

Aged Care Training & Skills Development in China

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INTRODUCTION

MAIN SECTIONS OF THIS PRESENTATION

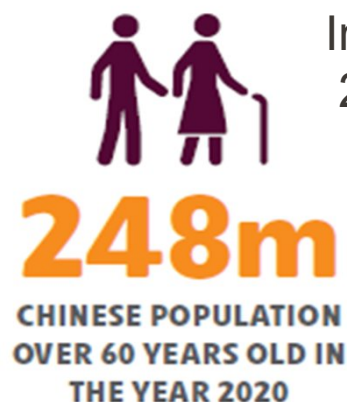
- A Snapshot of the big picture
- Policy Update
- Austrade Activities in China
- Chinese VET Reforms & Implications

AGED CARE TRAINING & SKILLS DEVELOPMENT

A SNAPSHOT



Aged Care Training and Skill Development in China



In 2020, China's population is expected to reach 1.4 billion of which 248 million will be aged 60 years and above.

Table 1: Number of health and medical institutions in China

| INSTITUTION | NUMBER |
|----------------------------------|-------------|
| Medical institutions | 990,248 |
| Hospitals | 27,215 |
| Hospital beds | 5.3 million |
| Community health service centres | 34,588 |
| Clinics | 195,866 |
| Aged care institutions | 28,000 |
| Aged care beds | 6.7 million |

Source: Statistical Communique of the People's Republic of China on the 2015 National Economic and Social Development, National Bureau of Statistics of the PRC, February 2016.

Table 2: Number of public and private hospitals

| | 2014 | 2015 |
|------------------|--------|--------|
| Public hospital | 13,341 | 13,304 |
| Private hospital | 11,963 | 13,600 |

Source: National Health and Family Planning Commission as at September 2015.

Aged Care Training and Skill Development in China

SIZE OF HEALTH AND AGED CARE SERVICES WORKFORCE



8.0m

HEALTH WORKERS



3.3m

REGISTERED NURSES



3.0m

REGISTERED DOCTORS
& PROFESSIONAL ASSISTANT
MEDICAL PRACTITIONERS

Source: 2016–2022 Research
Report on China Aged Care Market
and Trend, May 2016.

- ❖ Human resource capacity development in aged care is in urgent demand in China.
- ❖ China requires a workforce of 10 million to care for its projected elderly population of 248 million in 2020.
- ❖ The current workforce comprises nurses and ad-hoc care workers.
- ❖ China has not yet established a standards-based nationwide training system for these workers.
- ❖ Main channels to obtain training
 - ✓ Academic institution (Universities/Vocational education institutions)
 - ✓ Tailored training courses
 - ✓ On-the-job training
 - ✓ Overseas short-term study tour and programs

AGED CARE TRAINING & SKILLS DEVELOPMENT

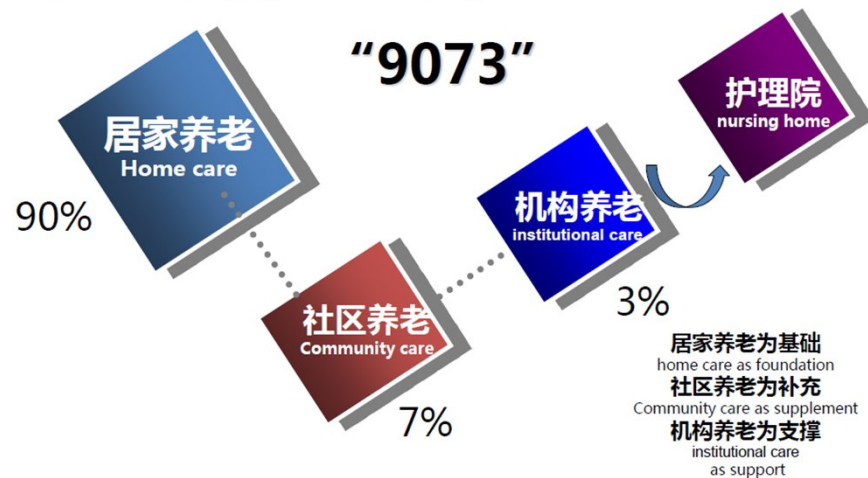
POLICY UPDATE





REGULATION AND POLICY UPDATE

“十二五” 规划国家养老战略目标
Aged Care strategic goal of 12th Planning



Policy initiatives: national ‘90-7-3’ policy and the ‘90-6-4’ policies in some cities such as Shanghai and Beijing.

