A SUSTAINABLE POPULATION FOR A DYNAMIC SINGAPORE

POPULATION WHITE PAPER

JANUARY 2013

EXECUTIVE SUMMARY

BACKGROUND

Our citizen population reached a turning point in 2012, as our first cohort of Baby Boomers turned 65. Singapore will experience an unprecedented age shift between now and 2030. Over 900,000 Baby Boomers, more than a quarter of the current citizen population, will enter their silver years. From 2020 onwards, the number of working-age citizens will decline, as older Singaporeans retiring outnumber younger ones starting work. At our current low birth rate, our citizen population will age rapidly, and also start declining from 2025, if we do not take in any new immigrants.

This White Paper sets out the key considerations and roadmap for Singapore's population policies to address this demographic challenge. It outlines the Government's policies to maintain a strong Singaporean core in the population, regulate how many new Singapore citizens (SCs) and permanent residents (PRs) we take in, create jobs and opportunities for Singaporeans, build a high quality living environment, as well as strengthen our identity and society.

THREE PILLARS FOR A SUSTAINABLE POPULATION FOR A DYNAMIC SINGAPORE

A sustainable population for Singapore rests on three key pillars.

First, Singaporeans form the core of our society and the ***heart*** of our nation. To be a strong and cohesive society, we must have a strong Singaporean core. Strong families are the bedrock of our society, through which we pass on our values and sense of belonging from one generation to the next. We may

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have diverse geographical and ethnic backgrounds, but we are all Singaporean because we share certain key values and aspirations, including meritocracy, a fair and just society, and respect for one another's culture within a broad common space where all interact and bond.

Second, our population and workforce must support a dynamic economy that can steadily create good jobs and opportunities to meet Singaporeans' ***hopes*** and aspirations. Many Asian cities are modernising rapidly, and catching up on us. Singapore must continue to develop and upgrade to remain a key node in the network of global cities, a vibrant place where jobs and opportunities are created. A dynamic economy will provide us with more resources and room to pursue inclusive growth strategies to benefit all segments of our society.

Third, we must continue to keep Singapore a good ***home***. Our city must continue to be well-managed, well-planned, and well-developed. We must meet the infrastructure needs of a changing population and economy in a timely and efficient way, while preserving and enhancing a green environment, so that Singapore can be a unique, bustling 'City in a Garden'.

MAINTAINING A STRONG SINGAPOREAN CORE

In 2011, our Total Fertility Rate (TFR) was 1.20. It has been below the replacement rate of 2.1 for more than three decades. Low and falling TFR is not unique to Singapore. Many developed Western countries, and East Asian societies such as Hong Kong, Japan and Taiwan, suffer the same problem.

To help Singaporeans achieve their dreams to marry and have children, we introduced a Marriage & Parenthood Package in 2001, and enhanced it in 2004 and 2008. We are further enhancing the Package this year to: (a) enable couples to get housing faster and more easily, so that they can marry and start families earlier; (b) provide support for conception and delivery costs; (c) further defray child-raising costs, including healthcare costs; (d) enhance work-life measures to help working couples balance work and family commitments; (e) signal to fathers to play a bigger role through paternity and shared parental leave.

We will continue to welcome immigrants who can contribute to Singapore, share our values and integrate into our society. More Singaporeans are marrying non-Singaporeans. About 40% of Singaporean marriages each year are between a Singaporean and a non-Singaporean – some 9,000 in 2011 alone.

We do not expect our TFR to improve to the replacement rate of 2.1 in the short term. Taking in younger immigrants will help us top up the smaller cohorts of younger Singaporeans, and balance the ageing of our citizen population. To stop our citizen population from shrinking, we will take in between 15,000 and 25,000 new citizens each year. We will review this immigration rate from time to time, depending on the quality of applicants, our birth rates, and our changing needs.

Permanent residence is an intermediate status through which foreigners take up citizenship. It is meant for those who have a long-term stake in Singapore and intend to sink roots here. We have tightened up significantly on the number of PRs granted each year. We have come down from a high of 79,000 new PRs in 2008 to about 30,000 each year currently. We plan to maintain the current pace. This will keep a stable PR population of between 0.5 and 0.6 million, and ensure a pool of suitable potential citizens.

We will continue to encourage and help new citizens integrate into our society. We would like them to

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adapt to our way of life, while enriching the diverse experiences, skills and capabilities in our society.

With this controlled immigration rate, the citizen population is projected to be between 3.6 and 3.8 million by 2030. Together with the PR population of 0.5 to 0.6 million, this gives a resident population (comprising citizens and PRs) of between 4.2 and 4.4 million in 2030, depending on birth rates, immigration and life expectancy.

CREATING GOOD OPPORTUNITIES FOR SINGAPOREANS

The Singaporean workforce is becoming progressively better qualified, as better educated young Singaporeans start work, and existing workers upgrade themselves through continuing education and training. We anticipate a significant upgrading of the Singaporean workforce towards Professional, Managerial, Executive and Technical (PMET) jobs. By 2030, the number of Singaporeans in PMET jobs is expected to rise by nearly 50% to about 1.25 million compared to 850,000 today, while the number in non-PMET jobs is expected to fall by over 20% to 650,000 compared to 850,000 today. Overall, two-thirds of Singaporeans will hold PMET jobs in 2030, compared to about half today. We will continue to provide opportunities to non-PMET Singaporeans, and help them to upgrade and upskill, as well as ensure that they are treated fairly and their pay recognises the increases in their contribution.

To create good jobs and opportunities for Singaporeans, we need a dynamic economy and businesses that produce goods and services not just for Singapore, but for the region and the world. Our economy must stay ahead of other Asian cities, so that we can provide them with the high-end goods and services that they need but are not yet able to produce themselves. Our businesses will need a workforce with the full range of skills, backgrounds and experiences who can kick-start high value-added emerging sectors, and understand regional and international markets. This requires a complementary workforce of Singaporeans and foreigners.

Foreign workers can provide skills and expertise, as well as market knowledge and access, to enable Singapore-based companies to create new products and penetrate new markets to serve the region and beyond.

Foreign workers help to create the right balance of skilled and less-skilled workers in the overall workforce. As Singaporeans upgrade themselves into higher-skilled jobs, more of the lower-skilled jobs will have to be done by foreigners.

Foreign workers also provide healthcare, eldercare and domestic services to support our ageing population and working families. They build infrastructure and housing, and do conservancy and maintenance work. They thus enable Singaporeans to enjoy good social and municipal services at a moderate cost, contributing to our quality of life.

Foreign workers enable businesses to expand quickly and flexibly during economic booms. They also buffer Singaporean workers from job losses during downturns.

We thus continue to need a significant number of foreign workers to complement the Singaporean core in the workforce.

However, we cannot allow in an unlimited number of foreign workers. We do not want to be overwhelmed by more foreign workers than we can absorb, or to expand our total population beyond what our island is able to accommodate. Too many foreign workers will also depress wages and reduce the incentive for firms to upgrade workers and raise productivity.

For the rest of this decade, as the growth of our Singaporean workforce slows, our total workforce growth will also slow to about 1% to 2% per year, half of the 3.3% per year over the past 30 years. Beyond 2020, workforce growth will slow down further to about 1% per year as the population ages and the Singaporean workforce starts to plateau.

We must thus rely less on foreign labour, use our resources better, and redouble efforts to improve

productivity. That is the only sustainable way to grow the economy and raise real wages. However, over time as our economy matures and undergoes major demographic shifts, sustaining high productivity growth will also become harder.

Up to 2020, if we can achieve 2% to 3% productivity growth per year (which is an ambitious stretch target), and maintain overall workforce growth at 1% to 2%, then we can get 3% to 5% Gross Domestic Product (GDP) growth on average. But over the whole period, GDP growth is more likely to average 3% to 4%, though we may exceed that in good years.

Beyond 2020, Singapore will continue to enjoy good prospects so long as we remain competitive and are able to plug into Asia's growth. We may see GDP growth of between 2% and 3% per year from 2020 to 2030. However, actual economic growth will depend on many factors: our external environment, our productivity and workforce growth, how dynamic and creative Singaporeans are, and how well we work together, compared to people in other cities.

HIGH QUALITY LIVING ENVIRONMENT

We want Singapore to continue to be one of the best places to live in the world – a city for all age groups, and a country we are proud to call home.

We will invest in our infrastructure and create high quality urban spaces, offering convenient access to amenities, transport nodes and services. Our rail network will expand by about 100 km to a total length of 280 km by 2021. We will build more public housing, hospitals and care facilities. With new parks and park connectors, Singaporeans will continue to enjoy accessible and interconnected green spaces all around Singapore.

We will continue to explore new technology and innovative solutions to expand and optimise our land use. The National Research Foundation has allocated $135 million for research and development into land and liveability, focusing on creating new space cost-effectively and optimising the use of space.

By planning our infrastructure developments well in advance, and implementing them in a timely and effective way, we can overcome our current strains and congestion, and accommodate a larger population.

POPULATION TRAJECTORIES

The roadmap in this White Paper puts us on possible population trajectories to meet the present and future needs of Singapore and Singaporeans.

Singapore's total population of residents and non-residents in 2020 is projected to be between 5.8 and 6 million, depending on our fertility trends, life expectancy, as well as our social and economic needs. The resident population (comprising citizens and PRs) is projected to be 4 to 4.1 million, of which citizens alone will make up 3.5 to 3.6 million.

By 2030, Singapore's total population could range between 6.5 and 6.9 million. There is a wider band of uncertainty, and the actual population will again depend on factors such as our fertility trends and life expectancy, the global and regional environment, our economic structure and social needs. The resident population (comprising citizens and PRs) is projected to be 4.2 to 4.4 million, of which citizens alone will make up 3.6 to 3.8 million.

CONCLUSION

Our population challenges are complex and multi-faceted, and have far-reaching effects on our current and future generations. There are no simple solutions.

We need to find a balance. If we do too little to address the demographic challenge, we risk becoming a steadily greying society, losing vitality and verve, with our young people leaving for opportunities elsewhere. But if we take in too many immigrants and foreign workers, we will weaken our national identity and sense of belonging, and feel crowded out of our own home. This White Paper aims for a judicious balance to achieve our goal of: A Sustainable Population for a Dynamic Singapore.

We must plan well ahead in order to build the best home for Singaporeans, both current and future. A home where we care for one another, and feel a sense of belonging and pride. A home for Singaporeans to bring up families and nurture children. A home where the old live their silver years with grace and dignity, and the young have exciting opportunities and bright futures.

CONTENTS

Since March 2012, the Government has been actively seeking views from Singaporeans as part of the preparations for this White Paper.

Many Singaporeans from different walks of life and age groups – including trade unionists, workers, retirees, students, businessmen, professionals, women's groups, overseas Singaporeans, civil servants, bloggers, grassroots leaders, and academics – contributed their views in focus group discussions and dialogue sessions. Singaporeans also wrote in through the www.population.sg website and via e-mail.

Many others expressed their views or wrote articles about this important issue, through other platforms and fora.

We thank everyone for your valuable contributions, which have helped to shape this White Paper.

CHAPTER 1

OUR DEMOGRAPHIC CHALLENGE AND SUSTAINABLE POPULATION OBJECTIVES

SINGAPORE'S DEMOGRAPHIC CHALLENGE

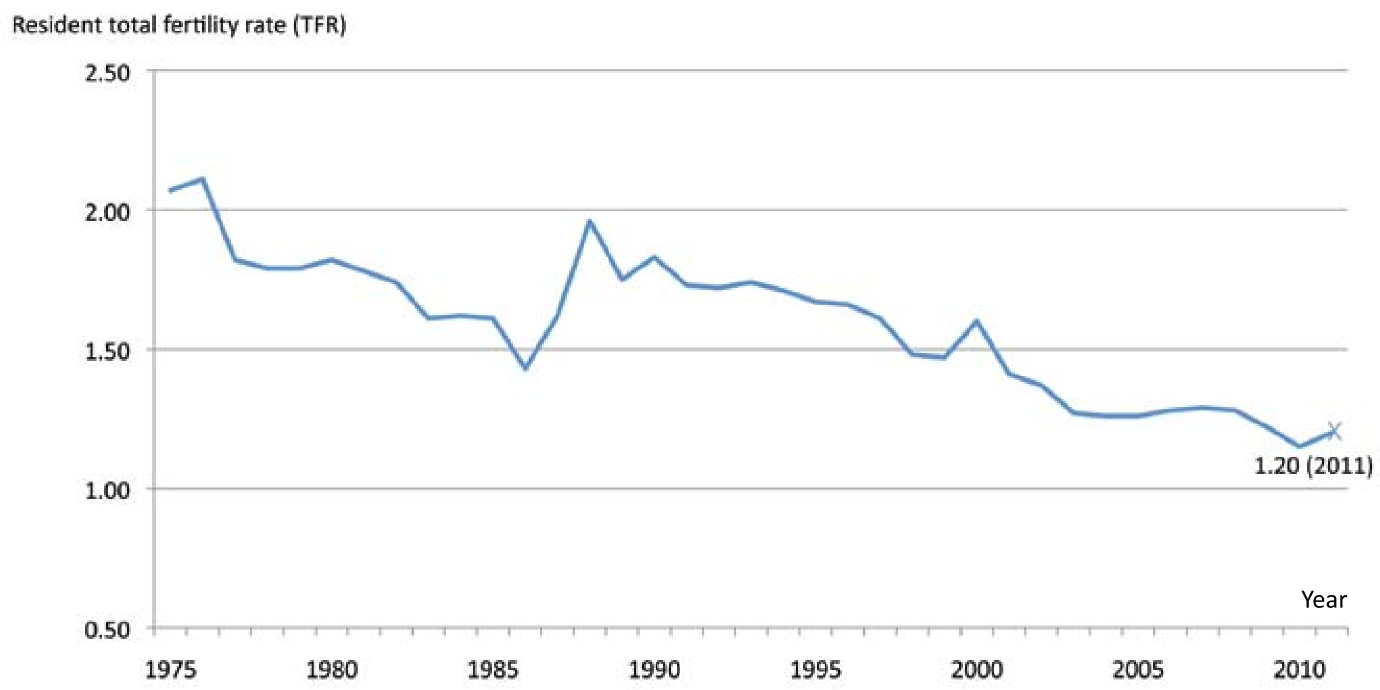
1.1 Our citizen population reached a turning point in 2012, as our first cohort of Baby Boomers turned 65. Singapore will experience an unprecedented age shift between now and 2030. Over 900,000 Baby Boomers, more than a quarter of the current citizen population, will retire from the workforce and enter their silver years.

BIRTH RATES HAVE BEEN DECLINING WHILE LIFE EXPECTANCY IS INCREASING

1.2 As in other East Asian societies like Hong Kong, Japan and Taiwan, Singapore's birth rates have been falling, due to rising singlehood, later marriages, and married couples having fewer children. Broader social and economic factors also affect marriage and parenthood decisions. For example, with more opportunities to pursue higher education, people are starting work and getting married later.

1.3 In 2011, our Total Fertility Rate (TFR) was 1.20. Our TFR has been below the replacement rate of 2.1 for more than three decades (see **Chart 1.1**).

Chart 1.1: Singapore's Falling Total Fertility Rate



Data prior to 1980 pertain to the total population.
Source: DOS

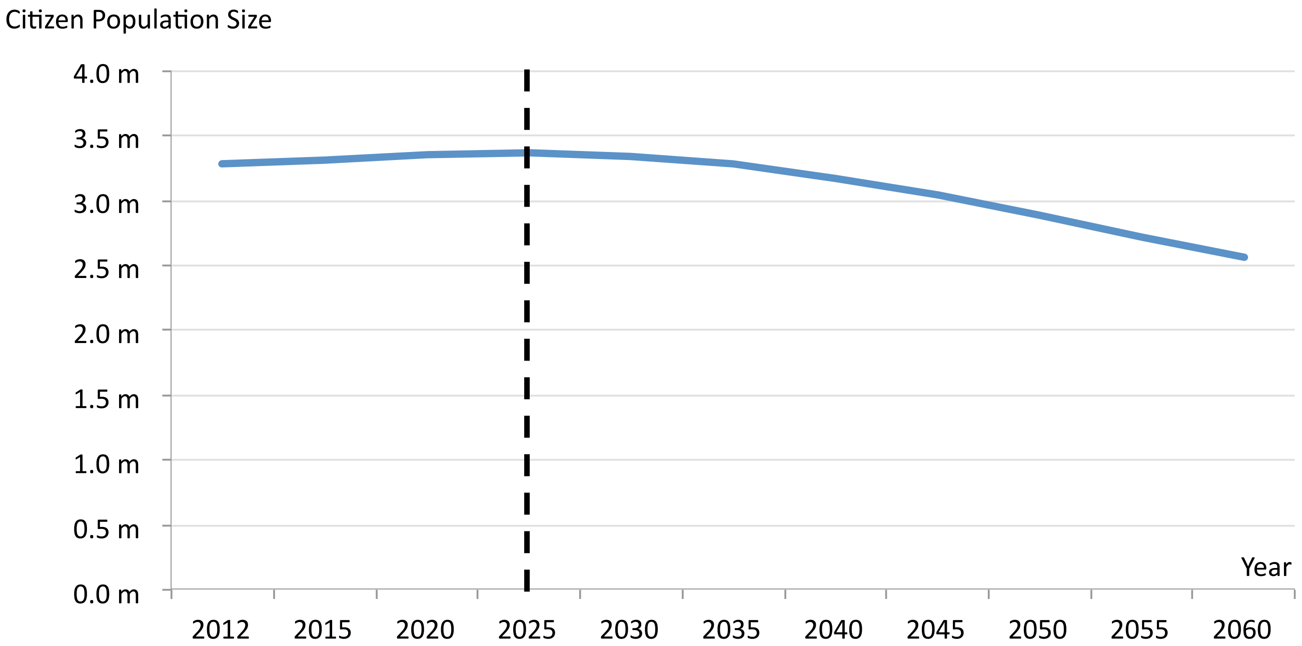
1.4 At the same time, Singapore's life expectancy has increased from 66 years in 1970 to 82 years in 2010, making it one of the highest in the world.

WE HAVE AN AGEING AND SHRINKING CITIZEN POPULATION AND WORKFORCE

1.5 Falling birth rates coupled with increasing life expectancies will result in an ageing and shrinking citizen population and workforce.

1.6 At current birth rates and without immigration, our citizen population will shrink from 2025 onwards. The median age of citizens will also rise from 40 years today to 45 in 2025 (see **Chart 1.2**).

