中国公益研究院
China Philanthropy Research Institute

中国养老产业基本格局与前途

the basic structure and prospect of Chinese eldercare industry

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一、中国老年服务的基本格局
the basic structure of Chinese eldercare service

中国的养老政策格局
Chinese elderly care policy

- 《中华人民共和国老年人权益保障法》（1996年颁布，2012年进行了全面修订）
- Law of the People’s Republic of China on Protection of the Rights and Interests of the Elderly (published in 1996 , revised in2012)
- 2007年建立起城乡最低生活保障制度
- the minimum living standard security system built in 2007)
- 2010年颁布《中华人民共和国社会保险法》，城乡居民保险制度建立
- Social Insurance Law of the People’s Republic of China published in 2010 , the establishment of insurance system for urban and rural residents
- 各级政府正在全面推进养老服务业的发展
- Governments at all levels are pushing forward the development of old-age services

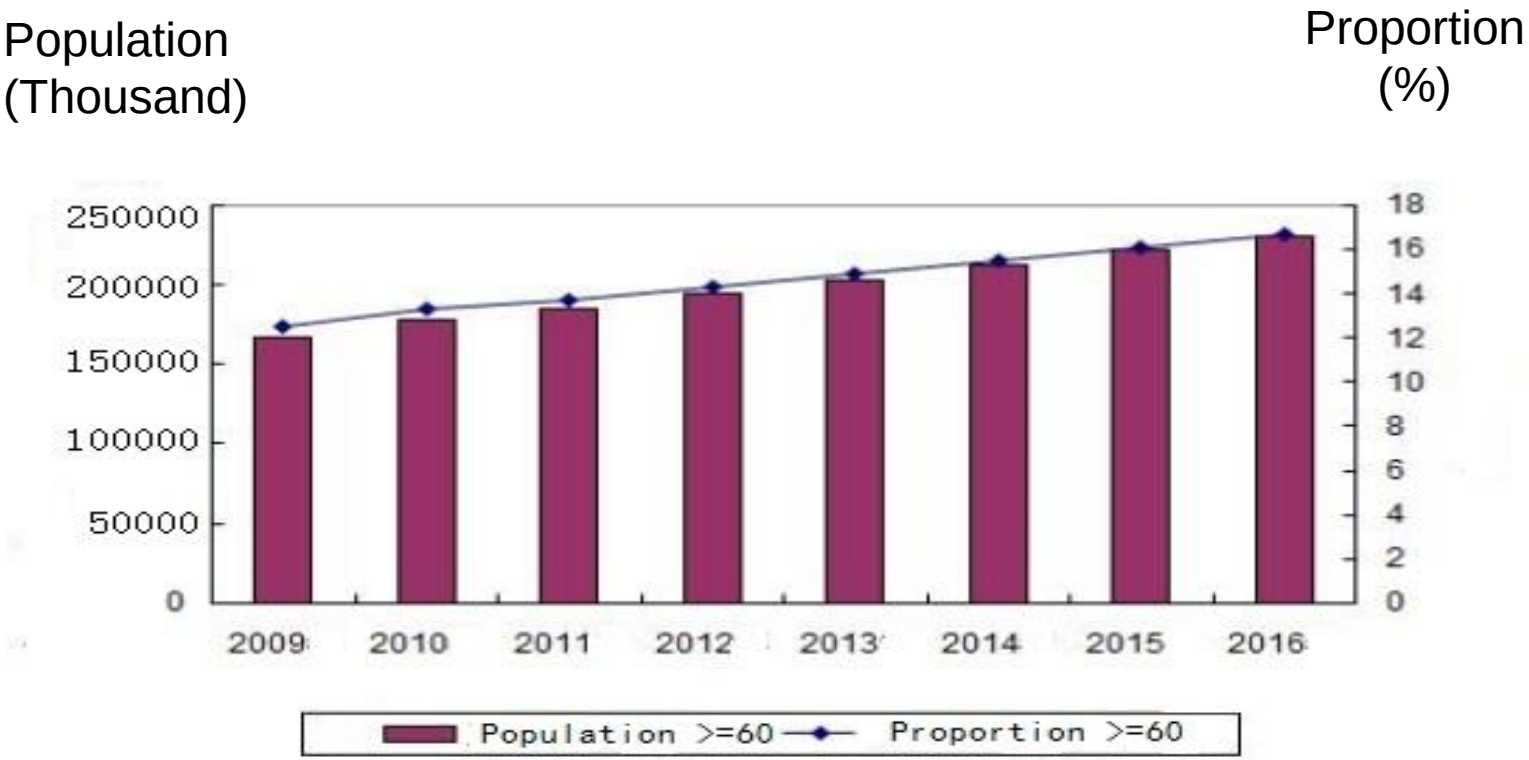
中国老龄化的基本趋势
Chinese aging trend

2016年底，中国60岁及以上老年人口23086万人，占总人口的16.7%，其中65岁及以上人口15003万人，占总人口的10.8%。整体上，老龄化不断加剧！

- There are 23,086 people aged 60 and over in China by 2016, accounting for 16.7% of the whole population.
- There are 15,003 people aged 65 and over in China by 2016, accounting for 10.8% of the whole population.

Indicator	2009	2010	2011	2012	2013	2014	2015	2016
Population≥60	16714	17765	18499	19390	20243	21242	22200	23086
Proportion	12.5	13.26	13.7	14.3	14.9	15.5	16.1	16.7

The proportion of elder people(who aged 60 and over) in the whole population of China



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中国的基本养老保险制度

the endowment insurance system in China

中国的基本养老保险制度包括两个方面：一是城镇职工基本养老保险制度；二是城乡居民基本养老保险制度

The basic endowment insurance system include two aspects : the basic endowment insurance for the urban working group and the basic endowment insurance for urban and rural residents.

2016年末中国参加基本养老保险人数为**88777** 万人，比上年末增加**2943** 万人。全年基本养老保险基金收入**37991** 亿元。

全年基本养老保险基金支出**34004** 亿元。年末基本养老保险基金累计结存**43965** 亿元。

