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Care, Migration, and State in East Asia: Introduction

Yen-Fen Tseng

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In this issue, five articles written by East Asian scholars on care and state are presented together in a special issue format. These five articles focus on how care regimes in East Asian countries have evolved and the roles migrants, the state, and the family play in the provision of care. In the three countries of interest, Taiwan, Japan, and South Korea, care work—especially elder-care work—has been undergoing a transformation of *socialization* (i.e., a shift of care labor that has traditionally been the task of women in the care recipient's family into the public domain). This shift has involved social policies that aim partly to provide more resources for eldercare and partly to facilitate compatibility between working life and home life. These policy measures include financial or personnel support for childcare and nursery care, the introduction of a child-care-leave system, and free day-care for children and older adults.

Regardless of the policy variations adopted by different care regime, there is a sudden increase in need for care workers, with care moved from private households to public or market domains. The sudden increase in demand for care workers has put pressure on individual households, who in turn impress their needs upon the state. The families and states in these three countries have to find a new labor supply to fill

the gap of need. One such stream of supply is constituted by immigrants of old and new. Consequently, migration becomes relevant in an arena in which care, family, and state are glued together. This introduction guides the reader through four articles that elucidate both the common and dissimilar features between the different societies.

The first article, authored by Hye-Kyung Lee, “The care labor market and the position of migrant care workers in South Korea,” highlights the current situation of the care-labor market and the working conditions for both local and migrant care workers. Lee argues that investigations on market situations and working conditions should scrutinize the Long-Term Care Insurance for the Elderly (hereinafter LTCIE) system, which was introduced in July 2008. According to Lee, many aspects of care work have been changed since the introduction of the LTCIE system, and the institutional changes have affected the Korean care-labor market, which is constituted by local and migrant care workers. First, the LTCIE system has helped to formalize the status of some care workers and expand the size of the care-labor market in Korea. The government has actively promoted the holding of a *yoyangbohosa* (care provider) certificate by using it as a qualification for a state-subsidized sal-

ary. However, despite the formalization of care work, the working conditions of *yo-yo-angbohosa* have turned out to be far poorer than initially expected.

Two articles are devoted to the situation in Taiwan. A change in family type from extended to nuclear families and an increase in women's labor participation in recent years have resulted in a shortage of women to serve as informal care providers and therefore a need for new solutions. Unlike the other care-labor-receiving countries in Asia, such as Singapore and Hong Kong (whose importation of live-in migrant workers is determined by market demand), the Taiwanese government uses medical assessment to define individuals' care needs and regulates migrant care labor accordingly. The Taiwanese case illustrates the connections between the state's migrant labor and care policies in the context of the interplay between neoliberal ideology and nationalist control of immigration.

Hong-Zen Wang's article focuses on mapping the supply and demand for care and the role of the state in creating and/or satisfying such demand. On the labor-supply side, unpaid care workers are mostly female family members who do not enter the labor market (e.g., spouses, daughters-in-law, and daughters). Four types of paid eldercare workers can be found in Taiwan: care workers, immigrants (mostly via marriage), female care workers, and nurses/nursing assistants. Wages are stratified according to legal regulations, ethnicity, and foreigner status. Wang also describes the structural dependence on migrant workers to cope with care-labor deficits. Therefore, although the policy measures dictate the recruitment of migrant workers on a short-term and temporary basis, they have become a long-term and permanent fixture in today's eldercare.

Providing a different perspective, Li-Fang Liang's article focuses on how the state recruits new workers from overseas to supply care within households but simultaneously uses the medical profession to control the influx. Such demand is partly created by employers' preferences that eldercare be arranged by families; this is supported by the strong moral stance on family care despite changes in societal values. Demand is controlled by medical examinations that qualify families to hire live-in migrant care workers; this is the context whereby the state helps to medicalize care needs. Liang's empirical evidence indicates that the Taiwanese state incorporates the Barthel Index (a measure to detect care needs) into its migrant-care-labor policy to justify its withdrawal from care provision and simultaneously reinforce the care responsibility shouldered by individual families.

The last two articles in this series involve care, the state, and migration in Japan. The first article is authored by Wako Asato; it describes the recruitment of nurses from the Philippines and Indonesia to work in Japanese care institutes. Contrary to the cases of the previous two countries, whose care migrants are driven by demand for such labor supply, the Japanese case is a supply-driven development borne from the bilateral Japan-Philippines and Japan-Indonesia Economic Partnership Agreements. In exchange for more favorable status in terms of investments, trade, and taxes, the Japanese government agreed to import nurses from both countries. The process involves not only immigration policies but also harmonization of the skills required before and after the workers come to Japan. This harmonization facilitates good care quality via training, examinations, and nurse and care-worker certification. As reluctant hosts to newcomers,

both the government and care institutes are unprepared to pursue training and certification of foreigners. Consequently, difficulty gaining certificates often results in deskilling of foreign care workers who were nurses in their home countries.

Hara Megumi's article brings another type supply of care labor from abroad into the Japanese scene—"Shinnikkei Filipinos." They are migrants who had previously come from Philippines to work as entertainers in Japan during the 1990s and later returned to the Philippines with their sons/daughters of Japanese descent. They and/or their children came back to Japan to acquire citizenship and live in Japan. When they acquire Japanese citizenship, they are matched up with a Japanese temporary employment agency, and later on, brokers and temporary employment agencies hire *Shinnikkeijin* as a source of cheap labor for many sectors. This may include employment in eldercare facilities, where they are taken advantage of for their weaknesses in terms of language difficulties or informational deficits. Hara concludes that Japanese temporary employment agencies bring *Shinnikkeijin* into the country to save on necessary expenses, such as social security. They provide intimate labor as caregivers to their children of Japanese descent, entertainers, single mothers, and care workers.

These five articles tell stories of both similar and dissimilar developments leading to the current care labor market and methods of fulfillment of migrants' demands for care. In the cases of South Korea and Japan, care labor has become more and more professionalized as a result of institutional reforms driven by different motives. In the case of Taiwan, where care work is moving out of the domestic/unpaid domain and is more and more market-oriented,

there is no demand for professionalization. By importing new foreign workers, the government cares most about immigration control on quantity; therefore, overwhelming emphasis is placed on whether or not the patient's need for care is authentic or fabricated. They design medical procedures and place medical professionals to control such demand. However, once the need is confirmed and certified, the government does not care what quality of care these patients/families receive. In other words, while immigration control has been very rigid in all these three countries, they use different measures to control the influx. The Taiwanese state places greater emphasis and energy on qualifying demand, whereas South Korea and Japan emphasize the supply side—care workers. The former intends to place barriers on applicants according to care need; the latter aims to place high hurdles against potential migrant care workers. In all three countries, the real gap between care-labor demand and supply is obscured by these immigration-control intentions. However, variations exist: states with less-comprehensive social welfare programs—such as that in Taiwan—are inclined to recruit more new migrant than local care workers.

This special issue is one of the few that brings together views of three East Asian countries in mapping their current situations in terms of care need, care work, and the impact of immigration on supply and demand. These three societies are aging, with low fertility rates, and the demand for more care workers is long-term (or even permanent). Care issues are constantly interweaved by cultures and institutions, reflecting changing boundaries between the state and family (i.e., the public and private spheres).

The Care Labor Market and the Position of Migrant Care Workers in South Korea¹

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1 INTRODUCTION

The Korean government is striving to bring about “socialization of care work” because of the changing population structure in the Republic of Korea (hereinafter Korea): the country has one of the lowest birth rates in the world and has a quickly aging population (Jones, 2010). The socialization of care work effectively means the conversion of care labor, which has traditionally fallen to women within care recipients’ families, into a public-domain area. The socialization of care work has been recently discussed in Korea for two reasons: first, it could increase women’s labor, providing a solution to growing concerns that national competitiveness might shrink after the productive Korean population begins to decline (which will occur soon after 2018; Statistic Korea 2011). It is notable that employment among Korean women typically follows an M-shaped pattern (Lee 2002, 143; Kim and Kim 2004, 204–205): women tend to be employed when single, then take breaks from their careers for marriage and childbirth, and

then resume work after their children grow up. Thus, many policies have recently been implemented to increase the compatibility between working life and home life, such as financial support for childcare and nursery care, the introduction of a childcare leave system, and free daycare for children aged <24 months. The other reason for discussion of the socialization of care work is “defamilization of care,” which entails reduction of family members’ care-work–related burden, which in turn is deeply rooted in the tradition of familism in Korea. Since the major subjects of care are infants, the sick, and older adults, a wide range of policies and programs have been prepared under the overall banner of the socialization of care work.

This paper focuses on recent policy changes aimed at older adults through the socialization of care work program. That is, by focusing on the introduction and effects of the Long Term Care Insurance for the Elderly (hereinafter LTCIE) system, which was introduced in July 2008, the paper highlights the following questions: 1) What is the current situation in

¹This work was supported by the National Research Foundation of Korea Grant, funded by the Korean Government (NRF-2010-330-B00189).

the Korean care-labor market, and what are the conditions for local and migrant care workers? 2) What has changed since the introduction of the LTCIE system? 3) How have institutional changes affected the Korean care-labor market and local and migrant care workers? Though care workers include both domestic workers and caregivers (*ganbyungin*, 看病人²), this paper primarily focuses on caregivers.

2 BACKGROUND

The trend of a declining birth rate and an aging population has emerged very rapidly in Korea. According to Statistic Korea (2011), the total fertility rate in the country—the average number of children born to each woman over her reproduc-

tive lifetime (ages 15–49 years)—reached its lowest level of 1.23 in 2010, having fallen below the replacement level of 2.0 in 1983; this is far below the 1960 level of 6.0. Meanwhile, the proportion of the Korean population aged ≥ 65 years has increased considerably—from 3.3% in 1960 to 11.3% in 2010 (Figure 1). It is estimated that almost one in every four people (24.3%) will be aged ≥ 65 years by 2030.

Statistic Korea (2011) also predicts that the population proportion of people of economically productive ages (15–64 years) will begin to decline in 2018, not only because of the increasing numbers of older adults resulting from the extension of the average lifespan, but also due to the low birthrate. Therefore, the government is very concerned that Korean society will be caught in a “support trap,” with fewer

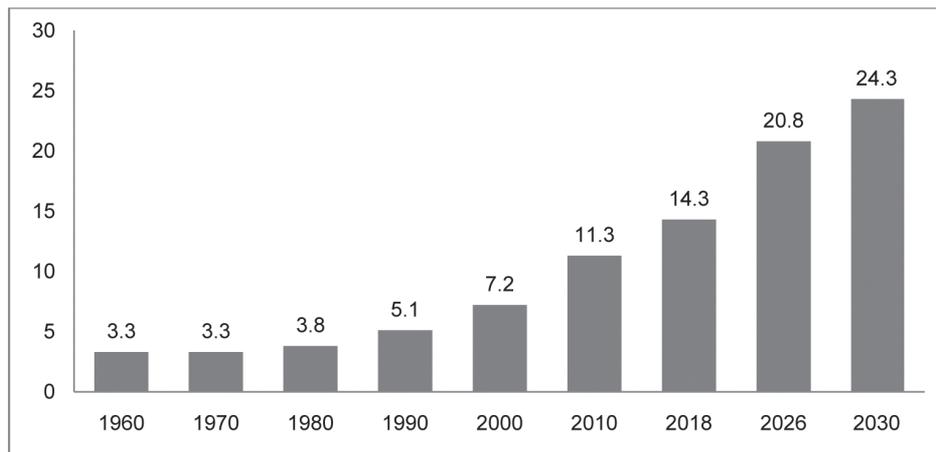


Figure 1: Percentage (%) of older adults (aged ≥ 65 years) in the Korean population, 1960–2030.

Source: (Statistic Korea 2011).

²Various names for caregivers are used in Korea, such as *yoyangbohosa* and *ganbyungin*. *Ganbyungin* has been used in Korea as a general term for a caregiver, while *yoyangbohosa* is a new term used for a specific public-sector job related to eldercare created by the introduction of the LTCIE System in 2008.

numbers of productive-aged people having to support older adults, the result being a decline in national competitiveness. Meanwhile, even though the labor-market-participation rate of Korean women has been steadily increasing, it is still very low compared with those of other Organisation for Economic Cooperation and Development (OECD) countries. Thus, the Korean government has enacted a number of policies aimed at increasing the compatibility between work and home in order to enhance the use of women's labor. One of the reasons why the Korean government operates the LTCIE system (which it has done since July 2008) is so that the increased burden of eldercare does not fall predominantly on potentially productive women.

3 THE CARE-LABOR MARKET AND MIGRANT CARE WORKERS IN KOREA

As it is an informal-sector occupation, there are few accurate, official statistics regarding care work in Korea. According to the Ministry of Health and Welfare (2011), the numbers of domestic workers and caregivers in the country were below 160,000 and 100,000, respectively. Although there are still no accurate, official statistics on the numbers of care workers in the private sector, the

2012 report of the Economic and Social Development Commission³ estimated the size of Korea's care-labor market at about 500,000 people.⁴

Table 1 illustrates the numbers of public- and private-sector care workers in Korea in 2011. The public sector is the purview of the government as part of its social-welfare program, under the aegis of which about 152,000 *yoyangbohosa* work under the LTCIE system. In addition, approximately 48,000 helpers work for social-service voucher programs administered by either the Ministry of Health and Welfare or the Ministry of Gender Equality and Family; these are geared towards low-income older adults, disabled people, and mothers and their newborn children. Meanwhile, the private sector employs roughly 90,000 *ganbyungin* and 210,000 domestic workers, who typically obtain work through employment agencies. Therefore, the 2011 numbers of public- and private-sector care workers in Korea were approximately 200,000 and 300,000, respectively.

No accurate statistics exist regarding the numbers of migrant care workers in Korea, as there is no official policy regarding the introduction of foreign care workers in Korea (unlike in Singapore and Taiwan), and also because the government has only allowed ethnic Koreans to work in some service-sector industries since the end of 2002, including domestic and care

³The Economic and Social Development Commission (formerly named the Korea Tripartite Commission) is a presidential advisory body; it was established in January 1998 for the purpose of overcoming the economic crisis of late 1997. Its purpose is to promote social dialogue among labor, management, government, and public-interest groups, and it is consulted by the government regarding labor, industrial, economic, and social policies.

⁴According to a newspaper, the size of the care-work-labor market was estimated at approximately 600,000 people (Hankook Ilbo, May 18 2011: <http://news.hankooki.com/lpage/society/201105/h2011051802403321950.htm>).

Table 1: Size of care labor market in Korea, 2011.

	Public sector		Private sector	
	Eldercare program	Voucher program	Eldercare or patient care	Domestic work
Type of worker	Yoyangbohosa	Yoyangbohosa (14,000) Assistants, postpartum helpers, child caregivers (34,000)	Ganbyungin (considerable numbers of yoyangbohosa worked as ganbyungin in 2011)	Gasagwanrisa, Domestic helers, postpartum helpers, child caregivers
Number of Workers	152,000 Total: 200,000	48,000	90,000 Total: 300,000	210,000

Source: (Economic and Social Development Commission 2012: 20).

work.⁵ Immigration policy concerning ethnic Koreans came under the domain of the Working Visit System⁶ in 2007. Within the latter system, ethnic Koreans (mostly *Josonjok*) are asked to report their type of employment to the Ministry of Employment and Labor whenever they begin or change jobs. However, the report rate amongst *Josonjok* has hovered around only 50%. In addition, as *Josonjok* tend to change jobs easily and frequently, it is very difficult to know how many of them work in care-related fields. As of July 2010, the report rate had slightly increased to 56.1% (167,000 reporting out of a total of 298,000), but only 5% (8,400) indicated that they were working in the care-work

sector (Chung et al., 2010). Extrapolating this figure to 100% of ethnic Koreans, the number of *Josonjok* care workers was approximately 15,000.

Other research on *Josonjok* women (Lee 2006; Lee et al., 2006) indicated that they preferred to work in restaurants rather than private households because of the lack of freedom, emotional stress, and lower social status associated with domestic work. Since restaurant work is generally too strenuous for aged women, whether *Josonjok* women tend to work in private households or restaurants depends on their age. Women below age 50 years tend to work in restaurants, whereas older women tend to perform domestic or care work. Therefore, most

⁵Foreign workers within the Employment Permit System who are not ethnic Koreans work in the manufacturing or agricultural/stockbreeding businesses and cannot be employed in service-sector occupations, such as domestic and care work.

⁶The Working Visit System for co-ethnics is a labor permit system that allows expatriate ethnic Koreans (or *Josonjok*) to work in certain parts of the service and construction industries. It allows for a maximum of 3 years of work during a 5-year stay. In addition, the System allows for free movement between the country of nationality and Korea for up to 5 years (termed a “plural visa”). The intention of the latter inclusion was to alleviate the problem of undocumented migration and the dissolution of *Josonjok* families in China.

Joseonjok women who stay in Korea tend to work in restaurants first and then become domestic or care workers later in life (Lee 2006, 506–509). In consideration of this, assuming that up to half the number of Joseonjok women who work in restaurants (44,000) subsequently work as care workers, the number of Joseonjok care workers in 2010 can be estimated as 15,000–55,000 (the number of care workers plus none or half of the number of restaurant workers). Nevertheless, the number of migrant care workers was low compared with the total numbers of domestic-stay foreigners (1,200,000) and Joseonjok (400,000) in Korea in late 2010.⁷

4 THE NEW LONG-TERM CARE INSURANCE FOR THE ELDERLY (LTCIE) SYSTEM

As part of the socialization of care work program, the Korean government has been operating the LTCIE system since July 1, 2008. The LTCIE system was introduced in order to provide active physical support for daily housework to people with geriatric ailments or diseases. That is, the system offers services through eldercare facilities or in-home long-term care services (home visits) to recipients. Social-welfare services for older adults were mostly aimed at low-income groups before this system was introduced. The LTCIE system caters to a wider body, with provisions for those aged ≥65 years (or those aged <65 years with Alzheimer's or other qualifying geriatric dis-

eases) who need long-term care. Prior to the introduction of the LTCIE system, residential-care facilities for older adults were classified into three categories: 1) Free facilities for those on social assistance, 2) Low-priced facilities for older adults with low incomes who were not receiving financial assistance, and 3) Full-priced facilities for those with higher incomes. The classification of free, low-priced, and full-priced residential-care facilities was removed—and all services integrated into one provisional category—under the LTCIE system (Um 2012).

After the introduction of the LTCIE system, the number of recipients receiving benefits increased from 210,000 in late 2008 to 320,000 in late 2011. The ratio of beneficiaries among people aged ≥65 years was 4.2% in 2008 and 5.7% in 2011 (Table 2).

Meanwhile, between 2008 and 2011, the numbers of in-home and facility-based care centers increased 1.6- and 2.4-fold (by 10,857 and 4,061, respectively), yielding higher service accessibility (Figure 2). As shown in Figure 2, the total number of in-home and facility-based care centers increased considerably—from 8,300 in 2008 to 14,600 in 2009. This number then stayed relatively stable, with 14,900 such centers in operation in 2011. Figure 2 also highlights the fact that the majority of care centers have traditionally been in-home ones, although their relative proportion has decreased slightly over time. Hence, the proportion of in-home care centers was 80% and 73% in 2008 and 2011, respectively, as the government relaxed the standards required for the establishment of

⁷In late December 2010, there were 1.2 million foreigners staying in Korea, among whom nearly 0.7 million were migrant workers. Of them, 220,000, 280,000, and 200,000 foreign workers held E-9 visas under the Employment Permit system, held H-2 visas under the Visit and Employment system for co-ethnics, and were undocumented migrants, respectively; a further 210,000 were marriage migrants (200,000 women). Joseonjok made up over 400,000 of this total.

Table 2: Number of beneficiaries of the LTCIE system, 2008–2011.

	2008	2009	2010	2011
Total Number of Older Adults (Aged ≥65 Years) in Korea	5,086,195	5,286,383	5,448,984	5,644,758
Percentage of Older Adults (Aged ≥65 Years) in Korean Population	10.2%	10.5%	10.8%	11.1%
Number of LTCIE Applicants	355,526	522,293	622,346	617,081
Number of Approved LTCIE Applicants	214,480	286,907	315,994	324,412
Approval Rate	60.3%	54.9%	50.8%	52.6%
Percentage of LTCIE Beneficiaries out of Total Older Adults (Aged ≥65 Years)	4.2%	5.4%	5.8%	5.7%

Source: (National Health Insurance Corporation 2008b, 2009b, 2010b, 2011b).

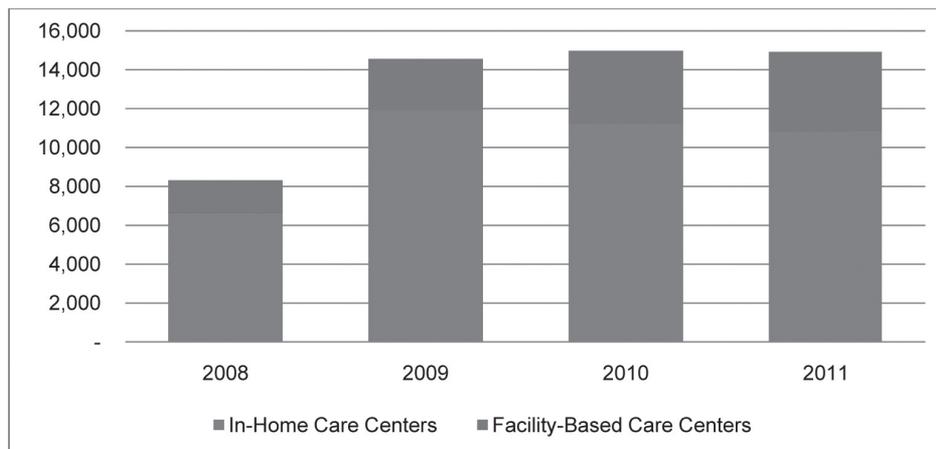


Figure 2: Numbers of In-Home and Facility-Based Care Centers, 2008–2011.

Source: (National Health Insurance Corporation 2008b, 2009b, 2010b, 2011b).

in-home care centers alongside the implementation of the LTCIE system. The main activities of in-home care centers are home-visit care and home-visit bathing.

Major Care Providers for Long-Term Care Recipients

Figure 3 indicates the identities of the main providers of long-term care for Korean recipients: the recipients' children (including

daughters-in-law). However, there are some notable peculiarities in the gender of long-term care recipients. Figure 4 shows that in 2008 (the early stage of LTCIE system introduction), spouses were the most common caregivers of men who were long-term care recipients (50%), followed by paid caregivers (22%) and the recipients' children (15%). Then, this pattern changed by 2010–2011 (2–3 years after system implementation), as

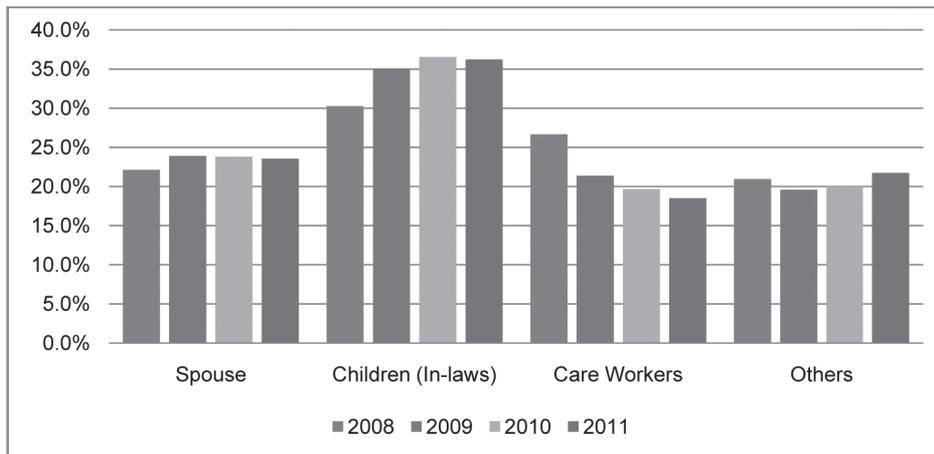


Figure 3: Major care providers for long-term care recipients.

Source: (National Health Insurance Corporation 2008b, 2009b, 2010b, 2011b).

the second- and third-most-common caregivers of men became their children (18%) and paid caregivers (17%), respectively. Meanwhile, the most common care providers for women who were long-term care recipients were their children (Figure 5), followed by paid caregivers. However, the proportion of paid caregivers for women has declined slightly over time, while the proportion of their children acting as caregivers has increased since 2008.

Figures 4 and 5 show that the percentage of paid caregivers as primary care providers has decreased by approximately 7%–9%, while that of children (including daughters-in-law) has increased by about 2%–8%, over the 2–3-year period since the introduction of the LTCIE system. As the number of paid caregivers has declined, the task has fallen to children also known as “family yoyangbohosa.” One reason for this development is that the government actively

promoted the acquisition of yoyangbohosa certificates to increase the supply of yoyangbohosa when the system was first introduced; thus, family members were encouraged to acquire one to earn money while caring for their older relatives. Such family members became known as family yoyangbohosa. However, when the number of family yoyangbohosa had increased considerably by 2010, it was observed that many family yoyangbohosa did not actually provide adequate (or sometimes any) care and instead simply took the stipend. Hence, the government reduced the benefits of being a family yoyangbohosa in 2011; reforms included a reduction in their wage, which was cut to half its previous level.⁸

Prior to 2008, there was no requirement for care workers—such as domestic workers or caregivers—to hold any type of certificate in Korea. However, a national level 1 or level 2 certificate became required when

⁸A registered family yoyangbohosa earned about 400,000 won monthly when caring for a family member in 2008. However, since the law changed on August 1, 2011, the monthly stipend has been halved to 200,000 won.

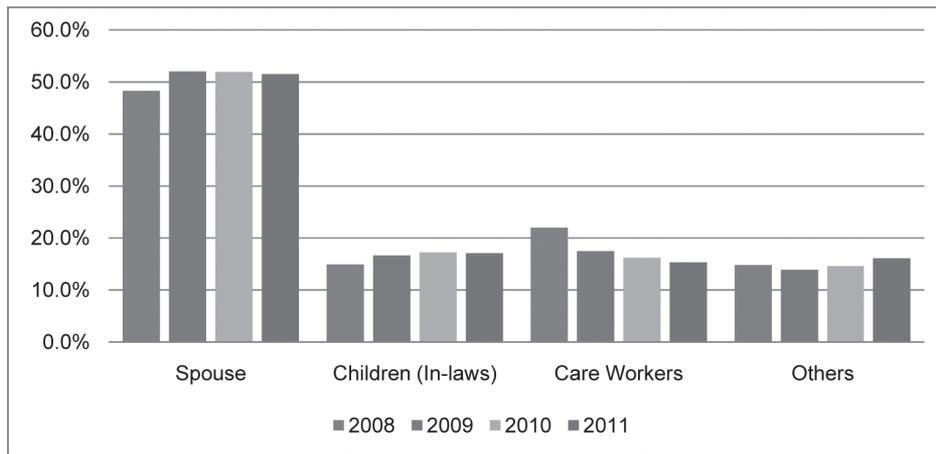


Figure 4: Major care providers for male long-term care recipients.

Source: (National Health Insurance Corporation 2008b, 2009b, 2010b, 2011b).

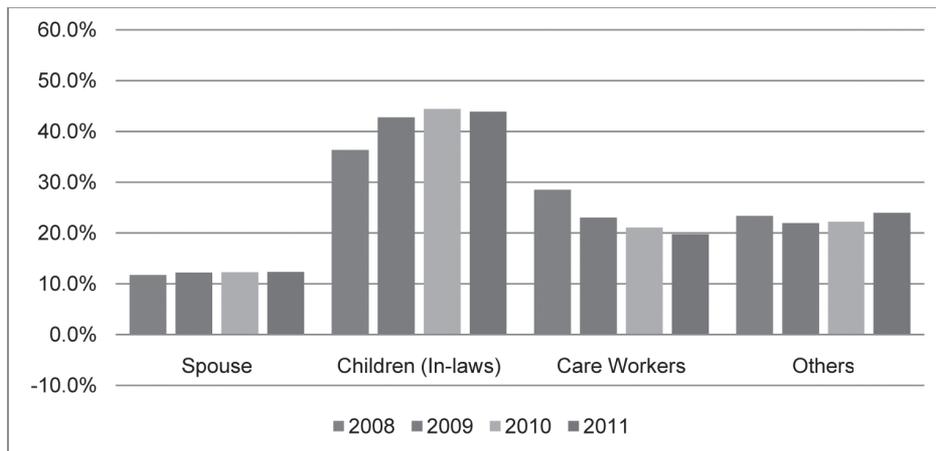


Figure 5: Major care providers for female long-term care recipients.

Source: (National Health Insurance Corporation 2008b, 2009b, 2010b, 2011b).

yoyangbohosa were introduced through the LTCIE system in 2008. At the outset, a yoyangbohosa certificate could be obtained after taking only a 240-hour education course at a relevant educational institute. However, with the revision of subordinate regulations to the Welfare of the Aged Act in April 2010, satisfactory passage of the newly instituted yoyangbohosa qualification

examination was added to the requirements to obtain a yoyangbohosa certificate (in addition to the 240-hour education course).

Figure 6 shows the numbers of yoyangbohosa certificate holders and those who are employed. The number of people with yoyangbohosa certificates has increased dramatically—from 340,000 in 2008 to more than 1 million in 2011. The increase in certificate

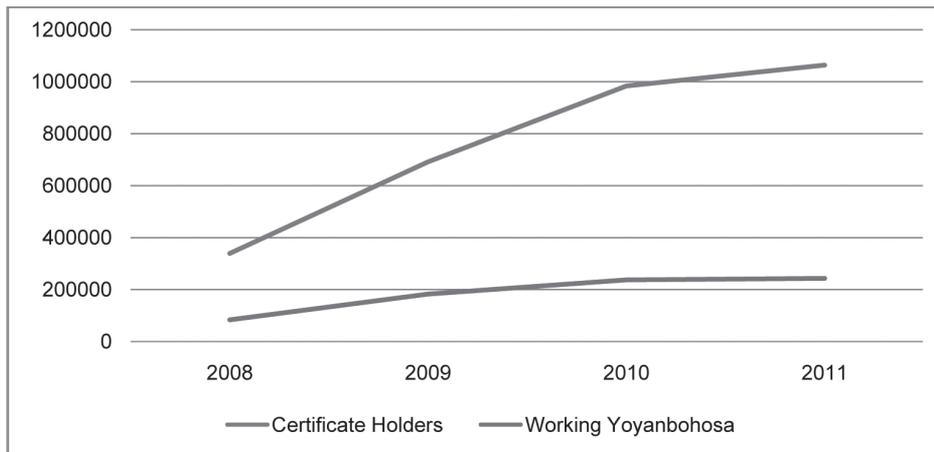


Figure 6: Numbers of Yoyangbohosa, 2008–2011.

Source: 2008: (Economic and Social Development Commission 2012: 130).

2009–2011: (National Health Insurance Corporation 2009a, 2010a, 2011a).

holders has slowed since April 2010, at which time the new national examination was introduced. Not only the added obstacle of the national examination but also the excess of yoyangbohosa in 2010—2 years after the system was implemented—caused the slowdown. Indeed, it is notable that only a quarter of yoyangbohosa certificate holders have been working since 2010. The reason for this trend is the scarcity of jobs due to oversupply of yoyangbohosa relative to the care demanded. A secondary reason is that many women obtained certificates in advance, expecting to care for their family members later.

The background against which the oversupply of yoyangbohosa arose was the government's overemphasis on establishing the necessary framework for the LTCIE system. Efforts were focused on encouragement and attraction of caregivers from the private sector to supply services through the new public framework. Infrastructure was expanded, and national labor and facility standards—which were seen as barriers to entry by service providers—were

drastically relaxed; the government was motivated by its fear of criticism should it create an LTCIE system without an effective service infrastructure.

These observations gain extra weight when the recent changes in yoyangbohosa educational institutions are examined. From the outset, the establishment of yoyangbohosa educational institutions was based on a reporting system whereby institutions simply had to report that they were operating. This was permitted in order to allow the institutions to flourish and multiply rapidly. However, as time progressed, there were simply too many educational institutions. As a consequence, regulations under the Welfare of the Aged Act were amended in April 2010, and yoyangbohosa educational institutions came to follow a designatory system. Figure 7 illustrates the consequence of this change: the number of yoyangbohosa educational institutions reached a peak in 2009—a year after the implementation of the system—and has decreased slightly since 2010.

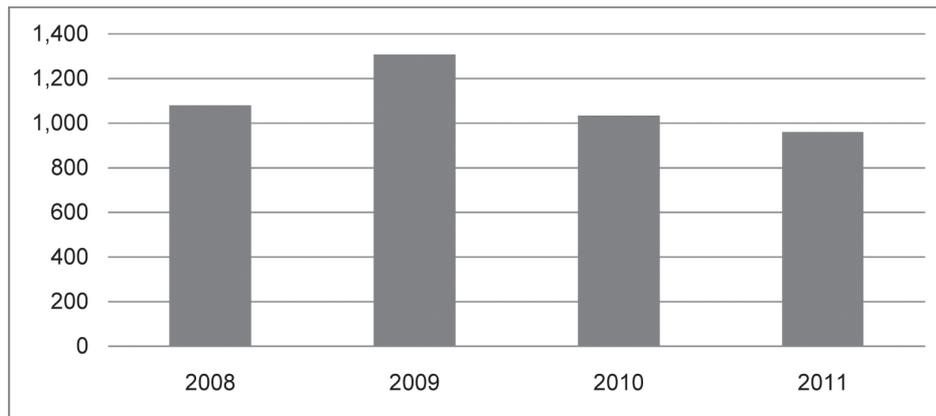


Figure 7: Numbers of Yoyangbohosa Educational Institutions, 2008–2011.

Source: (National Health Insurance Corporation 2008a, 2009a, 2010a, 2011a).

Working Conditions of Care Workers

Table 3 illustrates the working conditions of care workers, focusing on yoyangbohosa and ganbyungin, while also providing reference information on domestic workers. According to previous research (Oh et al., 2009; Chu 2011; Economic and Social Development Commission 2012), yoyangbohosa are primarily homemakers aged 40–50 years, and 75% of them have obtained high-school diplomas. Many yoyangbohosa who practice through in-home care centers work part-time, while those working through facility-based care centers are usually employed full-time. However, in both types of care centers, the employment of yoyangbohosa tends to be irregular.⁹

The National Health Insurance Corporation (NHIC) set the minimum yoyangbohosa wage at the moderate level of 7,000

won per hour in 2011.¹⁰ In practice, each care center sets the remuneration rate for yoyangbohosa differently. Care centers are required to subscribe to the four major Korean social-insurance schemes, such as industrial accident compensation insurance, employment insurance, the national pension, and national health insurance. However, 20% of facility-based centers and 44% of in-home care centers did not subscribe to these insurance programs in 2009 (Table 3).

Similarly, ganbyungin are typically women aged ≥ 50 years. Most of them work for a full 24 hours providing care constantly, taking breaks to sleep only when time permits, with daily wages of approximately 60,000 and 70,000 won for working in general and intensive-care wards, respectively. Their hourly pay rate is therefore less than 3,000 won. Most ganbyungin seek employment via connections through

⁹A considerable number of yoyangbohosa are irregular workers, because they are employed via annual rather than permanent contracts (MEDICAL Today, July 02, 2012: <http://www.mdtoday.co.kr/mdtoday/index.html?no=193409>).

¹⁰The minimum hourly wage was 4,320 Korean won in 2011.

Table 3: Employment conditions of care workers, 2011.

	Public sector	Private sector	
	Yoyangbohosa	Ganbyungin	Domestic workers
Formal Labor Status (A)	Recognized Worker	No Recognition	No Recognition
Percentage with an Employment Contract (A)	86%	17%	No Employment Contracts
Method of Obtaining Employment (A)	Educational Institutional Placement: 55% Personal Connections: 17% Employment Agencies: 15%	Personal Connections: 31% Ganbyungin Associations: 27% Employment Agencies: 19%	YWCA, Local Welfare Centers, Employment Agencies
Method of Payment (B)	In-home Centers: Hourly Facility-Based Centers: Monthly	Daily or Monthly	Hourly, Daily, or Monthly
Hourly Pay (B)	Minimum of 7,500 won	2,500 won	Minimum of 7,000 won
Average Daily Wage (C)	Not Applicable	60,000–70,000 won (for 24 Hours)	70,000–80,000 won (for 8 Hours)
Average Monthly Wage (A)	Average: 1.09 Million Won In-home Centers: 1.03 Million Won Facility-Based Centers: 1.15 Million Won	1.2 Million Won	Visiting Type (Work 5 Days per Week): 1.4 Million Won Live-In Type (Work 5 Days per Week): 1,600,000 Won (C)
Average Working Hours per day (A)	Average: 9 hours In-home Centers: 8 hours Facility-Based Centers: 10 hours	20 hours	Visiting Type: 4 hours or 8 hours (C)
Percentage Subscribed to the 4 Major Categories of Employment Insurance (A)	Facility-Based Centers: 80% In-Home Centers: 56%	28%	None

Sources: (A) (Oh et al., 2009); (B) (Economic and Social Development Commission 2012); (C) Author's Personal Observations.

people they know, dispatching, or employment agencies (31%, 27%, and 19%, respectively). General hospitals usually introduce patients to a ganbyungin, and then patients (or their guardians) can employ either that ganbyungin or another of whom they know. The employed ganbyungin then receives a simple daily wage. However, specialist eldercare hospitals tend to form contractual relationships with private employment agencies, such as the Korea Patient Helper Society. Eldercare hospitals prefer to employ Josonjok, because their

real daily wage is less than that for locals: Josenjok tend to accept 24-hour shifts with room and board provided, unlike locals, who prefer to commute from their own homes to work 8-hour shifts.

The number of private ganbyungin employment agencies was approximately 1,700 nationwide in 2011 (Kim 2007; Park 2010; Chu 2011). These agencies operate and manage ganbyungin through membership systems whereby joining fees of approximately 100,000 won and monthly membership fees of 25,000–60,000 won are

required from the ganbyungin. Across all such agencies, the majority of ganbyungin (83%) work without any employment contracts, and a mere 28% are able to participate in one of the four major Korean social-insurance schemes (Table 3).

Yoo (2011) conducted research in the fields of yoyangbohosa working in elder-care facilities and ganbyungin working in geriatric hospitals in Korea's Daegu-Gyeongbuk region in September–October 2011. He found that the groups differed in terms of payment method: yoyangbohosa and ganbyungin were typically paid by the hour and the month, respectively. Despite these differences, both groups enjoyed similar working conditions; Yoo (2011) also observed that 85% of both yoyangbohosa and ganbyungin made monthly salaries of 1.01–1.5 million won. While most ganbyungin preferred to change their employment from the private to public sectors (i.e., becoming yoyangbohosa) in the early stages of the LTCIE system, Yoo (2011) noticed that many yoyangbohosa certificate holders were in fact employed as ganbyungin in 2011. The most significant reason given for this was the difficulty of acquisition of appropriate jobs because of the oversupply of yoyangbohosa.

One reason why most care workers in Korea are women aged ≥ 50 years is because few of them can find jobs in other service industries. Indeed, many jobs with better conditions are staffed by members of younger generations, who tend to avoid 3-D (Dirty, Difficult, and Dangerous) jobs. Older women in Korea are typically less educated than their younger counterparts and thus generally obtain jobs with poorer

conditions. As a result, older women tend to gravitate toward the service sector jobs shunned by their younger counterparts.

Recently, competition among yoyangbohosa for jobs has intensified as openings at small-sized in-home care centers have increased; this trend has resulted in shrinking incomes and worsening employment conditions. According to research on actual working conditions (Institute of Medical and Welfare Resources 2012), the average monthly net income of yoyangbohosa based on 40 hours per week of work and excluding the four major insurance premiums is currently 670,000 and 910,000 won at in-home and facility-based centers, respectively (*Medical Today*, July 02, 2012; *Joong Ang Il Bo*, July 03, 2012).

Therefore, on July 1, 2012, the National Human Rights Commission of Korea¹¹ recommended that the Ministry of Health and Welfare and the Ministry of Employment and Labor take measures to alleviate problems for care workers. The suggestions included more encompassing and stringently enforced salary levels, monitoring of methods of labor placement (e.g., employment agencies), and enactment and enforcement of rules related to employment conditions, such as excessive working hours and sexual harassment.

Thus, at this time, 4 years after the LTCIE system was introduced, criticism in relation to the large-scale unemployment and poor working conditions of yoyangbohosa are growing. Many of these problems have been blamed on the oversupply of yoyangbohosa and the excessive competition among care institutions due to the government's policies of marketization and deregulation. Accordingly, on July 1, 2012 (the 4th anniversary

¹¹National Human Rights Commission of Korea (http://www.humanrights.go.kr/04_sub/body02.jsp?m_link_url=04_sub/body02.jsp&m_id1=72&m_id2=75&m_id3=&m_id4=?NT_ID=24&flag=VIEW&SEQ_ID=605194), accessed on July 11, 2012.

of the LTCIE system's introduction), labor, civic, welfare, and public-interest legal organizations—including the Korean Care Workers' Association—formed the “Joint Measure Committee for the Complete Revision of the LTCIE Law.” This Committee has been applying significant pressure on the government for the reformulation of the current law. It is the Committee's opinion that revisions ought to: 1) Expand the size and capacity of national and public long-term care institutions by 30%. 2) Ensure adequate wages for both yoyangbohosa and ganbyungin. 3) Pay subsidies to yoyangbohosa directly out of the governmental purse rather than through care centers. 4) Ensure a maximum workday of 8 hours for both yoyangbohosa and ganbyungin. 5) Acknowledge ganbyungin as a recognized and legitimate category of labor. 6) Change the current reporting system for long-term care institutions to a permit system supervised and managed strictly and directly by the government.¹²

5 THE EFFECTS OF THE LTCIE SYSTEM

The LTCIE system has helped to formalize a segment of care workers and expand the size of the care-labor market in Korea. Particularly, it has created the new employment category of yoyangbohosa, which employed 240,000 people in late 2011. However, despite the formalization of this category of care work, the working conditions of yoyangbohosa have been far poorer than initially expected. In addition, ganbyungin and other domestic workers still operate in the informal sector under even worse employment conditions.

Yoyangbohosa has not become a decent occupation for a number of reasons: First, there are simply too many yoyangbohosa. Second, governmental policy has resulted in the creation of too many in-home care centers; the stark competition among them has resulted in low profit margins for businesses in the industry. This has meant poor job security for yoyangbohosa, as they can easily be replaced, their wages are depressed, and they may be asked to work fewer hours as their agencies divide available work between employees. Furthermore, the nature of the yoyangbohosa job itself is not particularly stable due to the general instability in the industry. In other words, the implementation of the LTCIE system expanded the quantitative size of the care-labor market but failed to improve working conditions or quality of care.

Similarly, the social status of care work has not been improved by the LTCIE system. Care workers have not had a particularly high social standing in Korea; the LTCIE system has not changed this, despite the government's efforts to turn care workers into yoyangbohosa by requiring 240 hours of education and a passing grade on a national examination. Indeed, yoyangbohosa have been ridiculed in the national press and described as “nationally recognized domestic workers” and “not true professionals” (No Nyun Si Dae News, July 13, 2012).