Chart 1.2: Shrinking and Ageing Citizen Population

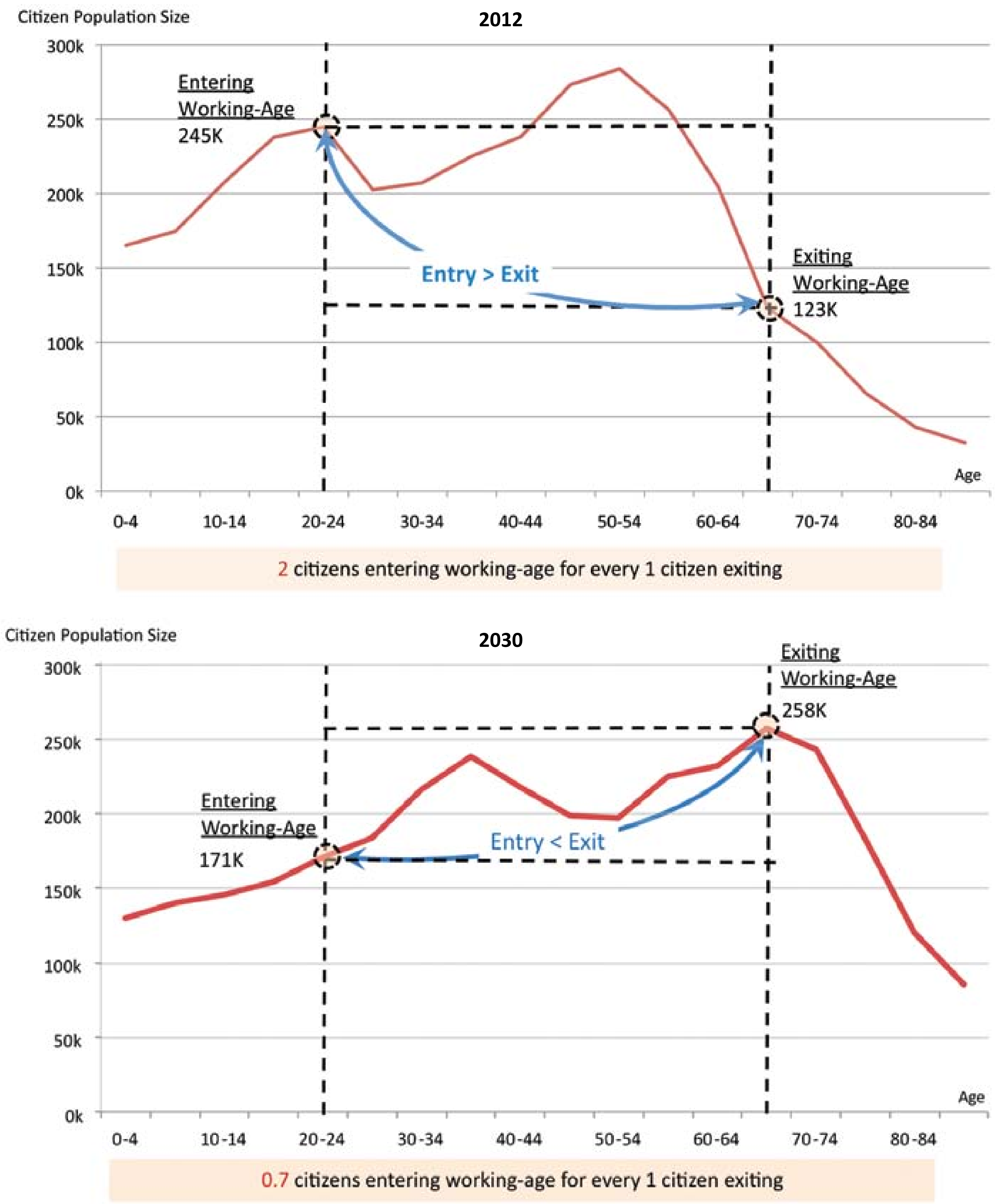


Median Age							
	40	43	45	47	50	53	55

Assuming current birth rates and no immigration from 2013 onwards
Source: DOS

1.7 The number of citizens in the working ages of 20 to 64 years will decline from 2020 due to more citizens retiring and fewer citizens entering the workforce (see **Chart 1.3**). It will become increasingly difficult to grow our workforce through our citizen population alone, unless we succeed in reversing the declining fertility trend.

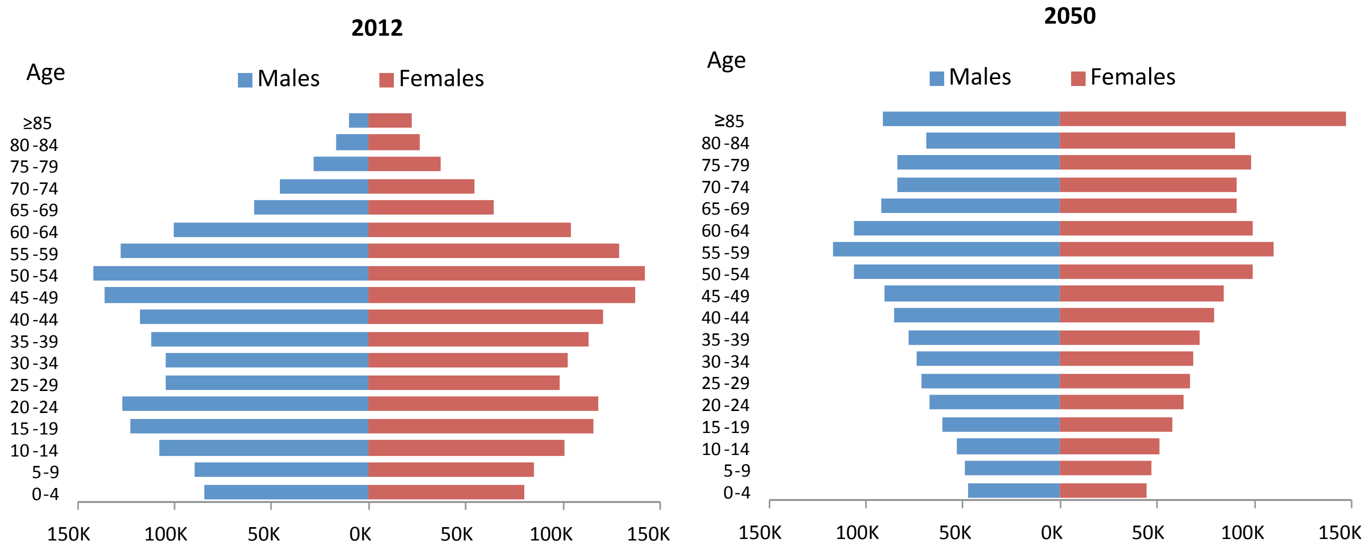
Chart 1.3: Entry and Exit of Citizens from Working-Ages



Assuming current birth rates and no immigration from 2013 onwards
Source: DOS

1.8 Our citizen age profile will also shift (see **Chart 1.4**). Whereas today we have relatively few citizens aged 65 and above compared to those below 65, this will change over the years as people live longer and each successive generation decreases in size. Eventually, we will have many more older Singaporeans than younger ones. Today, families generally have a few elderly members with a larger number in the younger generations. By 2030, this family structure is likely to reverse itself with more elderly members than younger ones. By 2050, Singapore will have an inverted population structure with more in the older age groups than the younger age groups.

Chart 1.4: Our Changing Citizen Age Profile

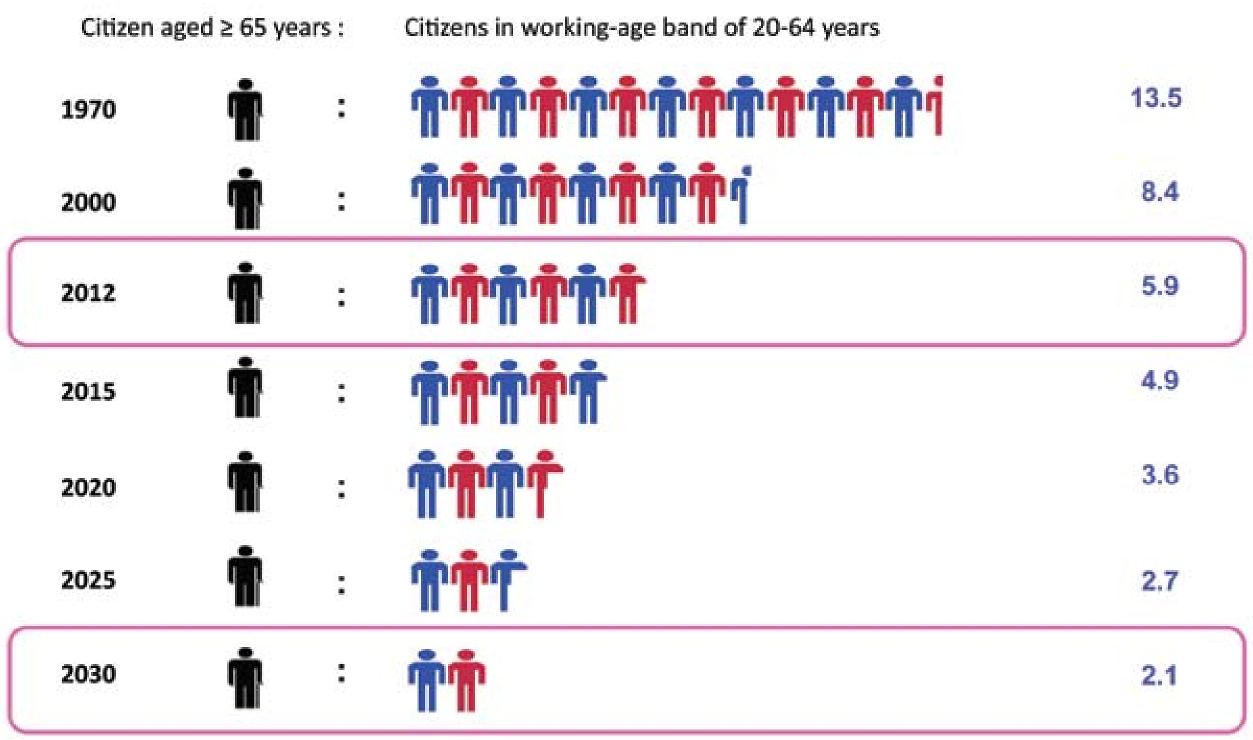


Assuming current birth rates and no immigration from 2013 onwards.
Source: DOS

1.9 The number of citizens aged 65 and above will triple to 900,000 by 2030 and will be supported by a declining base of working-age citizens. We currently have 5.9 working-age citizens for each citizen aged 65 and above. This ratio will fall to 2.1 by 2030 (see **Chart 1.5**). We need to mitigate this by creating more opportunities for Singaporeans to continue working beyond the current retirement age, and encouraging employers to tap this increasing pool of experienced older workers. Nevertheless, the support ratio will still fall significantly.

1.10 For society as a whole, a declining old-age support ratio would mean rising taxes and a heavier economic load on a smaller base of working-age Singaporeans. A shrinking and ageing population would also mean a smaller, less energetic workforce, and a less vibrant and innovative economy. Companies may not find enough workers. Business activity would slow, and job and employment opportunities would shrink. It would become more difficult to match the higher aspirations of a better educated and mobile population. Young people would leave for more exciting and growing global cities. This would hollow out our population and workforce, and worsen our ratio of younger to older Singaporeans.

Chart 1.5: Declining Old-Age Support Ratio



Assuming current birth rates and no immigration from 2013 onwards
Source: DOS

1.11 These significant demographic issues will quickly be upon us. We need to take action early, so that we can address them in a measured and calibrated way. This is the way to overcome these challenges, secure a good future for Singapore and Singaporeans, and create a home with citizens at its heart.

SUSTAINABLE POPULATION OBJECTIVES

1.12 Our population policies will shape the future for ourselves and our children. Our vision for a sustainable population is founded on three key pillars:

Singaporeans at the Heart of Our Nation

Strong & Cohesive Society
Growing Strong Families & Building a Cohesive Community

Dynamic & Vibrant Economy
Creating Good Jobs & Employment Opportunities

High Quality Living Environment
Being a City for All Ages

STRONG AND COHESIVE SOCIETY

1.13 Singaporeans form the core of our society and the ***heart*** of our nation. To be a strong and cohesive society, we must have a strong Singaporean core. Our forebears may have come from different lands, and we may be of different races, but we are all Singaporean, because we share certain key values and aspirations, including meritocracy, a fair and just society, and respect for one another's culture within a broad common space where all interact and bond.

1.14 Strong families are the bedrock of our society, through which we pass on our values and sense of belonging from one generation to the next. We want older Singaporeans to be able to live their silver years with grace and dignity; and younger Singaporeans to see their future in Singapore, as the place where they will bring up their families.

1.15 Many Singaporeans also want a more caring and gracious society, where individual differences are respected and where we show consideration for one another; where there will be a place for all Singaporeans, young or old, single or married, in our society. A dynamic economy will provide us with more resources and options to pursue inclusive growth and benefit all segments of our society.

DYNAMIC AND VIBRANT ECONOMY

1.16 The world is changing rapidly. Many Asian cities are modernising, and catching up on us. A network of leading cities is attracting talent and enterprise, creating new ideas and breakthroughs, and setting the pace for other regions and cities.

1.17 To remain one of these cities, Singapore must continue to develop and upgrade. We are investing in our people, opening up more educational pathways and expanding Continuing Education and Training. Our population and workforce structure must support a dynamic and vibrant economy, for only then can we provide diverse job opportunities to meet the rising aspirations of Singaporeans.

1.18 A dynamic economy will provide new generations of Singaporeans with ***hope*** for the future, where there are many paths to success. Every Singaporean can have a chance for success if he or she is prepared to work hard, regardless of family background or personal circumstances.

HIGH QUALITY LIVING ENVIRONMENT

1.19 We must continue to keep Singapore a good ***home***. Our city must continue to be well-managed, well-planned, and well-developed.

1.20 We must meet the infrastructure needs of a changing population and economy in a timely and efficient way. We need to do so creatively and innovatively, so that Singaporeans can continue to enjoy a high quality living environment.

1.21 We will have high quality urban spaces, with convenient access to amenities, transport nodes and services, while preserving and enhancing a green environment, so that Singapore can be a unique, bustling 'City in a Garden'.

ROADMAP FOR POPULATION POLICIES

1.22 This White Paper sets out the key considerations and roadmap for Singapore's population policies to address our demographic challenge. It outlines the Government's policies to maintain a strong Singaporean core in the population, calibrate how many new citizens and PRs we take in, create jobs and opportunities for Singaporeans, build a high quality living environment, as well as strengthen our identity and society.

SUMMARY

Our citizen population reached a turning point in 2012, as our first cohort of Baby Boomers turned 65. From 2020 onwards, the number of working-age citizens will decline, as Singaporeans retiring outnumber those starting work. At our current low birth rate, our citizen population will age rapidly, and start declining from 2025, if we do not take in any immigrants to make up for the smaller numbers in our younger age groups.

Singapore's sustainable population rests upon three key pillars.

First, Singaporeans form the core of our society and the ***heart*** of our nation. To be a strong and cohesive society, we must have a strong Singaporean core.

Second, our population and workforce must support a dynamic economy that can steadily create good jobs and opportunities to meet Singaporeans' ***hopes*** and aspirations.

Third, we must continue to keep Singapore a good ***home***, with a high quality living environment.

CHAPTER 2
SUSTAINING A CORE SINGAPOREAN POPULATION

SUSTAINING A CORE SINGAPOREAN POPULATION

2.1 The key to maintaining a strong and cohesive Singapore society is to have strong families. Strong families are the bedrock of our society, in which children are nurtured, and through which we pass on our values and sense of belonging from one generation to the next. In addressing our demographic challenge, the Government places priority on providing a supportive environment for Singaporeans to form families and raise children.



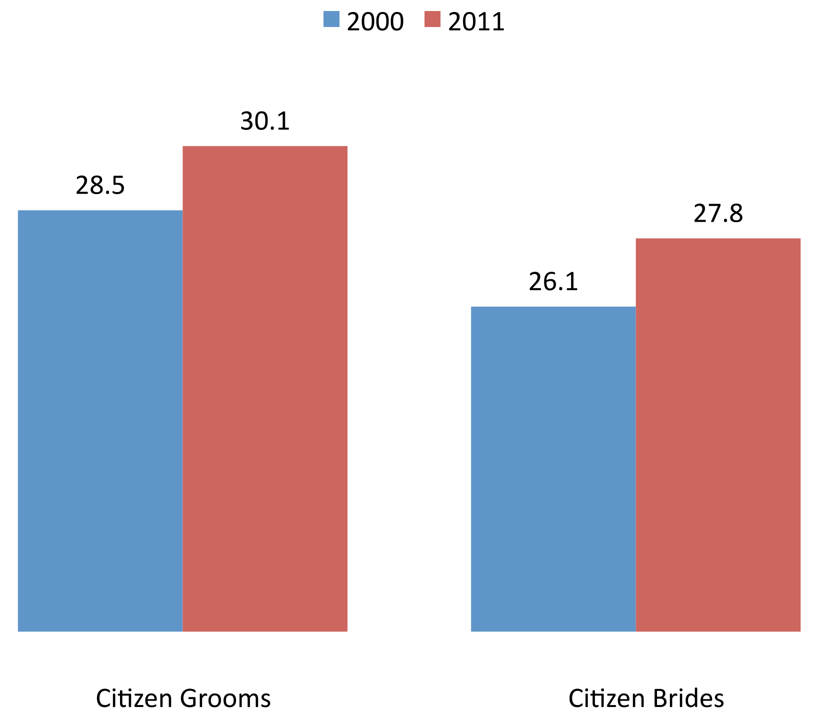

KEY MARRIAGE AND PARENTHOOD TRENDS

2.2 More Singaporeans are remaining single or marrying later, and married couples are having fewer children. Singlehood rates have increased since 2000 for both men and women. Among Singaporeans between the ages of 30 and 34, more than 4 in 10 men and 3 in 10 women are still single (see **Chart 2.1**). The median age of citizens at first marriage has risen between 2000 and 2011, from 28.5 to 30.1 years for grooms, and from 26.1 to 27.8 years for brides (see **Chart 2.2**).

Chart 2.1: Proportion of Citizen Singles by Age Group and Sex

Source: DOS

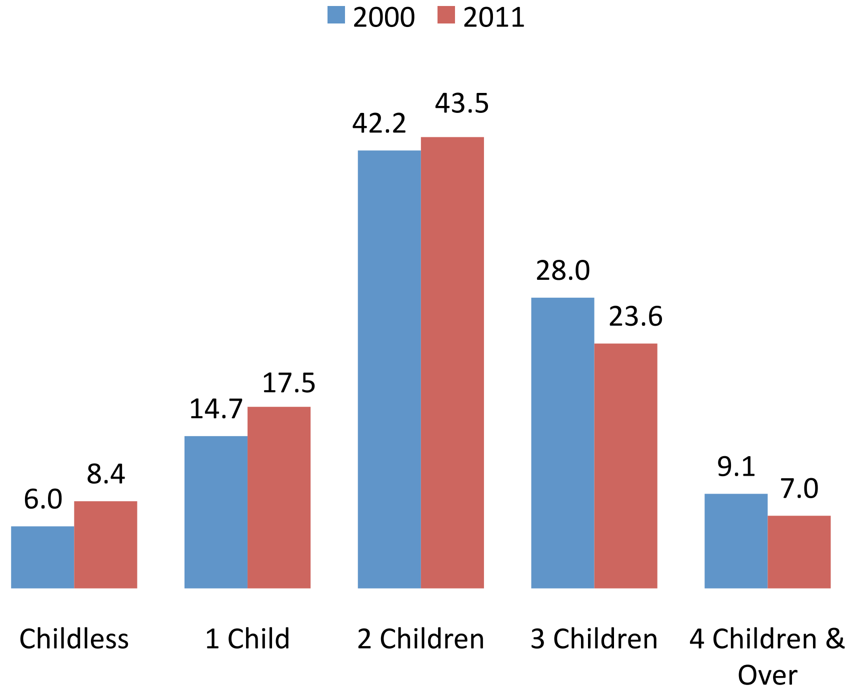
Chart 2.2: Median Age of Citizens at First Marriage (Years)



Source: DOS

2.3 As Singaporeans marry later, they tend to have fewer children. Most families still have two or more children, although the average number of children born to citizen ever-married women aged 40-49 has fallen from 2.22 in 2000 to 2.06 in 2011. At the same time, the proportion of women having one child or none is rising, from 21% in 2000 to 26% in 2011 (see **Chart 2.3**).

Chart 2.3: Distribution of Citizen Ever-Married Females aged 40-49, by Number of Children Born (%)



Source: DOS

ENCOURAGING MARRIAGE AND PARENTHOOD

2.4 Over the past year, we have received many useful views and suggestions on how to encourage marriage and parenthood. Multi-faceted factors affect Singaporeans' decisions to get married and have children (see **Diagram 2.4**). There were practical concerns about access to housing, the availability and cost of child care, healthcare expenses and other costs of raising a family. Both men and women also expressed the desire for better work-life harmony to fulfil their family and career aspirations. Many reflected on the importance of family values and the need to encourage Singaporeans to put family aspirations first. Others pointed out that it is ultimately values and social attitudes that will determine Singaporeans' personal decisions on marriage and parenthood.

Diagram 2.4: Keywords from Public Feedback on Encouraging Marriage and Parenthood

IMPORTANCE OF SOCIETY AND FAMILY VALUES

2.5 The 2012 Marriage and Parenthood Study showed that 83% of singles intend to get married, and 84% of those who are married intend to have two or more children. But we need to shape our whole society to foster a pro-family culture where starting and raising a family are central to our life choices and fulfilment.

2.6 We need to put families first, celebrate family life, and support couples in having children.

- At home, we want to see more sharing of parental responsibilities between husband and wife, and support from grandparents to help nurture our children. 99% of married respondents in the 2012 Marriage and Parenthood Study agreed that fathers and mothers are equally important as caregivers for children.
- At work, employees will be better able to manage and balance their work and life commitments if employers can better understand the needs of their single and married employees, both men and women, and be supportive through positive attitudes and workplace practices.
- In the community, business owners who offer family-friendly amenities, such as nursing rooms and family parking lots, can also help to make raising families a positive experience.

