

THE POLICYMAKING PROCESS FOR THE SOCIAL SECURITY SYSTEM IN TAIWAN: THE NATIONAL HEALTH INSURANCE AND NATIONAL PENSION PROGRAM

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This paper examines the policymaking process and contents of the two major social security policies of Taiwan in the 1990s. The National Health Insurance (NHI), which was introduced in 1995, was a mixture of success and failure. While it brought about universal health insurance, part of the original objective of creating a comprehensive welfare system through the NHI initiative was not realized. The attempt to introduce a National Pension Program (NPP) in 2000 went through dramatic turns in both policy contents and the prospects for implementation. Though it was originally designed as a modified form of social insurance, a general tax revenue-funded defined-benefit scheme was added as an alternative when a new government came into power. The bill, however, was withdrawn before the actual deliberations began. The author argues that policy legacies and actors, and the interactions of these variables within different policy phases, determined the policy contents and changes.

FROM 1980 to 1995, a total of eleven kinds of social insurance were launched in Taiwan. Following that, the National Health Insurance (a universal health insurance) and Unemployment Insurance were established in 1995 and 1999, respectively. In October 2001, Taiwan began preparations for a further attempt to introduce a National Pension Program. In contrast to the welfare retrenchment seen in the advanced industrialized countries, Taiwan's welfare expansion, as symbolized by these newly established social insurance systems, comes as a surprise to many who have followed its state-led, growth-first developmental path. To understand the political dynamics of its welfare expansion, this paper will focus on the policymaking process leading to the successful establishment of the universal health insurance system in 1995 and the unsuccessful attempt to introduce the National Pension Program in 2000.

The paper consists of four sections. Section I surveys prior studies and discusses the framework of this paper and its significance. Section II reviews the development of social security systems in Taiwan before the 1990s and summarizes the characteristics of these systems. We then discuss the influences that these characteristics subsequently exerted on the social security system reforms in the 1990s. Section III focuses on the policymaking process for social security reform in the

1990s, referring to the National Health Insurance, introduced in 1995, and the abortive National Pension Program in 2000. Finally, based on the analysis of these two cases, Section IV attempts to provide a framework for understanding the institutional characteristics and policymaking process of Taiwan's social security system.

I. FROM RESIDUAL WELFARE STATE TO POLITICS OF SOCIAL SECURITY

In order to clarify the position of this paper, it is helpful to briefly review prior studies of the social security system in Taiwan.¹ Analyses of Taiwan's social security system are a novel phenomenon. Generally speaking, two trends can be identified from previous scholarly works. One is typified by various studies that analyze both the origin of the welfare state in Taiwan and its characteristics (typification of a welfare state). The other, rather than being grounded in welfare state studies, often deals with the political process of crucial policies or policy changes (e.g., the National Health Insurance dealt with in this paper).

Much like studies of the "welfare states" of the developed countries, the development of "welfare" in Taiwan was scrutinized through macro or more complex social welfare approaches. These studies focus on the structural factors, such as demographic composition, the role of families, and stages of economic development, that led to the emergence of the welfare system. Focusing on the historical background, including politico-economic conditions and cultural factors (Confucian culture), is also a common analytical method.² These studies, though based on different perspectives, often arrive at the similar conclusion that Taiwan was a "residual welfare state." According to them, this backwardness was brought about because Taiwan lacked a coherent thinking or ideology on the social security system. Alternatively, they argue that the priority placed on economic development and the adversarial relationship with mainland China led to the haphazard and inadequate development of the social security system. These studies are very helpful in understanding how the social security system emerged in a developmental state like Taiwan. However, they do not provide convincing analyses of policy changes such as the introduction of a single-payer universal health insurance. The idea that changes in the social structure (such as an aging population and increasing demand for health care) led to a programmatic expansion sounds plausible, but provides few hints for understanding the programmatic characteristics (unified system or social insurance-type system). Or, analysis that adopts a political variable in the form of "legitima-

¹ For a more detailed review of prior studies focusing on Taiwan, see Lin Chen-Wei (1999).

² See the following: Lin Wan-I (1990), Goodman and Peng (1996), and Tang (2000) for structural factors and historical background; Jones (1990, 1993) for cultural factors; and Takahashi (2000) for the relation with development.

tion of the political structure” may invite the counterargument that if democracy brings regular and fair elections, this would hamper the further expansion of social welfare since legitimacy can now be ascertained through elections. Therefore, most scholarly works remain unsatisfactory when considering the fact that Taiwan underwent major reforms and seemed to be heading toward the building of a fairly comprehensive social security system during the 1990s.

On the other hand, since the latter half of the 1980s, there have been analyses of the political processes for single policies or programs such as the establishment of the Farmers’ Health Insurance, health insurance reforms, or the introduction of the National Pension Program. These analyses attempt to explain the rapid expansion of Taiwan’s social security system in the 1990s by examining programmatic changes resulting from democratization (the emergence of electoral politics and changes of government), and by studying the policymaking process. They contend that reforms of the social security system, while constrained by the low-contribution (borne by insureds) framework of the system, were intended to extend coverage to societal groups that had previously been excluded from the system, and that the reforms proceeded simultaneously with the process of democratization. Further, electoral politics, which became popular as a result of democratization, as well as the election system itself (single non-transferable vote multi-member electoral system [SNTV-MM]) prompted candidate-centered competition, which in turn led to increasing campaign promises for social policy reforms.

These factors were behind Taiwan’s social security system reforms in the 1990s, and led to the direction of building a unified universal health insurance scheme and a national pension program. Utilizing the new institutionalist approach, these analyses were able to provide relatively convincing explanations of why a social security system with such characteristics was established in the 1990s in Taiwan, where social security policies had received scant attention in the past.

However, most of these analyses deal only with the successful introduction of the National Health Insurance (NHI), partly because of the time-span (the deliberation on the National Pension Program [NPP] took place in 2000), and fail to address other major reforms, such as the pension program. In addition, no comparative analysis has been attempted. Much like for the NHI, there have been active discussions about the introduction of a national pension program since the mid-1980s. Despite the discussions, though, the NPP has not yet been realized and old-age income security remains a major problem for Taiwanese, with the exception of the government employees who receive a rather generous pension. The pension program poses an interesting contrast to the NHI, but is yet to be analyzed. This paper will discuss, applying the institutional approach, the unsuccessful attempt to introduce the NPP, using a comparative analysis with the NHI, and search for the factors that have formed and developed Taiwan’s social security policy.

As is described in Section IV, the analysis here uses a two-axis framework. One

axis concerns the process of policy formation, from the formation of an issue and to its implementation, after going through planning and deliberation in the legislative branch of the government. The other axis consists of factors that influence policy formation, or specifically, policy legacies and actors such as experts, bureaucrats, politicians, and societal groups. In analyzing the political dynamics of policymaking, much of the research has used the motives of various actors and/or their influences, determined by institutions, as variables, and included them in the analytical framework. This, however, is not sufficient for grasping policymaking as a dynamic process. In fact, as will be discussed in this paper, the methods used by different actors to assert influence vary depending on the stage of policymaking. Consequently, the resulting policies have proven to be different from what was expected, or in some cases, the process has not led to policy outcomes. This means that changes in policies can be better understood by introducing conceptual stages in the process of policymaking. The author hopes that this attempt can further the understanding of how social security policies emerge, and thereby contribute to grasping the dynamics of the policymaking process in Taiwan after democratization.

II. THE HISTORICAL DEVELOPMENT OF THE SOCIAL SECURITY SYSTEM AND ITS POLICY CHALLENGES

Taiwan's social security system began with the implementation in March 1950 of Labor Insurance, a general insurance scheme for employees, covering mainly health and work hazards, and had expanded to include a total of sixteen kinds of insurance by 1995 when the NHI was launched.³ The number of insurants was limited at the outset, and even in 1970, after twenty years of implementation, only accounted for 8.6 per cent of the population. In the 1970s, Labor Insurance insurants increased as urban middle-class citizens joined the system, but the decade did not witness the inauguration of any new systems. In the 1980s, in contrast, the number of insurants increased rapidly with the start of eleven new types of health insurance, as well as with the expansion of the coverage of Labor Insurance. As shown by Table I, Labor Insurance insurants swelled by 130 per cent in the 1980s, and the ratio of insurants enrolled in the three major insurance systems accounted for more than 46 per cent of the population by 1990.⁴ The health insurance system became increasingly occupationally based with the launch of the Farmers' Health Insurance in 1985. As a result, a situation emerged in which more than half of the population was excluded

³ For the history of these social insurance systems in Taiwan, see Liu (1980, 1991), Lin Wai-I (1990), Lin Kuo-ming (1997), Sun (1994), Wong (2001), and Lin Chen-Wei (2001). For details of these schemes, see Takahashi (1999) and Lin Chen-Wei (2001).

⁴ The rapid increase in insurants can be explained by the expansion of coverage and the enrollment of imposter workers and farmers via occupationally-based labor unions and agricultural cooperatives. For details, see Huang (1999) and Lin Chen-Wei (2001).