--90 per cent of the elderly to be cared for at home, 7 per cent (or 6 per cent) at community care centers, and the remaining 3 per cent (or 4 per cent) at nursing homes.

Government vision for aged care reform by 2020

- 7 to 8 million care beds (up from 5 million)
- Workforce of 10 million (up from 1 million)
- Greater engagement of private and foreign investment
- Government education program about healthy living among the elderly
- Combine aged care with family support – in-home care



REGULATION AND POLICY UPDATE

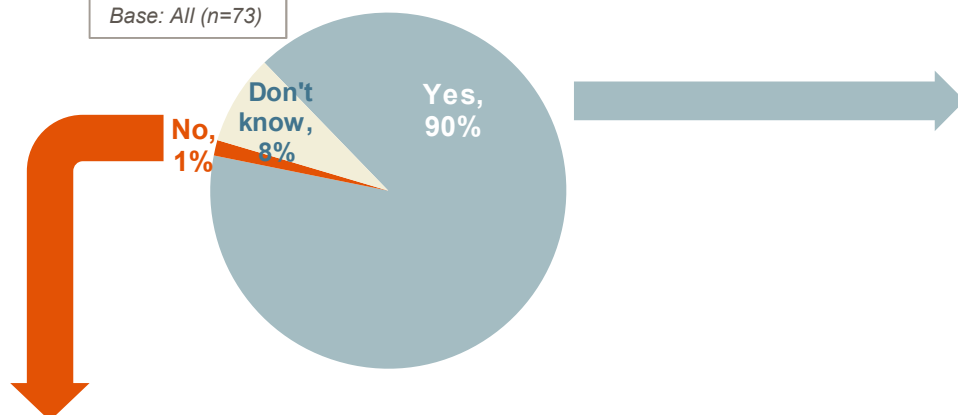
- In Nov 2013, the Ministry of Civil Affair has announced the implementation of *online training* of national aged care workforce nation wide.
- Detailed training incentives are carried out at municipal level and district levels.
- Since 2013, local government authorities in some cities provide subsidies and encouragement for aged care training courses in vocational colleges.
- The 13th Five-Year-Plan (2016-2020) has highlighted:
 - ✓ Innovation - Encourage social engagement on investment and tourism
 - ✓ From basic living standard to quality retirement life
 - ✓ Develop rural areas by allowing more aged care facilities to be built outside of cities
- China-Australia Free Trade Agreement (ChAFTA) commitment in aged care facilities and hospitals.



APPETITE FOR EXPORT FROM AUSTRALIA

Management commitment to establish or expand overseas delivery

Base: All (n=73)



Reasons given ("no" or "don't know")

| | |
|--|---|
| Lack of information on overseas markets | 2 |
| Lack of resources | 2 |
| Lack of support or interest from management | 1 |
| Lack of prospective leads or qualified customers | 1 |
| Difficulty finding customers willing to pay a commercial rate for the cost of delivery | 1 |
| Difficulty in maintaining quality training standards | 1 |
| Strength of domestic demand leaves no capacity to pursue export | 2 |
| Other reasons given | 3 |

Base: Those with no management commitment to establish or expand overseas delivery (n=7); number of respondents giving each answer shown; multiple responses accepted.
Q18. Which, if any, of the following are most limiting your organisation's ability to pursue overseas delivery of your aged care related training courses or programs?

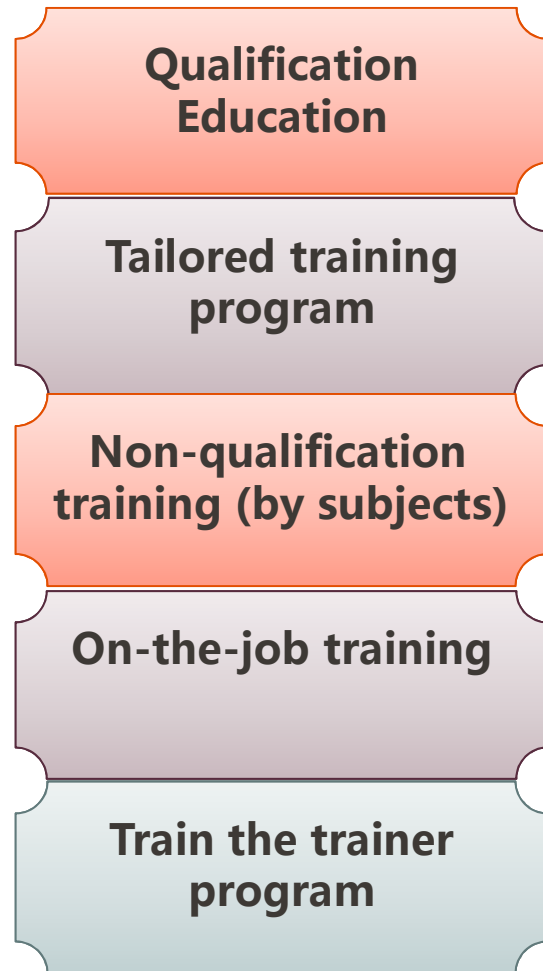
Markets of interest (Top 10, with top 3 mentions highlighted)