By 2016， 887.7 million people participate in the basic endowment insurance.And the annual basic endowment insurance fund reached 379.91 billion yuan.

中国的城镇职工基本养老保险制度

the basic endowment insurance for the urban working group

2016年末中国参加城镇职工基本养老保险人数为37930 万人，比上年末增加2569 万人。其中，参保职工27826 万人，参保离退休人员10103 万人，分别比上年末增加1607 万人和962万人。年末参加城镇职工基本养老保险的农民工人数为5940万人，比上年末增加355 万人。年末城镇职工基本养老保险执行企业制度参保人数为34264 万人，比上年末增加1140 万人。

By 2016,379.3 million people participate in the basic endowment insurance for the urban working group.
Among them, there were 278.26 million employees and 10.3 million retirees.

The number of migrant workers participating in the basic endowment insurance for urban workers at the end of 2016 was 59.4 million.

全年城镇职工基本养老保险基金总收入**35058** 亿元。各级财政补贴基本养老保险基金**6511** 亿元。全年基金总支出**31854** 亿元。年末城镇职工基本养老保险基金累计结存**38580** 亿元。

The total income of the basic endowment insurance fund for urban workers was 3505.8 billion yuan.

The total annual fund expenditure was 318.54 billion yuan.

At the end of the year, the basic old-age pension insurance fund for urban workers accumulated 3858 billion yuan.

中国的城乡居民养老保险制度

the basic endowment insurance for urban and rural residents in China

2016年末城乡居民基本养老保险参保人数50847 万人，比上年末增加375 万人。其中实际领取待遇人数15270 万人。By 2016, 508.47 million people participate in the basic endowment insurance for the urban and rural residents.

全年城乡居民基本养老保险基金收入2933 亿元，其中个人缴费732 亿元。基金支出2150 亿元。基金累计结存5385 亿元。 The annual income of the basic old-age pension insurance fund for urban and rural residents was 293.3 billion yuan, of which 73.2 billion yuan was spent on individuals，and 215 billion yuan was paid by the fund.

2016年末全国有7.63 万户企业建立了企业年金，比上年增长1.1％。参加职工人数为2325 万人。年末企业年金基金累计结存11075 亿元。

At the end of the year, 763, 000 enterprises in the country established the enterprise annuity, increasing1.1 percent from the previous year.And 23.25 million employees participated.

Enterprise annuity fund accumulates 1107.5 billion yuan at the end of the year.

