

# 新興經濟體與成熟經濟體的社會 人口老化問題

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## 中文摘要

就如同其他工業化國家一樣，加拿大與台灣都面臨經濟成長的挑戰及其對人口老化所導致的社會福利制度的威脅。由於人類壽命延長，且家庭成員越來越少，世代傳承對較年輕的勞動力而言負擔日益沈重，社會保險制度也越來越難維持。慢性疾病的治療與長期照顧的成本增加使得健保制度壓力有增無減。為解決這些問題，多項政策選擇常在各國政府政策辯論中出現，如延後退休的年齡、減少權利 (entitlements)、健保改革與控制成本、開放勞工市場讓有限的外來移民來彌補社會勞力的不足。

本文主旨比較加拿大與台海兩岸都面臨的社會人口老化問題。但是由於文化不同與各國經濟發展的階段不同以及社會制度不同，三國所處的困境迥異。首先，第一個主要差異是西方國家常依靠外來移民來防止人口老化問題，但是東亞國家卻很少有此作法。其二，由於加拿大已有相當完善的醫

療健保制度，且採用引進外來移民，所以人口老化的負面衝擊比較和緩。台灣已有全民健保，雖可紓解一些人口老化的壓力，但是社會的變遷導致越來越多的老人得不到家庭的照顧，需倚賴社會服務，是社會的潛在危機。勞力不足與年輕人負擔加重則是另一項危機。而中國大陸的人口老化所導致的社會問題最嚴重，因為目前醫療健保體系與制度迄未能因應此一問題，未來將可能會有嚴重危機。

# Aging<sup>1</sup> Societies in Emerging and Mature Economies: Towards Uncharted Territory

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## Introduction

Like all other societies in the industrialized world, both Canada and Taiwan are facing challenges to economic growth which threatens the resilience of their social welfare systems because of their aging populations. As people live longer and as they have smaller families, intergenerational transfers are becoming more onerous for the younger members of the workforce. Social insurance programs are becoming more difficult to sustain, and the rising costs of chronic disease treatment and long term care are putting strains on health care programs. Many policies are debated in the public sphere to address these problems: increasing the age of retirement, reducing entitlements, reforming and controlling costs of health care, and opening the labor market to a controlled immigration to offset the effects of society's aging. In Western societies, all these policies are generating fierce resistances and

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<sup>1</sup> Google enters three times more entries with “aging” than with “ageing”: with apologies for the authors who wrote differently!

their implementation is marred by disagreements over the role of the state and issues of national identities, although more liberal immigration policies represent less of an issue in a country like Canada, the United States, or Australia than in East Asia and Western Europe. In East Asia, these policies were never considered part of the policy mix because welfare regimes have been developed more recently. In Taiwan, the uncertainty about its future in relation to China and the exceptional nature of the latter's welfare regime are presenting especially complex challenges. This article will focus on the specific challenges faced by the Republic of China (ROC, hereafter Taiwan), in relation to the unique situation of its giant neighbor, the People's Republic of China (PRC, or in shorthand, China).

### **The challenges of aging societies**

All Western societies and East Asian societies are facing the same reality of aging, although at slightly different rates. While the most urgent and pressing problem in global demography is the sustainability of population growth in developing countries in a context of acute competition for limited resources, the diminishing of population growth in developed countries may be seen as a success and a positive omen for world population if developing societies adopt the same behavior. Reduced population growth however presents policy-makers with problems that were unforeseen three decades ago: in a nutshell, how to ensure continued prosperity and economic growth in societies where an increasing proportion of the population is dependent for its well-being on a shrinking

workforce? (Ko et al 2007: 43)

In most Western countries, more than a century of economic growth, relatively modest population growth, combined with pressures from civil societies and public intervention, have allowed the establishment by governments, corporations, and labor, of welfare regimes that can provide long term care for the elderly and that are flexible enough to soften the transition to different regimes (OECD 1998). This ability of Western states to adapt to changed circumstances has allowed demographers to argue that alarmist predictions about the dire consequences of rapid population growth have been exaggerated: incomes per average have grown faster than the population, and

“(…) behavioral and policy responses such as saving for retirement and redesigning pension funds, along with the potential for increased migration from labor-surplus to labor-deficit countries and a more educated and hence more productive population, suggest that population aging need not significantly impede economic growth.” (Bloom 2010: 31)

