

「香港長遠社會福利規劃」研究  
A Study on the Long-term Social Welfare Planning for Hong Kong

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# **A Study on the Long-term Social Welfare Planning for Hong Kong**

## **Summary Report**

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The welfare system in Hong Kong was developed after World War II. In the past six decades, the local social welfare system has shown a continuous development and the needy have been granted the necessary aid. The growth of various kinds of social welfare services has also contributed tremendously to social stability.

The white paper on social welfare issued in 1965 started the long-term planning of the government in this aspect. After the government had released the white paper on Social Welfare Aims and Policies in Hong Kong in this particular year, subsequent white papers were issued in 1973, 1979 and 1991, setting targets and concrete plans for the social welfare development of Hong Kong in the future. Besides the white papers, the government formulated "program plans" in the mid-1970s for specific services, such as rehabilitation, youth services and elderly services. At the same time, "five-year plans" were set up to keep social welfare developments under review. Recently, such planning has been made by "annual consultations" on the related sectors. The above planning mechanisms have played a positive role in the different stages of development, yielding recognized results.

However, all social systems should keep up with the times and adjust to changes to facilitate continuous growth and development. As a highly-developed and densely-populated international city, Hong Kong has experienced increasingly complicated social problems and greater challenges to its social welfare system. The change in the political and economic environment, the structural change in population, the expectations of the citizens on social welfare, the contributions made by the welfare budget, the core social values of welfare as well as the demands on the quality of welfare services can all have major affects on the long-term planning of social welfare policies.

Developing a sustainable social welfare system is the long-term target of any society. The social welfare planning in Hong Kong also needs to be reformed to establish a new system catering to the social demands of the present and, at the same time, addressing the social benefits in the long term with broad and visionary

considerations. The Chief Executive, Donald Tsang Yam-kuen, in his last Election Platform agreed to study the long-term development planning for social welfare in Hong Kong<sup>1</sup>, and has tasked the Social Welfare Advisory Committee (SWAC) to lead the exercise. SWAC issued an invitation for written submissions to related sectors on the above subjects and sought public opinions.

The Hong Kong Federation of Youth Groups (the federation) is one of the territory's largest non-profit, youth work organisations and deeply concerns itself with the development of social welfare services. The long-term welfare planning which has profound implications on our societal benefits deserves our attention. Social welfare planning involves an engagement process. In order to solicit opinions of the public and, in particular the younger generation, regarding future welfare planning, this study has been conducted through an integration of relevant data and measurements from mega trends in the current social context, interviews with experts and academics as well as a territory-wide survey of Hong Kong people. It is hoped that this study will provide insights of the issues at hand and will result in recommendations which could be suggested for future welfare planning.

A synthesis of observations from mega trends in the current social context is complemented with literature reviews to anticipate future trends and its implications to social welfare planning.

Interviews with academics and specialists were conducted in the period between May and July 2008. 11 persons were interviewed, among them academics, representatives from social welfare service organizations and social workers. Their observations and opinions regarding the long-term social welfare planning for Hong Kong were sought.

In order to gauge the attitudes and opinions of Hong Kong people regarding the future development of social welfare services, a telephone survey was conducted between the 3rd and the 11th of July, 2008. By random sampling, 1019 eligible Hong Kong people aged 15 or above were successfully polled, yielding a response rate of 67%, with a standard error within  $\pm 1.6\%$ .

This chapter summarized the major findings and analyses of the survey, related discussions and recommendations for reference.

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<sup>1</sup> Mr. Tsang Yam-kuen, in the public forum for candidates for the Chief Executive, said he would review the social welfare system. See: <http://www.takungpao.com.hk/news/07/03/02/>

## Discussion

- 1. The current welfare planning mechanisms are outdated, and fail to meet the ever-changing needs of society or have a long-term static horizon and vision. Therefore, there is a pressing need to re-establish long-term social welfare planning.**

The social welfare planning in Hong Kong started when the first white paper on social welfare was published in 1965. Reviewing current welfare planning, it is found that the social welfare planning mechanisms primarily work in four ways, which are: policy white papers, program plans, five-year plans and reviews, annual consultations as well as prioritizations of service needs. However, these policies or measures have been proposed or enacted only to act in response to present problems in society, and long-term planning is unable to cater to upcoming changes in society. Hong Kong needs a more macro and forward-looking planning mechanism that would steer its social welfare development steadily in the long term.

