

# High Expectations and a Low Level of Commitment: A Class Perspective of Welfare Attitudes in Hong Kong\*

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*Based on the data from a territory-wide survey of Hong Kong residents conducted in 2006, this article explores the current attitudes of Hong Kong people toward social welfare, the differences between the social classes, and whether or not there are significant differences between different social classes with regard to welfarism. It finds that Hong Kong people*

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apparently tend to have high expectations but a low level of commitment in their welfare attitudes, lacking the kind of unity on the issue of welfarism seen in Sweden, the model welfare state in the West. In addition, there are no significant differences among the classes in Hong Kong with regard to attitudes toward welfare. This is certainly not congruent with the situation in many Western welfare states, where the underprivileged classes are significantly more supportive of the welfare state than the privileged classes both in terms of expectation and commitment.

**KEYWORDS:** welfare attitudes; welfare state; social class; class conflict; Hong Kong.

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In the past few years, Hong Kong's economy has been recovering rapidly and this in turn has led to a dramatic increase in the government's accumulated surplus. Yet, affected by economic regionalization and globalization, people from the lower social classes have not benefited much from the economic recovery. The polarization between rich and poor is actually intensifying. According to government statistics, the Gini coefficient rose from 0.525 in 2001 to 0.533 in 2006.<sup>1</sup> Against this background, more and more civil organizations have been petitioning the government to increase public expenditure to relieve the pressure on the lower classes.<sup>2</sup> At the same time, however, many liberal economists and business leaders oppose such moves, arguing that any increase in public expenditure would lead to tax increases, thereby pushing Hong Kong toward becoming a welfare state and damaging the local economy.<sup>3</sup> How do Hong Kong people see this debate? More specifically, what

<sup>1</sup>Census and Statistics Department, *2006 Population By-census: Thematic Report — Household Income Distribution in Hong Kong* (Hong Kong: Government Logistics Department, 2007), 77.

<sup>2</sup>Hung Wong, "Xianggang de fupin zhengce" (Hong Kong's anti-poverty policy), in *Liang'an sandi shehui zhengce: lilun yu shiwu* (The social policies of Hong Kong, Taiwan, and mainland China: theory and practice), ed. Chack-kie Wong, Kwong-leung Tang, and Ngan-pun Ngai (Hong Kong: Chinese University Press, 2007), 157-73.

<sup>3</sup>Francis T. Lui, "Xianggang de jingji zhuanxing" (The economic transformation of Hong Kong), in *Xianggang ershiyi shiji lantu* (The blueprint for the twenty-first-century Hong Kong), ed. Siu-kai Lau (Hong Kong: Chinese University Press, 2000), 74-75.

kinds of attitudes do Hong Kong people hold toward the provision of social welfare? Are there any differences among the social classes regarding such attitudes? Based on the data from a territory-wide survey of Hong Kong residents conducted in 2006,<sup>4</sup> this article examines the attitudes that Hong Kong residents currently hold toward social welfare and analyzes whether different social classes hold significantly different attitudes.

### **Welfare Attitudes and Social Class**

Welfare attitudes here refer to how people view their government's policies on the provision of social services and social security. As we all know, divisions between social classes have always been an important source of social conflict. For this reason, governments everywhere often find themselves compelled to address problems of social class. In the process of formulating macro policies, they attempt to seek some kind of equitable distribution and effective balance in order to promote social harmony and stable governance. Different kinds of welfare state have thus emerged.<sup>5</sup> Stated succinctly, the function of a welfare state is to reapportion social resources and opportunities in order to minimize social conflicts or risks that arise from an over-reliance on the market. The tool that is employed is social policy.<sup>6</sup> Through social security and the provision of public services, social welfare policies are used to adjust the relationship among the issues of class, the distribution of resources, and market risks. Because social policy is an important method by which the welfare state adjusts class relations and relieves class conflicts, the relationship between

<sup>4</sup>The target population of the survey was Hong Kong residents who were not hospitalized, were at least 18 years of age, were speakers of Chinese, and who were residing on land. The sample was drawn by means of a multistage stratified systematic sampling scheme. Face-to-face interviews were conducted in the summer of 2006. Out of a random sample of 1,746 addresses, 830 interviews were successfully completed, yielding a response rate of 47.5 percent.

<sup>5</sup>James O'Connor, *The Fiscal Crisis of the State* (New York: St. Martin's, 1973).

<sup>6</sup>Stefan Svallfors, "Class, Attitudes and the Welfare State: Sweden in Comparative Perspective," *Social Policy & Administration* 38, no. 2 (April 2004): 119-38.

class and the welfare state continues to be an important topic that social scientists and politicians in Europe and the United States spare no effort to pursue. The related studies have been enduring and the achievements great.<sup>7</sup>

Theoretically speaking, because the lower classes, in particular the working class, possess fewer resources, have relatively weak competitive power in the labor market, and are subject to higher market risks compared to those classes that are better positioned in the market (i.e., the middle and upper classes), they tend to support a more comprehensive welfare system. However, since every society differs in class composition, in the financial and organizational arrangements of its welfare polities, and in how much is undertaken in its welfare policies, the abovementioned general rule does not necessarily apply everywhere, but must be supplemented or revised according to actual conditions.<sup>8</sup> For example, a fair number of empirical studies have demonstrated that the welfare state, having its roots in the needs of a large and powerful working class, is a simplification of the reality. Francis G. Castles found that the social and political strategies of the working class in their pursuit of social welfare are not necessarily predicated on unrestrained universalism, but are often selective in nature, with means testing not necessarily ruled out.<sup>9</sup> On the other hand, Peter Baldwin discovered that the middle class in many European countries also emphasizes universalism with regard to certain social policies in order