One important reason for this lack of social recognition has been that the LTCIE system has failed to make any attempt at defeminization, despite its focus on the defamilization of eldercare work. As a result, though the new job category of yoyangbohosa was expected

¹²Korean Care Workers' Association (<http://www.care119.net/xs/notice/2175>). Accessed July 03, 2012.

to professionalize the sector, it remains seen as a pink-collar job for middle-aged or older adults and not a career option for all. With professionalization in name only for *yoyangbohosa*, their real social status is little different from that of *ganbyungin*, their immediate predecessors and current coworkers.

Care work has been the purview not just of local Korean labor but also of certain foreign groups, such as *Joseonjok* and marriage migrants, who can work as caregivers in Korea. Indeed, considerable numbers of *Joseonjok* have worked as care workers (Lee 2004; Lee et al., 2006). Korea does not operate any system to recruit foreign caregivers or migrant domestic workers to work for low wages, as occurs in Singapore, Taiwan, and other nations. The principle of both the Employment Permit System and the Working Visit System is to establish fundamental parity between the treatment of foreigners and Korean citizens. Thus, at least officially, wages and employment conditions should not differ between foreigners and Koreans with comparable positions. In reality, however, there are some differences between those two groups of workers. For example, while Korean care workers generally enjoy hourly or daily wage systems of 8-hour workdays, many *Joseonjok* women work 24-hour shifts, effectively living in the houses or hospitals where they are employed. The daily wage is similar between Koreans and *Joseonjok* (approximately 60,000 won/day in 2010). However,

local workers are usually given one paid day off per week (typically a Sunday), whereas an unpaid day off is given to *Joseonjok*. In the case of live-in domestic workers, while local workers commonly work 5 days per week and earn 1.4 million won per month, *Joseonjok* workers usually work 6 days per week for the same money. Korean workers who worked 6 days per week were typically paid 1.6 million won per month in 2011.¹³

Prior to the implementation of the LTCIE system in 2008, when the supply of *ganbyungin* was less than that demanded for care work, *Joseonjok* women aged ≥ 50 years constituted the primary Korean workforces for domestic workers in private homes and *ganbyungin* in hospitals and care centers (Lee et al., 2006). After the implementation of the LTCIE system in 2008, most local women who had been working as *ganbyungin* changed their status to *yoyangbohosa* (Park 2010; Um 2012),¹⁴ because *yoyangbohosa* were expected to have better employment conditions and pay. When most available *yoyangbohosa* positions were filled by 2010, a considerable number of Korean women with *yoyangbohosa* certificates opted to work as *ganbyungin*. Since 2010, the influx of Korean workers has been pushing *Joseonjok ganbyungin* out of better jobs. Now, Korean *ganbyungin* primarily provide one-to-one care in general hospitals, while *Joseonjok ganbyungin* provide group care to 4–6 patients at a time in nursing homes (Choi 2010; Hong et al., 2010; Park 2010).

¹³This has been directly observed by the current paper's author while searching for and employing Korean and *Joseonjok ganbyungin* and domestic workers to care for her 88-year-old, ailing mother-in-law since October 2010.

¹⁴Research conducted in April–May 2009 (Park, 2010) revealed that many Korean *ganbyungin* had moved to care centers by obtaining *yoyangbohosa* certificates and that the “leftover” *ganbyungin* employed in geriatric hospitals were mostly *Joseonjok*.

Current Numbers of Foreign Yoyangbohosa in Korea

In relation to the education of yoyangbohosa, ethnic Koreans (Josonjok) under the Working Visit System and marriage migrants have been able to acquire yoyangbohosa certificates since the introductory stages of the LTCIE system once they have “sufficient Korean ability” (Ministry of Health and Welfare 2008, 168–169). Besides Josonjok and marriage migrants, permanent residents with denizenship have also been permitted to obtain yoyangbohosa certificates since 2010 (Ministry of Health and Welfare 2012, 6). Thus, the types of visas that allow foreigners to undergo yoyangbohosa education are: 1) An F-2 (Residency) visa issued to the spouse of a Korean national, 2) An H-2 (Working Visit) visa, 3) An F-4 (Overseas Koreans) visa, and 4) An F-5 (Permanent Residence) visa. All are subject to the preliminary requirement of a satisfactory score on the Test of Proficiency in Korean examination.

However, no statistics are available regarding the number of domestic-stay foreigners who have taken courses or examinations or obtained yoyangbohosa certificates. As of June 2011, only 314 foreigners (including permanent residents) were employed as yoyangbohosa.¹⁵ This low level of par-

ticipation in the yoyangbohosa occupation for Josonjok, marriage migrants, and permanent residents in Korea is explicable in several ways. Primarily, and particularly in the case of Josonjok, employment has never been assured by the acquisition of a yoyangbohosa certificate, and the time and cost of the 240-hour course is a real burden for many. Thus, they have tended to avoid the difficulty of entry into the profession, instead working as ganbyungin.¹⁶ Another factor is that while local, female Korean workers prefer to work as daily yoyangbohosa in care institutions or visit clients' homes as part-time workers, Josonjok favor working as ganbyungin on a 24-hour basis, as this also provides them with room and board. In this way, they can save as much money as possible during their 5-year stay in Korea. Therefore, Korean ganbyungin tend to work in general hospitals, while Josonjok ones tend to work in specialist-care and geriatric hospitals.

When marriage migrants are naturalized as Korean citizens, they come to be categorized as local Korean residents. Therefore, among those classified as Koreans, there are unknown numbers of naturalized marriage migrants who work as yoyangbohosa.¹⁷ However, there is no way of knowing how many naturalized

¹⁵Statistics related to foreign yoyangbohosa certificate holders have not been produced yet; however, the number of foreigners who work as yoyangbohosa could be calculated from databases related to long-term care laborers, which were kindly provided by representatives of the LTCIE system at the researcher's request.

¹⁶The educational expense of the 240-hour yoyangbohosa educational course was 400,000–800,000 won during 2010–2011. This expense is reimbursed by the government to low-income Koreans (i.e., those who earn less than 150% of the predetermined minimum cost of living). There is no such benefit for Josonjok.

¹⁷According to Kim et al., (2009), 33% of female marriage migrants in Korea were naturalized in 2009. The percentage of naturalization was high for Josonjok, Filipino, Chinese, Vietnamese, and Japanese people (59%, 43%, 23%, 12%, and 5%, respectively).

marriage migrants work as yoyangbohosa. Recently, several reports (Kim et al., 2010, 106, 118; Yang et al., 2010) have suggested that yoyangbohosa work is highly desirable for female marriage migrants, as the yoyangbohosa program is open to people of all ages, educational backgrounds, and classes. Pragmatically, yoyangbohosa work also brings a certain amount of money into the families of marriage migrants, who have to provide care for their parent(s)-in-law. However, in reality, there do not appear to be significant numbers of female marriage migrants working as yoyangbohosa yet.

In summary, both Josonjok and marriage migrants have particular handicaps in the Korean care-labor market. That is, although there are no theoretical obstacles to the performance of care work by Josonjok, local employers are concerned about hiring them for reasons of the client security and safety, as Josonjok tend to leave their employment with short or no notice. Many local employers consider marriage migrants from Southeast Asian countries (such as Vietnam or the Philippines) too young to work in the field. Indeed, Southeast Asian marriage-migrant women often lack skills and experience and encounter cultural obstacles and serious language barriers. Thus, to date, female marriage migrants from Southeast Asia rarely work as care workers in practice.

6 CONCLUSION

This paper has examined the current situation in the care labor market in Korea and the changes caused by the LTCIE system, which was introduced in July 2008. Closer consideration should now be given to the effects of the LTCIE system on the care-labor market in Korea.

Since the implementation of the LTCIE system in 2008, the size of the domestic care-labor market has expanded. The relative proportion of employees in each service area has also been affected. As shown in Figure 6, roughly 240,000 yoyangbohosa were employed in 2011; Table 1 indicates that about 166,000 and 74,000 of them worked in the public and private sectors, respectively, the latter as ganbyungin (with yoyangbohosa certificates). As no accurate statistics have been published regarding the numbers of care workers prior to 2008, it is difficult to determine exactly how much the care-labor market has expanded due to the introduction of the LTCIE system. However, by creating the new occupation of yoyangbohosa, the implementation of the LTCIE system has had the side effect of increasing the numbers of ganbyungin. Conversely, the number of domestic workers is likely to have decreased, as demand for them was replaced by that for yoyangbohosa, as family members who used to hire domestic workers to care for their older or sick relatives can now place them in eldercare facilities or receive assistance from yoyangbohosa. Meanwhile, with respect to supply, many low-income, middle-aged homemakers who used to work part-time as domestic workers have moved to other jobs, such as yoyangbohosa or voucher program work, the latter of which has also increased in popularity since 2008.

Despite marginal gains, the current size of the care-labor market has not realized the government's original 2008 plan to create 200,000 jobs per year during the implementation stages of the LTCIE system (Park 2010). Furthermore, even though the vast majority of Korea's national workforce now pays insurance premiums for the LTCIE system, only about 6% of older adults currently see any benefits therefrom. Table 2 clearly illustrates problems with

system coverage in terms of raw numbers of people. Though only 4 years have elapsed since initial system implementation, the 6% coverage figure is much below average for OECD members (No Nyun Si Dae News 2012). Therefore, it would seem that the care-service supply in Korea has yet to satisfy actual demand.

Meanwhile, a qualitative advantage is that some types of care work (e.g., *yoyangbohosa*) have become officially recognized as legitimate jobs. However, care work has not become socially recognized as a decent job or a viable career choice because the working conditions are still too poor and the social perception of the field too low. Potential methods of raising the status of care work might include improvement in salaries and working conditions and recognition and legitimization of all areas of care work. There were 500,000 care workers in Korea in 2011, of which only 166,000 *yoyangbohosa* and 34,000 voucher-program workers in the public sector had been recognized as practicing a legitimate form of labor. The remaining 300,000 care workers working in the private sector had no official recognition as laborers and consequently no legal protections under Article 11 of the Labor Standard Act.

Thus, two urgent problems related to caregivers need to be addressed. The first is the need for comprehensive application of the Labor Standard Act. The second is the need for improved salaries and working conditions. Efforts to tackle the first of these issues have only recently commenced (Ha 2011). Organizations such as the

National House Manager's Cooperative have demanded that the government acknowledge paid housekeepers as official laborers through ratification of the International Labour Organization's "Convention on Decent Work for Domestic Workers."¹⁸ In relation to the second issue, both government and non-governmental organizations have attempted to ensure that some *ganbyung* (caregiving) service is covered by National Health Insurance (Hwang 2010).¹⁹ However, even though *yoyangbohosa* who work in the public sector are acknowledged as laborers, their working conditions are still poor and their social standing low. Therefore, significant general improvements in working conditions for the whole sector are needed to bring about any real social change.

Since very little research related to migrant care workers has been conducted in Korea, it is difficult to determine the effects of the LTCIE system for migrant care workers. As previously noted, the LTCIE system has not yet driven any broader changes in the social status of care work; further, *Joseonjok* and other migrant care workers suffer from the contempt of the general Korean public, which unfortunately translates into very real discrimination in all areas. Thus, migrant care workers—who have even lower social standing than their Korean counterparts—are often used by employers and customers in a fashion akin to slave laborers. Following the concurrent implementations of the LTCIE and *yoyangbohosa* systems, the typical places of work

¹⁸The treaty was adopted at the 100th General Conference of the International Labour Organization on June 1, 2011, following recommendations made in the "Decent Work for Domestic Workers Report" (1).

¹⁹Amendments to the National Health Insurance Act are contained in a bill that has been pending with the National Assembly since 2011 (Hwang 2010).

for migrant and Korean care workers have been altered: many local Korean workers changed occupations from ganbyungin to yoyangbohosa, while most Josonjok remained as ganbyungin. Recently, many local Korean workers have also begun to work as ganbyungin, which has pushed the Josonjok workers into performing group-care functions in live-in nursing homes.²⁰

Even though Josonjok women have been providing care-work services (e.g., ganbyungin and domestic worker) for a considerable time in Korea, no official policy review has aimed to institutionalize their services. The reason for this lack of governmental attention is that the employment rate among local Korean women is not yet high; therefore, the government's view is that an ample supply of local Korean women is available to fill care-worker positions (Lee 2005; Lee 2006). As the employment rate of local women and the demand for care work increase, the government might view foreign care workers as a more favorable option.

Though the media have recently focused on the problem of too many yoyangbohosa (No Nyun Si Dae News, July 13, 2012), some care centers in rural areas of certain provinces cannot find enough yoyangbohosa to meet demand. Particularly, underpopulated, rural areas—such as farming and fishing villages—are generally experiencing acute labor shortages in all fields, unlike urban areas. In addition, many local yoyangbohosa avoid jobs with poor working conditions and “cherry pick” better positions. Therefore, over time, foreign yoyangbohosa may come to fill these vacant positions.

Furthermore, as it is estimated that about a quarter of the Korean population will be aged ≥ 65 years by 2030, and especially when the post-(Korean)-war baby boomers enter their 80s beginning in 2035, the supply of local care workers is expected to be insufficient. It is doubtful that Josonjok will still provide care services in Korea at that time, considering the Josonjok population structure in China. Alternatively, or in conjunction with Josonjok, Southeast Asian migrants—including marriage migrants—may come to play a more significant role. As Korea is still a divided country, unification between the North and South may provide the necessary labor by that time. More attention has been given to this possibility than to any idea of officially importing labor from other countries with the exception of the spotlight given to the Josonjok and female marriage migrants.

In conclusion, to a certain degree, the LTCIE system has helped to bring about the socialization/defamilization of care work for older adults. There were many difficulties for immediate family members of individuals with debilitating conditions such as Alzheimer's disease, as extended families had tended to think under the traditional doctrine of familism that the task of care should fall to an appropriate family member—usually the wife of the first son—and little thought was given to the impact on her career or lifestyle. However, such thinking has begun to change, and many families now opt to send their sick relatives to long-stay care facilities. However, for older adults with less-acute ailments, there remains a preference for assistance in the form of home-visit care and home-visit bathing

²⁰A similar situation was noticed for domestic workers; that is, while the majority of Korean local workers are employed on a daily or hourly basis, Josonjok tend to work as rather isolated live-in domestic workers (Lee et al. 2006).

rather than admission into a long-term-care facility. This preference is reflected by the fact that 22% of yoyangbohosa in home-care centers were family yoyangbohosa in 2011; this trend illustrates that the tradition of familism is still strong in Korea.

Meanwhile, in an attempt to erode familism further, there has been discussion about institutionalization of care work for general patients similar to that already implemented for older adults through the LTCIE system. The government is currently grappling with the concept of insurance coverage and what types of general care should fall within the current national insurance programs. Central ministries and some local governments have begun operating “wards without guardians” as trials for future programs.

Thus, the LTCIE system has contributed to the process of defamilization of care work in Korea; however, little progress has been made in terms of defeminization of care work. Indeed, the latter has neither been a stated policy goal nor come to the general public’s attention through avenues such as the media. Simply put, it is still taken for granted that female care workers should be responsible for taking care of older adults, other patients, and babies. Success in the defeminization of care work would revitalize the care-labor market in Korea both quantitatively and qualitatively, making it more likely to be considered a true profession.

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The Care Deficit and Migrant Workers in Taiwan

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Care deficit is now a common situation in East Asian society, in which the population is aging while the fertility rate continues to decline (Jones and Shen 2008). Taiwan joined the “aging society club” after the late 20th century, with its ratio of people aged >65 years reaching 10.89% in 2011 (Ministry of Interior 2012). Societies cope with such deficits in eldercare in different ways according to their values and the historical trajectories of the involved institutions.

1 ESTIMATION OF POPULATION CHANGE

In 1988, the proportion of the population aged >65 years was only 5.7%, while by 2011, that figure had increased to 10.89% (see Table 1). Industrialization brings urbanization, and most Taiwanese families are nuclear families living in cities. The ideology that old parents should live with their children—especially sons—is still prevalent, so the government does not have to provide general care support for elderly. However, when the family is no longer sustainable by only one income, it is hard for them to take care of older adults by keeping the

wife or husband at home. In addition, as Table 2 shows, an increasing number of aged couples live alone without their children; this proportion has increased from 19.6% (1992) to 29.2% (2002), a significant increase of 10% in 10 years. The population proportion of the three-generation family type with persons aged over 65 reduced 43%–33% in the same period. In other words, the traditional family-care system is no longer sustainable. To deal with this care crisis, the government has allowed people to hire migrant workers to care for older adults since 1992. Now, the migratory regime has been incorporated into the social-care system, together with other institutions, to tackle the care-deficit problem.

2 MIGRANT WORKERS—EMPLOYMENT TRENDS

Figure 1 shows the trends with respect to the hiring of migrant workers since 1998. The government has claimed from the outset that the importation of migrant workers is “supplementary” and that all migrant workers have to leave after their contracts expire. In the first few years, the policy allowed

Table 1: Selected demographic data from Taiwan, 1975–2007.

Year	Population	Number of women aged 15–49 years	Total fertility rate (‰)	Newborn babies	Unmarried men aged 30–44 years	Unmarried women aged 30–44 years	Percent aged >65 years	International migration	
								Inbound	Outbound
1975	16,223,089	3,919,805	2,840	369,349	131,754	44,081	3.5	17,639	16,426
1976	16,579,737	4,047,219	3,085	425,125	121,715	45,205	3.6	15,466	15,426
1977	16,882,053	4,172,297	2,700	397,373	119,123	47,450	3.8	14,272	21,875
1978	17,202,491	4,294,491	2,715	410,783	119,797	56,250	4.0	15,818	22,371
1979	17,543,067	4,415,681	2,670	424,034	126,937	61,473	4.1	14,281	18,166
1980	17,866,008	4,533,257	2,515	413,881	140,171	73,834	4.3	13,847	15,988
1981	18,193,955	4,648,047	2,455	414,069	151,692	82,529	4.4	14,377	11,142
1982	18,515,754	4,757,502	2,320	405,263	162,154	90,267	4.5	14,007	13,370
1983	18,790,538	4,857,683	2,170	383,439	175,961	102,260	4.7	14,011	17,295
1984	19,069,194	4,959,369	2,055	371,008	191,871	111,850	4.9	14,765	22,513
1985	19,313,825	5,058,530	1,880	346,208	214,080	124,954	5.1	16,902	32,878
1986	19,509,082	5,146,231	1,680	309,230	234,795	137,471	5.3	19,228	30,733
1987	19,725,010	5,230,176	1,700	314,024	257,521	149,927	5.5	26,993	40,745
1988	19,954,397	5,313,456	1,855	342,031	286,339	163,304	5.7	30,778	38,840
1989	20,156,587	5,390,622	1,680	315,299	313,169	183,199	6.0	33,492	33,167
1990	20,401,305	5,464,196	1,810	335,618	347,406	204,604	6.2	31,391	25,518
1991	20,605,831	5,551,085	1,720	321,932	381,882	220,025	6.5	27,723	41,062
1992	20,802,622	5,643,283	1,730	321,632	417,086	238,576	6.8	30,553	47,151
1993	20,995,416	5,732,819	1,760	325,613	448,956	257,277	7.1	38,059	48,495
1994	21,177,874	5,838,714	1,755	322,938	491,954	279,187	7.4	41,113	41,743
1995	21,357,431	5,953,671	1,775	329,581	521,722	290,663	7.6	51,855	78,420
1996	21,525,433	6,061,425	1,760	325,545	543,280	296,164	7.9	67,089	119,144
1997	21,742,815	6,160,153	1,770	326,002	560,547	307,252	8.1	77,720	66,644
1998	21,928,591	6,247,214	1,465	271,450	588,284	324,971	8.3	47,754	10,776
1999	22,092,387	6,313,071	1,555	283,661	606,860	346,062	8.4	40,833	34,258
2000	22,276,672	6,352,815	1,680	305,312	620,066	367,632	8.6	44,302	38,674
2001	22,405,568	6,359,382	1,400	260,354	635,570	390,665	8.8	40,479	44,086
2002	22,520,776	6,346,621	1,340	247,530	650,001	413,461	9.0	42,311	45,846
2003	22,604,550	6,341,051	1,235	227,070	668,308	437,631	9.2	37,305	49,560
2004	22,689,122	6,332,149	1,180	216,419	698,770	467,129	9.5	50,776	47,185
2005	22,770,383	6,320,814	1,115	205,854	730,054	498,121	9.7	52,520	37,140
2006	22,876,527	6,313,944	1,115	204,459	781,010	543,172	10.0	80,239	42,247
2007	22,958,360	6,307,957	1,100	204,414	821,419	579,659	10.2	82,428	63,150

Source: Ministry of Interior. 2009. Accessed July 07, 2009. <http://www.ris.gov.tw/ch4/static/st20-12.xls>.

Table 2: Change in family structure, 1992–2002.

	% of total households		% of families with persons aged >65 years	
	1992	2002	1992	2002
Single	6.6	8.5	9.6	8.7
Only wife and husband	8.5	12.9	19.6	29.2
Single-parent	6.4	8.1	3.9	4.6
Nuclear	56.6	47.7	14.3	12.9
Three-generation	17.0	16.3	43.1	33.5
Other	5.0	6.5	9.6	11.2

Source: Directorate General of Budget, Accounting and Statistics. 2009. Accessed July 09, 2009. <http://www.dgbas.gov.tw/public/Attachment/412218164171.doc>.

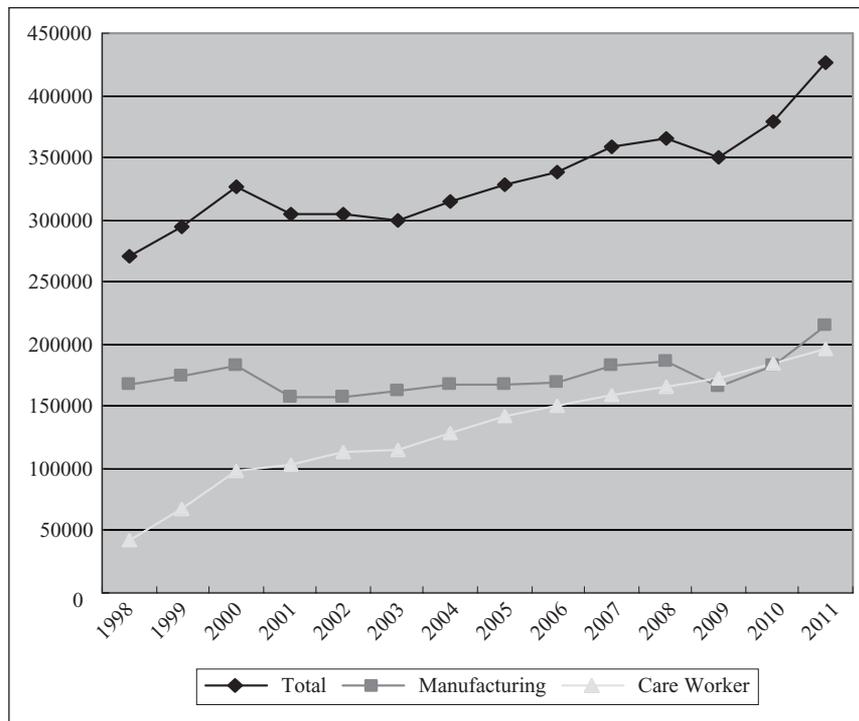


Figure 1: Migrant worker employment trend, 1998–2011.

Source: Accessed January 15, 2012. <http://www.evta.gov.tw/files/57/720084.csv>.

unskilled migrant workers to stay for only 3 years, but this limit was relaxed to 6, 9, and 12 years in 2000, 2007, and 2012, respectively. This means that the

so-called “short-term, temporary” migration has in fact become long-term and permanent. This trend also reflects the structural dependence on migrant workers

to cope with the care crisis and blue-collar labor shortage.

The number of migrant workers in the manufacturing industry remained at 150,000–200,000 previously but increased significantly after 2010 because of the attempt by the Ma Ying-jeou government to reduce production costs via importation of increased numbers of cheap migrant workers. The number of care workers increased steadily at the annual rate of 10.4%, from less than 5,000 to 20,000 in 14 years. There is no sign that this trend will change in the near future if a public long-term care system is not implemented.

Table 3 shows the origins of migrant workers in Taiwan by country. There is a significant clustering phenomenon, in that most Indonesian migrant workers are allocated to the service and social industries, while Thai and Filipino workers are generally in manufacturing. Most migrant care workers are Indonesian, and they are portrayed by recruitment agencies as “stupid and docile” as part of a racialized process intended to compartmentalize migrant workers into different social spaces (Lan 2005). These migrant care workers also

display the gendered care phenomenon: almost all are women.

Since an increasing number of women now participate in the labor market, domestic care work becomes an important issue for both families and the state. We take child-care and eldercare as examples to illustrate how society copes with such care deficits.

3 MIDDLE CLASS USE MARKET SERVICES: PRIVATE CARE SERVICES OR MIGRANT WORKERS

The fertility rate has dropped to an unprecedentedly low value (as low as 0.9‰ in 2010; Taiwan Insurance Institute 2012). Who should take care of children? Currently, children aged >6 years can receive elementary-school education, but there is no public care available for children aged <6 years. Taiwanese feminist groups demand that the government shoulder the task by providing a general public-care system for all families and extending compulsory education to children aged ≥4 years (Wang 2012).

Table 3: Migrant workers in Taiwan by labor sector and nationality (Jan. 2012).

Labor sector	Total	Indonesia (Person)	Philippines (Person)	Vietnam (Person)	Thailand (Person)	Mongolia (Person)	Malaysia (Person)
Total number	426,378	177,904	94,882	82,550	71,038	1	3
Agriculture (including sailors and fishermen)	8,634	7,192	328	1,094	20	0	0
Manufacturing	214,311	20,326	68,910	58,473	66,599	0	3
Construction	3,809	26	360	42	3,381	0	0
Social and individual service (including domestic helpers and caretakers)	199,624 (168,113)	150,360 (110,457)	25,284 (22,969)	22,941 (33,161)	1,038 (Nov 2008)	1	0

Source: Council of Labor Affairs. 2012. Accessed December 31, 2012. <http://www.evta.gov.tw/files/57/722073.csv>.

A survey on female childcare and employment from 2006 revealed that the percentages of full-time mothering for children aged <3 years reduced in the following pattern: 84.71%, 76.96%, 69.65%, and 65.79% in 1979, 1985, 2003, and 2006, respectively (Directorate General of Budget, Accounting and Statistics 2006). Even through such a social change, the percentage of mothers who stay at home to take care of children (65%) is much higher than the percentage of female individuals not in the general labor market (51%). This means that most female individuals still choose to care for children aged <3 years by themselves. Another 35% of families might send their babies to private care centers or rely on relatives like mothers-in-law.

Members of different classes care for their own children at different rates. The more highly educated a woman is, the less likely she is to take care of her child by herself (See Table 4 below). Of female individuals with high-school-level education or less (9 years), senior high school education

(12 years), and tertiary education, 83.42%, 62.42%, and 35.72% took care of their children by themselves, respectively. Thus, the rate of hiring nannies to take care of children increases with level of education. About one out of five tertiary-educated mothers (19.78%) hire nannies, while the corresponding percentage is only 1.62% for mothers with <9 years education. This table also shows that more highly educated women could hire migrant workers to help with childcare, which is only affordable for higher-income families. Without the state's support for preschool childcare, and with the marketization of care industry, money becomes a key factor in the different childcare arrangements of different classes. Higher-income families can hire private nannies or migrant workers to shoulder their childcare burden, while low-income families have to do it by themselves.

Children aged >6 years can attend elementary school from 7:30 a.m. until 4:30 p.m. However, parents normally need to work until after 6:00 p.m. Elementary-school

Table 4: Primary caretaker of the youngest children of married women aged 15–64 years (2006).

Items	Child aged <3 years				Child aged 3–6 years			
	Subtotal (%)	Junior HS or Less (%)	Senior HS (%)	Tertiary (%)	Subtotal (%)	Under Junior HS (%)	Senior HS (%)	Tertiary (%)
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
Self	65.79	83.42	62.42	35.72	36.78	49.07	30.56	18.10
Parents	24.99	14.41	28.35	40.76	10.27	7.24	11.62	15.25
Other relatives	1.06	0.51	1.20	1.92	0.32	0.26	0.32	0.48
Nanny	7.48	1.62	7.28	19.78	1.26	0.40	1.24	3.44
Migrant worker	0.34	–	0.30	1.08	0.19	0.11	0.17	0.42
Workplace care center	0.07	–	0.05	0.27	0.33	0.10	0.20	1.18
Public care center	0.02	–	0.05	0.03	11.79	12.69	11.29	10.48
Private care center	0.22	0.05	0.30	0.43	39.05	30.13	44.60	50.65
Other	0.02	–	0.05	–	–	–	–	–

Source: Ministry of Interior. 2007. "Survey on Women's Marriage, Fertility and Employment, 2006."

children cannot go home alone, since the law prohibits children aged <12 years from staying at home by themselves (Children and Youth Welfare Act, Article 32). Most pupils go to *Anchinban* (安親班, 'the class that makes parents not worry'), a type of childcare center where pupils go to do homework after school and wait for their parents to take them home, normally after 6:00 p.m. Some large Anchinban even have their own buses to take pupils directly from school to the care center. Poor families may send their children to their grandparents or neighbors for short-term rest and bring them home after work.

For eldercare, Table 5 shows the primary and secondary caretakers of older adults aged >65 years who had been hospitalized

Table 5: Primary and secondary caregivers of older adults aged >65 years who had been hospitalized in the last year (2005).

Caregivers	Primary (%)	Secondary (%)
Spouse or cohabitant	21.10	3.79
Son	30.86	24.07
Daughter	15.45	14.20
Daughter-in-law	8.14	12.62
Son-in-law	–	0.52
Brother	0.31	–
Sister	0.24	–
Father	–	–
Mother	–	0.30
Other Relatives	1.96	1.33
Neighbor	–	0.20
Friend	1.19	0.59
Migrant Worker	3.03	2.43
National service worker	8.79	2.26
Volunteer	0.22	0.02
Self	7.86	2.04
Other	0.83	0.87

Source: Ministry of Interior. 2005. "Summary of the Survey on Aged People's Situation." Accessed October 07, 2010. <http://www.fclma.url.tw/fclma/94oldman.doc>. (Laoren zhuangkuang diaocha jiguo zhaiyao fenxi.)

in the last year (2005). The results of the 2005 survey show that the main caregivers are spouses, sons, daughters, and daughters-in-law (21%, 30%, 15%, and 8%, respectively); only 3% and 8% of families hire migrant care workers and domestic care workers, respectively. However, more families hire migrant workers (12.4%) for older adults aged >65 years and handicapped individuals. The gendered care phenomenon is also seen here: if the older adult is a man, the major caregivers are his wife and sons, while older women predominantly receive care from daughters-in-law, female migrant care workers, sons, and daughters (see Table 6).

Another type of place at which older adults receive care is care institutes. As of June 2012, there were 1,065 care institutes, which accommodate 42,600 persons (about 1.7% of all older adults in Taiwan). Very few older adults like to stay in care institutes (only 15% of those surveyed in 2006); however, higher educational attainment is associated with increased willingness to stay in a care center among older adults. Single people are also more likely to stay in care centers than married people. Care centers are polarized in terms of quality: On the one hand, the government has established many veterans' care centers for retired soldiers, many of whom are from mainland China, came to Taiwan after the Chinese civil war of 1949 and remained unmarried throughout their lives; those individuals are placed in these care centers. On the other hand, expensive, private eldercare centers are used by the upper class, who sometimes enjoy small units of about 45 square meters with good medical care and community facilities. One private care center in Tamsui, about 20 kilometers west of Taipei's city center, costs at least US\$1,400 monthly in addition to the bond deposit of US\$170,000.

Table 6: Major caregivers for handicapped older adults aged >65 years (2005).

	Spouse or Cohabitant		Son		Daughter		Daughter-in-law		Son-in-law		Other relative		Neighbor		Friend		Migrant worker		Domestic care giver		In-house service provider		Care givers from private institutes		Other		
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	
Subtotal	13.20	13.39	4.49	8.92	0.37	0.02	0.02	0.47	1.28	0.39	0.02	12.40	5.14	0.89	7.63	29.53	1.85										
Sex																											
Male	20.96	17.11	0.78	2.85	1.05	–	–	–	–	0.13	–	6.45	7.64	0.16	9.81	30.01	3.05										
Female	8.94	11.34	6.52	12.26	–	0.04	0.73	1.98	0.53	0.03	15.68	3.77	1.29	6.42	29.27	1.20											
Age (years)																											
65–69	17.52	7.42	–	4.21	–	–	–	–	–	–	–	14.62	1.20	–	5.75	45.57	3.73										
70–74	21.57	4.90	6.44	11.34	1.87	0.11	–	1.66	–	–	–	7.85	3.82	0.13	3.76	34.68	1.87										
75–79	9.53	21.11	2.92	8.88	–	–	–	1.15	1.72	–	–	9.66	2.43	1.87	9.83	30.91	–										
>80	8.63	16.82	6.60	10.13	–	–	–	1.19	1.81	0.11	0.05	14.96	9.21	1.24	9.42	18.01	1.82										

Source: Ministry of Interior, 2005. "Summary of the Survey on Aged People's Situation." Accessed October 07, 2010. <http://www.fclma.url.tw/fclma/94oldman.doc> (Laoren zhuangkuang diaocha jiegou zhaiyao fenxi.)

Considering that the average wage level earned by a university graduate in Taiwan is only US\$900 a month, such dues are only affordable for the rich. Therefore, it is not surprising that the more highly educated older adults who can afford private care institutes are more willing to stay in them.

4 WHO ARE CARE WORKERS?

We classify the persons who take care work as unpaid versus paid care workers. Unpaid care workers are mostly female family members who do not enter the labor market, including spouses, daughters-in-law, or daughters. Table 7 shows that about 70% of family caregivers for long-term-sick family members are female. Table 8 shows that the care recipients are mainly related to the caregivers as parents, spouses' parents, spouses, and children (29.5%, 12.2%, 20.6%, and 29.2%, respectively).

Though the government subsidizes families with care demands free of charge for a certain number of hours per week that depends on the care recipient's degree of disability, the money does not go to family members, as it does in Korea (see chapter xx of this volume; Lee 2013). The government gives the money to care institutes, which send care workers to families for a few hours at a time to give family caregivers a break from the pressures of long-term care.

There are four types of paid care workers: migrant care workers, immigrant Chinese spouses, Taiwanese female care workers, and nurses/nursing assistants. They are stratified by law, regulations, and ethnicity.

Migrant care workers are highly regulated by law and bonded by debt in their home countries (Wang and Belanger 2011; Lan 2006). They cannot change jobs or employers unless strict conditions are met.

Table 7: Who cares for family members, by gender (2007).

	Frequency	%	Valid (%)
Women	441	69.6	70.4
Men	185	29.2	29.6
Subtotal	626	98.7	100
Missing		8	1.3
Total	634	100	

Source: Taiwan Association of Family Caregivers. 2007. *Survey on Family Caregivers, 2007*. Accessed October 06, 2010. http://www.familycare.org.tw/db/pdfs/upload/journal/2007research_24424512.pdf. (Zhonghuaminguo jiating zhaoguzhe guanhuai zonghui. 2007 Jiating zhaoguzhe xiankuang diaocha baogao.)

Table 8: Relationship with the cared person (unit: %).

Relationship	Cases	%
4a Parents	193	29.50
4b Spouse's parents	80	12.20
4c Siblings	26	4.00
4d Spouse	135	20.60
4e Children	191	29.20
4f Grandparents	12	1.80
4g Spouse's grandparents	1	0.20
4h Friend's children	1	0.20
4i Grandchildren	2	0.30
4k Spouse's siblings	3	0.50
4l Employer's wife	2	0.30
4m Cohabitant	2	0.30
4n Divorced husband	1	0.20
4o Relative's children	2	0.30
4p Other	3	0.50
Total	654	100.00

Source: Taiwan Association of Family Caregivers. 2007. *Survey on Family Caregivers, 2007*. Accessed October 06, 2010. http://www.familycare.org.tw/db/pdfs/upload/journal/2007research_24424512.pdf. (Zhonghuaminguo jiating zhaoguzhe guanhuai zonghui. 2007 Jiating zhaoguzhe xiankuang diaocha baogao.)

They are normally paid a minimum wage set by the government. Migration and work policies that prevent the creation of a competitive market for migrant labor create a type of worker-employer bondage

that limits the workers' mobility within the receiving nation.

Compared with such bonded care workers, the other three types of care workers are relatively free to change jobs and employers. Immigrant Chinese spouses are a specific group of care workers who are designated by the society as immigrants but have the command of the Mandarin language needed for the provision of emotional care. Table 9 shows that most female Chinese immigrants work in service industry. In the initial phase of immigration to Taiwan (the early 1990s), many of them married Taiwanese veterans aged >60 years. When their husbands aged, these immigrant wives were expected to take care of them (Chao 2008). The government encourages such "marriage with care." Before 2010, the Chinese immigrant spouses were not allowed to work until they obtained permanent residency status; in other words, at that time, many of them were classified as "undocumented migrant workers." Even when these Chinese immigrant wives were not allowed to work, however, the government tacitly allowed it if they earned money for their Taiwanese husbands, not for their Chinese families. This arrangement created a historical path of dependency whereby Chinese female spouses were recruited into the social network of the caregiving market. This circumstance also drives the wage split

between Chinese immigrant spouses and Taiwanese caregivers.

The "teachers" in private after-school centers (i.e., Anchiban) serve as de facto caregivers for children aged 6–12 years. However, we presently discuss the caregivers of children aged <6 years, older adults, patients, and the disabled.

An important segment of caregivers is nannies for children aged <6 years. The government has begun to subsidize hiring of nannies by families with children aged <6 years; these subsidies range US\$100–130 monthly. Only those people with nanny certificates can apply for the subsidy. Since family members can also apply for the subsidy if they receive 126 hours of training and pass an exam, the number of certified nannies increased from 32,172 in 2003 to 97,232 in October 2012 (See Table 10).

According the government's description of the occupation of caregiver for older adults, most Taiwanese caregivers work in care institutes but face long working hours and low wages. It is not necessary to pass a state exam to perform care work, although the government has established such exams to improve the skills of caregivers. Therefore, the barriers to entry are low, and anyone who needs a job can apply for one in that field. More than 95% of caregivers are female. Trained caregivers like to work at medical centers, as the work is much less demanding than that performed at care institutes. A caregiver

Table 9: Employment status of immigrant wives.

	Subtotal		Employed						
			Sub	Fixed Job				Pub	Casual
	Persons	%		Sub	Sub	Agricultural	Industry		
Total	175,909	100.	29.4	100.0	8.8	40.8	48.9	1.5	10.9
Foreign	82,358	100.	34.6	100.0	11.5	48.1	38.9	1.4	12.3
Chinese	93,551	100.	24.9	100.0	5.2	31.3	61.8	1.6	9.7

Source: Ministry of Interior. 2004.

Table 10: Number of certified nannies.

Year	Number
2003	32172
2004	37610
2005	40553
2006	43473
2007	47843
2008	55679
2009	67608
2010	82460
2011	91248
Oct 2012	97232

Source: Child Welfare Bureau, Ministry of the Interior. Accessed December 31, 2012. http://www.cbi.gov.tw/CBI_2/internet/main/doc/doc_detail.aspx?uid=110&docid=1536.

in a private care institute generally works 12 hours per day and receives about US\$1,000 per month. Caregivers who perform in-home care work receive about US\$5.00 per hour. Since the workload at medical institutes is easier than at other worksites, it is no surprise that 49.4%, 22.6%, and 23% of caregivers choose to work at medical institutes, care institutes, and as in-home caregivers, respectively (Council of Labor Affairs 2012).

In Taiwan, to hire a migrant care worker, an applicant needs to go to an official long-term care center to register first, and then the center releases an announcement attempting to find a native caregiver for the applicant. If the job matching is not successful, then the applicant can apply for a migrant worker. Table 11 was made by the government to persuade the applicant to hire a native eldercare worker instead of a migrant care worker. Ultimately, less than 0.1% (48 out of 46,747 applicants) accepted long-term care centers' recommendations to hire native care workers, while more than 74% of applicants hire migrant care workers (January–September 2006).

Table 11: Comparison of the benefits of hiring native vs. migrant care workers.

Comparison item	Native helper	Migrant worker
Cultural		
Language	○	×
Cultural background	○	×
Occupational training and supervision		
Professional training	○	×
Professional supervision	○	×
Application procedure		
To-door service	○	×
Approval time	○	×
Cost		
Partially subsidized by government	○	×
Free of accommodation and dining cost	○	×
Service item		
Daily assistance	○	○
Eligible for "take a break" service	○	×
Other		
24-hour service	×	○

Source: Ministry of Interior. 2007. *Ten Years Long-Term Care Plan: Flagship of Warming Society Social Welfare Scheme*, Table 10-3-2. Accessed February 15, 2012. <http://sowf.moi.gov.tw/newpage/tenyearsplan/我國長期照顧十年計畫.doc>. (Woguo changqi zhaogu shinian jihua: dawennuan shehui fuli tao'an zhi qijian jihua.)

Why do Taiwanese people prefer to hire migrant workers over native caregivers, even though only two-thirds of migrant caregivers have received medical-care training (see Table 12)? First, Taiwanese people generally believe that the function of a migrant care worker is to accompany rather than provide medical care; therefore, it seems that what older adults need is not medical care but someone's company. For bedridden older adults, the migrant caregiver needs to perform some specific tasks, such as massage, feeding, and body

Table 12: Medicare training for migrant care workers (June 2011).

Sex	(%)	Nationality	(%)
Men	0.8	Indonesia	77.4
Women	99.2	Philippines	11.6
Age		Thailand	0.6
≤29	37.3	Vietnam	10.4
30–39	48.9		
40–49	13.0		
≥50	0.8	Medical care training	
Education		Yes	66.5
<Junior High	56.3	No	33.5
Senior High	37.3		
Tertiary	6.5		
>Tertiary	0.0		

Source: BEVT Bureau of Employment and Vocational Training (2011) “100nian wailao diaocha tiyao fenxi” (“Summary of Survey on foreign worker, 2011”), p. xx.

cleaning, that are not considered as skilled work since other family members perform them before the hiring of the migrant caregiver. If there is an emergent medical need, the migrant worker can call an emergency center for help. Second, these migrant workers take almost no holidays off (see Table 13). More than half of the workers never take a single day off throughout the entire year, although they do receive overtime pay. To hire a Taiwanese caregiver would cost at least double the wages for the same amount of work.

The last category of care workers consists of nurses and nursing assistants. As of 2010, there were 124,938 nurses and nursing assistants in Taiwan, but most of them worked at hospitals and clinics (see Table 14). Only 13% work in other institutes (mainly care institutes). The work at hospitals is much better than that in care institutes (i.e., better pay, shorter working hours, and fixed schedules); therefore, most nurses and nursing assistants prefer to work

Table 13: Migrant caregivers’ holiday.

