the improvement of socio-economic status of working women in the society have, in effect, altered the relationship as well as the reciprocal contributions between the elderly person and the other family members, particularly the daughter-in-law. This helps to explain the issue of financial contribution and familial tension, and the difficulty of old people in locating their own position in the family.

Social policy planners cannot simply assert the classical thesis again that Chinese old people were being taken care of because they are old so they are respected. It has been argued in the earlier chapters that being old as a Chinese has no longer (or even never) been a basis of care. This study in London and Hong Kong found that a caring relationship emerged and sustained where the following conditions were present and interlinked : reciprocal contributions of the Chinese old people and the family members; affective compatibility between the old people and the helpers; obligatory compatibility between the two parties; and finally the sanction of normative expectations. All these conditions are subject to be affected by the state intervention (this argument was developed in Chapter 8). The more intensive and intimate the nature of the caring tasks, the higher affective and obligatory compatibility it is required, and the more selectivity it is upon the carers. One typical evidence for this is the changing role of the daughter-in-law which I have

argued above.

The important implication for the future of family care in the Chinese context is that the availability of carers in no way determines the availability of care. As I have argued in Chapter 6 and 7, lack of compatibility will inevitably result in escalating familial tension and conflict, and in some unusual cases it will cause a breakdown in relationship and termination of assistance. The present home help as well as community nursing policy which denies the needs of those old people who have a female member present is therefore unrealistic and unjust, because it ignores the relationship tensions which arise out of the incompatibility between the old people and some of the carers in the family, and it penalises those who successfully tolerate this incompatibility.

As I have argued in the earlier chapters, informal care in the Chinese context, as it certainly does in the British context, has never been a 'natural phenomenon' which just emerged spontaneously. Social policy development which aims at promoting better family care for the Chinese old people in the future must take into consideration the changes as well as preservations of the family roles that exist within the Chinese family. The socio-economic conditions of the society which affect the dynamic interplay, in terms of the ability and resources to reciprocate in the family and the affective and obligatory compatibility

between the Chinese old people and their family members, have also to be recognised.

In Hong Kong as well as in Britain, there is an increasing tendency for social policy to emphasize on the caring function of the family. However, on the other hand, affective and obligatory compatibility as a basis of care in the Chinese context implies directly that there will be an increased selectivity for carers in the face of a growing demand for personal care, especially when this generation of elderly people grow even older. Therefore, the cost of care to the Chinese family cannot be ignored by the state in the future. To the British government, the voicelessness of the Chinese people cannot be taken for granted, and the caring function of the Chinese family cannot be taken advantage of without support. To the Hong Kong government, the myth that the family is a private domain has to be corrected. Since the state has constantly penetrated into the family in shaping its morality and the help-seeking behaviour of its members, the argument that the state should not support the family because it is a private domain has lost its foundation. Furthermore, this study has also pointed out that traditional Chinese normative beliefs alone (such as filial piety, the rectification of names) did not help old people adequately to secure their status in the family nor the assistance they required. It is absurd to continue arguing, as the Hong Kong Government does, that Chinese old people are cared

for in the family because they are, in keeping with tradition, being respected. To make the Chinese family continue to care for its elderly members, and to enable its family members, especially female members, to have equal opportunities to those of their male counterparts, the intervention and support of the state is an inevitable solution.

Although as pointed out in the Introduction that this research was one of the first of its types in studying the Chinese old people in Britain and in comparing them with their counterparts in Hong Kong, there were, nevertheless, some limitations and constraints. There was in the first place a lack of basic information about Chinese older people in Britain which made sampling difficult. Furthermore, although in-depth interviews were conducted, this research in London and Hong Kong was based on a relatively small sample size which, in result, may weaken the reliability and representativeness of the findings. It is recommended that more representative research in a larger scale should be carried out, so that more information about this quiet minority group can be known in the future.

APPENDIX A

Population of Hong Kong Chinese in Britain
(Projected from Immigration Statistics)

<u>YEAR</u>	<u>TOTAL NO.</u> <u>PER. YEAR</u>		<u>NO.</u> <u>ADMITTED</u>		<u>INCREASE BY</u> <u>B.R.-D.R.*</u>		<u>TOTAL</u>
1971	43,015**	+	3,025	=	46,040X1.06	=	48,802
1972	48,802	+	2,846	=	51,648X1.06	=	54,746
1973	54,746	+	2,382	=	57,128X1.06	=	60,555
1974	60,555	+	2,292	=	62,847X1.06	=	66,618
1975	66,618	+	3,347	=	69,965X1.06	=	74,163
1976	74,163	+	2,927	=	77,090X1.06	=	81,715
1977	81,715	+	2,023	=	83,738X1.06	=	88,762
1978	88,762	+	1,665	=	90,427X1.06	=	95,853
1979	95,853	+	1,596	=	97,447X1.06	=	103,296
1980	103,296	+	1,346	=	104,642X1.06	=	110,920
1981	110,920	+	1,129	=	112,049X1.06	=	118,772
1982	118,772	+	500***	=	119,272X1.06	=	126,428
1983	126,428	+	500	=	126,928X1.06	=	134,544
1984	134,544	+	500	=	135,044X1.06	=	143,146
1985	143,146	+	500	=	143,646X1.06	=	152,265
1986	152,265	+	500	=	152,765X1.06	=	161,931
1987	161,931	+	500	=	162,431X1.06	=	172,177
1988	172,177	+	500	=	172,677X1.06	=	183,037