<sup>7</sup>Ibid.; Heikki Ervasti, "Class, Individualism, and the Finnish Welfare State," *Journal of European Social Policy* 11, no. 1 (February 2001): 9-23; Walter Korpi and Joakim Palme, "New Politics and Class Politics in the Context of Austerity and Globalization: Welfare State Regress in 18 Countries, 1975-95," *American Political Science Review* 97, no. 3 (August 2003): 425-46; Richard D. Shingles, "Class, Status, and Support for Government Aid to Disadvantaged Groups," *Journal of Politics* 51, no. 4 (November 1989): 933-62; Stefan Svallfors, "The End of Class Politics? Structural Cleavages and Attitudes to Swedish Welfare Policies," *Acta Sociologica* 38, no. 1 (1995): 53-74; and Stefan Svallfors, "Welfare Regimes and Welfare Opinions: A Comparison of Eight Western Countries," *Social Indicators Research* 64, no. 3 (2003): 495-520.

<sup>8</sup>John Myles and Jill Quadagno, "Political Theories of the Welfare State," *Social Service Review* 76, no. 1 (2002): 34-57.

<sup>9</sup>Francis G. Castles, *The Working Class and Welfare: Reflections on the Political Development of the Welfare State in Australia and New Zealand, 1890-1980* (London: Allen & Unwin, 1985).

to guarantee that they will receive the same benefits as others.<sup>10</sup> Apart from this, in recent years barriers to social mobility have increased in many developed countries because of economic slowdowns or even recessions due to globalization or for other reasons, causing the middle class to increase their reliance on the welfare state. When the overall economic environment worsens, the unemployment rate surges, and it is not only the average blue-collar worker who is affected but people from every class of society, including the middle class.<sup>11</sup> When diligence and hard work cannot stave off downward social mobility, the middle and lower-middle classes will naturally tend to seek greater protection from the system.<sup>12</sup>

The above literature review demonstrates that the attitudes of different social classes toward social welfare are neither entirely clear nor rigidly structured, but subject to change in relation to every society's internal class composition, production structure, and opportunities for social mobility. From this angle, by exploring Hong Kong people's attitudes toward social welfare and the possible class differences involved, we will not only be able to obtain a truer picture of these attitudes, but also provide an important empirical basis upon which to conduct a future study comparing Hong Kong's experiences with those of other societies.

### **The Attitudes of Hong Kong People toward Social Welfare**

In order to be able to make possible direct comparisons with the situation in other countries in future studies, we have directly borrowed a series of indicators established by the International Social Survey Program

<sup>10</sup>Peter Baldwin, *The Politics of Social Solidarity: Class Bases of the European Welfare State, 1875-1975* (Cambridge: Cambridge University Press, 1990).

<sup>11</sup>Korpi and Palme, "New Politics and Class Politics," 425-46; and Svallfors, "The End of Class Politics?" 53-74.

<sup>12</sup>Tai-lok Lui, "The Psychology of the Middle Class," in *Indicators of Social Development: Hong Kong 2004*, ed. Siu-kai Lau, Ming-kwan Lee, Po-san Wan, and Siu-lun Wong (Hong Kong: Hong Kong Institute of Asia-Pacific Studies; Chinese University of Hong Kong, 2005), 179-99.

(ISSP) and Stefan Svallfors to measure the attitudes of Hong Kong people toward social welfare.<sup>13</sup> The ISSP indicators number eight in total, and they mainly measure people's expectations of their government with regard to the provision of social services. These eight indicators are: providing a job for everyone who wants one; keeping prices under control; providing health care for the sick; providing a decent standard of living for the old; providing a decent standard of living for the unemployed; reducing income differences between rich and poor; giving financial help to university students from low-income families; and providing decent housing for those who cannot afford it. The respondents were asked, on a 4-point scale (with 0 = definitely not; 1 = probably not; 2 = probably; and 3 = definitely should be), whether or not the government should take responsibility in each of these eight indicators. The higher the figure, the stronger the respondent's feeling that the government should provide this item of welfare.

The indicators borrowed from Stefan Svallfors fall in two areas,<sup>14</sup> one being whether the government should increase the amount of tax revenue used to pay for social services and the other being how the provision of social services and security should be financed. Each area consists of six indicators. The indicators constructed by Svallfors are different from the eight ISSP indicators in that instead of measuring people's welfare expectations, they reflect people's attitudes toward how much public money should be committed to the provision of social services and security and how such provision should be financed.

Table I lists the results of the respondents' assessments and the mean value of the eight ISSP indicators. First, in terms of percentage, the great majority of the respondents held a positive view of the eight indicators, with over 70 percent feeling that the government definitely or probably should assume responsibility in all eight areas. In particular, over 90 percent felt this way regarding five of the areas: providing a decent standard of living for the old (96.4 percent), providing health care for the sick

<sup>13</sup>See note 6 above.

<sup>14</sup>*Ibid.*

(95.5 percent), providing decent housing for those who cannot afford it (92.4 percent), giving financial help to university students from low-income families (92.2 percent), and keeping prices under control (91.5 percent). The percentage of those who felt that way was also very high for the remaining three areas, namely: providing a decent standard of living for the unemployed (81.7 percent), reducing income differences between rich and poor (72.2 percent), and providing a job for everyone who wants one (71.8 percent). These results indicate that, overall, Hong Kong people have a strong inclination toward state intervention in providing social welfare,<sup>15</sup> with the percentage of those who felt that the government should take on the responsibility in various domains of social welfare far exceeding those who held the opposite view. Indeed, the scale mean of each indicator greatly exceeds the mid-point of 1.5 (see table 1). The highest is 2.53 (for providing a decent standard of living for the old) while the lowest is still 1.90 (for providing a job for everyone who wants one). This further reflects that there is a broad feeling among Hong Kong people for the government to intervene and provide social welfare.