2.7 These efforts will go a long way in transforming Singapore and the way we view family life and having children. The journey to bring up children will be smoother and more rewarding when everyone plays their part in supporting a family-friendly environment at home, at work and in the community.

MARRIAGE & PARENTHOOD PACKAGE ENHANCED

2.8 The Government remains committed to helping Singaporeans achieve their aspirations of getting married and having children. Introduced in 2001, Singapore's Marriage & Parenthood Package was progressively enhanced in 2004 and 2008.

2.9 We will further enhance the Marriage & Parenthood Package this year. The new measures and enhancements draw on suggestions made by Singaporeans in the public engagement over the past year, and will increase the cost of the package from $1.6 billion per year to $2 billion per year (see Box on *Enhancements to the Marriage & Parenthood Package*).

2.10 The enhanced leave policies provide support for couples to balance work and family commitments. As more families have both parents working, both father and mother have to share the responsibilities of parenthood and provide each other with mutual support. The introduction of paternity and shared parental leave encourages shared parental responsibility, and supports fathers in the important role they play in bringing up children.

2.11 The enhancements complement the existing measures in the Marriage & Parenthood Package, which include the Medisave Maternity Package, Child Development Account, Parenthood Tax Rebate, Qualifying Child Relief and others.

2.12 Under the enhanced package of measures, a middle-income Singaporean family with two children can enjoy the equivalent of about $166,000 in benefits until both children turn 13 years old.

2.13 In addition to the measures above, the Government is working on enhancements to the pre-school sector, which will include measures to address infant care and child care affordability.

2.14 The Ministry of Manpower is also studying ways to enhance the Work-Life Works! (WoW!) Fund, to provide incentives for employers to offer flexible work arrangements.

2.15 When ready, these additional measures will complement the current enhancements to the Marriage & Parenthood Package.

ENHANCEMENTS TO THE MARRIAGE & PARENTHOOD PACKAGE

A) MAKING IT FASTER AND EASIER TO GET HOUSING TO SUPPORT EARLIER MARRIAGES AND BIRTHS

i) Parenthood Priority Scheme **<NEW>** which gives priority allocation for new HDB flats to first-timer married couples with children by setting aside a proportion of flats for them.

ii) Parenthood Provisional Housing Scheme **<NEW>** to allow first-timer married couples with children to rent a flat from HDB at an affordable rental rate while awaiting the completion of their flats.

B) CONCEPTION AND DELIVERY COSTS

iii) Enhanced Government co-funding for Assisted Reproduction Technology (ART) treatments, to cover up to 75% of treatment costs, capped at $6,300 per cycle and $1,200 per cycle for 3 fresh and 3 frozen treatment cycles respectively. Co-funding will also now be extended to couples with more than one child.

iv) Accouchement fees in the public hospitals will no longer be differentiated across birth order.

C) FURTHER DEFRAYING CHILD-RAISING COSTS, INCLUDING HEALTHCARE COSTS

v) Enhanced Baby Bonus Cash Gift of $6,000 per child for the first two births, and $8,000 per child for the third/fourth births. This marks an increase of $2,000 per birth over the current Baby Bonus.

vi) Creation of a CPF Medisave account for each citizen newborn with a grant of $3,000 **<NEW>** to further support parents in planning for their children's healthcare needs and encourage early and continuous enrolment in MediShield.

vii) MediShield to be extended to cover congenital and neonatal conditions **<NEW>**, to take effect from 1 March 2013, at the same time as other broader changes to MediShield announced earlier.

D) ENHANCING WORK-LIFE MEASURES TO HELP WORKING COUPLES BALANCE WORK AND FAMILY COMMITMENTS

viii) 2 days of Government-Paid Child Care Leave annually for parents with children aged 7-12, to provide parents of children in primary school with more time to tend to their children's needs. Parents with at least one child below age 7 will continue to have 6 days of Child Care Leave.

ix) 4 weeks of Government-Paid Adoption Leave for working mothers to support bonding with the adopted child in the child's first year.

x) Government-Paid Maternity Benefit **<NEW>** to allow working women who do not currently qualify for any maternity leave (e.g. shorter-term contract workers) to enjoy the Government-paid share of maternity leave in the form of a cash benefit.

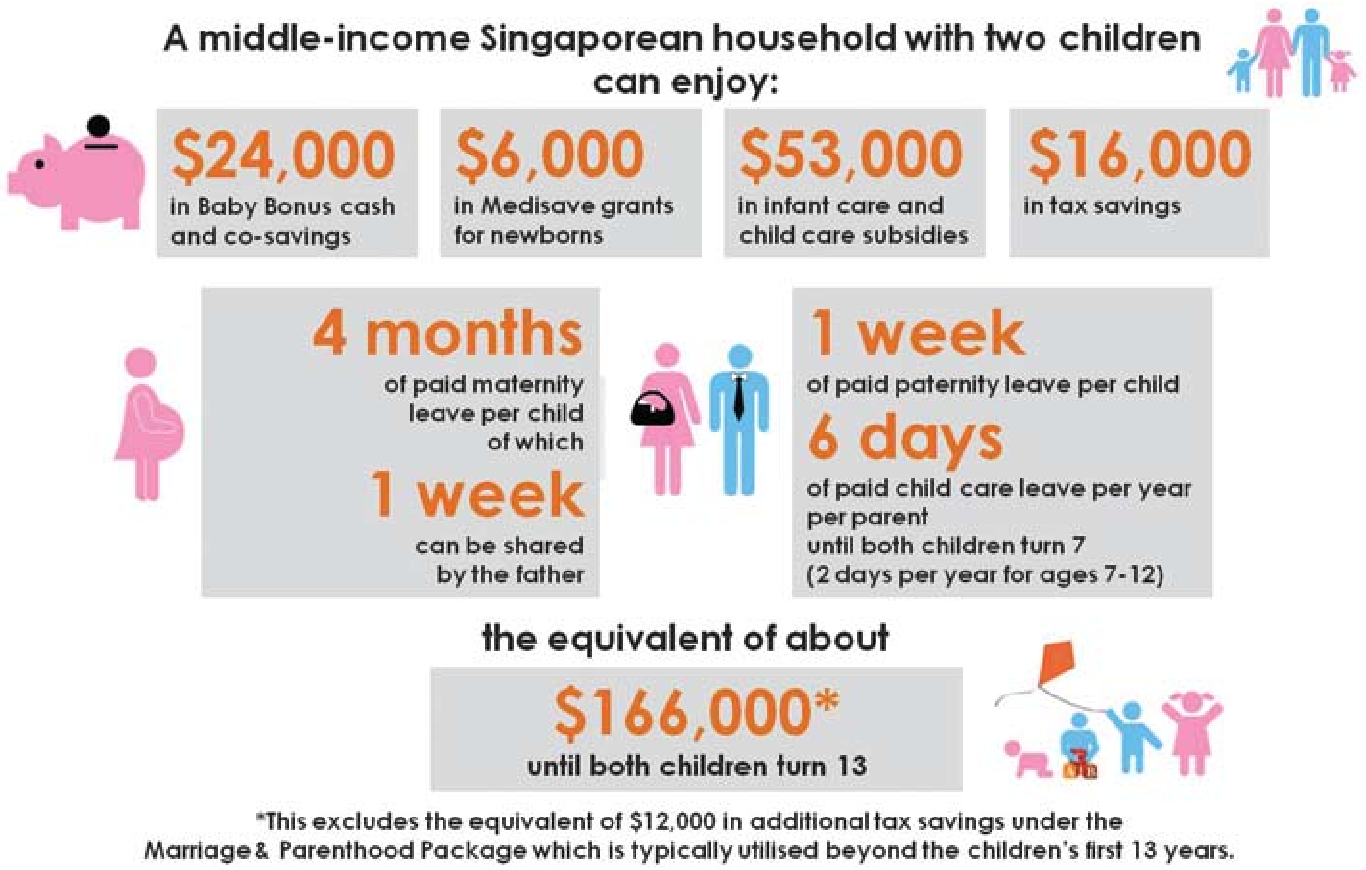
xi) Extended maternity protection period to cover the full term of pregnancy, for employees who are retrenched or dismissed without sufficient cause.

E) SIGNALLING TO FATHERS TO PLAY A BIGGER ROLE IN BRINGING UP THEIR CHILDREN

xii) 1 week of Government-Paid Paternity Leave for fathers **<NEW>**.

xiii) 1 week of Government-Paid Shared Parental Leave **<NEW>** to allow fathers to share 1 week of the working mother's maternity leave entitlement.

(See Annex B for more details on the Marriage & Parenthood Package.)

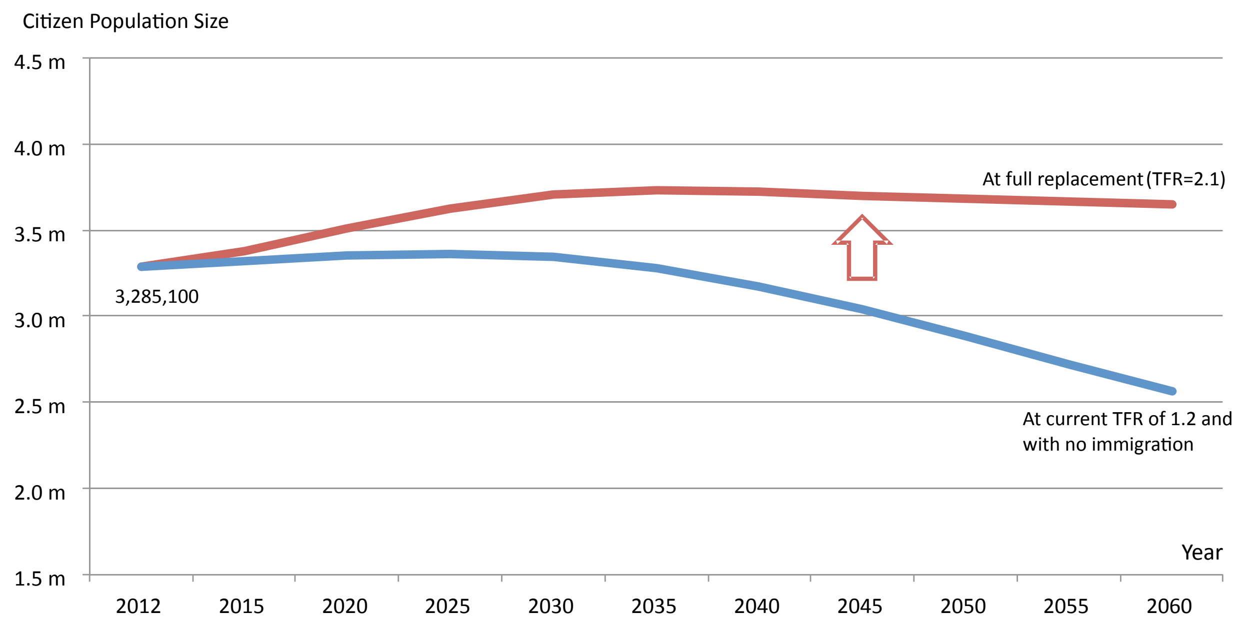


RAISING OUR BIRTH RATE

2.16 We hope that our collective efforts will encourage more Singaporeans to experience the joys of family and children, and nurture the next generation who will grow up to shape the future of Singapore.

2.17 Raising Singapore's birth rate is also critical to maintaining our strong Singaporean core and addressing our demographic challenge (see **Chart 2.5**). This requires the community, employers, families and individual Singaporeans to make the right choices and decisions, collectively and individually.

Chart 2.5: Effect of Raising Birth Rates on Citizen Population Size



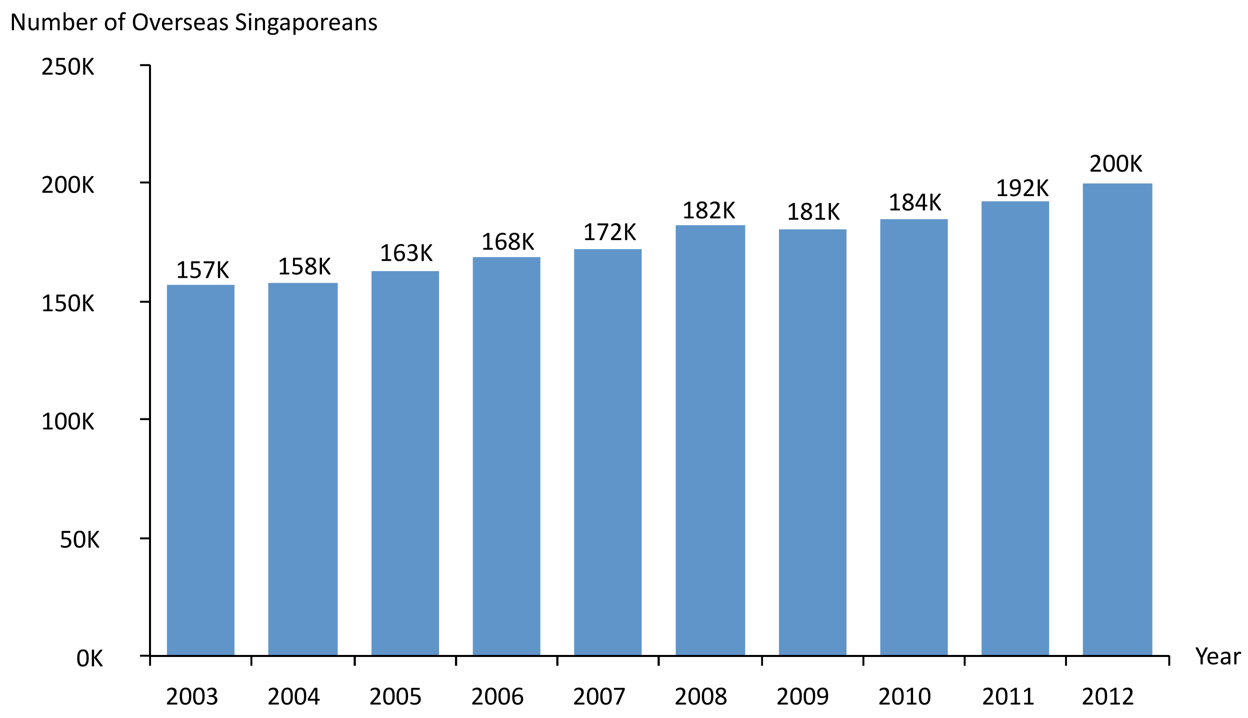
Source: DOS

ENGAGING SINGAPOREANS ABROAD

2.18 Today, there are about 200,000 Singaporeans living overseas (see **Chart 2.6**).[1] Most are working abroad, accompanied by their families. Many young Singaporeans also study abroad. With globalisation, we can expect more Singaporeans to spend time overseas, seeking career opportunities and global exposure.

2.19 Singaporeans living overseas are an integral part of the Singapore family. We are actively engaging our Singaporeans overseas, through events such as Singapore Day, to help them remain emotionally connected to Singapore, and in touch with developments and opportunities back home. We are building vibrant Singaporean communities abroad, with a strong sense of identity and belonging to Singapore. Many Singaporeans living overseas continue to contribute actively to Singapore from around the world. We hope that they will return home after their studies or working stints abroad, adding a further dimension to our society.

Chart 2.6: Overseas Singaporean Population Size, as of June



Source: DOS

[1] This refers to Singaporeans with a registered foreign address or who were overseas for a cumulative period of six months or more in the previous 12 months.

IMMIGRATION POLICY

IMMIGRANTS ADD TO THE DIVERSITY AND AGE-BALANCE OF OUR CITIZEN POPULATION

2.20 At the same time, we will continue to welcome new citizens and permanent residents (PRs) who can contribute to Singapore, add to our diversity, share our values and integrate into society. They supplement our population, and help build a stronger and more sustainable Singaporean core.

2.21 Immigrants bring with them diverse talents, skills, experiences, and knowledge. Diversity in our population supports innovation and entrepreneurship, and adds to our strengths as a society and economy, helping us to adapt to rapidly shifting global trends and rising competition.

2.22 Taking in immigrants who are in the younger age groups also helps to make up for the smaller cohorts of younger Singaporeans, and balance the shrinking and ageing of our citizen population.

2.23 Singapore's immigration policy was last reviewed in 2009, when we tightened the application criteria for Singapore citizenship and permanent residence to moderate the numbers. We take into account factors such as the individual's family ties to Singaporeans, economic contributions, qualifications, age and family profile, to assess the applicant's ability to contribute to Singapore and integrate into our society, as well as his or her commitment to sinking roots. We will continue to refine this framework over time, taking into consideration the needs of Singapore and the quality and background of the applicants.

2.24 Our immigration policy must also take into account the growing proportion of Singaporeans who are marrying foreign spouses, as well as children born to Singaporeans living overseas. In 2011, there were 9,000 marriages registered between a Singaporean and a non-Singaporean. We are also seeing more children born overseas to Singapore citizens. These children are granted citizenship upon registration by their parents. There were about 2,000 such children in 2011.

FOREIGN SPOUSES AND IMMIGRATION

Singapore has seen a rising trend in international marriages over the years. Marriages registered between a Singaporean and a non-Singaporean make up about 4 in 10 of all marriages involving a Singaporean.

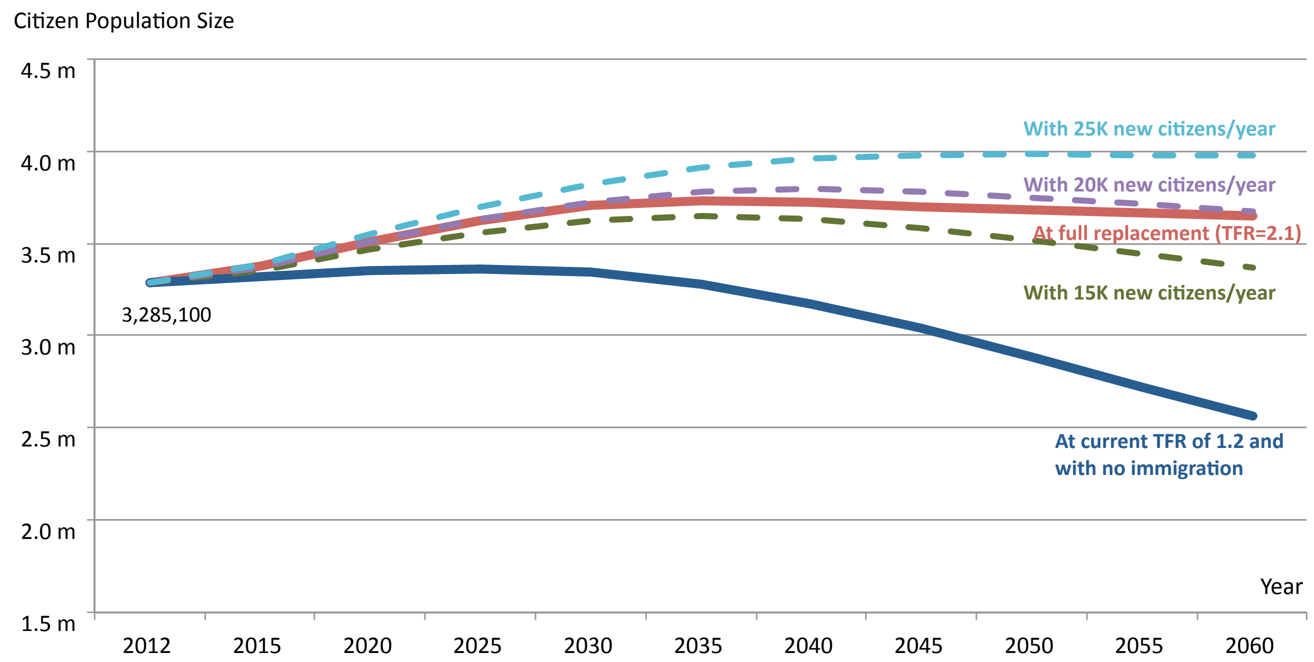
Foreign spouses who do not yet qualify for permanent residence are usually granted a Long-Term Visit Pass (LTVP) to allow them to stay with their families. To better support this group, the LTVP Plus (LTVP+) was introduced in April 2012 for those with citizen children or who have been married for at least 3 years. The LTVP+ grants the holder longer residency, access to in-patient subsidies at restructured hospitals and makes it easier for the holder to seek employment in Singapore.