Summarizing the opinions of some experts and scholars interviewed, this study raises four main problems of the current welfare planning system. First, owing to rapid societal changes, the services provided in the past may not suit the present Hong Kong society. Second, the current welfare system lacks long-term visionary planning and only focuses on short-term plans to solve present problems. Third, higher public demand for social welfare and the fact that many new service providers have been set up make it necessary for the government to reconsider their welfare plans. Fourth, a planning mechanism must meet the ever-changing needs of society. There are some factors affecting the planning mechanism, such as service updates, the uniqueness of a district and the demand for public participation.

Social welfare must keep abreast with the trends and the pulse of society. The new planning system should embrace the long-term vision of development, and also have enough flexibility to address social problems at a strategic level.

- 2. The government should shoulder a greater responsibility for the provision of social welfare, play an active role as a supporter, and create favourable conditions for social welfare development. Non-government organizations (NGOs), business sectors, individuals and families are also responsible for bolstering social welfare development.**

According to the telephone survey, over 60% (63.1%) of respondents agreed that the provision of social welfare was the responsibility of the government ultimately. More than 75% (76.5%) said the business sectors should support social welfare services. In addition, when they encountered daily life problems or when they needed to seek counselling services, 60.5% and 44.6% of respondents, respectively, would like to choose personal resources to fix the problems respectively. Government facilities are apparently not what they will rely on.

Experts as well as related studies all point out that social welfare provision is not solely the responsibility of the government. The NGOs, business sectors, individuals and families should also play a significant part in social welfare. Their roles are interdependent.

As for the government, it plays a significant role in promoting the effectiveness of social welfare services. Besides acknowledging the core values of social welfare, the government should create a favourable environment for the development of social welfare. The government can also formulate social welfare policies through studies, evaluations of service necessities, public consultations, etc. Moreover, it is responsible for coordinating social welfare policies with other policies, setting the related regulations and weighing the possibility of the effects of various policies on society.

NGOs are important allies of the government because they provide social welfare services. As these NGOs do not work under the limitations of bureaus or ranks like the government, they can respond more flexibly to the needs of society and explore new initiatives. Furthermore, the NGOs and the government can work together to evaluate the necessity of services, set service priorities and formulate welfare policies. In short, the NGOs can respond to the new social issues and needs with more flexibility and can make vital improvements in the social welfare sector in Hong Kong.

The business sectors should take part in social welfare not because they have adequate funds or human resources, but because it is their responsibility to make contributions to society as corporate enterprises. On the other hand, the government should provide further incentives or implement concrete measures, such as tax concessions and other popular measures to encourage the business sectors to engage in social welfare services.

With regard to individuals and families, the telephone survey illustrated that “family” is still the core unit of society. While encountering problems, most respondents said they would seek help from their families. They also tended to solve their daily problems with their “personal resources”, showing little reliance on the government. Social welfare favours the community and family care so that people in need can live in a community they are familiar with, and receive the care of their family members. This positive concept should constantly be encouraged.

In conclusion, the government plays a vital role as a provider and activator in social welfare development. It should take up major responsibilities for setting long-term development visions, encouraging the NGOs and the business sectors to take part in welfare services, as well as strengthening the support of individuals and families.

### **3. Related sectors should tap social resources together to facilitate the sustainable development of social welfare services.**

The rapid change in society, the increasingly complicated social problems, and the greater demand of the public on social services make the exploration of welfare resources very important. The financial resources for social welfare are mainly from tax. As a result, the development of social welfare is often influenced by the change in the financial status of the government. Experts interviewed pointed out that financing is an important factor for the sustainable development of social welfare. Is the private sector willing to pay more tax to improve the social welfare services? How can the government and the private sector share the responsibility of financing social welfare services? These problems need long time discussions to reach a consensus. These problems are also the main concern that must be addressed for the future welfare planning.

In view of the rising trends of welfare expenditure, 72.7% of respondents in the telephone survey disagreed with the Government cutting the welfare services. Moreover, 39.8% and 37.5% disagreed on increasing welfare service fees or increasing tax respectively. On the other hand, 28.9% agreed to increase welfare service fees and 29.3% agreed to increase tax. Besides, 56.5% agreed with the principle that, if one can afford it, they should pay for the welfare services themselves.

Increasing tax and service fees are the primary ways to acquire welfare financing. The survey showed that Hong Kong people have different attitudes to the above methods of getting resources. In-depth discussions and related explorations should further be held. Furthermore, once the Lump Sum Grant subvention mode for the NGOs was introduced, those organizations have become more active in tapping resources from the private sector. Further development in this aspect relies on the joint efforts of the government, the commercial and the private sector.