N.B.

- (1) * The increase by birth is based on average Hong Kong birth rate of 85/1000 and the decrease on average Hong Kong death rate of 25/1000. Hence, annual increase of 60/1000.
- (2) ** Base figure of 43,015 = total number of Hong Kong born and China born extracted from the result of census, 1971.
- (3) *** Immigration figures of 1982 onwards, due to the contraction of immigration law and the saturation of Chinese food services and industry, was estimated to be reduced at 500 per annum.

Source : Hong Kong Government Office, 1983;
Hong Kong By-census, 1986

APPENDIX B

The Research Instruments

1. The Sampling Method

The first and central problem in designing the study was to determine a method by which the Chinese elderly in London could be identified. The aims of this process was to reach a cross spectrum of Chinese old people and to form a relative valid sampling frame. However, in the process of doing so, there were some in-built constraints :

(a) There was no official and reliable statistical data (number and age distribution) of Chinese elderly people in London. As a result, the size of the sample frame had to be relied on estimation.

(b) The Chinese community in London was not formed as a confined geographical community. Although Soho was named as the 'China Town', it was only a concentration of Chinese restaurants, supermarkets, and other commercial activities. It was, however, not a concentration of Chinese population. Chinese in London, rather lived dispersely in different boroughs, such as the Westminster, Camden, Tower Hamlets, Hackney, Lambeth, and Islington. This situation made the identification of individual elderly people relatively difficult.

(c) The Chinese in Britain had been well known for being unvocal. The fact that they was so was partly due to language barrier which resulted in a tendency to avoid contacts with local authorities even in matters relating to their welfare and civil rights. As a result, few local authority departments were aware of their existence. That means to obtain informations about them through local borough would not be practical.

(d) To obtain a list of Chinese old people through the local GP was possible. But there were also difficulties. For example, owing to the scattered Chinese population it would be necessary to consult a number of GP in different borough and to negotiate access to their list of patients, but under which there might only be a few Chinese elderly people in the register.

(e) The voters' list was also considered. But it was not practical for 2 major reasons. First, many elderly people were believed not to have registered as voters; secondly, it was not effecient because there was no age register in the voters' list, and it would be too time consuming to go through every individual in the voters' list of various borough in London.

(f) There are Chinese Community Centres in London where elderly social groups or luncheon clubs are being organised. Many Chinese old people have contacts with these centres. But a sample relied on those who often actively participated in centre

activities would run the risk of being biased.

Due to the above-mentioned constraints, it is quite obvious that to rely on one single method to identify the Chinese old people in London for research sampling would be quite inadequate. A combination of different approaches has to be adopted in order that a more reliable sample could be formed. As there is not a geographical Chinese community, methods adopted in other research such as door-to-door visits in a target community has to be ruled out. Identification of Chinese old people has still to rely on 'agents' with whom elderly people and their relatives had contacts. These 'agents' are often doctors, churches, and Chinese community centres. It is recognised that identifying sample respondents through these 'agents' would inevitably pose other sorts of handicap to the research design (e.g. the sample would be selective rather than random), however, it has an advantage of having a wider cross section of selected sample. The 'agents' contacted include :

(a) Chinese Medical Practitioners

A list of 6 Chinese doctors at London was supplied by the Hong Kong Government Office. Of the 6 doctors, 2 were NHS doctors, 3 were private doctors, and 1 was an acupuncturist. The reason for approaching Chinese doctors was that many Chinese elderly people preferred to consult doctors who spoke the same

language and who understood them. Some Chinese old people might even consult Chinese private doctors if they had not registered under a Chinese GP.

Negotiation for access to the register of patients was carried out initially by a formal letter which briefly introduced the research, then followed up by telephone contacts. Appointments were then made for a visit paid by the researcher to explain in more details what and how access to patients register was to be carried out. Throughout the process, the value of the research and the principle of confidentiality were repeatedly stressed.