| | | |
|--|-------------|-----|
| | China | 79% |
| | India | 68% |
| | Philippines | 65% |
| | Malaysia | 47% |
| | Indonesia | 46% |
| | Singapore | 42% |
| | Vietnam | 39% |
| | Hong Kong | 38% |
| | Japan | 33% |
| | Thailand | 27% |

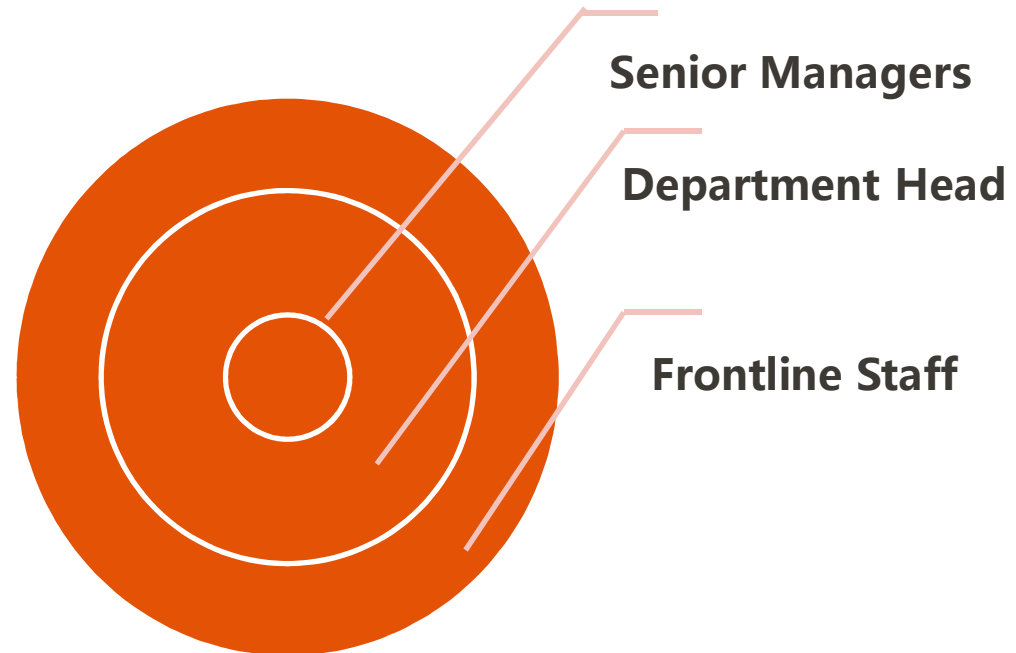
Base: Those confirming management commitment to establish or expand overseas delivery (n=66); multiple responses accepted
Q19a/b. Which markets is your organisation interested in?



OPPORTUNITIES FOR AUSTRALIAN INDUSTRY IN CHINA



Training for Human Resources of Aged Care



AGED CARE TRAINING & SKILLS DEVELOPMENT

ACTIVITIES-AUSTRADE





RECENT ACTIVITIES

EVENTS in FY 15-16

- ✓ Australian - Sichuan Age Care Vocational Forum (April 2015)
- ✓ Australia-China International Aged Care Summit (November 2015)
- ✓ Australia Week in China (AWIC) – health & aged care stream (April 2016)

EVENTS in FY 16-17

- ✓ Australia-China Aged Care Seminar, Guangzhou (Nov 2016)
- ✓ Australia-China Health Innovation Summit, Beijing (May 2017)
- ✓ Australia Aged Care Training Demo Class Roadshow, Beijing, Shanghai, Chengdu (May 2017)