NEW CITIZENS HELP TO SUSTAIN SINGAPOREAN CORE

2.25 Without immigration, our citizen population will start to shrink from 2025 onwards. To stop our citizen population from shrinking, we will take in between **15,000 and 25,000 new citizens per year** (see **Chart 2.7**). This will be reviewed from time to time, based on the quality of applicants we receive, our birth rates, and changing needs.

2.26 With this calibrated rate of immigration, the citizen population is projected to be **between 3.6 and 3.8 million by 2030**. This will vary with birth rates, immigration and life expectancy.

Chart 2.7: Citizen Population Size Under Various Immigration Scenarios



Source: DOS

PERMANENT RESIDENCE AS AN INTERMEDIATE STEP TOWARDS CITIZENSHIP

2.27 Permanent residence is granted to those who have a long-term stake in Singapore and who intend to sink roots here. It is an intermediate step through which foreigners take up citizenship in Singapore. As with Singapore citizenship, applicants for permanent residence are comprehensively assessed.

2.28 PRs enjoy certain benefits, pegged at levels below what citizens enjoy, while second-generation male PRs are required to serve National Service.

2.29 Since the immigration framework was tightened in 2009, we have significantly reduced the number of PRs granted each year, from a high of 79,000 in 2008. We have been taking in close to 30,000 new PRs in each of the last 3 years, and plan to continue at this calibrated rate. This will keep the total **PR population stable at between 0.5 and 0.6 million**, and ensure a pool of suitable potential citizens.

INTEGRATION OF NEW IMMIGRANTS

2.30 Singaporeans have highlighted that it is important for our new immigrants to fit into our society. Most new immigrants share similar ethnic backgrounds as Singaporeans, but some may take time to integrate into our society and adapt to our norms, culture and values. Their children and subsequent generations are likely to be well integrated as they would have grown up in Singapore and shared many formative experiences.

2.31 We will continue to enhance our integration efforts to help new citizens adapt to our Singaporean way of life and sink deep roots, while adding to Singapore's rich diversity.

2.32 The **Singapore Citizenship Journey** is one key programme that facilitates the integration of new citizens. The National Integration Council (NIC), in partnership with the private and people sectors, will implement more programmes to help new citizens understand our way of life. For example, the NIC is developing videos and booklets to orientate newcomers to Singapore, and our local norms and culture.

2.33 We will also use natural touchpoints, such as schools, National Service and the community sector. Like all Singaporeans, new immigrants are strongly encouraged to get to know their neighbours and participate actively in their community.

2.34 Communicating in a common language also helps promote better understanding and builds bonds. Being able to speak English enables more meaningful interactions between Singaporeans of different races. There are ample opportunities for those wishing to learn English, such as through the courses run by the People's Association and the National Trades Union Congress (NTUC). We will continue to work with providers to raise awareness of such courses and tailor them to the communication needs of new immigrants.

2.35 Effective integration over the long term requires mutual appreciation, trust and sincere relationships to be forged between Singaporeans and new immigrants. Strong community bonds help us to overcome and rise above the occasional tensions that may arise. We should not let isolated events undo the good work that we have done in building a strong and cohesive society. We encourage more Singaporeans to step forward to spread the message of integration and help to foster stronger bonds in our community.

PROJECTED RESIDENT POPULATION SIZE

2.36 With the citizen population projected to be about 3.6 and 3.8 million, and a PR population of about 0.5 to 0.6 million, our resident population (comprising citizens and PRs) is projected to be between 4.2 and 4.4 million in 2030.

SUMMARY

We remain committed to maintaining a strong Singaporean core, and helping Singaporeans achieve their dreams to marry and have children.

Singapore's Marriage & Parenthood Package will be further enhanced this year, with measures to (a) enable couples to get housing faster and more easily; (b) provide support for conception and delivery costs; (c) further defray child-raising costs, including healthcare costs; (d) enhance work-life measures to help working couples to balance work and family commitments; (e) signal to fathers to play a bigger role through paternity and shared parental leave.

We will continue to welcome immigrants who can contribute to Singapore, share our values and integrate into our society. To stop our citizen population from shrinking, we will take in between 15,000 and 25,000 new citizens each year. We will review this immigration rate from time to time, depending on the quality of applicants, our birth rates, and our needs.

We plan to take in about 30,000 new PRs each year. This will maintain a stable PR population of between 0.5 and 0.6 million, to ensure a pool of suitable potential citizens.

We will continue to encourage and help new citizens to integrate into our society. We would like them to adapt to our way of life, while enriching our society with their diverse experiences, skills, and capabilities.

Together with a citizen population of between 3.6 and 3.8 million, our resident population (comprising citizens and PRs) is projected to be between 4.2 and 4.4 million in 2030, depending on birth rates, immigration and life expectancy.

CHAPTER 3
CREATING GOOD OPPORTUNITIES FOR SINGAPOREANS

ECONOMIC VISION

3.1 Our vision is to build a globally competitive and vibrant economy, one which sustains inclusive growth, creates opportunities and good jobs for our people, and helps Singaporeans achieve their aspirations.

3.2 Without growth, we would be unable to create good jobs or raise overall wages. Unemployment would rise.[2] With growth we can not only do this, but also have more resources to help lower-income households.[3]









[2] A comparison of advanced countries shows that incomes grow faster when economic growth is good. Poor growth may also affect employment prospects, especially for lower-educated workers. Details can be found in *"MTI Occasional Paper on Population and Economy"*, 2012.

[3] Government revenue comes mostly from income taxes, consumption taxes and asset taxes, all of which are dependent on economic growth. Economic growth has allowed the Government to introduce various transfer schemes to help lower-income Singaporeans, such as the Goods and Services Tax (GST) Voucher scheme.

OUR CHANGING DEMOGRAPHIC PROFILE

3.3 At current birth and immigration rates, there will soon be fewer Singaporeans joining the workforce and more retiring from it. The citizen workforce will age, and its size would start to plateau from 2020.

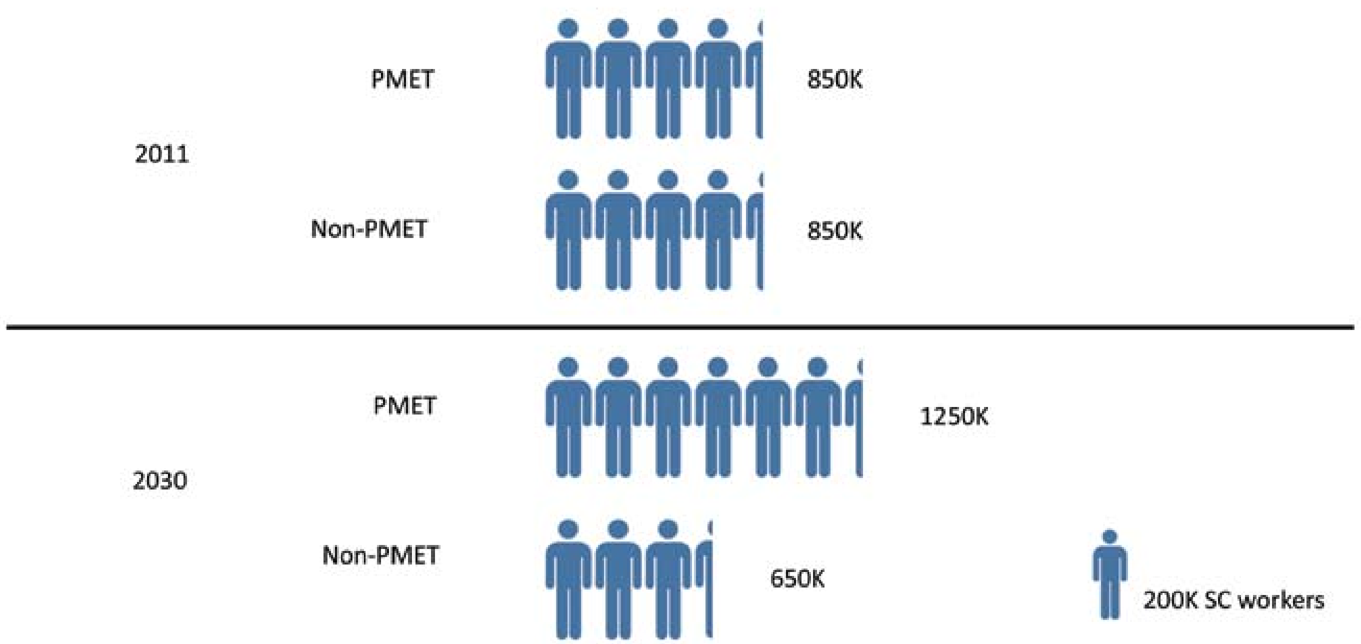
3.4 Singaporeans are becoming better educated, with more opportunities to pursue higher education. Today, 70% of citizens aged 25-29 have diploma qualifications and above, compared to 29% of those aged 45-49. More Singaporeans have also been upgrading themselves via post-diploma qualifications offered by the polytechnics or vocational pathways in the Workforce Skills Qualifications (WSQ) system.

3.5 By 2030, the number of Singaporeans in Professional, Managerial, Executive and Technical (PMET) jobs is expected to rise by nearly 50% to about 1.25 million compared to 850,000 today, while the number in non-PMET jobs is expected to fall by over 20% to 650,000 compared to 850,000 today. Overall, two-thirds of Singaporeans will hold PMET jobs in 2030, compared to about half today (see **Chart 3.1**).

3.6 To create these high-value and good jobs for Singaporeans, we need to:

i. Remain open and globally competitive to tap on Asia's growth;
ii. Help businesses restructure and move up the value chain;
iii. Build a strong and skilled Singaporean core in the workforce; and
iv. Complement the Singaporean core with a foreign workforce.

Chart 3.1: Proportion of Singapore Citizens (SCs) in PMET and Non-PMET Jobs in 2011 and 2030



Assumes current immigration rates
Sources: MTI's estimates and MOM

REMAINING OPEN AND GLOBALLY COMPETITIVE TO TAP ON ASIA'S GROWTH

3.7 Singapore is well-positioned for growth. The 21st century is expected to be an "Asian Century". Asia is likely to continue growing faster than advanced economies in the coming decades.[4]

3.8 In order that two-thirds of Singaporean workers can find PMET jobs, we need a dynamic economy and businesses that produce goods and services not just for Singapore, but for the region and the world. Our economy must stay ahead of other Asian cities, so that we can provide them with the high-end goods and services that they need but are not yet able to produce themselves. Our businesses will need a workforce with the full range of skills, backgrounds and experiences who can kick-start high value-added emerging sectors, and understand regional and international markets. This requires a complementary workforce of Singaporeans and foreigners (see Box on *Growing Professional Services in Singapore*).

GROWING PROFESSIONAL SERVICES IN SINGAPORE

Singapore's skilled workforce and position as a global hub in Asia give us the unique opportunity to capture the growing demand for professional services in Asia. Growing the professional services sector will help us create the high-end, high-value jobs that Singaporeans aspire towards.

For example, there is increasing demand for legal services that span multiple jurisdictions in Asia. This is due to the increase of cross-border business activities and the different legal systems and processes in Asian countries. To meet the growing demand, several international firms like Shearman and Sterling (US) and Beachcroft (UK) have opened new offices in Singapore to advise on pan-Asian legal matters.

Accounting and consulting firms are also establishing their global centres of excellence in Asia, to tap the growth in Asian business activities and the growing influence of Asian economies on global issues. International firms like the Boston Consulting Group have recruited many Singaporeans to fill new advisory and research roles in these centres. This has provided Singaporeans with opportunities to work with global clients on their pan-Asian challenges. Some firms like KPMG have also appointed Singaporeans to lead their teams.

The growth of regionally oriented professional services in Singapore creates new high-value job opportunities for Singaporeans.

[4] The Asian Development Bank has projected that Asia will account for half of the world's output by 2050. *"Asia 2050 – Realising the Asian Century"*, Asian Development Bank, 2011.

HELPING BUSINESSES RESTRUCTURE AND MOVE UP THE VALUE-CHAIN

3.9 Our well-educated and skilled workforce, good connectivity, reliable public services, stable government, and rule of law make us an attractive place to do business and give us a competitive edge globally.[5] Our local and foreign workforce mix spurs innovation, contributing to a dynamic and resilient economy. This helps us grow new industries, such as in the biomedical, digital media, petrochemical, advanced electronics, and green energy sectors, creating diverse employment opportunities for Singaporeans. Local brands in logistics, fashion, food, marine, and environmental engineering have also been able to expand abroad.

3.10 As our citizen workforce ages and plateaus, and as we moderate the inflow of foreign workers, it becomes even more important for businesses to restructure and move up the value chain to drive the economic and wage growth needed. To transform our economy, companies need to be innovative and nimble, and our workers must have the right skills, expertise and drive. Businesses can then improve processes, raise productivity, and expand into growing markets in China, India, and our ASEAN neighbours, and Singaporeans can then have better jobs and higher pay.

3.11 The National Productivity and Continuing Education Council oversees Singapore's national effort to raise productivity (see Box on *Continuing Efforts to Improve Productivity*). While our productivity grew by 3.1% per year in the 1990s, it only grew by 1.8% per year between 2000 and 2010 (see **Chart 3.2**). In comparison, between 2000 and 2010, OECD countries achieved 1.2% productivity growth per year: the US managed 1.7%, and Japan 1.0%.[6] Our target of 2% to 3% productivity growth per year in this decade is thus an ambitious stretch target.

[5] The World Bank has ranked Singapore top for ease of doing business, for the 7th consecutive year. *"Doing Business Report"*, World Bank, 2012. Likewise, PricewaterhouseCoopers (PwC) has ranked Singapore first for the ease of doing business. *"Cities of Opportunities"*, PwC, 2012.

[6] Source: OECD Statistics.

CONTINUING EFFORTS TO IMPROVE PRODUCTIVITY

The National Productivity and Continuing Education Council, comprising representatives from Government, business and unions, champions national productivity initiatives. For example:

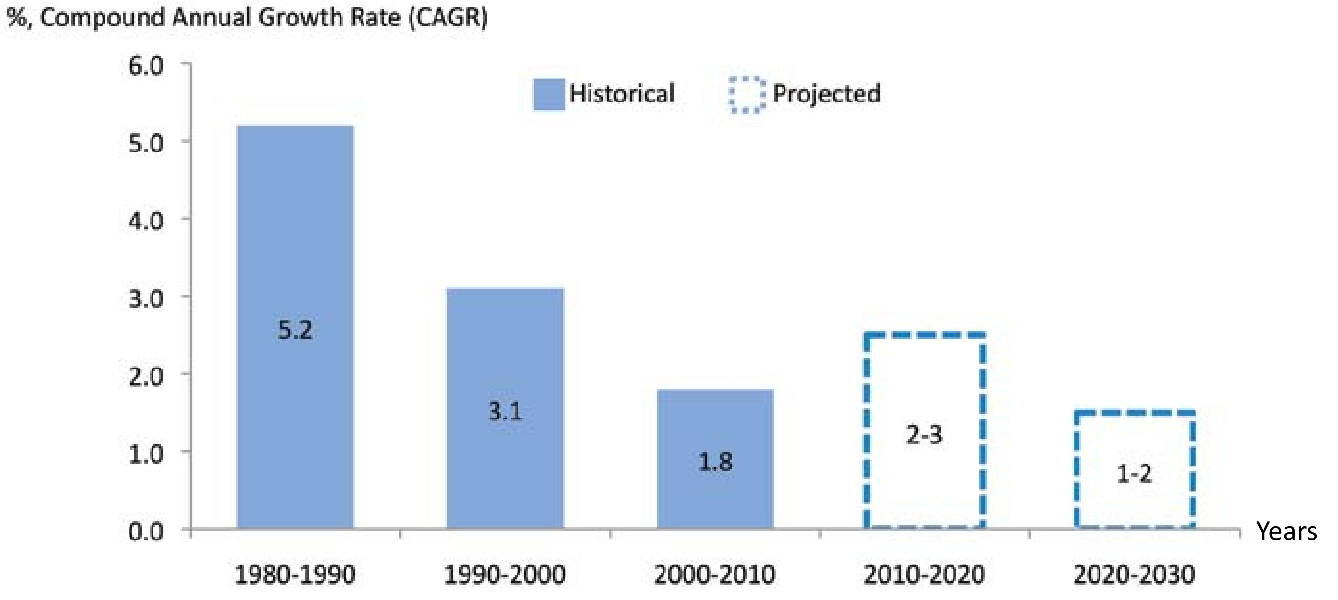
- For businesses, a $2 billion National Productivity Fund supports initiatives such as the Productivity and Innovation Credit and the enhanced Capability Development Scheme.
- For workers, Continuing Education and Training (CET) schemes help Singaporeans upgrade, become more productive, and increase their employability.

At the same time, we have tightened foreign workforce policies to moderate the demand for foreign workers and spur productivity improvements.

- Since July 2010, we have raised foreign worker levies for Work Permit and S Pass holders in all sectors every 6 months, with further announced increases to be phased in till July 2013.
- In 2012, we reduced the Dependency Ratio Ceilings for these workers in the Manufacturing and Services sectors.
- For Employment Pass and S Pass holders, we have raised the qualifying criteria.

3.12 As our economy matures and undergoes major demographic shifts, it will be increasingly difficult for Singapore to sustain the same rate of productivity growth. Even as we make every effort to improve productivity, we expect productivity growth to moderate to 1% to 2% per year between 2020 and 2030.

Chart 3.2: Singapore's Historical and Projected Productivity Growth Rates[7]



Source: MTI

[7] The productivity projection from 2010 to 2020 is based on the Economic Strategies Committee's target. The productivity growth from 2020 to 2030 is assessed to be 1% to 2% per year, similar to the experience of OECD countries over the last decade.

BUILDING A STRONG AND HIGH QUALITY SINGAPOREAN CORE IN THE WORKFORCE

3.13 One clear trend in our citizen workforce is a shift towards better and higher-paying jobs. By 2030, we expect two-thirds of Singaporean workers to hold PMET jobs. The remaining one-third will also be more skilled than non-PMETs today. With a strong and high quality Singaporean workforce, and a dynamic economy, more Singaporeans can access better job opportunities and progress in their jobs.

EDUCATION OPPORTUNITIES

3.14 A fundamental strategy to achieve this is to continue improving access to high quality education, and creating multiple pathways for students with different talents and skills. Singapore's education system offers a wide range of pathways and opportunities so that students can learn in a manner and pace that best suit their aptitudes and interests. Our curriculum is continually reviewed to provide a strong foundation in skills and knowledge to prepare Singaporeans for a rapidly changing future (see Box on *Developing a Strong Core of Singaporeans through a High Quality Education System*).

DEVELOPING A STRONG CORE OF SINGAPOREANS THROUGH A HIGH QUALITY EDUCATION SYSTEM

There will continue to be a wide range of pathways for students, catering to different learning styles, abilities and interests. These include schools offering the 'O' levels and those offering the Integrated Programme; niche schools as well as specialised schools such as the Singapore Sports School, School of the Arts and NUS High School for Mathematics and Science.

Singaporeans will also have more opportunities and choices in a more diverse post-secondary education landscape. By 2020, 16,000 Singaporeans (3,000 more than today) will have publicly-funded entry places each year in our local universities. This represents 40% of Singaporeans in each cohort, up from 27% today. These degree places will span a wider range of disciplines, and many degree courses will be more interdisciplinary in nature. Our polytechnics and the Institute of Technical Education, which are internationally recognised to be of very high quality, will continue to reinvent themselves and their course offerings, to keep up with changing industry needs.

We will continue to invest heavily in the education of our children, with education subsidies of close to $200,000 for each Singaporean from primary to tertiary education. Those from less advantaged backgrounds also receive additional financial assistance and are eligible for merit-bursary schemes.

The Ministry of Education is also conducting a study to see how to increase access and quality in the pre-school education sector.

LIFE-LONG UPGRADING

3.15 Singaporeans need to treat upgrading as a life-long effort, in order to improve their job opportunities, wages and living standards throughout their working lives. In a rapidly changing business environment, Singaporeans need to constantly upgrade and refresh their knowledge and expertise to cope with changing job demands.

3.16 The Government has put in more resources to expand our CET infrastructure, raise the quality of teaching professionals and develop skill training programmes that are relevant to all workers.[8] Businesses have expressed strong support for efforts to train the local workforce in partnership with the Government.