TABLE I
CHANGES IN RATIOS OF INSURANTS TO POPULATION

Year	Government Employees' Insurance (%)	Labor Insurance (%)	Farmers' Health Insurance (%)	Percentage in Population
1955	—	3.43	—	3.43
1960	1.75	4.90	—	6.66
1965	1.92	5.01	—	6.93
1970	2.08	6.53	—	8.60
1975	2.26	9.52	—	11.78
1980	2.44	14.21	—	16.65
1985	3.91	20.97	0.52	25.40
1990	5.29	33.59	7.70	46.58
1993	8.39	38.79	8.14	55.32

Source: Lin Kuo-ming (1997, pp. 68, 92).

from any public health insurance schemes, while the remaining nearly half enjoyed generous medical benefits from occupationally-based insurance schemes.

In the latter half of the 1980s, these general insurance schemes came to face two major challenges: financial difficulties and the protracted plan to introduce some sort of old-age income security scheme. The financial problems were caused by the failure to raise premiums to cope with the expanding range of medical care benefits and the rapid increase in insurants. A sharp increase in medical costs was another factor (Lin Kuo-ming 2000).⁵ Table II shows the financial conditions of various insurance schemes from 1988 to 1997. By the late 1980s, the Government Employees' Insurance scheme was posting deficits, which amounted to NT\$2.8 billion in 1988. Farmers' Health Insurance, a scheme consisting mostly of medical benefits, had been in the red from the outset and the deficits were expected to increase. Labor Insurance managed to attain surpluses, but only because many insurants did not exercise their right to apply for old-age benefits. The reason for this is that many claimed to be active, when in fact they had already retired, in order to secure medical care benefits, as there was no medical care insurance that workers could join after retirement until the NHI was introduced in 1995. According to 1993 data, if all insurants who qualified for old-age benefits had applied, the total benefits would have reached NT\$108 billion, an amount far greater than the year's balance of reserve fund of NT\$9 billion (Lin Kuo-ming 1997, p. 138).

As for old-age income security, government employees (who account for about 6 per cent of Taiwan's working force) are entitled to a lump-sum old-age benefit, up

⁵ Increased medical care costs can be ascribed to natural increases due to the aging population, industrialization, and excessive treatment by medical doctors, as is also seen in Japan. For the role of the medical care industry in Taiwan's medical insurance, see Lin Kuo-ming (1997, chaps. 5, 6, and 7). Medical care benefits under Labor Insurance for fiscal year 1988 accounted for 70 per cent of the insurance's total expenditures.

TABLE II
FINANCIAL STANDING OF INSURANCE SCHEMES, 1988-97

Year	Labor Insurance			Government Employees' Insurance*			Farmers' Health Insurance		
	Income	Expenditure	Balance	Income	Expenditure	Balance	Income	Expenditure	Balance
1988	44,093,270	43,768,870	324,400	6,691,350	9,561,920	-2,870,570	1,242,680	1,524,900	-282,220
1989	56,996,940	52,202,510	4,794,430	7,664,790	11,409,140	-3,744,350	3,989,090	4,533,260	-544,170
1990	70,426,700	58,306,810	12,119,890	9,358,590	13,065,700	-3,707,110	10,652,410	14,392,270	-3,739,860
1991	85,005,570	81,426,930	3,578,640	10,787,890	16,646,280	-5,858,390	13,028,690	19,755,420	-6,726,730
1992	100,199,960	96,742,420	3,457,540	11,854,250	15,525,500	-3,671,250	13,587,120	25,430,690	-11,843,570
1993	119,714,670	110,580,650	9,134,020	13,190,080	17,635,630	-4,445,550	14,221,320	27,884,840	-13,663,520
1994	139,829,600	133,731,020	6,098,580	14,237,830	20,321,930	-6,084,100	14,544,950	31,464,880	-16,919,930
1995	148,747,600	134,189,690	14,557,910	9,232,040	15,877,720	-6,645,680	11,592,240	26,291,400	-14,699,160
1996	140,339,870	122,819,500	17,520,370	8,692,320	14,981,000	-6,288,680	5,624,630	5,711,120	-86,490
1997	145,961,730	143,037,830	2,923,900	9,825,790	16,718,270	-6,892,480	5,682,750	6,293,410	-610,660

Sources: Labor Insurance and Farmers' Health Insurance data are based on Bureau of Labor Insurance, Council of Labor Affairs, *Statistical Yearbook of Labor Insurance, 1998*; Government Employees' Insurance data are based on Ministry of Civil Service, *Statistical Yearbook on Civil Service, 1998*.

* The Government Employees' Insurance was integrated with the Private School Employees' Insurance on May 29, 1999. The figures in this table denote statistics only for the former Government Employees' Insurance.

(NT\$1,000)

to the equivalent of thirty-four months of salary, by the Government Employees' Insurance. In addition, they can choose between a lump-sum benefit of up to fifty-three months of salary or a monthly pension equal to 70 per cent of the pre-retirement basic salary, offered by the Retirement Reserve Fund which all government employees are required to join based on the Civil Servants' Retirement Law.⁶ By contrast, Labor Insurance provides only a lump-sum old-age benefit of up to fifty months of salary. However, old-age benefits or pension programs for other social strata are virtually nonexistent (with the exception of a farmers' allowance program, which is limited in scale). This means that there is a disparity between the non-insured and the insured, and among insureds in different insurance schemes. Compared to the situation with health insurance, the pension issue remains unresolved and unfair.

This quick glance at the social security system in Taiwan up to the late 1980s shows that the system has three major problems: the nonexistence of universal public health insurance covering the whole population; fiscal deficits caused by medical care benefits; and the delay in providing old-age income security for all. In the following section, I will discuss what reforms have been implemented to cope with these problems.

III. REFORMS IN THE 1990s: NHI AND NPP

A. *National Health Insurance*

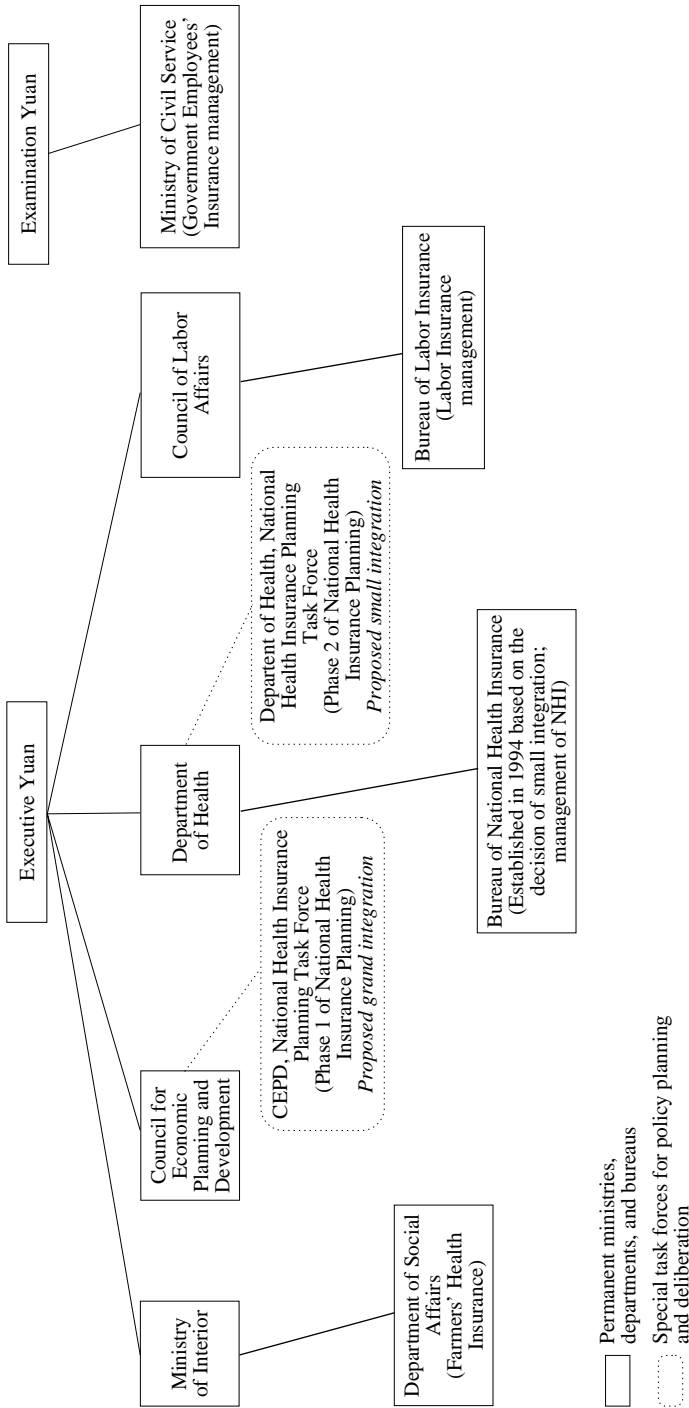
1. *Formation of policy issues and policy planning*

The introduction of the National Health Insurance had already been mentioned in 1984, as one of the objectives to be achieved by 2000, in a report "A Comprehensive Plan of National Welfare System" issued by the Council for Economic Planning and Development of the Executive Yuan. With the support of senior cadres of the Kuomintang (KMT) government, the council invited three professors, Chiang Tung-liang (School of Public Health, National Taiwan University), Wu Kai-shiun (Department of Public Health, Fu Jen Catholic University), and Yang Chih-liang (School of Public Health, National Taiwan University), and established the National Health Insurance Planning Task Force (hereafter the CEPD Task Force) in 1988 (CEPD-NHIPTF 1990a) (see Figure 1). The task force compiled a report on the first phase planning (policy guidelines) in June 1990, and then entrusted the Department of Health of the Executive Yuan, which was in charge of the implementation of the NHI, with the second phase planning (implementation rules) (CEPD-NHIPTF 1990b).⁷

⁶ For more details, see the Civil Servants' Retirement Law (enacted in 1943).