	June 2010 (%)	June 2011 (%)
Total	100.0	100.0
Holidays off	5.6	6.2
Some holidays off	52.0	50.8
With overtime pay	99.3	98.2
Without overtime pay	0.7	1.8
Never have holidays off	42.4	43.0
With overtime pay	99.1	98.4
Without overtime pay	0.9	1.6

Source: Bureau of Employment and Vocational Training. 2011. “Summary of Survey on Foreign Worker, 2011.” 34. (100nian wailao diaocha tiyao fenxi.)

Table 14: Distribution of institutes at which nurses work.

Type	Nurses	Percentage
Hospital	87,732	70.2
Clinic	20,043	16.0
Other	17,163	13.8
Subtotal	124,938	100

Source: Lu. 2011. “Forum on the Estimation of Demand for Medical Manpower.” 9. PPT presented at the National Union of Nurses’ Association, 31 Jan 2011. Accessed December 31, 2012. [http://www.nurse.org.tw/userfiles/file/Projects/99年醫事人力需求推估1000130\(fin\).pdf](http://www.nurse.org.tw/userfiles/file/Projects/99年醫事人力需求推估1000130(fin).pdf). (99nian yishi renli xuqiu tuigu luntan.)

at hospitals and clinics. However, since the government requires that every care institute employ at least one nurse or nursing assistant per 15 older adults who receive care (Establishment Standards of Senior Citizens’ Welfare Institutions, Article 11), these care institutes have to hire some nurses or nursing assistants. Article 8 of the same regulation stipulates that a care institute cannot hire foreign migrant caregivers constituting more than half of its total workforce. In practice, these institutes hire almost the maximum quota of migrant caregivers set by the law to minimize cost and leave little room on staff to employ nurses or nursing assistants.

4.1 Concluding Remarks

Since the government—under its ideology of neoliberalism—would prefer not to expand the welfare system to cover people with care needs, people need to find alternate methods to tackle the care-deficit problem. Most of the care workload is placed on family members, especially female ones. However, different classes have different resources to cope with the care-deficit problem. Rich families can afford expensive childcare and eldercare by hiring nannies or migrant workers, while poor families can use only unpaid family members to do the work. Some families might find an immigrant wife to marry and ask her to shoulder all family care problems; this often causes divergent expectations between wife and husband and leads to family discord (Tang and Wang 2011).

Persons in need of care include children, older adults, people with disabilities, and patients. Taiwan has a general care system (National Health Insurance) to cover patients' medical expenditures. However, there is not yet any provision for long-term care insurance, and the government uses residual social welfare to help only the poorest families. Most families need to use unpaid family labor or buy care services from the market. In this social context, the Taiwanese family is structurally dependent on migrant care workers to take care of persons in need of long-term care. A home migrant care worker can not only help older adults and their children but also provide valuable home-cleaning services, thus fulfilling the dual roles of caregiver and domestic helper. Their average hourly wage is only about 40% of that of Taiwanese caregivers, and upper-middle-class families can still afford them.

There is no sign that employment of migrant care workers will decline in the

coming few years. First, the current conservative, pro-capitalist government has no willingness to expand any social-welfare scheme. A long-term care scheme was planned in 2007 under the previous administration of Chen Shui-bian, but it was not adopted. The current government does not want to use its fiscal budget to support the scheme and is considering the use of self-financed insurance to cover its cost (Chen 2011). The policy debate is still unfolding in the mass media, so it will take at least a few years for the law to be enacted. In addition, the government is trying to cancel the minimum-wage standard applied to migrant workers. A recent policy is to set up a “free economic zone” where the capitalists can hire migrant workers comprising more than 40% of the total workforce. Besides, the minimum wage is not applicable to migrant workers (United Daily News 2012). If the minimum wage is reduced, there will be less incentive to hire native caregivers, and the number of employed migrant caregivers will increase. In the end, the Taiwanese long-term-care system is polarized: the haves import cheap migrant caregivers, while the have-nots use unpaid family members or government-provided minimum services to tackle the care deficit.

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Mixed-heritage Japanese–Filipinos/ *Shinnikkeijin* in Charge of Intimate Labor

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INTRODUCTION

Academic interest in the new concept of *intimate labor* has been growing in recent years (Ochiai 2012). Intimate labor is defined as work that involves embodied and affective interactions in service of social reproduction, which includes various occupations like child and elder care, domestic work, and sex work. This kind of labor has commoditized in a free market; this kind of labor is often discussed alongside the migration of women (Boris and Parreñas 2010). One characterization of Asian women who perform intimate labor is that “they are accepted as laborers, but not accepted as people” in the migrant women’s host societies (Ochiai 2012, 21).

In this paper, I apply this category of analysis to understand the migration of mixed-heritage Japanese–Filipinos and their mothers who started to work in Japan recently. Mixed-heritage Japanese–Filipinos (sometimes called “*Shinnikkei* Filipinos/*Shinnikkeijin*”; hereafter called Japanese–Filipinos) have been born to both Japanese and Filipino parents since the 1980s. I argue that many of them who have lived in the Philippines since birth and have migrated to Japan with legal status contributed to the intimate labor market in Japan. They have been working in care labor, the cleaning business, and the

entertainment industry. In this paper, I will analyze the narratives of Japanese–Filipinos and their mothers to clarify the significant problems they face and discuss how they are constructively robbed of their freedom despite the fact that they supposedly have equal civil rights with “Japanese” people.

First, I will review previous research and present the framework of this paper. Next, I will provide a detailed background of the birth of Japanese–Filipinos, explain the debate over their naming, and relate the methods and the profiles of the informants of this study. Then, I will address the institutionalism of migration (Abella 2004) of Japanese–Filipinos, analyze the legal institutions connected to their arrival in Japan, and discuss the mechanisms—including brokers, temporary employment agencies, and NGOs—that intervene in their migration. Further, I will organize the problems facing these migrants into four groups: employment upon arrival in Japan, education, expectations of intimacy, and instability of identity; then, the conflict and stress caused by migration will be considered according to the concept of intimate labor. Finally, I will organize the problems elucidated through the description of Japanese–Filipinos according to the concept of intimate labor. Furthermore, I will indicate the issues this paper was not able to cover and prospects for future research.

1 REVIEW OF PREVIOUS RESEARCH

Many researchers have interpreted reproductive labor and the people involved in it from the standpoint of the intersection of gender, class, and race/ethnicity. Reproductive labor signifies “the labor needed to sustain the productive labor force” (Parreñas 2001, 61), which preserves social connections (Glenn 1992) and includes household labor, care for older adults, and child rearing. This concept was debated by Marxist feminists in the 1970s–80s. Feminists criticized that the gendering of reproductive labor symbolized the suppression of women, and while these forms of labor are indispensable in an industrial economy, in most cases, reproductive labor performed outside the market is not recognized as “real work.” Furthermore, those occupied with reproductive labor cannot consequently escape the structure of inequality caused by gender division (Glenn 2001, 80–81).

Meanwhile, Glenn took issue with the feminist analysis in that it only viewed reproductive labor from the angle of gender and discussed the issue as if women around the world were equal to one another; Glenn noted that the race/ethnicity and class differences of women also deserve attention (Glenn 2001, 81). Glenn analyzed the field of reproductive labor in the United States by dividing it into three eras and demonstrated that wealthy, white women would historically employ low-income women of color because reproductive labor was founded on racial divisions (Glenn 1992; 2001). In addition, Parreñas developed Glenn’s theory and Sassen’s (1984) argument of the international division of labor, using Filipino household laborers working in Rome and Los Angeles as examples

to illustrate the “international division of reproductive labor” that exists within the rapidly globalizing market economy (Parreñas 2001, 78). She stresses that “gender is a controlling factor of the outflow of migrant labor in globalization” while acknowledging that “racial, class, and citizenship inequalities aggravate [migrants’] positions in receiving nations” (Parreñas 2001, 61–69).

Further, a new concept of intimate care has been formulated in recent years. While intimate labor overlaps with reproductive labor, they are not the same: intimate labor can be interpreted more broadly (Ochiai 2012, 3–10). As stated previously, intimate labor includes the following: “attending to an individual’s intimate needs/demands inside or outside the home” and “work that involves embodied and affective interactions.” On the other hand, Glenn (1992, 1) wrote that reproductive labor includes “activities such as purchasing household goods, preparing and serving food, laundering and repairing clothing, maintaining furnishings and appliances, socializing children, providing care and emotional support for adults, and maintaining kin and community ties.” It refers only to that which directly connects social reproduction with the reproduction of people or labor force; the concept excludes labor performed by workers in arenas such as the sex industry (Boris and Parreñas 2010, 7). In other words, reproductive labor is that which is subservient to blood relationships, while intimate labor is proposed to dissolve things related to blood ties. Moreover, intimate labor is closely connected to the international migration of Asian women (Ochiai 2012, 19–25). Asian women who have migrated internationally tend to be expected to be responsible for excessive amounts of intimate labor

(Ochiai 2012, 24). As entertainers, household laborers/child rearers, and care workers, Filipino women in Japan serve as a prime example of “Asian women who cannot escape intimate labor despite their change of position” (Ochiai 2012, 25).

In this paper, I will set aside the argument regarding the distinction between these two concepts and instead exclusively examine the concept of intimate labor in order to maintain distance from the topic of blood relations. The informants in this study work as care laborers in nursing homes, cleaners in business hotels and hot-spring facilities, and entertainers in pubs and bars mainly catering to male clients. Consideration of intimate labor—which includes household labor, care labor, international marriage, sex labor, and entertainment as a single category—will be instrumental in understanding gender, race/ethnicity, class, and other power relationships in a transforming global economy (Boris and Parreñas 2010, 2).

There have been four types of research on migrant workers in the past 3 decades. Especially, Asian women who migrated internationally to perform labor became the subject of research starting in the 1990s, when the feminization of migration accelerated (Oishi 2005, Lan 2006, Duffy 2011).

The first category consists of research regarding migration policies. For example, Ohno (2010) and Asato (2006) described the immigration policies of developed nations and Asian newly industrializing economies (NIEs), which have faced the problem of

care-staff shortages in a greying society. These papers analyze the host country’s welfare policies, systems for accepting foreigners, and sending policies so that they can be addressed in new policy proposals (Asato 2006, Ohno 2010). In Japan, the enactment of the Japan-Indonesia Economic Partnership Agreement and the Japan-Philippines Economic Partnership Agreement (which came into effect in July and December 2008, respectively) caused interest in political research regarding foreign care laborers to heighten (Asato 2007, Tsukada 2010)¹. As care-staff shortages are a serious issue in greying societies, how host countries will accept them has become a matter of debate.

Second, some studies have depicted Asian women laborers from the micro-level viewpoint of their work environments rather than a macro-level policy viewpoint. Through investigation of the livelihoods of female laborers in their host countries, such studies have identified problems unique to female laborers, including low wages, long hours, and violence at the hands of employers (Asian and Pacific Development Centre 1989, Asian Migrant Workers Centre 1991, Huang, Yeoh, and Rahman 1994). In addition, Romero (2002) discussed the power relationships between laborers and employers. Ballescás (1992) and DAWN (2005) conducted surveys of Filipino women working in Japan as entertainers and discovered the mental and sexual anguish and exploitation that these Asian women face in their host country’s society. Further, De Dios

¹As of 2012, there are 500 Indonesian and 396 Filipino care-worker trainees in the country. “Trainees” refer to foreigners who came to Japan for employment/training with the goal of obtaining the national license for nursing and/or care workers. Nursing trainees work and train for 3 years—and care worker trainees for 4 years—and must learn all the knowledge and skills necessary to obtain the license. After the license is obtained, it is possible for them to reside and work as nurses and care workers with no limits on their term of residence.

criticized the violence forced upon Filipino women working as entertainers and sex workers, who are known as *Japayukisan* (De Dios 1989; 1992).

Third, research since the late 1990s has focused on the independence of immigrants to become popular rather than their vulnerability. For instance, Constable (1997) focused on the active nature of household laborers, using Filipino household laborers in Hong Kong as an example to portray “everyday resistance” (including improvements to their own work environments and their power relationships with their employers). Suzuki (1998, 2002) portrayed the conflict and resistance found among Filipino wives residing in the Tokyo metropolitan area, claiming that these immigrants’ day-to-day practices challenge the concept of dichotomy between “Japanese” and “foreign” and gender discrimination. Takahata (2003) introduced the case of Filipino women who face problems in rearing their children and described how they have coped with such problems through reciprocal help activities among migrant women. As seen here, researchers discuss Asian women not only as exploited laborers but also as agents² (Nagata 2005).

Finally, researchers have considered intimate laborers not only as laborers but also as family members (e.g., parents). For example, Parreñas (2005) and Yeoh and Lam (2006) focused on transnational families and parenting from abroad. Parreñas (2005) demonstrated the “chain of care,” whereby women from developed nations

hire those from third-world countries as household laborers or maids; in turn, the latter hire women from lower-class countries than theirs as household laborers. She also focused on the separated families of household laborers and reviewed the negative impact of migration. In her discussion on household laborers, she discussed Filipino laborers who are physically away from their families. Despite the distance, they feel pressured to provide transnational parenting/mothering for their children in the Philippines, which consist of 1) moral care, 2) emotional care, and 3) material care. Moreover, such mothers are portrayed as compensating for moral and emotional care with material care in the form of money transfers or gifts. However, she indicates that this only deepens the mother’s and children’s mental anguish, citing the anguish of children living separate from one or both parents and noting that family problems escalate to the point that family reunification is delayed (Parreñas 2005).

Furthermore, Yeoh and Lam (2006) conducted a quantitative survey of children left behind by and who migrated with their parents; after analyzing the effects of child rearing and education strategies on the children, they concluded that the lengthening of women’s immigrant work might have a negative effect on their children. These studies show that a person’s migration not only transforms the immigrant individually but also has a major effect on the immigrant’s family, and there is a possibility that it could change the

²As Filipinos in Japan with Japanese spouse visas or permanent residency status have no deadline for acquiring their license, and they have an advantage in language compared with newcomers to Japan, they have begun working in care facilities from about the late 2000s (Suzuki 2009). Intervention by temporary employment agencies facilitates employment, and attendance of a Home Helpers level 2 training course sponsored by them is mandatory for placement (Takahata 2009).

immigrant's concept of her family in her nation of origin. This paper will not only focus on the immigrant Japanese–Filipinos themselves but will also pay attention to their family units and consider the mothers of Japanese–Filipinos—particularly their mother-child relationships and ties with their families in the Philippines.

While the degree of acceptance of foreign household laborers in Japan is low, it is undeniable that Asian women who came to Japan as entertainers in the 1980s or who came to Japan in order to marry a Japanese national have supported the social reproduction of Japan (Ito 1996). Japan has traditionally had very few foreign household laborers due to the Japanese government's policy on isolation regarding foreign "manual labor" (Ito 1996, 254–254) and because outsourcing household labor is considered taboo as a result of sex-role divisions (Cornelius 1994, 385). Migration through marriage has also significantly affected the intimate-labor industry, including household work, child care, and in-home eldercare (Ito 1996, Ochiai 2012). Furthermore, Japan has begun to accept foreign nurses and welfare caretakers, as Japan faces a labor shortage in the field of medical welfare. The approval of Economic Partnership Agreements (EPA) with Southeast Asian countries have promoted the liberalization of "human migration"; though there are several issues, such as language, the employment of foreign human resources is becoming a high-potential strategy for personnel recruitment in the care and welfare industry (Suzuki 2007).

Additionally, in recent years, foreign residents in Japan—including Filipinos residing in Japan after international marriages—

have taken Home Helpers Level 2 courses sponsored by temporary employment agencies and accepted work in care facilities and similar facilities (Research Association of Filipinos Caregivers in Japan 2010). Some women have taken the more positive approach of attending these training courses in order to cast aside the stereotype that they are sex laborers or entertainers (Suzuki 2009). This has been analyzed as their process of upward social mobility and effort to thrive in Japanese society, whether successful or not. However, Ochiai argues that Filipino women in Japan fall into a cycle of intimate labor—from an entertainer to wife to caregiver (Ochiai 2012, 25). There should be more discussion regarding the matters of foreign intimate labor in Japan.

2 BACKGROUND OF INFORMANTS AND METHODS

2.1 Who Are the Japanese–Filipinos/*Shinnikkeijin*?

In this section, we explain the social and historical background of Japanese–Filipinos born since the 1980s and discuss the transformation of their naming. This paper adopts the term Japanese–Filipinos to refer more neutrally to children with both Japanese and Filipino parents. However, they have been called by a variety of names amidst their social backgrounds since the 1980s³.

The birth of mixed-heritage Japanese–Filipinos has been a consequence of the increase in international marriages of Japanese–Filipino couples that resulted from the expansion of meeting opportunities that came with the migration of Filipino women and Japanese men in the late

³Analysis regarding naming has been based on the archives of Asahi newspaper and Manila Shinbun.

1970s. The number of Japanese–Filipino marriages was increasing from the late 1990s⁴ and only began to decrease in 2006. Even now, Filipino wives rank second among the nationalities of foreign wives of Japanese men, following Chinese wives (Ministry of Health, Labour and Welfare 2010a). Among Filipino intermarriages, marriages to Japanese people are second most common only to marriages to Americans (Commission on Filipinos Overseas 2008). The population of children with Japanese and Filipino parents has increased in proportion to the number of Japanese–Filipino marriages (1992–2012 total: almost 100,000). Among these, 98% are born to Japanese fathers and Filipino mothers (Ministry of Health, Labour and Welfare 2012). However, these numbers do not include people who are not registered in the Japanese Family Register or were born before 1991. While it is difficult to determine the exact numbers of such people, as some parents do not file birth certificates for children residing in the Philippines with the Japanese government (regardless of wedlock status), NGOs and other sources estimate that their total number is 100,000–200,000 (Nuqui 2008).

Several facets have contributed to the increase in Japanese–Filipino marriages. One was the influx of Filipino “rural brides” who came to Japan through private mediators and family introductions beginning in the 1980s. They were contributed

for the regional revitalization of rural regions, such as Tohoku and Shikoku, where the shortage of brides was escalating (Faier 2009, 19).

Another was the foray of many Japanese businesses into Asian countries following Japan’s rapid economic growth in the 70s, when many Japanese men visited the Philippines for business purposes. There was also an increase in travel by Japanese people to Asian cities, such as Manila and Bangkok, for sightseeing purposes. As many of them would stay out late at the local pubs and nightclubs and solicit prostitutes, this phenomenon was called “sex tourism.” Some among them conceived children and returned to Japan without taking responsibility.

After protests from women’s groups in Japan and the Philippines (De Dios 1989, 140), sex tourism died down. However, Filipino women began to obtain travel visas from brokers instead, and they would work in Japanese pubs and clubs. In 1981, a new visa called the “entertainment visa” was introduced, and about 500,000 Filipinos have come to Japan on entertainment visas in the approximately 30 years since^{5,6} (Takeda 2008). Originally, the visa only applied to dancing and singing, and all other services were considered beyond the purview of the visa, but in reality, a great number of women would serve customers or act as escorts informally (Ballescás 1992). This caused relationships

⁴Before 1991, they were listed in the Population Survey Report under “Other Countries,” but it can be assumed that there were Japanese–Filipino international marriages in the 1980s.

⁵The ministerial order regarding entertainment visas was amended in 2006, and since then, the annual number of entertainment visas issued decreased sharply—to 10% of the annual numbers issued in previous years.

⁶Over 95% of the people who obtained entertainment visas were women (Nuqui 2008).

between “customer” and “talent” to develop in the workplace and gave rise to many Japanese–Filipino couples and international marriages.

Some among them divorced and returned to the Philippines or conceived out of wedlock and gave birth to and raised their children in the Philippines. These mothers and children experienced extreme distress when child support or communication from their Japanese husbands/partners were withheld. In the 1980s, the Batis Center for Women—a Filipino NGO that provides care for children and their mothers who have been deserted by Japanese men—criticized the expression “economic babies” used by the media used to describe these children as being “too cruel” and gave them the name *Japinos*. However, when Batis subsequently conducted a survey of these mothers regarding this name, the results showed that “Japino” sounded discriminatory (Javier 2010). Its similar sound to *Japayukisan*, the derogatory term that originated in the early 1980s for Asian women who went to Japan to get married, may be one of the reasons it sounds discriminatory.

In the late 1990s, NGOs decided that the term “Japinos” was not appropriate and proposed to change their name to “JFC,” an abbreviation of “Japanese–Filipino Children” (Javier 2010, JFC Support Network 2005). Since then, the name “JFC” has spread among supporters, but the term “Japino” is still used in Filipino media and everyday conversation. The terms “Japino” and “JFC” have appeared in Japanese newspapers, but in many cases, these terms have been translated and printed as “Japanese–Filipino mixed-blood children” in the 1980s–90s and “Japanese–Filipino international children” since the late 90s.

Even later, in the 2000s, the Japanese-language Filipino newspaper *Manila Shinbun* began to call children born to Japanese–Filipino couples as “*Shin-Nikkei Nisei* (New Second-Generation Japanese)” or “*Shin-Nisei* (New Second-Generation)” for short. As the children of overseas Japanese nationals living in the Philippines before World War II are called second-generation or third-generation Japanese people, the “new” is included to distinguish those two groups from each other. Moreover, the NPO called the Shin-Nikkeijin Network, founded in Cebu in 2006, calls those born since the 1980s “Shin-Nikkeijin,” distinguishing them from the descendants of Japanese people born before or during the war by calling the latter *Kyu-Nikkeijin*. Further, brokers or temporary employment agencies use the term “Shin-Nikkeijin” to emphasize their “Japaneseness” and assert that they are not “foreigners” in order for them to be more easily accepted in Japanese society as laborers.

Media and related organizations have been calling Japanese–Filipinos by various names, but in this particular paper, I will use the term “mixed-heritage Japanese–Filipinos” as a neutral term.

2.2 Survey Methods and Profiles of Informants

This paper will use the data gained from a fieldwork survey conducted by the author in many regions, such as Manila, Davao, Tokyo, and Nagoya, from October 2008 to November 2012. Interviews with Japanese–Filipinos and their mothers were the focus, and supplementary interviews were conducted with people at their workplaces and other family members. Their life histories, narratives, and participant observations by the author will be the subjects of analysis.

Table 1: Profiles of Survey Informants (Individuals).

Name ⁷	Gender	Nationality ⁸	Age (at time of interview)	Year of Arrival in Japan	Place of Origin	Current Location (at time of interview)	Education ⁹	Occupation/ Work History
Aki	Female	Dual Nationality	20	2010	Metro Manila (MM)	Osaka Prefecture	High School (HS) Graduate	Care Facility (Cleaning)/ Hotel Cleaning
Kumi	Female	Dual Nationality	21	2009	MM	Chiba Prefecture	HS Graduate	Care Facility (obtained Home Helper level 2) → Boxed Lunch Factory
Chie	Female	Japanese Nationality	23	2005	Leyte	Chiba Prefecture	Vocational School (J)	Care Facility (obtained Home Helper level 2)
Rika	Female	Dual Nationality	19	2012	MM	Aichi Prefecture	Vocational School (P)	Hotel Cleaner/ Entertainer
Eiji	Male	Dual Nationality	23	2008	MM	Tokyo Metropolis	HS Graduate	Electrician → Care Facility (Kitchen/Tray Service) → Manufacturing
Kazu	Male	Japanese Nationality	23	2010	MM	Saitama Prefecture	HS Graduate → Nighttime High School Graduate (J)	Care Facility (Cleaning) → Restaurant

To record the interviews, I primarily used an IC recorder, with transcription conducted after the interview, but in cases in which the recorder could not be used for whatever reason, the interview content was written as field notes. Thus, the transcribed

manuscripts and field notes were used as materials to reconstruct the informants' life histories. I interviewed each participant not once but a number of times, both formally and informally, and rapport was formed through daily communication by

⁷All names are aliases.

⁸While Filipino law has approved of dual citizenship since 2003, Japan's citizenship laws require that people to choose a single country of citizenship by age 22 years.

⁹Until 2012, elementary and high school generally lasted 6 and 4 years, respectively, in the Philippines. Graduation from secondary school happened 2 years earlier than in Japan. The new school system, called K+12—which requires 12 years before students enrol college or university—has started since 2012.

Table 2: Profiles of Informants (Mother and Child).

Name	Family Structure/ Age/Nationality of Child (at time of survey)	Year of Arrival in Japan	Place of Origin	Current Location (at time of survey)	Education	Occupation/ Work History
Family Gonzales	Myla, Mother (age 42) Marc, Son (age 16, Japanese nationality) Mika, Daughter (age 13, Filipino nationality)	2011	Davao	Aichi Prefecture	Mother: University Dropout (P) Eldest Son: Middle School Graduate (J) Eldest Daughter: Middle School Year 1	Mother: Entertainer ¹⁰ (J: 1990–1993) → Sales (P) → Unemployed → Care Facility (J) Eldest Son: Electrical Equipment Repair
Family Harada	Roselyn, Mother (age 42) Rika ¹¹ , Eldest Daughter (age 19, dual nationality)	2012	MM	Aichi Prefecture	Mother: HS Graduate Eldest Daughter: Vocational School (P)	Mother: Entertainer (J: 1991–1998) → Private Shop (P) → Hotel Cleaning (J) Eldest Daughter: Hotel Cleaning
Family Ito	Amelia, Mother (age 48) Alisa, Eldest Daugh- ter (age 7, Filipino nationality)	2010	MM	Aichi Prefecture	Mother: HS graduate Eldest Daughter: Elementary School Year 1	Mother: Entertainer (J: 2000–2004) → Unemployed (P) → Entertainer (J)

telephone or SMS. The interviews were primarily conducted in English and Filipino or mix of them, with some conducted in Japanese.

For this survey, I conducted interviews with six young individuals and three mother-child groups. The survey participants' profiles are shown below. As the arrival of Japanese–Filipinos in Japan follows two patterns—1) arriving individually with Japanese nationality or resident status

and 2) arriving in Japan as a minor with Japanese nationality or resident status with a Filipino mother who has obtained resident status—both patterns are indicated.

3 MOTIVES AND INSTITUTIONALISM OF MIGRATION

This section will analyze the survey participants' motives for migration, legal status

¹⁰As the term for an entertainment visa is 6 months, these women arrived in Japan several times, renewing their visas each time.

¹¹Same individual as Rika of table 1. She came to Japan individually in March 2012, and her mother followed her to Japan in October 2012. I interviewed Rika once in September 2012 when she was living alone and two times more after her mother joined her.

concerning institutionalism, and immigration processes from their responses during the interviews. This will clarify why they chose to migrate from their life histories, including their backgrounds and lives in the Philippines, and the routes they took to act upon their choice. As the beginning of the section, the case of Aki is narrated as a representative example.

3.1 Example 1. Coming to Japan for a Family with Debt

Aki was born in Japan in 1989, but as a result of her parents' divorce, she lived in the Philippines at ages 1–20 years, after which she came to Japan. She has not seen her Japanese father since her parents' divorce and does not even know where her father lives. Her Filipino mother remarried to a Filipino man and later had two more children. Her two sisters have Filipino nationality.

Her turning point came with her graduation from high school. Her stepfather had gone to work in Kuwait as an overseas laborer when she was in late elementary school, but he had not returned to the Philippines in many years, and he stopped sending money. In addition, her stepfather had left debts behind in the Philippines, and Aki's mother and grandmother had to repay them. In addition, since Aki's youngest sister was in poor health and had to see a doctor frequently, her family needed money for medical expenses. With her family in financial hardship, Aki's mother and stepfather's mother recommended that she go to Japan to work. Aki possessed Japanese nationality, as she was born while her parents were married.

Looking back on this time, Aki commented as follows:

Ever since I was young, my relatives and neighbors would call me “half-

Japanese” or *anak na hapon* (‘Japanese child’). So I had the feeling that my father was Japanese and that I had a different father from my sisters. I always felt like my home in the Philippines was not my true home. I had my mother and grandmother pushing me, and I had always thought I would go to Japan, so I did not resist. I wanted to live alone in Japan, but I did not know anything about Japan. All I knew was that my Japanese father was there.

She did not possess a Japanese passport at the time and was ignorant of the overseas travel process. Therefore, Aki went to subscribe to Organization X, of which she had heard through an acquaintance of her mother's. Organization X was an organization managed by a Japanese man that intermediates employment for Japanese–Filipinos. After submitting her birth certificate, her parents' marriage license, and a copy of her father's Family Register to Organization X, she received a phone call from Organization X a few months later. She was issued a Japanese passport, and they had found employment for her in Japan, after which she was prepared for travel. When she went to the office, they had a contract ready, and she was told that she could go to Japan if she signed it.

In September 2010, Aki arrived in Japan with 10 fellow members of Organization X and went to work as a cleaner in a care facility in Osaka. She had an apartment prepared for her by a Japanese temporary employment agency through Organization X, but by that point, Aki was nearly 500,000 yen in debt from travel expenses and referral fees, and 20,000 yen was withheld from her for repayment each month. A further 20,000 yen was withdrawn as “contributions” to

Organization X. At 750 yen per hour, Aki's monthly salary was about 120,000 yen per month, and 1/3 of it went to these two payments; after paying 48,000 yen in rent, she barely had enough for her own living expenses, let alone to send money to her family in the Philippines. For that reason, Aki kept working in the care facility on weekdays and took a part-time job as a sleep-in hotel cleaner on Saturday evenings.

Aki said, "Ever since I arrived in Japan, I thought I had been tricked. I thought several times that I should never have come. However, I have always been on bad terms with my mother, and even though there are hardships in Japan, I never feel like going back to the Philippines." Though Aki—who has few friends in Japan and is constantly working—has feelings of homesickness for the Philippines, where she was raised, she is aware that the Philippines is not her home either.

3.2 Motive for Migration

The motives of human migration are often explained by economic factors. Among informants of this study, some came to work in Japan to escape a life of poverty in the Philippines. However, the actual motives for migration are more complex; they include family reintegration, self-actualization, and nostalgia, and these motives change with the times (Kajita, Tanno, and Higuchi 2005, Tsuda 2009, Hara 2010).

Aki's goal was not simply her own personal upward economic mobility but her need to support her family. Ochiai (2012) stated, "Female gender roles that are the norm in their country of origin have a large effect on the identity and life course of women who migrate internationally" (p. 22). Aki was under pressure from her mother and grandmother; that is to say, she experienced the excessive role expectations that women impose on women. Aki also had the

inward motive of self-actualization and the social motive of longing to "live alone in Japan." She may have also been motivated to escape from her chaotic life in the Philippines (Tacoli 1996). In other words, Aki wanted to live alone in Japan to free herself from the sense of alienation due to being the only "Japanese" person in her family.

In addition, Kumi stated that "I felt timid living with my aunt's family. I just wanted to leave the house." The participants' sense of belonging in the Philippines varied greatly: Chie said, "My mama told me that Japan is a great and beautiful place. I wanted to see my father's country once with my own eyes." The "sense of nostalgia" (Kajita, Tanno, and Higuchi 2005) held by people of Japanese descent is another motive. Many Japanese–Filipinos know that their fathers are Japanese, even if they do not live together. As seen from Aki's story, their families and neighbors—including their mothers—comfortably talk about the fact that their fathers are Japanese. However, many of them have lost contact with their fathers and had never been to Japan. Thus, some craved connections with Japan from a young age and wanted to go to Japan to discover their roots. Some also raised the reason of family reintegration: Kumi and Kazu said they wanted to go to Japan because they dreamed of reuniting with their fathers, whom they had never met.

Furthermore, among families that came to Japan, some mothers have the goal of providing their children with education. The mother of Gonzales, Myla said, "I wanted my two children to receive a Japanese education; Japan is far more advanced in the sciences." According to Ueno (2011), investment in their children's education is an exemplary reason for becoming a household laborer in abroad, leaving their

children in their home. Same as this case, the mothers of Japanese–Filipinos are strongly motivated to provide for their children’s education. In addition, Kazu mentioned the desire to study engineering at a Japanese university as one of his reasons for coming to Japan.

These social motives exist apart from economic reasons. In other words, achievement of economic independence is necessary for satisfaction of social motives.

3.3 Legal Status and (Re-) Acquisition of Nationality

Japanese–Filipinos have either Japanese nationality, Filipino nationality, dual nationality, or no nationality. Both Japan and the Philippines have nationality laws based on blood lineage; thus, in principle, children of Japanese–Filipino couples are born with dual nationality. However, many of those born in Japan only maintain their Japanese nationality, because it is simple to enter the Philippines with Japanese nationality. Further, if the child’s parents are unmarried or even divorced, those who are registered as the child of a Japanese parent in a Japanese Family Register possess Japanese nationality. On the other hand, there are cases in which birth registration is not sent to Japan or not entered into the Japanese parent’s Family Register. Therefore, if they submit their birth certificates to the Philippines, they possess Filipino national-

ity, and if not, they have no nationality¹². Many Japanese–Filipinos residing in the Philippines have lost their Japanese nationality because their parents’ marital status is not recognized or they have not sent notification despite being a legitimate child.

Japanese–Filipinos who do not have Japanese nationality seek consultation regarding nationality, and lawyers’ associations and NGOs have given legal support for their nationality recovery since the 1990s (Suzuki 2010). A Nationality Affirmation Case that began in 2006 resulted in a Supreme Court ruling in favor of the plaintiff on June 4, 2008, and ten children with Filipino nationality who were recognized by their Japanese fathers after birth were approved for Japanese nationality (Ito 2009). After that, the nationality laws were amended in December 2008 and became effective on January 1, 2009. Since then, 3,849 people have submitted notices of acquisition of nationality, of whom 3,505 have been issued certificates of acquisition of nationality (Ministry of Justice 2012)¹³.

Obtaining Japanese nationality makes entry into Japan possible, but even without Japanese nationality, residency status of “spouse or child of Japanese national¹⁴” could be issued if recognition from one’s father is received. However, according to Filipino law, minors aged 18 years with Filipino nationality cannot leave the country without being accompanied by a

¹²In the case of Filipino mothers illegally residing in Japan, they cannot notify either country of their child’s birth; thus, these children have no citizenship.

¹³However, the number of Filipino citizens who have obtained Japanese citizenship is unknown, as the applicants’ nationalities are not listed.

¹⁴The residency status of “spouse or child of Japanese national” applies to 1) spouses of Japanese nationals, 2) children born to Japanese nationals, and 3) specially adopted children of Japanese nationals.

guardian. The Japanese Immigration Control Act also states that children under age 15 years cannot enter the country independently. However, Filipino mothers may enter Japan together with their children. If mothers with Filipino nationality are married to Japanese men, they may obtain “spouse or child of Japanese national” resident status, and in cases in which a mother is the legal guardian of an underage child

with Japanese nationality, she may obtain “long-term resident” status.

3.4 Immigration Processes

However, even with such motives and legal status, there are considerable difficulties in the actual act of immigration. This is because many people have no one on whom to rely in Japan and lack the necessary knowledge or network required for

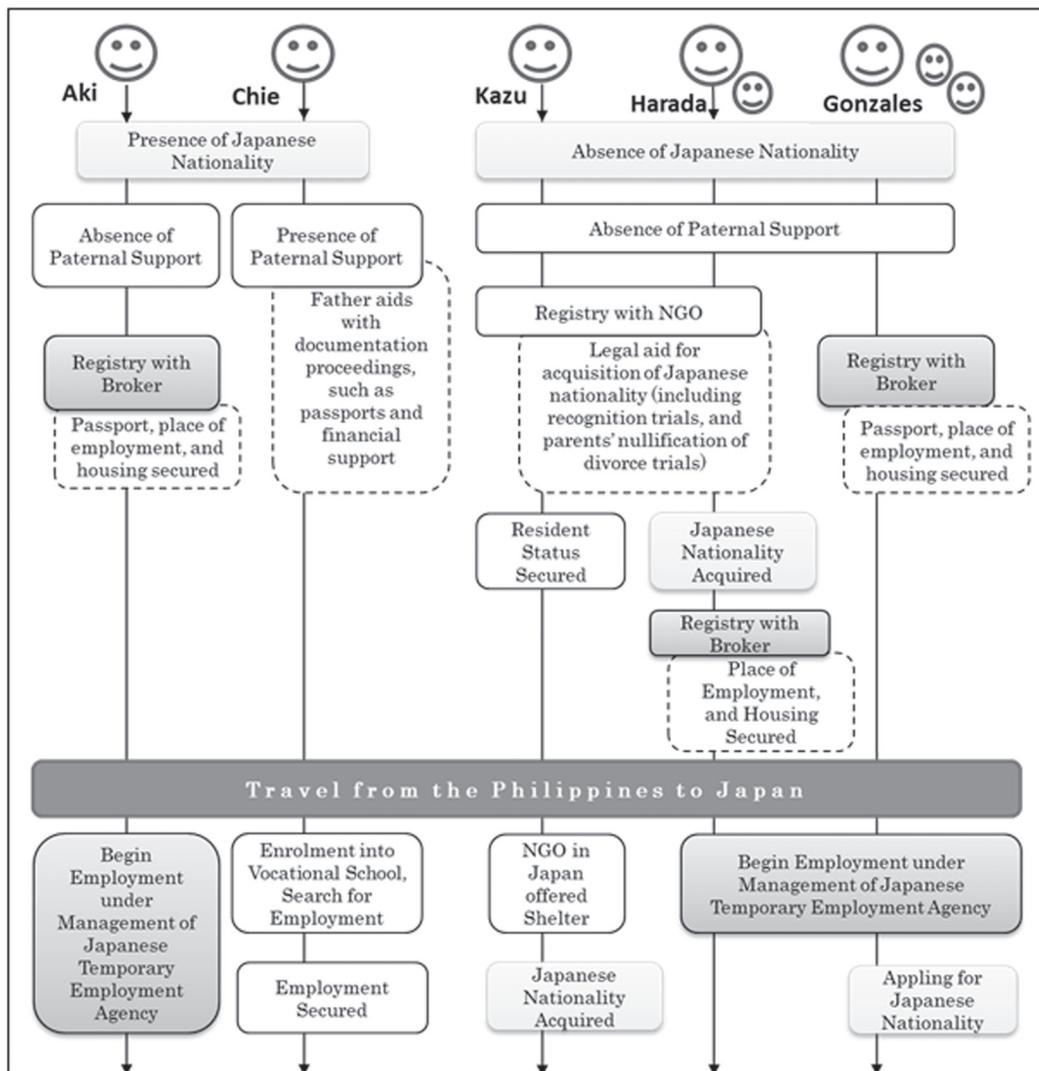


Figure 1: Immigration processes of informants.

residence or employment in Japan. In addition, airplane tickets, rent deposits, and fees for documents (e.g., father's Japanese Family Register) are an economic burden. In reality, many cannot migrate without a supporting association or organization. The chart below shows the flow of the migration sequences of Aki, Chie, and the Kazu, Harada, and Gonzales Families^{15,16}.

First, administrative proceedings must be taken. Chie's parents were unmarried, but because she remained in daily communication with her Japanese father, she was able to request her father's cooperation in acquiring a Japanese passport. It is not easy to come to Japan if there is no communication with the father (e.g., if the father has gone missing or has passed away). It is especially difficult to make travel preparations by oneself, especially when one does not have Japanese nationality and therefore needs a personal reference in Japan. Japanese-Filipinos with these issues register with brokers who will "support" the sequence from travel to employment and facilitate the path to immigration.

Aki and the Harada and Gonzales families applied for nationality and residence status with the assistance of brokers. As Aki was born within wedlock and entered into her father's Family Register at birth, she was able to retain her Japanese nationality, but since she was not able to handle all the proceedings by herself, she registered with a broker. The broker requested that a public notary in Japan obtain a copy of her father's

Family Register; this enabled her to immigrate to Japan as a Japanese citizen. Meanwhile, neither the Gonzales family's eldest son Marc nor their daughter Mika possessed Japanese nationality, though the eldest son was born in wedlock, while the eldest daughter was born out of wedlock after her parents' divorce. However, the eldest son's name was not recorded in his father's Family Register, so he had lost his Japanese nationality. For that reason, they were instead approved for "spouse or child of Japanese national" resident status with the goal of reacquiring Japanese nationality. These proceedings were conducted through a broker.

On the other hand, Kazu and the Haradas commissioned an NGO for the administrative and legal proceedings. As Kazu's Filipino mother had passed away, he did not know his father's location, but with a copy of his father's passport as evidence, the NGO succeeded in finding her father and found that his parents' marriage had been established. However, as Kazu had lost his Japanese nationality due to lack of notification of his birth, he had to travel to Japan and reside there for several months before reacquisition of nationality. Afterwards, the NGO persuaded his Japanese father to pay the airfare and assisted Kazu in finding a place of residence; then, he was able to apply for reacquisition of nationality with the help of a volunteer attorney.

The nationality-acquisition process of the Haradas' children was also aided by an NGO. As their parents were divorced and

¹⁵As the cases of Kumi and Eiji and those of Kazu and Itos are nearly identical, they have been redacted.

¹⁶This chart does not consider the temporal axis. The duration of the proceedings differs according to readiness of all government documents and the presence vs. absence of paternal support. For instance, Aki's passport was issued through a relatively simple process within months, but the Haradas waited eight years before obtaining passports after they became NGO clients.

their father did not provide recognition, it was necessary to initiate proceedings against their father and conduct a recognition trial. This trial was conducted at next to no charge with the support of a volunteer Japanese lawyer in cooperation with the NGO. Since nationality acquisition due to post-birth recognition was approved after a 2009 legal amendment, applications for acquisition of Japanese nationality has been conducted at the Japanese Embassy in the Philippines. However, since this NGO did not provide employment support in Japan, all further immigration/employment support was given by a broker.

Contracts with Filipino brokers who prepare residences, places of employment, references, and access to Japanese temporary employment agencies can be the only choice for Japanese–Filipinos with no relatives in Japan. However, unlike the cases of Chie (who travelled independently with her father's help) and Kazu (who sought the cooperation of an NGO), Aki and the Harada and Gonzales Families amassed large debts by applying through brokers. For instance, Aki was told by the broker upon her arrival in Japan that she had to pay nearly 500,000 yen for the pre-travel proceedings and interest; these debts are thought to include charges for administrative/judicial proceedings, airfare, educational expenses if employment or Japanese training was provided pretravel, apartment rent, and introduction to Japanese employers. In many cases, clearly defined contracts are not signed, and the migrants themselves do not know the details of each item's cost.

3.5 Choice of Employment

In the case of people like Aki, who travelled to Japan through an agency, employment arrangements are often made upon their

arrival. People who have acquired Japanese nationality or resident status are matched with Japanese temporary employment agencies. For instance, a few months after Myla registered with a broker, she was then called by the broker for an interview with a Japanese temporary employment agency. During the interview, she learned that she would be working as a caregiver in a senior care home upon arrival in Japan. Among the many families interviewed, only three have been able to travel to Japan; Myla's family was one of those. She had not had any prior experience working in a care facility, but she was confident in her ability to serve customers and did not object to beginning her new job. Afterwards, the documents necessary for application for residence status were submitted, and their residency status was approved a few months later. The ordering of their father's Family Register—necessary for application for resident status—was done through a Japanese public notary, and the temporary employment agency served as the reference in Japan. One month later, they left the Philippines with the two other families. After arriving in Japan, Myla studied Japanese and basic care before working. The presence vs. absence of such pre-work study differs according to broker and employment agency.