3.17 There are also tailored training schemes for specific groups of workers. Older low-wage workers can use the Workfare Training Support (WTS) Scheme to improve their employability, upgrade to better jobs and earn more (see Box on *Strategies to Help Singaporean Low-Wage Workers*). Professionals, Managers and Executives can use the Skills Training for Excellence Programme (STEP) to update their skills, knowledge and expertise and stay competitive and employable.

[8] In 2010, we committed $2.5 billion to fund CET over 5 years. There are generous course fee subsidies for certifiable courses supported by the Singapore Workforce Development Agency. Employers can also claim absentee payroll when their workers go for training. Small and medium enterprises that send their employees for training can benefit from higher course fee subsidies and absentee payroll funding as announced at Budget 2012.

STRATEGIES TO HELP SINGAPOREAN LOW-WAGE WORKERS

To sustainably raise the wages of low-wage Singaporean workers over the long term, it is important to help them contribute more productively.

- The Inclusive Growth Programme helps companies improve work processes so that they can offer higher-value, higher-paying jobs. The Government has set aside $100 million for this programme, which is expected to benefit 100,000 low-wage workers.
- The WTS Scheme provides generous incentives to encourage low-wage workers to go for training to upgrade their skills, improve their employability and earn more. Since the WTS started in July 2010, more than 90,000 Singaporeans have benefited.

We also take measures at the sectoral level. In the cleaning sector, the National Environment Agency's recently-enhanced Clean Mark Accreditation Scheme requires accredited companies to pay their resident cleaners progressive wages that are commensurate with the higher productivity, standards and skills expected of accredited companies.

In addition, the Workfare Income Supplement (WIS) rewards low-wage workers by offering a cash component and additional CPF contributions to boost their income. Some 400,000 WIS recipients receive an average of $1,000 each per year. Some workers receive $2,800 per year in WIS, close to 25% of their annual income. The annual budget for WIS is approaching $0.5 billion. It provides substantial support for low-wage workers, but is carefully designed to preserve our work ethic, promote self-reliance, and encourage workers to upgrade and earn more. The Government is reviewing the Workfare schemes for Budget 2013.

HELPING MORE SINGAPOREANS JOIN THE WORKFORCE

3.18 Our citizen labour force participation rate (LFPR) has risen steadily.[9] However, there is still a pool of economically inactive Singaporeans, including older people and mothers who have temporarily stopped working to take care of young children, who may be keen to re-enter the workforce. Our aim is to enhance employment opportunities for all Singaporeans who wish to work, by reducing the barriers to resuming work.

3.19 We have job-matching and placement programmes to help Singaporean jobseekers, especially the long-term unemployed. Job seekers can receive training and employment assistance from the Workforce Development Agency's (WDA's) career centres at the Community Development Councils (CDCs) or the Employment and Employability Institute (e2i). Additionally, PME-job seekers can use CaliberLink, WDA's one-stop service centre dedicated to PMEs, which combines training concierge and career services.

3.20 The Government will continue to support companies to structure their jobs to match the changing work aspirations and work-life needs of Singaporeans. More options for part-time work or flexible work arrangements will encourage more people to return to work or remain in the workforce (see Box on *Helping our Older Workers Stay in the Workforce*).[10] We are studying ways to enhance the Work-Life Works! (WoW!) Fund, to incentivise employers to offer flexible work arrangements.

[9] The overall LFPR of citizens has risen over the last decade. 80.8% of the citizen population aged 25-64 were either working or actively seeking work in 2011, compared to 76.3% in 2001. Through efforts to support the employability of older Singaporeans, the LFPR of older Singaporeans aged 55-64 increased from 45.4% in 2001 to 63.4% in 2011.

[10] Survey on Barriers to Work, 2011.

HELPING OUR OLDER WORKERS STAY IN THE WORKFORCE

As life expectancies increase, the percentage of older Singaporeans in our workforce will increase. To tap on this growing pool of older workers, employers must redesign jobs and workplace processes to better match their abilities and skills. Companies should also continue to upgrade the skills of their older workers to ensure that they stay relevant and productive. Younger workers can also learn from, and tap on, the deep skills and knowledge of more experienced workers.

Changes to the Retirement and Re-employment Act in January 2012, and schemes such as the Special Employment Credit for older workers and ADVANTAGE! encourage and help companies to employ older workers by offsetting some of the costs involved in training and job redesign. These efforts have resulted in more older workers remaining in the workforce.

BRINGING SINGAPOREANS HOME

3.21 We should also tap on the pool of 200,000 Singaporeans overseas, including some 145,000 of working-age. These Singaporeans bring back fresh perspectives and add diversity to our society. Singaporeans are sought after in many countries, and many are keen to gain international exposure before returning home. To attract them back, Singapore must be an exciting global city, with good opportunities comparable to other leading global cities around the world.

COMPLEMENTING THE SINGAPOREAN CORE WITH A FOREIGN WORKFORCE

FOREIGN WORKFORCE SUPPORTING OUR ECONOMIC AND SOCIAL NEEDS

3.22 Singapore needs a mix of Singaporeans and foreigners in our workforce with a complementary set of skills, experiences and backgrounds. Foreign manpower can complement the Singaporean workforce in four key areas:

i. Supporting our social and development needs such as construction and social services, as well as conservancy and maintenance work, so that Singaporeans can continue to enjoy a good quality of life while moderating the cost of such services;
ii. Taking up lower-skilled jobs, as more Singaporeans upgrade into higher-skilled jobs;
iii. Helping to kick-start new high value-added emerging sectors to provide Singaporeans with a diverse range of good jobs; and
iv. Providing businesses the flexibility to capitalise on economic upswings, while buffering Singaporean workers from job losses in downturns.

3.23 ***Supporting our social and development needs.*** As our population grows older, we will need many more eldercare and healthcare workers, both local and foreign, to work within homes and in healthcare institutions and community facilities. More foreign workers will also be needed to build housing, transport and other key infrastructure, and to do conservancy and maintenance work.[11] They will help provide Singaporeans with good social and municipal services while moderating the cost.

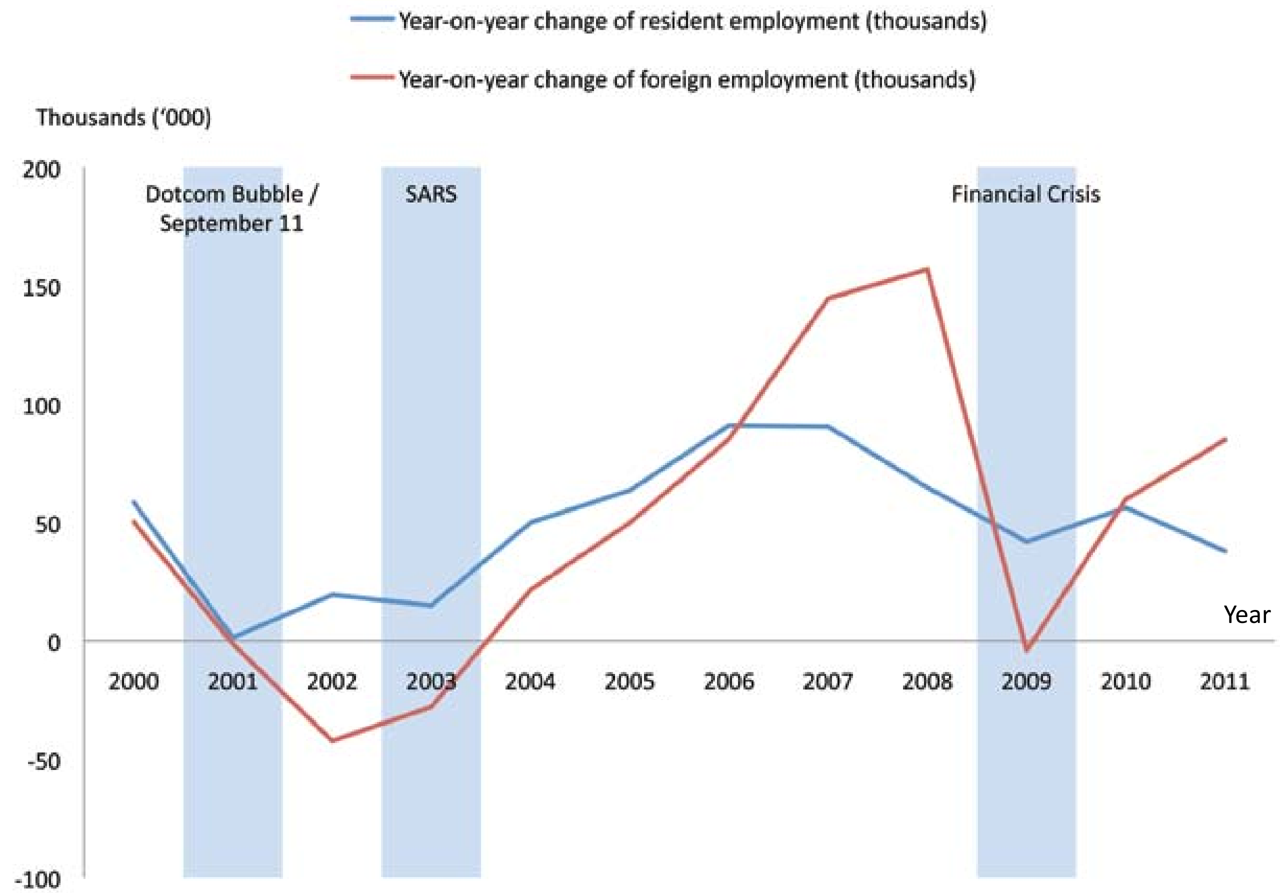
3.24 ***Taking up lower-skilled jobs as more Singaporeans upgrade into higher-skilled jobs.*** While we strive to upgrade low-skilled jobs through job enlargement and technology, there will always remain some routine, labour intensive jobs that cannot be automated or offshored easily.[12] An increasing proportion of such lower-skilled jobs will be taken up by foreigners. This is particularly so in domestically-oriented sectors, such as retail, food services, and hotels. Businesses have told us that it is increasingly difficult to find Singaporean workers for such jobs. Without foreign manpower, we will have to do without many such services. Costs will go up sharply, because Singaporeans will need to be paid much more to do these jobs. But even then we are unlikely to find enough locals to take up these jobs, because Singaporeans aspire to higher-skilled and more rewarding work.

3.25 ***Helping to kick-start new high value-added emerging sectors.*** One key challenge in setting up new industries in Singapore is that the skills and capabilities may not be immediately available locally. Having some foreign manpower with the necessary skills helps us kick-start new industries here, while we train Singaporean workers for these new jobs. Feedback from businesses is that they generally prefer to hire locals and encourage knowledge transfer to their local workforce, but we need to encourage companies to put this into practice more actively.

3.26 Maintaining a diverse workforce also helps foster new ideas and innovation. For example, the drive and innovation of immigrants have contributed to the dynamism of the US economy.[13] Foreigners will complement Singaporeans with their knowledge of key overseas markets, support regional and global operations based in Singapore, as well as help local companies internationalise.

3.27 ***Providing flexibility to businesses during upswings, while buffering Singaporean workers from job losses during downturns.*** Foreign manpower has provided the flexibility for businesses to capitalise on economic upswings and capture growth opportunities when they arise. Foreign workers also provide a buffer for Singaporean workers during recessions. During the economic downturn in 2001-2003 and to a lesser extent in the Global Financial Crisis of 2008-2009, foreign worker employment fell while resident employment grew (see **Chart 3.3**).

Chart 3.3 Change in Resident and Foreign Employment Levels[14]



Source: MTI

[11] We project that by 2030, 250,000 to 300,000 Work Permit holders will be needed in construction (250,000 in 2011), 28,000 foreigners in healthcare (13,000 in 2011), and 300,000 as foreign domestic workers (198,000 in 2011). More details can be found in NPTD's Occasional Paper, "*Projection of Foreign Manpower Demand for Healthcare Sector, Construction Workers and Foreign Domestic Workers*", 2012.

[12] Economists have noted job polarisation in many developed countries: the rapid growth of high-skilled (e.g. managerial and professional) jobs, slower growth in low-skilled (e.g. caring and cleaning) jobs, and the hollowing out of middle-skilled (e.g. clerical) jobs. Certain low-skilled jobs like personal services, retail, and nursing are hard to offshore. They will still be needed even as the economy upgrades. (See *"Job polarization in Europe"*, Goos, M., Manning, A., and Salomons, A., American Economic Review, 99(2), pp.58-63, 2009).

[13] *"How Much Does Immigration Boost Innovation?"*, Hunt, J. and Gauthier-Loiselle, M., NBER Working Paper Number 14312, 2008. In addition, according to the World Bank, non-residents accounted for 248,200 or 51% of new patents filed in 2010 in the US.

[14] The dip in foreign worker employment during economic downturns was broadly observed for all foreign employment pass types.

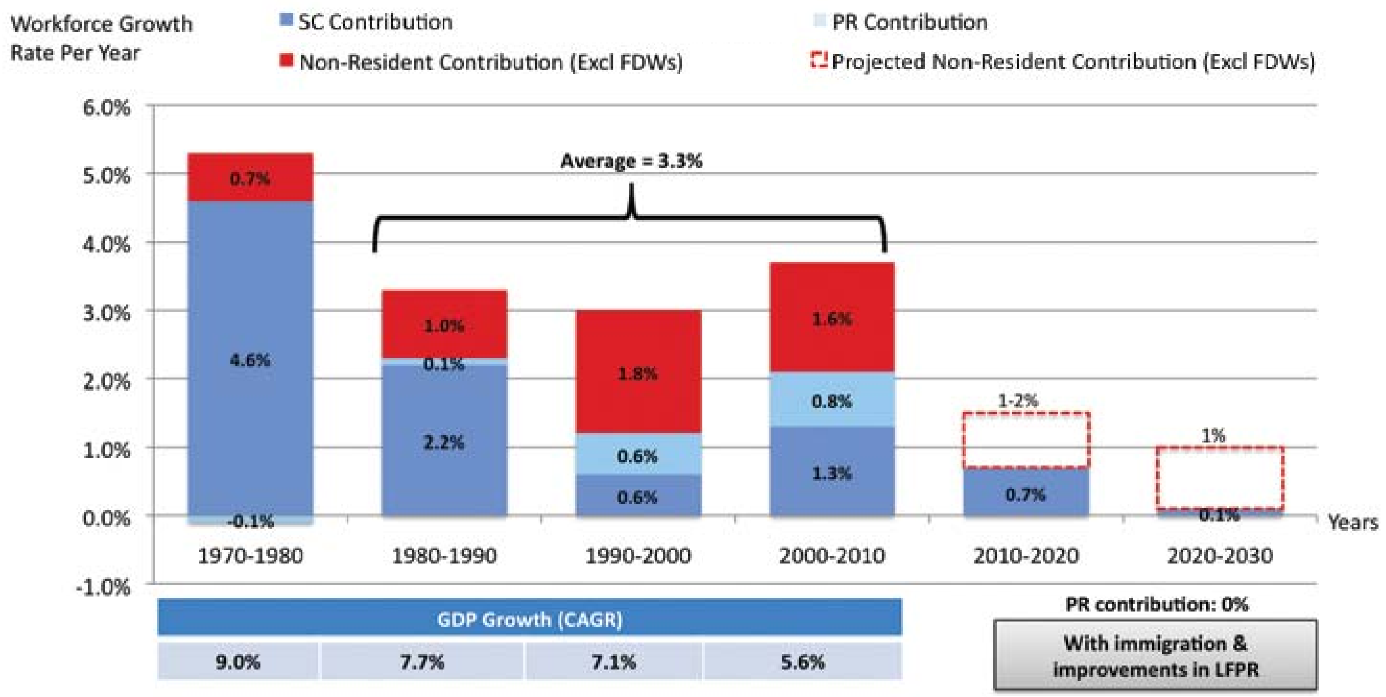
MODERATING THE OVERALL WORKFORCE GROWTH

3.28 However, we cannot allow in unlimited numbers of foreign workers. We do not want to be overwhelmed by more foreign workers than we can absorb, or to expand our total population beyond what our island is able to accommodate. Too many foreign workers will also depress wages and reduce the incentive for firms to upgrade workers and raise productivity.

3.29 The Government will continue reviewing foreign manpower policies to reduce reliance on foreign labour in the long run and to push companies towards adopting productivity improvements.

3.30 For the rest of the decade, as the growth of our Singaporean workforce slows, our total workforce growth will also slow to about 1% to 2% per year, half of the 3.3% per year over the past 30 years (see **Chart 3.4**).[15] Beyond 2020, workforce growth will slow down further to about 1% per year as the population ages and the Singaporean workforce starts to plateau.

Chart 3.4: Percentage Point Contribution to Workforce Growth Rates[16]



Source: NPTD's estimates using data from DOS and MOM

[15] These total workforce calculations exclude foreign domestic workers.

[16] There was a slight upturn in the citizen contribution to workforce growth between 2000 and 2010. This was due to an increase in labour force participation by older males, and females aged 30 and above, especially those with secondary and below education. Possible reasons include favourable labour market conditions during the boom years of 2004-2007, as well as Government programmes like WIS. The projected LFPR improvements are based on the estimated impact of the Re-employment Act on older workers' propensity to join the workforce as well as educational improvements in each cohort.

STRENGTHENING OUR SINGAPOREAN CORE IN THE WORKFORCE

3.31 Besides meeting our needs to fill lower-skilled jobs, having a foreign workforce that complements our Singaporean workforce has helped to attract high value-added activities into Singapore. This has created more good jobs for Singaporeans. Over the last decade, the number and proportion of Singaporeans holding PMET jobs have increased substantially.[17] By acquiring knowledge and advanced skills in high-value workplaces, and through continuing education and training, Singaporeans will be able to progressively upgrade and advance, and we will develop a stronger core of higher skilled Singaporeans in the workforce.

3.32 However, the major expansion in the foreign workforce over the last decade has caused some Singaporeans to worry about unfair competition from foreigners for jobs and development opportunities. While most employers are fair and responsible with hiring decisions and employee development, issues do arise from time to time. The Government is committed to maintaining an environment where Singaporeans can compete fairly for jobs based on merit. Individuals encountering employment discrimination at the workplace should raise the matter with the Tripartite Alliance for Fair Employment Practices (TAFEP) for advice and assistance. The Government will strengthen the TAFEP framework and raise awareness and compliance with TAFEP's fair employment guidelines.

A VIBRANT ECONOMY FOR A DYNAMIC SINGAPORE

3.33 In our next phase of development, Singaporeans will remain the core of the workforce. A competitive and vibrant Singapore economy will offer diverse opportunities and good jobs, so that Singaporeans can realise their aspirations.

3.34 We have to continue to tap growth opportunities in the region and internationally. Our companies must remain nimble and adaptable, and restructure to rely less on low-skilled labour, and create more higher value-added jobs. This will enable more Singaporeans to take on higher value-added and higher-paying jobs.

3.35 As our economy matures, we will have to sustain a pace of growth compatible with our changing demographics. Up to 2020, if we can achieve 2% to 3% productivity growth per year (which is an ambitious stretch target), and maintain overall workforce growth at 1% to 2%, then we can get 3% to 5% Gross Domestic Product (GDP) growth on average. But over the whole period, GDP growth is more likely to average 3% to 4%, though we may exceed that in good years.

3.36 Beyond 2020, Singapore will continue to enjoy good prospects so long as we remain competitive and are able to plug into Asia's growth. With workforce growth slowing to about 1% per year, and productivity growth moderating to 1% to 2% as our economy matures and undergoes major demographic shifts, we may see GDP growth of between 2% and 3% per year from 2020 to 2030. However, actual economic growth will depend on many factors: our external environment, our productivity and workforce growth, how dynamic and creative Singaporeans are, and how well we work together, compared to people in other cities.

[17] The proportion of Singaporean workers who are PMETs increased from about 2 in 5 in 2001, to 1 in 2 in 2011.

SUMMARY

Our vision is to build a globally competitive and vibrant economy, one which sustains inclusive growth, creates opportunities and good jobs for our people, and helps Singaporeans achieve their aspirations.

The size of our Singaporean workforce starts to plateau beyond 2020, while with better education and CET, a larger proportion will take up PMET occupations. Overall, two-thirds of Singaporeans will hold PMET jobs in 2030, compared to about half today. We need a dynamic economy and businesses that produce goods and services not just for Singapore, but for the region and the world. Our businesses will need a workforce with the full range of skills, backgrounds and experiences who can kick-start high value-added emerging sectors, and understand regional and international markets. This requires a complementary workforce of Singaporeans and foreigners (see Box on *Growing Professional Services in Singapore*).