⁷ There have been many well-researched papers in recent years on the introduction of Taiwan's NHI and the policymaking process behind the subsequent reforms. The most comprehensive ones are Lin Kuo-ming (1997) and Wong (2001). This paper owes much to the suggestions of these two studies.

Fig. 1. Planning and Administrative Organizations for Health Insurance



In the second phase of planning at the Department of Health, representatives of medical care organizations and of the Legislative Yuan participated as well. The number of advisors was increased to thirty-two in order to include a wider range of views. After more than two years of work, in December 1992, the Department of Health submitted both the "Important Points in Establishing a National Health Insurance Act (draft)" and the "Act for Establishing the Bureau of National Health Insurance" to the Executive Yuan. The draft of the NHI Act was subsequently presented to the Legislative Yuan for deliberation in October 1993.

The issue of health insurance reform began to attract attention as electoral politics emerged in Taiwan. In the supplementary election for the Legislative Yuan, held in 1986, campaign pledges to expand the range of health insurance and implement the NHI were adopted by forty candidates; they became the second most popular pledge.⁸ As soon as planning for the NHI began at the Council for Economic Planning and Development in 1988, legislative members with medical backgrounds, from both the ruling and opposition parties, formed policy promotion groups and made the NHI issue the central agenda for discussion in the Legislative Yuan (Lin Hui-fen 1993).

Experts in charge of initial policy planning could not ignore public opinions or the increasing activities of politicians. The interim report released by the CEPD Task Force in August 1988 stated that, "under the current social situation, there is a strong demand for the earlier implementation of NHI than originally scheduled. [The government] should reconsider the timing for the implementation" (Chiang 1991, p. 21). In January 1989, the CEPD Task Force proposed 1995 as the year to implement the NHI, in consideration of the conditions of administrative ability, public opinion, and the election cycle. In response, Executive Yuan Premier Yu Kuo-hwa announced on February 28, 1989 that the start of the NHI would be moved up to 1995.

This brief description shows that, while a sense of crisis toward maintaining political power prevailed in the KMT throughout the planning of the NHI, experts were involved in the planning process from the very beginning. However, the extent of their influence on the design of the insurance itself remains unclear. In the following section, I will analyze the political dynamics that influenced the NHI's design as policymaking moved from the CEPD to the Department of Health and the Legislative Yuan.

2. *Programmatic design*

As I discussed in Section II, while health insurance in Taiwan was provided by

⁸ The complete reelection of Legislative Yuan members was not held until 1992, on the grounds that Taiwan residents alone could not represent the whole of China. Instead, the number of Legislative Yuan members was increased to cope with the increase of Taiwan's population, and elections were only held to elect those who could represent residents of Taiwan.

occupationally-based insurance schemes, these schemes only covered half of the population before the NHI was introduced and most were in financial difficulties. In other words, the introduction of the universal health insurance was intended to address the dual purposes of expanding the health insurance system and containing soaring medical costs.⁹

(1) From “Grand Integration” to “Small Integration”

Experts on the CEPD Task Force were fully aware of the problems they would have to tackle. Initially, they made a proposal for a “grand integration” in order to eliminate the inefficiencies arising from the fact that various kinds of social insurance schemes were being managed by different government organizations. Grand integration meant that with the introduction of NHI, the government would establish a Ministry of Social Welfare and Health that would handle all social welfare-related policies, including health insurance, unemployment insurance, pension programs, and other social benefits. The integration of various schemes would also mitigate the limits on risk sharing resulting from the fragmented structure. The proposal was intended not only to promote integration in the area of health insurance but also reforms of the social security system in other areas. In the case of the NHI in particular, the Department of Health, the Ministry of Interior’s Department of Social Affairs, and the Council of Labor Affairs’ Bureau of Labor Insurance, which acted as insurers, would all be integrated into a National Social Insurance Bureau, which was to be set up within the Ministry of Social Welfare and Health. The task force expected that the integration, when realized, would reduce the administrative costs of the entire social welfare system, enhance equity, and improve the management of organizations related to the social security system. It was expected that if an integrated administrative organization could handle all schemes related to social insurance, it would eliminate the duplication of administrative tasks handled separately by different administrative organizations. For the health insurance, this meant the creation of a single-payer system, and thus the improvement of administrative efficiency concerning medical benefits. It was also expected that risk sharing among different classes, occupations, and generations would be improved by having everyone join a single insurance system (Lin Kuo-ming 1997, chap. 10).

However, this proposal for grand integration was dismissed during the second phase of planning, led by the Department of Health’s National Health Insurance Planning Task Force (hereafter the DOH Task Force). Instead, a plan for “small

⁹ Lin Kuo-ming (1997), who carried out the most comprehensive studies of medical care insurance in postwar Taiwan, analyzed five aspects of the NHI: administrative organization, coverage, finance, benefits, and payment system. This paper discusses administrative organization, finance, and premium adjustments, issues that were closely related to the aforementioned policy agenda and drew the greatest attention.

integration” was presented (see Figure 1). The small integration meant that a Bureau of National Health Insurance would be established under the jurisdiction of the Department of Health. This new bureau would take charge of the new NHI, while benefits other than medical ones (disability benefits, lump-sum allowances for old age, and allowances payable at death) within the various schemes (including Labor Insurance, Government Employees’ Insurance, and Farmers’ Health Insurance) would remain in the care of the Council of Labor Affairs, the Examination Yuan’s Ministry of Civil Service, and the Ministry of Interior, respectively. In other words, integration would be carried out for medical benefits, while fundamental reform of other social security programs would be postponed. The scale of restructuring of the bureaucratic organizations was reduced, along with the reforms of the social security system. This was a compromise to cope with the strong bureaucratic resistance.¹⁰ The Council of Labor Affairs of the Executive Yuan and the Ministry of Civil Service of the Examination Yuan, which had managed the occupationally-based insurances, opposed the grand integration because the establishment of the Ministry of Social Welfare and Health would mean a loss of power for them. In contrast, the Ministry of Interior of the Executive Yuan, with the expectation that a National Social Insurance Bureau could be added to its organization, and the Department of Health, which hoped that it might lead to its being promoted to ministerial status, were more receptive to the grand integration. Such conflicts of interests among bureaucratic organizations finally forced Hao Pei-tsun, the premier of the Executive Yuan, to make a decision in July 1992. Worried about the possible postponement of the plan resulting from further bureaucratic infighting, he accepted the proposal by the Department of Health and decided on the establishment of a Bureau of National Health Insurance under the Department of Health. In the end, the plan for “small integration” was adopted (Lin Kuo-ming 1997, chap. 10).

(2) Adjustment of Premiums

Another great difference between the draft presented to the Legislative Yuan by the DOH Task Force during the second phase of planning and the report of the CEPD Task Force concerned the premiums. One of the important purposes of the plan to reform the premium contributions was to alleviate the strain on insurance finance imposed by soaring medical costs. The most effective means to achieve this purpose was to raise the premium contribution of the insured and lower the government’s contribution. According to the initial plan drafted by the CEPD Task Force, the insured would contribute 50 per cent of the premium, regardless of the occupational category to which he/she belonged. This plan was rejected by the DOH Task Force, which decided instead that a 40 per cent contribution would be

¹⁰ For the attitudes of the various departments toward the grand integration, see the Department of Health (1990).

appropriate for government employees, teachers, wage earners, and farmers. The plan for a uniform 50 per cent contribution was originally intended to ensure institutional fairness and shift part of the fiscal burden to the insured. At first, the plan was welcomed by the Department of Health, but the contribution was lowered by the Guidance Commission¹¹ on the grounds that the intended raise would be too heavy for individuals who would also be paying for the extant Government Employees' Insurance, Labor Insurance, or Farmers' Health Insurance.