However, what is true for Western industrialized countries does not apply to East Asia. In that part of the world, economic growth, albeit impressive, is more recent, especially for the PRC and the Democratic People’s Republic of Korea (DPRK, or North Korea). With the exception of Japan, modest population growth and pressures from civil societies for the design of social

policies are recent trends, about thirty years for the Republic of Korea (ROK, hereafter South Korea) and Taiwan, even less so in the PRC. Finally, all states in the region have shown less interest in public intervention for the provision of long term care because of a traditional belief in the role of families as natural provider (Goodman et al 1998). Japan, South Korea, and Taiwan have started to adapt to the new demographic realities and can hope to manage necessary changes because of the wealth they accumulated before and the high levels of their countries' economic development. However, much remains to be done in China, where the spectacular economic growth has yet to lift the majority of the population to levels observed in Japan and its ex-former colonies. As a result, China faces an exceptional context where the population of a still developing country is already facing the kind of demographic transition faced by Western and East Asian industrialized societies (Nakashima et al 2009).

The problem of aging is less acute in Western societies like Canada, where the welfare state has been established for a long period of time, and where social programs like universal access to health care is almost considered a matter of national identity. Welfare regimes, that is, the combination of policies and social programs in health care, education, employment, housing, and long term care, rely on a combination of state intervention and individual contributions that have benefited from long periods of development, often punctuated by intense struggles. Even the United States, which is often seen as a laggard in that respect, has established for a long time programs like Medicare and Medicaid that are seen as

pillars of American social policies that cannot be tampered with easily. All societies of East Asia, with the exception of Japan, were until the 1980s lacking the political conditions that could have facilitated the establishment of more generous welfare regimes. East Asian welfare regimes, qualified in the literature as productivist, were put up primarily by developmental states and have focused on education (Gough 2004).

Taiwan faces many of the same challenges as other East Asian societies like Japan and South Korea, albeit at a less alarming rate. The Council for Economic Planning and Development noted that in 1951, only 2.45 per cent of the population was over 65 years-old, while this number has quadrupled in 2001. This may be affordable now because the diminishing number of people aged younger than 14 years has diminished dramatically from 42 per cent to 17 of the total population, ensuring that the population aged 15 to 64 is more important in number and that the workforce has not seen a dramatic increase in the number of dependents. Projections for the next decades, on the basis of current fertility rates and life expectancy, however, suggest that the dependency rate is going to increase dramatically in the near future, and that the demographic dividend that Taiwan is now enjoying will come to pass (Ko et al 2007: 53).

The challenges raised by these dramatic changes, however, are not only about numbers. The increase in the proportion of elderly in the population means important changes in the qualitative nature of the diseases and illness that health care institutions will have to address. In

particular, a greater proportion of elderly in the population leads to a greater incidence of cases of dementia, a most disabling chronic disease (Gallagher-Thompson et al. 2010: 173). The family has long been the primary source of care for people suffering from this condition all over East Asia, but dramatic change in social values and changes in family structures have affected this traditional way to address the issue (Gallagher-Thompson et al. 2010: 161), and as a consequence, there is a need for greater intervention from the public, either through state programs or through the community. There are, however, important disparities between East Asian societies' ability to cope with these challenges.

On the one hand, societies like Taiwan have established social programs, like the National Health Insurance, that help people cope with this issue and cover virtually all the population. This program was established in 1995, at a later stage than in Western societies at a comparable rate of development, and with a more limited fiscal basis from which to finance the whole system. Moreover, more comprehensive pension reforms remain to be implemented. The ability of Taiwanese society to deal with ageing rests on the capacity of that country to accumulate over time the resources necessary to finance social policies, and the favorable effect of political competition, wherein voters force rival political parties to come up with better proposals for social welfare systems in order to win elections (Ko et al 2007: 53). However, the validity of the view stated above about the positive effects of immigration in Taiwan has yet to be tested, as will be discussed below. Discussion about migration in Taiwan



inevitably raises the prospect – if not the specter - of immigration from China, where pressures for emigration remain important because of the unique demographic predicament in that country.