As the Singaporean workforce will grow only very slowly, total workforce will also grow slowly. We will need to put more effort into restructuring and productivity improvements.

For the rest of this decade, workforce growth will slow to about 1% to 2% per year, half of the 3.3% per year over the past 30 years. Beyond 2020, workforce growth will slow down further to about 1% per year as the population ages and the Singaporean workforce starts to plateau.

Up to 2020, if we can achieve 2% to 3% productivity growth per year (which is an ambitious stretch target), and maintain overall workforce growth at 1% to 2%, then we can get 3% to 5% Gross Domestic Product (GDP) growth on average. But over the whole period, GDP growth is more likely to average 3% to 4%, though we may exceed that in good years.

Beyond 2020, Singapore will continue to enjoy good prospects so long as we remain competitive and are able to plug into Asia's growth. We may see GDP growth of between 2% and 3% per year from 2020 to 2030. However, actual economic growth will depend on many factors: our external environment, our productivity and workforce growth, how dynamic and creative Singaporeans are, and how well we work together, compared to people in other cities.

CHAPTER 4
POPULATION TRAJECTORIES

POPULATION TRAJECTORIES

4.1 Our population has grown quickly in the last half-decade, as Singapore took advantage of opportunities to grow when we could, in the face of sharp swings in the global economy during the global financial crisis. However, this has resulted in anxiety over the pace of change in society, as well as congestion and strains as our physical infrastructure did not keep up with the increase in population.

OVERVIEW OF SINGAPORE'S TOTAL POPULATION

4.2 Singapore's population is made up of the resident and non-resident population.

RESIDENT POPULATION

4.3 Our resident population is made up of both citizens and permanent residents (PRs).

NON-RESIDENT POPULATION

4.4 Non-residents are foreigners who are working, studying or living in Singapore on a non-permanent basis.

4.5 Our foreign workforce is part of our non-resident population. While they supplement our resident workforce and contribute to our economy, they do not add to our elderly population. This is because they return to their home countries after their term of employment ends. They also do not draw on Government subsidies meant for residents.[18]

4.6 Foreign workers also help to improve our overall old-age support ratio, and broaden our tax base.

TOTAL POPULATION TODAY

4.7 As at June 2012, we had 3.29 million citizens and 0.53 million PRs. Together, they made up the resident population of 3.82 million. We also had a non-resident population of 1.49 million. Overall, Singapore's total population was 5.31 million (See **Chart 4.1**).

4.8 Tourists and short-term visitors are not counted in Singapore's total population.

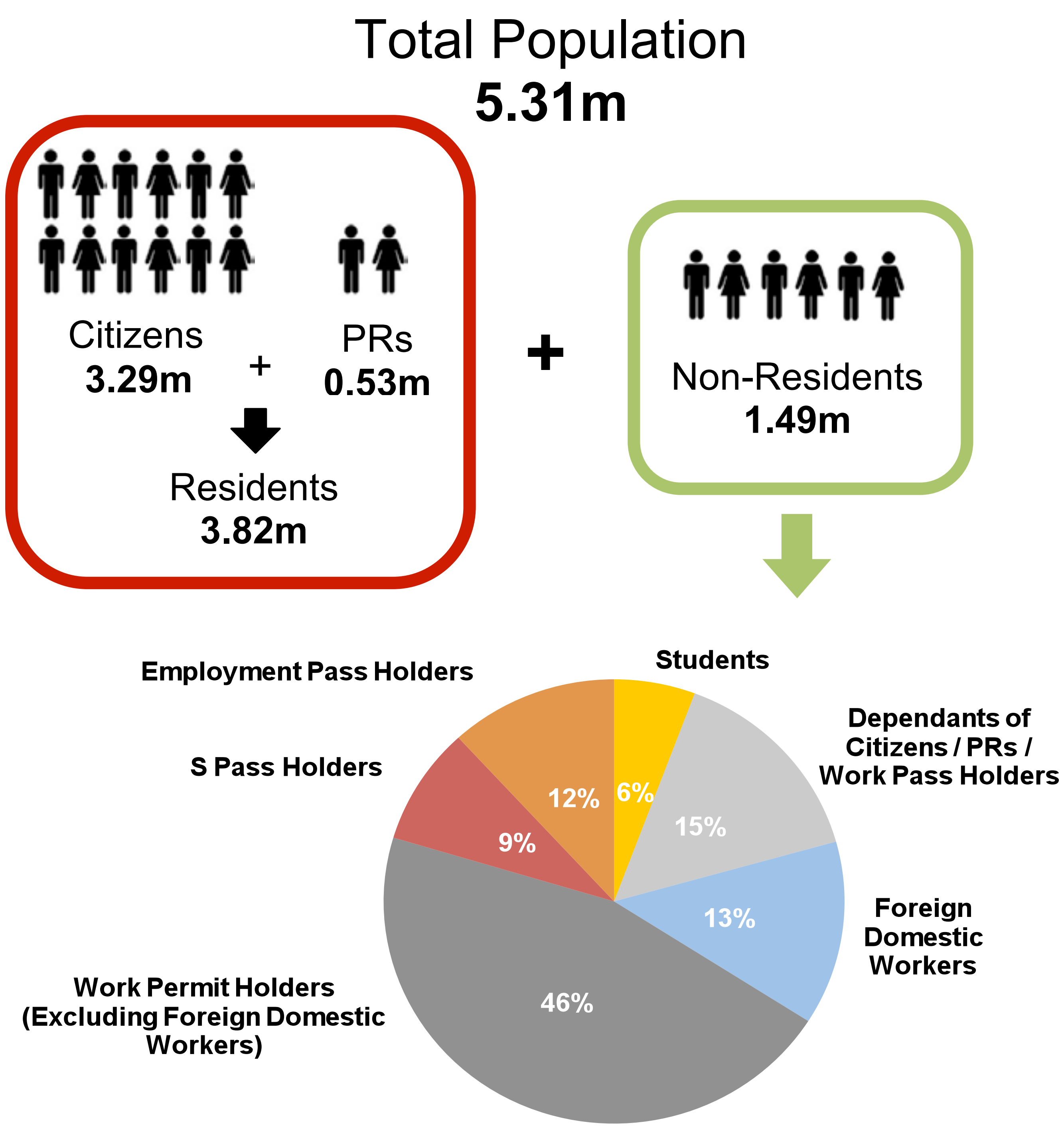
POSSIBLE POPULATION RANGES FOR 2020 AND BEYOND

4.9 The population roadmap proposed in this White Paper provides possible trajectories for our population, based on the needs of Singapore and Singaporeans.

4.10 For a strong Singaporean core, we will continue to support Singaporeans in their decisions to get married and have children, and remain open to immigration. This will stop our citizen population from shrinking and sustain the citizen population with a stable age distribution. The PR population will remain stable at between 0.5 and 0.6 million to ensure a pool of good quality candidates for Singapore citizenship.

[18] A list of citizen, PR and non-resident benefits can be found at www.population.sg.

Chart 4.1: Singapore's Total Population, June 2012



Source: DOS, MOM

BY 2020

4.11 Singapore's total population of residents and non-residents could be between 5.8 million and 6 million in 2020, depending on changes to our birth rates, life expectancy, and our social and economic needs.

4.12 The resident population (comprising citizens and PRs) is projected to be 4 to 4.1 million, of which citizens alone will make up 3.5 to 3.6 million of the population.

4.13 Total workforce growth will fall from the average of 3.3% per year in the last three decades, to between 1% and 2% per year from now to 2020. As we push to raise productivity and tighten controls on foreign manpower, the foreign workforce will still grow, but more slowly. As such, the growth in the non-resident population, which includes our foreign workforce, is expected to slow. By 2020, the size of our non-resident population is projected to be about 1.8 to 1.9 million.

BY 2030

4.14 Singapore's total population could reach between 6.5 and 6.9 million by 2030. There is a wider band of uncertainty. The actual population will again depend on factors such as our birth rate and life expectancy, the global and regional environment, our economic structure and social needs.

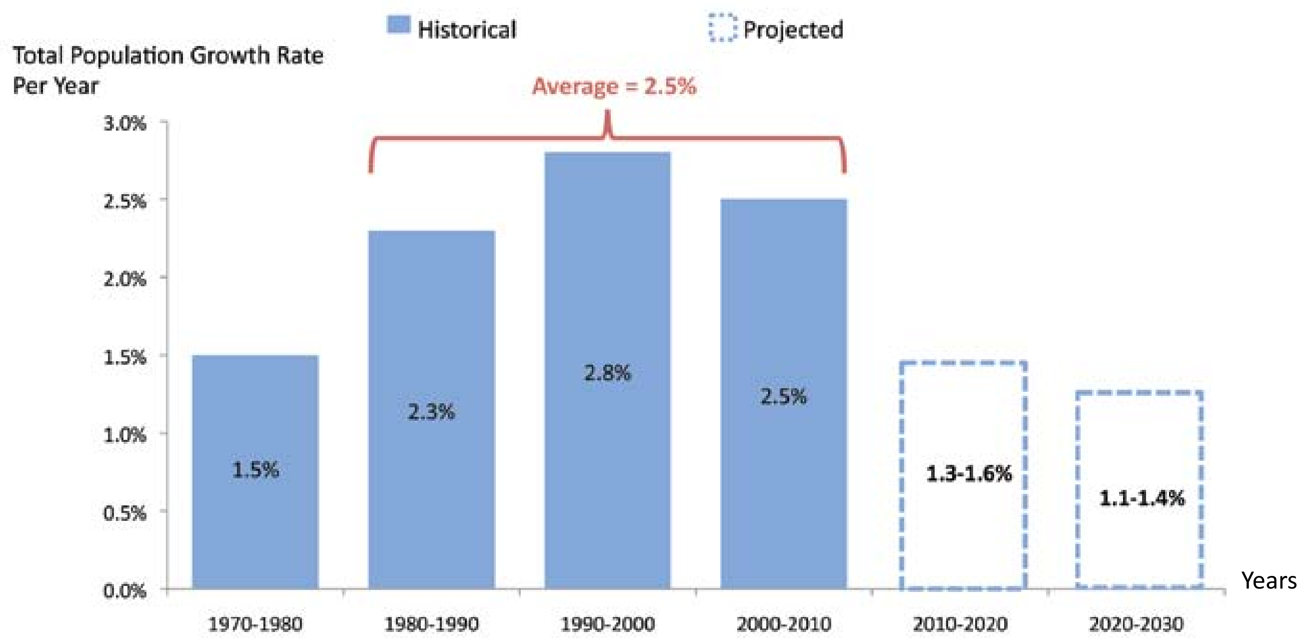
4.15 The resident population (comprising citizens and PRs) is projected to be 4.2 to 4.4 million, of which citizens alone will make up 3.6 to 3.8 million, as the growth in the citizen population slows.

4.16 Total workforce growth is expected to slow further to about 1% as the size of the Singaporean workforce plateaus, with more Singaporeans retiring and fewer entering the workforce. Two-thirds of Singaporeans are expected to be working in PMET jobs. We will need foreign workers to supplement the Singaporean core in the workforce so that we have a workforce structure with the full range of skills, backgrounds and experiences to support our needs. As such, the non-resident population is projected to be around 2.3 to 2.5 million by 2030.

POPULATION GROWTH RATES WILL SLOW

4.17 As the rate of growth in our citizen population slows, and as we slow down foreign workforce growth rates, total population growth rate will slow compared to the previous three decades (See **Chart 4.2**).

Chart 4.2: Rate of Total Population Growth Per Year



Source: DOS; NPTD's estimates

SUMMARY

The roadmap in this White Paper puts us on possible population trajectories to meet the present and future needs of Singapore and Singaporeans.

We estimate Singapore's total population of residents and non-residents in 2020 to be between 5.8 and 6 million, depending on our birth rate, life expectancy, and our social and economic needs. The resident population (comprising citizens and PRs) is projected to be 4 to 4.1 million, of which citizens alone will make up 3.5 to 3.6 million.

By 2030, Singapore's total population could range between 6.5 and 6.9 million. There is a wider band of uncertainty, and the actual population will again depend on factors such as our birth rate and life expectancy, the global and regional environment, our economic structure and social needs. The resident population (comprising citizens and PRs) is projected to be 4.2 to 4.4 million, of which citizens alone will make up 3.6 to 3.8 million.

CHAPTER 5
A HIGH QUALITY LIVING ENVIRONMENT

A HIGH QUALITY LIVING ENVIRONMENT

5.1 Singapore must continue to be one of the best places to live in the world – a city for all ages, and a country we are proud to call home.

5.2 We will invest in our infrastructure and create high quality urban spaces, offering convenient access to amenities, transport nodes and services. With new parks and park connectors, Singaporeans will continue to enjoy accessible and interconnected green spaces all around Singapore.

5.3 In the second half of the last decade, both our economy and population grew more rapidly than anticipated, outpacing infrastructure development. Sharp economic fluctuations made it difficult to project long-term trends accurately, and we under-estimated demand for public transport and public housing, which have long lead times. The result was congestion on our public transport system and a tight housing market.

5.4 As part of our population planning, we must therefore look well ahead and implement infrastructure plans in a timely manner. We also need to provide sufficient buffer given that long-term projections are inevitably uncertain, and despite the most careful planning, things may turn out differently.

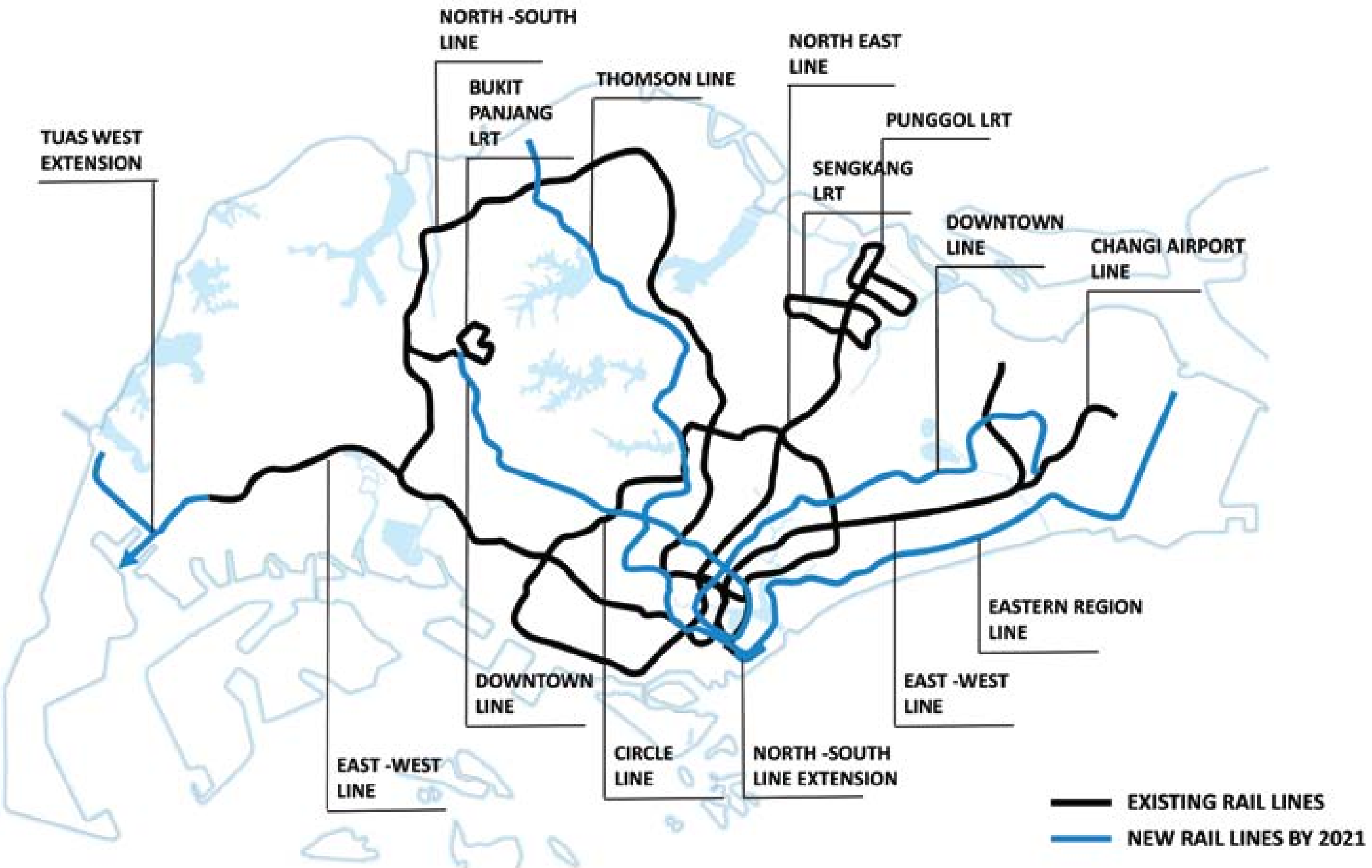
ADDRESSING THE STRAINS FELT TODAY

5.5 We have ramped up the development of infrastructure and facilities to meet the needs of a larger population. We have seen some initial results, and there will be further improvements in the next few years as more infrastructure and facilities are progressively completed.

IMPROVING RAIL CONNECTIVITY AND CAPACITY

5.6 Following the full opening of the Circle Line in 2011, the Downtown Line will be opened in stages from 2013 to 2017, bringing greater connectivity for commuters in the north-western and eastern regions. The Thomson Line, which serves the population in the north, will also be opened in stages from 2019 to 2021. With the addition of the Thomson Line, Eastern Region Line, Tuas West Extension, North-South Line Extension and Downtown Line (see **Diagram 5.1**), our existing rail network will increase by about 100 km to 280 km by 2021, and our rail density will increase from 34 km/million population today to 47 km/million population. This is comparable to cities like New York today.[19]

Diagram 5.1: Existing and Upcoming Rail Developments by 2021



[19] New York City's rail density is about 46 km/million population today.

5.7 We are upgrading the signalling systems of the North-South and East-West Lines to increase capacity on these lines by up to 20% during the peak period. When completed in stages from 2016, there will be 6 instead of 5 trains running every 10 minutes during peak periods, reducing the passenger load and shortening waiting times.

5.8 To further increase train frequency and improve comfort levels for commuters, we will add new trains to the fleet from 2014 to 2016. There will be 25% more trains for the North-South and East-West Lines, 70% more trains for the North East Line, 60% more trains for the Circle Line, 70% more trains for the Bukit Panjang Light Rail Transit (LRT) and 40% more trains for Sengkang-Punggol LRT.

EXPANDING BUS SERVICES

5.9 The Bus Service Enhancement Programme will improve bus capacity, service levels and connectivity.

5.10 We will add 800 new buses to the public bus fleet over 5 years, increasing capacity by 20%. This will reduce peak loads, shorten waiting times and provide more comfortable rides. A total of 40 new bus services will also be introduced progressively, including several bus routes that will duplicate crowded stretches of the rail network to provide an additional travel option for commuters. To improve bus service reliability, we will implement more bus priority measures such as the Mandatory Give-Way to Buses Scheme and more bus lanes.

5.11 Over the next 10 years, we will build more integrated transport hubs as we redevelop areas like Bukit Panjang, Hougang and Yishun. The integrated transport hubs will enhance commuter experience and make transfers between rail and bus services more seamless and convenient.

TRAVEL DEMAND MANAGEMENT MEASURES

5.12 Improving the capacity of our transport system takes time. In the short term, we are implementing travel demand management measures to smoothen the distribution of travel demand around the peak hours. These measures include off-peak travel incentives on rail, promoting flexible work hours and collaboration with companies to implement travel management measures. This approach will remain useful in the longer term to optimise our public transport capacity.

AN INCLUSIVE TRANSPORT SYSTEM

5.13 We are implementing comprehensive measures to enhance the accessibility of our transport system. All our public buses will be wheelchair-accessible by 2020, up from about half today. We will also install lifts at more pedestrian overhead bridges near public transport nodes such as MRT stations, to increase accessibility for the elderly and the wheelchair-bound.

5.14 Over the next few years, we will improve the commuter experience and "last mile" connectivity, with more sheltered walkways, and underground pedestrian networks with links to nearby buildings, especially in the city. More cycling paths and bicycle parking facilities at transport nodes will also be progressively built island-wide as part of the National Cycling Plan.