The next question regarded whether or not family dependents should be required to make contributions to the premium. At first, the CEPD and DOH Task Force agreed to exempt family dependents from contributions (CEPD-NHIPTF 1990b). However, intent on achieving fiscal soundness, the Guidance Commission of the DOH Task Force reversed this stance and decided that dependents should also have the obligation to make contributions (Lin Hui-fen 1993). This invited strong opposition from the Council of Labor Affairs, which fiercely criticized the Department of Health for advocating a measure that would disrupt the spirit of mutual assistance in society and cause discrimination within the labor market, as employers, who would also have to bear part of the dependents' contribution, would hesitate to employ workers with many dependents (*Zhongguo shibao*, May 23, 1993). After a debate between high officials of the Council of Labor Affairs and the Department of Health, which took place in the media, the Guidance Commission settled on a concession that required employers to pay for an average number of dependents per household, and the insured to pay premiums for the actual number of dependents.¹²

We can see from the above discussions that the programmatic design concerning details, such as adjusting premiums, was coordinated through debates among the ministries involved, with in some cases, the Guidance Commission or the Premier of the Executive Yuan directly making the final decisions. As a result, the original policy of integrating all programs and raising the premiums was only partially retained, and after the adjustment of premiums, the bill was presented to the Legislative Yuan for deliberation.

3. *Deliberations in the Legislative Yuan*

The deliberations of the NHI bill were among the issues that attracted the great-

¹¹ The Guidance Commission, which was composed of leading members of the task force, facilitated general planning, settled disagreements among members, and helped finalize decisions.

¹² Premiums are calculated by the following formula (Bureau of National Health Insurance 1998).

The insured: insured salary \times 4.25 per cent \times proportion of contribution \times (1 + number of dependents).

Employers: insured salary \times 4.25 per cent \times proportion of contribution \times (1 + 0.88).

Insured salaries: classified into twenty-eight brackets from NT\$15,840 to NT\$55,400 (as of July 1, 1998).

The regionally insured: uniform payment of NT\$604.

See Lin Kuo-ming (1997) for further details on the decision-making process for setting the insurance premiums.

est attention from the media at the time. Views were expressed not only by the KMT administration but also by the ruling party's "policy-active groups"¹³ as well as by opposition Legislative Yuan members. The debates intensified when the Executive Yuan presented the Department of Health's draft to the Legislative Yuan in late October 1993. The activities of the members of Legislative Yuan ranged from expressing views and interpellations at the Legislative Yuan to the preparation of legal drafts by some members. Indeed, in January 1993, ahead of the Executive Yuan's draft, the Health, Welfare, and Environment Council (a policy-active group of mostly KMT members) amassed signatures from twenty-three legislative members and submitted a first draft (the Health, Welfare, and Environment Council version), while Shen Fu-hsiung of the Democratic Progressive Party (DPP) submitted his version in March, with the signatures of seventy members. Subsequently, a total of five versions were formally presented to the Legislative Yuan, including those of Wu Dong-sheng, Lin Cheng-chieh, and Chen Che-nan (Chiang 1995; *Zhongyang ribao*, July 16, 1994).¹⁴ After negotiations between the ruling and opposition parties, the Executive Yuan version was presented to the general assembly for final reading (July 15, 1994). When the article-by-article voting began, the Legislative Yuan plunged into uncontrollable disorder, and in the midst of the clamor, the National Health Insurance Act was finally adopted at 1:00 A.M., July 19, 1994. In the process, protests regarding some specific issues led to cases of revolts among members of both camps. Indeed, the article for compulsory enrollment was rejected because some KMT representatives decided at the last minute to join the opposition DPP to oppose the article (Wu 1994).¹⁵

However, in contrast to the attention they gained, the deliberations in the Legislative Yuan failed to deal the DOH draft a critical blow. Even the rejected article for compulsory enrollment was reinstated, when it was added after the adoption of an amended bill on September 16. According to Lin Kuo-ming (1997), the author of the most comprehensive studies of Taiwan's postwar medical insurance, the deliberations in the Legislative Yuan centered on four points of contention: the content of benefits (whether the diagnosis of outpatients should be covered), administrative organization (whether it should be publicly or privately operated), the fiscal sys-

¹³ According to Wakabayashi (1992), the policy-active group (*wenzheng tuanti*) originated from groups formed by KMT representatives elected in the supplementary elections after the death of Chiang Ching-kuo in 1988. Its function was to strengthen their voice on Legislative Yuan management and cope with factional conflicts among the party's upper officials.

¹⁴ The NHI Act adopted by the Legislative Yuan does not differ much from the draft presented by the Executive Yuan. Consequently, the versions submitted by legislators are not detailed in this paper. For a comparison of these versions, see Chan (1995).

¹⁵ Article 12 (compulsory enrollment) was rejected 42 to 54 because of opposition by some KMT representatives, who were outraged by the bill because it did not legislate the "separation of dispensary (sales of drugs) from medical practice." The DPP insisted that the NHI should not be introduced unless improvements could be secured through revisions, and almost all DPP representatives voted against the article on compulsory enrollment.

tem, and the joint payment and referral system. But he also concludes that while these discussions in the Legislative Yuan attracted great attention from the public, they did not add any substantial modifications to the DOH draft.

B. *National Pension Program*

1. *Formation of policy issues and policy planning*

While universal health insurance has already been implemented, under the name of the NHI, the establishment of a comprehensive pension program has clearly been slower. Currently Taiwan has partial pension programs, in the form of old-age cash benefits provided by the aforementioned general insurances, such as the Labor Insurance and Government Employees' Insurance. But these are mostly lump-sum cash benefits. The amounts and payment durations of old-age benefits differ based on the insured period, the longest being fifty months offered by Labor Insurance.

The old-age pension was discussed within the KMT beginning in the 1970s, but its implementation failed because the ruling party was unable to resolve issues concerning financial and administrative resources (Fu 2000, p. 234). However, the discussion on introducing an old-age pension changed course after 1992. Rather than transforming parts of existing programs into pension schemes, the possibility of introducing a National Pension Program, as a universal basic pension scheme, began to take shape. This change of course was prompted by two factors. One was the fact that the DPP's inclusion of old-age allowances into its election promises had attracted public attention to income security for aged people. The other was the adoption by the KMT of the stance of dealing with income security for aged people by planning a more comprehensive "national pension" program, while branding the DPP's old-age allowance as a mere political show and a reckless waste of money (Chung 1995, p. 135).

The politicization of the issues concerning the NPP was triggered by the Legislative Yuan election of 1992. Well aware that many of the qualified voters were Taiwanese, old-aged, and farmers, Su Huahn-Dj, a DPP candidate from Tainan County, made the old-age allowance issue one of his major campaign issues (Lee 1996). The prevailing thinking at that time was based not so much on the idea of social security as on the rationale that Taiwanese farmers should also be entitled to the same old-age allowance (nearly NT\$5,000 a month) that was provided to the mainlander veterans.¹⁶ In the Legislative Yuan election, he scored a landslide victory, securing more than 100,000 votes, in sharp contrast to the mere 10,000 votes he had received in his unsuccessful campaign in the previous year's National Assembly election. Subsequently, the DPP secured another victory in the Penghu County

¹⁶ The author has confirmed this point with Su Huahn-Dj, who said that during the campaign, he put the following question to his audience, "Why aren't we given anything when a mainlander veteran can receive NT\$5,000 a month?"

magistrate special election held in February 1993, by adopting the old-age allowance issue as the campaign issue.

Upon assuming his position as a Legislative Yuan member, Su presented the “draft of a National Pension Program Act” in April 1993, together with other DPP legislative members. Subsequently, Shen Fu-hsiung, also a legislator of the DPP, with the signatures of thirty-five legislative members, presented his own version of the draft National Pension Program Act. In September of that year, some DPP legislative members, party officials, and staff members formed a “Respect-for-the-Elderly Pension Action Coalition,” which promoted an old-age pension in tie-up with the “Coalition to Promote Elders’ Welfare” formed by scholars and activists engaged in social welfare. These organizations held a series of open debates and demonstration marches in October, drawing public attention to the issue. As a result of this social mobilization led by DPP forces, all of the DPP candidates for the local magistrate elections scheduled for December adopted the campaign promise of old-age allowances in amounts ranging from NT\$3,000 to NT\$10,000 (*Zhongyang ribao*, January 5, 1994; *Zhongguo shibao*, December 28, 1993).¹⁷ As the original advocate of a welfare state with an old-age allowance as the core of public policies, the DPP successfully raised its popularity, gaining 41 per cent of the votes. This represented a 10 per cent increase compared to the 31 per cent it had won in the Legislative Yuan election of 1992. This created the impression that the strategic adoption of social security system reform as a campaign slogan was effective.¹⁸

