

**国际研讨会**  
**健康老龄化：中、德、日的多学科研究**

International Workshop  
**Well-being in Ageing Societies:  
Perspectives from China, Germany and Japan**

**主 办**

中国社会科学院人口与劳动经济研究所

德国日本研究所

德国老年学研究中心

***Organized by***

Institute of Population and Labor Economics (IPLE), Chinese Academy of Social Sciences  
(CASS), PR China

German Institute for Japanese Studies (DIJ) Tokyo, Japan

German Centre of Gerontology (DZA), Germany



**Deutsches Institut für Japanstudien**  
German Institute for Japanese Studies Tokyo (DIJ)  
ドイツ日本研究所



**DZA** | German Centre  
of Gerontology

**23 – 25 October 2013, Beijing**

**2013 年 10 月 23-25 日，北京**



## International Workshop

### Well-being in Ageing Societies: Perspectives from China, Germany and Japan

#### *Supported by*

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The **German Institute for Japanese Studies (DIJ) Tokyo** was established in 1988 and is charged with investigating contemporary Japan, its economy, society, politics, and culture. It belongs to the Max Weber Foundation, ([www.maxweberstiftung.de](http://www.maxweberstiftung.de)), which is funded by the German Ministry of Education and Research. The DIJ is independent in setting its research agenda. By investigating the economy, society, politics and culture of contemporary Japan, the DIJ seeks to advance knowledge about Japan and contribute to mutual understanding. The DIJ also sees itself as an "on-site" center for research on Japan, actively involved in international cooperation. Since March 1997, the DIJ has been holding open lectures called DIJ Forum. In these lectures, internationally established scholars discuss topics of general interest. Further information: [www.dijtokyo.org](http://www.dijtokyo.org)

The workshop will be held on the premises of the **Institute of Population and Labor Economics (IPLE), Chinese Academy of Social Sciences (CASS)**, in Beijing. The Institute of Population and Labor Economics, Chinese Academy of Social Sciences (IPLE-CASS), was established in 1980 and the current director is Professor CAI Fang. IPLE participates in the researches of demography, labour economics, social security theories, and questions of population and labour employment. The research interests include: demographic theories, demographic policy, demographic economics, labour economics, labour and social security, employment and human resources, demography and social development, demographic statistics, ageing society, migration and urbanization, demographic history, and so on. Further information: <http://iple.cass.cn/>

The **German Centre of Gerontology (DZA) Berlin** is a leading institute for scientific research and documentation in the fields of social and behavioural ageing research with the focus on the investigation of the living arrangements, life situations, and life-styles of ageing people in the societal and policy context. Research projects are conducted regarding the topics "work and retirement", "economy of old age", "health and social care", "family and social relations" and "societal participation". Based on this research the DZA conducts social reporting, independent policy consulting and offers information services for the public. The DZA is funded by the Federal Ministry Affairs, Senior Citizens, Women and Youth. Various projects are also supported by other sources. Further information: [www.dza.de](http://www.dza.de)

The workshop is supported by the **Stiftung Mercator**, one of the largest private foundations in Germany. Further information: <http://www.stiftung-mercator.de/en/the-foundation.html>

**Purpose of the workshop:**

The overall aim of this workshop is to bring together international experts studying the relationship between objective and subjective well-being and older adults/ageing societies in various fields to present their latest ideas and empirical research in order to help develop an agenda for future research on well-being in the ageing society. The discussion will focus on China, Japan, and Germany, as these societies represent different stages of economic development, speed of demographic change, cultural values concerning families and older people, and social policies which vary widely due to specific circumstances and historical path dependence. We plan to discuss three general questions:

- a) How do well-being, satisfaction, and happiness change over the life course in China, Japan, and Germany?
- b) What are the individual, economic, and societal factors that affect well-being, satisfaction, and happiness of older adults in China, Japan, and Germany?
- c) Which societal institutions, cultural frameworks and social policies help to enhance the well-being, satisfaction, and happiness under conditions of population ageing in China, Japan and Germany?

After comparing the demographic situation in China, Japan, and Germany, empirical evidence on psychological well-being over the life course in these three countries will be discussed, concentrating on the individual factors that influence life satisfaction and happiness as people age. We will then move on to discuss the role of societal and economic factors for subjective well-being. Finally, we will focus on policies for active ageing and well-being in ageing societies. We hope that the comparative perspective of the workshop will be productive for learning from each other in terms of general challenges and opportunities that China, Japan, and Germany are facing due to demographic and social changes. Despite the many differences between the three countries in regards to economic development, social structure and political system notwithstanding, they share the challenge of rapid population ageing.

The presentations are intended to stimulate discussion of research topics, methods and ideas that could suggest new avenues for studying the well-being of people in ageing societies from a cross-cultural perspective. Hence, the presentations should be brief and concise (10 minutes maximum) and focus on the three questions posed above. (a) life course trajectories of well-being; (b) individual, economic, and societal factors affecting well-being in late life; (c) institutions, cultural values, economic factors and social policies enhancing well-being.

The workshop is expected to facilitate future collaborative studies among participants. By focusing on the discussion among experts from various disciplines we hope to encourage the cross-pollination among disciplines and leverage the creative potential of our cross-national and multi-disciplinary setting.