5.15 We will build noise barriers where needed to reduce noise pollution. The transport sector will do its part to reduce air pollutants and greenhouse gas emissions, and the Carbon Emissions-based Vehicle Scheme has been implemented in January 2013 to encourage people to switch to low-emission vehicles.

LARGE PIPELINE OF PUBLIC HOUSING

5.16 We have ramped up the Build-to-Order (BTO) supply of public housing significantly from 8,800 units in 2009 to 16,000 units in 2010, 25,000 units in 2011 and 27,000 units in 2012. The total number of units launched in 2011 and 2012 is larger than the number in Ang Mo Kio town. HDB will launch at least 20,000 BTO units in 2013. The increased supply of public housing has resulted in applicants having a higher chance of being called to select a flat.

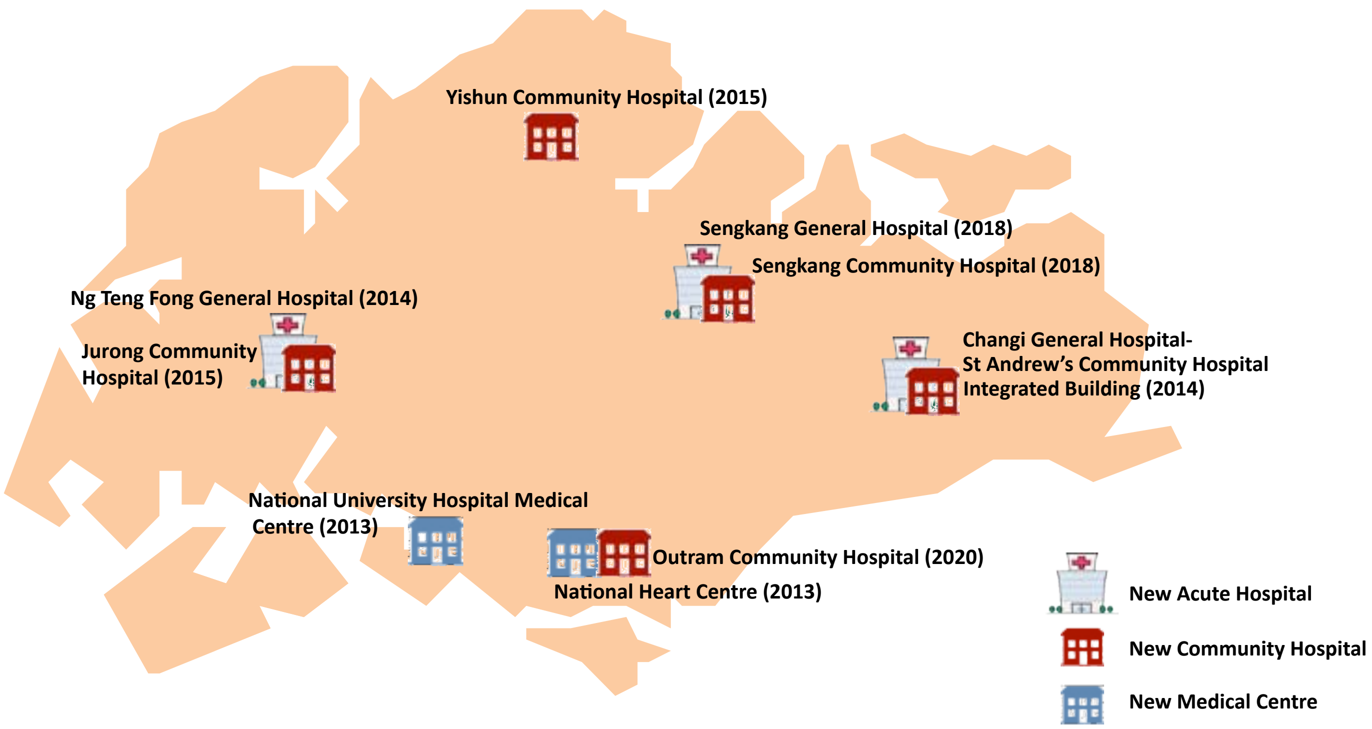
5.17 Apart from building up our newer towns, we will also provide more housing in mature estates to rejuvenate them. If there is demand, more housing will be built, in towns such as Bukit Batok, Bukit Merah, Choa Chu Kang, Clementi, Hougang, Queenstown, Sembawang, Tampines, Woodlands and Yishun.

5.18 From now till 2016, in addition to 110,000 public housing units, 90,000 private housing units will be completed. This significant expansion in our housing supply should help meet the demand for housing.

MORE HEALTH AND COMMUNITY FACILITIES

5.19 The new Ng Teng Fong General Hospital, as well as the Integrated Building for Changi General Hospital and St Andrew's Community Hospital, will open in 2014, while the completion of the Sengkang General Hospital has been brought forward from 2020 to 2018. Two new community hospitals in Jurong and Yishun, to be co-located with the new Ng Teng Fong General Hospital and Khoo Teck Puat Hospital respectively, will open in 2015. A community hospital, to be co-located with Sengkang General Hospital, is slated for completion in 2018, and the Outram Community Hospital will open by 2020. By 2020, we will have added 4,100 hospital beds across Singapore. The number of acute hospital beds will increase by 2,200, a 30% increase from today. Community hospital beds will increase by 1,900 beds, more than tripling the 800 community hospital beds today. Singaporeans will have better and more convenient access to healthcare.

Diagram 5.2: New Infrastructure to Meet Healthcare Needs



5.20 Our long-term aim is to make every neighbourhood a senior-friendly one. We will build 17 new and replacement nursing homes, 39 senior care centres,[20] and 56 seniors' activity centres from now to 2016. These aged care and support facilities and services will be built within the community so that seniors can age gracefully among family and friends. More facilities may be added in tandem with demand, in the future.

5.21 The additional facilities and improvement works will enable Singapore to support a larger, older population of 5.8 to 6 million in 2020 while alleviating the strains that we are currently facing.

[20] Senior care centres provide day care, dementia day care, day rehabilitation services and basic nursing services.

LOOKING AHEAD TO 2030

5.22 Long-term planning is necessary for us to optimise our limited land and sea space, and create a high quality living environment in Singapore. Major infrastructure development requires long lead times and far-sighted planning and investment. To avoid falling behind in our infrastructure again, we will plan well in advance, strengthen coordination within Government, and implement these plans in a timely and effective manner. We will also build in a buffer where possible, so that we maintain the flexibility to respond to unexpected developments and future needs.

5.23 With sound long-term planning and investment in infrastructure, we can support a good quality of life for a population of 6.5 to 6.9 million in 2030, with room for further growth in the longer term. To achieve this, we will embark on the following development strategies to support sustainable growth for the longer term.

AFFORDABLE, GOOD QUALITY HOUSING

5.24 We will ensure that Singaporeans continue to have good and affordable housing. Our housing estates will be planned comprehensively to meet the diverse needs of our population, with convenient access to transport, amenities and recreational spaces in a good living environment. Sufficient land for homes has been set aside for an additional 700,000 homes from today, and more in the longer term if there is a need.

5.25 With the opening up of new towns and estates in Bidadari, Tampines North and Tengah, we have the opportunity to creatively develop unique and vibrant housing communities, as we are now doing with estates such as Punggol. Under the Punggol 21 plans, Punggol has been transformed into a Waterfront Town with a coastal promenade, waterfront park as well as waterfront housing and leisure attractions. Punggol is also Singapore's first eco-town, with plans for more environmentally friendly buildings, cycling paths and spaces for car sharing and the test-bedding of new green technologies.

5.26 We will also build more housing units in mature estates where there are pockets of housing land available, especially around transport facilities. This will give Singaporeans the choice of living in familiar surroundings, close to their parents, and enable more people to benefit from amenities in established towns. There will also be more housing in the central region, allowing more people to live in or near the city, closer to their workplaces. This will enhance convenience and reduce the need for travel.

5.27 Besides providing housing in a variety of locations, we will also ensure a range of housing options to suit the needs of families, young couples, elderly and singles. All existing HDB estates have been enhanced with basic barrier-free accessibility. This will also be the case with all new HDB estates, amenities and facilities.

GREATER MOBILITY FOR ALL

5.28 A quality transport network is central to a thriving, liveable city, connecting people to jobs, schools, commercial and leisure centres, and other facilities across Singapore.

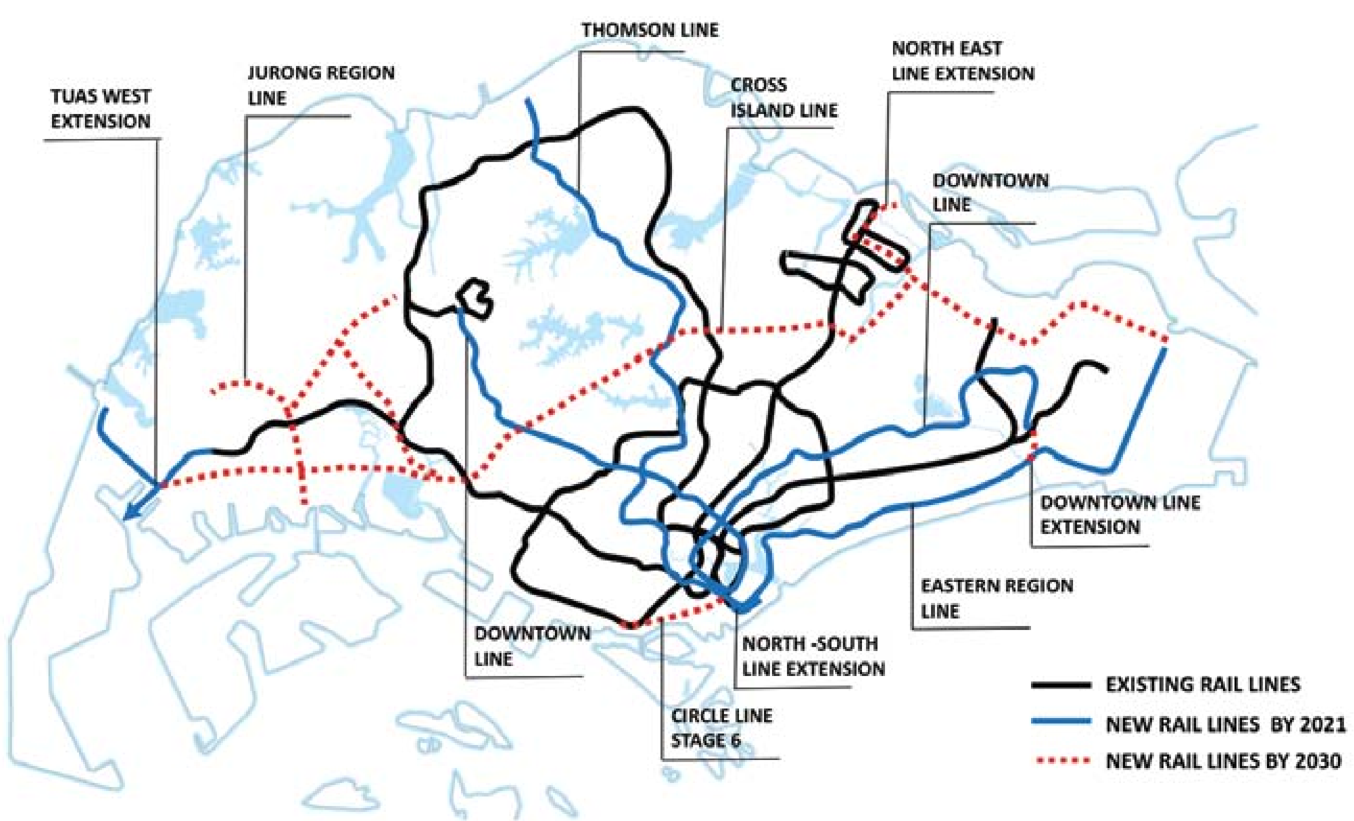
5.29 Beyond the lines announced in the 2008 Land Transport Master Plan (LTMP), we will need to continue to expand our rail network in tandem with new developments, and as we strive for an even higher public transport mode share of 75% by 2030 (see **Diagram 5.3**).

5.30 We will invest in two new rail lines. The Cross Island Line will provide a strategic link to connect residents in the east and northeast directly to the towns in the central region, and the employment centres in the west. It will also interconnect with most of the other radial lines, helping to shorten travel times and improve overall network connectivity and resilience. The Jurong Region Line will enhance regional travel in the west, as well as provide local connectivity to major activity nodes such as Jurong Lake District, Tengah new town and the Jurong Industrial Estate.

5.31 We will also implement three extensions to existing lines.

5.32 The Circle Line Stage 6, which will "close the circle" by connecting HarbourFront and Marina Bay Stations, will enhance the connectivity between the central east areas (e.g. Paya Lebar) and central west areas (e.g. Kent Ridge) and also serve the Greater Southern Waterfront in the longer-term.

Diagram 5.3: New Rail Lines by 2030



5.33 To support the growth in population and employment in Punggol, and the further expansion of Punggol Town Centre northeast towards Coney Channel, the Northeast Line will be extended to serve Punggol Downtown as well as residents living in the northern part of Punggol, and enhance connectivity to other parts of Singapore.

5.34 The Downtown Line extension will connect the Downtown Line to the Eastern Region Line and will enhance the connectivity between the areas served by the two lines.

5.35 With these additional lines, the rail network will increase to about 360 km with a density of about 54 km/million population around 2030, higher than that in New York City today (see **Table 5.4**). 8 in 10 homes will be within a 10-minute walk from a rail station in 2030, up from 6 in 10 today.

Table 5.4: Increasing Rail Length and Accessibility

YEAR	RAIL LENGTH (RAIL DENSITY)	% HOUSEHOLDS WITHIN A 10-MIN WALK OF A RAIL STATION
2012	**178 km (34 km/mil pop)**	**57%**
By 2021	**~280 km (47 km/mil pop)**	**~70%**
By 2030	**~360 km (54 km/mil pop)**	**~80%**

WORK AND PLAY, NEAR HOME

5.36 More jobs will be conveniently located near to residential areas, reducing the need to commute. By 2030, we can expect the growth areas of Jurong Lake District, Paya Lebar Central and One-North to mature. Besides these growth areas, we will create more space for businesses nearer to residential areas, such as at Woodlands, Serangoon and Punggol. Land has also been catered for modern industrial parks near residential areas, such as at Lorong Halus and Sengkang. Together with the provision of more commercial and leisure amenities, community and sports facilities as well as green spaces, these developments will provide a diversity of job opportunities to Singaporeans near their homes.

MAKING SPACE FOR A HIGH-VALUE ECONOMY

5.37 We will provide sufficient land to support the growth of our manufacturing sector to create high-value jobs and business opportunities. If there is demand, we also have the capacity to double the prime office space in the central area to more than 11 million square metres, strengthening Singapore's status as a premier financial and business services hub.

Jurong Lake District (Artist's Impression)

CELEBRATING OUR ENVIRONMENT AND HERITAGE

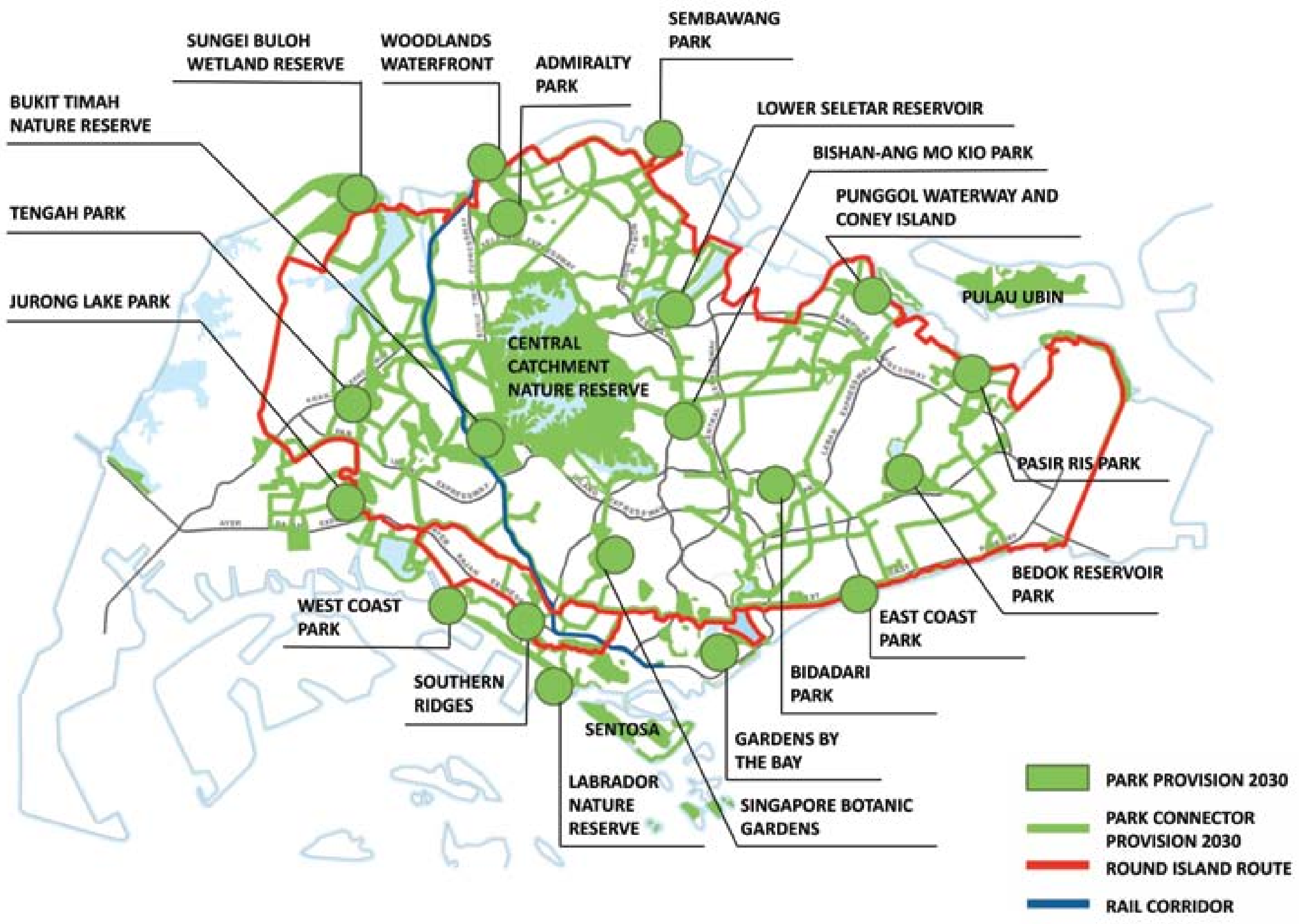
5.38 Despite our land constraints, we will take a balanced development approach to ensure that even as we meet our needs for housing, employment, and other key land uses, we will also celebrate and safeguard our environment and heritage wherever it is practical to do so.

5.39 Since the 1980s, we have conserved whole historical districts and more than 7,000 buildings and structures island-wide, and will continue to do so when the opportunity arises.

5.40 Singapore will be a 'City in a Garden' with attractive parks and green spaces, and a vertical tapestry of rooftop gardens and skyrise greenery. We will provide more land for parks and green spaces, in tandem with population growth and will continue to work towards improving park accessibility. At least 85% of our households will live within 400 m of a park by 2030.

5.41 Many Singaporeans already enjoy the park connector network that traverses the island, linking parks, coastal areas, and natural heritage sites with residential neighbourhoods. The Round Island Route, a 150 km long continuous recreational corridor around Singapore, will run through numerous residential estates, connecting Singaporeans to parks and places of interest across the island. We will continue to grow our park connector network to 360 km by 2020 (see **Diagram 5.5**).

Diagram 5.5: Interconnected Parks and Green Spaces



5.42 Besides regional parks such as the Pasir Ris Park and the Bishan-Ang Mo Kio Park, there will also be more town and neighbourhood parks. By making the most of our geography, we will enjoy parks in a variety of settings, from coastal and riverine parks to hillside, nature and heritage parks. In urban areas, more buildings will have features such as environmentally friendly and attractive green roofs as well as communal sky terraces where people can interact.