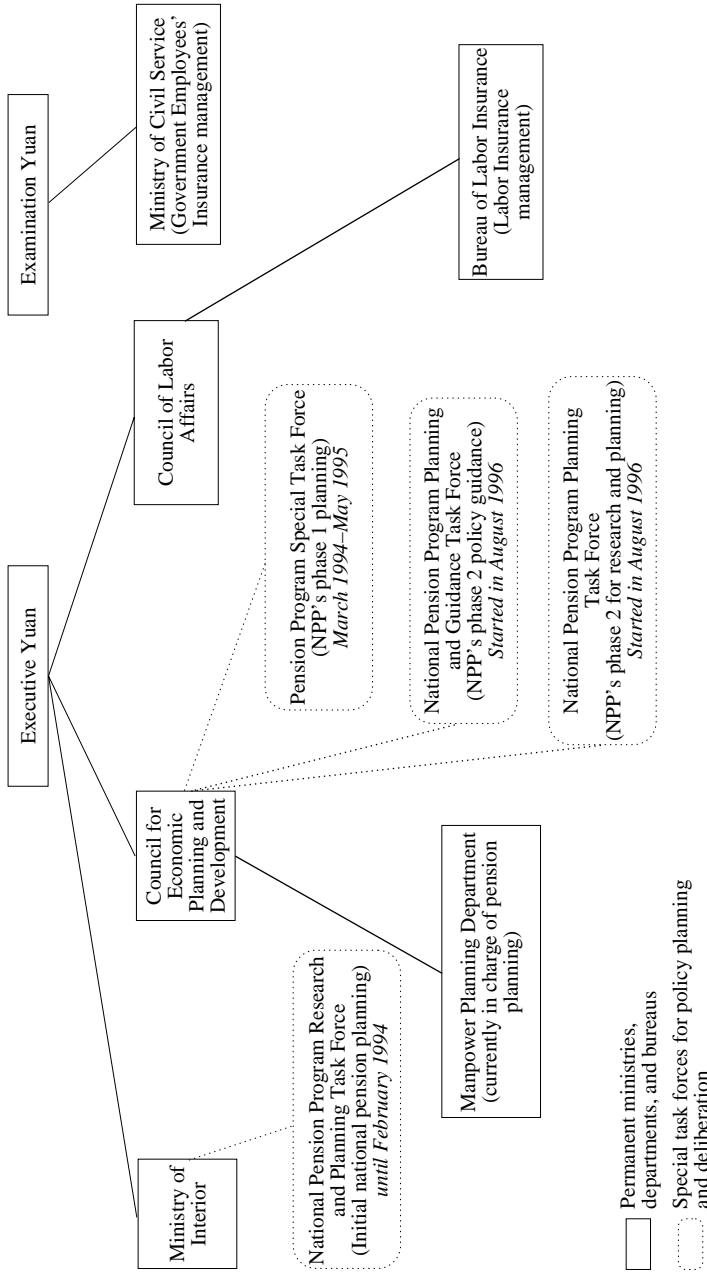
In response to public opinion and social trends, the KMT government hastened preparations for the introduction of the NPP. First, the Ministry of Interior launched the National Pension Program Research and Planning Task Force (hereafter the MOI Pension Task Force) in May 1993, announced a preliminary plan in November that year, and presented its report and the gist of the NPP plan to the Executive Yuan in February 1994 (see Figure 2).¹⁹ In July 1993, the government also amended the current scheme of “allowance for the middle and low-income elderly” and implemented a new scheme in October. With these measures, it strove to present the impression that it had been making efforts on old-age income security issues even before DPP’s call for reform. Then, in March 1994, the Council for Economic Planning and Development, which had been entrusted with planning the pension pro-

¹⁷ As the implementation of the pension program was to be realized much later, it was felt necessary to promise, for the time being, the payment of old-age allowance.

¹⁸ In the 1993 local magistrate elections, the DPP was triumphant in only six local self-governing bodies, the same number as in 1989. Fu’s (2000) regression analysis of election behavior shows no proof that the difference in pension policies between different camps directly affected voting behavior, because many voters were not aware of this difference. However, it should be emphasized that competition over campaign promises was one of the factors leading to the eventual attempt to introduce a comprehensive pension system.

¹⁹ Planning and research on the NPP were also carried out by the ministries and agencies concerned, including the Ministry of Interior, Council of Agriculture, and Ministry of Civil Service. This paper touches only on the Ministry of Interior, which has the greatest influence on this matter.

Fig. 2. Planning and Administrative Organizations for Pension System



gram, established the Pension Program Special Task Force (hereafter the CEPD Pension Task Force). Based on the report of the Ministry of Interior, the CEPD Pension Task Force began to work on the specific programmatic design.

The initial campaign promise battle over the issuance of old-age allowance developed into debates and concrete plans for the introduction of the NPP. Without any clear idea of the difference between the old-age allowance and pension programs, heated discussions on the introduction of the NPP ensued. This confusion hampered the formation of a national consensus and resulted in a delay in the introduction of the NPP, as will be discussed later. Nevertheless, it is possible to assume, as indicated in the following section, that the KMT's sense of crisis of its ability to retain power contributed to the formation of the NPP policy issue.

2. *Programmatic design*

In April 1995, the CEPD completed the phase 1 planning, and presented to the Executive Yuan a report on the "Coordination of the National Pension Program" (CEPD 1995). The draft prepared by the CEPD differed from the earlier version of the Ministry of Interior mainly in the formula used for benefits calculation, the availability of government contributions, and the feasibility of integrating the existing occupationally-based social insurance system. In contrast to the MOI's proposal of monthly benefits equivalent to 60–80 per cent of the previous year's average monthly household expenditure per person, the CEPD formula was 50–70 per cent of the previous two years' monthly consumption per person. This would result in a decrease in the amount of benefits to be received by enrollees from NT\$6,600–8,800 to NT\$4,520–6,400. The CEPD also declared that, in order to lighten its financial burden, the government would pay no portion of the premiums. The MOI retained the option of integrating the existing occupationally-based social insurances, whereas the council was lukewarm toward integration, for fear of heavy administrative costs (CEPD 1995, pp. 74–97). In spite of this difference, the plan proposed in the CEPD report followed the general guideline envisaged by the MOI draft. The most important feature of the new NPP, to be introduced in the near future, would be to act as a universal pension program of the social insurance type. The new national pension program would be implemented even while the existing occupationally-based social insurance would remain active. In other words, the plan was to establish a two-tier system under which the new NPP would be a basic pension program, while the existing occupationally-based insurance systems would be retained as additional pensions.

After the second phase of planning in 1998, the programmatic design became clearer.²⁰ The CEPD's motto of "separating the administration, unifying the con-

²⁰ For the second phase of planning, the National Pension Program Planning and Guidance Task Force (for policy deliberation) and the National Pension Program Planning Task Force (for policy study) were set up within the Council for Economic Planning and Development (see Figure 2).

tents” showed clearly that the reform would be pursued by maintaining the existing occupationally-based schemes and their administrative structures while ensuring the consistency of the contents of benefits. The reform was intended first to complete the process of transforming the old-age benefits of existing occupationally-based insurances into a pension program. The second objective of the reform was to launch a new NPP to cover the 4.79 million people (including 0.57 million aged sixty-five or over), who were not covered by the occupationally-based insurances (CEPD-NPPPTF 1998, p. 12). Under this measure, those who were already beneficiaries of some form of public insurance with old-age benefits would be given the choice of staying within the present insurance or switching to the new NPP. Those who had not joined any public insurance would be given a grace period of three years, after which those over the age of twenty-five would be forced to join the new NPP. The premium was set at 10 per cent of the insured salary, and the contribution shares at 20 per cent by the government (40 per cent for farmers and low-income earners), 60 per cent by employers, and 20 per cent by the insured. The benefits would be determined through this defined-benefit system and adjusted with price indexation or to the wage growth rate. The government planned to secure the necessary financial resources by raising the consumption tax from 5 per cent to 6 per cent (CEPD-NPPPTF 1998, pp. 26–27, 47). However, the plan was postponed when a powerful 7.6 magnitude earthquake struck the island in September 1999.

In May 2000, a DPP government took power, and the CEPD presented a new report in August. In addition to NPP Plan A (the former social insurance scheme), the report added a new Plan B (a defined-benefit scheme funded by general tax revenues), where no contribution would be required from the insured.²¹ The financial sources for a basic national pension, according to Plan B, would be secured from the government’s general budget and by a hike in the consumption tax. It would include benefits for the elderly, disabled, and orphans. The amount of old-age benefits, obviously the most important portion, was set at 20–25 per cent of the average monthly spending per person for two preceding years and no lower than NT\$3,000. Within the CEPD report, Plan B was envisioned as the basic pension program, with the old-age benefits provided by other insurances to be reformed

²¹ Actually, Plan A also differed from the social insurance type of pension proposed in 1998 as it included elements of both social insurance and of a personal defined contribution pension. Specifically, although the government, employers, and insurants were all to contribute to the premium, 80 per cent of the contributed premium was to be paid into a personal account, which would become a post-retirement pension. The remaining 20 per cent would be pooled in the annuity insurance fund. A person’s premium was set at 10 per cent of the full pension (50 per cent of monthly expenditure per person). These factors added the nature of personal savings to Plan A, but proponents argued that it did retain, to a degree, the feature of a social insurance system for three reasons. First, it would continue to rely on the government’s contribution. Second, part of the premium would be paid into the insurance fund. This would allow for some degree of income transfer. And finally, a minimum amount of benefits (50 per cent of monthly expenditure per person) would be guaranteed. For more details, see the CEPD report (CEPD 2000).

into additional pensions. This plan was intended to lighten the insurers' burden by implementing a basic pension relying on tax revenues, and at the same time to reduce the existing premiums of Military, Government Employees', and Labor Insurances (CEPD 2000, pp. 15–19). While Plan B differed from Plan A in how the proposed basic pension would affect the existing occupationally-based insurances, the most crucial difference lay in the fact that it was completely general tax revenue-funded, an idea which did not exist even at the final stage of policy planning by the KMT administration. In other words, the general tax revenue-funded scheme only appeared after the DPP came to power. In the following section, we will discuss the background for the DPP government's preparation of Plan B, and the failed attempt to pass the NPP bill in September 2000.