However, it should be emphasized that the fact that people have high expectations of the government with regard to the provision of social welfare does not necessarily mean that people have a personal commitment to social welfare. The reality is that when the government intervenes to provide social welfare, this inevitably pushes up public expenditure, and any increase in public expenditure increases the chances that taxes will be raised. With regard to social welfare, no society can have a free lunch. However, Svallfors' study shows that people across countries are often not fully aware of the tax implications of government intervention in providing social welfare; that is, they tend to be more willing to endorse government provision of welfare but less willing to pay more tax for such

<sup>15</sup>State intervention in providing social services is used here to distinguish from the concept of welfarism in the sense that the former does not necessarily mean the provision of direct welfare whereas the latter does. The use of an active labor market policy to encourage employable welfare recipients to work is an example of state intervention and such a policy can hardly be called welfarist.

**Table 1**  
**Attitudes toward State Intervention (%)**

Should it be the government's responsibility to ...	Definitely not	Probably not	Probably	Definitely should be	Scale mean
Provide a job for everyone who wants one	9.1	19.1	45.1	26.7	1.90
Keep prices under control	2.4	6.1	45.6	45.9	2.35
Provide health care for the sick	1.3	3.3	38.9	56.6	2.51
Provide a decent standard of living for the old	1.6	2.0	38.2	58.2	2.53
Provide a decent standard of living for the unemployed	4.5	13.8	54.2	27.5	2.05
Reduce income differences between rich and poor	9.0	18.9	39.8	32.4	1.96
Give financial help to university students from low-income families	2.2	5.6	49.1	43.1	2.33
Provide decent housing for those who cannot afford it	2.3	5.3	51.8	40.6	2.31

**Note:** Scale: 0 = definitely not, 1 = probably not, 2 = probably, 3 = definitely should be.

intervention.<sup>16</sup> Now the question is: How do Hong Kong people view the issue of paying for different kinds of social welfare services using tax money? The six indicators in table 2 are borrowed from Svallfors. These data indicate that the respondents varied sharply in their willingness to see tax money used to pay for different kinds of social welfare services, and this was quite different from their strong consensus on the need for government intervention to provide social welfare. Among the six listed areas of social welfare services, care for the elderly (75.1 percent) was the area in which most respondents thought the government should increase expenditure from taxes, followed by medical care (73.5 percent) and employment policies (59.8 percent). Family services and housing services

<sup>16</sup>See note 6 above.



**Table 2**  
**Attitudes toward Welfare Expenditure (%)**

	Greatly increased	Increased	Unchanged	Decreased	Greatly decreased	Scale mean
Medical care	5.3	68.2	23.5	2.8	0.3	2.75
Care for the elderly	4.6	70.5	23.7	1.2	0.0	2.79
Family services	2.0	42.7	51.7	3.6	0.0	2.43
Housing services	2.3	36.9	50.7	9.8	0.4	2.31
Social assistance	2.4	21.2	48.0	24.4	4.0	1.94
Employment policies	6.2	53.6	35.5	4.5	0.3	2.61

**Note:** Scale: 0 = greatly decreased, 1 = decreased, 2 = unchanged, 3 = increased, 4 = greatly increased.

received 44.7 percent and 39.2 percent, respectively. Only 23.6 percent of the respondents supported the view that the government should increase the amount of tax money used for social assistance (Comprehensive Social Security Assistance), whereas 28.4 percent thought that the amount of tax revenue used to support expenditure on social assistance should be cut. Of the scale means of the six indicators listed in table 2, the mean values of five exceed the mid-point of 2 and only three of these—medical care, care for the elderly, and employment policies—differ more than 0.5 from the mid-point. The other two (family services and housing services) exceed the mid-point by very little. This shows that people's attitudes toward increasing public expenditure on social welfare services using tax money are not as positive as their attitudes toward government intervention to provide social welfare. At present, they tend to put more emphasis on care for the elderly, medical care, and employment policies than on other areas, hoping that the government will increase expenditure in these areas. Since the welfare system of Hong Kong is basically a residual welfare regime,<sup>17</sup> the government's welfare expenditure is much lower than the

<sup>17</sup>Eugene McLaughlin, "Hong Kong: A Residual Welfare Regime," in *Comparing Welfare States: Britain in International Context*, ed. Alan Cochrane and John Clarke (London: Sage, 1993), 105-40.

levels seen in Western welfare states.<sup>18</sup> Hence, Hong Kong people's reservations about using tax revenue to increase public expenditure on social welfare services show that their welfare expectations are inconsistent with their commitment to the provision of welfare.

What is more, Hong Kong people not only differ in their attitudes toward increasing the amount of tax revenue devoted to social welfare services, they are also divided over the methods of financing the provision of social welfare and security.<sup>19</sup> They are very much against using taxes to cover welfare expenditure. Among the six areas of health services, childcare, care for the elderly, sickness insurance, unemployment insurance, and pensions, only care for the elderly received the support of more than half (66.7 percent) of the respondents with regard to covering expenditure through taxes. For the other five areas, the majority of respondents tended to choose other financing methods, such as employee contributions and a combination of levying special fees from those who use the service and individual insurance contributions (see table 3). In addition, the only mean value that exceeds the mid-point of 0.5 is care for the elderly, whereas the mean values of the other five areas are as low as 0.14 or 0.23, further indicating that people are quite hesitant about meeting welfare expenditure through taxes (see table 3). Thus, it is obvious that people are cautious about the methods used to finance social welfare and security. They do not want to over-commit themselves to an unnecessary tax burden and tend to look for other methods of financing this type of expenditure.