SICHUAN VET FORUM ON AGED CARE AND HEALTH



- **3** provincial departments
- **15** Australian institutions
- **77** Chinese organisations
- **4** site visits
- **9** presentations
- **2** B2B matching sessions



AUSTRALIA CHINA INTERNATIONAL AGED CARE SUMMIT



- From Australia: 75 companies, 150 delegates
- From China almost 500 customers, 17 provinces
- Strong media interest – AFR, CNTV etc.
- Education and Training Stream - Largest (Australia: 41; China: 240)
- Ministerial involvement – State and Federal



AWIC 2016 – HEALTH AND AGED CARE STREAM

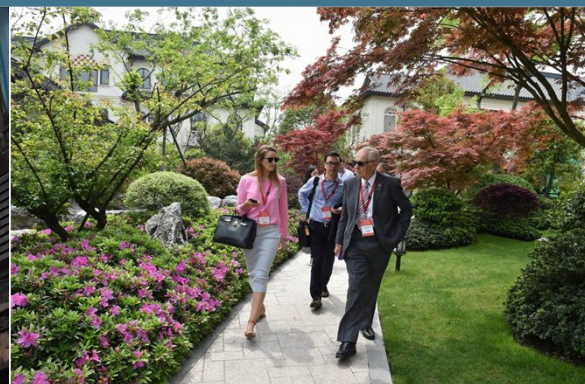


AUSTRALIA-CHINA HEALTH AND AGED CARE INDUSTRY FORUM: COOPERATION AND OPPORTUNITIES

- *“Healthy ageing: Challenges and opportunities in China’s aged care industry development”, National Health and Family Planning Commission*
- *“Smart Beijing: Implications for the health industry”, Beijing Municipal Commission of Economy and Information*
- *Fosun’s global strategies: Opportunities to link Fosun and Australia, Fosun Healthcare Holdings*
- *The growth of health services: Applying new learnings, Aspen Medical*
- *Investment opportunities between Australia-China health services industry, Tasly Medical & Health Investment Management Co., Ltd*
- *Australia’s relevance to aged care in China: An old hand in a new market, Royal District Nursing Service*
- *Comparison of long-term elderly care between China and Australia, Beijing Geely University*



AWIC 2016 – HEALTH AND AGED CARE STREAM



WUZHEN, ZHEJIANG

**VISIT GREENTOWN YA
YUAN COMMUNITY &
YADA INTERNATIONAL
REHABILITATION
HOSPITAL**



SHANGHAI

**Visit AVEO China
Retirement Village**



SHANGHAI

**Ethos World opening
ceremony**



Australia Aged Care Training Demonstration Class Roadshow



- Time: March 2017
- Location: Beijing, Shanghai, Nanjing, Chengdu (TBC)
- **Non-credential training**
- Target audience:
 - › Government officials
 - › Aged care facilities, hospitals and community healthcare centre
 - › Universities and colleges
 - › Local aged care training organizations

- Event agenda (TBC)
 - › Introduction on Australian capabilities, system and accreditation in aged care training
 - › Demonstration class 1: (Basic) demo courses from Certificate III or IV
 - › Demonstration class 2: (Specialized) demo courses on dementia care
 - › Demonstration class 3: (for Senior Management people) demo courses on aged care facility management
 - › Discussion: how to integrate Australian training capabilities in China's aged care work force development

› Business networking

AGED CARE TRAINING & SKILLS DEVELOPMENT

VET REFORMS AND IMPLICATIONS





EMERGING TRENDS & OPPORTUNITIES ARISING FROM VET REFORM IN CHINA

- Improving vocational education quality
- Accelerating rural vocational education
- Building vocational education capacity
- Restructuring life-long education system
- Expanding VET internationalization
- Accelerating ICT application in VET





MORE ON VET MARKET IN CHINA

- Austrade's Market Information Package (MIP) articles
 - › Accessing the China VET sector: unlocking opportunities (10 Feb 2016)
 - › Spotlight on China's VET reform and policy changes (22 Jan 2016)
- For any enquiries about the MIP, please email mip@austrade.gov.au



RECOMMENDATIONS

- ✓ Complex market with highly diversified potentials across a wide range of sectors
- ✓ Different collaboration models have different pros and cons
- ✓ Sensible location selection is critical to utilize favorable local policies
- ✓ Financing channels for aged care projects
- ✓ Know yourself, know your competitors
- ✓ Know the market

Thank you !



Australian Government
Austrade