5.43 Singapore will have a diverse and vibrant arts, culture and sports scene, with a good variety of cultural and sports offerings. We are upgrading and building more public libraries. The National Art Gallery will be completed in 2015, adding to the vibrancy of our Civic District. Our sports hub will open in 2014, providing a wider range of sporting events and facilities for Singaporeans. We are also investing in regional sports venues as well as in cultural and sports programming, to provide greater opportunity for all Singaporeans to pursue their interests in the arts and sports at the community level.

5.44 We are committed to fulfilling the 2030 goals set out by the Sustainable Singapore Blueprint: to be a city which is liveable, lively and well-loved through improving our resource efficiency, enhancing our urban environment, building our capabilities and fostering community action. We will continue the various initiatives under the Active, Beautiful and Clean Waters (ABC Waters) Programme which integrates drains, canals and reservoirs with the surrounding environment to create beautiful and clean streams, rivers and lakes. Singapore's City Biodiversity Index has also been adopted by the United Nations (UN) as a reference assessment tool on biodiversity for cities.

BEYOND 2030

5.45 Since 1965, our land area has grown by 23% to accommodate the diverse range of land needs of our population and economy. We have conserved and optimised land use, as well as built up land capacity by reclaiming where we can and re-using existing land.

5.46 We have been proactive with using land in an innovative manner, with pioneer projects such as the construction of the Jurong Rock Caverns, Southeast Asia's first underground liquid hydrocarbon storage facility. We will continue to explore new technology and creative ideas to help us expand and optimise our spaces, and keep Singapore highly liveable.

5.47 The National Research Foundation has set aside $135 million for the National Innovation Challenge on "Land and Liveability" to fund research and development focusing on creating new space and optimising use of space to support an economically vibrant, highly liveable and resilient city of the future.

5.48 With creative planning and innovative design, we can make the best use of our limited land and ensure that Singapore remains a vibrant global city and an endearing home with a high quality living environment.

SUMMARY

We will plan and invest in infrastructure ahead of demand, to create high quality urban spaces and ensure that our infrastructure can support a range of population trajectories, with a total population of about 5.8 to 6.0 million in 2020, and 6.5 to 6.9 million in 2030.

Additional facilities and improvement works are in progress to alleviate the strains that we are currently facing:

- We will add 800 new buses to the public bus fleet over 5 years, increasing capacity by 20%. Our rail network will be extended by about 100 km to 280 km by 2021. 8 in 10 homes will be within a 10-minute walk from a rail station in 2030.

- From now till 2016, 90,000 private housing units and 110,000 public housing units will be completed. This significant expansion in our housing supply should help meet the demand for housing.

- More land will be set aside for parks and green spaces, in tandem with population growth. We will grow our park connector network to 360 km by 2020. At least 85% of our households will live within 400 m of parks by 2030.

We will explore new technology and innovative solutions, to expand and optimise our land use, create new land capacity, and make use of space more efficiently and effectively to enhance liveability and support longer-term needs.

CHAPTER 6
CONCLUSION

CONCLUSION

6.1 Our citizen population reached a turning point in 2012, as our first cohort of Baby Boomers turned 65. At current birth rates, our citizen population will age rapidly and will decline from 2025, if we do not take in any immigrants. Our demographic challenge is complex and multi-faceted, and has far reaching effects on current and future generations of Singaporeans. There are no simple solutions.

6.2 We need to find a balance. If we do too little to address the demographic challenge, we risk becoming a steadily greying society, losing vitality and verve, with our young people leaving for opportunities elsewhere. But if we take in too many immigrants and foreign workers, we will weaken our national identity and sense of belonging, and feel crowded out of our own home. This White Paper aims for a judicious balance to achieve our goal of: A Sustainable Population for a Dynamic Singapore.

6.3 Decisions that we take now to address these challenges will have outcomes that we bear as a nation, and leave for our children. We must therefore plan ahead and make decisions that strike the best balance for Singapore, to build the best home for Singaporeans, both current and future.

6.4 We should pass on to our future generations a country with strong finances; a dynamic economy to generate good jobs for Singaporeans; a sustainable, cohesive and well-integrated population; a city which has room to grow, and continues to be one of the best cities to live in; the best home for Singaporeans of all ages.

6.5 A home for Singaporeans to bring up families and nurture children, where the young have exciting opportunities, where we care for those less fortunate than ourselves, and can live our silver years with grace and dignity.

OUR SINGAPORE

6.6 Our immigrant heritage has shaped the Singapore of today, including the values that we hold dear – respect for others, family ties, hard work, meritocracy, multi-racialism as well as a robust sense of social justice, harmony and cohesion. These values have enabled Singapore to develop into a First World Country in a few short decades.

6.7 The Singapore identity will continue to evolve as we mature as a society. Our Singapore Conversation touches, among other things, on the issue of what defines the Singaporean identity and the core values that should anchor our society. Our identity is not just based on where we or our forefathers came from, but also by the common experiences we share, the bonds we have forged with one another, and the shared future that we are building together in this place we choose to call home. As we build a consensus on what kind of society we want to be, we should continue to re-affirm those values that form the bedrock of our society's wellbeing and success.

SUMMARY OF KEY PROPOSALS

6.8 Our sustainable population objectives are threefold. First, Singaporeans form the core of our society and the ***heart*** of our nation. To be a strong and cohesive society, we must have a strong Singaporean core. Second, our population and workforce structure must support a dynamic economy that can steadily create good jobs and opportunities to meet Singaporeans' ***hopes*** and aspirations. Third, Singapore must continue to be a good ***home*** with a high quality living environment. This White Paper recommends a population roadmap to address our demographic challenge. A summary of the key proposals is outlined below:

a) For a strong and cohesive society with a sustainable Singaporean core:

i. **Encourage Marriage and Parenthood** – To create a family-friendly environment supported by the Government's Marriage & Parenthood Package which is being enhanced to (a) enable couples to get housing faster and more easily; (b) provide support for conception and delivery costs; (c) further defray child-raising costs, including healthcare costs; (d) enhance work-life measures to help working couples balance work and family commitments; (e) signal to fathers to play a bigger role through paternity and shared parental leave.

ii. **Remain Open to Immigration** – To stop our citizen population from shrinking and sustain the citizen population with a stable age distribution, we will take in between 15,000 and 25,000 new citizens each year. The citizen population could be between 3.5 and 3.6 million in 2020, and between 3.6 and 3.8 million in 2030. We will grant about 30,000 PRs each year, in order to maintain the PR population at between 0.5 and 0.6 million for a stream of good quality candidates for citizenship;

iii. **Enhance Integration Efforts** – To help new immigrants adapt to our local way of life and to reinforce our values and sense of belonging.

b) For a dynamic economy to create good jobs and opportunities for Singaporeans:

i. **Create Good Jobs for Singaporean Core in Workforce** – To support a more qualified and skilled Singaporean workforce in a dynamic economy where two out of three Singaporeans are in Professional, Managerial, Executive and Technical (PMET) jobs in 2030 compared to about one in two today;

ii. **Complement Singaporean Core with Foreign Workforce** – To have an overall workforce structure that serves our economic, social and infrastructure needs;

iii. **Moderate Overall Workforce Growth Rates** to 1% to 2% per year up to 2020, and about 1% per year up to 2030 – To drive the necessary restructuring and productivity improvements, and to ensure that growth is sustainable and does not outpace our infrastructure development.

c) For a high quality living environment:

i. **Plan and Invest in Infrastructure Ahead of Demand** – To create high quality urban spaces and ensure that our infrastructure can support a range of population trajectories with a total population of about 5.8 to 6.0 million in 2020, and 6.5 to 6.9 million in 2030;

ii. **Implement Infrastructure Programmes** – To expand our transport network, build more public housing, health and community facilities, and create new parks and interconnected green spaces all around Singapore;

iii. **Explore New Technology and Innovative Solutions** – To expand and optimise our land use, create new land capacity, and make use of space more efficiently and effectively to enhance liveability and support longer-term needs.

ANNEX A

FEEDBACK CHANNELS & REVIEW PROCESS

FEEDBACK CHANNELS AND REVIEW PROCESS

1. The Government has engaged the public extensively on population issues since March 2012.

2. We engaged many Singaporeans from different walks of life and age groups – including trade unionists, workers, retirees, students, businessmen, professionals, women's groups, overseas Singaporeans, civil servants, bloggers, grassroots leaders, and academics. This was done through a total of 47 consultation and dialogue sessions, comprising:

   a. Closed-door **focus group and roundtable discussions** with Ministry officials
   b. **Discussion forums** on Marriage and Parenthood with Minister Grace Fu and then Minister of State Halimah Yacob on 20 July, 23 August and 29 August 2012.
   c. **Dialogue sessions** with then Minister of State Halimah Yacob and Senior Parliamentary Secretary Sam Tan on 20 September 2012, as well as Minister S Iswaran and Acting Minister Tan Chuan-Jin on 26 September 2012.
   d. A **townhall dialogue** with Deputy Prime Minister Teo Chee Hean, Minister Grace Fu and Acting Minister Tan Chuan-Jin on 9 October 2012.

3. On 26 July 2012, the National Population and Talent Division (NPTD) released an Issues Paper, "Our Population, Our Future" and invited all Singaporeans, civil society and sectoral groups, and Members of Parliament to offer ideas and suggestions on a sustainable population that will ensure that Singapore continues to be a vibrant global city, and the best home for Singaporeans.

4. We set up a dedicated website on population issues (www.population.sg) for the public to share their views, and to provide regular updates on our public engagement process and information papers[21] released by Government agencies.

5. By 31 October 2012, we received close to 2,500 pieces of feedback directly and had engaged over 2,200 individuals and representatives from various groups and organisations.

6. We studied the feedback carefully and examined the relevant policy areas. The feedback received has helped to shape the population vision and policies in this White Paper. This review was an inter-agency effort involving the National Population and Talent Division, Building and Construction Authority, Economic Development Board, Immigration & Checkpoints Authority, Land Transport Authority, Ministry Of Culture, Community and Youth, Ministry Of Defence, Ministry Of Education, Ministry of Finance, Ministry Of Health, Ministry Of Home Affairs, Ministry Of Manpower, Ministry Of National Development, Ministry Of Social and Family Development, Ministry Of Trade and Industry, Ministry Of Transport, Public Service Division, Urban Redevelopment Authority and other relevant agencies.

7. A summary of the feedback received can be downloaded at our website (www.population.sg).

[21] NPTD's Occasional Paper on Citizen Population Scenarios (April 2012), NPTD's Occasional Paper on Marriage and Parenthood (June 2012), NPTD's Issues Paper on 'Our Population, Our Future' (July 2012), MTI's Occasional Paper on Population and Economy (September 2012), Department of Statistics' Population Trends (September 2012), NPTD's Population in Brief (September 2012) and NPTD's Occasional Paper on Projection of Foreign Manpower Demand for Healthcare Sector, Construction Workers and Foreign Domestic Workers (November 2012).

ANNEX B
SINGAPORE'S MARRIAGE & PARENTHOOD PACKAGE

SINGAPORE'S MARRIAGE & PARENTHOOD PACKAGE

1. Introduced in 2001, Singapore's Marriage & Parenthood Package supports Singaporeans in their aspirations to marry and have children. The package aims to address the key challenges that Singaporeans face in getting married and starting families through:

   a. Providing singles with opportunities for social interaction;
   b. Making it easier and faster to get housing to support earlier marriages and births;
   c. Defraying child-raising costs, including healthcare costs;
   d. Helping working couples balance work and family commitments, whilst encouraging fathers to play a bigger role in bringing up their children; and
   e. Providing quality, affordable and accessible centre-based child care options.

2. The package has been progressively enhanced in 2004 and 2008. This year, the package will be further enhanced to cover a broad range of measures amounting to **$2 billion** a year.

   a. To help singles find their life partner, the Social Development Network reaches out to around 100,000 singles each year to provide them with more social interaction opportunities.
   b. To help couples set up home, HDB will be introducing the Parenthood Priority Scheme, which sets aside a proportion of new flats for first-timer married couples with children. HDB will also introduce the Parenthood Provisional Housing Scheme which allows first-timer married couples with children to rent a flat from HDB at an affordable rental rate while awaiting the completion of their flats.
   c. To help parents defray the costs of raising children, there is the Baby Bonus Scheme, tax benefits, as well as the new Medisave grant for newborns. Parents who send their children to infant and child care centres can also enjoy monthly subsidies of up to $600 and $300 respectively.
   d. To facilitate work-life harmony, working parents can enjoy maternity leave of 16 weeks and paternity leave of 1 week (with the option for fathers to share 1 week of maternity leave). To encourage sharing of parental responsibilities, each parent currently enjoys 6 days of child care leave per year for children under age 7. Parents of older children aged 7-12 will also be able to enjoy 2 days of child care leave per year. In addition, parents have the option to take 6 days of unpaid infant care leave per year to care for infants under age 2.
   e. To provide parents with child care options, the Government has focused on improving the quality, affordability and accessibility of child care services. Efforts have been stepped up to build new child care centres in housing estates with a high demand for centre-based care. To improve the quality of child care, the Government also funds scholarships and teaching awards to attract more teachers into the child care sector.

Altogether, the measures under the Marriage & Parenthood Package have benefitted about 350,000 families of children born since 2001. Encouraging marriage and parenthood is a priority for the Government, and we will continue to fine-tune our policies and measures to strengthen the pro-family environment in Singapore.

SUMMARY OF MARRIAGE & PARENTHOOD PACKAGE MEASURES

MEASURE	BENEFITS
GETTING MARRIED	
Finding a partner	The Social Development Network (SDN) facilitates social interaction among singles.
SETTING UP HOME[22]	
<NEW> Parenthood Priority Scheme	HDB will set aside a proportion of new flats for first-timer married couples with children.
<NEW> Parenthood Provisional Housing Scheme	First-timer married couples with children, who are waiting for their HDB flats to be completed, can rent a flat from HDB at an affordable rental rate
HAVING CHILDREN	
Medisave Maternity Package	Medisave can be used to help pay for delivery and pre-delivery expenses.
<ENHANCED> Co-funding for assisted reproduction technology (ART) treatment	Government will co-fund up to 75% of the costs of ART treatment received at public hospitals, with co-funding now extended to three fresh and three frozen cycles.[23] Couples with more than one child will now also be eligible for co-funding.
Medisave for assisted conception procedures	Up to $6,000, $5,000 and $4,000 can be used from couples' Medisave for the 1st, 2nd and 3rd time that Medisave is used for assisted conception procedures.
<ENHANCED> Accouchement fees for higher-order births	Accouchement fees in the public hospitals will no longer be differentiated across birth order.

[22] Priority is given to first-time applicants in purchasing HDB Build-to-Order flats. Young couples can also apply for CPF Housing Grants (such as the Family Grant and the Additional CPF Housing Grant) to help them finance the purchase of public housing.

[23] Capped at $6,300 and $1,200 respectively for fresh and frozen treatment cycles.

MEASURE	BENEFITS
RAISING AND CARING FOR CHILDREN	
<ENHANCED> Baby Bonus	Parents can get a cash gift of $6,000 each for their 1st and 2nd child, and $8,000 each for their 3rd and 4th child. Savings into their children's Child Development Account (CDA) will be matched dollar for dollar up to $6,000 each for their 1st and 2nd child, up to $12,000 each for their 3rd and 4th child, and up to $18,000 each from the 5th child onwards.[24]
<NEW> Medisave grant for newborns	Each newborn will receive a Medisave grant of $3,000.[25]
<NEW> Extended MediShield coverage	MediShield will be extended to cover congenital and neonatal conditions from 1 Mar 2013.
Parenthood Tax Rebate (PTR)	Parents can claim the PTR of $5,000 for their 1st child, $10,000 for their 2nd child, and $20,000 per child for all subsequent children.
Qualifying/ Handicapped Child Relief (QCR/HCR)	Parents can claim $4,000 per child under the QCR or $5,500 per child under the HCR.
Working Mother's Child Relief (WMCR)	Working mothers can claim the WMCR at 15% of earned income for their 1st child, 20% for their 2nd and 25% per child for all subsequent children.
Grandparent Caregiver Relief (GCR)	Working mothers whose children aged 12 and below are cared for by their grandparents can claim the GCR of $3,000.
Subsidies for centre based infant care & child care[26]	Parents can enjoy a monthly subsidy of up to $600 and up to $300 for infant care and child care respectively.
Foreign Domestic Worker Levy Concession	Parents can enjoy a $95 levy concession if they have a young child aged below 12 staying with them.

[24] With effect from 1 January 2013, the CDA will be extended by 6 years. This means that the CDA of a child will remain open until the end of the child's 12th year, instead of the 6th year.

[25] The grant will be disbursed in two tranches, at birth and when the child turns 1, subject to the child's continued enrolment under MediShield.

[26] The Government also seeks to ensure that parents have access to good quality and affordable child care. There are now over 1,000 child care centres as of November 2012, up from 750 in 2008. These centres have places for over 92,000 children compared to more than 63,000 in 2008.

MEASURE	BENEFITS
WORK-LIFE SUPPORT	
Maternity leave	Mothers have maternity leave of 16 weeks.[27]
<ENHANCED> Child care leave	Both parents have 6 days of paid child care leave per year each if they have at least one child aged below 7 years. Those with at least one child aged 7-12 years will have 2 days of paid child care leave per year.[28]
Infant care leave	Both parents have 6 days of unpaid infant care leave per year each if they have at least one child aged below 2 years.
<ENHANCED> Adoption leave	Adoptive mothers have adoption leave of 4 weeks.
<NEW> Government-Paid Maternity Benefit	Working women who do not currently qualify for any maternity leave can enjoy the Government-paid component of maternity leave in the form of cash benefits.
<ENHANCED> Extended maternity protection period	Working mothers are entitled to maternity leave benefits if they are dismissed without sufficient cause or retrenched within the full duration of their pregnancy.
Work-Life Works! (WOW!) Fund	Organisations can use the Fund to subsidise costs of consultancy and training leading to implementation of better work-life strategies.
ENCOURAGING SHARED PARENTAL RESPONSIBILITY	
<NEW> Paternity leave	Fathers have paternity leave of 1 week.
<NEW> Shared parental leave	Fathers can share 1 week of mothers' maternity leave.

[27] Working women who do not currently qualify for any maternity leave (e.g. shorter-term contract workers) will enjoy the Government-paid share of maternity leave in the form of a cash benefit.

[28] Parents with children in both age groups, i.e. those below 7 years, as well as those between 7 and 12 years, will have a total child care leave entitlement capped at 6 days per year for each parent.

LIST OF ACRONYMS AND ABBREVIATIONS

ABC Waters	Active, Beautiful and Clean Waters
ART	Assisted Reproduction Technology
ASEAN	Association of Southeast Asian Nations
BTO	Build-to-Order
CAGR	Compound Annual Growth Rate
CDA	Child Development Account
CDC	Community Development Council
CET	Continuing Education and Training
CPF	Central Provident Fund
DOS	Department of Statistics
e2i	Employment and Employability Institute
EC	Executive Condominium
FDW	Foreign Domestic Worker
GCR	Grandparent Caregiver Relief
GDP	Gross Domestic Product
GST	Goods and Services Tax
HCR	Handicapped Child Relief
HDB	Housing and Development Board
LFPR	Labour Force Participation Rate
LRT	Light Rail Transit
LTMP	Land Transport Master Plan
LTVP	Long-Term Visit Pass
LTVP+	Long-Term Visit Pass Plus
MOM	Ministry of Manpower
MRT	Mass Rapid Transit
MTI	Ministry of Trade and Industry
NIC	National Integration Council

LIST OF ACRONYMS AND ABBREVIATIONS

NPTD	National Population and Talent Division
NTUC	National Trades Union Congress
NUS	National University of Singapore
OECD	Organisation for Economic Co-operation and Development
PMET	Professional, Managerial, Executive and Technical
PR	Permanent Resident
PTR	Parenthood Tax Rebate
PwC	PricewaterhouseCoopers
QCR	Qualifying Child Relief
SC	Singapore Citizen
SDN	Social Development Network
STEP	Skills Training for Excellence Programme
TAFEP	Tripartite Alliance for Fair Employment Practices
TFR	Total Fertility Rate
WDA	Workforce Development Agency
WIS	Workfare Income Supplement
WMCR	Working Mother's Child Relief
WoW! Fund	Work-Life Works! Fund
WSQ	Workforce Skills Qualifications
WTS	Workfare Training Support
UK	United Kingdom
UN	United Nations

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