<sup>18</sup>Chack-kie Wong and Ka-ying Wong, "Expectations and Practice in Social Citizenship: Some Insights from an Attitude Survey in a Chinese Society," *Social Policy & Administration* 39, no. 1 (February 2005): 19-34.

<sup>19</sup>In Svallfors' measurement, employers were supposed to contribute to the financing of social welfare and social security. In our study, we used employees' contribution instead because we thought that this change would better reflect individuals' level of commitment to the provision of social welfare and social security. Such a change of course makes our study less comparable to Svallfors' work, and we will bear this in mind carefully when comparing the two studies. Anyway, since our focus is similar to Svallfors' which attempts to find out whether the individual is willing to finance social welfare and social security through tax, the change should not make a big difference in terms of policy implications.

**Table 3**  
**Attitudes toward Methods of Financing Social Welfare and Security (%)**

	Taxes	Employee contributions	Special fees from those who use the service/individual insurance contributions	Scale mean
Health services	41.6	27.4	31.0	0.42
Childcare	16.8	10.4	72.8	0.17
Care for the elderly	66.7	20.1	13.2	0.67
Sickness insurance	17.3	27.9	54.9	0.17
Unemployment insurance	23.2	34.4	42.4	0.23
Pensions	14.5	63.9	21.7	0.14

**Note:** Scale: 0 = employee contributions/special fees from those who use the service/individual insurance contributions, 1 = taxes.

### **The Class Structure of Hong Kong Society**

What is the class structure of Hong Kong society? Again, in order to make direct comparisons with Western studies, we first follow Svallfors' classification of the respondents into six classes according to their occupational and employment status (employee, self-employed, or employer): service class I (high-level professionals and government officials, managers of large enterprises, and owners of large enterprises); service class II (somewhat lower-level professionals and government officials, highly skilled personnel, managers of small enterprises, and assistant supervisors of white-collar workers); routine non-manuals (white-collar workers and grass-roots level service personnel who do not have to do physical work); skilled workers; unskilled workers; and the self-employed (owners of small shops, farmers who farm their own land, and owners of self-operated businesses).<sup>20</sup> In Hong Kong 21.4 percent of the economically active people belong to the service classes (I and II), 34.3 percent to the class of routine non-manuals, 33.2 percent to the working class (skilled workers

<sup>20</sup>See note 6 above.

**Table 4**  
**Class Structure (%)**

Service class I	8.5
Service class II	12.9
Routine non-manuals	34.3
Skilled workers	20.5
Unskilled workers	12.7
Self-employed	11.1
Total	100.0
(n)	(449)

and unskilled workers), and 11.1 percent are self-employed (see table 4). According to this classification, routine non-manuals and the working class together make up two-thirds of the economically active population.

However, because not all of the respondents were economically active,<sup>21</sup> to supplement our findings we also surveyed the respondents for their subjective view of which class they belonged to. From the data in table 5, we can see that there are distinct differences between the subjective class identification of the respondents and the above classification of class structure according to occupational and employment status. Only 3.2 percent of the respondents saw themselves as belonging to the upper and upper-middle classes, 34.7 percent felt that they belonged to the middle class, and 33.5 percent and 28.7 percent considered themselves as belonging to the lower-middle and lower classes, respectively. In other words, from the viewpoint of subjective class identification, Hong Kong society is largely made up of the middle, lower-middle, and lower classes; only a tiny minority consider themselves part of the upper-middle or upper classes. These results are very much in line with previous local findings.<sup>22</sup>

<sup>21</sup>Our survey revealed that, from a total of 830 people who were interviewed, only 447 could clearly state their occupational and employment status. Of the remainder, the great majority were students, homemakers, retirees, or unemployed people.

<sup>22</sup>Timothy Ka-ying Wong and Chack-kie Wong, "The Public Perception of Social Welfare in Hong Kong: Implications for Social Development," *Social Development Issues* 21, no. 1 (1999): 1-11.

**Table 5**  
**Subjective Class Identification (%)**

Upper class	0.4
Upper-middle class	2.8
Middle class	34.7
Lower-middle class	33.5
Lower class	28.7
Total	100.0
(n)	(753)

### **Welfare Attitudes and Social Class in Hong Kong**

Now the question that requires further investigation is: Do the different classes in Hong Kong display similar welfare attitudes? In order to answer this question, we first take as the basis the above two frameworks for classifying class, and compare the scale-mean differences between the highest (most privileged) and lowest (most underprivileged) classes with regard to their welfare expectations and commitment. We hope that through the comparison of the two polar classes, we can determine whether the most underprivileged class has, as traditional class theory argues, a more welfarist orientation than the most privileged class.<sup>23</sup>

It is noteworthy that whether class differentiation is based on occupational and employment status or on subjective class identification, class has a negligible influence on the scale mean of the eight welfare indicators (see table 6). The difference in scale mean between the two poles of class (service class I versus unskilled workers, and the upper/upper-middle class versus the lower class) was very small. Indeed, our statistical test (ANOVA) also showed that no difference was of statistical significance. Among the eight indicators of government intervention in providing social

<sup>23</sup>We use the term "privileged class" to denote service classes I and II in the occupational and employment classification and the upper class, upper-middle class, and middle class in the subjective class identification. We assume these categories of people are more "privileged" (better positioned) in the labor market compared to other social classes (i.e., underprivileged classes).