After conducting document screenings or interviews, the Japanese temporary employment agency ultimately decides who to hire and the company with which they work. According to the Japanese staff of a support agency, the highest-ranking families in terms of interviews, language, and other tests work in care facilities, the next-highest-rated ones in semiconductor and similar factories, and lower-rated ones in food and similar factories. Furthermore, inquiries from temporary employment

agencies to factories sharply decreased after the Lehman Shock in 2008. However, the demand for personnel in care facilities still exists; this has led to a large percentage of Japanese–Filipinos being sent to care facilities¹⁷. Further, as personnel managers of certain companies are bound to institutions through their acceptance of personnel through EPAs, they say that they prefer to accept nonbinding people like Japanese–Filipinos who are employed with resident status. In addition, the manager said that Japanese–Filipino people’s mothers have to come to Japan with their children with legal status; thus, they tend to settle in one place rather than hopping around for better job opportunities, unlike Japanese descendants/*Kyu-Nikkeijin*, who came with second- or third-generation status and thus higher mobility¹⁸. According to a survey by the Research Association of Filipinos Caregivers in Japan, many Filipinos residing in Japan seek care labor themselves, raising their high social evaluation of Filipinos in Japan as their motive (Takahata 2010). Japanese–Filipinos are urged to pursue intimate labor, such as that in care facilities, by employment and mediating agencies rather than selecting their own occupations.

Ever since the issuing of entertainment visas became more rigorous, there has been a chronic shortage of entertainers, and the majority of Filipino pubs have disappeared. However, Filipino pubs survive in entertainment districts such as those in Sakae in Nagoya and Gion in Kyoto. Since there are almost no Filipino women working with entertainment visas, the ones

who work there include Filipino residents in Japan who are married to Japanese people and have long-term resident visas, Filipinos who came to Japan through counterfeit marriages, single mothers of Japanese–Filipinos, and Japanese–Filipinos themselves. Rika applied for Japanese nationality from the Philippines and came to Japan through a broker. At first, she worked as a cleaner in business hotels, but after 6 months, the temporary employment agency told her to work in “a store.” Rika was unwilling because of her rudimentary Japanese and shy personality, but she was told that she had to work there to repay her debts. Amelia came to Japan with her 7-year-old daughter, Alisa in order for her daughter to acquire Japanese nationality. However, Alisa’s father would not respond, and negotiations are still ongoing. She was often told by her broker to work in a pub, and she began her employment the day after her arrival in Japan. There is nearly no freedom of choice in terms of employment when coming to Japan through a broker; temporary employment agencies choose their deployment based on market trends. As the market for production jobs, such as factory labor, is currently dwindling, current market mechanisms lead Japanese–Filipinos to the sector of intimate labor in order to meet the needs of Japan. As there are no definite regulations regarding working hours and wages, unlike the cases of EPAs, trainees, or interns, they are less likely to be under the supervision of government agencies. Thus, the presence/absence of preemployment training and introductions to employers take place

¹⁷Based on an interview by the author in Cebu on November 29, 2008.

¹⁸Based on an interview by the author in Tokyo on July 2, 2010.

at the discretion of brokers and temporary employment agencies.

4 PROBLEMS ARISING AND INTIMATE LABOR

This section will address four issues—1) employment, 2) children’s education, 3) intimacy expectations, and 4) instability of identity from the concept of intimate labor—and interpret the daily problems faced by Japanese–Filipinos upon their arrival in Japan.

4.1 Employment Problems

The first problem Japanese–Filipinos face upon arrival in Japan is trouble in the workplace. First, there is constant dissatisfaction regarding wages. Monthly salaries and debt repayment periods vary according to temporary employment agency and broker. Myla works for 900 yen per hour (i.e., an after-tax monthly salary of about 140,000 yen). She is paid on the same scale as the Japanese staff. However, 25,000 yen is withheld monthly to repay the broker for visa application charges and three airline tickets from the Philippines. Furthermore, 60,000 yen is withheld for rent, and only about 50,000 yen remains after utility and communication charges. Therefore, she must support her family of three and send money to support her family in the Philippines on this amount.

Kumi was working as an apprentice for the first 3 months and earned 450 yen per hour for that period. She could only pay for rent and meals for those 3 months. Since then, her wages have been raised to 750 yen an hour, but her timecard was ignored when she worked overtime, and she was considered to have worked 6 hours daily. She worked 20 days monthly for 4,500 yen

daily, so her monthly salary was about 90,000 yen (i.e., 70,000–80,000 yen after tax). Of that, 20,000 yen was withdrawn for rent at the communal-living apartment she shared with eight people and 15,000 yen for meals.

Roselyn, who works as a cleaner, has an even-more-exacting livelihood. She works 10 hours daily at hot-spring facilities and business hotels but only receives 2,000 yen daily. Roselyn does not know the details of how much debt she owes nor how much she is repaying per month; thus, she tried to negotiate with the temporary employment agency when her daily wages were decreased from 3,500 yen to 2,000 yen. However, her manager told her “stop nagging” and denied her attention until the supervisor at the company began saying that they would make her 19-year-old daughter, Rika—who was working as a cleaner—begin working at a pub. Roselyn herself had come to Japan as an entertainer when she was young, and not wanting her daughter to work at night based on her experiences, she pleaded with the company, but she was told, “This is the only way to repay your debts.”

These examples provide a glimpse into the unequal relationships between laborers on the one hand and employment agencies and brokers on the other. With regard to the scrupulous checks of her residence and new address by the temporary employment agency after arriving in Japan, Myla said, “They want to know everything, but they will not cooperate. They control everything, so it is very stressful, as it feels like they are always watching.” The recruiting agencies and temporary employment agencies in Japan manage all information regarding passports, residency status, contracts with corporations, and the numbers of absences and days tardy.

In addition, many migrants around age 20 years have had no work experience in the Philippines and do not know their rights as laborers. Thus, trouble occurs with their employers in many cases. For instance, they may not have received explanations from their employers regarding how to claim paid holidays or leave, how taxes and insurance are subtracted from their salary, or other factors, which they might not understand due to lack of proper communication. Further, the Haradas had next to no knowledge of Japanese social insurance, including medical insurance, at the time of her interview with the author. It could be said that Japanese temporary employment agencies bring Japanese–Filipinos into the country in order to save on expenses such as social security.

Boris and Parreñas suggested that intimate labor is “usually considered to be a nonmarket activity or an activity of low economic value that should be done by lower classes or racial outsiders” (Boris and Parreñas 2010, 2). The reason why they are only paid minimal wages for their labor is that intimate labor is done without compensation at home; therefore, it is seen as having low economic value when performed by Japanese–Filipinos. Furthermore, brokers and temporary employment agencies hire Japanese–Filipinos as a source of cheap labor, taking advantage of their weaknesses of language difficulties or lack of information. The troubles Japanese–Filipinos and their mothers face in the workplace are founded upon gender, ethnicity, and class inequalities.

4.2 Education of Children

Next, I will consider the education of Japanese–Filipino children. As stated before, a Japanese education may be a motive of the mother or the Japanese–Filipinos himself

or herself, but in many cases, the conditions upon arrival in Japan are harsher than they imagined. Here, I will introduce the cases of 1) Itos’ daughter, who came to Japan in early childhood, attended a Japanese day-care center, and goes to elementary school; 2) Gonzales’s son and daughter who came to Japan when they were upper-elementary and junior-high-school students, respectively; and finally, 3) Eiji, who came to Japan after graduating from high school in the Philippines.

Amelia’s 7-year-old daughter Alisa attended a Japanese daycare center for 2 years and is currently in the first year of elementary school. She is able to write in hiragana and katakana, but her homeroom teacher told Amelia during a meeting that she becomes linguistically confused, and her speech is poor. She was told to think about having her study in a special-needs class if she could not keep up with the class. This was unexpected for Amelia: She thought that her daughter had forgotten Filipino, since she would not speak in Filipino. Moreover, she thought her 7-year-old daughter spoke Japanese far better than she spoke her own rusty Japanese.

Myla, who came to Japan with her late-elementary-school and middle-school children, wanted her children to have a Japanese education. Upon arrival in Japan, her children were enrolled for a brief period in public elementary and middle schools near the employment agency and were given the minimal Japanese-language education needed to be integrated into Japanese-language classrooms. As Myla was dispatched to a care facility 2 months later, they transferred to different schools as well. Marc, who was aged 15 years at the time, went to a middle school, and Mika, who was aged 11 years, went to an elementary school. However, even now—after 1 year has passed—they both

find it difficult to keep up with the Japanese classes, and the older brother, Marc—who transferred during his second year of middle school—could not keep up with the classes whatsoever. He was a high achiever in the Philippines and dreamed of becoming a doctor, but in Japan, he could not even make it to high school, thus after his graduation from middle school, the school and the job-placement office found him a job as an electrician. However, he says he is not treated as a regular employee because of his problems with the Japanese language ability. His sister, Mika, who was also a high achiever in the Philippines, took her final exams without being able to read the exam questions, leading to failing marks. Her homeroom teacher said during a meeting that it was uncertain whether she could maintain the Japanese-language and academic abilities necessary to pass even high-school entrance examinations. Moreover, Mika has noticed she could not totally fit in to Japanese friends because of the cultural differences. She said “People here are so “plastic””. “Plastic” is an expression that people often use in the Philippines to describe the unreal and superficial interpersonal friendship.

Young people aged ≥ 15 years who come to Japan without Japanese language ability have almost no chance to enter regular high school. Furthermore, it is nearly impossible to take college entrance exams without having graduated from a Japanese high school. Moreover, many of these young people have very few chances to learn Japanese anyway. Eiji, aged 20 years, went to nighttime high school to study Japanese, but the high school that accepted him was over an hour away from his workplace by train, and it was too

physically demanding to go to school after his job finished, so he quit midway. Rika and Kazu also wanted to go to university, but they could not save up for the school fees with their current work conditions, and they had no spare time in which to study for the examinations. Furthermore, they could not apply for international student scholarships for which foreign students are eligible, as they have Japanese nationality¹⁹.

As seen here, the language and cultural differences and the institutional “gap” force great risks on children at whatever age they arrive in Japan. Japanese-language classes conducted by NGOs and volunteers are on the rise in areas with high populations of foreigners, and local governments are making similar efforts. However, this knowledge is not accumulated nationally, and no comprehensive support measures have been taken. Therefore, troubles in education continue, and children are neglected: their low levels of education and lack of school attendance are still issues, resulting in them being unable to break the cycle of employment as simple laborers due to lack of education. Though they possess the right to reside in Japan and may have Japanese nationality, they are not given equal opportunities for education. For Japanese–Filipinos, migration to Japan is made possible by the child’s nationality, and their mothers are approved for residency and work as their guardians. Formulation of an institutional support system to lower the barriers blocking these children access to education is urgent.

Until now, the discussion of intimate labor has focused on women’s labor, but careful consideration of the education and rearing of their children and their familial

¹⁹In Japan, the so-called “scholarships” offered by the Japan Student Services Organization require repayments, but in the Philippines, scholarships are considered as grants that do not have to be repaid.

relationships is required. Next, I will discuss the “intimacy expectations” that mothers of Japanese–Filipinos face.

4.3 Intimacy Expectations

Mothers are posited by the institution of the Japanese Immigration Control Act as the guardians of Japanese nationals. Arranging organizations also offer “mother-child packages” and send the mothers to labor market in Japan. However, it is not easy for a single parent to raise children while working full-time. The conflicts and anguish these mothers face, aside from the employment-related and educational problems written above, may result from the “intimacy expectations” imposed on the mothers by both the Japanese and Filipino societies.

When Amelia was living in Japan as an entertainer, she was dating a man whom she knew as a customer. When she found out she was pregnant, she wanted the man to marry her or at least recognize the baby, but the man refused. She had no choice but to give birth to and raise her child in the Philippines. Even after giving birth, she travelled to Japan as an entertainer several times, leaving her child in her parents’ care. Her current entry into Japan was as the guardian of her child with resident status, and she is now working in a pub. She comes home at 3:00 a.m. and wakes up with her daughter at 7:00 a.m., then does housework after sending her daughter to school. She takes a nap in the afternoon if she has time and prepares to go to work in the evening. She picks up her daughter at 3:00 p.m. and leaves the house at about 6:00 p.m. While Amelia is working, she either leaves her daughter with a Filipino family that lives nearby or lets her watch a DVD by herself. She lives a life of working at night as she raises her young child.

It was easy coming [to Japan] alone, because I only had to take care for myself. Now I have to take care of my daughter, and it is twice the trouble. I am happy to see my daughter grow, but there are times when it is tiring with just the two of us. My mother and siblings helped me out very much in the Philippines. We were raising my daughter together. Here, I am raising her alone.

This burden as a mother may originate from the “intimacy expectations” that both the Japanese and Filipino societies place on them. Here, intimacy expectations refer to those based on blood or territorial relationships that are imposed by one’s friends and acquaintances and require intimacy. In Filipino families, the ideology exists that women determine undertakings regarding the emotional needs and expectations of family members (Medina 1991). The recent feminization of immigrant labor comes from the motivation to work and send money to provide better education and lifestyles for their children. The Japanese–Filipino people I interviewed all sent money back to their Filipino families, regardless of whether they could support themselves with their low salaries. There is a sense of urgency in sending money, as regardless of the distance between them, they must meet these expectations, “since they are family.” When Myla’s mother passed away, she bore most of the funeral expenses herself; this was the responsibility of Myla as the overseas worker in the family. They work themselves to the bone, even while feeling crushed by such pressure from the Philippines. Migrants are expected to be economic breadwinners for both their immediate families and other relatives (e.g., their grandparents, uncles, aunts, and

cousins in the Philippines) because of their blood intimacy.

Meanwhile, they must respond to emotional needs of their families as well (Parreñas 2001, 144). Unlike Filipino household laborers who go to work in Asian countries, most mothers of Japanese–Filipino people accompany their children as guardians, so their family unification is accomplished from the beginning. However, their family structure drastically changes from that when they were in the Philippines, and both mothers and children must adapt accordingly. When in the Philippines, many of them live communally with the grandparents, uncles, aunts, and cousins on the mother’s side. Moreover, relatives besides the mother often participate in child rearing. However, upon arriving in Japan, the child and mother become a single-parent nuclear family. In other words, the “parenting” duties—including emotional and moral care—belonged not only to the mother but were divided among other family members in the Philippines, while the situation is different in when they reside in Japan.

This is not only a problem of family members’ contributions to child rearing; they may also be pressured by intimacy expectations in Japanese society. Though Ochiai mentioned that the image of woman in East Asia as “dutiful wives and devoted mothers” has changed and been reformulated throughout history (Ochiai 2012, 10–14), it is possible that Filipino residents in Japan are still pressured by these traditional Japanese value judgments.

To give an example during participant observation I conducted in an elementary school, elementary school teachers expect the mothers to provide “leadership” in actions such as the following: writing parental comments in the correspondence notebook every day; looking over their

child’s homework even when tired from work; providing a lunchbox with several types of side dishes during field days; and phoning the school when the child is home with a cold. These things are taken for granted among Japanese mothers but these are certainly detailed-oriented cultural value that Filipino mothers would not place much value on. In other words, there are many jobs in Japan that are imposed by friends and acquaintances and must be done “because [one is] a mother.” This does not stop at parenting, as not only blood-related intimacy but also territorial or school-related intimacy is expected: people are expected to live in the same apartment complexes, cooperate with others who send their children to the same schools, trust the schools, and make efforts to build good relationships with their schools.

As demonstrated here, there is a discrepancy between the intimacy expectations of Japanese and Filipino societies. However, whether or not the concerned parties seriously grasp these imposed expectations is another story. The intimacy expectations imposed by these two societies are not considered symmetrically, but the norms that should be followed change according to the person or length of residence. For instance, some mothers work themselves to the bone to send money and meet the expectations of the Philippines but do not accept the pressure imposed by Japanese schools. Either way, the number of intimacy pressures causes them to encounter conflict.

4.4 Unstable Identity

Next, I consider the identity of young people who come to Japan individually. As stated before, the majority of Japanese–Filipinos come to Japan with a “longing” for Japan. However, the country to which they “returned” does not welcome them

warmly. Their human relationships with Japanese people and Filipinos in the workplace often cause the identities of Japanese–Filipino people to become unstable. For instance, Aki said the following:

I do not have many friends in Japan, so I do not feel at home. I have Filipino friends, but most of them are older than I. I would love to make Japanese friends so I could talk to them, but I have no time because I am busy with work. After coming here, I really felt that Japan is a country for Japanese people. I knew that a Japanese person would receive an hourly wage of 850 yen to do the same job that I do. Even though I have Japanese nationality, I cannot speak Japanese, so I am considered Filipino. Is that not unfair? So, once I have repaid my debts, I have been thinking of studying Japanese and studying for the Home Helpers Level 2. I received a pamphlet for their lecture earlier.

Despite having Japanese nationality herself, Aki thinks that she is not treated equally to Japanese people in the workplace and has been excluded in ways that made her feel that she is not “Japanese.” Her goal of acquiring the Home Helpers Level 2 license is based not only on career advancement and improvement of her Japanese-language skills but also on her desire to be accepted as “Japanese.”

Espiritu (2002) described *social process* as “the continuous process whereby people define and redefine their ethnic identity” (Espiritu 2002, 149). It can be said that their internal rankings of their two homes of Japan and the Philippines in their youth—with ambivalent feelings towards each—is the social process that builds identity. Fur-

ther, Barth (1969) wrote that the “ethnic boundary” is a crucial viewpoint for analysis of the process of identity formation. Takahata (2011) expressed concern about the human relationships experienced in the workplace by Filipino caregivers residing in Japan due to conflicting ethnic relations (p. 29). For Japanese–Filipinos, this is not simply a dichotomy between Japanese people and Filipinos but a serious problem of identity that shakes the foundations of who they are. Note the gap that exists between legal Japanese nationality and social recognition as “Japanese.” This difference produces an unstable identity in Japanese–Filipinos, and this lack of sense of belonging can give rise to confusion or conflict.

However, to which of these conflicting ethnicities, “Japanese” or “Filipino,” do they feel they belong? Further, how are they able to overcome the conflict that stems from their unstable identities? I will now introduce the case of Eiji.

At the care facility in which Eiji worked, besides the Japanese employees, there were two Japanese–Filipinos and a number of Filipinos, including Nikkeijin from Davao and their spouses. He describes his work as seen below.

The grandpas and grandmas here nicknamed me “Ei-chan,” and they are very fun people. They remind me of my grandmother in the Philippines. The kitchen is really busy, because we have to make food for dozens of people at once, but it is worth it. The company president expects much from us and said he would let us go to high school... It may be tiring, but I want to keep working here.

The manager of the facility lets Eiji and the other Japanese–Filipino worker attend night

high school and provides flexibility when it comes to shift scheduling Eiji believes that as he has Japanese nationality, he receives a different salary than the other Filipinos, and he is allowed to revisit his homeland. However, that has caused the Filipinos in his workplace to be jealous of him. In the end, unsatisfactory human relations in the workplace caused Eiji to resign from the care facility. Eiji has returned to the Philippines several times in the 4 years since his first arrival in Japan and enjoyed time off with his family and friends. In his short duration of stay, he made a girlfriend and got married. Now blessed with children and having started his own family, supporting them has become his drive for his work in Japan.

This example shows that while Eiji experienced an unstable identity, he created relationships with his clients and manager that overcame ethnicity and is trying to escape the framework of either “Filipino” or “Japanese” ethnicity that others force on him. He has built intimacy with Japanese men, such as his clients (who call him by a Japanese-style nickname) and his manager (who treated him like a father). Intimacy unrelated to blood ties or ethnicity, fostered in places like care facilities, can break through the instability of identity. The concept of intimacy that dissolves blood relations may be effective in raising often-discussed questions about identity and ethnicity in terms of blood relations.

CONCLUSION

In this article, I discussed the institutionalism of the migration of the Japanese–Filipinos, the new actors on the stage of Japan, and the problems that occur after migration from the concept of intimate labor. It became clear through

previous research that intimate labor is deeply connected to the immigrant labor of Asian women. In this paper, I showed that the children of Japanese–Filipino migrant women also migrate in the same way as their mothers or migrate accompanying those women to enter employment. Thus, I argue that these cases deserve attention in the academic discussion on intimate labor.

This article clarified that even Japanese–Filipinos with Japanese nationality or resident status often lack human networks or information related to employment and have no choice but to rely on the support of mediating organizations. Through introductions via mediating organizations, they are encumbered with massive debts and even restricted in their choice of employment.

The problems faced by migrants upon arrival in Japan include employment, education, intimacy expectations, and unstable identities. Their problems in employment include massive debts, low salaries, human relationships with workplace staff, and management by temporary employment agencies. While intimate labor is consumed labor, it is considered as having a low economic value in most cases. Moreover, regarding children’s education, the cases examined show that differences in language, culture, and educational systems are a great burden on children at whatever age they arrive in Japan. When considering intimate labor, it is necessary to mention parent-child intimacy. Furthermore, the mothers are pressured by the “intimacy expectations” of both Filipino and Japanese societies. 5) Finally, the conflicts that arise from human relations in the workplace were observed to cause instability in the identities of Japanese–Filipinos. On the other hand, a new indicator may be added by using the concept of intimate labor when the concepts of identity and

ethnicity derived from blood relations are too complicated.

This paper interpreted the cases of Japanese–Filipinos, who had just barely come to Japanese society, as actors through the new concept of intimate labor. Up until now, explanation of the problems of Japanese–Filipinos involved questioning their relationships with their Japanese fathers and pursuing their blood relationships or ethnicity in Japan. However, such consideration alongside the concept of intimate labor creates the challenge of taking a viewpoint that does not involve reproductive issues. However, in response to the question, “Was reproductive labor wrong?,” the conceptual differences between the two have not yet been shown. It may even be necessary to include intimate labor alongside reproductive labor.

It is necessary for people who perform intimate labor to remember that they are not just simple laborers but must be accepted as citizens with families. This will require the positive monitoring of both Japanese and Filipino NGOs who have the expertise to assist Japanese–Filipino people as well as administrative cooperation. There are many issues, particularly in the area of children’s education. While the Ministry of Education, Science, and Culture’s report, “Number of Foreign Children Students Requiring Japanese Training,” showed that the number of children in Japan whose mother tongue is Filipino is increasing yearly (Ministry of Education, Science, and Culture, 2011), it is urgent for teachers, administration, government, and researchers to cooperate to ensure their academic security. To ensure migrants’ economic and mental independence in Japan, employment support, improvement of employment conditions, and educational support for their children are necessary.

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Internationalization of Care and Harmonization of Skills Beyond National Borders

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1 PURPOSE OF THIS PAPER

The purpose of this paper is to investigate the harmonization of skills in nursing and care work through the example of the Economic Partnership Agreements (EPAs) between Japan and the Philippines (JPEPA) and between Japan and Indonesia. These agreements, which facilitate Japan's receiving of nurses and care workers from both countries, are virtually the first such experience in the history of Japan. However, because skills are often defined and managed by national authority, analysis of skills harmonization would provide a good example of how globalization is negotiated in the process of government-to-government bilateral agreements.

Skills harmonization is a process of mutually recognizing the skills and qualifications among different countries. The significance of skills harmonization will likely increase in the future, considering the regional integration under mode four of the General Agreement on Trade in Services (Buchan, Kingma, and Lorenzo 2005, 11) and other free trade agreements that include transfers of persons (Lowell and Findlay 2001).

This paper mainly focuses on harmonization in the process of EPA negotiation between Japan and other countries.

The EPA free trade agreements came about after 2000 and aim to facilitate free trade on a bilateral basis, in contrast with the WTO agreements, which seek to facilitate trade on a multilateral basis. In the process, the Philippine government proposed sending domestic workers, nurses, care workers, and others. The Japanese government agreed to accept the latter two as highly skilled workers. However, to accept these workers, both governments had to narrow down the skills differences and harmonize the workers' qualifications.

It is easier to harmonize skills in nursing than in care work because of the absence of a concept of professionalized care work in demographically young countries such as Indonesia and the Philippines. Even in research on EPA transfers of workers, skills harmonization has not been part of the academic study. Vogt (2007) analyzed migration politics and discourse around the JPEPA and found great disparity between policy and reality, resulting in the political conservatism of Japanese immigration policy. Suzuki describes Japanese immigration policy and the EPA negotiation process before it began in 2008; the process was affected by tight control on "entertainer visas." The unique aspect of Japanese immigration policy is that even with the demographic changes and the

undersupply of care workers and nurses, opening the labor market to foreign countries came about from outside pressures and the supply side (Ogawa 2012a). The EPAs are no exception. Hosono (2012) perceives problems in both the initial policy design decisions and the policy implementation that explain the very small number of people who pass the examination. A series of studies point out the problems of implementation regarding language, training, efficiency, comparison of examinations, labor markets, and other aspects (Asato 2012, Hirano et al. 2012, Kawaguchi et al. 2012, Ogawa 2012b, Ono 2012). Masako Itami, Yoshinori Morooka, and Kiyoshi Itami (2010) clarified the institutional framework of the bridging program in the process of bringing in internationally educated nurses.

The author of this paper does not describe the institutional framework of the EPA movement; information on the framework is available from the Ministry of Health, Labour and Welfare (MHLW) of the Japanese government,¹ the Philippines Overseas Employment Administration,² BNP2TKI,³ and other sources.

2 THE PROCESS OF NEGOTIATION

Japan has been promoting liberalization of trade through the WTO since shortly after World War II. However, multilateral coordination proved difficult, especially

with developing countries; the execution of bilateral free trade agreements (FTAs) was accelerating globally, and China and South Korea developed stronger economic partnerships than did Japan with nations such as the ASEAN countries. There was a growing fear that Japan would be locked out of the Asian market; therefore, in mid-2000, Japan started to focus on its own FTAs.

Japan had to make up for its late entry into the world of FTAs. The Ministry of Economy, Trade, and Industry (METI), for example, increased the number of officials working on FTAs, and, in March 2004, held a ministerial conference to enhance interministerial coordination. The fact that agriculture was also included in the negotiations meant that some friction between ministries was predicted.

Negotiations with the Philippines started at a top-level summit in May 2002, when President Arroyo proposed a working group on economic partnership to Prime Minister Koizumi. At the end of the year, a Japan–Philippines Economic Partnership Task Force was launched; it consisted of both researchers and representatives from the private sector. The task force's aim was to create a more comprehensive EPA that addressed not only tax reduction on goods but also liberalization of investment and services and transfer of workers. In terms of worker transfers, the government of the Philippines proposed that Japan accept domestic servants, babysitters, nurses, care

¹Accessed Feb. 28, 2013. <http://www.mhlw.go.jp/english/>

²Accessed Feb. 28, 2013. <http://www.poea.gov.ph/>

³BP2TKI is an acronym for *Badan Nasional Penempatan dan Perlindungan Tenaga Kerja Indonesia*. Accessed Feb. 28, 2013. <http://www.bnptki.go.id/>

workers, and others. President Arroyo was struggling with high unemployment at the time and had made securing new sources of employment her flagship policy. The Federation of Economic Organizations (*Keidanren*) of Japan also had a positive attitude toward accepting medical and welfare workers in order to prepare for the challenges of an aging society.

2.1 Background and Framework of Acceptance

The liberalization of labor involves coordination between several ministries. METI and the foreign ministry promote it, the Ministry of Health, Labour and Welfare has a cautious stance toward it, and the Ministry of Justice (MOJ) does not oppose it as long as it fits within the current immigration-control framework. The reason the MHLW has adopted a cautious position is that in 2005, the supplies of both nurses and qualified professionals could cover the demand of social-welfare positions. At the same time that the aging of the population created demand for as many as 10,000 new care workers each year, the number of students taking home-care-worker-training courses hovered around 30,000, which led to the belief that there was a sufficient supply of workers.

The MOJ had a particular problem with the acceptance of care workers. Care workers are classified as unskilled workers in Japan, although this classification is not explicit; this means that foreign care workers were not accepted into Japan. To accept unskilled workers would require a revision to the Immigration Law, and because that would require the agreement of the DPJ, who had expressed disapproval, the Ministry

of Justice was doubtful about the prospects for revision. If the care workers had been classified as specialist welfare professionals, it would have been easier to obtain agreement from the relevant ministries.

3 DEREGULATION AND NURSING

The author divides the process of harmonization into two components. One consists of the deregulation during the era of former Prime Minister Koizumi after 2004.⁴ This is the time when the deregulation of healthcare workers was addressed by the government. The second component is the process of EPA negotiation, particularly with the Philippines, which started in 2002, was agreed upon in principle in 2006, and enacted in 2008. These have been the main events in the history of the harmonization of qualifications for nursing and care work.

The Japanese government carried out a deregulation program for the activation of economic activities called *kozokaikaku-tokku*, or Structural Reform Special Zones. This program is a part of the comprehensive structural reforms that started during the administration of Prime Minister Koizumi, and under the deregulation program, the private sector or local governments propose deregulation to conduct extralegal local economy-activation programs so that the government might apply both local and national deregulation.

In 2004, there were more than 10 applications for nursing and care work; these mainly involved receiving foreign nurses and care workers, educational programs, skills recognition, abolishment of recruitment,

⁴This is based on the Act on Special Districts for Structural Reform, which was enacted in 2002.

and limited duration of working contracts. The series of applications was addressed by the media, and it impressed upon nationals the lack of nursing and care-work staff in the country. According to the present author's research, the Ministry of Economy and Trade lobbied medical and welfare organizations to apply for the deregulation program; in other words, the deregulation program was tooled as a public advertisement. A METI officer told the author that it was not proper to suggest policies two steps ahead of real conditions; instead, it is appropriate to propose policies only a half-step forward when enacting policy change. This implies that deregulation was a step toward making the public mood receptive to healthcare workers from abroad, particularly through the EPA program.

Let us examine the proposals submitted to deregulation programs regarding nursing and care work, because they are related to the international opening of the labor market and thus to the harmonization of skills. Harmonization of nursing is relatively easier than that of care work, largely because of the difference in the care-work concept between aged societies such as Japan and demographically young countries such as the Philippines and Indonesia.

The proposals on nursing include the following: mutual skills recognition, qualification of candidacy for the nursing examination, extension of stay for foreign nurses who pass Japanese examinations, and admission of foreign nurses to Japanese nursing schools.

Regarding the acceptance of nurses from abroad, mutual skills recognition that would automatically accept foreign nurses' qualifications as equivalent to those of Japanese nurses was rejected because nurses are responsible for human lives. Therefore, the profession requires skills and special

knowledge as well as Japanese-language capability, and nursing examinations confirm these required skills and knowledge. Therefore, mutual skills recognition is not accepted.

The next issue was the qualifications for candidacy for the National Nursing Examination. The cabinet office of the government decided in March 2004 to provide the qualification to all foreigners in certain conditions; previously, this qualification was only provided to permanent residents. This was also a part of the deregulation process under the "three-year plan for deregulation and privatization." This is an important change in terms of receiving nurses into Japan: if a foreign nursing education is considered equivalent to a Japanese one, then foreign nurses might have access to the National Nursing Examination without having to finish their nursing education in Japan. However, a language requirement was added: a prospective nursing candidate should score in the first grade or at the N1 level on the Japanese-Language Proficiency Test. The effect of the change is that it is possible for foreign-educated nurses to pass the nursing examination of Japan. This is a big change in that qualification for candidacy is now open to non-permanent residents even though acquisition of N1 is not easy.

However, there was another barrier faced by foreign nurses hoping to work in Japan. The Immigration Law already listed nursing as an allowable occupation category for purposes of medical visas in the 1950s. However, this arrangement was enacted for the purpose of international medical cooperation, and even after the acquisition of Japanese nurse licensure, visiting nurses were allowed only 4 years' stay in Japan because they were supposed to work in their countries of origin. Therefore, because of the limited duration of

their allowable stays, foreigners gained little advantage from obtaining nurse licensure and working in Japan. One application within the deregulation program suggested abolishment of the limited duration of stay. Regarding this, the MHLW announced that because the visas were not being granted for the purpose of encouraging the entry of foreign nursing staff, the 4-year maximum stay was appropriate for the purposes of international cooperation. However, this limit was later relaxed, and foreign nurses who earned Japanese licenses were allowed to stay in Japan for 7 years; ultimately, the limitation of duration was abolished in 2010. This brought about a change in the influx of foreign nurses to Japan from almost zero before the deregulation. As Asato (2012) indicated, the number of applicants and license holders has increased rapidly since 2006. According to undisclosed MHLW statistics,⁵ the number of foreign nurses who took the exam rose from 32 in 2006 to 85 in 2010; the passing ratio skyrocketed from 50 percent to 98.8 percent in that period. The applicants were mostly Chinese people who studied Japanese in both China and Japan and began working in Japanese hospitals while preparing for the exam. These increasing trends show that deregulation has broadened opportunities for foreign nurses; this is a byproduct of the EPA, though the passing ratio and the number of passers both surpass those of the EPA. Therefore, there is a possibility that had the opening process started with the EPA, Chinese nurses would currently be mainstreamed.

Another purpose of the regulations was to admit foreign nursing students to Japan—in other words, for the MHLW to acknowledge credits from foreign schools.

The Ministry commented that because the Japanese nursing curriculum was constructed from 3 years of lectures, practice, and internship, it would not be easy to recognize a diversity of international educational systems. This also changed later, as mentioned above, in that foreign nurses can now take the national examination.

In short, the following points were addressed: the legitimacy of receiving foreign nurses and care workers under the Immigration Law, the absence of mutual recognition, the recognition of educational credits, the domesticity of human-resources development, qualifications of candidacy for the National Nursing Examination, and the maximum duration of stay for non-Japanese license-holders. However, the total negation in the deregulation process clarified exactly what was to be harmonized in the process of EPA negotiation.

Even though each of those proposals was rejected on the grounds of either ongoing EPA negotiations or emphasis on the importance of a national framework for medical provision, the deregulation proposals clarified the kinds of nationality clauses and domestic regulations that exist in the nursing and care-work fields.

4 CARE WORK AND HARMONIZATION

4.1 Overview of Certified Care Workers (*Kaigofukushishi*)

Certified Care Workers have more than 20 years of history. The Certified Social Workers and Certified Care Workers Act was passed by the 108th parliament on May 21, 1987, and was enacted on the 26th of the same month. National qualification

⁵The statistics were obtained from a congressperson.

of care workers was based on this act, and anyone who did not hold this qualification could not call himself/herself a Certified Care Worker.

Currently, there are more than 900,000 *Kaigofukushishi* certificate holders. A *Kaigofukushishi* certificate can be obtained through the following two major paths: An examination after 3 years' working experience or a schooling track that provides a certificate after finishing designated schools. There is currently no examination for the school track; however, a 2007 proposal for the purpose of exam standardization across all paths would have required a national examination for the school track after 2012. This was postponed and is now planned to begin after 2015.

Although it is estimated that half of nursing homes are short on care staff, the MHLW might not define staff shortage in the same way in that it counts the total sum of certificate holders—including inactive ones—as the labor supply. As of 2009, there were 811,440 certificate holders nationally, which exceeds the overall need in the labor market. Therefore, the Ministry denies any shortage in care supply.



Figure 1: Method of Acquiring the Certified Care Worker Qualification.

Kaigofukushishi facilitate independent daily life for persons with disabilities by respecting their dignity while providing adequate assistance according to their needs. Direct care includes feeding, bathing, toileting, clothing/disrobing, and mobility; these are conducted according to the needs of the care recipient. *Kaigofukushishi* have been proceeding towards professionalization by supporting daily life and care processes to satisfy the diversified service needs that result from aging.

Furthermore, under Long-Term Care Insurance, the structure of *Kaigofukushishi* care provision has changed greatly. First, under the previous administrative placement system, care recipients were not able to choose which type of service to receive but were sent to hackwork institutions. Currently however, care recipients can choose services from a quasi-market in which many service providers, including welfare organizations, NPOs, cooperatives, and private companies, provide services under the insurance system. Therefore, recipients have the right to choose their services.

Many welfare specialists came to understand that *Kaigofukushishi* are different from medical staff. The rapid progress of modern medical technology called the “medical model” has been revised owing to the progress of the “life model,” which emphasizes quality of life. Therefore, an aging society needs not only to cure but also to care in order to cope with aging processes.

Even with the increase in chronic and incurable diseases, the advancement of medical technology has brought a higher possibility of survival. Care facilities called *tokubetu yogo rojin homu*, which are special nursing homes for stable, older, adult residents with severe psychological and physical symptoms, were developed. *Rojin hoken shisetsu*, or intermediate care facilities for

those who are expected to recover from body malfunctions after rehabilitation, are also provided. These are care facilities rather than cure facilities. This emphasis on the life model is quite different from the previous *ryoyo shisetsu* (long-term bed facilities) and previous medical care. Professional care workers in these places respect care recipients' dignity, facilitate their independence, and aim for their self-actualization. Acute-care facilities typically provide nurses on the front lines of medical care.

Care workers, particularly Certified Care Workers, are a major class of care providers in light of the prolonged life spans of Japanese people, because the number of aged people has risen and it is not as easy as it was before for families to provide care. Therefore, there was an urgent need to remove care work from the responsibility of families; when Long-Term Care Insurance started in 2000, *Kaigofukushishi* Certified Care Workers become one of the core groups of care providers under the program.

Certified Care Workers have been required to provide not only basic assistance in daily activities but also medical care such as suction, FGT, and gastric fistulas since April 2012; this addition of responsibility was decided by the cabinet on June 18, 2010. Medical responsibilities were added in order to appropriately meet the actual demand for care on the bases of knowledge and skills. Fifty hours or more of lectures on medical care are required, including basic knowledge of medical care; basic knowledge on the procedure and practice of suction; and NGT. The public impression may be that skills harmonization is easier in care work than in nursing; however, that is far from true. Let us take a closer look at the curriculum for caregivers in the Philippines. The caregiver curriculum comes under the jurisdiction of the Tech-

nical Education and Skills Development Authority (TESDA), which maintains a general qualifications system that excludes qualifications at the tertiary education level. TESDA was formed on the basis of the Technical Education and Skills Development Act of 1994; Article 22 of that act states that standards of occupational skills are to be established by TESDA-accredited industry committees, which shall not only develop, certify, and implement qualifications but also conduct trade-skills testing.

Qualifications in the Philippines are based on skills attainment; this is a "modular system" under which various skills are combined to form qualifications. For example, qualification A is the combination of skills O, P, and Q, and qualification B combines skill P from qualification A with skills X, Y, and Z. If the industry requests the creation of a new qualification C, a training course for that qualification can be formed by taking the necessary skills and combining them into a curriculum.

Caregiver qualification is based on the Canadian caregiver-training curriculum, and the establishment of caregiver qualifications has drawn much attention since 2000, having become popular with persons seeking employment in Canada and Israel. Caregiver qualifications attracted attention once again in 2004 (at the time of the negotiation of the Japan–Philippines Economic Partnership Agreement), and the number of educational institutions establishing courses increased. However, the negotiations were postponed, and some people found themselves unable to find work even after acquiring the qualification. Currently, the establishment of a new caregiver course has not been approved.

To acquire the qualification, a minimum of 786 hours of classroom study and a practical training course must be com-

pleted. Practical training is conducted at hospitals, facilities for the disabled, facilities for the elderly, orphanages, and other institutions; however, because the number of training facilities is limited in comparison with the number of schools, people generally feel that better practical training can be received at schools connected with hospitals. Other schools conduct practical training in partnership with facilities.

The caregiver qualification is composed of basic competence, common competence, and core competence, and the content differs greatly from that for a Japanese home helper or care worker (see figure). Core competence includes not only the care of infants, toddlers, children, older adults, and people with special needs but also housework, such as cleaning, laundry, and meal preparation. However, it is considered to be a versatile qualification that may also be suitable for work in facilities.

Some of the modules are the same as those of the domestic-worker-training curriculum known as “super maid.” TESDA believes that by changing the modules, something equivalent to Japan’s care-worker training can be created. However, this seems optimistic when the results are compared with the Japanese curriculum.

The Caregiving National Certificate II qualification consists of competencies that a person needs in order to provide care and support to infants, toddlers, and children; foster social, intellectual, creative, and emotional development in children; foster the physical development of children; provide care and support to older adults; provide care and support to people with special needs; maintain healthy and safe environments; respond to emergencies; clean living rooms, dining rooms, bedrooms, toilets, and bathrooms; wash and iron clothes, linen, and fabric; and prepare hot and cold meals.

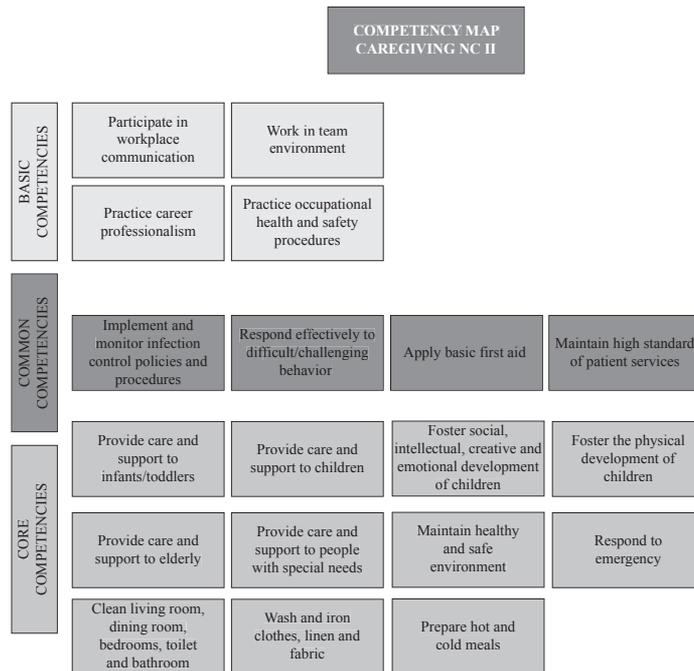


Figure 2: Competency map of caregiver in the Philippines.

A person who has achieved this qualification is competent to be a caregiver for an infant, toddler, child, older adult, or person with special needs.

4.2 The Difference between Caregivers and *Kaigofukushishi*

The curriculum composition is very different for caregivers and *Kaigofukushishi*. Japanese Certified Care Workers require 3 years or 540 full-time-equivalent working days to obtain full certification. This is very different from the standard for caregivers in the Philippines, which is set at 750 hours (roughly 6 months). Further, the contents of the curricula differ between the two countries. The Japanese Certified Care Worker curriculum is centered mostly on elder care, even though ancillary areas to elder care, including home economics and care for the disabled, are also included.

4.3 Deregulation Proposal and Care Work

At the time when the deregulation program was implemented in 2004, the admission of care workers from abroad was not permitted, because care work was not on the list of designated occupational categories under which foreigners could be admitted. Therefore, it was not surprising that there was a proposal to allow foreign care workers to work in Japan by adding care work as a designated visa category within the Immigration Law. However, the MHLW refused the proposal on the grounds of crime prevention, protection of the labor market, and ongoing EPA negotiations with the Philippines.