On the other hand, China, after experimenting with a unique form of social policy system with the People's Commune, has completely transformed its approach and is now experimenting with a welfare regime that is close to a regime of welfare insecurity after decades of economic reform. Chinese decision-makers claim they are considering welfare expansion, but from a very narrow fiscal base, it is difficult to see how they will succeed. China's face four particular challenges related to the aging of its population, all related to its specific political and social conditions: a disproportionate ratio of males to females because of its one-child policy – which will be discussed below, loneliness for rural elderly because of worker migrations to cities, disparities between rural and urban areas in access to social insurance and medical care, and in general absence of infrastructure for elderly care (Gallagher-Thompson et al. 2010: 157-158). These challenges are aggravated by the increase of new challenges to health care, for which Chinese authorities are not necessarily prepared.

If dementia is a condition that affects societies regardless of their level of economic development, this is not the case for many diseases. Infectious and communicable diseases are more prevalent in developing countries, while chronic diseases such as cancer and diabetes are more frequent in developed societies. China

faces a particularly daunting challenge because of a rise in the prevalence of diabetes, which affected 9.7 per cent of the population in 2010 (Eggleston et al. 2010: 140), because its health financing and delivery systems were initially designed to prevent communicable diseases and treat acute conditions and were not prepared to treat long-term care. (Eggleston et al. 2010: 153) This is an important problem in any society with an aging population, but this is acute in a society like China, where infrastructure is limited and the needs are great.

Among the policies debated to reduce the adverse effect of aging, as mentioned earlier, policy-makers in many developed countries are considering a variety of policies that are generating fierce resistance: raising the age of retirement, reducing entitlements, controlling costs, and opening the labor market to a controlled immigration, in the hope of changing the dependency rate for the population of working age. There is no room here to discuss these policies and the strong responses they have elicited. Moreover, as suggested earlier, the historical trajectories of the Western Europe and East Asia are so different that any comparison would be misleading. Although pension regimes in the West have a long institutional history, in East Asia, they are recent gains, if not projects in the making, as in China. Moreover, the policy that has generated the greatest amount of opposition in Western Europe and to a certain extent in the United States, that is, the opening of labor markets to immigration, is still barely explored in East Asia. In particular, in the case of Taiwan, the opening of the country to immigration is made all the more complicated because

of its precarious geopolitical situation. In short, there is a disparity of situations in the West, but this is also true for East Asia.

### **The challenges of immigration**

Immigration policies have been received differently in societies of the so-called New World, on the one hand, and those of Europe and the Former Soviet Union, on the other. Immigration in the Americas and in Australia-New Zealand has received substantial support from the population because it speaks to the core of national identities, defined by escape from persecution and the idea of boundless opportunities. This is a situation that sums well Canada's generally positive view on immigration (Adams 2006; Weeks 2005, Keung 2005, Beauchesne 1995, ECC 1991, Hogben 1991), barring some nativist responses (Hunter 1988). It is interesting to note, in passing, that colonization of the New World by Europeans is contemporary to the increase in migration of Chinese to Taiwan. But Taiwan is located in a region of the world where national identities, or to be more specific, the official claims that nations have a long lineage in the past, is the norm, like Europe, and migration is seen as a disruption of established identities rather than constitutive of new ones.

Although nation-states in Western Europe and East Asia share an official reference to ancient histories, their recent attitudes toward immigration have been dissimilar in the second half of the Twentieth Century's first three decades. In Western Europe, immigration was accepted as a temporary fix for labor shortages during 'les trois

glorieuses,' those decades of rapid growth following World War Two, when economies were booming. In contrast, during those three decades East Asia was sending abroad emigrants, and was not at the receiving end of immigration. Two remarkable exceptions, of course, being the influx of people from China in Taiwan in 1949, and the arrival in Hong Kong of refugees during the turmoil experienced in China under Mao.

Western Europe and East Asia seemed to be on a path of convergence after the 'oil shock' of the 1970s, when European public opinion, responding to economic insecurities and geopolitical upheavals in the Middle East, changed its views on immigration and increasingly came to see it as a threat to national identity and social cohesion (Betz 2007). Ideas over homogeneous nation-states became more popular in Europe, and this idea took a murderous turn in the Balkans after the break-up of the Soviet Union. In East Asia, there was no comparable shifts because the idea of mono-ethnic nation-states, or so the public opinions of these countries were told by their governments, was already deemed natural. While the feelings of insecurity over national identities can be acute in Europe (Lucassen 2005), in East Asian societies national identities are seldom questioned. This is even the case for Taiwan, despite the fact that its status as the Republic of China or a putative Republic of Taiwan remains debated.