**Table 6**  
**Class Difference in Attitudes toward State Intervention**

Should it be the government's responsibility to ...	Scale mean (occupational and employment status)	Class difference (occupational and employment status)	Class difference (subjective identification)
Provide a job for everyone who wants one	1.76	-0.01	0.24
Keep prices under control	2.31	-0.10	0.03
Provide health care for the sick	2.50	-0.30	-0.04
Provide a decent standard of living for the old	2.54	-0.20	-0.23
Provide a decent standard of living for the unemployed	1.99	-0.09	0.07
Reduce income differences between rich and poor	1.91	-0.25	0.10
Give financial help to university students from low-income families	2.31	-0.11	-0.22
Provide decent housing for those who cannot afford it	2.28	-0.11	0.18

**Note:** The class difference (occupational and employment status) is calculated by subtracting the value for service class I from the value for unskilled workers; and the class difference (subjective identification) is calculated by subtracting the value for the upper/upper-middle class from the value for the lower class.

welfare, the scale mean of service class I was higher than that of the unskilled working class. In addition, in three indicators, the scale mean of the upper/upper-middle class was higher than that of the lower class. It seems that in Hong Kong the privileged classes are more inclined toward state intervention in providing social welfare than the underprivileged classes—a sharp difference from the experience in the West,<sup>24</sup> at least in terms of welfare expectations.

<sup>24</sup>See note 6 above; and Korpi and Palme, "New Politics and Class Politics," 425-46.

**Table 7**  
**Class Difference in Attitudes toward Welfare Expenditure**

	Scale mean (occupational and employment status)	Class difference (occupational and employment status)	Class difference (subjective identification)
Medical care	2.76	0.18	0.13**
Care for the elderly	2.79	0.03	-0.03
Family services	2.38	0.06	0.18
Housing services	2.22	0.34**	0.53***
Social assistance	1.78	0.50***	0.50***
Employment policies	2.53	0.78***	0.62***

\*\*  $p < 0.01$ ; \*\*\*  $p < 0.001$ .

**Note:** See table 6.

However, when we turn from welfare expectations to welfare commitment, we can see that class differences are more prominent. If class differentiation is based on occupational and employment status, in all six indicators unskilled workers are more inclined than people in service class I to support a decision by the government to increase the amount of tax money used for such services (see table 7). The statistical test also told us that three of the six indicators were of statistical significance: housing services, social assistance, and employment policies.<sup>25</sup> If the classification is based on subjective class identification, the results are quite similar. With the exception of care for the elderly, for which the lower class is less inclined than the upper/upper-middle class to support the government increasing the amount of tax money used to fund the service, the indicators all yield similar results to those from the classification by occupational and employment status in that the lower class is more inclined than the upper/upper-middle class to support a move by the government to increase the amount of tax money used to pay for such services. In addition, the statistical test shows that four of these five indicators are of statistical signifi-

<sup>25</sup>Their F-ratios were 3.422, 4.544, and 8.682, respectively.

**Table 8**  
**Class Difference in Attitudes toward Methods of Financing Social Welfare and Security**

Indicator	Scale mean (occupational and employment status)	Class difference (occupational and employment status)	Class difference (subjective identification)
Health services	0.39	0.16	-0.03
Childcare	0.14	-0.02	0.01
Care for the elderly	0.67	-0.01	-0.11
Sickness insurance	0.14	0.16**	0.10**
Unemployment insurance	0.22	0.24*	-0.02
Pensions	0.11	0.10	0.03

\*  $p < 0.05$ ; \*\*  $p < 0.01$ .

Note: See table 6.

cance. These four are medical care, housing services, social assistance, and employment policies.<sup>26</sup> In brief, even though people of different classes have high expectations of the government intervening to provide social welfare, they become hesitant when they realize that they may have to pay higher taxes to support the provision of such social welfare services. In general, the hesitation is greater among the privileged classes than among the underprivileged classes.

Nevertheless, the difference between the attitudes of the two poles of class toward the methods of financing the provision of social welfare and security is not as clear as that between their attitudes toward increasing welfare expenditure (see table 8). For occupational and employment classifications, statistically significant results were obtained only in the areas of sickness insurance and unemployment insurance;<sup>27</sup> i.e., unskilled workers are more inclined than people in service class I to support a government move to finance the relevant expenditure through taxes. For subjective class identification, only one indicator (sickness insurance)

<sup>26</sup>Their F-ratios were 5.328, 14.097, 7.046, and 19.399, respectively.

<sup>27</sup>Their F-ratios were 3.527 and 2.783, respectively.



**Table 9**

**Government Intervention Index, Expenditure Index, and Financing Index: Values by Class based upon Occupational and Employment Status (mean)**

	Government intervention index	Expenditure index	Financing index
Service class I	75	56	22
Service class II	72	55	20
Routine non-manuals	71	58	27
Skilled workers	74	60	29
Unskilled workers	67	62	28
Self-employed	72	59	21

showed statistical significance;<sup>28</sup> i.e., the lower class is more inclined than the upper/upper-middle class to support a decision by the government to finance such expenditure through taxes. As pointed out earlier, the majority of Hong Kong people are more inclined to think that the provision of social welfare and security should be financed by non-tax methods, such as through individual contributions and employee contributions. Given that our class analysis shows that the class differences on the issue of social welfare financing are weak and fragmented, it is not difficult to say that, in general, the above majority transcends class.

In order to more succinctly grasp the relationship between class and welfare attitudes, we consolidated the values of the indicators in tables 1, 2, and 3 to form three composite indices, namely government intervention index, expenditure index, and financing index, each with scores ranging from 0 to 100.<sup>29</sup> The higher the index, the greater the approval for state intervention in providing social welfare. Then, we calculated the mean score of each class on the three indices according to our two class classifications (see tables 9 and 10).

<sup>28</sup>Its F-ratio was 5.422.

<sup>29</sup>The composite index was calculated by adding together the values of the related welfare indicators, then dividing this figure by the largest value, and finally multiplying the result by 100. A composite index from 0 to 100 was then obtained. The values of  $\alpha$  in the reliability test of the three composite indices were 0.8147, 0.6817, and 0.6784, indicating that the reliability of the three indices was high.