中国养老服务的支撑系统

supporting system for China's eldercare services

中国共有老龄事业单位1828个，老年法律援助中心1.9万个，老年维权协调组织7.0万个，老年学校5.4万个、在校学习人员710.2万人，各类老年活动室35.9万个；

享受高龄补贴的老年人2355.4万人；享受护理补贴的老年人40.5万人；享受养老服务补贴的老年人282.9万人。

In China，there are 1,828 elderly institutions,19, 000 senior legal aid centers,70,000 elderly rights organizations,54, 000 elderly schools in China.

There are 7102,000 students in elderly schools and 359,000 all kinds of Senior Citizen Activity Centers.

There were 235.54 million elderly people be entitled to old-age subsidies, 405, 000 elderly people be entitled to nursing subsidies and 28.29 million elderly people be entitled to eldercare service subsidies.

中国的养老服务
Chinese eldercare service

中国各类养老服务机构和设施**14.0**万个，比上年增长**20.7 %**，其中注册登记的养老服务机构**2.9**万个，社区养老服务机构和设施**3.5**万个，社区互助型养老设施**7.6**万个；

各类养老床位合计**730.2**万张，比上年增长**8.6%**（每千名老年人拥有养老床位**31.6**张，比上年增长**4.3%**）,其中社区留宿和日间照料床位**322.9**万张。

There are about 140,000 eldercare services organizations and facilities in China. Among them,29,000 organizations are registered.And there are 35, 000 eldercare services organizations and facilities in community.

There are a total of 732,000 nursing home beds for elderly，（31.6 beds/per thousand elder people）.Among them, 3229 thousand beds are day care beds and overnight-in-the-community beds.

二、中国养老产业的结构性矛盾

structural issue in China's eldercare industry

中国养老服务业缺乏专业化

Chinese eldercare service industry is lack of professionalization

中国各类护理员培训学校不足：截至**2017**年**9**月**4**日，全国有**159**所高等职业院校开设老年服务与管理专业，在校学生不足万人。

国家尚缺乏更为具体规范的养老服务培训教材

持证上岗的养老护理人员为十万多人

The number of Chinese nursing staff training school are inadequate. By the time of September 4th,2017,there are 159 colleges and universities in the country that have geriatric service and management major, with less than 10,000 students.

And we are lack of specific and standard eldercare service training textbooks.

The nursing personnel who have the license are more than 100,000 people.

养老服务缺乏护理人员

lack of caregivers for eldercare service

中国养老机构的工作人员不到30万人，机构建设相当薄弱

指标 Indicator	数量 Quantity	职工人数（千） Number of Staffs （Thousand）	床位数（千） Number of Beds (Thousand)	收养人员（千） Number of Elderly (Thousand)
城市养老机构 Urban Nursing Homes	8,891	150	1,360	681
农村养老机构 Rural Nursing Homes	15,398	112	1,799	1,132

There are fewer than 300, 000 workers in China's eldercare institutions, and the construction of these institutions are rather weak.

养老服务的民办机构发展不足

The development of private institutions for eldercare services is inadequate

2016年底，中国民办的养老机构为12058个，职工人数为170434人，床位1634880张，在院人数841084人，营业利润107081.7万元。

By 2016,the number of eldercare institutions in China is 12,058, with 170,434 workers and 1,634,880 beds, and 841,084 old people in the hospital, with operating profit of 1,070,817 million yuan.

中国的养老产业处于转型时期

Chinese eldercare industry is in transition

如何发展中国的养老护理业，决定着中国养老服务业的前途。

How to develop China's eldercare nursing industry determines the future of Chinese eldercare service industry.

三、中国养老产业的基本挑战

The challenges of China's eldercare industry

730.2万张床位与谁来使用？

who will use the 7,302,000 beds？

失能半失能老年人与社区不对接

Disabled elder people can not connect with the community.

失能的老年人各个社区真正掌握了吗？

据新华社北京2016年 10月9日电（记者王思北）全国老龄办、民政部、财政部9日在京共同发布第四次中国城乡老年人生活状况抽样调查结果。调查结果显示，我国失能、半失能老年人大致4063万人，占老年人口18.3%。

the results of the 4th survey on the living condition of the elder people in urban and rural areas in China shows that the number of disabled elder is 4.063 million, accounting for 18.3 percent of the elderly population.

养老机构与需要护理人员对接不足

The number of eldercare institutions do not match the number of elder people who need to be care.