East Asian societies do not see immigration as a tool of social policy to offset the negative effects of an aging population. During the Twentieth Century, East Asia was,

in contrast to Canada and the New World, but also France, the UK and Germany, considered a source of out-migration rather than the receiving end of migratory flows. Of course, Taiwan was flooded with refugees from China in 1949, but this was not an economic immigration. Even today, there are more Taiwanese leaving abroad than there are foreigners moving to Taiwan. As Kevin O'Neil noted:

'Taiwan once faced a classic case of "brain drain." Despite government restrictions, a total of over 100,000 Taiwanese left to study abroad in the latter half of the 20th century. During the 1970s and 1980s, an estimated 20 percent of Taiwanese college graduates went abroad for advanced study, and few of them returned. At the peak of the brain drain in 1979, only eight percent of students who studied abroad returned to Taiwan upon completing their studies.' (O'Neil 2003)

Even in countries like Canada where immigration is seen as a complementary way to address some of the imbalances of their demography, in conjunction with other policies, this is not without problems, in the context of a world situation in flux, in which the composition of migrant populations is changing. New immigrants to Canada are coming from world regions where the culture differs considerably from that of the majority of Canadians. The sense of alienation felt by many new immigrants is acute, and the fears of the host societies are often magnified by lack of understanding and also by the legacies left by some unresolved issues within the host society. This has emerged more acutely in recent years in the realm of religion, with majorities expressing unease with the

religious practices of ethnic and religious minorities, in so doing revealing lack of agreement about how much the secularization of society is accepted.

Taiwan has yet to experience this kind of divisive issues. As mentioned before, Taiwan is not considered an immigrant society, and its expatriate population is rather small. According to the National Immigration Agency or (NIA) (內政部入出國及移民署), as of February 2011, there were 430,000 migrants, of which a third were from Indonesia, and more than half from three other Southeast Asian countries. This immigrant population is culturally different, but it is not clear to what extent unless one can know how many of the Indonesians, Filipinos, Thais, and Vietnamese immigrants in Taiwan are overseas Chinese in their countries of origins and speak a language intelligible to the majority. A closer look at the statistics from the Bureau for religious affairs in the Ministry of Interior (MOI)'s department for Civil Affairs suggests this may be the case.<sup>2</sup> In addition to this, Taiwan registers 370,000 residents from China.

The reliance on immigration as a tool to prevent the aging of the population, furthermore, should not be overstated (Guillemette and Robson 2006). McDonald and Kippen have argued that studies have shown that the belief in the positive effects of immigration rests on two

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<sup>2</sup> The Bureau counts only 58,000 Muslims but the NIA counts three times that number of Indonesians in the statistics about foreign residents. Are Indonesian residents sino-Indonesians, who arguably do not profess Islam, or is the bureau for religious affairs only counting Muslims who came from China ?

premisses that are debatable: immigrants are on average younger than the host population, and they have a higher birth rate. McDonald and Kippen also argued that the median age of immigrant populations is not much younger than that of the host society, and the fertility rate of the immigrant communities tends to align with that of the host society as well (1999). In both Taiwan and Canada, immigration appears designed more to address some labor shortages. However, in Taiwan, another phenomenon is exercising an influence on immigration: there is a demand for brides that has increased immigration from Vietnam and Mainland China. MOI statistics for 2003 showed that the number of Vietnamese women married to Taiwanese men had reached more than 60,000 individuals. The demands for foreign or Chinese wives can be seen as a response to skewed sex ratio, wherein there is a greater number of marriageable men than marriageable women, that is, 109 men to 100 women in Taiwan. But this may be debatable because the attitudes of many men may play a part. Yet the problem of skewed sex ratio is too big an issue to ignore in China.

### **Skewed sex ratio and bare sticks**

The extreme imbalance in sex-ratio represents one of the most worrisome concerns of social policies in China, and by extension to the whole region. A phenomenon prevalent in South Korea and Taiwan as well, it is most dramatic in China, because of its population's huge size. The normal range of sex ratio at birth is between 103 to 107 men per 100 women, which mean that there are usually more boys born than girls on any given year.