Another proposal was to allow and recognize care-related human-resource development, such as the granting of home-helper certificates, in foreign countries; this proposal was also rejected by the

MHLW, which felt that a course provider or certificate issuer should be authorized by a Japanese local government to ensure the quality of the educational environment via thorough management of the course provider, lecturers, facilities, etc. Human-resource development in other countries was rejected in all forms, including English-language care-work education in foreign countries; this trend is called “domesticity of human resource development.” Another reason for this rejection was the ongoing EPA negotiations with the Philippines.

However, those applications had little to do with EPA implementation because home helpers were not on the agenda of the EPA negotiations. When the negotiations on transferring workers began, the Philippine government proposed that Japan accept domestic workers, babysitters, nurses, care workers, home helpers, and others. However, considering the existing Immigration Law, which allowed only people from skilled and technical professions, the class of workers including domestic workers, babysitters, and home helpers was excluded. The Japanese government decided that nurses and *Kaigofukushishi* were eligible for admission under existing laws.

4.4 Points at Issue in Negotiation

Many proposals in the deregulation program were either rejected or postponed because of ongoing EPA negotiations. However, because it was very likely that Japan would accept foreign workers under EPAs, the way in which to harmonize skills inevitably became an issue.

Because mutual recognition of nurses was not approved even under the existing medical visa, it was not possible to recruit foreign nurses as nurses. Then the EPA provided the first opportunity



Figure 3: Framework for Indonesian Candidates.

Table 1: Harmonization under EPA.

Nurse candidates	
Skills recognition	×
Recognition of credits	○
Candidacy for nursing examination	○
Recognition as a care worker under medical insurance	○
Job description prior to acquisition of skills	Nursing aide
Certified Care Worker candidates	
Skills recognition	N/A
Recognition of work experience prior to entering Japan	×
Recognition as a care worker under Long-Term Care Insurance	×
Recognition of corresponding skills	○
Job description prior to acquisition of skills	Care work

to recruit foreign nurses who aimed to acquire national qualifications. However, what to call them was a question because they were not yet qualified as nurses or Certified Care Workers. They were called nurse or care-worker “candidates” after

heated discussion⁶ and were placed within the current category of “designated activity,” often called “other.” This is why, in the EPA, the official terminology for those nurses in Japan is “nurse candidate” or “care-worker candidate.”

⁶Interviews with EPA-related personnel at the MHLW.

The framework for acceptance is different in each partner country and between nurses and care workers. For example, nurse candidates from Indonesia need a DIII-level education⁷ or higher and 2 years of clinical experience whereas those from the Philippines need 3 or more years of experience. It is necessary for care-worker candidates to have a 4-year college degree and a caregiver certificate in the Philippines. Certified Care Worker candidates from Indonesia need a DIII-level education or higher and a nurse's license. Those from the Philippines need to have completed a 4-year university course and have a caregiver qualification approved by TESDA or must have graduated and received a degree from a nursing university.

The absence of recognition of skills requires a certain preparation period for the national licensure examination. Nurse candidates are given 3 years to prepare and can take national exams at least once yearly. However, Certified Care Worker candidates are given a 4-year preparation period, within which the first 3 years are designated for work experience to receive candidacy for the national exam; the last year is designated for taking the national exam. The difficulty for care-worker candidates lies in the fact that the MHLW does not recognize work experience outside of Japan, despite the fact that many candidates have nursing experience in their home countries. This does not seem consistent for two reasons: One is the fact that nurse candidates are recognized as at least equivalent to care-worker candidates, even though their clinical experience is not recognized. The other is that nurse candidates' education in their home countries is recog-

nized, in that they can obtain candidacy for national exams when they enter Japan, but nurses are not granted candidacy for the Certified Care Worker examination; hence, 3 years is needed.

5 HARMONIZATION AFTER THE EPA: LANGUAGE AS A NON-TARIFF BARRIER

Language is another important aspect of harmonization in that it is often described as a non-tariff barrier. Despite the fact that gaining national qualifications in Japanese is incredibly difficult, there was initially no sustainable language-education environment in place, a circumstance that became a target of criticism. The government's initial view was that its role in the acceptance of EPA workers was merely to reform immigration laws and act as a matching agent for the sending and receiving of candidate workers. These workers' training and development were considered the accepting organization's responsibility. Compared with Japanese students, for whom there is an exam-preparation environment, there are no established materials or methodology for teaching foreign students. The government was criticized for passing the task of preparing foreign workers for examinations onto accepting organizations, such as hospitals and care homes, which are not primarily educational institutions. Thus, in 2010, the government invested over ¥800 million in e-learning, development of educational materials, schooling, visiting students, and assistance with educational costs in order to create a proper educational environment.

⁷Secondary plus 3 years of nursing education.

As mentioned before, to earn candidacy for the national examination, foreign nurses are required to reach the N1 level on the Japanese Language Proficiency Test in addition to having nursing credentials. However, EPA candidates are exempt from this requirement. Even though all candidates receive language education both in their home countries and in Japan after arrival, no language-proficiency requirement was imposed through the EPA. Therefore, successful EPA applicants can obtain candidacy for the national examination after arrival.

The government cabinet office even decided to revise the national examination in June 2010 as a special consideration towards the EPA and other factors. “Consideration for EPA-Accepted Nurse and Certified Care Worker Candidates” was a reform item on the treatment of nurse candidates who arrived in Japan; it dictated that from 2010 onwards, “We will look into replacing abstruse terms used in the national nursing examination and certified care examination with simple Japanese terms (as long as they do not cause confusion in the workplace) and adding *rubi* or phonetic readings to the kanji. Our conclusions will be reflected in the exam questions we create.”

Here are some ideas and policies for addressing Japanese reforms:⁸

1. *Replacing difficult terms with simpler language*

It is believed that replacing specialist terms used by doctors and nurses with simpler terms will make them easier to

understand. Terms considered beyond the difficulty level of the Japanese Language Proficiency Test Level 1 were deemed suitable for replacement.

2. *Addressing difficult kanji*

Phonetic writing (*furigana*) of technical terms that cannot be replaced with simple terms and that contain kanji that are not in regular use will be considered.⁹

3. *Making vague expressions clearer*

There is a tendency toward vague expression in Japanese; the subjects, predicates, and objects will be made clearer.

4. *Splitting up compound words*

Long compound words will be split up, as long as their meaning is not affected.

5. *Writing English alongside specialist medical and nursing terms*

When considering the current state of nursing education in Indonesia and the Philippines, it is believed that the English names will be of assistance to candidates. These could also benefit Japanese candidates in this globalizing world.

e.g., 糖尿病 → 糖尿病 ‘diabetes mellitus’

Even with these changes, opinion is divided, particularly on whether adding *rubi* (phonetic spellings) to certain Japanese words will be beneficial for nurse candidates. It would be a mistake to think without consideration that adding *rubi* will necessarily encourage understanding. Some say that this change will exacerbate the misunderstanding of foreign nurses as substandard.

⁸“Collected Results of Expert Investigation Teams into the Terms that Appear in National Nursing Examinations,” interviews, etc.

⁹For example, 脆弱 (*delicate*, kanji character); ZEIJAKU (phonetic spelling).

The change in the language of the national examination signifies that the government was significantly concerned about the passing ratio of the examination. However, the change in language does not necessarily imply favoritism over foreign candidates because there was strong opposition from the MHLW. The feedback on the revision was such that some members of the examination board mentioned that the revision was good for Japanese applicants in that questions were shorter and clearer, meanings were articulated, medical terms were accompanied by English translations, and less-technical expressions were used in the examination.¹⁰

However, government-led revision is a serious thing. The passing ratio does not necessarily mean that the government has changed its position to welcome foreign workers, which signifies that the government had to make revisions in order to maintain its EPAs with counterpart countries.

5.1 The Associate *Kaigofukushishi* Problem

In 2007, the MHLW announced the establishment of the title of Associate Certified Care Worker, which was attributable to the school courses for Certified Care Workers under the EPA. A school course that followed the Japanese curriculum was prepared as part of the partnership with the Philippines. School-course candidates do not have to take the national examination, as is the case for Japanese candidates; this contrasts with the work track, in which passage of an examination is required after 3 years of working experience. However,

with the change in the Certified Social Workers and Certified Care Workers Act, the obligation to take an examination was imposed on school-course students. This standardized examination is similar to that for care work (a more-specialized occupation). Because candidates still had to take exams even after this course, the government created the position of Associate Certified Care Worker so that there would be no contradiction with the EPA with the Philippines. Within Japan, this system was criticized for being geared toward the EPA; critics charged that certificates should not be given to those who had failed examinations. The Filipino government strongly opposed it as well, saying that unification of the exam system had not been part of the negotiations and that the intent was to prioritize Filipinos below Japanese Certified Care Workers rather than to establish a safety net. In 2011, the Filipino government suspended recruitment through this school course. However, because exam unification was not enforced as expected in 2012, and because the school track was suspended, no one was adversely affected by this change.

6 DESKILLING

The *Kaigofukushishi* work track is the main channel by which care workers are received from abroad under the EPA. Under this track, candidates need 3 years of working experience in order to take the examination to become Certified Care Workers.¹¹ However, as mentioned elsewhere, because only working experience obtained in Japan is

¹⁰Interview with members of examination committee, 2011.

¹¹This pattern of results holds without regard to nationality.

counted, all foreign candidates have to train for 3 years regardless of prior experience.

Many Certified Care Worker candidates are nurses in their countries of origin because of the absence of skill qualifications that are equivalent to those for *Kaig-ofukushishi*. Another reason is that nurses who have below the required 2–3 years' working experience have no choice but to apply as Certified Care Worker candidates. Nurses who apply as Certified Care Worker candidates are also required to perform an additional 3 years of care work practice in Japan to obtain examination candidacy.

This implies the following points from the viewpoint of the efficient utilization of human resources. First, deskilling is occurring: nurses become Certified Care Worker candidates in Japan because they cannot perform any nursing in Japan. Although deskilling is often used in the sense that a profession is replaced by new technology, deskilling here means that a skill is not utilized because of the lack of opportunity or skills recognition in international migration. This also means that the number of nurses from both the sending and receiving countries declines as a result of international migration, which entails a loss of human

capital. Furthermore, their long absence from the practice of nursing may deteriorate the nurses' skills when they return to hospitals. Even though the Japanese government states that EPA worker transfers may contribute to the development of human resources, this will tend to waste the skills of nurses from sending countries. Figure 4 shows that newly graduated nursing graduates become Certified Care Worker candidates. Only 26 out of 108 candidates who arrived in 2008 remained in Japan as of June 2012; this signifies that during their stay in Japan, they engaged in care work. Furthermore, considering that the passing ratio on the national licensure examination for care workers is merely 30 percent, of whom 30 percent returned to their home countries within 3 months of passing the examination, this nurse circulation indeed seems to have resulted in deskilling.

The case of EPA care-worker candidates from Indonesia also signifies an important aspect of human resources. Because there is no equivalent qualification for care work in Indonesia, both governments decided not only to admit nurses as candidates but also to admit those who had received the care training designated by the Japanese

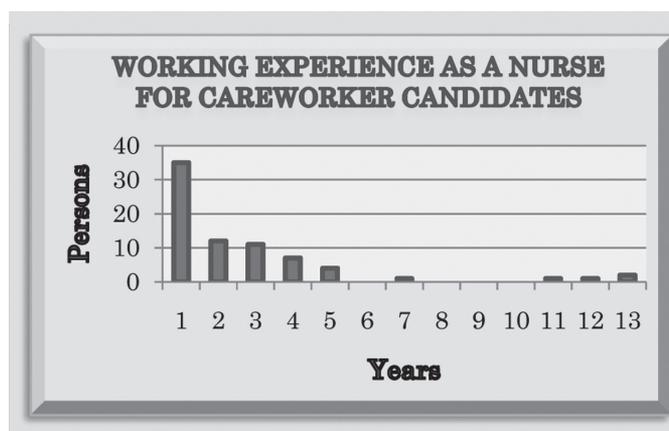


Figure 4: Working experience as a nurse for care worker candidates.

government. In other words, the concept of care as tailored by the Japanese government was introduced to facilitate the EPA from the second batch in 2009. However, this was not successful because those who received the training were not necessarily successful as candidates. The Indonesian government asked the Japanese government to take responsibility for those failed applicants who finished the care-training course. Because the care-training program was developed for the purpose of the EPA, those who finished the course did not have any advantages in other foreign countries. This is just one example of deskilling because of the absence of mutual skills recognition.

6.1 Toward a Global Approach to Care Security

Harmonization of nursing- and care-work-related qualifications is quite significant in terms of human-resource utilization in Asia. Higher regional demand for care because of aging will trigger increased healthcare migration; this means that consideration of harmonization of qualifications should increase. Although Singapore and Taiwan have been accepting healthcare migrants since the 1980s and the 1990s, respectively, the absence of harmonization results in the deskilling of migrants, such as the employment of nurses as care workers or domestic workers. In other words, to meet labor demands, nurses are supplied to destination countries, which entails a loss of nurses in the sending countries. In Taiwan, nurses from abroad are accepted as care workers in institutions for older adults. Nurses from Indonesia, Vietnam, and the Philippines comprise 26.8%, 19.7%, and 44.7% of all institutional care workers in Taiwan, respectively¹² (Asato 2006). Those

countries accept nurses because of their own lack of care workers. Considering that the reverse-pyramid type of demographic structure takes several generations to stabilize, “care deficits” should be considered at the regional level. Labor migration is usually either unilateral or bilateral, according to simple supply and demand. Because demographic change is more than a bilateral issue, care deficits should be considered within a regional and global framework.

The current migration system is highly demand-driven, in that the receiving countries have decision-making authority over the sending countries. If the Philippines and Indonesia frequently cease sending migrants, either the receiving countries look for alternative countries or the sending countries start sending again without reaching favorable deals with the receiving countries. Therefore, even if many scholars favor migration as a medium for economic development, the current migration system results in brain drain and/or exploitation of human resources. Multilateral, regional, and global approaches to migration should be considered for increased sustainability.

The global approach is a framework characterized by a holistic approach to migration that emphasizes management, mutuality, and sustainability. Although the EU’s approach is famous, ideas on sustainability are carefully considered by the WHO and the International Council of Nursing. The EU’s approach with partner countries, especially Arab, African, and Asian countries, is to manage undocumented workers and asylum seekers with regard for rights awareness, information provision, protection from human trafficking, and information sharing with partner regions and countries. The EU’s code of practice articulates the

¹²Preliminary questionnaire of 51 institutions in Taiwan, conducted in 2005 (Asato 2006).

importance of the sustainability of international recruitment, the development of a domestic health workforce, and mutuality of benefit, as well as other factors. Regional action should be taken in developed countries where aging is taking place and high demand for nurses and care workers exists.

CONCLUSION

EPA acceptance of health workers has been politicized from the beginning of the negotiations. However, the process of negotiation was also a process of harmonization between nursing and care work. EPAs provide the first chance to redefine these professions harmoniously with the corresponding definitions of nursing and care work. Harmonization of skills was not easy, particularly in terms of care

work, because of the absence of the concept in sending countries. Harmonization in care work is currently more elaborative than that in nursing. Nevertheless, harmonization has not generated progress in the care-work field: candidacy for the national exam is not recognized, work experience is not recognized, and EPA candidates' work within Japan is not counted as defined within Long-Term Care Insurance, which necessitates additional cost for employers.

In terms of nursing, even though mutual skills recognition does not exist (as is the case in many countries), candidacy for the national exam was accepted in the EPAs. A unique aspect in Japan is the revision of the language in the examination, including the addition of terminology in English and the use of simplified, clear Japanese. However, this is intended to increase the passing ratio by reducing the language barrier, because

Table 2: Chronological table.

1987	Certified Social Workers and Certified Care Workers Act enacted
2000	Long-term care insurance started
2002	Free Trade Agreement negotiations with the Philippines began
2004	Interministerial coordination started for smooth negotiations
2004	Some deregulation of nursing and care work under the Special Districts for Structural Reform program
2006	Immigration Ordinance revised; duration of stay for foreign RNs raised from 4 to 7 years
2007	MHLW announced the establishment of the Associate Certified Care Worker title
2007	Law revised to reflect new care needs, such as care for dementia under long-term care insurance
2008	Arrival of EPA candidates from Indonesia
2009	Arrival of EPA candidates from the Philippines Tailored care program implemented in Indonesia
2010	Cabinet decides to include medical care, such as suction, FGT, and gastric fistula, and to revise the national exam in special consideration of the EPA End of tailored care program in Indonesia
2010	Duration of stay limits for non-Japanese RNs abolished
2010	Number of foreign nurses holding Japanese RN certification increased rapidly
2011	The Philippine government stopped educational tracking of certified care worker candidates
2012	Cabinet decides to revise national exams; medical care such as suction, FGT, and gastric fistula begins

the success of trade liberalization under EPAs is measured by passing ratios.

If the exam-passing ratio remains low, then the EPA becomes a driver of acceptance of non-licensed workers, which in turn reflects a framework of unskilled labor migration. Even though acceptance of “unskilled workers” is not allowed under current law, there are some channels for receiving unskilled workers who are trainees, Japanese descendants, and spouses; many scholars have observed that this constitutes a double standard within Japanese immigration policy. To avoid contradiction and to make EPAs successful, it is necessary to produce a high passing ratio.

This is another aspect of the uniqueness of the EPA migration policy. Migration policy is often deeply related to labor policy; however, EPAs began against the will of the MHLW, which considers there to be no supply-demand gap. Therefore, EPA worker transfers became more politicized, and passing ratios became benchmarks of success for entire EPAs.

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State and Medicalization of Care Needs: Migrant Care Labor Policy in Taiwan

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ABSTRACT

This essay argues that the importation of migrant care labor cannot be understood as only a labor policy in response to either labor shortages or the particular interests of capitalism. Through an examination of the prerequisites for families to hire live-in migrant care workers in Taiwan, this essay elucidates the gendered role of the state by demonstrating how it implements policy and regulations to achieve governance. The state aggressively manages migrant labor to further its specific interests and justify its political agenda, using migrant care labor to rationalize its withdrawal from the provision of public care. The Taiwanese case illustrates the connections between the state's policies on migrant labor and care in the context of neoliberal ideology.

KEY WORDS

Labor migration, Care worker, State

1 INTRODUCTION

The Barthel Index is a medical measure that has been used by the Taiwanese state

since 2000 to evaluate the care needs of prospective care recipients and determine their qualification to employ live-in migrant care workers; the measure came into use for this purpose 8 years after the initial importation of migrant care workers. In past years, the suitability of the Barthel Index for the assessment of a family's qualifications for hiring live-in migrant care workers has been debated from time to time. In addition, the Barthel Index score needed for acquiring such qualification has been revised several times. In September 2012, the government responded to the public critique of qualification standards for the employment of migrant care workers by loosening the Barthel Index restriction for adults aged >80 years. However, the Barthel Index still plays an essential role in the hiring of live-in migrant care workers. In this essay, I discuss how the Taiwanese state incorporates the Barthel Index into its migrant-care labor policy to justify its withdrawal from care provision and simultaneously reinforce the care responsibility shouldered by individual families.

Using the example of the employment of live-in migrant care workers in Taiwan,¹

¹The resources for the writing of this essay are mainly derived from my doctoral research, conducted from October 2007 to December 2009.

this essay argues that the importation of migrant care labor cannot be understood only as a labor policy in response to either the discourse of labor shortage or the particular interests of capitalism.² Instead, this essay emphasizes the gendered role of the state through a demonstration of how its implementation of policy and regulations are directed toward its goal of ruling. The state aggressively manages migrant labor both to further its specific interests and to justify its political agenda: it utilizes migrant care labor to rationalize its withdrawal from the provision of public care. The Taiwanese case illustrates the dynamics and complexity of the gendered ideology embedded in the state's practices.

This essay is organized as follows. First, I outline the political–social context of labor migration in Taiwan to situate live-in migrant care workers in the overall structural fabric of the nation, paying particular attention to the significant needs of and unique situations confronted by the country's aging society. Second, within the context of a neoliberal economy, I discuss the role of the state in two issues—migrant labor policy and public care provision—to reveal the gendered nature of the state itself. Third, I illustrate the politics of care needs, which is situated in the state's management of migrant labor and its construction of needs-talk, in order to show the connections between these two issues. In the following section, I draft a procedure for the implementation of medical assessment to show how the process of medicalizing care needs is manipulated by the state. To conclude this essay, I further emphasize the gendered nature of the state by revealing its attitude toward care.

2 CONTEXT: MIGRANT CARE WORKERS IN TAIWAN

Taiwan crossed the threshold for consideration as an aging society in 1993, when its population of older adults reached 7 percent of the total population. By 2010, the population ratio of older adults had grown to 10.74 percent (Executive Yuan 2011), and this figure is projected to increase to 14 percent by 2017 (Executive Yuan 2010). Compared with those of Western societies, the pace of aging in Taiwan is extremely rapid. For example, France will need 115 years to raise its older adult population from 7 percent to 14 percent, while Taiwan will require only 24 years to reach the same level. This increase will result not only in demand for medical resources but also in the need for long-term care provision.

Rather than institutionalized care, most Taiwanese people prefer live-in and community-care models; especially, the majority of older adults choose to live with their sons (Academia Sinica 2004). This preference might be explained by the influence of Confucian culture and filial piety within Chinese families (Zhan & Montgomery 2003). Because of the patriarchal system, the parents invest more financial and educational resources in their sons than their daughters; thus, they also expect more rewards from their sons in their later years, including living together. Informal care provided by family members (mostly women) is the main resource of long-term care in Taiwan (Wu 2005). However, a change in predominant family type from extended to nuclear and the recent increase in women's labor participation

²Neoclassical market theory holds that the importation of migrant labor reflects an imbalance in supply and demand, whereas Neo-Marxism contends that migrant workers are mobilized as a "reserve army of labor" for exploitation.

have resulted in deficits in this informal pool of care laborers and a need for new solutions.

Since 1992, in order to accommodate demographic necessities—including the increase in the number of double-salary families and the “graying” of the population in Taiwan as fertility rates decline and people live longer—the Taiwanese government has allowed the immigration of domestic workers and care workers as part of a short-term contract labor force to shoulder the responsibilities of caring for older adults, people with disabilities, the sick, and younger children. Migrant care workers have become a major resource for formal long-term care labor in Taiwan since this importation began.

Although the Taiwanese government applies the so-called “Rule of Limited Amount” to regulate the importation of migrant labor, the number of migrant workers has grown rapidly in the past decade, from 248,357 in 1997 to 425,600 in 2011, and the number of migrant care workers has increased almost six-fold, from 26,233 in 1997 to 195,726 in 2011. Currently, care workers comprise almost half of all the migrant workers in Taiwan.

Unlike the other care-labor-receiving countries in Asia (e.g., Singapore and Hong Kong, whose importation of live-in migrant workers is determined by market demand), the Taiwanese government uses medical assessment as the mechanism for defining individuals’ care needs and regulating migrant care labor. Families hoping to employ live-in migrant care workers must undergo a medical assessment that measures the recipient’s care needs and meet state-stipulated qualifications in order to hire. The details of such assessment, including its development and regulation, are described in a later section.

3 GENDERING THE STATE: UNPACKING THE GENDERED NATURE OF THE STATE AS A GOVERNING BODY

Feminist theories of the state disclose the gendered ideology embedded in the practices of the state, which is ignored by mainstream state theory. Mackinnon (1982, 1983), a feminist pioneer, proclaimed that “feminism has no theory of the state” to draw scholarly attention to gendered analysis of state practices. Mackinnon argues that discussions about citizenship, property, personal rights, and legal systems (from either liberal or Marxist–state-theory standpoints) typically regard the state as a neutral and ungendered collection of policies independent of social context (Connell 1990). The Marxist tradition approaches the state as an agency that serves the interests of a specific class and simultaneously excludes gender relations from its analytic framework. However, a growing body of scholarship focusing on socialist feminist analysis extends the class conflicts proposed by Marxists to delineate the connections between patriarchy and an oppressive class system. Scholars note that the state not only acts as an arbitrator of class interests but also mediates the cooperation between capitalism and patriarchy. In their view, patriarchy is defined as “a serviceable term for historically produced situations in gender relations where[by] men’s domination is institutionalized” (Connell 1990, 514) rather than simply as male prejudice. The gendered nature of the state is thus embedded in regulatory processes and power practices rather than any state mistreatment of women or exclusion of them from state structure. A gendered state is represented not as an abstract, macro-level entity with stable power; instead,

it embodies a complex array of institutional practices and processes whereby it exercises sovereignty but also confronts negotiation and resistance according to a gendered representation.

Neoliberalism, which influences the economic strategies adopted by various states, advocates minimizing the role of the state in order to maximize economic growth. It argues that both labor-market deregulation and the retrenchment of social-welfare programs facilitate economic development. In an article written by Misra, Woodring, and Merz (2006), the authors discuss neoliberalism as the push-and-pull forces for care in labor-sending and -receiving countries, respectively. In this section, I first show the gendered nature of the state by illustrating how the state uses women's labor in general, and care labor specifically, to achieve its particular interests in the context of the neoliberal economy. Then, I discuss how the state privatizes care in order to rationalize its withdrawal from public care provision. This discussion demonstrates that this state policy has different consequences for the lives of women and men and embeds gendered ideology within the policy itself.

Recent research on female migrant care workers and domestic workers demonstrates the importance of the nation-state in facilitating and coordinating labor migration. These studies draw attention to the dimensions of gendered interactions between state and migrant workers (e.g., Cheng 1996, 2003; Chin 1998; Huang and Yeoh 1996; Tyner 1999, 2000; Oishi 2005). State migrant-labor policies not only differentially shape male and female workers' experiences but also reveal the gender politics embodied in the processes of regulation and control over workers. Research conducted in labor-receiving countries has demonstrated that the state acts as a

social agent by protecting migrant workers (Cheng 1996); however, its sovereignty and policies regulate, manage, and discipline workers as well (Cheng 2003; Huang and Yeoh 1996; Silvey 2004).

The state's gendered nature is revealed in the feminization of labor migration, which is currently a distinguishing characteristic thereof (Castle and Miller 2003). Compared with that in other regions, the feminization of labor migration has been especially salient in Asia. The number of migrant Asian women has increased significantly since the late 1970s; the majority are temporary migrant contract workers who travel from one Asian country to another (Oishi 2005). Asia is now not only a supplier of female migrant laborers but also a major destination for those same laborers. This phenomenon is framed within the concept of global patriarchal capitalism, in which a gendered system and global capital work simultaneously to exploit women's labor, particularly that of women located in the Third World. Women working in offshore production zones are commoditized as "nimble workers" by nation-states to serve the interests of capitalists within the global capital system (Sassen 1984; Ong 1987; Salzinger 2004). The incorporation of women's labor into capitalist expansion has been associated with local patriarchal systems and gendered ideology that not only confines women to reproductive labor but also devalues their status in the spheres of both production and reproduction. Mohanty (1997) further elucidates the gendered and racialized ideologies that legitimize the capitalist exploitation of Third-World women to increase states' profitability.

Recent research on female migrant workers in transnational contexts has elucidated the specific gendered and racialized politics of labor that legitimize the

exploitation of Third-World women in order to maximize the accumulation of transnational capital and satisfy the needs of nation-states and privileged groups. In the past three decades, Third-World women have become a new commodity, sold by their home countries as an economic-development strategy. They are purchased by host societies to resolve labor shortages in low-paid service industries, such as domestic work, caregiving, entertainment, and the sex trade in emerging global cities (Sassen 1991).

Although neoliberal strategies do not entirely destroy social-welfare programs in wealthier states, they encourage states to seek out market-based solutions in care provision (Morgan 2002). These states consciously curtail their expenditures on social spending, cut social care services, and simultaneously promote the marketization of care to create a system through which individuals purchase the labor they can afford. As a result, there is a need for low-wage private-sector services.

The Taiwanese state allows the importation of migrant care workers, which responds to the deficit of care labor resulting from its demographic and societal changes, including the growth of the aged population, declining fertility rate, change in family living arrangements, and increased rate of women's labor participation. Furthermore, the government confines migrant care workers (a specific group of women) to a segregated labor market, which ensures the availability of cheap labor to private households. The state imposes the responsibility of care on indi-

vidual families through marketization of care and simultaneously justifies its withdrawal from the provision of public care. As exemplified in the Taiwanese case, states with less-comprehensive social-welfare programs tend to employ more migrant care workers (Parrenas 2001).

4 THE POLITICS OF MIGRANT CARE LABOR POLICY

Migrant care labor policy in Taiwan cannot be understood as only labor policy: it also involves the needs-talk constructed by the government to legitimize the importation of migrant care workers and its regulation of employment. However, the multiple facets of migrant labor policy (such as protection of local workers' rights and attitude toward migrant workers) still influence how the government frames and implements its migrant-care-labor policy. Therefore, in this section, I first introduce the general migrant labor policy in Taiwan. Then, I discuss the needs-talk produced by the government both to rationalize the importation of live-in migrant care labor and to justify the privatization of care.

4.1 Migrant Labor Policy

In Taiwan, the Council of Labor Affairs is in charge of migrant labor issues at the central-government level, while local labor bureaus are responsible for implementing policy and regulations. The main labor immigration policy consists of the *Employment Service Act*³ and *Regulations on the Permission and Administration of the Employment of Foreign*

³This was legislated in 1992 and revised multiple times in past decades. Chapter 5 of the Act on *The Recruitment and Supervision of Foreign Person* defines the relevant principles of the employment of foreigners (including both white-collar and working-class migrants).

*Workers.*⁴ The government divides working-class migrants and white-collar foreigners into two different categories. Working-class migrants are identified as the “second type” of foreigner, different from the “first type,” which is comprised by white-collar and professional foreigners. The two groups of people fall under the purview of different legal regulations, and governmental attitudes toward these two groups of foreigners are different, as reflected in the former Premier’s response to the legislation of the *Employment Service Act*:

After listening to the briefing on the *Employment Service Act*, the Premier Executive Yuan instructed the Council of Labor Affairs that the evaluation of applications for foreign employment should follow the principle of protecting nationals’ working rights. The evaluation standards for blue-collar workers shall be strict, while they shall kept loose for white-collar workers, such as lawyers, accountants, and high-tech technicians, according to the mutually beneficial principle. (Lianhe newspaper 07/28/1992)

The government has repeatedly stated that its goal is to protect economic development and nationals’ working rights. This official position is clearly addressed in the *Employment Service Act*:

To protect nationals’ right to work,
the employment of foreign persons

shall not jeopardize nationals’ job opportunities/working conditions, national economic development, or social stability. (*Employment Service Act*, Article 42)

The statement exposes a hierarchal priority in this order: national benefits, locals’ rights, and finally, those of migrant workers.

The Taiwanese government applies the rule of “Limited Amount, Limited Industries” to regulate the importation of migrant workers. They are allowed to be hired only in the following sectors: construction, manufacturing, fishing, care services, and domestic work. These occupations have been abandoned by local workers, as they are identified as the three Ds—Difficult, Dirty, and Dangerous. This rule prevents migrant workers from taking employment opportunities away from nationals and simultaneously places migrant workers in a segregated labor market. The secluded occupations for migrant workers are regarded as a discarded and worthless zone of employment characterized by work that this particular group—with fewer skills and less value—deserves.

Government officials emphasize the temporary status of migrant workers, who are perceived as a supplement to instead of a substitution for local labor. The government views migrant workers as objects that serve the state’s interests, not as human beings. The former Director of the Council of Labor Affairs explains how the state benefits from the migrant labor policy:

⁴*Regulations on the Permission and Administration of the Employment of Foreign Workers* was promulgated on January 13, 2004. The previous regulation on the topic was called *Regulation on Employment and Management of Foreign Workers*, promulgated in 1992. Chapter 3 of the *Regulations* details the recruitment, importation, and management of migrant workers.

In response to the unbalanced labor force, the importation of migrant workers has occurred in the context of limited choices. The importation of workers shall not result in problems of national security and permanent migration. Additionally, it should not affect the employment opportunities of local workers. The importation of migrant workers was not a permanent policy. It required the government to assess the effects regularly. Once the labor shortage was relieved, the migrant workers were to be repatriated immediately. (Lianhe newspaper 05/05/1992)

This discourse objectifies migrant workers and describes them as a tool used to satisfy Taiwanese society's needs and solve the problem of its labor shortage. The Taiwanese government does not honor migrant workers' human rights and does not guarantee them the same decent working conditions required under national labor law.

The general objectification of these workers predicts the particular objectification of migrant care workers. The Taiwanese government currently relies on migrant care workers to accommodate the increasing number of aging people in the country. The government regards migrant care workers as a remedy for the gaps in the public care system:

With the economic development of society, few [native] people were willing to work as long-term care workers. These jobs refer to work, such as feeding and bathing, that requires less medical professional knowledge. The numbers of workers imported depended on the demands in the labor market ... [The former

director of the Council of Labor Affairs] argued that [importation of migrant care workers] was [a valid] part of the social-welfare system. (Lianhe newspaper 08/27/1991)

In contrast to the strict quota system used to regulate the importation of domestic workers, the Taiwanese government has gradually lowered the employment standards for live-in migrant care workers over recent years. The Taiwanese government has enacted bilateral agreements with sending states to facilitate the international flow of labor. The government uses migrant care workers not only as a tool to remediate state policy goals on public care but also to reinforce the process of privatizing care work. The nation-state creates a gendered and racialized, low-wage labor market for migrant care workers in order to guarantee their availability for private households and medical institutions. However, the privatization of care work and the ideology of importing care workers does not alleviate the burden on families with disabled, older, or ill members: low-income families cannot afford even inexpensive care labor and thus do not benefit from a gendered and racialized labor market. Rather, the policy creates and reinforces class inequalities in terms of access to and redistribution of resources and rationalizes the state's withdrawal from its responsibilities for the organization and provision of public care.

4.2 The Construction of Care Needs

In the Taiwanese case, the discourse of care needs has to be understood beyond the context of the nation-state to realize the state's political goals in terms of migrant-labor policy and administrative management. In addition, the need-talk must be situated in the specific social and cultural context whereby the state emphasizes family responsibility for care provision rather than the development

of public care. The need for care is no longer defined only as a personal or intimate issue in the modern nation-state; instead, these needs are constructed and manipulated by the political interests of the state.

By dint of professional knowledge, the Taiwanese state has been developing its technology of governance to manage the number of migrant workers needed; it has calculated formulas to estimate supply and demand for care and medicalized the needs of care through “scientific” indices and medical practices.

After the presidential election of 2000, the Taiwanese government—led by the new ruling party, the Democratic Progressive Party—announced its intention to reduce the number of migrant workers by 15,000 every year (i.e., 60,000 within 4 years). The reduction policy was specifically applied to workers in high-tech industries, public construction, and live-in care. The government argued on the premises of its migrant-labor policy that the importation of care workers had to consider the needs of long-term care recipients and greatly emphasized both local workers’ rights and the need for improvements in domestic employment. In order to achieve its main goal of controlling the number of migrant workers, the state proposed a quota system whereby limits for each industry were independently estimated and stipulated. According to the level of demand for care labor stipulated by the government, the goal was a reduction of 6,544 live-in care workers per year.

To calculate the maximum need for live-in migrant care workers, the government estimated the population with care needs and Taiwan’s overall institutionalized-care capacity. According to the *Ten-Year Project of Long-Term Care* proposed by the Ministry of Interior in 2007, the population with care needs is comprised by those who have disabilities requiring help with ADLs (Activities of Daily Life; including eating, mobility, indoor movement, dressing, bathing, and toilet movement) or IADLs (Instrumental Activities of Daily Life; including cooking, household chores, laundry, shopping, financial management, and outdoor movement). The estimations were conducted via various formulas.⁵ To estimate the population with care needs, the disability percentage was estimated via another governmental project, the *Third Year Project of Assessing Long-Term Care Needs*. These calculations of care needs provided “scientific” evidence for use by the government to develop (or dissolve) social welfare programs and distribute welfare resources. Such calculative practices allow the government to articulate its rationality, formulate a network of governance, and make administrative programs operable.

The quota system announced by the government symbolically confirms the state’s fundamental position toward migrant-labor policy rather than achieving any substantial goal.⁶ The number of migrant workers has risen from 326,515 in 2000 to 425,660 in 2011; in the same period, the number of

⁵The number of people with care needs is estimated according to the formula: $p \times d = x$ (p : total population or estimated population; d : disability percentage with ADLs and IADLs; x : estimated population with care needs/disabilities).

⁶The number of migrant workers declined from 326,515 in 2000 to 314,034 in 2004. However, the number of migrant care workers increased 98,508–128,223 in the same period.

migrant care workers has risen at a much higher rate (98,508–195,726) than the total population of migrant workers.

The state also proposed the incorporation of medical professionals into the standardization of care needs to legitimate the importation of migrant care labor. Since September 1, 2000, the government has stipulated that all applicants for live-in migrant care workers submit application forms along with the patient's score on the Barthel Index—a physical-function-oriented instrument developed to assess the level of functional independence/dependence in 10 ADLs primarily related to personal care and mobility in a clinical setting. All applications had to meet the criterion of scoring ≤ 20 points⁷ on the Barthel Index. The state acknowledged that instead of being designed to assess individual care needs, the policy was implemented in order to reduce the number of migrant care workers:

The Commission of Labor Affairs (CLA) indicated that, after setting up the criterion of the Barthel Index, at least seventy percent of the applications would fail to meet the requirements for employment. (United Daily News 2000)

The government estimated that the number of migrant care workers should

decrease every year to demonstrate its efficient administration and governance.

The Barthel Index acts to complicate the migrant care-labor policy in Taiwan: it both serves as the indicator of care needs that controls the employment of live-in migrant care workers and is used by the state to define care needs exclusively medically and to justify the privatization of care responsibility.

5 MEDICALIZING CARE NEEDS: THE PROCEDURES OF ASSESSMENT

To hire migrant care workers, families are required to undergo a medical assessment⁸ at a hospital and receive approval from the state. The applicant has to bring the care recipient and fill out a four-page application, which requires a certificate of diagnosis and disability, an appendix of specific symptoms and diseases, and the Barthel Index. The index consists of 10 ADL items⁹ that measure one's capability to live "independently." It is scored on a five-point scale to give a maximum total score of 100, which is equated with full independence; lesser scores are evaluated as different levels of "dependence."

Since September 2000, the Barthel Index has been the main tool used to measure the needs of care recipients. Even though the

⁷The scoring criteria have been revised several times in recent years.

⁸People with certificates of severe disability are not required to have the medical assessment. Their applications can be sent directly to the appropriate governmental department.

⁹The ten items are: feeding, moving (between wheelchair and bed), personal toileting needs, getting on and off the toilet, bathing, walking on a level surface, ascending and descending stairs, dressing/undressing, bowel control, and bladder control.

standard of assessment has been revised multiple times in recent years,¹⁰ the government still requires the Barthel Index as the major assessment tool for use by medical professionals. Current regulations require that a care recipient's Barthel Index score be ≤ 30 (or at least cannot exceed 35), and a need for 24-hour care must be approved by a medical assessment team composed of at least one physician and another professional (either a nurse or a social worker). The government emphasizes that the critical criterion for acquiring the qualification is the assessment of the need for 24-hour care. In other words, if the need for 24-hour care is not supported by the assessment, the care recipient is not qualified to receive live-in care, regardless of his/her Barthel Index score.

Physicians usually perform the medical assessment as an outpatient procedure, and a family member accompanies the care recipient through the assessment. Physicians are not likely to spend much time on the assessment because of their heavy workloads and busy schedules in outpatient services. Although the regulations stipulate that the assessment has to be conducted by a two-person team, one physician usually oversees the entire process and diagnosis, picking up a second person (usually another physician, a resident, or a nurse) at his/her convenience. The second person's opinion rarely counters that of the first (a physician) due to the hierarchal nature of hospital culture; even when the second person is also a physician, s/he is likely to agree with the diagnosis.

In addition to referring to any previous anamnesis provided by the care recipient, the physician depends on the family members to answer the questions listed on the Barthel Index if the care recipient is not able to respond by him/herself. Because of time-related and practical limitations, it is also difficult to ask the care recipient to perform each measured activity during the assessment. Thus, the method of assessment assumes that the family has a good understanding of the care recipient and is honest about the actual situation. In addition to interviewing the applicant, the physician might perform some simple physiological tests, especially ones related to mobility (including muscle power and joint function), in compliance with the Index. Instead of the Barthel Index, the Clinical Dementia Rating Scale (CDR) is applied to older adults with dementia. The CDR is rated on a five-point scale: 0 connotes no cognitive impairment, and the remaining four points (0.5, 1, 2, and 3) indicate various degrees of impairment. The CDR score needed to qualify for a migrant care worker is ≥ 1 or 2 points, with different scores corresponding to different standards of care.¹¹

After finishing the assessment process, the physician signs the form to indicate accountability. If the Barthel Index is used, the physician usually reports the total score. The second page of the application, the certificate of diagnosis and disability, includes the name of the hospital with which the physician is affiliated, the date of assessment, basic information on the care recipi-

¹⁰For example, in July 2001, the revised standard not only relaxed the Barthel Index score for qualification, but also indicated specific diseases (such as dementia) that were not measurable by the Barthel Index.

¹¹With a CDR score of ≥ 2 points, a patient needs approval by one physician who specializes in neurology or psychiatry. Those with CDR = 1 need approval from two.

ent (e.g., name, gender, age, date of birth, address, contact phone number, and medical record number), a description of health condition and diagnosis, the details of treatment, the prognosis, and doctor's advice. At the bottom is the "evaluation of care needs," which consists of two descriptions for qualified applicants: "needs 24-hour care" (with the choices of "yes," "no," and "unable to diagnose") and "The Barthel Index score is 0, and the patient's condition will not improve within 6 months."¹² If the physician checks off either one of these descriptions, the family qualifies. The whole application is then delivered to the second person, who is required to cosign. The application is processed through the hospital's administrative office (usually the social work department), which sends out copies (including the assessment results) to the local long-term care resource center; this center is then accountable for matching local care workers with applicants.

Since 2006, local long-term care resource centers have participated in the process of hiring live-in migrant care workers by matching local workers with employers. The government has stated that this mechanism was established to improve the local employment situation. After receiving applicants' documentation from the hospitals, the long-term care resource center calls the applicants to match them with local Taiwanese care workers or introduce them to local home-care resources. The applicants are allowed to refuse the matchmaking for reasonable reasons. After at least three matchmaking failures

with each attempt including three possible candidates, the long-term care resource centers send the applications to the Bureau of Employment and Vocational Training (which operates under the aegis of the Council of Labor Affairs). According to long-term-care-resource-center staff, the matchmaking success rate is extremely low. The applicants usually propose harsh working conditions in order to discourage local workers, compared with whom migrant workers not only provide cheaper labor but are also more easily manipulated.

This description of the medical-assessment procedures provides an understanding of how care needs have entered into medical jurisdiction rather than being perceived as an unavoidable, individual social issue. The medicalization of care offers it a particular legitimacy, upon which the state can distinguish medical care from the social care that should be rendered by the government.