2016年末城市养老机构为8891个，床位1359493张，在院人数680926人，其中：完全自理377392人，占55.4%；半自理163406人，占24.0%；不能自理140128人，占20.6%。

与此同时，农村养老机构15398个，床位1799248张，在院人数为1132253人，其中，完全自理852988人，占75.3%；半自理215110人，占19.0%；不能自理64155人，占5.7%。

In the end of 2016,the number of urban eldercare institution is 8,891, with 1,359,493 beds and 680,926 people.Among them,377,392 people can look after themselves, accounting for 55.4percent.

At meantime,the number of rural eldercare institution is 15,398, with 1,799,248 beds and 1,132,253 people.Among them, 852,988 people can look after themselves, accounting for 75.3percent.

养老护理经费与所需人员对接不足

The expenditure of eldercare nursing is not enough for the old people.

2016年末，全国享受高龄补贴的老年人2355.4万人，享受护理补贴的40.5万人，享受养老服务补贴的老年人282.9万人！

与4063万失能、半失能老年人对接不足！

In the end of 2016,there were 235.54 million elderly people be entitled to old-age subsidies, 405, 000 elderly people be entitled to nursing subsidies and 28.29 million elderly people be entitled to eldercare service subsidies.

But the number of disabled elder people is 4.063 million！

三个对接不足严重制约养老产业

This three deficiencies seriously restrict the development of eldercare industry.

企业、中央和地方政府、社会着急但基层不急！

养老机构仍然以生活养老为主而不是护理为主因而不需要专业技术！

财政资金与急需的护理人员不对接也不会促成护理行业与产业的发展！

The entrepreneur、central and location government are worried right now.

The eldercare institutions are still focus on life support rather than nursing care.

Inadequate financial support will not be able to facilitate the development of the eldercare nursing industry.

四、中国养老产业的历史性机遇

The Historical Opportunities for Chinese Elderly Care Industry

床位建设的转型

Transformation of the Beds Construction

世界范围内社区养老服务业兴起

Globally Rising of Community Elderly Care Industry

地方政府的积极推动

Active Promotion of the Local Government

各级政府和企业的积极投入

Active Involvement of All Levels of Government and Enterprises

北京、深圳与安徽省的积极行动

The active actions of Beijing, Shenzhen and Anhui Province

北京：推动全面的改革

Beijing: Promoting the comprehensive reform

深圳：建立企业养老产业的总部集聚区

Shenzhen: Establishing the headquarter gathering area for elderly care enterprises

安徽：全面开展养老护理等级的普查

Anhui: Conducting the comprehensive census for the grading of elderly care (nursing) services

2016年底，全国各类养老床位达到730.2万张（达到每千人拥有养老床位31.6张），其中社区留宿和日间照料床位322.9万张！

In the end of 2016, different types of elderly care beds has reached a total of 7.302 million nationwide (31.6 beds per 1000 people), with the number of 3.227 million beds for community accommodation and day care.

大规模床位建设的的阶段已经结束，养老事业开始重大的结构转型，转向以人为本的服务！

The large scale construction of beds has finished. Elderly care has begun a significant structural transformation, turning to the people-oriented services.

在世界范围内，养老回归社区，综合养老社区成为一种新的潮流！

各项技术与信息服务和志愿服务兴起，中国企业的养老拓展力量和公益慈善力量在发展。

Worldwide, the elderly care is returning to the community. Integrated elderly care communities is becoming a new trend!

Various kinds of technology, information services, and volunteer services are rising. The Chinese enterprises are developing their expanding ability and the philanthropic power towards the elderly care.

如何促成这些新要素的组合与结合？

How to facilitate the combination and integration of the new elements?

国际教育培训的资源需要引进

The Need of Introducing International Teaching and Training Resources

开发转型性的培训教材

Developing transitional training materials

研究、咨询与培训的结合

The combination of research, counseling and training

示范性基地与项目的拓展

The expansion of demonstrative bases and programs

中国养老产业需要引进合作的平台

Chinese Elderly Care Industry Needs to Introduce Collaboration Platforms

可否建立中德合作的养老护理培训学院？

可否与中国养老产业联盟的单位展开深度合作？

可否建立中德养老护理合作示范基地？

Is it possible to establish a Sino-German cooperative training institute for elderly care (nursing) services?

Is it possible to carry out in-depth cooperation with the China eldercare industry consortium？

Is it possible to establish Sino-German cooperative experimental program?