However, because men die at a younger age than women, there are more women than men in the older age cohorts and overall sex ratio for the whole population tends to favor women. Since the 1980s, however, the sex ratio in China has changed dramatically and the proportion of boys being born versus girls is considerably higher. Li Jianxin, professor of sociology at Peking University, quoted government census showing that since 1982, when the ratio was 108.5, it has widened to 120 in 2009 (China Times 2011).

The greater sex ratio for women at an old age means more widows and single women. That, in itself, represents a particular issue for the design of long term care. However, the sex ratio matters most particularly at the age when people get married and make plans to have children. The current sex ratio imbalance affects people born in the 1980s and thereafter, who are or are about to enter that stages in their lives. In other words, the excess of males in China's population generates a 'marriage squeeze', with men born in the 1980s and after outnumbering marriageable women, and because this sex ratio has increased, the forecast for this imbalance in ten years for now is a 'surplus' of over 25 million men, or the entire population of Taiwan. In a society, like China, where so much importance has been put on raising families for individual's sense of worth, the most devastating perspective for many men is becoming a 'bare stick,' i.e. a man without descendents who cannot continue the family line (Crow 2010). The consequences of this imbalance are poorly known because this is, arguably, an unprecedented phenomenon in its scope, even if it is not new *per se*



(Billingsley 1981). Speculations about a generation of frustrated angry young men becoming aggressive and pushing the government to more bellicose policies can be dismissed as exaggerating, although the Chinese authorities do believe it, if their public education campaign is any education.<sup>3</sup>

Countering the preference for boys responsible for this skewed sex ratio, however, requires from the authorities more than publicity. It demands a rethinking of recent policies that, on the surface, have little to do with family planning, but exert an important influence on the national psyche. Since the communist party has embraced a neo-liberal approach to economic development and dismantled the People's commune regime of social welfare, it is at pains to find an ideological cover for its legitimacy. The embrace of nationalism, in its various guises, and the promotion of traditional Chinese culture are becoming important missions the CCP claims to uphold, and among them, the promotion of Confucianism has been prominent. Confucianism is a canonical tradition but nevertheless an ill-defined and all-inclusive system of thought that can be interpreted in many ways, but there is one aspect of this tradition that has never been in doubt: it is primarily a patriarchal world-view, hardly helpful in the campaign to promote the equality of the sexes. Not much solace can be found in the other aspect of traditional culture that the

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<sup>3</sup> This was suggested by the presence of billboards seen in Beijing in the summer of 2006 put up by the municipal government, which was then making a public campaign of education, saying a girl is as good as a boy. The exhortation of the panel was that preference for boys was bad for society because it prepared a future of angry and frustrated men.

Chinese regime sees as traditional folklore, a dignified way to define folk religions. These beliefs and religious practices are often centered around the idea of ancestors' worship, a male-centered view of the world that denies women any spiritual value. It is not so surprising, then, that the promotion of Confucius, exemplified by the promotion of languages institutes bearing his name, remains highly contested within the party's higher echelons. The most recent demonstration of these debates occurred when a vast statue of the Master from Qufu, ostensibly displayed in Tian'anmen Square for weeks, was abruptly removed on April 22, 2011.<sup>4</sup>

Skewed sex ratio are not a fatality of Confucian societies: South Korea, which had once one of the world's worst sex ratio, had reversed course following a number of state interventions that have modified the structure of incentives for Korean parents. The Chinese authorities are apparently aware of this issue and are anxious about it. However, there is still an issue of several million men without any prospect of raising families. The aggregate effect of this trend is impossible to predict, but it would be irresponsible to ignore its potential in generating more social tensions.

## **Conclusion**

The demographic changes of East Asian societies are unprecedented in their scope. These societies are

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<sup>4</sup> The reasons behind that removal remain disputed, but the contested status of Confucianism is not in doubt.

ageing at a pace that is commensurate to Western societies but they are unequally prepared to meet the challenges this new situation presents. While Japan, South Korea and Taiwan can benefit from the resources accumulated in previous decades, China lacks a large enough fiscal basis to finance more comprehensive long term care. This is an opportunity for policy innovations but the options remain limited by national preferences. Although the developed societies of the regions could theoretically absorb immigration to temporarily offset the effects of ageing, most public are resistant to it. This is understandable considering the size of populations relative to the availability of space and resources. Other policies such as the postponement of pensions, already contested in the West, are likely to be seen in China as a breach of a social contract that is seen as already severely damaged.

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