**Table 10**  
**Government Intervention Index, Expenditure Index, and Financing Index:**  
**Values by Class based upon Subjective Identification (mean)**

	Government intervention index	Expenditure index	Financing index
Upper/upper-middle class	74	56	28
Middle class	72	57	27
Lower-middle class	73	58	23
Lower class	71	61	28

If classification is based on occupational and employment status, the first thing worth noting is that the differences in attitudes toward government intervention in providing social welfare among the six classes are not great. The mean score of the composite index was about 67 to 75, with a difference of 8. However, whether 67 or 75, the scores are on the high side and the approval level is close to that of the Western model welfare state of Sweden.<sup>30</sup> This further reflects the strong expectation in Hong Kong that the government should intervene to provide social welfare.<sup>31</sup> Apart from this, it was service class I and skilled workers who expressed the greatest approval for government intervention in providing social welfare, with a mean score in the composite index of 75 and 74, respectively. They were followed by service class II (72), the self-employed (72), routine non-manuals (71), and unskilled workers (67). Such a result allows us to further understand the distinctive quality of and the complex

<sup>30</sup>In 1996, Sweden's approval index for the various classes ranged from 61 to 82. See Svallfors, "Class, Attitudes and the Welfare State," 125. Sweden is used for a rough comparison with Hong Kong in this study because it is regarded as a model Western welfare state. Our rationale is that if the welfare attitudes of the residual-oriented welfare state of Hong Kong are similar to those of Sweden, this would imply that welfare attitudes more or less transcend welfare systems.

<sup>31</sup>The United States, whose welfare system is more market-oriented, has a relatively low expectation of government intervention in providing social welfare. Therefore, its approval index for the various classes ranged from 51 to 67 (see Svallfors, "Class, Attitudes and the Welfare State," 125). This finding more or less demonstrates that high expectations for more welfare do not necessarily transcend countries and peoples.

differences among different social classes in Hong Kong regarding the issue of welfare expectations. For example, the conflicts within the service classes (between I and II) are very close to the conflicts between the service classes and skilled workers; and the conflicts within the working classes (between skilled and unskilled workers) are very close to the conflicts between service class I and unskilled workers. Equally surprising is the finding that the levels of approval for government intervention in providing social welfare expressed by service class I and skilled workers are in fact equally high, while service class II, routine non-manuals, and the self-employed also expressed very similar levels of approval for government intervention. This experience has rarely been found or mentioned in studies carried out in the West.

We also discover that people with different subjective class identifications all gave rather high approval ratings for government intervention in providing social welfare (see table 10). The mean score of the composite index ranges from 71 to 74, a difference of only 3. This shows that the orientation toward government intervention in providing social welfare of those of different subjective class identifications is almost the same.

As for the expenditure index, the data in tables 9 and 10 indicate that the mean scores of the two different class classifications are much lower than their scores on the government intervention index. Specifically, if classification is made according to occupational and employment status, the mean score of the expenditure index is about 55 to 62, much lower than the mean score of the government intervention index mentioned above. If the classification is based on subjective class identification, the mean score ranges from 56 to 61, which is only slightly lower than the range of the occupational and employment classification. The ranges of the mean scores of the two classifications are also lower than Sweden's level of 55 to 71 in 2002,<sup>32</sup> showing that the different social classes in Hong Kong are less willing than those in Sweden to see an increase in the amount of tax money used for social welfare. In addition, while Hong Kong people

<sup>32</sup>Svallfors, "Class, Attitudes and the Welfare State," 128.

are less likely to approve of the idea of increasing welfare expenditure using tax money than they are to approve of government intervention to provide social welfare, the class differences are more clear-cut on attitudes toward welfare expenditure. The mean scores of the underprivileged classes are higher than those of the privileged classes. These results are in fact consistent with traditional class theory that argues that the underprivileged classes are more likely than the privileged classes to feel that the government should increase welfare expenditure using tax money.

With regard to the financing index, we can see in tables 9 and 10 that, as discussed earlier, the mean scores of both class classifications are extremely low. For the occupational and employment classification, the mean score ranges from 20 to 29, whereas for the classification based on subjective class identification, it ranges from 23 to 28. Such scores are not only far below the levels in Sweden,<sup>33</sup> but again also reflect a high degree of skepticism among Hong Kong people of different classes about the idea of financing welfare expenditure through taxes. Nonetheless, the fluctuations in the mean scores between different classes in the two class classifications show that class differences do exist in their attitudes toward the methods of financing social welfare and security. It is worth noting that such class differences are not totally consistent in the two class classifications. In the occupational and employment classification, the underprivileged classes (routine non-manuals, skilled workers, and non-skilled workers) are apparently more inclined than the privileged classes (service classes I and II) to support financing social welfare and security through taxes. The mean scores of the former are 27 to 29, while those of the latter are only 20 to 22. These differences are blurred in the classification based on subjective class identification. In the subjective classification, the mean scores of the lower, middle, and upper/upper middle classes are almost identical (27 to 28), while the mean score of the lower-middle class is as

<sup>33</sup>In 2002, Sweden's scores for the various classes ranged from 66 to 87. See Svallfors, "Class, Attitudes and the Welfare State," 129. It should be borne in mind that the scores in Sweden being much lower may partly be a result of our modification of Svallfors' measurement pointed out earlier.