CONCLUSION

The Taiwanese state systematically privatizes care work as a family responsibility through discourse characterized by a public-private split, the general promotion of family values, and the specific value of *san dai tong tang*¹³ (三代同堂; Hu 1995). According to the Civil Code, sons and daughters have an obligation to maintain their parents' care. The state only intervenes between these two parties when the former is incapable of providing the required maintenance. Therefore,

¹²If the patient's Barthel Index score is 0, and his/her condition will not improve within 6 months, s/he is qualified to hire two migrant care workers at the same time.

¹³Three generations living in the same household.

the state defines care as a private issue: it is expected to be solved within the family through either paid or unpaid labor.

This study aims to situate the importation of live-in migrant care workers in Taiwan within the context of the state's migrant labor policy and its interwoven attitude toward the provision of public care. By relying on the medical-assessment protocol, the state constructs a discourse of care needs and authorizes families' qualifications to hire live-in migrant care workers. The limited definition of "care needs" established by the state in its policy and then approved by medical professionals provides the state with the legitimacy to privatize care. The medicalization of care needs distinguishes household care responsibilities from the public care service rendered by the state. In other words, the medicalization of care needs legitimizes the state's withdrawal from the provision of care to the group of people whom it deems qualified to hire live-in migrant care workers and transfers this responsibility to individual families. At the same time, the families are obligated to attain approval during a medical assessment before making an offer of such employment. Because of the gender relations of care, care work is almost always performed by women rather than men when the state imposes the responsibility for it on private households. Migrant care-labor policy in Taiwan reflects the gendered nature of the state, which is embodied in the state's policies and regulations.

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Forming *Fictive Kin* in Fieldwork: An Experience of Reflexive Fieldwork with Japanese Women Marriage Migrants in Australia

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ABSTRACT

Amidst the broad discussions on reflexive fieldwork, the aim of this paper is to analyze the creation of a fictive kinship between the researcher and the respondent in fieldwork. Contesting the perception of the researcher as an objective analyst, recent debates about critical fieldwork have emphasized the dynamic interactions between the two actors in the field. In the long-term course of reflexive relationship building, both actors come to realize the different positionality between them. The researcher's intervention affects both the private and public spheres of the respondent and highlights the respondent's perceptions of self and social circumstances. To explore these issues, this paper details my own experience with the creation of fictive kinship in fieldwork. On the basis of my long-term fieldwork with Japanese women marriage migrants living in Australia, this paper discusses how the different positionality between us (i.e., the symbolic generational difference between a single, male researcher and a married woman) gradually led to the growth of fictive kinship. Finally, to highlight the rise of this symbolic relationship in reflexive fieldwork, I comment on the

ways in which the respondents reinterpret their social circumstances through the interactive experience.

KEY WORDS

Reflexive fieldwork, marriage migration, fictive kin, symbolic generational difference

1 INTRODUCTION

In fieldwork today, it is necessary for the researcher to be reflexive about his/her social and cultural positionality and its effects on the respondent (and his/her life world). Warren and Hackney (1993) explain the possible dynamic and ongoing relationship between the fieldworker and the respondent. Although the fieldworker may seek to develop or maintain a particular place in the client's mind, the respondent forms his/her own impressions, creating a place for the fieldworker. Furthermore, the place in which the fieldworker seeks or finds himself/herself changes occasionally and over time (Warren and Hackney 1993, 14). Instead of recording respondents' objective discourses and narratives, the fieldworker

should describe and analyze what he/she experienced in the process of reflexive fieldwork (England 1994; Mahoney 2008; Sultana 2007). In this fieldwork, the formation of a relationship between the respondent and the fieldworker provides the client with an opportunity to remold him/herself through ongoing interactions. Through the fieldworker's participation in the fieldwork, the respondents begin to consider who they are, while the fieldworker deals with the relationship in the context of the varied positionality of the people in the field.

The aim of this paper is to discuss the results of the reflexive fieldwork that comprises my research, including the generation of a symbolic relationship between a single, male, Japanese researcher in his 30s, and married Japanese women migrants living in Australia. In this fieldwork, the researcher is incorporated into the intimate sphere of the respondent once the initial contact between the two has occurred in the public sphere. In exploring the rise of fictive kinship (Warren and Hackney 1993) within the context of this symbolic, generational relationship between us, I envisage a particular sociocultural environment in which these Japanese women marriage migrants place the fieldworker into their lives.

My fieldwork in Sydney was conducted between July 2007 and September 2009. I mostly conducted my fieldwork in the western region of Sydney, although I occasionally performed research in other areas of the Greater Sydney region. Most of my informants were members of the Penrith Japanese Community (PJC), an ethnic association of local Japanese people living in the western Sydney region that was organized in late 2006. The number of members was around 30, and about 10–15 members regularly attend the meetings held every 2 weeks at St. Marys Community Centre

in the City of Penrith. Penrith is located approximately 50 km away from Sydney's city center on the westernmost fringe of Greater Sydney. Here, I conducted participant observation and in-depth interviews between November 2006 and September 2009. During my fieldwork with the PJC, I acted as the organization's secretary, taking minutes of its monthly general meetings and the biannual executive meetings. Apart from the PJC, I visited two other gatherings organized by local Japanese residents in the western Sydney region.

The respondents who were individually interviewed were generally selected from the general membership of the PJC. I conducted 35 interviews with 31 people between August 2007 and June 2008. Twenty-three out of 31 were "marriage migrants" (i.e., migrant women whose partner is an Australian living in Australia). Except for a few who visited the PJC from afar, most respondents were living in the Greater Sydney area. My respondents were 28 Japanese women and 3 Japanese men; this distribution of respondents was recruited because of the nature of the Japanese association and the residential distribution of Japanese people in the local area. Even so, I conducted several casual interviews with similar participants who live in other regions of Sydney for comparison. In some cases, interviews continued after the voice recorder was switched off. These follow-up conversations after the official interviews were transcribed as notes to accompany the interviews as soon as possible afterwards.

In my research, my respondents were by no means mere "informants"; instead, they are agents who make significant use of the opportunity to remold themselves. Interactions between the researcher and the respondent create the recognition that the respondent is regarded as an object of

analysis. Once they internalize this “objective” view of self, the fieldwork becomes a more reflexive space in which each side reevaluates, reinterprets, and remolds itself (Sultana, 2007). As the relationship mode changed, the expression of the symbolic generational difference between my respondents (married women with children) and me (single, male researcher) improved; such a symbolic generational difference was observed even though some of the respondents were as young as I. The results of my fieldwork reveal that these women play a certain social role in everyday life and that they reiteratively mold their social identity through practice.

2 JAPANESE MARRIAGE MIGRATION TO CONTEMPORARY AUSTRALIA

Australia is one of the most popular destinations for contemporary Japanese international migration (Hamano 2010; Mizukami 2006). As of 2006, the total Japanese population in Australia was 30,778; this had increased by 20.8% since the previous census in 2001. Interestingly, there is a striking gender imbalance in the data: there are 10,460 males (33.7%) and 20,410 females (66.3%) in the entire Japanese population residing in Australia. The largest age-gender cohort of Japanese females is aged 20–40 years. The Australian Department of Immigration and Citizenship recorded that people of Japanese origin comprised the largest group of spouse-visa applicants through marriage to an Australian during the last decade (Hamano 2012b). Among spouse-visa applicants, females vastly outnumber males.

These Japanese women were not permanent migrants upon initial arrival to Australia; my early research (Hamano 2012a) suggested that a high number of former temporary visa holders later became spouse-visa applicants in Australia. This implies not only that there are a large number of female applicants but also that a large number of Japanese spouse-visa applicants are “on-shore” applicants (i.e., those who became permanent migrants through marriage to a local partner after coming to Australia for other purposes, such as travel, study, and work visits). Among my 23 respondents who were marriage migrants, all except two were on-shore applicants.¹

The increase in the number of recent Japanese women marriage migrants affected the established Japanese community in Australia in various ways. First, because of the nature of cross-national marriage, these women tend to face difficulty with integration into the established Japanese community in Australia (Hamano 2013). Japanese “ethnoburbs” (Li 2009)—organic and inclusive ethnic suburbs in metropolitan areas—in Australia tend to be concentrated in middle-class suburbs fairly close to city centers (Mizukami 2006). However, these women have no choice regarding their residence, since they primarily followed their local partners, who are already engaged in particular jobs or even own property in other suburbs than Japanese ethnoburbs. Second, in Australia, it is getting more difficult for relatively young couples and families to own property in the city center due to the rise in real-estate prices (e.g., Allon 2008). Finally, the regional expansion

¹This number includes one woman who initially came to Australia on a working holiday, although she was thinking of marrying an Australian partner whom she met in Japan. In the interview, she said that she used this period to increase her confidence to immigrate to Australia through marriage.

of the Japanese population causes these Japanese women marriage migrants to share few common interests with other Japanese migrants across the region.

3 FROM GENDER DIFFERENCE TO FICTIVE KIN

Since I determined to work with Japanese women marriage migrants, the gender difference between us naturally came to the fore in the course of my research. When I started my fieldwork in Sydney, I was a single male research student in his early 30s. Meanwhile, the median age of my respondents was around the mid-30s, all of them were married, and most had a child (or children). The differences between us involved not only gender but also our social roles in terms of family relations in everyday life. Even outside of the fieldwork, whenever I submitted a paper or presented on my research, the most frequent question to me from the audience was how I dealt with the gender differences between the respondents and myself. Another common question was whether I could truly be involved in the women's community as a male outsider, even though we shared a common ethnic background. My respondents did frequently ask me whether I really understand what these women think in their lives in Australia. Further, they asked me as a male representative how much I sympathized with their thoughts on their husbands.

While the respondents in my fieldwork were likely to welcome me because of our common ethnic background, I frequently

perceived that the gender difference did have a distancing effect; for example, I sometimes heard from my respondents, "Oh, you may [not] understand what I say, because you are a man." Sometimes, in reference to their status of being married women and even mothers, they would start a conversation with me by making the following preliminary remarks: "I wonder it would be difficult for you to understand me because you're still a single man." In our relationship, marital and family status were important markers of difference.

More importantly, the gender difference among the individuals can be represented as a symbolic generational difference. Warren and Hackney explain "fictive kin" as follows:

[T]he roles into which the stranger is tentatively fitted can range from spy to adopted child or both as they change over time... [E]specially, young married women are often assigned the role of "fictive kin": adoptive daughter, child, brother, sister, or mother... The child role, with a married couple as "field father and mother," [has] also [been] characterized.

(Warren and Hackney 1993, 14)²

This fictive relationship between fieldworker and respondent are gendered and generationally hierarchized according to the sociocultural circumstances of the respondent in the field. In this sense, when fictive kinship occurs in the field, it does so within the mode of a particular and symbolic generational relationship.

²They stress that, in the course of fieldwork, a woman fieldworker can be recognized as a fictive daughter by the family (or the leader of the respondents). Nevertheless, as I detail through my own experience, fictive kinship can arise between a man fieldworker and his respondents.

Experiencing this symbolic generational relationship in fieldwork indicates how the fieldworker is essentially assessed and adopted by the respondent and his/her community. Additionally, this relationship serves as a vantage point from which the respondent expresses his/her dominant sociocultural identity in everyday life, revealed through long-term interaction with the researcher.

4 LESSONS FROM THE EXPERIENCE OF FICTIVE KINSHIP

Given that fieldwork entails the fieldworker throwing him/herself into the everyday life of the respondent, it is no wonder that the fieldworker is expected to play a certain role in the respondent's intimate sphere according to his/her positionality as a stranger (Goffman 1959, 11–12). However, the reciprocal performative rituals between the two at the initial stage will transform as their relationship proceeds. Then, the encounter in the public sphere moves into the intimate sphere of the respondent of long-term fieldwork. Accordingly, the creation process of fictive kin is the way in which the respondent involves the researcher into the sphere to which he/she belongs. In my fieldwork, I was recognized as a fieldworker who could possibly lead the respondents to the public sphere. However, Goffman acknowledges that the integrity of performance by each expected role is not always secured, and disruption could occur at each instance (Goffman 1959, 11–12). Even so, Goffman's amendment regarding the possibility of disruption of individual characteristics implies that everyone in society has to perform several roles according to the different relations, networks, and power structures

of everyday life. Accordingly, fieldwork is not only a place of encounter between two actors but also a space in which each participant envisages the structure of social relations that contributes toward the reflexive performance of certain roles.

I contacted the President of the Penrith Japanese Community (PJC), who is in her late 30s and has a child, and had a short conversation with her in a local pub in Penrith in November 2006. She complained that Japanese women marriage migrants receive little attention as a migrant group in this outer suburb (Penrith), even though they are unable to rely upon the major Japanese ethnoburb in north and central Sydney. She might have expected me, as a researcher, to make them "visible" or obtain more recognition in Australian society for them through my research and thesis. Most other members of the PJC cooperated with my research; they also expressed their interest in my findings, analysis, and arguments derived from my engagement with them. At this point, the gender difference between us had not yet been problematized in the course of fieldwork. Rather, they regarded me as a "researcher" (or stranger) who was presumably expected to mediate between them and the wider society. In other words, at the initial stage of my fieldwork, we recognized each other by reference to our common Japanese ethnic background rather than by considering gender. Particularly, because both of us were still "foreigners" (or ethnic minorities) in Australia, our concerns about the gender differences between us were replaced by cognitions regarding our common ethnic background (including its minority status in Australia). Rather, the respondents always referred to gendered social roles to identify the particular but transforming relationship between us.

A transformative relationship in reflexive fieldwork can be explained as one characterized by the transition of the research field from the public sphere to the intimate sphere belonging to the respondent. The changing roles of and relationship between the fieldworker and the respondent is accompanied by this shift in sphere. In the early stage of my fieldwork, I was recognized as and expected to be a researcher—a stranger who supposedly had the specific knowledge to interpret the goals of PJC leaders in the wider local community or society. My initial relationship with the leaders of the PJC was that they were *gatekeepers* (key informants) in my fieldwork. We then exchanged roles, because I, as a gatekeeper to the wider society, was expected to convey their interests to the wider public. Given that the researcher is thrown into the intimate sphere of the respondent, the fieldworker—as either an audience or player—inevitably maintains and reforms the social world of the respondent. As such, the researcher is involved in the complicated role of performing with the respondent in his/her field.

Now, I examine the process by which the fieldworker (myself) became involved in the respondents' intimate sphere through the remolding and reconstitution of gender roles and social identities within their everyday life in Australia. This process is characterized as the rise of fictive kin, with an emphasis on symbolic generational difference. In my case, as our relationship progressed and I succeeded in developing a certain level of credibility, the relationship between the respondents and me became framed as that between mother and son, a frame in which they are most comfortable expressing their identity in their intimate sphere in Australia.

To detail the growth of this unique relationship between my respondents and me, I now describe the ways in which I conducted my fieldwork. After several meetings with the leaders of the PJC, I began to take part in their regular meetings. At each meeting, I introduced myself to those women whom I was meeting for the first time. My standard introduction was that I was a research student at a local university and that I was participating in the PJC for my research about Japanese women migrants living in the outer suburbs of Greater Sydney. As I have discussed elsewhere (e.g., Hamano 2011), distance from the city center is positively related to gender imbalance among the Japanese population. Accordingly, apart from weekends and school holiday picnics for families, I was the only male participant in the regular meetings during my long-term fieldwork. Additionally, I was the only participant in the meetings who was not living as part of a family in Australia (in fact, I lived with housemates in Australia), while all regular members of the PJC were living in the surrounding suburbs with their partners or family members. We were much different with regard to our social characteristics, such as occupation, gender, generation, and family duties; nevertheless, we shared a common ethnicity and geographic area of residence.

Under these unique circumstances, my credibility or rapport seemingly improved until I commenced in-depth interviews with the members of the PJC. Most of the respondents were already familiar with me prior to the interviews, as I had attended regular meetings of the PJC for a long period and had had several casual conversations with them. Further, I had previously spoken to them about the eventual possibility of conducting individual

interviews with them. When I conducted the first interview with a respondent, almost 10 months had passed since I had met her at the PJC. Individual interviews were frequently conducted at the participants' homes, because this provided the most convenient scheduling for them. I also wanted to conduct the interviews in a familiar environment. I was partly interested in the intimate sphere they construct and wanted to listen to them function within it. Our interviews were conducted casually on the couch in the living room or at the kitchen table.

Even though I planned for the interviews to last around 1 hour to avoid interference with their daily duties, the interviews actually tended to be longer, except when babies began to cry (this was the most common cause of interview interruption). However, before I switched on my digital recorder for the interview, we usually had a very casual conversation and talked about how each of us had been getting along recently. We often kept talking even after I had switched off the recorder and stated that the "official" interview had ended. In turn, many of them would ask me questions about my private life. They seemed to be curious about me as a stranger (a single, male, Japanese researcher living in Australia). Particularly, my status as a research student was a curiosity for them, and it was not easy to explain my ambivalent position as neither very student-like nor an independent researcher. Hence, they frequently asked me why I did not have any coursework, even though I was a university student (as they were unfamiliar with the concept of a post-graduate research student); when exactly I would graduate and go back to Japan; or whether I would remain in Australia upon graduation. Furthermore, they were curious about my future job prospects after the

completion of this "research" (not "study"). Moreover, after they found out about my partner in Japan, they asked me how and with what frequency I kept in touch with her at such a great distance. Some of them even directly asked me when I would get married to her, and they often said they felt sorry for her. They said that, as women, they had sympathy for my partner, who was living by herself in Japan. From their perspective, it seemed as if I were a selfish villain who had left his partner in Japan in order to do what I liked in Australia. These women used to say that they sided with my partner in Japan.

These counter-questions to me became frequent after the official interviews, and the women sometimes arranged a meal for me or cooked lunch (I did not carry out any interviews at night or early morning because of their homemaking and child-care duties during those periods). In any case, they asked me what I usually cook and eat in Australia, and they sometimes worried that my diet was not healthy enough, imagining the life of a single, male student living by himself overseas. Mostly, I appreciated their offers, and we had lunch, tea, or coffee together until they had to leave home to pick up their children at school or run errands. In other cases, they prepared a lunch box or a meal pack for me when we had interviews at public places, such as a food court at a shopping center or a local café. They remarked that they worried about my unhealthy lifestyle as a single, male student when they passed the lunch box or meal to me after the interview.

There were a few opportunities whereby respondents offered me the chance to stay at their homes for a night after I travelled long hours to visit them on the fringes of Sydney's western suburbs. These were significant opportunities for me to conduct

participant observations of Japanese women and their families and have conversations with their husbands, in-laws, and children. At such times, I had more time to talk about my personal background, research interests, family, partner, and future prospects. Their unforgettable and warm kindness to me and their perception of me in my fieldwork reminds me that our gender difference (female/male) developed according to a certain symbolic generational relationship (mother/son) based on their familiar gender role of female caregiver. Even though some of them were almost as young—or even younger—than I was, these Japanese women marriage migrants repeatedly performed and represented themselves as if they were Japanese mothers. Nevertheless, it can be argued that this particular relationship was realized between these women and me in my fieldwork, considering how important it was for them to refer to those gendered accounts in the process of remolding and situating themselves in Australia.

Further, I was involved in the politics of mothering, as I was expected to play a certain male role with them. First, in contrast to the suggestion of Warren and Hackney (1993, 18–19), this fictional kinship involved me as a single, male researcher. Their example was that of a single, female anthropologist who could achieve a good relationship with older informants by being recognized as their daughter. However, my understanding of the emergence of this fictive kinship among us should be scrutinized as a way in which the respondent strives to remold and situate the self in his/her new sociocultural circumstances, relying upon established gendered accounts and roles in everyday life. Rather than a simple granting of entry into their field, which possibly occurs with

any fieldworker, my experiences represent the peculiar mother-son relationship that exists in Japanese culture (Kondo 1990). This reflects how Japanese migrant women depend on these gendered accounts and the concomitant social roles in search of the best lifestyle for their migratory experience in Australia (Hamano 2011a).

Nevertheless, I argue that the respondents' projection of a fictive kin relationship onto me, which occasionally took place after I had individual interviews with them, reveals their ambivalence in the course of remolding themselves as migrant women in Australia. Glenn (1994, 16–17) critiques the ideological aspect of the discourse on mothering that assumes that mothering is a “natural sense,” but she also discusses the politics of mothering as the dialectic process of struggle to remold oneself in a certain power structure of social relations. Given that the practice of mothering is shaped by the political struggle of women in social circumstances involving unequal power relations, it is necessary to view this social practice in a new light (Glenn 1994). Glenn stated that “it is important to look at the other side of the coin, focusing not just [at] the way women are opposed as mothers but [at] the way they act to assert their own standards of mothering and to attain [the few] resource[s] necessary to sustain their children's lives” (Glenn 1994, 18).

Thus, the fictive kinship between the respondents and me can be explained in light of these Japanese women's identity politics (i.e., the expression of their ambivalent remolding of the self as migrant women; Hamano 2011b). Not only does the fictive-kin relationship involve the researcher into the intimate sphere of the respondent, but it also reveals the respondents' social practice whereby they self-identify within a certain sociocultural structure. In the

Japanese context, Rosbenberger (2001, 44–46) observes the ways in which Japanese women rely upon the identity politics of mothering in order to garner power within their families. Hence, on the one hand, the mothering shown to fictive kin in fieldwork is a passive result of their limited access to social resources in their migratory life in Australia. The execution of long-term fieldwork enabled me to consider the socio-cultural structure where these Japanese migrant women were situated. Further, because we shared long-term relationships through the development of fictive kinship between us, I may have been involved these women's process of remolding or situating their new selves via gendered accounts. My fieldwork experience in Sydney's western suburbs provides crucial evidence that fieldwork is a relational experience between the fieldworker and the respondent, transforming a field researcher in the public sphere to fictive kin in the respondent's intimate sphere throughout the course of a long-term relationship.

5 CONCLUSION

According to Willis (2000), the reflexive mode of fieldwork emphasizes “the importance of maintaining a sense of the investigator's history, subjectivity, and theoretical positioning as vital for the understanding of and respect for those under study.” More importantly, it leads to “direct engagement and interaction with subjects [that] can hope to produce, somehow, a ‘picture of reality’” (Willis 2000, 113). Not only my interviews and participant observations but my long-term relationships with them in fieldwork revealed how much these Japanese women strive to find the best lifestyles and methods to remold

themselves in Australia. In this context, in addition to the gender structure in the field, the researcher needs to consider the gendered generational differences between fieldworker and respondent, such as fictive kinship. However, contrary to remarks frequently made about my fieldwork, I insist that such unsettled relationships do not necessarily impede fieldwork. As Clifford (1988) argued, given that each fieldwork (or ethnography) study can reveal only partial truths regarding overarching fields, the fieldworker can improve the interactive process to one including *thick description* (Geertz 2000 [1973]) of the same field (or with the same respondents) by taking part in the respondents' intimate sphere.

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“Asian Family Values” in East Asian Societies: A Comparative Study

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1 INTRODUCTION

Global interest in East Asian societies, including those of Korea, Japan, China, and Taiwan, is increasing.¹ Among the Northeast Asian countries, Japan experienced modernization and established itself as a developed country relatively earlier than Korea and Taiwan, which modernized later and underwent industrialization, economic growth, and democratization during the late 20th century. Among the Southeast Asian countries, Singapore has already established itself as a developed nation, while Malaysia continues to achieve rapid economic growth, following behind Korea and Taiwan. Moreover, China became an economic world superpower after the 1980s.

World interest focused on East Asian societies after both Northeast and Southeast Asian countries industrialized rapidly and acquired high levels of economic growth and power. Modernization in East Asia was the most successful case among non-Western nations, as its progress did not

follow the industrial and modern paradigms of the United States and Western Europe exactly; therefore, many became eager to comprehend East Asia's success. As scholars began to examine the industrial policies and background of Asian economic growth, they became interested in the cultural background of East Asian societies and realized that the East Asian institution of family (which was based on Confucianism) had unique attributes. As a result, Western scholars interested in East Asian societies began to enhance their understanding of East Asia by furthering their studies of the East Asian family and the unique sociocultural components linked to that concept.

One development resulting from increased interest in East Asian societies is the term “Asian values” (Patten 1996; Dupont 1996). This term was developed in studies by Western and East Asian scholars and political figures such as former Prime Minister of Singapore Lee Kuan Yew (Barr 2000; Zakaria 1994). Prime Minister Lee Kuan Yew did not use the term “Confucian

¹It is generally understood that East Asia is composed of the countries of both Northeast Asia (particularly Korea, Japan, China, and Taiwan) and Southeast Asia (Singapore, the Philippines, Thailand, Malaysia, Vietnam, Indonesia, etc.).

values”); instead, he spoke of the term Asian values quite freely.² At the time, however, many arguments concerning Asian values presupposed that Confucianism was a distinct characteristic of East Asian culture.³

Prior to the Asian economic crisis of the late 1990s,⁴ Asian values were a popular topic of debate. Western followers of Weber believed that the level of modernization achieved in Europe was impossible to replicate in East Asian societies. Such scholars were skeptical of the argument that Confucianism was the cultural foundation of East Asia’s modernization.⁵ However, some East Asian and Western scholars and politicians began to argue that East Asia’s high level of industrial and economic growth was made possible by distinct Asian values. Henceforth, Asian values became a hot topic of debate.⁶

Although discourse on Asian values has not been as prevalent in the 21st century, the fact that dialogue concerning Asian values has continued at all reveals that the value system of Southeast and Northeast Asian societies has aspects that have not been discovered elsewhere. Although this value system may have negative qualities that validate the logically precarious

subordination of the individual to the collective society, repression of individual creativity and dignity, or rationally justification of the rule of dictators and dominant groups, the debate assumes that an Asian value system exists as part of a culture founded upon the “Confucian family.”

Even for scholars on family studies, the debate on Asian values is an important topic of research. Scholars on East Asia, including Korean and general sociologists, contrast on whether or not to perceive Asian societal characteristics of Confucian values or Asian values as positive or negative qualities (Dupont 1996; Kim 1997; Patten 1996; Pye 2000; Robinson 1996). However, there is a common understanding that East Asian families have distinct characteristics that differ from those in other societies and a system of family values that is starkly different from those in other societies.

Then, what characteristics do Asian family values have? Simply speaking, Asian family values are still conservative and traditional (Eun 2006). Why and how can we say this? This study is a trial to understand the traditional character of Asian family values.

²Kim (1994) fiercely criticized Lee Kuan Yew’s wrong “Asian values” concept in that it legitimized authoritarian rule in many Asian societies, including Singapore and Korea.

³Kim (2002) argued that “Asian values” are very vague and irrelevant. Thus, he proposed to use “Confucian values” rather than “Asian values.”

⁴Lim (1998) and Poon and Perry (1999) described the 1997 Asian economic crisis.

⁵Krugman already argued that Asian development was based on maximization of input factors, not productivity increases, thus the development in Asia was on the verge of collapse (Krugman 1994).

⁶Oakes (2000: 673) argues that “Asian values” is a kind of civilizational discourse. However, Oakes also indicates that this is an elite ideology and value set combined with neo-Confucianism to protect local culture or Chineseness.

As societies in the West transformed from traditional to modern and then postmodern, there was also a change from traditional to modern to postmodern values (Glass et al., 1986; Inglehart 1990, 1997; Inglehart and Baker 2000; Inglehart and Norris 2003; Inglehart and Welzel 2005; Thornton 1989). Moreover, the sort of value change experienced by Western societies is also expected in non-Western societies that undergo modernization. This understanding has led East Asian social scientists, including those from Korea, to develop similar preconceptions. For example, Korean scholars have studied and analyzed value changes in Korea, discovering that individualism and the modern value system is pervasive in East Asian societies as well (e.g., Kim 1992; Yim 1986).

However, this framework of analysis cannot be applied to families in East Asia. Externally, families in Korea, Japan, Taiwan, and other East Asian countries seem completely different from those in the traditional era. Nevertheless, the expectations of the family; the principles that constitute the family; the expected roles of family members; the relationships between spouses, parents, and children; the societally ingrained gender roles; the institutionalized social norm of marriage; the negative perceptions of cohabitation; and other factors indicate that traditional family values still hold in today's postmodern East Asian society (Ochiai 2011). Several changes are taking place rapidly outside the boundaries of the family system. However, families and the system of family values persist in their conservative, traditional forms, particularly in Korea (Eun 2006). The family is one aspect that distinguishes East Asian societies from other ones (Yi 2007). As do Western scholars, East Asian scholars acknowledge that family is an important

aspect that differentiates East Asian societies from other societies.

Then, what is the origin of the distinction between East Asian and other societies? This study argues that the principal aspect that distinguishes East Asian families from those in other societies is family values. East Asian families are believed to differ from others because the concepts, roles, and expectations of family and the values and attitudes in many family types contrast between East Asian and other cultures.

Nevertheless, there is no clear explanation of East Asian family values, primarily because studies on family values have been derived predominantly from Western academia: attempts to measure East Asian values through experimental applications of Western frameworks and methodologies are believed to have been unsuccessful.

This study argues that there are Asian values that have shaped the unique form of East Asian families. When using the term Asian values in this paper, we refer to Asian family values. Thus, are there indeed unique Asian family values? Can unique Asian family values be discovered in the Asian societies of Northeast Asia (Korea, Japan, and Taiwan) and Southeast Asia (Singapore, Malaysia, Vietnam, Thailand, and Indonesia), and if so, what is their constitution? Are Asian family values fundamentally different from those of other societies? This study begins by raising these types of questions.

Unfortunately, this study cannot provide clear solutions to all of the problems presented above. This study consists of research on family values that is both scientific and quantitative, and it defines family values as the values of the family, including attitudes toward gender roles. On the bases of social survey data derived primarily

from Northeast Asian societies (i.e., Korea, Japan, China, and Taiwan), this study aims to develop a new debate on Asian family values by first analyzing family values in East Asia and then examining whether or not such family values are shared among East Asian societies. The results of this research may have shortcomings, since this study proposes a new argument that considers both the analytical and methodological aspects of Asian family values. On the bases of these novel data, however, this study may hopefully provide an opportunity to step beyond the conventional definition of Asian family values and reveal cultural homogeneity regarding them.

Although this study argues that there exist certain Asian family values, it does not imply that the same family values can be found across all Asian societies; on the contrary, both the differences and similarities between the family values of various East Asian societies are of interest. Each East Asian nation underwent a different path towards industrialization and modernization in the 19th–20th centuries. These societies have also undergone value changes during this long period. In addition, each society's traditions and culture are unique, an aspect that is deeply reflected in each society's value system.

Moreover, the pace of change in values differs between generations within each society. Although postmodern values prevail in the so-called postmodern nations of Western societies, differences in family values among generations still persist in both the East and the West (Eun 2006). If the generational gap of family values is large, a society's value system can become

polarized (DiMaggio et al. 1996). The severity of polarization of family values in Korea has been found to be less than that in Japan, as seen later in this research; this indicates the possibility that the pace of change in family values varies among East Asian societies. In other words, the heterogeneous aspects of values across and within East Asian societies require as much attention as their homogenous aspects. In other words, although Korea, Japan, and Taiwan are located in close proximity to each other in Northeast Asia, it is important to remember that differences as well as similarities exist among these societies.

2 DATA AND METHODOLOGY

The source of the data used in this research, the East Asian Social Survey 2006, was conducted by the Organization for East Asian Social Survey, which is composed of social scientists from Korea, Japan, Taiwan, and China.⁷ Recently social scientists in East Asia (including Korea) have conducted social surveys actively. Particularly, the General Social Survey (GSS), developed by the National Opinion Research Center at the University of Chicago, has been not limited to the United States but adopted as a global social survey. The Japanese version of this social survey is named the Japanese General Social Survey (JGSS). In Taiwan, Academia Sinica implements a social survey that assesses characteristics resembling those assessed by the GSS, which is known as the Social Change Survey. In Korea, the Survey Research Center at Sungkyunkwan University established the Korean General Social Survey in 2003.

⁷Refer to the following website for more information on EASS: http://www.eassda.org/modules/doc/index.php?doc=greet&__M_ID=19.

It was a coincidence that many East Asian countries began to conduct social surveys based on the American GSS around the same period; nevertheless, this coincidence contributed greatly towards the explanation of individual values, behavior, and attitudes in each East Asian society, including Korea, Japan, and Taiwan.

Yet, as social scientists began to conduct various GSS implementations throughout different East Asian societies, they found that the questions provided by the American GSS had some limitations. The questions designed in the American GSS, World Values Survey, and other leading social surveys contained questions based on Western cultural standards. One could argue that these survey questions universally measure societal attitudes, values, and behaviors, but as these questions were designed and constructed against a background of Western culture, they are best suited for the measurement of individual attitudes, values, and behaviors in Western societies. When these questions were applied in social surveys in East Asian societies, some of them effectively measured the attitudes, values, and behaviors of individuals in modern East Asian societies, but some were inappropriate for the context of modern East Asian societies. Social scientists were mainly disappointed with the fact that it was difficult for the survey questions to detect prospectively the unique attitudes, behaviors, and values that exist only in East Asian societies. For example, although the family is a social institution that exists in all societies, its mode of existence is distinguishable among different societies. Many believe that East Asian societies are different from others, but there is no clear, general-

ized explanation that can explain this specific difference. Therefore, social scientists who study and conduct social surveys in East Asian societies began to search for a new framework of social surveys that can identify both the unique aspects of East Asian societies and the universal qualities shared between East Asian societies and other ones. In order to achieve this, East Asian social scientists gathered to begin a survey research organization known as the Organization for East Asian Social Survey.

The Organization for East Asian Social Survey conducted its first social survey in 2006 and decided that family would be the first common survey topic among the four societies of Korea, Japan, Taiwan, and China. A unique set of questions was developed to define the characteristics of East Asian families, and a combination of specialized and general questions concerning families led to the creation of the family module. In 2006, a version of the GSS that included this family module was conducted in Korea, Japan, Taiwan, and China simultaneously; results from this social survey constitute the family module data of the East Asian Social Survey 2006 that are used in this study.⁸

The East Asian Social Survey 2006 family module is composed of items from different fields concerning family, one of the most important of which is family values. Family values refer to the attitudes and values that an individual holds towards marriage, cohabitation, divorce, gender roles, and other subjects related to family. In order to increase one's understanding of a society's families, one must understand the characteristics of families in societies through individuals' perceptions of the different forces

⁸In this study, I deal with data from Japan, Korea, and Taiwan, excluding mainland China.

that shape and preserve families. Individual values regarding family are diverse throughout societies. The question of whether or not families are formed by the marital union of two individuals can measure an aspect of attitudes towards marriage; there may be societies in which individuals hold the perceptions both that one must get married and that marriage is unnecessary. Moreover, societies might exist wherein some individuals believe that marriage is not the only institution that verifies families and that cohabitation without marriage is also acceptable. Attitudes towards many of these topics concerning families must be very diverse.

Until now, family characteristics and change were studied in East Asian societies using survey questions on various topics, such as marriage, cohabitation, divorce, gender roles, sexual experiences, and parent-child relationships. Most of these questions were originally designed to understand the transformation of the concept of family in Western societies; however, their success in identifying the unique characteristics that distinguish East Asian families from those in other societies is doubtful.

As a result, the family module from the East Asian Social Survey 2006 includes certain questions derived from the GSS that were believed to be useful for the study of East Asian families. In addition, it also includes questions newly developed to identify the unique characteristics of family values in East Asian societies.

The following are the survey questions concerning family values included in the East Asian Social Survey 2006 to identify family values in East Asian societies.

1. The husband should be older than the wife.
2. It is not necessary to have children in marriage.
3. Married men are generally happier than unmarried men.
4. Married women are generally happier than unmarried women.
5. It is alright for a couple to live together without intending to get married.
6. People who want to divorce must wait until their children are grown up.
7. Divorce is usually the best solution when a couple cannot seem to resolve the problems in their marriage.
8. It is more important for a wife to help her husband's career than to pursue her own career.
9. A husband's job is to earn money; a wife's job is to look after the home and family.
10. Men ought to do a larger share of household work than they do now.
11. During an economic recession, it is alright for women to be laid off prior to men.
12. The authority of the father in a family should be respected under any circumstances.
13. Children must make efforts to do things that would bring honor to their parents.
14. The eldest son should inherit a larger share of the property.
15. A child who has taken good care of his/her parents should inherit a larger share of the property.
16. To continue the family line, one must have at least one son.
17. If a husband's family and a wife's family need help at the same time, the married woman should help the husband's family first.
18. One must put one's family's well-being and interests before one's own.
19. Married men should provide economic support to their own parents.
20. Married women should provide economic support to their own parents.

21. Married men should provide economic support to their spouses' parents.
22. Married women should provide economic support to their spouses' parents.

The above survey questions include ones frequently used in GSS implementations to identify family values such as attitudes on marriage, divorce, and gender roles and ones developed specifically to identify Asian family values. Some other questions were developed to inquire about attitudes regarding intergenerational support. These questions were designed to examine whether or not married individuals believe that intergenerational support should be based on patriarchy. These questions were specially designed to measure particular Asian family values believed to serve as indices of patriarchal character. The questions were rated on a 7-point scale ranging from "strongly agree" to "strongly disagree."

These questions comprise inquiries into the following topics: obedience towards or acceptance of the authority of elders, husband's superiority over the wife in spousal relationships, the belief that a man should be older than his wife to protect the authority of the man, and the tradition of strong familism. Further, these questions assess whether family well-being comes before individual well-being, whether family traditions based on patriarchy endure, whether there should be a son in the family, and whether property inheritance is thought to be centered on the eldest son. Using the survey questions thought to represent the unique features of family values of East Asian societies, this study examines whether or not Asian family values truly exist in East Asian societies, including Korea, Japan, and Taiwan.

How can we detect and explain the existence of Asian family values using survey questions? If Asian family values exist within East Asian societies, we must be able to distinguish the unique features of family values from other general attributes of family values in Korea, Japan, and Taiwan. The family module of the East Asian Social Survey 2006 includes various questions on family values, as mentioned before. These survey questions are comprised by a combination of general survey questions concerning general family values derived from GSS implementations in Western societies and questions newly designed to discern Asian family values in particular. In this survey, many intercorrelated questions were developed to distinguish the some common characteristics of family values. This research employs principal component analysis to detect some common characteristics of Asian family values. Principal component analysis can be applied to measure statistically which of a group of questions measure that specific content when multiple questions test a specific type of content. Each question in the above survey can be a statistical variable; however, the contents measured by these variables are not mutually exclusive; therefore, they consist of various forms of a given variable. Thus, the number of variables designed and included exceeds the number needed to measure the same contents. We may identify which variables are used to measure similar contents and group them into components by using principal component analysis.

The exact details of Asian family values are currently unknown. We merely understand that the researchers who designed and conducted the East Asian Social Survey 2006 developed and included unique questions thought to explain Asian family

values in order to identify those same Asian family values. Yet, all of these questions must undergo heavy scrutiny in order to be regarded as measuring Asian family values.

On the other hand, these questions shared certain similarities among individuals in East Asia, and if they are intercorrelated in their measurement of specific contents, we need to discuss the contents these questions represent. In addition, we need to consider whether or not the concept of Asian family values exists through an examination of which family values they represent on the whole. Finally, if Asian family values exist, we need to discuss what contents can be identified as Asian family values.

3 ASIAN FAMILY VALUES ANALYSIS 1: ANALYSIS OF POOLED DATA FROM THREE SOCIETIES

In this section, the data from the East Asian Social Survey 2006 will be pooled and analyzed to determine whether certain family values can truly be called Asian family values. The purposes of this analysis are to determine whether common Asian family values exist in this institution, and if

so, to determine which common family values exist. In this part of the study, pooled data across the three societies are analyzed to distinguish common Asian family values among East Asian societies prior to individual analysis of each society.

After pooling the data from Korea, Japan, and Taiwan, principal component analysis is implemented on the family-values-related questions from this dataset. Orthogonal varimax rotation analysis, which assumes no correlations between components, was used for the principal component analysis, and component extraction was limited to those with eigenvalues of ≥ 1 . In addition, to interpret the rotation results, the assignment of variables to components was restricted to those with factor loadings of ≥ 0.4 . The following components and the variables for each component were extracted from the principal component analysis.

Four variables were extracted in component 1, which satisfies Hatcher's first condition that at least three variables be present. In addition, all four questions measure attitudes held by married adults regarding the provision of economic support to their parents and those of their spouse. Moreover, this component had low correlations with the other components. The value of

Table 1: Component 1 of family values in three East Asian societies.

Variable	Value of rotated component (=correlation between component and each variable)	Cronbach's alpha value of standardized variable
Married men should provide economic support to their own parents	0.78	0.865
Married women should provide economic support to their own parents	0.85	
Married men should provide economic support to their spouses' parents	0.87	
Married women should provide economic support to their spouses' parents	0.84	

the rotated component is high; thus, the component extraction seems to satisfy the principle of principal component analysis. Further, the internal consistency of this factor, which uses four questions to measure attitudes held by adults towards the provision of economic support to their parents and those of their spouse, is high. Since the internal consistency of this component is high, we may conclude that this measure’s reliability is also high (Cronbach’s alpha value = 0.865).

The second component extracted from the results of principal component analysis is the following.

Component 2 is composed of five variables, and it also satisfies the standards proposed by Hatcher: it consists of at least three questions, and they have low factor loadings onto other components. Consid-

ering the measurement of common content reliability between the five variables, the obtained Cronbach’s alpha value of 0.69 is barely different from the average statistical standard of 0.7. Therefore, we conclude that these five variables have high reliability for the measurement of a specific content.

The following is the third extracted component from the results of principal component analysis.

Component 3 measures attitudes towards marriage. These two questions were developed and included in the survey to distinguish attitudes towards marriage by gender. This component has only two variables that measure attitudes towards marriage and is thus unable to satisfy Hatcher’s requirement that at least three variables comprise a component. From this perspective, it is difficult to argue that

Table 2: Component 2 of family values in three East Asian societies.

Variable	Value of rotated component (≡ correlation between component and each variable)	Cronbach’s alpha value of standardized variable
The husband should be older than the wife	0.57	0.69
The authority of the father in a family should be respected under any circumstances	0.67	
Children must make efforts to do things that would bring honor to their parents	0.74	
If the husband’s family and the wife’s family need help at the same time, a married woman should help the husband’s family first	0.58	
One must put one’s family’s well-being and interests before one’s own	0.67	

Table 3: Component 3 of family values in three East Asian societies.

Variable	Value of rotated component (≡ correlation between component and each variable)	Cronbach’s alpha value of standardized variable
Married men are generally happier than unmarried men	0.90	0.837
Married women are generally happier than unmarried women	0.90	

this is a valid component, since it comprises only two questions that differentiate between male and female attitudes towards marriage.

The following is the fourth component extracted from principal component analysis.