Out of the 6 doctors to whom letters were sent, one private doctor was unfortunately found just passed away. Out of the remaining 5 doctors, response was generally positive and encouraging, although all of them expressed reservation in allowing the researcher to access to their patients register during initial contacts. The only exception was from a private doctor practising at China Town who refused to help 'completely and was reluctant to have follow up contacts.

Of the 4 doctors willing to co-operate, 1 NHS doctor practising at Middlesex had no Chinese patients aged 65 and over, and the acupuncturist had only a few Chinese elderly patients. There were 2 doctors, however, whose assistance was significant. These two doctors practised in Westminster and had a list of

predominantly Chinese patients. The number of elderly patient (aged 65 and over) in their list was estimated to be around 80 - 100.

Both doctors were very sensitive to the issue of confidentiality, and no direct access to the patients' register was allowed. To bypass this difficulty, letters inviting patients to participate in the interview were sent out to the elderly people through the doctors.

(b) Chinese Community Centres

A list of Chinese organisations and Chinese community centres was provided by the Hong Kong government Office. Appeal letters introducing the research and the researcher were sent to 5 Chinese community centres which provided services for Chinese people in different borough. These 5 organisations were :

1) Camden Chinese Community Centre :

There was an elderly group as well as a luncheon club regularly attended by some 30 Chinese elderly people at the time of this contact. Apart from the group, the centre organised social and educational activities for the elderly people which were usually attended by about 100 old people. There were some Chinese old people whose names and addresses were still kept in

the correspondence list but did not participate in the centre activities regularly. ^{This} These group of old people were mainly those who had sought information and advice from the centre in the past. On top of this, there were a number of elderly people who were known to the centre but due to health reason had withdrawn their particiaption. At the end, those inactive members who were known to the centre ^{were} was selected to form the sampling frame.

2) China Town Chinese Community Centre

This centre was one of the first Chinese community centre in London which mainly provided charitable welfare services as well as information and advice to Chinese people. In 1985 the centre started an elderly group which eventually built up its regular membership to around 40. Like in the Camden Chinese Community Centre, there were also a number of old people who were inactive but were still known to the centre.

Other Chinese centres such as the Chinese Association of Tower Hamlets and the Hackney Chinese Project were also consulted. It was found that the elderly activities organised by these centres were similar to the above two, but their group of old people was smaller in size. It was therefore decided that the sampling frame of the Chinese community centres should be concentrated in Camden and China Town, and their inactive members

were the primary target for the sampling. There are certain advantages of doing so. First, these two centres had a larger register of old people aged over 70. Second, the Chinese old people to be sampled from the doctors' list, Chinese community centres and Chinese church would be all located in the same districts, namely Westminster and Camden.

3) Chinese Church

The St. Martin-in-the-Fields Church had a regular Chinese congregation consisted of about 150 Chinese people at the time when initial contacts were made. The church, at the time of the research, was also starting an elderly centre for the elderly church members.

The overall sampling situation was listed in the following table :

Agent/ Sampling Frame	Sample Size	%
1. Doctor 80 - 100	30	1/3
2. Chinese Centres 60	20	1/3
3. Church 30	10	1/3
Total 190	60	1/3

Out of the above sampling frame, 60 Chinese elderly people were sampled by quota sampling method.

On the other hand, sampling in Hong Kong was relatively straight-forward, because the Chinese population was much more concentrated. It was acknowledged that new towns in the New Territories were relatively newly developed where there was a smaller size of elderly population. As a result, an 'old' community, namely Shaukiwan which is situated in the East of Hong Kong, was selected to be the community in which elderly people were to be sampled for interview. There are certain advantages for selecting this district for the purpose of the study. First, this district is one of the 'older' districts in Hong Kong where the population is relatively more settled. Second, it is a combination of residential and commercial area which is typical in Hong Kong. Thirdly, there is a mixture of public and private housing in this district which is different from the new towns where there are predominantly public housing residents. A sample of old people from this community would give a more balanced background of old people. A list of inactive members was obtained through the Shaukiwan elderly centre in which 40 of those who aged over 65 were randomly sampled.

2. Data Collection

A semi-structured questionnaire was designed and data

collection was conducted mainly in the form of home visits. In some circumstances where the respondents preferred to have the interviews conducted outside their own homes, appointments were made for the respondents to come to the elderly centre or Chinese community centres for the interviews. The interviews in London were conducted by the researcher himself, whereas in Hong Kong interviews were conducted by two interviewers who were Sociology graduates experienced in survey interviewing. Orientation and preparation were given to the two interviewers beforehand, and the researcher himself had monitored the progress of the interviews. Interviews in London were firstly taped and later transcribed, while those in Hong Kong were recorded on paper. Due to the pace of the old people in responding to questions, particularly in London where the dialect of Hakkua was difficult to comprehend, each interview took about 2 to 2½ hours. Quantitative data was processed in the computer by SPSS PC+ software.

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