**Table 11**  
**Regression Analysis of Government Intervention Index, Expenditure Index,**  
**and Financing Index: Occupational and Employment Status**

	Government intervention index	Expenditure index	Financing index
Service class I	7.253*	-6.141**	-5.854
Service class II	4.243	-6.668***	-7.361
Routine non-manuals	4.268	-3.284*	-1.008
Skilled workers	5.937*	-2.702	0.731
Self-employed (unskilled workers for reference)	4.293	-2.865	-6.371
Females (males for reference)	-0.935	-2.986**	-0.130
R <sup>2</sup>	0.014	0.058***	0.018

\*  $p < 0.05$ ; \*\*  $p < 0.01$ ; \*\*\*  $p < 0.001$ .

**Note:** The respective reference groups of independent variables are in parentheses.

low as 23. The reason for this phenomenon is unknown and further research is needed for clarification.

Finally, we placed the two different class classifications in two independent OLS regression models in order to ascertain the relationship between social class and the three different welfare indices.<sup>34</sup> The results are summarized in tables 11 and 12. Several observations can be made. First, on the government intervention index, service class I and skilled workers are significantly more inclined than unskilled workers to support government intervention in the provision of social welfare. This is in

<sup>34</sup>In our regression model, we also added the variable of gender, because Western studies show that females are more welfarist in orientation than males. See Marit Hoel and Oddbjørn Knutsen, "Social Class, Gender, and Sector Employment as Political Cleavages in Scandinavia," *Acta Sociologica* 32, no. 2 (1989): 181-201; Shingles, "Class, Status, and Support for Government Aid to Disadvantaged Groups," 933-62; Barbara Hobson, "No Exit, No Voice: Women's Economic Dependency and the Welfare State," *Acta Sociologica* 33, no. 3 (1990): 235-50; and Ervasti, "Class, Individualism, and the Finnish Welfare State," 9-23. We wanted to see whether this finding applies to Hong Kong.

Table 12

**Regression Analysis of Government Intervention Index, Expenditure Index, and Financing Index: Subjective Class Identification**

	Government intervention index	Expenditure index	Financing index
Upper/upper-middle class	2.750	-4.412	0.970
Middle class	1.023	-2.999**	-0.473
Lower-middle class (lower class for reference)	2.022	-2.111	-4.110
Females (males for reference)	-1.597	-2.948**	-1.002
R <sup>2</sup>	0.004	0.029***	0.007

\*\* p < 0.01; \*\*\* p < 0.001.

Note: The respective reference groups of independent variables are in parentheses.

sharp contrast to the experience in the West. However, there is no indication that subjective class identification has an impact on the government intervention index. Gender similarly has little influence, unlike the findings in some Western studies that women are more welfarist in orientation than men.

On the expenditure index, those in service classes I and II and routine non-manuals are all less willing than unskilled workers to see public expenditure on social welfare services increased (see table 11). This is in line with the predictions of traditional class theory. Yet, surprisingly, in contrast with the experience in the West, females are less inclined than males to support increases in public expenditure for social welfare services. The reason for this is unknown. As for subjective class identification, only the middle class is less willing than the lower class to increase the amount of tax money used for social welfare, with females again displaying an oppositional tendency.

On the financing index, the data in tables 11 and 12 reveal that whether class differentiation is based on occupational and employment status, on subjective class identification, or on gender, no significant relationship is found.

Moreover, according to our regression analysis, although class and gender have some individual effects on the government intervention index and expenditure index, such effects are quite small as the largest  $R^2$  in all of the regression models is only 0.058, meaning that the model can only explain 5.8 percent of the variation of the dependent variable.

### **Conclusion and Discussion**

This study has used data from a territory-wide survey of Hong Kong residents conducted in 2006 to explore the current attitudes of Hong Kong people toward social welfare and whether or not there are significant differences between different social classes with regard to welfarism. In summary, our findings can be boiled down to the following observations. First, in terms of welfare expectations, Hong Kong residents strongly support government intervention in providing social welfare. The strength of their support is similar to that in Sweden, the model of a welfare state in the West. Second, in terms of welfare commitment, Hong Kong people are relatively cautious. They not only have reservations about the idea of increasing public expenditure on social welfare services, but also largely do not want to finance social welfare and security through taxes. This phenomenon is very different from the experience in Sweden. In other words, Hong Kong people apparently tend to have high expectations coupled with a low level of commitment in their welfare attitudes, lacking the kind of unity on the issue of welfarism seen in Sweden. Third, Hong Kong people's high expectations regarding government provision of welfare services basically transcend class; i.e., there is no significant difference between different social classes in their welfare expectations. In contrast, with regard to welfare commitment, especially in attitudes toward increasing public expenditure on social welfare, the underprivileged classes generally take a more positive view of the matter than the privileged classes. Yet there are no such class differences in people's attitudes toward the methods of financing social welfare and security. Our regression analysis also shows that although class has some effect on individual

welfare attitudes, such effects are negligible as all of the  $R^2$  statistics are very small. Hence, it is reasonable to say that at present there are no significant differences among the classes in Hong Kong with regard to attitudes toward welfare. This is certainly not congruent with the situation in many Western welfare states, where the underprivileged classes are significantly more supportive of the welfare state than the privileged classes both in terms of expectation and commitment.

Svallfors argues that the importance placed by political parties and activist organizations (such as labor unions) on class-related subjects relating to social welfare is key in determining which class conflicts in a society are strong and which are weak. In particular, he explains that because, historically, political parties and interest groups in Sweden have had a clear and strong class orientation, discussions about social class and class conflicts continue unabated. By contrast, politics in the United States lacks a clear class basis. Not only are unions exceptionally weak, but political parties also do not emphasize their class foundations. This makes it difficult for class relations to be fully transformed into politics and the decision-making process.<sup>35</sup>

Svallfors' explanation seems to suit Hong Kong as well: political conditions in Hong Kong are worse than in the United States. Hong Kong does not even have mature political parties or mature politics in the Western sense, to say nothing of class-led political parties. Government decision-making is largely controlled by a conservative elite from the commercial and professional world. Also, the cleavages between political parties are largely defined by their attitudes toward democracy and not by issues relating to social welfare.<sup>36</sup> This has made it harder in Hong Kong than in the United States to transform class relations into politics and the decision-

<sup>35</sup>Svallfors, "Class, Attitudes and the Welfare State," 130-31.