**4. Enhance the professionalism and autonomy of the social service organizations; the development of human resources and the monitoring of services are of paramount importance in welfare planning.**

To encourage the public to support and participate in social welfare services, it is important to increase the transparency of the social service organizations and their quality of service. The public has higher expectations on the services that can be delivered in social services. Not only do they expect the government and the NGOs to provide relevant services of an outstanding quality, the public also expects the government and the NGOs to provide services in a cost-effective manner, with higher transparency and accountability.

Most NGOs have kept improving their management, and set up principles and procedures to guide their operations by their own initiatives. To help upgrade the monitoring practices of the NGOs, the social welfare department has set 16 "Service Quality Standards", each of which is elaborated by a set of "Criteria" and "Assessment Indicator". These requirements specify the standards that the service units are expected to attain.

The introduction of the lump-sum grant system grants much autonomy and freedom of development to the NGOs. Indeed, in the wake of its implementation, the organizations are under close scrutiny of the government and the general public. The system allows these organizations to deploy their resources to respond to the service needs, while at the same time they need to face the pressure of subsidy cuts due to the unsatisfactory financial status of the government. As a result, a great internal tension has been built up in these organizations and the morale of front-line staff has been hampered. This situation deserves our attention.

The development of human resources is critical to the upgrading of services. At present, social workers are required to possess professional skills and knowledge at different levels, so that they can work efficiently with the recognition of the public. The new problems that arise also make social workers aware of the need to get the support of other professionals, such as healthcare practitioners and psychologists. That is why some experts interviewed pointed out that the shortage of healthcare practitioners has directly affected the quality of services.

Therefore, long-term social welfare planning should cater to the trend of social welfare development so as to estimate the size of manpower necessary in different professions in the future. The subvention and monitoring mechanism should also be made transparent and efficient to facilitate flexible resource deployment and prompt response to social needs.

**5. The uniqueness of a district must be incorporated in welfare planning and resource deployment should be facilitated.**

The overall direction and strategy are of course vital factors of welfare planning. Nevertheless, the uniqueness of the local community must also be considered. The characteristics, financial status, social problems and service needs of the public vary with districts. While incorporating welfare planning, the government needs to incorporate a particular uniqueness to understand the needs of a specific local community, facilitate local resource coordination and manpower cooperation, and provide the local community with tailor-made welfare services.

A scholar interviewed noted that the characteristics of different districts vary so the planning mechanism should be localized as well. An example was used to illustrate that family services perform different duties in Tin Shui Wai and Central West Districts. So the government should first look into the problems and the needs of the district concerned while making service plans for the future. This is an important subject for welfare planning. Furthermore, an expert said the local needs should be reported to the central government for effective solutions. The central government and the local community should strengthen their communication and discussions so as to enable better collaboration and coordination of facilities.

In short, the future welfare planning mechanism should be flexible and ready to respond to different needs. It should also be able to deploy resources efficiently to fix local demands, and encourage innovative services.



**6. Family is still the core unit of a society; it should be given due assistance so that they can play their support role well.**

86.1% of respondents in the telephone survey said they would first seek help from their families while encountering problems. 60.5% said they would use their “personal resources” to solve difficulties in their daily life, and 44.6% said they would seek counselling in the same way if necessary. The personal means used by respondents refer to the help from their family members or relatives in many cases, showing that family is still a significant support system of the respondents.

However, with the change in family structure, family relationships have often been undermined, thus weakening the supporting role of families. Families in Hong Kong are further challenged by economic and social changes, which have given rise to issues like single parent families, family violence and unattended children. The rapid changes in society have also made it stressful and helpless for families to solve problems like elderly care and child poverty.

Family is the vital core unit in society. The future welfare planning should strengthen support for the family, and set up measures to create an environment helping to relieve family stress, such as day care children centres and family-friendly work practices. The government should also offer incentives and substantial support measures so as to encourage families to take care of their needy members.

**7. Public participation and discussion on social welfare should be encouraged and acted up on when found useful.**

Welfare planning is a process in which public participation and the opinions of the people of Hong Kong greatly affect such planning in the long term. The comments of the users should also be thoroughly looked into. A scholar that was interviewed said welfare planning was a consultation process that involved stakeholders on various consultations, including government officials, the business sector, experts or scholars, service providers as well as users. Their participation in identifying welfare service needs and assessing policy performance could make the services accommodate to social needs better.

Welfare planning must adopt a bottoms-up approach, and acquire active participation from the people. The government should broaden public participation

on social welfare planning so that stakeholders can take part in discussions and express their opinions at different stages of planning. This practice can increase policy recognition in effect.

## **8. Mega trends in the current social context should be considered in long-term welfare planning.**

The white paper on social welfare issued in 1991 elaborated on the principle of social welfare in Hong Kong. It stated that social welfare was not only provided to take care of disadvantaged people, but also to strengthen the ability of individuals, families and communities, to promote active participation in society, as well as to build up a caring, harmonious and just society. The above vision shows a positive concept of welfare, which is still worth thinking about nowadays. It can also be a good reference for welfare planning in the future.