3. *Unsuccessful introduction*

After extensive study and planning beginning in 1993, the KMT government declared that the NPP would be introduced in 2000. However, the greatest concern regarded the financial resources. Taiwan's continuous fiscal deficits since the latter half of the 1980s had resulted in an accumulation of government debts, reaching 13 per cent of GNP in 1994. The government, in the face of these financial constraints, proposed to raise the consumption tax from 5 per cent to 6 per cent in order to secure the necessary financial sources to launch the NPP. This proposal stirred up rigorous opposition from the business community. However, before the controversy was settled, the severe earthquake struck the island. In order to secure financial resources for rehabilitation from the quake, the government decided to shelve the plan to introduce the NPP plan in 2000. Thus, postponement seemed inevitable.

However, the pension issue drew renewed attention when the DPP took power in May 2000. In September, the Executive Yuan presented its report, including Plans A and B, to the Legislative Yuan. The DPP government intended to implement the NPP by the end of 2000. The reemergence of the NPP originated from the presidential election of 2000. During the campaign, Chen Shui-bian's camp had announced the "3-3-3 policy," which constituted his main policy for social welfare reform. He promised to provide a monthly allowance of NT\$3,000 to those over the age of sixty-five, free medical treatment for children under three, and housing loans at an interest rate of 3 per cent for first-time house purchasers.²² When Chen Shui-bian won and became president in May 2000, he needed to fulfill his campaign promise, and presented bills embracing elements of his "3-3-3 policy" to the Legislative Yuan. However, during the deliberations, these bills were criticized regarding their actual necessity and social fairness. Even within the ruling DPP, many were critical of Chen's "3-3-3 policy" package. Some cabinet members, whom Chen had ap-

²² During his term as Taipei mayor, Chen Shui-bian provided old-age allowances for seven months, but discontinued the practice for budgetary reasons (*Zhongguo shibao*, September 20, 1998).

pointed himself, expressed caution publicly on pursuing these social policies (*Ziyou ribao*, May 25, 2000; *Zhongguo shibao*, May 12, 2000). On top of the internal disagreement, the DPP was a minority ruling party in the Legislative Yuan. The two largest opposition parties, the KMT and the People First Party (PFP), voiced strong resistance to the old-age allowance on the grounds that discussions concerning financial sources, amounts of benefits, institutional equity, and its relationship with the to-be-implemented NPP had been less than satisfactory.

On the issue of financial sources, the argument focused on whether it would be legal and appropriate to use the second reserve fund²³ in implementing such a “semi-permanent” policy as the old-age allowance. The monthly allowance of NT\$3,000 was also criticized as being insignificant as it amounted to only one-fifth of average per capita monthly spending. It was also pointed out that to provide allowances to individuals over the age of sixty-five who were earning high income would be counter to social equity. Further, the DPP government had failed to demonstrate how it would coordinate and secure consistency between the to-be-implemented NPP and the old-age allowance program. Members of the opposition parties in the Legislative Yuan opted for a strategy of increasing the allowance from NT\$3,000 to NT\$7,000, insisting that the new amount would make the allowance meaningful for the recipients. However, the DPP, the original advocator of the plan, had to oppose this measure on the grounds that it would sharply expand the initial budget of the program. These discussions in the Legislative Yuan eventually delayed the start of the plan for old-age allowance, which had been scheduled for July.

In an attempt to break the legislative deadlock, the government indicated that it was willing to shelve the old-age allowance plan if the opposition parties would agree to cooperate to work toward implementing the NPP in January 2001. Following negotiations between the ruling party and opposition forces, the DPP withdrew the old-age allowance bill in exchange for an agreement by the opposition parties to deliberate on the NPP bill, which would be presented shortly (*Zhongguo shibao*, August 2 and August 3, 2000). The NPP’s sudden reemergence was due to a calculation by the DPP that it would be difficult for the opposition forces to refuse or block deliberations on it, since it had been discussed for so many years. The government also felt that if it were able to introduce the NPP, obviously a more comprehensive program than the old-age allowance, it could fulfill its campaign promise and at the same time create new possibilities for improving its minority situation in the Legislative Yuan.

However, as mentioned earlier, the draft prepared by the new government included Plan B for the first time. Two factors had contributed to its formulation. First, after the DPP drew attention to the need to improve old-age income security in its electoral campaigns, it advocated in its policy white paper a two-tier pension

²³ This is a special reserve for emergencies such as natural disasters.

program, consisting of a basic pension relying on the sales of public enterprises as financial sources (first tier), and an additional pension to be secured by reforming the existing occupationally-based insurance (second tier) (DPP-PRCC 1995, pp. 57–64). Plan B's programmatic design was along the lines of the basic pension which the DPP had advocated during its days in the opposition. However, in the policy white paper the benefit was set at 50 per cent of average monthly spending per person, whereas in Plan B, which was proposed by the CEPD under the DPP government, the amount was set at 20 to 25 per cent of average monthly spending per person and the minimum amount at NT\$3,000. The fact that the minimum amount was the same as Chen Shui-bian's campaign pledge for old-age allowance was not coincidental. It reflected the administration's strong pressure to demonstrate that it was committed to realizing its old-age allowance program.²⁴ In other words, the second reason for the emergence of Plan B was this intention.

Obviously, the opposition parties did not find the inclusion of Plan B persuasive, as it seemed so similar to the old-age allowance. They launched harsh criticism of the draft through the media even before it was presented to the Legislative Yuan on September 15. Yu-Lan Liu, chief officer of the CEPD's Manpower Planning Department, who had been in charge of NPP planning even during the KMT administration, announced that she would resign in protest against the new administration's policy to promote Plan B. Although Liu was later dissuaded by the CEPD chairman and withdrew her resignation, this incident made the opposition parties in the Legislative Yuan more critical of the deliberations on a choice of Plan A or Plan B (*Zhongguo shibao*, August 31, September 1, and September 7, 2000).

The confrontation over the NPP between the ruling and opposition parties intensified even before deliberations began in the Legislative Yuan, forcing the DPP into a predicament. In the meantime, signs of a full-scale recession began to loom over the Taiwanese economy due to multiple factors such as the U.S. economic slowdown and the increasing shift of Taiwan's labor-intensive industries to mainland China. The unemployment rate had been on a continuous rise since Chen Shui-bian had assumed the presidency, and Taiwanese were eager to see some specific policy package to boost the economy. In his comments made in response to these demands, Chen announced on September 16 his policy of "giving priority to economic development and shelving social welfare for some time." On the following day, Chang Chung-hsiung, vice-premier of the Executive Yuan, officially acknowledged that the NPP, which had originally been scheduled to start in January 2001, would be postponed (*Zhongguo shibao*, September 17 and September 18, 2000). Premier Tang Fei also commented that the timing for the introduction of NPP and the contents itself would have to be reconsidered as a tax increase seemed unrealis-

²⁴ Interview on November 7, 2000, with Huang Mei-ling, member of the Policy Research and Coordinating Committee of the DPP.

tic in light of the predicted fiscal burden of structural adjustments in agriculture and industries as a result of Taiwan's admission to the WTO in 2001. Further, since Legislative Yuan and local magistrate elections were scheduled in December 2001, unpopular tax hikes were simply out of the questions (*Zhongguo shibao*, September 23, 2000).

The DPP thus abandoned the plan to introduce the NPP in 2001 and instead altered its position to realizing it during Chen's term of office. The Council of Labor Affairs made renewed efforts to implement the Retirement Pension Scheme for workers in accordance with the amended Labor Standard Law of 1985, and revived the plan to improve the old-age allowance of Labor Insurance, which had been shelved since planning on the NPP was started in 1994. Labor Insurance already had 7 million beneficiaries and NT\$400 billion of reserve, and the plan to introduce a pension benefit under it drew attention as a means to relieve the problem of the introduction of the NPP (*Zhongguo shibao*, September 25, September 28, and September 29, 2000). The concrete contents of the Labor Insurance's pension benefits have yet to be finalized.