<sup>36</sup>Wong and Wong, "The Public Perception of Social Welfare in Hong Kong," 10; and Timothy Ka-ying Wong, "Issue Voting Revisited: A Comparison of the 1998 and 2004 Legislative Council Elections," in *The 2004 Legislative Council Elections in Hong Kong*, ed. Hsin-chi Kuan and Timothy Ka-ying Wong (Hong Kong: Hong Kong Institute of Asia-Pacific Studies, Chinese University of Hong Kong, 2006), 171-208.



making process and easier for class relations in Hong Kong to become more reliant on the power of the market.

However, what Svallfors' argument cannot explain is the following: in Hong Kong, where no significant conflicts exist in the attitudes of the various classes toward the welfare state because of the lack of class politics, why does the society exhibit high expectations but a low level of commitment toward the welfare state, an inconsistent attitude not observed in Western welfare states such as Sweden? We, too, have no firm answer to this question, but we believe that a clue can very probably be found in the following series of factors unique to Hong Kong. First, in international terms, Hong Kong's tax rate has always been relatively low. The tax burden of the privileged classes is not particularly heavy. For this reason, they have not put up much resistance to moderate increases in the welfare burden assumed by the government in order to reduce conflicts in society. Second, faced with growing challenges from economic regionalization and globalization in recent years, Hong Kong's middle class, which is composed largely of those in the service industry, has come under assault. Quite a few of them are facing the pressure of downward mobility, and some have even fallen into negative equity. This has led them to increasingly abandon a hitherto consistently held attitude of "self-reliance,"<sup>37</sup> and to seek greater protection from the system.<sup>38</sup> Third, facing a growing gap between rich and poor, and the ever-growing problem of poverty, in recent years the Hong Kong government has yielded to pressure and actively intervened to provide various forms of social welfare, with the goal of establishing a harmonious society.<sup>39</sup> This kind of top-down change in system and ideology cannot but influence the mentality of the masses in society, the result being a social notion that cuts across classes. Fourth,

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<sup>37</sup>Chack-kie Wong and Timothy Ka-ying Wong, *Assessment of Social Welfare Conditions in Hong Kong: Challenges Facing the "Self-Reliance for Welfare" Mentality* (Hong Kong: Hong Kong Institute of Asia-Pacific Studies, Chinese University of Hong Kong, 1998).

<sup>38</sup>Lui, "The Psychology of the Middle Class," 198-99.

<sup>39</sup>Chack-kie Wong and Timothy Ka-ying Wong, *How to Promote Social Harmony in Hong Kong* (Hong Kong: Hong Kong Institute of Asia-Pacific Studies, Chinese University of Hong Kong, 2006).

Hong Kong is a Chinese society. The great majority of residents have always had the cultural tradition of "When successful, one tries to let everyone benefit" (達則兼善天下), and the value of "Fear inequality, not poverty" (不患寡而患不均). For this reason, when the government took the lead in publicizing the idea of a harmonious society, which carries implications of a welfare state, it was quickly taken up by the whole population, at least in terms of expectations. This phenomenon is to some extent similar to the experience of Israel where strong support for the welfare state with small and sometimes inverted class differences in attitude is also observed due to the country's distinctive national context mandating economic collectivism and state interventionism.<sup>40</sup> Fifth, as pointed out earlier, the fundamental conflicts between Hong Kong's political parties lie not in their class line but in their insistence on democracy and on their attitude toward the Chinese government.<sup>41</sup> This unique condition may weaken the role of political articulation and mobilization in the formation of class differences in attitude toward the welfare state.<sup>42</sup> Sixth, in Western societies such as Sweden and the United States, because people from different classes of society have already experienced heavy taxation, it is inevitable that very stable class views on the benefits and drawbacks of the welfare state have formed. However, in Hong Kong the welfare state is, after all, something that has emerged only in recent years.<sup>43</sup> Hence, the tendency of the majority of Hong Kong people to have high expectations but a low level of commitment in their welfare attitudes may be a result of their pragmatism: they want only the benefits of welfarism, not its draw-

<sup>40</sup>Michael Shalev, "The Welfare State Consensus in Israel: Placing Class Politics in Context," in *Social Justice, Legitimacy and the Welfare State*, ed. Steffen Mau and Benjamin Veghte (Hampshire: Ashgate, 2007), 193-213.

<sup>41</sup>Wong, "Issue Voting Revisited," 171-208.

<sup>42</sup>Staffan Kumlin and Stefan Svallfors, "Social Stratification and Political Articulation: Why Attitudinal Class Differences Vary Across Countries," in Mau and Veghte, *Social Justice, Legitimacy and the Welfare State*, 19-46.

<sup>43</sup>Although Hong Kong has never claimed to be a welfare state in the Western sense, it has become increasingly welfarist, at least in expenditure terms, as observed by a local social welfare expert. See Chack-kie Wong, "Squaring the Welfare Circle in Hong Kong: Lessons for Governance in Social Policy," *Asian Survey* 48, no. 2 (March/April 2008): 323-42.

backs; i.e., high taxes. Anyway, these "factors" are only theoretical extrapolations or hypotheses. Further empirical studies are needed to clarify and confirm them. Whatever the case, the results of this study should provide an important starting point for future investigations.

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