Over 80% (81.1%) of respondents in the telephone survey agreed that social welfare is the basic right of citizens. Moreover, 67.5% said social welfare helps to maintain social stability, showing their recognition for social welfare.

However, welfare development is not only related to overall social change, but is also affected by other political and economic activities. In the future, Hong Kong will face severe challenges from economic globalization, democratization, polarization of society and an aging population. The complicated political, economic, and social problems will greatly influence social welfare services.

In the following part, there will be an analysis on how social changes will influence welfare planning. The social changes are related to seven aspects: population features, family structure, integration of the Mainland and Hong Kong, economic restructuring, information technology, social science advancement and civil society.

### **(1) An aging population increases the pressure on social welfare**

Hong Kong is facing an aging population problem. It is expected that 25 years from now, there will be one elderly person among four people in Hong Kong. With a rising elderly population and dropping birth rate, the elderly dependency rate will

increase steadily. At present, two elderly people are supported by 12 working people on average. It is estimated that 25 years from now such a ratio will be increased from two elderly people to five working people only, illustrating that the burden of taxpayers will be increased considerably.

The increase in elderly population and elderly dependency rate will constitute a heavy burden on medical and social welfare expenditure. It is also expected that the elderly people will have an increasing demand on social security, hospital services and community care. Future welfare planning must give adequate consideration to the above service demands

## **(2) Undermined function of the family weakens the effectiveness of supporting welfare services**

The form of family has changed due to first marriage postponement, increasing number of divorces, rising number of one-person or two-person households and the polarization of household income. The structural change in the family has weakened family relationships, and thus the supporting function of family members. At the same time, the internal tension within a family has risen, giving rise to many family problems like family violence, intergenerational poverty, parenting problems, etc. These issues have created a heavy pressure on family services.

Family is still the core unit in policy formulation. But the structural disintegration of family, together with the undermined family function, will make it necessary to strengthen the role of family in future welfare planning. Moreover, it is also necessary to assess the problems caused by the increasingly complicated forms of families and offer support based on their needs.

## **(3) Frequent cross-border activities affect the development and planning of welfare service**

Cross-border activities have become more frequent with the economic integration of the Mainland and Hong Kong. The number of Hong Kong people working on the Mainland, Mainland children studying in Hong Kong, as well as cross-border marriages is steadily increasing. Cross-border activities and migration have caused different adjustment problems. While making policy and welfare

planning, there should be supportive and preparatory measures in these aspects. Cross-border and cross-bureau co-ordinations should be made in time to facilitate service development and find solutions.

**(4) Economic restructuring affects the provision of welfare services**

Economic restructuring acts as a great blow to the working force with low educational levels and skills. It is relatively difficult for them to get a job. Furthermore, the growing disparity between the rich and poor has hindered social mobility. The global economic crisis will also influence social welfare services.

The economic downturn will affect the financial status of the government. The shortage of welfare resources thus caused will not only limit the deployment of resources, but also directly or indirectly affect the provision of welfare services. The applications for Comprehensive Social Security Assistance will increase in particular, creating pressure for the expenditure concerned.

**(5) Innovations in information technology changes the mode of service provision**

The growth in information technology and the use of the Internet can have far-reaching effects. The Internet has become an important means for information transmission, making daily life extremely convenient. On the other hand, it has caused some social problems like a digital divide, Internet addiction, Internet crime, etc. The era of the Internet has also changed the mode of service provision and the way of communication with service users. The situation will cause a reform in welfare services, with its extent yet to be determined.

Welfare planning should keep up with technological development. For example, it is possible to provide certain welfare services, such as online studies or online counselling, through information technology. However, it is also necessary to help and guide service users, especially the young people, to properly use information technology and build up a healthy Internet culture.

**(6) The growth of civil society increases the demand of the public to participate in public affairs**

With the growth of civil society, the general public expects higher transparency from the government and higher accountability from public organizations, so that more efficient and better cost-effective welfare services can be provided. The active participation and involvement of the people can also help to build up their sense of belonging to society and promote prosperity.

The greater public demand for participation in public affairs has made it more important for the government to make policy information more accessible, increase the channels of communication and sharing, as well as let the public take part in the process of policy formulation in long-term welfare planning.