We have so far discussed the formation of policies concerning the NPP as well as its unsuccessful introduction. Although partly due to contingency factors such as an earthquake and the global recession, the programmatic design was affected by the framework of the existing occupationally-based insurance, while the general tax revenue-financing method emerged with the change of government, and the failure to introduce the old-age allowance and NPP largely reflected the DPP's minority position in the Legislative Yuan. Based on this observation, the following section will present a framework for conceptualizing the policymaking process for both the NHI and NPP.

IV. POLICY LEGACIES, POLITICAL ACTORS, AND POLICY PHASES: THE POLICYMAKING PROCESS IN TAIWAN

To begin with, we will clarify certain issues involved in policymaking.²⁵ Policy-making has two aspects: one concerns the policy process of a specific policy, and the other deals with the power process of specific actors. The policy process focuses on the concrete development process of "policy plans," whereas the power process shows the course through which actors maintain and expand their powers and influences using various issues and policies (Ōtake 1990, pp. 204–5).²⁶ The

²⁵ In this section and the Conclusion, the author owes much to the comments of Yukihiro Satō.

²⁶ Ōtake's original text uses "political process" instead of policymaking, but the author feels that both are of similar meaning in this context. According to Ōtake, the policy process aims to model the occurrence of an idea or the process of its transmission, and as a result, can lead to a functional analysis of the policymaking system. This paper does not take the position of a strict functional

framework presented in this paper reflects a summary of the viewpoints of prior studies on social security policies, and aims to cover both the policy processes (horizontal axis) and power processes (vertical line) of policymaking (Table III).

The vertical axis consists of political actors and policy legacies. These are factors that affect policies. There are abundant studies that regard individuals or groups as actors who exercise, maintain, and affect policymaking in order to pursue their preferences. In the area of social security policy in particular, these actors' behaviors and mutual interactions can be grasped in terms of class coalitions, policy coalitions, cross-class coalitions, and interest group politics.²⁷ Meanwhile, Pierson (1994) maintains that the existing policy (policy legacy) itself constrains actors' behavior in the phase of welfare retrenchment, and also stipulates policy options for reform. It is in essence an independent variable, in which policy itself can bring about policy. In short, actors and existing policies are both independent variables that affect policymaking. Hence, most studies adopt a multi-viewpoint stance, using a variety of variables that include "actors" and "policies" or "institutions." Actors are those who participate in policymaking on the basis of power derived from state or social structures (e.g., bureaucrats, union representatives, and industrial organization representatives), or created by certain policies (specific interest groups). Institutions refer to the policy legacies. However, in the abstraction of facts, these approaches share a commonality in that they are all attempts to understand "what factors (policy, institutions, or actor's preferences) determine the contents of a policy." The vertical axis of Table III is an attempt to integrate the variables identified in prior studies in order to understand how policy contents are formed.

Another aspect that composes policymaking is, as pointed out by Ōtake, the development process of policy itself. The horizontal axis shows four phases of this process. The phases are obviously for conceptual convenience, and are divided according to the "arenas" (public opinion and society at large, the ministries in charge of policy, the legislature, and their mixture) in which the policies are discussed, planned, or decided. The reason for using the concept of arena is that policy contents vary when different actors participate under different contexts, and that different rules are required under different contexts.²⁸ The fourth stage is arranged to conceptualize how problems (which can eventually become policy issues) arise after policies are implemented, and what roles each actor should play. Of course,

analysis, but the author believes that the formation of a policy issue is similar to the occurrence of an idea concerning policy, and that the division of the policymaking process into stages helps gain the affinity with phase analysis demanded by the functional viewpoint. An apt example of empirical analysis centering on function is March and Olsen (1989).

²⁷ These arguments are made respectively by Esping-Andersen (1990), Anderson (1993), Wong (2001), and Pierson (1994).

²⁸ Some examples are Campbell (1992) and Campbell and Ikegami (1998). Immergut (1992) also uses the concept of arena, where the veto point granted under the constitutional system is emphasized.

TABLE III
DYNAMICS OF THE POLICYMAKING PROCESS OF SOCIAL SECURITY SYSTEM IN TAIWAN

		Policy Development and Policy Phases				
		Stage 1 (Formation of Policy Issues)	Stage 2 (Policy Planning)	Stage 3 (Deliberations)	Stage 4 (Policy Implementation and Identifying Problems)	
Factors for Forming Policy Contents	Policy Legacies (formation of policy issues; constraints on policy options) Medical Insurance (elimination of deficits; expansion of social insurance) Pension (expansion of the program to all social strata; unifying benefits)	Experts and Bureaucrats	Recognition of policy issues and response	Control of the planning process by utilizing one's own expertise and recruiting experts	Agreement of opinions leads to legitimacy, but concessions are required for specific issues	Expressing the need to introduce new measures to pacify unsatisfied groups; discontinuing some measures
		M: Improvement of financial difficulties through integration	M: Integration of fragmented insurance system and measures for financial improvement	M: Coordination of premium rates	M: Discontinuing the referral system; introducing the Global Budget Control System	
		P: Maintaining the existing administrative system while attempting reform to improve financial conditions	P: Maintaining existing systems while carrying out reform for consistency in benefits; drafts may be modified by changes of government	P: Unable to control the amount of benefits; bureaucrats sometimes protest by resigning	P: Developing pension schemes for the Labor Insurance and Retirement payments without waiting for the introduction of NPP	
		Politicians	Drawing voters' attention to the issues	Politicians may attend committees but most have limited influence for lack of professional expertise	Securing support of public opinion by drawing attention to specific issues; representing specific interest groups	Demanding reforms of the present system based on society's discontent
		M: Representing single issues or special interests	M: By presenting their own drafts, they check the administrative sector and draw the attention of society	M: Reducing the premium contribution share	M: Discontinuing the referral system; prevention of privatization	
		P: Identifying disparities among societal groups; the remedy is programmatic expansion	P: Same as above. Resolving disparities by cooperating with societal groups	P: Increasing the amount of benefits	P: (Undecided: some demand the implementation of pension schemes in Labor Insurance and Retirement payment)	
	Societal Groups	Participation in movements led by politicians	Members of societal groups attend committees or serve as advisors at times, but their influence is limited	Lobbying members of Legislative Yuan through cooperation among organizations	Calling social interest to policy issues	
	M: Active roles after implementation	M: Little influence	M: Reduction of premium contribution; prevention of privatization	M: Prevention of reforms such as increased burden		
	P: Politicization of issues and pursuit of interests through social movements	P: Little influence	P: Input in programmatic design	P: (Undecided: continued demand for early implementation of the pension program)		

Source: Compiled by the author.

Note: M stands for Medical Insurance and P stands for Pension.

this development process itself is cyclical, and the problem formed at the fourth stage eventually becomes a policy issue and emerges as a full-fledged policy after going through a similar development process.

The attempt here is to construct a framework to explain the policymaking process of Taiwan's social security by integrating various approaches. Next, we shall apply the "facts" discussed in Section III to this framework.

A. *Impacts and Limitations of Policy Legacies*

Up until the 1990s, Taiwan's social security system produced a disparity between insurants and non-insurants as generous medical care benefits were gradually expanded. On the other hand, we can see from the discussion in Section III that these disparities were partially eliminated by the introduction of the NHI, which, in turn, was greatly affected by policy legacies in aspects such as the administrative organization and premium contribution structure. For instance, both the NHI and NPP (now under deliberation) have adopted (or, are expected to adopt) a social insurance method based on an occupationally-based system. Another result is that the government failed to implement comprehensive reforms such as a full-scale integration of the existing systems, or raising the premium to ease financial difficulties. It appears most likely that the administrative organizations and funds for the occupationally-based insurance systems, such as Labor Insurance, will remain as they are, with some improvement in the consistency of benefits, even if the NPP is introduced. Policy legacies can thus be said to have the effect of determining the course of reform (as shown in Table III).

However, it should be noted that the reforms also brought about results that were evidently not related to policy legacies. For instance, the medical insurance schemes of the occupationally-based insurance systems were dissolved as all the health insurances were unified into a single-payer system. Also, introducing measures such as the global budget control system enabled the containment of rising medical costs (we cannot discuss this issue in this paper due to the space limitations). Furthermore, compared with medical insurance, where benefits and coverage continued to expand after the 1970s, pension benefits, which had received little attention under Taiwan's occupationally-based general insurance, did not begin to attract attention until as late as 1992. This has stimulated further discussions into the introduction of the NPP under a new concept. The fact that the introduction of the NPP came close to success may be proof that, rather than examining the influences exerted by policy legacies, examining the participation of political actors in policy development and their interactions during each policy phase can lead to a more fruitful analysis of policymaking, at least in the case of the NPP.