Having three variables as a component, component 4 satisfies Hatcher’s standard. The factor loading onto component 4 is high for each of its constituent variables, but the value for the rotated component is low. However, the essential construct expressed by the three questions is unclear. The outcome indicating that “People who want to divorce must wait until after their children grow up” implies the guaranteed well-being of the child, since it enables children to live with both parents. This question concerns parent-child relationships (i.e., how the interests of the child are regarded when making decisions about divorce). On the other hand, the two other questions measure aspects of family inheritance. Questions regarding which child should inherit a larger share of family inheritance asked whether the eldest son or the child who took the best care of his/her parents deserved a larger share. These scenarios are addressed in the latter two questions, indicating that the component is a measure of attitudes towards inheritance. Therefore, it is difficult to interpret

these questions as summarizing one specific content. Hatcher argues that even when several statistical conditions for the construction of a component are satisfied, it is still difficult to recognize them as a component if commonalities between the questions do not exist. When this standard is applied, component 4 can no longer be recognized as valid. Moreover, the measurement reliability (Cronbach’s alpha value) of -0.271 is much lower than the threshold value of 0.70 . Therefore, the reliability of the measurement cannot be accepted, and component 4 is not accepted as suitable.

Besides these components, component 5 includes the statements “Men ought to do a larger share of household work than they do now” and “During an economic recession, it is alright for women to be laid off prior to men,” and component 6 consists of three questions: “It is not necessary to have children in marriage,” “It is alright for a couple to live together without intending to get married,” and “Divorce is usually the best solution when a couple cannot seem to resolve the problems in their marriage.” As component 5 contains only two questions, it does not satisfy the conditions for consideration as a component. However, the questions both indicate gender relationships, and the component’s measurement reliability is high (Cronbach’s

Table 4: Component 4 of family values in three East Asian societies.

Variable	Value of rotated component (= correlation between component and each variable)	Cronbach’s alpha value of standardized variable
People who want to divorce must wait until their children are grown up	0.56	-0.271
The eldest son should inherit a larger share of the property	0.62	
A child who has taken good care of his/her parents should inherit a larger share of the property	-0.76	

alpha = 0.837). On the other hand, component 6 is comprised by three questions, but it is difficult to determine any common content between them, since the questions investigate attitudes on several matters: marriage, divorce, children, and cohabitation. In addition, the measurement reliability of this component is very low (Cronbach's alpha = -0.271). In other words, component 6 cannot be accepted as a valid component.

Using the pooled data from Korea, Japan, and Taiwan, a total of six components were extracted via principal component analysis. However, after considering the conditions necessary for consideration as a component, only component 1 (which encapsulates attitudes regarding the provision of economic support to parents) and component 2 (which summarizes what can be called Asian family values) were accepted. In this study, I hoped to find out whether there are values that can be called Asian family values, and if such values were found to exist, I hoped to determine their precise nature. The results of principal component analysis indicate that values common to Korean, Japanese, and Taiwanese individuals indeed exist in the form of five variables.

Then, what common contents can be proposed between these five variables in component 2? The first variable, "The husband should be older than the wife," implies that within marriage, men are more important or should have more authority than women. In addition, there is a sense that men should possess more power than women should. The second item, "The authority of the father in a family should be respected under any circumstances," represents the view that family members must obey the father in absolute terms as the head of the family. In East Asian

societies, society as a whole is understood as an extension of the family; thus, the authority of the head of the family (i.e., the father) is absolute, and he must be obeyed under any circumstances. The third variable, "Children must make efforts to do things that would bring honor to their parents," is closely related to the second. It represents that father and child have a top-down (vertical) relationship, and the role of the child is not independent but one of duty to honor one's mother and father, who are above him/her. In other words, the child must respect paternal authority and make an effort to bring honor to his/her father. The other question involves the relationship between individual and family, which implies that in East Asian societies, the well-being of the individual is less important than that of the family (i.e., that the pursuit of individual well-being is not a priority). The last of the five questions demonstrates patriarchic regard for the family by saying that when a woman marries, her husband's new family is more important than her biological one.

These five questions appear to comprise one component and thus measure common content. Then, what can we call the common content of these five questions, and how can we interpret its meaning? I propose that these five questions be considered as the main components of Asian family values held by individuals living in Korea, Japan, and Taiwan. I propose that component 2, which was extracted from the results of principal component analysis, includes the following family values held by individuals in Korea, Japan, and Taiwan: husbands are higher than wives in the hierarchy of marriage and family life, the husband's authority should be accepted, the authority of the father as the head of the family should be unconditionally accepted and all

family members must respect his authority, the child's role in parent-child relationships is to bring honor to the head of the family, self-sacrifice is necessary for family well-being instead of individual well-being, and women are compelled by patriarchy to leave their biological families to become members of their husbands' newly formed families after marriage. One may conclude that the common content between these five questions represents so-called Asian family values.

If these five questions assess the definite variables that comprise Asian family values, then an *Index of Asian Family Values* may be constructed on the bases of these questions.

Index 1 of Asian Family Values = sum of values of five variables/5

Following the above index calculation, we may measure each individual society's Index of Asian Family Values and the mean of each rank value.

As shown in Table 5, Taiwan has stronger Asian family values than Korea and Japan. According to their levels of the Index 1 of Asian Family Values, we may arrange the societies by strength of Asian family values in order from strongest to weakest: Taiwan > Korea > Japan. The difference between the Index of Asian family Values in Taiwan and Korea is a mere 0.2. However, the corresponding difference between the index in Japan and Taiwan is 0.9, and the difference between the Index in Korea and Japan is 0.7. Using the Index 1 of Asian Family Values, we can argue that the Taiwanese and Korean societies have relatively stronger Asian family values than Japan.

Which aspects of family values make Korea and Taiwan more "Asian" than Japan? Figure 1 shows the mean family values scores shown in Table 5.

The perception that children should make efforts to honor their parents is stronger among Taiwanese people than among Koreans and Japanese people. In addition, the understanding of the concept of family well-being and the priority of the family to individuals are relatively stronger among Taiwanese people than among the other nationalities. The attitude that the authority of the father should be respected under all circumstances is slightly weaker in Taiwan than in Korea but has persisted strongly overall. The attitude that husbands should be relatively older than wives indicates the strong androcentric perception that husbands should have relatively more power than their wives in couple relationships. The weakest of the outlooks concerns the attitude that married women should prioritize their husbands' families above their biological ones. Koreans have slightly lower levels of most of these attitudes than Taiwanese people but a slightly stronger perception of the unconditional authority of the father.

On the other hand, Japanese people show weaker Asian family values than Taiwanese and Korean people. In other words, Japanese people have Asian family values similar to those of the Korean and Taiwanese people, but the measurements of the five variables comprising Asian family values show lower levels in Japan than in Korea or Taiwan. Further, compared with Korean and Taiwanese people, Japanese people are more individualistic, less receptive of paternal authority, and less receptive of the idea that children need to make an effort to bring honor to their fathers.

These results indicate that despite various levels of Asian family values, all three societies indeed show specific family values that can be called Asian

Table 5: Index 1 of Asian Family Values and the mean score of each variable pooled across three societies.

Index and rank variables	Korea	Japan	Taiwan
Index 1 of Asian Family Values	5.0(0.9)	4.3(0.8)	5.2(0.9)
Older Husband than wife	4.5(1.5)	4.0(1.0)	4.8(1.5)
Father’s authority	5.6(1.3)	4.7(1.2)	5.5(1.4)
Children’s efforts	5.2(1.4)	4.4(1.3)	5.8(1.2)
Husband’s family first	4.1(1.6)	4.0(1.1)	4.3(1.5)
Family well-being first	5.4(1.3)	4.7(1.1)	5.6(1.4)

Note: () Standard Deviation

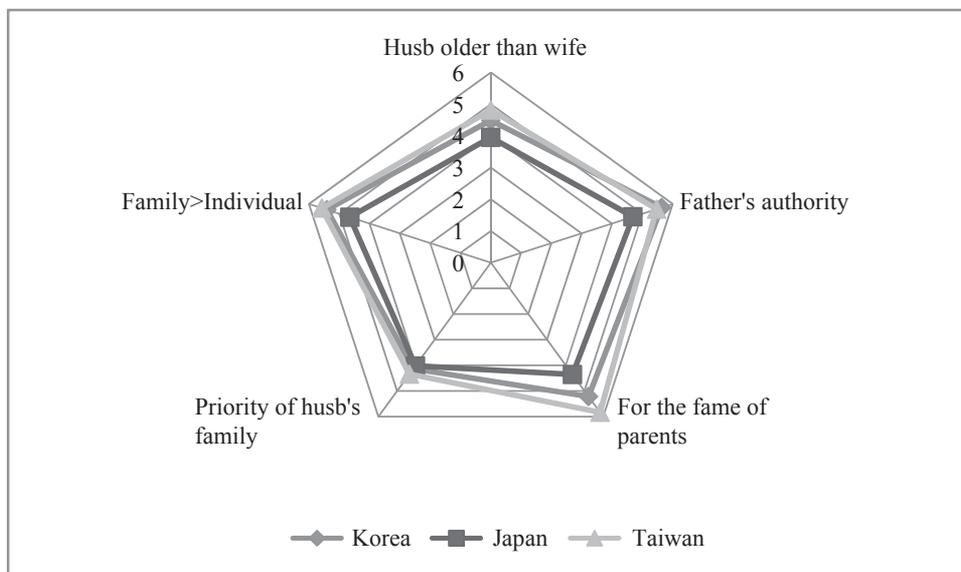


Figure 1: Mean scores of common variables included in Index 1 of Asian Family Values from Korea, Japan, and Taiwan.

family values, which attach importance to male dominance, patriarchy, and age hierarchy.

**4 ASIAN FAMILY VALUES
ANALYSIS 2: INDIVIDUAL DATA
ANALYSIS OF KOREA, JAPAN,
AND TAIWAN**

The data from three societies—Korea, Japan, and Taiwan—were analyzed indi-

vidually in this section to see if a component called Asian family values could be found. In addition, we examined whether or not the items of this extracted component included a common content.

The components were extracted through principal component analysis of the individual data from Korea, Japan, and Taiwan. The results of the analyses of individual societies also revealed common attitudes among married adults regarding the provision of economic support to

parents and the parents of one's spouse. Questions designed to understand inter-generational support can be grouped into questions concerning married adults' attitudes towards the provision of economic support to one's parents and those of one's spouse.

Next, common contents were extracted from the separate analyses of data from Korea, Japan, and Taiwan to comprise so-called Asian family values. The following are the questions (i.e., variables) that were included in each individual society's component of Asian family values.

In separate analyses of data from Korea, Japan, and Taiwan, differences in the numbers and contents of the variables included in this component are observed. This component is comprised by seven variables in both Korea and Taiwan; six are shared, while one differs between the two societies. Japan shares five variables with Korea and Taiwan; however, the Japanese component does not contain one variable

shared by the components of both Korea and Taiwan.

This result shows that Asian family values appear to be very similar between the Korean and Taiwanese societies. Namely, so-called traditional gender relations, which include the ideas of men having more authority than women in marital relationships, women valuing their husbands' families more than their own, and men having primary roles in society while women provide supporting roles, are included in this construct. In addition, the idea that having a son is necessary for family succession is included in the Asian family values of Korea and Taiwan. On the other hand, the importance of the eldest son as the heir of family property was only included in Asian family values for Koreans, while the importance of paternal authority in families was only included in the Asian family values of Taiwanese people.

Similar to the cases of Korea and Taiwan, Asian family values in Japan are

Table 6: Variables included in Component 2 of family values through principal component analysis of data from Korea, Japan, and Taiwan.

Variable	Korea	Japan	Taiwan
The husband should be older than the wife	*	*	*
It is more important for a wife to help her husband's career than to pursue her own career	*	*	*
A husband's job is to earn money; a wife's job is to look after the home and family	*	*	*
During an economic recession, it is alright for women to be laid off prior to men	*	*	*
The authority of the father in a family should be respected under any circumstances	—	—	*
The eldest son should inherit a larger share of the property	*	—	—
To continue the family line, one must have at least one son	*	—	*
If a husband's family and a wife's family need help at the same time, the married woman should help the husband's family first	*	*	*

Note: *signifies that the variable was included in the indicated component

comprised by variables that indicate patriarchal perceptions towards family, including the ideas of men having more authority than women in marital relationships, husbands having a primary role while wives have supporting roles in gender relations, and married women regarding their husbands’ families as more important than their own biological families. However, unlike the cases of Korea and Taiwan, the importance of the eldest son, the prerequisite of having a son for family succession, and the authority of the father are not included in Japan’s component of Asian family values.

Table 7 presents the rotated component values and Cronbach’s alpha values, the latter of which represents the reliability of the variables included in the Asian family values component.

The results listed in Table 7 indicate that the correlations between this component and the variables included in the Asian family values of each society are

very high. Furthermore, when the component of Asian family values is comprised by these variables, the measurement reliability is also very high.

The factor composition of Asian family values is very similar between Korea and Taiwan. The difference in factor composition of Asian family values between Korea and Taiwan indicates an explanation as to why Koreans, unlike people in other societies, have strong expectations regarding the eldest son’s role and a diminishing sense of paternal authority in families. Japan’s early experience of modernization and its cultural context may explain why fewer factors comprise Asian family values in Japanese society than in those of Korea and Japan. For instance, the importance of and expectations on the eldest son in Japan do not appear to be as strong as those in Korea and Taiwan, and paternal authority may have weakened as a result of modernization. The societal values in Korea and Taiwan regarding the power relationships between

Table 7: Rotated values of the variables included in the Asian Family Values component (≡ correlation between the component and each variable) and Cronbach’s alpha values in separate analyses.

Variable	Korea	Japan	Taiwan
The husband should be older than the wife	0.59	0.62	0.42
It is more important for a wife to help her husband’s career than to pursue her own career	0.66	0.77	0.72
A husband’s job is to earn money; a wife’s job is to look after the home and family	0.73	0.75	0.78
During an economic recession, it is alright for women to be laid off prior to men	0.67	0.70	0.58
The authority of the father in a family should be respected under any circumstances	–	–	0.54
The eldest son should inherit a larger share of the property	0.64	–	–
To continue the family line, one must have at least one son	0.63	–	0.64
If a husband’s family and a wife’s family need help at the same time, the married woman should help the husband’s family first	0.67	0.57	0.63
Cronbach’s alpha value	0.804	0.754	0.754

husbands and wives and the gender roles of husbands and wives in families contrast with those of modern Western societies and today's modern or postmodern family values: the husband earns money while the wife gives up her career to take care of her family and husband, a son is considered a prerequisite for family succession, the family is given priority over the individual, and there are patriarchal perceptions towards family.

Asian family values exist in Korea, Japan, and Taiwan, but the factors that comprise the concept differ slightly between those societies. Nevertheless, as shown in Table 6, five variables in the components of Asian family values are shared by Korea, Taiwan, and Japan. Thus, in this section, Index 2 of East Asian Family Values was generated by choosing the five common variables between the Asian family values components of Korea, Taiwan, and Japan.

$$\begin{aligned} & \text{Index 2 of East Asian Family Values of Korea, Taiwan, and Japan} \\ & = (\text{Older husband than wife} + \text{Husband's career first} + \text{Traditional gender role} \\ & \quad + \text{Lay off women first} + \text{Husband's family first})^9/5 \end{aligned}$$

This index represents the average of the values of the variables commonly included in the Asian family values components of Korea, Taiwan, and Japan in separate analyses. The Index 2 of East Asian Family Values B is presented in Table 8.

Index 2 of Asian Family Values, presented in the above table, is the mean of the common variables in the three societies' Asian family values components. Values of this index and each variable reflect that the levels of Asian family values in the three studied East Asian societies are

nearly the same. Without examining statistical significance, we can arrange the societies in order of strong to weak Asian family values: Taiwan (4.2) > Korea (4.0) > Japan (3.9).

There are slight differences in the mean scores of each variable between the societies. Figure 2 shows the differences in mean scores among the three societies.

As observed in the figure, Japanese society is less traditional than those of Korea and Taiwan in general. Specifically, Japanese people are less traditional than Korean and Taiwanese people in terms of the beliefs that husbands should be older than wives, women should assume a supporting role for the husband's career, and women should prioritize their husbands' families over their biological ones. On the other hand, Japanese people showed

a more traditional androcentric attitude than Koreans and Taiwanese people in terms of their attitude that women should be laid off before men. Among Taiwanese and Korean people, Taiwanese people have slightly more traditional attitudes in the five subfields than Koreans have.

Korea and Taiwan share one constituent variable of Asian family values that is not a constituent of the construct in Japan. As a result, Index 3 of Asian Family Values was designed to be applied only to Korean and Taiwanese people.

⁹For each variable, see the first, second, third, fourth, and eighth row of Table 7 respectively.

Table 8: Index 2 of Asian Family Values and the mean score of each variable of the component in separate data analyses.

Index and rank variables	Korea	Japan	Taiwan
Index 2 of Asian Family Values	4.0 (1.2)	3.9 (0.9)	4.2 (1.1)
Older Husband than wife	4.5 (1.5)	4.0 (1.0)	4.8 (1.5)
Husband’s career first	4.4 (1.7)	4.1 (1.2)	4.6 (1.7)
Traditional gender role	4.1 (1.8)	4.2 (1.3)	4.5 (1.8)
Woman’s lay off first	2.8 (1.6)	3.2 (1.3)	2.7 (1.6)
Husband’s family first	4.1 (1.6)	4.0 (1.1)	4.3 (1.5)

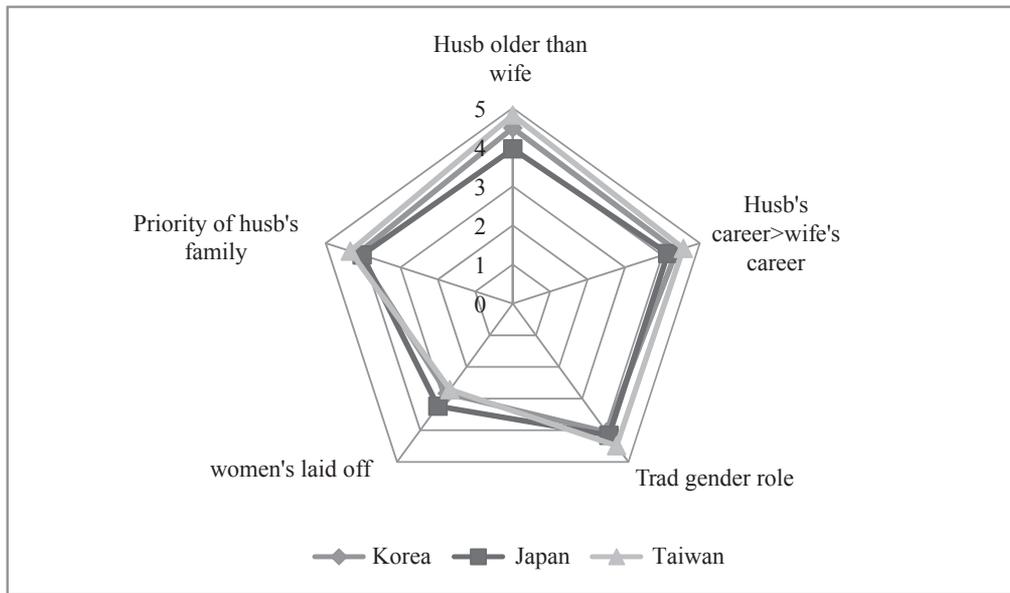


Figure 2: Mean of common variables included in Index 2 of Asian Family Values among Korea, Japan, and Taiwan.

$$\text{Index 3 of Asian Family Values for Korea and Taiwan} = (\text{Older husband than wife} + \text{Husband’s career first} + \text{Traditional gender role} + \text{Lay off women first} + \text{Husband’s family first} + \text{Family succession by a son})/6$$

Korea’s value of Index 3 of Asian Family Values is 4.093 (standard deviation 1.158), and Taiwan’s corresponding value is 4.208 (standard deviation 1.093). The results indicate that Taiwan has slightly stronger Asian family values than Korea.

5 SUMMARY AND CONCLUSION

The history of debate surrounding Asian values is long. However, no genuine analysis has examined the existence or content of Asian values. The discourse on Asian values is significantly comprised by discourse

on family values. Although the characteristics of East Asian families and the family values essential to these familial characteristics comprise a core Asian value, no scientific methodology that systematically examines these issues has been adopted despite the long debate on Asian values.

Not only Western but also East Asian scholars believe that East Asian families have unique characteristics that distinguish them from those in other societies. With these particular characteristics, the East Asian family is essentially labeled as a "Confucian family." A Confucian family is one observed in societies that have shared experiences of Confucianism; further, families with similar characteristics to those of Confucian ones are included as Confucian families, even if they experienced no Confucianism or a significantly small amount thereof. Yet, there has been no systematic debate over what kinds of families are Confucian families and what kinds of family values exist in these types of families.

This study analyzed family values in three East Asian societies, which constitute an important part of Asian values, which in turn help to distinguish East Asian families from those in other societies. Family values are usually researched as a part of social values.

Although the questions on family values often used in quantitative research were developed in Western societies, these have not successfully revealed the unique characteristics of East Asian families. Persistent attempts have been made within each society to develop and apply unique questions on family values in order to identify the distinctive characteristics of each society. However, not many studies have advanced beyond such treatments of individual societies' family values as Confucian family values or East Asian family values.

Therefore, there is a lack of studies that aim to discover a distinctive form of family values that can be called East Asian family values. Against this backdrop, this study has analyzed the family values of East Asian families as a partial effort to identify the characteristics of East Asian societies.

This study adopted the data of the East Asian Social Survey 2006, in which Korea, Japan, Taiwan, and China participated. East Asian scholars adopted some general family-related questions developed in Western societies and newly developed questions to identify the universal and distinctive features of East Asian families, respectively.

Principal component analysis was employed to determine both the existence and contents of Asian family values. Principal component analysis is a statistical method used to confirm whether numerous questions used to measure an intended content indeed reflect the same content; questions measuring an intended content are then grouped into a component. The items on family values included in the East Asian Social Survey 2006 include ones developed to determine the distinctive characteristics of East Asian families, such as inheritance of the eldest son, family succession with respect to sons, the authority of the father, and androcentric family perceptions. Practically, many questions are required in order to identify these characteristics. However, given the tendency for research involving too many questions to become very difficult, only one or two questions are used to examine each concept. Many questions can be found to refer to common contents using principal component analysis. Although these contents are not as clear as those on gender roles and economic support, we expect to call them Asian family values if the questions indicate certain

common contents. For these reasons, I adopted principal component analysis as the main analytical method.

The social survey from which the data were extracted was conducted in Korea, Japan, Taiwan, and China in 2006. However, this study only used data from non-socialist societies (i.e., Korea, Japan, and Taiwan). As the first step to identify Asian family values, principal component analysis was applied to pooled data across the Korean, Japanese, and Taiwanese data. Then, the data from Korea, Japan, and Taiwan were analyzed individually by society.

A few core components were extracted from the pooled data. The first component consisted of questions that examined societal attitudes toward both adult men and women regarding the provision of economic support to their parents. The content of the second component initially seemed unclear; generally, when it is difficult to identify a common content, the component is excluded from the analysis in the next step. However, the aim of this research was to determine whether certain Asian family values are shared by Korean, Japanese, and Taiwanese societies, so this seemingly unclear component was titled “Asian family values.” The questions comprising the Asian family values components extracted from the pooled data across the three societies largely reflect attitudes about Asian families, such as the following: the husband should be older than the wife, the father’s authority should be respected unconditionally, children should bring honor to their parents, married women should help their husbands’ families before her own, and individuals should prioritize the family’s well-being before their own. Certain characteristics of Asian families, such as androcentrism, male-centeredness, top-down parent-child relationships, and

paternal authority were extracted as a component. Through this component, I discovered that Asian family values exist in the three societies and concluded that Asian family values consist of the characteristics observed above.

No matter how the data are analyzed, Taiwan was observed to have slightly stronger Asian family values than Korea and Japan. Conversely, Japan had the weakest Asian family values among three societies. Korea’s level of Asian family values was between those of the other countries, with relatively small differences between the values. The facts that Confucian influence is relatively weaker for Japanese people in everyday life, Japan’s contact with Western societies came earlier, its history of modernization is much longer, and its patriarchy within the institution of family is relatively weaker than those of Korea and Taiwan may explain the relatively weaker Asian family values in Japan. In addition, the beliefs that the eldest son should inherit a larger share of family property and that paternal authority is always respected were weaker in Japan than in Korea and Taiwan.

In conclusion, the debate on Asian values progressed for a long period, and efforts were previously made to clarify the true nature of that construct. Because of the many criticisms of Asian values that developed, one of the important contents of Asian values is Asian family values. Despite this fact, there has been only marginal experimental research on the existence of common Asian family values throughout East Asia. I argue that family values that can be called “Asian family values” or “East Asian family values” are present in East Asian societies, including Korea, Japan, and Taiwan. The results of this study indicate that characteristics that

were vaguely believed to be characteristic of East Asian families, such as authoritative and patriarch-centered families, unequal marriage relationships, and vertical parent-child relationships are indeed common family values across East Asian societies. Although the precise nature of “Asian values” is still unclear, it seems that “Asian family values” as a pivotal part of Asian values have been identified through data from the East Asian Social Survey 2006.

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Creating New Public Spheres through Low-Carbon Policy: The Case of Kyoto City, Japan

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ABSTRACT

Since the Fukushima Daiichi nuclear power plant accident in 2011, many Japanese people have been galvanized against a centralized power-supply system based on nuclear power. A key issue in the achievement of distributed power generation at the local level is the dissemination of renewable energy by local resources and citizens. This will be a common challenge for Asian countries, although energy policy and the power-supply system are still dominated by central government and related industries, and public participation in the system is still limited. However, low-carbon policies have already been implemented in various contexts in Japan. New challenges include applications involving public bodies, non-governmental organizations, citizens, and cooperation between public administration and private companies. This might create a new public sphere characterized by increased discussion; cooperation; and management of local resources, renewable energy, and amenities with public participation. This paper analyzes the challenges and situation of Kyoto City's low-carbon

policy to facilitate further improvement of Asian local policy.

KEY WORDS

Low-carbon city planning, Kyoto, Public sphere, Citizen participation, Renewable energy

1 INTRODUCTION

Compared with those of the Kyoto Protocol base year (1990), Japan's greenhouse gas emissions have not been reduced by effective national-government policy. However, the national government has still not devised more specific and effective reduction policies. A creative approach is essential to overcome this situation by encouraging joint participation of citizens, civic organizations, governmental bodies, and companies (and collective community building and development among them). Some local low-carbon policies in Japan have begun as specific initiatives in different municipalities¹.

¹For information about the municipality's countermeasures for global warming in Japan, see (Mizutani Yoichi, Sakai Masaharu, and Oshima Ken'ichi 2007) and (Wada Takeshi and Taura Kenro 2007).

The 2011 nuclear power accident in Fukushima also shows the unavoidable risk to Asian countries. A distributed power-supply system based on renewable energy and local resources is essential to make Asia more safe and sustainable. Asian countries have already enacted environmental and energy policies; however, those policies have been almost completely decided and implemented by government without the participation of citizens. People's environmental and public spheres are given, not generated by themselves. Social planning is one essential contributor toward the realization of a sustainable society (Ikeda 2012, 64–65). The design of low-carbon cities through indigenous social planning and practice is Asia's new challenge for the creation of new public spheres. It is essential to share information and lessons, but few research papers have explained the relevant local challenges in English. The aim of this paper is to elucidate local challenges through a case study of Kyoto City in order to provide hints for low-carbon city planning in other countries (especially those in Asia).

This paper explains and analyzes the main initiatives of the low-carbon city strategy of Kyoto City. Especially, it focuses on the key elements of the Kyoto Model Environmental City Action Plan of 2009 and analyzes its originality, significance, and future development possibilities.

2 KYOTO CITY AND CLIMATE CHANGE

In 1997, as is well known, Kyoto City was the location of the third session of the Conference of the Parties to the United Nations Framework Convention on Climate Change (COP3) and the birthplace

of the Kyoto Protocol. Before COP3 was held, Kyoto City had formulated the “Kyoto Global Warming Countermeasure Promotion Plan” in July 1997, which set a CO₂ reduction goal of 10% by 2010 (as compared with the year 1990). A plan to realize this commitment practically, the “Kyoto Agenda 21,” was formulated in 1997; it aims to achieve harmony with the environment and a sustainable society. That agenda consists of three basic policies: (1) utilizing Kyoto-specific lifestyle and business activities; (2) creating a circulation system that is in harmony with the environment's energy and materials; and (3) creating eco-friendly transportation and logistics systems. Further initiatives include: (1) systematic planning of energy and resource conservation; (2) planning of a green economic network; (3) development of a new industrial system based on ecology; (4) implementation of urban ecotourism (environmentally friendly tourism); and (5) the creation of environmentally friendly transportation systems (Kyoto Agenda 21 Review Committee and Kyoto City 1997,10). The awareness of citizens, businesses, and government partnerships is essential for the realization of these principles. The “Kyoto Agenda 21 Forum” was founded as a cooperative organization that incorporates public administration, business, academia, and citizenry in 1998. The forum plays an important role in the city's low-carbon policies.

On April 1, 2005, the “Global Warming Countermeasure Ordinance”—the first such ordinance in Japan—was enacted by the city. This ordinance included the obligation for large-scale greenhouse gas (GHG) emitters to submit details of their GHG emissions, 3-year reduction plans, and reduction goals for each year. The ordinance also listed the responsi-

bilities of municipalities, business owners, citizens, and tourists². In 2006, the “Kyoto Global Warming Countermeasure Plan” was formulated; this reviewed the actual results of the Kyoto Global Warming Countermeasure Promotion Plan 1997 and set new targets, such as emission-reduction targets, by sector (Kyoto City 2006).

In January 2009, Kyoto City was selected by the national government as an “environmental model city³.” In March of the same year, the “Kyoto City Environmental Model City Action Plan” was formulated and published. This plan’s goal was to strengthen the Kyoto Agenda 21 initiatives and implement new measures, including substantial medium- and long-term emissions-reduction plans.

3 GHG EMISSIONS IN KYOTO CITY

By 2007, the GHG emissions of Kyoto City’s industrial sector had decreased by 40% compared with 1999 levels (Table 1).

There are several reasons for the reduction: First, the industrial sector improved its fuel conversion rate, especially by switching from oil to natural gas. Second, the city formulated unique countermeasures for use by small and medium enterprises (SMEs). The “Kyoto Environmental Management System Standard” (KES, introduced in 2001) is an inexpensive and easy-to-understand environmental management system for SMEs. The idea and system was created during the Kyoto Agenda 21 Forum. The “Nonprofit Organization Kyoto Environmental Management Standard” (NPO KES) has been managing the KES system since 2007; under this system, even very small companies can conduct environmental activities with consultation from NPO KES at low cost. A company’s KES certification can be used as proof that it is environmentally friendly. Business partners receive green certifications for products purchased from companies with KES certification. A total of 4015 such certificates had been issued

Table 1: Kyoto City’s greenhouse gas emissions (FY 1990, 2006, 2007; units: 10,000 tons CO₂).

Year	1990	2006	2007	2007 compared with 1990	2007 compared with 2006
Total GHGs	772	716	737	-4.5%	3.0%
CO ₂	725	682	705	-2.8%	3.4%
Industry (factories, etc.)	195	114	117	-40%	2.8%
Transportation (cars and trains)	197	178	176	-10.7%	-0.8%
Businesses, services, offices	152	177	187	23.7%	6.2%
Households	155	186	200	28.8%	7.7%
Waste incineration	25.8	27.8	24	-7.0%	-13.6%
Other GHG _s (except CO ₂)	47.1	34.2	32.7	-30.6%	-4.4%

Source: Kyoto City (2010), p. 2, 6.

²In this context, “ordinance” refers to a regulation enacted by a local council.

³The city challenges itself with high targets and pioneering efforts for the realization of a low-carbon society.

by the end of July 2012⁴. Schools can also receive KES certification. KES now forms communities (called KESCs) among KES schools, KES companies, and local citizens to provide environmental education, hold activities, and conduct community open houses in order to raise awareness.

Third, large-scale emissions sources are obliged to follow the GHG-emissions-reduction plan and performance report under the Kyoto Global Warming Countermeasure Ordinance (which was enacted in April 2005). These policies contributed to GHG reduction in the industrial sector⁵; however, the CO₂ production levels of businesses, services, and households were greater in 2007 than 1990. Thus, further reductions in these sectors have become an important challenge for the city.

4 KYOTO ENVIRONMENTAL MODEL CITY ACTION PLAN 2009⁶

Because of the above-mentioned situation, Kyoto City needs to continue its improvement of industry measures and introduce new measures to the service, business, and household sectors. Kyoto City was certified as an environmental model city by the national government on January 31, 2009 for pioneering efforts to realize a low-carbon society through dramatically reduced GHG emissions; the Kyoto Environmental Model City Action Plan

was released in March of the same year. It states medium- and long-term reduction targets: 40% and 60% reductions in CO₂ emissions by 2030 and 2050, respectively, compared with 1990 levels; further, the plan enumerates the eventual goal for Kyoto to become a carbon-neutral city.

4.1 The Framework of the Kyoto Environmental Model City Action Plan 2009

From the perspective of the social mechanisms of change, the main distinguishing feature of the Kyoto Environmental Model City Action Plan is the fact that the change to low carbon consumption is taking place in a large city with a population of approximately 1.5 million. The idea is as follows: under this action plan, Kyoto City will try to enhance the characteristics of the city, such as its rich forest resources, cultural traditions, enterprising spirit, and creativity. The city will also try to change the lifestyle of the citizenry and further enhance the utilization of local resources. The GHG reduction targets can be achieved through greater use of local resources such as universities, research institutes, and high-tech industries. In addition, administration, citizens, and business partnerships are essential for their implementation.

The concrete outline of the plan is as follows: (1) “Walking Town of Kyoto” (*Arukumachi-Kyoto*); (2) incorporation

⁴NPO KES Environmental Organization. Accessed August 18, 2012. <http://www.keskyoto.org/about/registration.html>. For more information on KES, see Wada Takeshi and Taura Kenro (2007), Chapter 7.

⁵The 1,124 KES-certified offices in Kyoto have achieved CO₂ reduction of 11,920 tons/year (about 10.6 tons per office; NPO KES Environmental Organization. Accessed February 20, 2012. <http://www.keskyoto.org/about/co2.html>).

⁶This section is mainly based on the *Kyoto Environmental Model City Plan* (Kyoto City 2009a).

of low-carbon architecture into the harmonious landscape; (3) conversion to a low-carbon, eco-friendly lifestyle; (4) innovations such as a low-carbon economy and product development; (5) thorough utilization of renewable energy resources; and (6) establishment of citizens' environmental funds.

4.2 The Walking Town of Kyoto and the Charter of Pedestrian Priority⁷

The Walking Town of Kyoto approach aims to build a new public transportation network and give top priority to pedestrians in order to shed the label of being a "car society." This approach mainly aims to enhance the utilization of public transportation in order to decrease car use in the city. The goal is to enhance the non-automobile (walking, public transportation, and bicycle) rate from approximately 72% in 2009 to over 80% (the highest level of any equivalently sized metropolis in the world) in the near future through reduction in the use of cars.⁸

The concrete measures proposed under the approach are as follows: the first measure is to bring about an increase in public-transportation utilization by, for example,

adjusting train timetables to facilitate connections between trains (as reducing transit times for trains, buses, and other forms of public transportation increases their convenience).⁹ The establishment of the "Kyoto City Common Day Ticket" (the Kyoto Card, which can be used for all trains and buses in the district) also encourages people to make greater use of public transportation.

Other measures in the sightseeing arena include expansion and year-round implementation of the "park-and-ride"¹⁰ district. The creation of an "eco-car zone" in which only electric cars are permitted is also planned. The creation of a "mobility week," when certain cars cannot be used in certain districts at certain times, is being discussed. In addition, Light Rail Transit (LRT) and a toll system for roads in the city center are being discussed. Regarding the aforementioned Traffic Demand Management (TDM), such systems have already been implemented in other municipalities in Japan, but Kyoto's implementation is noteworthy because of the Walking Town of Kyoto measures included in its transportation review. The "Kyoto Pedestrian Priority Charter" (*Arukumachi Kyoto Charter*) was enacted as the first legislation of its kind in Japan on January 3, 2010. This

⁷Most of the contents of this section are based on ("Walking Town of Kyoto" General Traffic Strategies Planning Council 2009).

⁸The goal is 20% car use and 50% foot and bicycle travel ("Walking Town of Kyoto" General Traffic Strategies Planning Council 2009, 1).

⁹The aim is to increase use of public transportation by optimizing train timetables.

¹⁰This is a system to control the number of the cars that enter the urban area to relieve chronic traffic congestion in the city. It aims to encourage drivers to park their cars near stations along the highway and transfer to transit-bus, train, or other public-transportation systems ("Walking Town of Kyoto" General Traffic Strategies Planning Council 2009, 8).

charter¹¹ provides for the citizens of Kyoto City, tourists, government, and businesses to promote the conversion of public traffic from a car-dominated to a pedestrian-dominated system collectively. According to a survey of 14,700 citizens by the Walking Town of Kyoto General Transportation Strategic Planning Council, 80%–93% of citizens answered that “urban planning of non-car dependency is necessary,” and 71%–90% answered that I myself drive cars less than before (“Walking Town of Kyoto” General Traffic Strategies Planning Council 2009, 13). The charter can help to raise awareness among tourists as well as citizens.

4.3 Urban Planning for the Landscape and Low-Carbon Architecture

As mentioned, Kyoto is a large city with a population of about 1.5 million, but three-quarters of the city’s area is covered by forest. The city is known as a scenic spot; in addition, the city has 1,200 years of history and historical heritage. The city has grown around its beautiful landscape under such circumstances, but overdevelopment and increased construction—for example, of apartment buildings, especially since the 1980s bubble economy—has caused a significant loss of the historical and beautiful landscape.¹² For this reason, Kyoto City has implemented new landscape policies since September 2007, enacting new standards such as regulations on height, design, and outdoor advertisements. Regulations on buildings’ height and outdoor rooftop advertisements under the new landscape policies are also expected to

reduce emissions. The Kyoto City Environmental Model City Action Plan 2009 emphasizes this “low-carbon landscape” policy by promoting the utilization of wood produced in the city area and aims at harmonious, low-carbon community-landscape design. The main initiatives of this policy are: (1) to spread low-carbon buildings (homes) aimed at harmonizing with the landscape and (2) to consider the use of local timber.

Regarding the first initiative, planning is the main criterion for a good, low-carbon landscape; the Comprehensive Assessment System for Built Environment Efficiency Kyoto (CASBEE) was used to spread and establish a certification system for low-carbon landscape building. Additionally, the model construction of “low-carbon landscape hybrid houses” (*Heisei-no Kyo Machiya*) and their dissemination is planned. Low-carbon landscape hybrid houses aim to match the traditional Kyo Machiya houses with new low-carbon technologies; this creates new value through the effective use of regional materials and energy, which results in long-lasting housing. These houses add utilization of natural-energy resources to traditional Kyo Machiya, such as solar water heaters, solar photovoltaic energy, geothermal heat, and rainwater systems, to achieve low carbon emissions and landscape protection.

Regarding the second initiative, utilization of the city’s industrially produced wood is planned for promotion under an arrangement called the “*Miyako Somagi* certification system.” Kyoto Woodman Business Studio is a business that promotes the

¹¹In Japan, a charter is not a regulation or ordinance but a voluntary norm established by municipalities to guide town planning. The municipality collects citizens’ opinions for action goals or norms.

¹²For more information about landscape destruction in Kyoto and citizens’ movement against it, see (Kimura 2007).

revitalization of city forestry in Kyoto City and has already begun using the wood. This business has established renovation model facilities using local wood products and has established one studio in each region to promote renovation using regional timber.

The city tries to combine Kyo Machiya construction with utilization of local timber to take advantage of the availability of local timber and increase the production of local wood and its consumption in the building of low-carbon, landscape-friendly buildings. The use of local wood (especially logged wood) for guardrails and public buildings is also being considered.

4.4 Conversion to a Low-Carbon Lifestyle

Kyoto City's vital issue is to switch the residential sector to an environmentally friendly, low-carbon lifestyle. The Kyoto City Environmental Model City Action Plan 2009 enumerates the need for activities that make use of Kyoto's "regional power," and it especially values cooperation between government and citizens. In 2009, there were 8,249 citizens' committees who worked in cooperation with municipal governments. They exhibit publications or collect citizens' requests and pass them to the public administrators of each area, such as school districts and boroughs. Since 1997, the city has used a tempura-oil recovery and biodiesel refinery that collects used tempura oil from homes, restaurants, etc. and uses it to create biodiesel fuel for vehicles. The citizens' cooperation plays an

important role in these activities: in 2009, used tempura oil was collected from approximately 1,200 houses and restaurants; the annual volume of used tempura oil recovered is approximately 161,000 L. This oil is used as fuel for all trash-collection vehicles in the city (approximately 170 units) and some city buses (93 units).

The promotion of citizens' training is planned by the Kyoto (Miyako) Ecology Center (Kyoto City Environmental Conservation Centre). "Eco supporter" is the name given to environmental volunteers who work for the district; there are already 89 of these, and the plan is to increase this number by 20 supporters per year. Eco supporters perform activities such as energy-conservation consultations with local residents, talks with local learning societies, and coordination with city wards and local residents to promote conversion to low-carbon lifestyles.

Further, KES, which applies to schools through the "School Edition KES,"¹³ has been promoted and developed. In addition to strengthening direct cooperation between the aforementioned administrators and local residents, it promotes home energy-saving initiatives such as "visible eco-points" given for energy conservation in each home that can be used to purchase goods. Carbon offsetting¹⁴ is also being planned.

4.5 Renewable Energy Promotion Plan

Kyoto City does not have suitable natural conditions for wind power because of its

¹³KES applies to schools. KES needs to build, implement, and operate the environmental improvement plan in environmentally friendly schools. Though these achievements and challenges have less environmental impact on a daily basis, the school conducts regular checks and review mechanisms.

¹⁴Emissions of events, products, and services can be offset by the company's or NPO's reduction efforts (Kyoto City 2009a, 21).

basin topography and its lack of a coast. Therefore, the city instead uses other forms of renewable energy, such as biomass, solar energy, and waste power generation.

The Environmental Model City Action Plan 2009 plans the technical development of biogas generation from household garbage, biodiesel-fuel generation from used tempura oil, solar power, and solar heat. In Kyoto, a subsidy system for solar-power equipment for houses has been in place since fiscal year 2003.¹⁵ The subsidy rate was increased in 2006 under the Kyoto Global Warming Countermeasures Plan, and it has also been applied to apartment buildings. Since 2009, the subsidy rate has increased from 45,000 to 50,000 JPY/kW for a maximum of 4 kW. In Kyoto City, if solar panels are installed in areas within the landscape-protection area, 30,000 JPY more is added to the subsidy (totaling 80,000 JPY). Approval from the Kyoto City Landscape Creation Ordinance, Urban Landscape Maintenance Ordinance, Scenic Area Ordinance, and other regulators is required for the installation

of solar-power-generation facilities in the city. These measures combine landscape protection with environmental policy.

Table 2 shows implementation status in 2003–2008. The total number of installed facilities and the installed capacity were 1,018 and 3,300 kW, respectively, in 2008. The reduction of CO₂ emissions achieved through utilization of subsidized solar power plants was 1,247 tons per year (Kyoto City 2009b, 47).