**(7) Improvement in social science and medical science help to identify problems on time and plan services ahead.**

Advancements in social science and medical science have made it easier to discover new problems or phenomena, make assessments and prescribe treatments. The previously unknown or unnoticed psychological or mental developmental disabilities are gradually uncovered and understood. For example, a learning difficulty has been distinguished from an intellectual disability. Paranoia and depression are now properly identified. Social and medical science can also help to discover problems at an early stage and correct misperceptions. The advancements are especially meaningful in particular for young people with developmental disabilities, and holistic and tailor-made services can thus be provided. The above developments can indeed greatly affect social welfare planning.

Social science and medical science improvements increase the understanding of many newly emerged problems, and they can help to discover new methods and treatments to deal with them. The trend manifests the need for cross-professional coordination to respond to latest social issues in future welfare development.

## **Recommendations**

**This study examined the development of Hong Kong's social welfare planning and the current provisions of social welfare services. Moreover, this study also pointed out that past welfare planning processes were outdated and lacked the flexibility to cope with the ever-changing needs of society. The federation is strongly supporting the idea of long-term social welfare planning for Hong Kong, initiated by the Social Welfare Advisory Committee. Such long-term welfare planning enables sustainable development in the social service sector in the coming decades, while maintaining enough flexibility to cater for forthcoming changes in society.**

**This study had been conducted through an integration of relevant data and measurements from mega trends in the current social context, interviews with academics and specialists as well as a territory-wide survey of Hong Kong people. The following eight points are concluded for the consideration of long-term welfare planning:**

- (1) Affirm the importance of the formulation of long-term strategic welfare planning.**
- (2) The Government should have a clear and definite role in welfare planning.**
- (3) Should address the problem of welfare resources keeping in mind the implication of maintaining the sustainability of welfare services.**
- (4) Enhance the professionalism as well as the autonomy of non-governmental organizations to provide welfare services.**
- (5) Welfare planning should consider the uniqueness of a district and also facilitate the deployment of resources between the centre and the district.**
- (6) Strengthen family solidarity and provide needy families with services.**
- (7) Broaden public participation and discussion in welfare planning.**
- (8) Monitor the trends and respond to the needs of society.**

**Welfare financing is of paramount importance in long-term welfare planning. In view of the continuous increase on the welfare budget, should resources for social welfare all come from the government or can other parties, such as the business sector and the individual also contribute? How can we define the concept of an able person paying the welfare service fee for himself? The above questions should be the focal point of long-term welfare planning.**

**The future development of social welfare is not solely the responsibility of the Government; non-governmental organizations and business sectors all act as important partners collaborating with the Government in the welfare process and to develop resources. With the cooperation amongst the different stakeholders, it might help the sustainable development of social welfare.**

**Based on the analysis above, we have proposed a Three-Tier Planning Mechanism for long-term welfare planning which includes Mission, Vision and Strategies; Monitoring, Implementation and Deployment of Resources; and District Planning, Collaboration and Feedback. The function and the review frequency should be spelt out clearly at the three different stages.**

**Proposed Three-Tier Planning Mechanism**

	<b>Mission, Vision and Strategies</b>	<b>Monitoring, Implementation and Deployment of Resources</b>	<b>District Planning, Collaboration and Feedback</b>
<b>Review Frequency</b>	<b>Every five years</b>	<b>Biennial</b>	<b>Annual</b>
<b>Function</b>	<ol style="list-style-type: none"> <li><b>1. Mission, Vision and Value Statements</b></li> <li><b>2. Policy Objectives and Strategies</b></li> <li><b>3. Overall Planning, Development and Service Provisions</b></li> <li><b>4. Strategies for Deployment of Resources</b></li> </ol>	<ol style="list-style-type: none"> <li><b>1. Planning Service Need and Service Provision Profile</b></li> <li><b>2. Attainable Objective Indicators, including planning for specific services, development and provision</b></li> <li><b>3. Service Monitoring including standard measurement, quality of service and the transparency of welfare agency</b></li> <li><b>4. Deployment of Resources, including manpower, multi-discipline and premises</b></li> </ol>	<ol style="list-style-type: none"> <li><b>1. Strategic Plan to meet the District Needs</b></li> <li><b>2. New Initiatives</b></li> <li><b>3. Deployment of Resources in the district and Collaboration</b></li> <li><b>4. To feedback the District problems to the Centre and to also facilitate communication between the Centre and the District</b></li> </ol>



**Based on the proposed planning mechanism aforementioned, we recommend that a territory-wide social research is needed, complemented with sufficient data and consolidated information to keep abreast with the social trends that will help steer social welfare development in the long term.**

**Besides, in the planning process, we recommend ensuring an open and fair room for public participation. It is also important to strengthen the consultations among the welfare agencies so that our welfare policy and program plan can echo the needs and expectations of the community in general.**