B. *Political Actors and the Policymaking Stage*

The sense of crisis within the KMT, along with the necessity of reforming the

existing system, directed the policy guideline for reforms toward the integration of medical insurance and the implementation of the NHI. As a result, in the first phase of policy issue formation, the political elites led the way in coping with policy legacies. Meanwhile, the NPP represented an issue (old-age allowance) which had been proposed by the opposition through social campaigns, but the KMT government was quick to absorb it and to make it into an agenda of its own social security policy. Together, the experiences of both the NHI and NPP suggest that different actors can play the role of promoting the formation of policy issues, depending on their strategy and purpose.²⁹

However, since the social security system itself required a vast and complicated volume of professional knowledge, its policy planning (second phase) was often led by bureaucrats and experts (Lin Kuo-ming 2000). Indeed, the planning of the medical insurance and pension program was led by the relevant ministries of the Executive Yuan (the Council for Economic Planning and Development, Department of Health, and Ministry of Interior) as well as by experts recruited by these bureaucratic organizations. As electoral competition intensified in line with democratization, politicians (parliamentarians) began to take up social security policy as one of their campaign topics. However, their direct involvement in policy planning was limited, and so were the resources (professionals and research outcomes) available for planning. Consequently, although it was able to exert a strong influence on the formation of policy issue at the first stage, the Legislative Yuan's role during the second stage was limited to modifying specific aspects of the entire program, such as premium contribution shares, by presenting its own draft to the Legislative Yuan and drawing the attention of the public. In the end, however, their efforts did not result in the passage of the bills submitted by the legislative members. Representatives of interest groups were present at the NHI Task Force, which played an important role in the NHI planning process, but their roles were limited to providing expertise, and they could not create policy guidelines to reflect the preferences of the interest groups they represented.³⁰ After the change of government, labor groups and organizations representing the elderly, which had maintained close relations with the DPP while it was in opposition, gained greater access to the government. It appeared that with the emergence of Plan B, their demand for the introduction of a certain type of old-age income security scheme was better reflected in the policy alternatives. However, since the plan was harshly criticized and the introduction of the NPP eventually failed, the influence of these interest groups should not be over-

²⁹ In an interview held on November 3, 2000, Liu Chin-ying, formerly a DPP legislative member and currently an advisor to the Council of Labor Affairs, said that the NHI represented a top-down reform, whereas NPP was the result of bottom-up reform.

³⁰ This point should be clarified in future studies, but in the author's own preliminary interviews (with labor groups and physicians) and Lin Kuo-ming's survey (1997) as well, the interviewees were unanimous in emphasizing their powerlessness against the government.

estimated. Nevertheless, this development suggests that societal groups, which once asserted little influence in Taiwan, can now make their preferences better reflected in policy planning because of their experiences in collaborating with the opposition, which took over power through elections.

When deliberations begin in the Legislative Yuan (third stage), the legislators' influence obviously becomes stronger. However, the intricacy of the social security system makes it difficult for legislators to present a comprehensive policy vision because of the difficulty in securing even their colleagues' support, let alone to win the understanding of the voters to whom they would particularly like to appeal. As a result, they are forced to choose a single issue upon which it is easy to win voters' understanding (such as the contribution shares of health insurance premiums and the amounts of pension benefits). Interest groups can lobby for specific issues, but they have yet to become powerful enough to exert any decisive influence. In order to more effectively influence public opinion, the issues are adjusted and simplified, but in actual deliberations, the intricacy of social security policy makes it difficult to reach a consensus even among politicians of the same political parties.³¹ Hence, the legitimacy of policies requires that a consensus be formed between bureaucrats and professionals. If confrontation over core issues (such as national identity or the building of the fourth nuclear power plant) prevails and spills over to social welfare policy, it becomes difficult to gain the cooperation of opposition parties. For example, the failure of the NPP originated from a lack of agreement among bureaucrats and professionals and from the fact that the majority of opposition groups were keen on hampering the efforts of the new administration.

The following account is specific to the NHI, but in implementing policies (fourth phase) the administrative sector operates under the pressure to implement and maintain the system, while legislative members continue to take up individual issues upon which societal groups are dissatisfied. At this stage, even though they are unable to make comprehensive proposals, legislative members, who have gained added influence due to democratization, try to interfere with noticeable frequency. In some cases, the emergence of social forces and interest groups is not insignificant. Despite the financial difficulties, the KMT government found itself forced to agree, at the last stage, to bear a 10 per cent premium contribution for a certain segment of workers. After the implementation of the system, the unpopular referral system and the questionable treatment of the average number of dependents were corrected. Moreover, the attempts to privatize health insurance in 1997 and 1998 were blocked, although this is an issue that goes beyond the scope of this paper.

³¹ Issues for health insurance include the share of premium contribution, the range of benefits, restraints on medical expenditures, and the separation of dispensary from medical practice. Issues for pension include the amount of benefits, qualification for enrollment, share of premium contribution, administrative organization, fund investment organization, and integration with existing insurance systems.

These cases also point to a noticeable increase in feedback from interest groups.³² Consequently, in policy implementation and problem identification (fourth stage), cooperation between politicians and interest groups has taken on added importance. This paper has attempted to capture the dynamics of policymaking on the social security system, by dividing the introduction and implementation of social security policies into different phases.

TENTATIVE CONCLUSION

The experience of Taiwan in the 1990s presents a model case of a society where procedural democracy has gradually taken shape. Starting with complete re-election of the Legislative Yuan and the National Assembly, the island went through the experience of the constitutional amendment, the direct elections of special municipality mayors, direct election of the president, the “streamlining” of the provincial government, and finally the KMT’s stepping down as a result of the presidential election in 2000. As procedural democracy became entrenched, however, new problems emerged. The deepening of democracy has brought about heated electoral politics. This has led to an increase in pork barrel politics, particularly after the election of the National Assembly in 1991 (Chu 1992). The weakened control over society by the state is not simply a result of society’s growing ability to scrutinize state authority. It also derives from the fragmentation of state actors. This division began to surface when “policy-active groups” appeared within the KMT in the late 1980s, and was exacerbated by Lee Teng-hui’s alliance with the local factions in his power struggle against KMT hard-liners. Consequently, party control within the KMT deteriorated to a degree that would have been unimaginable in the days of authoritarianism (Satō 2000). In contrast, the influences of individual politicians were strengthened by electoral politics and the intensified intra-KMT conflicts. In present-day Taiwan, complicated social interests tend to surface not through political parties, but rather haphazardly, through personal networks or political bases of individual politicians or local factions. In terms of social security policies, politicians who can exert their clout in elections are becoming more influential while policymakers (bureaucrats and experts), who retain the upper hand in the realms of the asymmetry of information and organizational consistency, still retain strong influence. Conflicts among bureaucratic organizations surface more often than they did under the authoritarian system, but this does not imply a decline in their influence over policies. As we have seen from the discussions of health insurance policy and pension policy in this paper, the policy preferences of experts and bureaucrats in

³² Due to space limitations, this paper could not analyze how the Department of Health attempted in vain to promote the privatization of health insurance in 1997 and 1998. However, this instance illustrates the significance of cooperative relationships among societal groups and politicians. For details, see Wong (2001).

certain policy areas are often strongly reflected in the actual policies, because of the scarcity of accumulated expertise in society.

Lastly, we will briefly touch on the characteristics of the bureaucrats and experts who play such an important role in Taiwan's policymaking process. The role of experts is first to determine grand policy guidelines and then to coordinate programmatic designs in detail with the bureaucrats in charge. With their expertise and information, they are pivotal in creating the legitimacy of reform policies as well as promoting the general policy guidelines of integrating health insurance systems and ensuring programmatic financial stability. However, they face certain limitation, as shown in our discussion of the policymaking process from planning to implementation. This became most obvious when the CEPD Task Force's idea of grand integration, to which it attached great importance at the outset, was altered when the policy planning was transferred to the Department of Health.

It is therefore reasonable to assume that the major forces that direct the course of reform are the bureaucrats who endeavor to maintain and expand their organizational power. Taiwan's bureaucratic machinery is characterized by the fact that: (1) it has no established "*amakudari*" ("parachuting" of former officials with influence to private sector posts) system; and (2) many high-ranking bureaucrats are political appointees. According to Cho (1998, p. 113), the institutionalization of the practice of *amakudari* requires a coincidence between the interests of the private and public sectors. The fact that *amakudari* has not been established may suggest a gap of interests between the public and private sectors in Taiwan. The fact that many of the members of Taiwan's business community advocate the introduction of medical savings accounts (MSA) and are opposed to the NPP, in contrast to the bureaucrats who seem to proceed in the opposite direction, may infer the existence of such an interest gap.

Another feature worthy of attention is the power to appoint high-ranking officials, which allows the winner of the presidential election to have a decisive impact on high-ranking bureaucrats. The sudden emergence of Plan B in the NPP is not irrelevant to this feature. Political appointments also make it possible to place scholars into the upper echelons of the bureaucratic organizations, and in actuality, many experts participating in various task forces have been appointed to posts such as bureau chiefs or cabinet members. It is necessary to identify the impact this "revolving door" between academy and bureaucracy can have on the process of policymaking. An analysis including this viewpoint, if refined further, should be able to lead us to more meaningful analyses of the reforms of the social security system.

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