In response to governmental measures to spread the direct subsidy from the city, nonprofit organizations (NPOs), business owners, and citizens' participatory solar-power generation facilities have spread. One of them is the "Ohisama (Solar) Power Generation Project," which was established in 2000. This project is organized and operated by the NPO called the Kyoto Green Fund. First, this project challenges citizens or groups to save energy in their daily lives. The amount of savings they generate in so doing are then donated to the "Ohisama Fund" ([I] of Figure 1).¹⁶ The reserved Ohisama Fund is then donated to public facilities, such as

Table 2: Kyoto City solar power generation equipment for residences and apartment buildings.

Year (FY)	2003	2004	2005	2006	2007	2008
Number of residences and buildings with solar power equipment	173	155	172	224	191	103
Installed capacity (kW)	576	527	581	740	555	317
The effect of CO ₂ reduction (t-CO ₂)	218	199	220	280	210	120

Notes: t-CO₂ means tons of CO₂ (equivalent).

Source: Kyoto City (2010), p. 43.

¹⁵Kyoto City subsidies started as additions to subsidies from New Energy Foundation (NEF) in 2003–2005. Kyoto City implemented its own subsidy in 2006 (Kyoto City 2009b, 47).

¹⁶In addition, Ohisama project participants each donate 3,000 JPY (voluntary, collected at every project); Ohisama friends establish donation boxes in their homes/offices and collect donations.

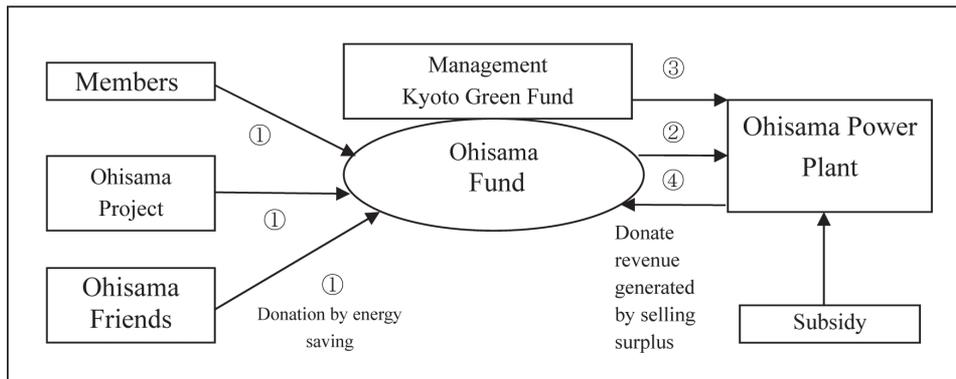


Figure 1: Ohisama power generation system.

Source: NPO Kyoto Green Fund, <http://www.kyoto-gf.org/kgf/system.html>, accessed March 5, 2013.

kindergartens, nurseries, or joint work places to pay for solar-power-plant construction costs ([2] of Figure 1). The Ohisama Power Plant is managed, operated, and supported by the Kyoto Green Fund ([3] of Figure 1). Additionally, the Ohisama Power Plant, which is a solar power plant, sells surplus electricity to power companies and donates a portion of the proceeds to the Ohisama Fund ([4] of Figure 1). Figure 1 shows a schematic of the entire system.

This system is also supported by subsidies from the New Energy and Industrial Technology Development Organization and private organizations. Such mechanisms encourage citizens' energy-saving initiatives and further encourage citizens to share the costs of installing renewable-energy systems. Solar-power facilities are being installed in kindergartens and nursery schools; such mechanisms also facilitate environmental education among children and neighborhood residents. By 2011, 15 branch Ohisama Power Plants had been built, generating total power of 103,000 kWh. Systems like the Kyoto Green Fund Ohisama Plant have spread to other regions in Japan: Okayama, Fukuoka, and Nara Prefectures have introduced the same kind of system.

Furthermore, the Kyoto Green Power Certification System is being implemented to utilize the natural energy made by the Ohisama Power Plant. Under the system, the added environmental value of the power made in the Ohisama Power Plant that is sold for private consumption is defined as "green certification." Green certifications are mainly sold to business owners or event organizers. Payment for green certifications is used for further dissemination of renewable energy; the system has been running since fiscal year 2007 on a trial basis. Green certifications totaling 3,800 kWh was issued under two purchases made in 2007. The price of green certifications is 10 JPY/kWh; it can be purchased in increments of 1,000 or 10,000 kWh. Buyers can use the "Kyoto Green Energy Mark" to show their commitment to the prevention of climate change. The use of green certifications serves as a carbon offset for private companies or tourism events (e.g., the illumination event in Arashiyama, a famous sightseeing location in Kyoto).

Via those mechanisms, buyers can contribute to the dissemination of solar-power generation through their businesses or events by purchasing green certifications. They can appeal to their environmental

contribution through their purchase of solar-power-based added environmental value (green certifications).

Green certifications can be used for tourism events; therefore, they play a role in educating local residents and tourists about the importance of the Ohisama Power Generation Project and renewable energy in general. The Ohisama Power Generation Project and the Kyoto Green Power Certification System both facilitate the dissemination of renewable energy and encourage citizens and business owners to promote joint initiatives. The Environmental Model City Action Plan 2009 states that these types of renewable-energy systems will be further promoted by cooperation between citizens, businesses, and NPOs.

4.6 Kyoto Citizen’s Environment Fund

The most important factor is the financial resources that enable continuous and progressive low-carbon planning in Kyoto. Under the Kyoto Environmental Model City Action Plan 2009, the “Kyoto Citizens’ Environment Fund” was established as a new financial resource in 2009 (Figure 2). The Fund was established with 4 billion JPY from the Kyoto Prefecture Environmental Conservation Business Promotion Fund; the enterprise was partly funded by charging for plastic garbage bags (a scheme introduced in 2006, with revenue of 900 million JPY/year). The tax for forest conservation (forest environment tax),¹⁷ donations for specific purposes (for CO₂ reduction

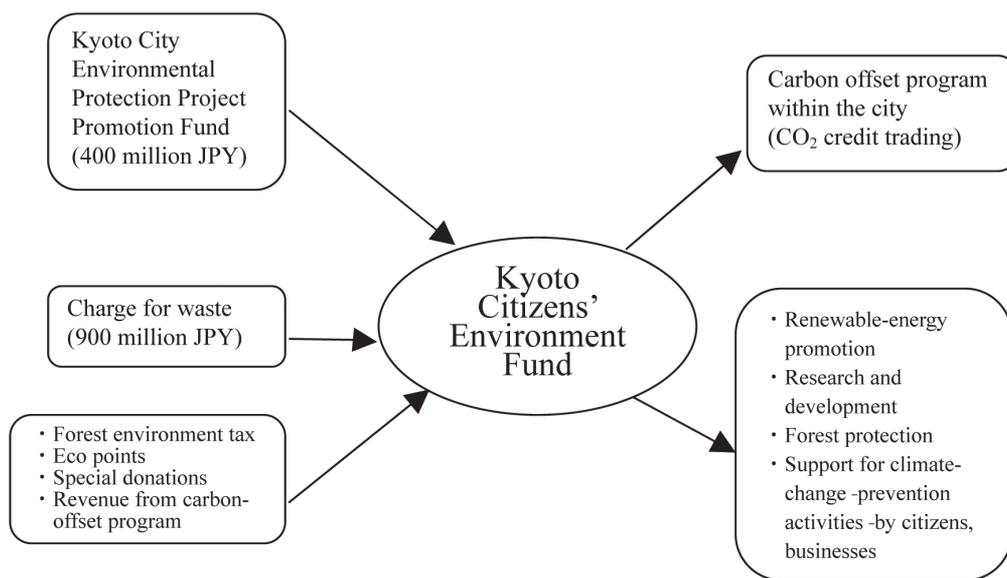


Figure 2: Kyoto Citizens’ Environment Fund—concept

Source: Kyoto City (2009a).

¹⁷Tax-revenue expenses for forest maintenance (i.e., for securing sources of greenhouse-gas absorption) and urban-greening measures (for heat-island phenomenon mitigation). A similar tax known as the “Charge for the Forest Externalities” has already been introduced in some Japanese cities. In the case of Kyoto City, it provides the financial resources for urban greening and the protection of forests against climate change.

and the expansion of absorption by forest conservation), and eco-points will also be accepted into the Kyoto Citizens' Environment Fund. The budget of the Citizens' Environmental Fund supports carbon-offset projects in the city (i.e., deployment of CO₂-reduction credit exchange), introduction and dissemination of renewable-energy technology, development and dissemination of low-CO₂-emission equipment, research and technology development, forest maintenance, and global-warming-prevention activities by citizens and companies (Kyoto City 2009a, 32).¹⁸

The Kyoto Citizens' Environment Fund does not rely only on donations. It uses the garbage-bag charge and the tax for forest conservation as financial resources to ensure the fund's sustainability. Future problems for the fund are that a tax for energy use (the main source of GHGs) has not yet been introduced in the city and that it is dependent on other taxes (especially the trash charge, which was originally a countermeasure for waste control). Furthermore, the forest environmental tax has not yet been implemented in the city.

5 FUTURE CHALLENGES AND PROSPECTS

5.1 Transportation Policy

The Walking Town of Kyoto is an ambitious initiative, and the "Pedestrian Priority Charter" aims to grow the city out of the vehicle-based transport system. However, it is still faced by many practical challenges.

First, the park-and-ride policy still does not advertise itself sufficiently to visitors.

Most visitors do not park their cars in the neighborhoods of tourist attractions, as relief of congestion problems near sight-seeing locations has been insufficient. Second, the establishment of LRT has been discussed for many years, but many obstacles still impede its implementation, for example, the difficulty of securing financial resources and land for garages and train stations and the impacts of overhead wiring and building on the landscape. Further, though the Pedestrian Priority Charter is an epoch-making approach, it is unclear whether the reform of the transportation system will have any role or effect. Third, economic instruments such as a toll system are being considered to manage traffic demand, although implementation would be difficult. The funding mechanisms are not sufficiently well established to achieve the Walking Town of Kyoto sustainably, and the shift from cars to public transportation will be difficult without greater responsibility imposed upon drivers. Economic instruments must be considered to enable control of traffic demand in the city center.

5.2 Landscape and Low-Carbon Policies

Landscape policy has been stressed in Kyoto City, because the city has 1,200 years of history and many historical monuments. The city combines low-carbon city planning with landscape policy. For house/building construction, the city has established CASBEE standards and a low-carbon-landscape-construction certification system in order to achieve landscape protection and low-carbon architecture

¹⁸Furthermore, by utilizing the charge for garbage bags as a financial resource, waste-related businesses will be maintained.

through the use of local wood. This system aims at further construction and dissemination of low-carbon landscape hybrid housing (Heiseino Kyo machiya) to protect land and forestry development in the city.

The city has also added subsidies for the installation of solar-power facilities in areas considered to fall into the landscape-protection scenic area; this requires a combination of renewable-energy promotion and landscape policy.

A future challenge is promotion of the use of timber produced in the city for the construction of low-carbon housing. For example, there should be production and distribution systems for wood that accept even small orders through subsidies or tax incentives (“Heiseino Kyo Machiya” Review Project Team 2009, 62). Further, measures to assure financial resources for the system are also needed for the promotion of low-carbon landscape policies: the introduction of a landscape tax should be considered.

5.3 Changing the Lifestyles of Citizens

Kyoto City is trying to raise citizens’ awareness of CO₂ reduction through training of citizens’ committees and eco supporters and cooperation with NPOs; this cooperation is having an effect. However, there is still no policy to control the energy use or change the predominant lifestyle of the municipality. For example, as part of the city’s energy-saving measures, nighttime business regulations for convenience stores were planned in 2008. However, this plan was abolished due to strong opposition from the industry. Therefore, measures have depended on voluntary initiatives. No established policies provide an incentive to reduce energy use or consumption in accordance with a low-carbon lifestyle.

Further implementation of regional environmental taxes for energy use in the city should be examined while ensuring that voluntary approaches continue.

5.4 Renewable Energy Promotion Plan

Kyoto City’s renewable-energy policies consist of not only solar-panel subsidies from the government but also the combination of landscape policies. Ohisama Power Plants are promoted by NPOs and citizens, and the Kyoto Green Power Certification System has been practiced by citizens, civic groups, and businesses. The future challenge of the citizen-participatory plants lies in their financial resources, which depend on external subsidies, donations, and voluntary purchases of green certifications. Their financial sustainability has not been secured, and the incentive for purchasers of green certifications is quite weak. In the future, the Green Power Certification System must be applied to the new carbon-offset project in the city (i.e., one characterized by reduction-credit transactions) to strengthen the incentive for sales of certifications. Further, new subsidies for solar-power-generation equipment used in low-carbon landscape hybrid houses (Heiseino Kyo machiya) should be considered.

CONCLUSION

Kyoto City’s low-carbon policy can be considered as a comprehensive urban policy, with reforms in transportation, tourism, landscape, environment, and industry all focused on the reduction of carbon emissions. It is an integrated policy characterized by a combination of low-carbon urbanism and landscape conservation that utilizes the city’s accumulation of natural

resources and historic buildings, especially via the protection and reconstruction of traditional “Kyo Machiya” and use of local wood. The KES certification system is promoted to SMEs, and citizens’ and groups’ participation is encouraged by Ohisama power and the Green Power Certification System and its combination with tourism. The approach aims to reform the transportation system and promote renewable energy through citizens’ participation, tourism strategies, landscape policy, and global-warming measures. This could be a great reform of traditional urban policy that creates public spheres through policy implementation.

The problem of the system is that it is run completely voluntarily, so there are insufficient incentives to control excessive production and consumption. In addition to reinforcing the voluntary approach, the city should consider establishing economic instruments of environmental policy, such as taxes or incentives, to control high carbon production and consumption and the lifestyles that cause them. Though the city introduced and implemented a system to charge for household garbage bags in 2006, other taxes or charges to encourage low-carbon lifestyles have not yet been established. It is important to increase the financial resources dedicated toward the Environmental Model City Action Plan in order to achieve radical reform of existing urban systems. In terms of financial resources, the Kyoto Citizens’ Environment Fund uses funds from the garbage-bag and forest-environment taxes; in the future, that money should be used for emission trading or investment in new energy. This fund is expected to be an important tool for the continuous practice of climate-change measures; however, the consistency of the fund should be carefully considered.

The city’s challenge is clearly different from the previous government’s one-way policy. Continuous improvement of these policies contributes to the creation of a distributed power supply system (i.e., movement away from a centralized system). The policy also reconstructs the public sphere through the management of local resources and city planning. Active participation of all stakeholders will improve the situation.

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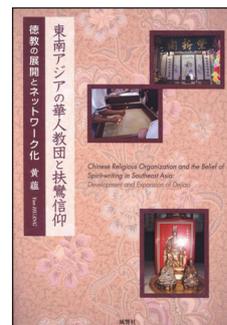
A review of

Huang, Yun. 2011. *Chinese Religious Organization and the Belief of Spirit-writing in Southeast Asia: Development and Expansion of Dejiao*, Tokyo: Fukyusha.

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This book is about *Dejiao* (德教, which translates to “moral uplifting society” in English), a religious organization that has been rapidly expanding since the 1980s among Chinese communities in Malaysia, Singapore, and Thailand. It focuses on the development of *Dejiao* in Malaysia, where more than 100 *Dejiao* organizations have been founded to date.

The author, Yun Huang, was born in Shaanxi Province, China, and obtained her PhD from Osaka University in 2008. She is currently a researcher with Kyoto University’s Global COE Program, “Reconstruction of the Intimate and Public Spheres in 21st Century Asia.” This book is based on her PhD dissertation as a product of field research conducted intermittently in 2003–2008 and updated with field research in 2009–2010.

This book offers various fresh points of view on Chinese society in Malaysia today, especially regarding contemporary religious movements, Chinese people’s strategies to gain recognition as fully fledged members of the state, political economy at the grassroots, and the construction of transnational networks. The book contains the following chapters:

Introduction: An Anthropological Study of Migration and Religion

Chapter 1: The Early History of *Dejiao*: the Planchette Cult Movement and *Dejiao*

Chapter 2: Chinese Communities and Popular Religious Sects in Southeast Asia

Chapter 3: The Development of *Dejiao* Organizations in Contemporary Malaysia

Chapter 4: *Dejiao*, the Nature of Teochew, the Ideology of the Merchants, and God’s Will

Chapter 5: Intellectual Development of *Dejiao* and the Ideology of the Religious Organization

Chapter 6: The Transnational Expansion and Networks of *Dejiao*

Conclusion

The definition of a *Dejiao* organization is the focus of Huang’s discussion, as *Dejiao* institutions engage in various activities, from charity and mutual help to culture and recreation. Some researchers regard a *Dejiao* organization as a religious body, while others regard it as charitable in nature. Huang places various *Dejiao* organizations onto the religious–secular continuum according to dialect or surname.

What came to be regarded as the first *Dejiao* originated in Teochew Prefecture (潮州), a region in southern China, in 1939. Located in Chaoyang District (潮陽縣), it was named *Zi Xiang Ge* (紫香閣), “pavilion of purple fragrance,” and its main activities were planchette divination (known as *fuluan* [扶鸞] or *fuji* [扶乩]) and charity. The formation, development, and organization of the notion of *Dejiao* began in the early 1940s. Other “pavilions” (閣) were also founded in Teochew Prefecture, not only in Chaoyang but also in Chenghai District (澄海縣) and Chaoan District (潮安縣).

Dejiao spread to Southeast Asia between the late 1940s and early 1950s with the establishment of the communist regime in China. In 1947, several notable heads of pavilions who had driven the development of *Dejiao* in Teochew fled overseas and founded pavilions

in Thailand and Hong Kong. From there, Dejjiao spread to Singapore and then to Malaya in 1952.

One of the principal tenets of Dejjiao is belief in the Holy Sages of the five principal religions: Taoism, Confucianism, Buddhism, Christianity, and Islam. The canon of Dejjiao follows the words and deeds of the Buddha, bodhisattvas, deities, and sages.

The main branch of Dejjiao is marked by the presence of the Chinese characters *Zi* in Mandarin or *Che* in the Teochew dialect (紫, meaning "purple") in the name of the pavilion, as in Malacca's *Che Chiang Khor* (紫昌閣). The *Zi* group plays a leading role in the United Moral Uplifting Society Malaysia (馬來西亞垂德教聯合總會), an umbrella group that encompasses most Dejjiao organizations in Malaysia. Other branches included the *Ji/Chee* (濟) group, which started in Chee Tek Kok (濟德閣) in Ipoh, Perak, and the *Zhen/Chin* (振) group, which originated from Chin Ghee Kok (振義閣) in Kuala Kurau, Perak.

The *Zi* group officially abolished fuji spirit-writing in 1967, citing a divine revelation that the development of Dejjiao should now be based on human will instead. This message also revealed that divine will was sometimes ignored, distorted, or not properly understood. Huang discusses discourse among *Zi* members on the credibility of fuji sessions, mentioning that fuji sessions could be abused to garner advantageous operational and administrative positions. Most organizations belonging to the *Zi* group still follow this instruction, but some have resumed fuji, and others wish to resume it in the face of declining membership.

Dejjiao membership is open to all ethnic groups, but almost all members are ethnic Chinese, especially Teochew people from diverse social backgrounds. In most cases, Teochew businesspersons hold the leading operational and administrative positions in the organizations. Further, they often hold executive positions in local Teochew clan associations. For rich businesspersons, contribution to local grassroots organizations is one of the most efficient paths to social recognition and honorable status. They may be given honorable titles from heads of state, which can be useful for business development.

Huang notes that what people expect from Dejjiao organizations varies. Initially, most join seeking material benefits or solutions to worldly problems. In other cases, people join because they are interested in or attracted to the organization's cultural, recreational, or charitable activities. Some experience illumination, communicating with gods and sages through fuji sessions; such people become more focused on the philosophy of life and the rules of the universe than self-interest.

Dejjiao in Malaysia expanded rapidly in the 1980s in what Huang posits was a response to a government policy that started in 1971, when the Malaysian government launched the New Economic Policy to provide educational and economic assistance to Malays on the grounds that they lagged behind other ethnic groups in those areas. The government also launched the National Culture Policy to promote national solidarity, but this emphasized Malay and Islamic cultures as its fundamental aspects. The Chinese community felt economically, politically, and culturally marginalized, and one of their responses was to hold an annual National Chinese Cultural Festival. As a pillar of the Teochew community, Dejjiao functions as an arena in which they can represent their "Chineseness." On the basis of this observation, Huang discusses how the Chinese community in Malaysia maintains its Chineseness and promotes ethnic solidarity through religious practice.

In the 1990s, the Dejjiao organization entered a new era in two ways: first, it reinforced itself as a concrete religious body through theorization on its teachings and the fostering of religious specialists; second, it started to construct a global network. The former effort has not been very successful, while the latter has achieved certain results. Some pavilions are very active in establishing international ties with each other, and many cooperative projects and co-organized events have been held internationally, including world conferences. Dejjiao organizations have been founded throughout the Asia-Pacific region. Relationships with religious institutions in Hong Kong and Taiwan have been reinforced, and new blood has been brought into Dejjiao through the "In Search of Roots

Project”: Dejjiao members from Southeast Asia visit China both to search for the roots of Dejjiao and to revive it there.

Huang concludes that Dejjiao, as a loosely knit, religious-based network of charitable organizations, has developed as a result of the dynamic interaction between the migrant society and practices of Chinese businesspersons. In Southeast Asia, few Chinese intellectuals were well-versed in the traditions of high culture in China. In Chinese immigrant society, achievement in business was seen as the only path to success, unlike in China, where cultural literacy helped one to reach elite status. Chinese immigrants constructed their own religion that fit their worldview and ethics on the foundation of Dejjiao, which acted as a useful one-stop shop to seek both material profit and peace of mind under divine guidance while situating themselves in society through various cultural and charitable activities. Under these circumstances, theorization and elaboration of doctrine have not been very important.

In the Afterword, Huang acknowledges that it was rather surprising and sensational to encounter the beliefs and practices of popular religion among Chinese people in Southeast Asia: it was hard for her to understand why people were so “superstitious.” Her book’s answer to this question can be summarized as follows: Chineseness has developed distinctively outside of China according to local context.

Discussion of Chineseness (i.e., Chinese identity) has been a major focus among scholars on the Chinese diaspora. Previous works have often discussed that “China-related factors,” such as physical and emotional connections with China and the influence of and mobilization by Chinese bureaucrats and activists, caused Chinese people living overseas to maintain their “Chineseness” until the 20th century. In other words, China was regarded as the center of Chineseness, while Chinese people overseas were at the periphery. However, there are a large number who identify themselves as Chinese without actual ties to the homeland. The focus of the discussion is shifting to local contexts and factors; further, the definition of Chineseness differs by place according

to local factors absent in mainland China; this book coincides with that recent research trend.

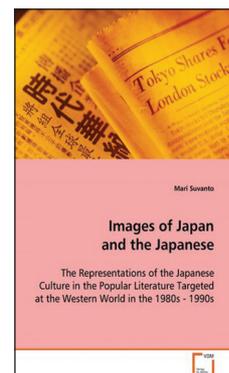
It is interesting that Huang cites the “In Search of Roots Project,” because it reflects the confidence of Chinese people in Southeast Asia regarding Chineseness. In this project, Dejjiao members search for both the roots of Dejjiao and their personal roots in China. In this sense, the members see China as the center of Chineseness. Nevertheless, the Dejjiao members from Southeast Asia lead the revival of Dejjiao in China, giving advice and guidance to people on the mainland. This process can be interpreted as “civilization”; now, the light of civilization shines from the periphery onto the center.

This book also contributes a fresh point of view to the discussion of Chineseness in Malaysia. Scholars inside and outside of Malaysia have contended that Chinese language and education are essential sources of Chineseness for the Chinese people in Malaysia, as described by the slogan, “Chinese language is the spirit of the Chinese” (華語是華族的靈魂). However, this is a translation from a slogan in Malay, “*bahasa jiwa bangsa*” (meaning “language is the spirit of race”) that appeared in the 1960s to promote implementation of Malay language as an official language and medium of instruction in national schools. Language and education have been significant issues since the decolonization period, as many related parties are engaged in Chinese media and education. They have struggled to obtain a governmental guarantee that Chinese language and education be continued in the new nation-state. The slogan “Chinese language is the spirit of the Chinese” came to be used to defend their right to use and study the language. Additionally, a large number of people cannot speak Chinese well but still identify themselves as Chinese; therefore, it seems doubtful that Chinese language and education alone maintain the Chineseness of the Chinese people in Malaysia. What then are the alternative factors that could maintain Chineseness? This book suggests that religious factors should receive more attention in answering this question.

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Suvanto, Mari. 2008. *Images of Japan and the Japanese: The Representations of the Japanese Culture in the Popular Literature Targeted at the Western World in the 1980s–1990s*. Saarbrücken: VDM Verlag.



Who are the Japanese, and what kind of country is Japan? These are the questions about which non-Japanese people (and the Japanese themselves) have wondered for centuries. There have been a wide variety of answers, starting with Marco Polo's (1307) account of the Japanese as having "fair complexions, being well-made and civilized in their manners," and culminating with the 20th-century image of *sarariiman* by Richard Tames (1985): "The diligence and loyalty of the Japanese worker became almost legendary."

In this book, Mari Suvanto gives brilliant insight into the genealogy of such imagery produced during Japan's so-called "economic miracle period" and immediately afterwards (1980s–1990s).

She traces the changes in images from those of Japan as both modern and traditional to its emergence as an economic giant with two miracle makers that differentiate it from the Western world: the *Kaisha* ('Company') and its *sarariiman* ('salaried employees'). However, the author of the book states that although Japan has achieved much from an economic perspective, its status regarding international relations and foreign policy still seems poor. Suvanto refers to Japan's need to solve domestic issues, such as the generation gap between post-war baby boomers and young people born during the Heisei period, in order for the country to gain a new position in the international society.

Of particular interest is how the author shows that the stereotyped images of the rapid economic growth period are based on old descriptions and pictures and briefly outlines the history of images of Japanese society.

Suvanto concludes that Japan "has been strongly admired and hated—both at the same time." She also emphasizes the contradictions within the images of Japan and the Japanese, attributing the image of a unique Japanese culture and traditions to the world of women and that of a modernized society and high technology to the world of men.

The author's final question is: Are we ready to change our stereotyped images of the Japanese, and if so, how? This wonderful book provides several valuable clues to answer this question.

By Yoshinori Shiozawa

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Fukuda, Jun. 2012. *The Evolution of Corporate Governance and the Japanese Economy*. Kyoto University Press, Kyoto.

Corporate governance is currently a major problem that requires rapid reform. Japanese enterprises have many specific problems related to corporate governance; a typical example is the Olympus Corporation scandal. Some aspects of this problem are closely related to what is called “Japanese-style business management.”

Many papers and books have discussed the study of corporate governance, but most of them perform analysis from the legal or organizational points of view. Fukuda's book is one the first to attack corporate-governance problems from an economic point of view. The performance of all listed companies with certain characteristics is examined using a sound econometric method. Do different forms of governance result in any differences in corporate behavior, such as employment adjustments, dividend rates, and anti-takeover defense measures?

Except for a few interesting findings, the results obtained are rather negative. There are no clear facts to be noted, but this is not a failure of Fukuda's work. The negative results mean that form of governance does not have any significant influence on the firms' performance and behaviors. In view of the complexity of the business enterprise, it is quite reasonable that various forms of governance are sustainable in particular environments, both internal and external. If Fukuda's result is accurate, we may think more freely about forms of governance and related questions.

The variety of governance forms and their evolution is one of most interesting topics to study within evolution-ary economics. Fukuda has just started the research, which will be developed by either him or other researchers. The present book is a good starting point.



By Ryoko Sakurada

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Old Places (2011), directed by Royston Tan.

Singapore is an ever-changing society. Singaporeans often laugh at their hasty mentality as *kiasu*, which means “very anxious not to miss an opportunity.” The speed of the Singapore Mass Rapid Transit stations’ escalators is twice as fast as those in hectic Tokyo, and people rush headlong to each destination. Every time I visit Singapore, it is never the same: I always come across glamorous, newly constructed architecture in the city. It is as if continuous change is Singapore’s motto today.

However, that situation may change slowly but steadily. A social movement that values cherishing the “good old days” is currently gaining enormous popularity among Singaporeans. In 2011, the National Library Board project called the Singapore Memory Project (SMP) started to document Singaporeans’ memories in order to preserve the good old days in Singapore. The SMP aims to collect 5 million personal memories, and the latest information indicates that 141,523 memories have been shared. This demonstrates people’s strong desire to preserve the nostalgic “past” as digital data in modern Singapore.

Old Places, a documentary film directed by world-famous local film director Royston Tan and his codirectors Victric Thng and Eva Tang in 2010, is another project that commemorates almost-forgotten but familiar places in Singapore. The film was created by collecting personal stories and memories from the public. People were invited to call in to radio and talk shows and share their personal memories of particular places that would soon be redeveloped and disappear. Narrations of the personal stories are paired with visual images to rediscover the forgotten beauty of ordinary places, such as a coffee-powder factory, a coffee shop called Kopitiam, an old Chinese bakery, a Chinese cleaners, a small Indian stall, a wet market, a playground in an HDB (public flat), and a public swimming pool. These places are very insignificant, small shops and modern places alike. However, callers explain that those places are valuable, since they provide real human interaction; safe, nutritious foods that modern supermarkets cannot provide; and a reminder of their forebears’ great traditions.

Since achieving independence in 1965, Singapore has strived to achieve a government-led, developed nation. In public, it is banned to derive the Singaporean language from Chinese dialects, and old buildings are redeveloped and replaced with high-rise public-housing apartment buildings. The process of nation building is akin to erasing the past and overwriting it with modern ideas. However, the film and Royston Tan’s other works (*881* in 2007, *12 Lotus* in 2008) reveal that *kiasu* Singaporeans never forget their precious, uncontrolled past or their roots. It also shows their determination to transform the nostalgic past into a national heritage.

By Pekka Korhonen

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Otoko wa Tsurai yo (It's Hard to Be a Man), movie series directed by Yamada Yoji, Tokyo: Shochiku. Kuromaru, and Natsuhara Takeshi, *Shin Kurosagi (Black Swindler new series)*, Tokyo: Shogakukan.

As I am now in Kyoto in a rather empty apartment arranged by a friend, I do not have a bookshelf. However, around my bed there is a pile of old Tora-san movies (*Otoko wa tsurai yo*; 'It is hard to be a man'), which were published in 1969–1974, and another pile of *manga* called *Shin Kurosagi* ('Black Swindler new series'), published in 2010–2012. A TV drama and a movie have also been made of *Kurosagi*. Both are long series. The 48 Tora-san movies, mostly written and all directed by Yamada Yōji, were produced in 1969–1995. The making of *Kurosagi* began in 2003 and still continues. Its creators are Kuromaru and Natsuhara Takeshi. Those are two windows on Japanese society that enable the occasional visitor to get a feel for the popular atmosphere in Japan, but from different temporal realities. The windows are similar in many ways despite the passage of time, but the societies are different. These are different artistic creations by different people, and methodologically, to compare them with each other would be like comparing potatoes with carrots. Notwithstanding, both have grown in the same social soil, both are commercial successes directed toward adult audiences, and both have something to teach us about Japan.

The protagonist is similar in both series: an orphaned, single man who never has regular employment and earns his living on the partly illegal and dangerous outskirts of ordinary society by relying on his own skills. They represent the archetype of the unbound male hero, whose life is dispensable and who for this reason is free to serve the common good. Tora-san (whose name means 'Mr. Tiger'; the role is played by Atsumi Kiyoshi) peddles miscellaneous goods on street corners, sometimes being driven away by the police. The Black Swindler's surname is Kurosaki, but his given name remains unclear. His life purpose is to destroy other swindlers with the same tools that they use against ordinary, honest people. This abnormality of Tora-san and Kurosaki creates an effective *Verfremdung* (distancing), which Berthold Brecht considered to be a key element in his theory of masterful plays. The protagonists' abnormality illuminates the state of the normal society by standing systematically in contrast with society throughout both series.

Both protagonists meet women but are denied any close relationships, even the most intimate, sexual ones. Their total freedom is balanced by this tragic element, which turns their characters into moral ones. Although the characters are rough and often impolite, they serve as a moral force by correcting and healing various ills and immoralities in society. Over the 40 decades that temporally separate the works, there seems to have been no change in the high value placed on personal morality in Japanese popular culture. However, a clear difference has emerged in terms of the intimate aspect of care. Even grown-up males need care, not only children and the elderly. In this context, care especially signifies love and emotional support, and further, food is a good symbol for love. Care for Tora-san is provided by his sister, brother-in-law, uncle, and uncle's wife. Tora-san regularly visits them once or twice yearly, and they worry about him all year round. Although it is not an ordinary family, it nevertheless is a family, and the family is strongly advanced as the ultimate social ideal in the movies. In *Kurosagi*, the family is almost irrelevant. It exists as a memory in occasional reminiscences, but in the protagonist's present, care is provided by *cafés* and *kombini* (convenience stores), which secure Kurosaki's meals, which especially include anything containing large amounts of sugar. He consumes sweets as his main source of nutrition. A possible love interest is his neighbor Tsurara-chan, a female university student. She often takes care of Kurosaki's cat but never of Kurosaki himself; he prevents that by treating Tsurara-chan badly. Care provided by the cat is hardly shown, though it is implied. His main care has thus become commercial, impersonal, and chemical; the huge amounts of sugar soothe Kurosaki's loneliness. Family is no longer a necessary institution to maintain acceptable levels of personal happiness in Japan.

If the concept of the public is considered from an interpretative perspective, a conspicuous feature in Tora-san movies is the absence of the state. A shade of its existence appears in the form of the occasional policeman, but no direct state presence is ever seen. Only society exists, composed of honest, sometimes unlucky, but always hard-working people. Active, small-scale, private entrepreneurs form the economic basis of this society, where neither classes nor class conflict exists; there is ample equality, fairness, and mutual trust in this society. In *Kurosagi*, the state is constantly present in the form of laws, policies, and officials trying to administer a somewhat reluctant population. People are divided into three castes rather than classes: rich people with secure life arrangements, ordinary working people, and miserable people who have fallen out of regular employment. The castes appear hereditary; only downward movement can take place. People accept this unfairness of life, and thus, there is no caste conflict. Swindlers act in all walks of life, milking money out of all castes. Swindlers highlight the fact that fairly high levels of trust remain in Japanese society, because without it, their activity would not be as easy as it appears to be. *Kurosagi*'s society has a black lining around it, not a golden one (as in the Tora-san narrative); nevertheless, the depiction assures the reader that Japanese society is still basically healthy and functioning well.

The most significant differences between the works are reflected in their concepts of the larger public, namely, the international sphere. In the early Tora-san movies, the world was synonymous with Japan. People would travel "long distances" to Kyoto, Kyushu, or Hokkaido, and all of the people there are Japanese. Only in the first movie, two foreigners made a quick appearance. It is like the Edo period brought to the 1960s and 1970s; this is underlined by many of Tora-san's dreams, in which action takes place in an Edo setting. *Kurosagi*'s world is international; although he himself never travels to America, other people go there, and swindling techniques are also transferred from there to Japan. Kurosaki understands English and speaks fluent Chinese, as some of his activities take place in China and Taiwan. Chinese and Iranian people also live in the same building as Kurosaki and Tsurara-chan. The world has opened up in 40 years, and the world has permeated deep into Japan.

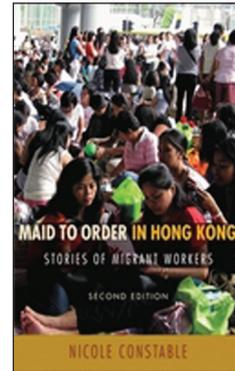
The plot of Tora-san stories is pure comedy. People act spontaneously according to their individual natures and quarrel with each other (occasionally furiously), but they face difficulties together as a group, and bad moments soon dissolve into laughter and merriment around the dinner table. It is a fair and equal world, where the levels of personal and social security are high. Development clearly takes place, as the characters display increasing levels of affluence even within a short period of 5 years between the movies; this makes the temporal perspective future-oriented and optimistic. A conspicuous aspect of *Kurosagi* is that laughter is missing, or if it appears, it is not happy laughter. In terms of narrative forms, these *manga* are still classified as comedies, because the punishment of a swindler is morally justified, and the narrative invariably contains moments of cooperation between the protagonist and other people. Notwithstanding, the narratives always contain tragic elements, and the satisfaction derived from them comes from intellectual understanding rather than emotional happiness. Tragedy is a plot type that is conducive to learning, not enjoying. Japanese society is affluent, but in a sense, it has stopped moving. There is a constant drizzle of individuals falling like raindrops from the upper castes to the lowest one, but otherwise, the temporal perspective is standing still. The past—with its intimate, happy, and secure family life—has gone, never to return, while the present means holding fast to what one has already acquired and trying to avoid the ever-present possibility of falling downwards. There is no specific future promise of changes for either the better or the worse—only a continuation of the present as an eternal moment.

Changes in the real economy and society are clearly displayed in these two popular series of Japanese social narratives, and the mood has changed from an optimistic comedy to a more pessimistic and intellectual one, but the levels of ethics, ideals, and social trust are still very high in both. Both series provide good entertainment and material for late-evening research on Japanese society and its history. I recommend both.

By Mire Koikari

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Constable, Nicole. 2007. *Maid to Order in Hong Kong: Stories of Migrant Workers*, Second Edition. Ithaca: Cornell University Press



Nicole Constable's *Maid to Order in Hong Kong* is an ethnographic study of female migrant workers whose transnational movement and mobility challenge our assumptions concerning women, domesticity, and the public sphere. In the first edition (published in 1997), Constable focused on Filipina domestic workers; in this 2007 revision, her updated analysis includes Indonesian women, another group whose migratory movements are becoming significant across Asia. On the bases of numerous interviews conducted with domestic workers, Constable offers an excellent example of feminist ethnography wherein the voices of the marginalized and forgotten illuminate the complex workings of power in the globalized world.

Constable offers a series of analytical arguments that challenge us to rethink and reexamine questions of gender and power. As elaborated in the first chapter, preexisting studies of domestic workers have tended to portray these women as either "victims without agency" who are at the mercy of their employers or "working-class heroine[s]" who resist their employers' abuse. Stepping away from depictions of female victimization and the "romance of resistance," Constable urges the reader to examine the full range of responses expressed by women, from resistance to acquiesce to subversion, and sources of oppression ranging from employers to states to recruitment agencies. The subsequent chapters offer fascinating vignettes that are pleasurable to read and instructive to ponder. Despite the multitude of difficulties they face, these domestic workers empower themselves through humor and other forms of small-scale resistance. Nonetheless, their desire to establish professional credibility often leads them to pursue self-regulation, which reinforces the disciplinary mechanisms of their bodies and emotions. Far from being localized stories, these vignettes are a part of globalization, under which domestic workers' pronouncements and behaviors are inevitably intertwined with larger political and economic systems.

Rich, detailed, and dynamic, Constable's book provides occasions to consider globalization from critical perspectives and to enrich our understanding of the domestic versus the public through numerous examples (and wonderful photos) gathered at ground level. As globalization intersects with localized workings of gender, class, and race, the sphere of domesticity—where these migrant females continue to toil—becomes a politicized terrain full of possibilities and constraints.

By Neil Gilbert

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Sipila, Jorma, Repo, Katja, and Rissanen, Tapio, eds. 2010.
Cash-for-Childcare: The Consequences for Caring Mothers.
Cheltenham, UK: Edward Elgar.

The Nordic welfare states are well-known for their extensive policies in support of working families with young children, particularly their long-standing state-subsidized daycare programs. In recent times, a new social benefit has been introduced, which offers support for children's care at home rather than in subsidized daycare centers. Analyzing this new approach, *Cash-for-Childcare: The Consequences for Caring Mothers* poses the question: "Should the state pay mothers for caring for their children at home?" In doing so, it examines how different schemes operate in several countries, the arguments for and against this type of policy, and how these policies affect mothers' daily lives.

These schemes recognize the value of informal care and the provision of choices to families so that they can arrange care on their own terms. At the same time, they give governments an affordable and flexible option for the administration of subsidized care. Yet, some argue that these schemes reinforce traditional gender roles and diminish female participation in the labor force.

Cash benefits are seen as fairer to families who do not utilize state-subsidized daycare. This book reports on research regarding how beneficiaries of subsidized home care perceive this program as compatible with the best interests of their children, as it facilitates parent-child attachment and gives them the chance to get to know their children better. Home care may also be interpreted as a protest against working life—an opportunity to escape the "rat race" of the market economy.

While home care offers mothers more time with their children, there is some fear that the benefits appeal disproportionately to immigrant women, who find it difficult to obtain paid employment (and when they do, their jobs are often low-paying). The declining numbers of immigrant children in public daycare might hinder their integration into Nordic societies.

Comparisons among cash-for-childcare schemes in Finland, Sweden, and Norway reveal considerable diversity in how benefits are constructed, how much compensation they provide, for whom, and to what end. Central issues in assessing cash-for-care schemes include how they affect children's rights to early-childhood education and the effects of increased informal home care on gender equality. The latter highlights the need to increase fathers' share of care work.

By Hervé Polesi

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 Pfefferkorn, Roland. 2012. *Genre et Rapports Sociaux de Sexe*
 (*Gender and Social Relations between the Sexes*), Lausanne:
 Editions Page 2.

After his previous work (Pfefferkorn, Roland. 2007. *Inequalities and Social Relations. Relations between Classes and Sexes*. Paris: La Dispute. [*Inégalités et Rapports Sociaux. Rapports de Classe, Rapports de Sexe*]), Roland Pfefferkorn again tackles the subject of social relations between the sexes in his book, *Gender and Social Relations between the Sexes* (*Genre et Rapports Sociaux de Sexe*). Here, the author presents a study of concepts created by various forms of feminism over the years, starting with critical feminist sociology. It is neither a catalogue nor a dictionary. The well-reasoned narrative follows a historical and theoretical path, as suggested by the titles of the book's four chapters: "Break with Naturalism," "The Invention of Gender and its Polysemy," "Gender and its Limits," and "Sexual Division of Work and Social Relations between the Sexes." Moving quickly from one concept to the next, Pfefferkorn presents an extensive but operational bibliography that provides readers with the tools and resources to allow them to disagree with him if so inclined. As such, the book aims beyond mere instruction.

Following the emergence of gender studies and the trajectories of the terms "gender" (globally) and "genre" (in French-speaking countries), we can review current issues concerning the use of these subtle terms. The difficulties presented by the term "gender" reflect the tendency of investigators in social studies to be satisfied with conceptual vagueness; by redefining the social relations between the sexes, both Pfefferkorn and other French- and English-speaking authors provide clarification. This redefining is the book's main goal, as the genealogy of notions establishes critical thinking regarding the current and intended future states of the framework of gender studies. In circumstances in which actors with unsympathetic interests and various theoretical approaches all claim to speak the same language, Pfefferkorn's book is essential reading.