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## PROGRAM AGENDA

### Day 1, Wednesday, October 23, 2013

18:00-19:30	<p><b>Welcome and Keynote Panel</b></p> <p><b>Welcome:</b></p> <p>Prof. Dr. Fang Cai, Director of IPLE-CASS, PR China  Prof. Dr. Clemens Tesch-Roemer, Director, DZA, Germany  Prof. Dr. Florian Coulmas, Director, DIJ, Japan  Dr. Florian Kohlbacher, Head of Business &amp; Economics Section, DIJ, Japan</p> <p><b>Keynote Panel: Visions for the Ageing Societies of China, Germany and Japan</b></p> <p>Panel chair: Prof. Dr. Florian Coulmas, Director, DIJ, Japan</p> <p>Speakers:</p> <ol style="list-style-type: none"> <li>1. Preparing for an ageing society, by <b><i>Prof. Dr. Zhenzhen Zheng, Professor, IPLE-CASS, China</i></b></li> <li>2. The demographic change – a challenge for the individual and the society, by <b><i>Prof. Dr. Ursula Lehr, President, BAGSO, the German National Association of Senior Citizens' Organizations, Germany</i></b></li> <li>3. Happiness in Germany: Challenges for a Demographically Changing Society, by <b><i>Prof. Dr. Clemens Tesch-Roemer, Director, DZA, Germany</i></b></li> <li>4. Early- and Late-onsets of Disability in Aged Society, by <b><i>Prof. Dr. Hiroko Akiyama, University of Tokyo, Japan</i></b></li> </ol> <p><b>Special presentation and demonstration of Paro</b></p> <p>Technology Solutions for the Ageing Society: The Case of Care Robotics</p> <p>Speaker:</p> <p>Therapeutic Seal Robot, PARO, as Biofeedback Medical Device in Dementia Care, by <b><i>Prof. Dr. Takanori Shibata, National Institute of Advanced Industrial Science and Technology (AIST), Japan</i></b></p>
19:30-21:00	Welcome Dinner

**Day 2, Thursday, October 24, 2013**

9:00-9:15	<b>Keynote Speech</b> Dr. Xiao Caiwei, Vice President, China National Committee on Ageing
9:15-10:45	<b>Session I: The Individual (Psychological issues)</b>  Chair: Prof. Dr. Clemens Tesch-Roemer  <ol style="list-style-type: none"> <li>1. Stable subjective well-being of the Chinese elderly in the past 20 years, by <b>Prof. Dr. Buxin Han, Institute of Psychology, Chinese Academy of Sciences, China</b></li> <li>2. Well-being across the life-span: The German perspective, by <b>Prof. Dr. Michael Eid, Faculty of Education and Psychology, Free University Berlin, Germany</b></li> <li>3. Determinants and effects on well-beings of productive activities in late-middle aged and aged Japanese: Longitudinal analysis of two representative panels, by <b>Prof. Dr. Hiroshi Shibata, University of Human Arts and Sciences, Japan</b></li> </ol> <p>Each speaker will give a concise input (max. 10 min) on research results which helps to discuss the following questions:</p> <ul style="list-style-type: none"> <li>- How does well-being change over the life course?</li> <li>- What are important psychological factors affecting well-being over the life course?</li> </ul> <b>Discussion</b>
10:45-11:15	Coffee break



11:15-12:45	<p><b>Session II: The Society (Sociological issues)</b></p> <p>Chair: Prof. Dr. Hiroko Akiyama</p> <ol style="list-style-type: none"> <li>1. China's population aging and health system reform, <i>by Prof. Dr. Xuejin Zuo, Shanghai Academy of Social Sciences, China</i></li> <li>2. Ageing, Later Life and Social Change in Germany, <i>by Dr. Andreas Motel-Klingebiel, DZA, Germany</i></li> <li>3. Gender differences in well-being over the life course: a case in Japan, <i>by Prof. Dr. Takako Sodei, Ochanomizu University, Japan</i></li> </ol> <p>Each speaker will give a concise input (max. 10 min) on research results which helps to discuss the following questions:</p> <ul style="list-style-type: none"> <li>- What are important social issues related to ageing?</li> <li>- How do these social issues of ageing affect well-being over the life course?</li> </ul> <p><b>Discussion</b></p>
12:45-14:00	Lunch Break
14:00-15:30	<p><b>Session III: The Economy (Economic and business issues)</b></p> <p>Chair: Prof. Dr. Xuejin Zuo</p> <ol style="list-style-type: none"> <li>1. An overlook at a booming mature industry in Chinese ageing society, <i>by Prof. Dr. Jiehua Lu, Department of Sociology, Peking University, China</i></li> <li>2. The Impact of Aging on the European Economy and its Implications for the International Division of Labor, <i>by Prof. Dr. Axel Boersch-Supan, Max Planck Institute for Social Law and Social Policy, Munich Center for the Economics of Aging, Germany</i></li> <li>3. Consumer Well-being in Later Life: Conceptual Foundations and Preliminary Empirical Evidence, <i>by Dr. Florian Kohlbacher, DIJ, Japan</i></li> </ol> <p>Each speaker will give a concise input (max. 10 min) on research results which helps to discuss the following questions:</p> <ul style="list-style-type: none"> <li>- What are the economic and business challenges of ageing societies?</li> <li>- How do these economic and business challenges affect well-being over the life course?</li> </ul> <p><b>Discussion</b></p>

15:30-16:00	Coffee break
16:00-17:30	<p><b>Session IV: Technology</b></p> <p>Chair: Dr. Florian Kohlbacher</p> <ol style="list-style-type: none"> <li>1. Understanding Gerontechnology Acceptance by Elderly Hong Kong Chinese: A Senior Technology Acceptance Model, <i>by Dr. Ke Chen, Department of Systems Engineering and Engineering Management, City University of Hong Kong, China</i></li> <li>2. A Robot for my Grandma? Opportunities and Barriers of Assistive Technologies for the Elderly in Germany, <i>by Dr. Birgid Eberhardt, SIBIS, Germany</i></li> <li>3. Gerontechnology for successful aging: From compensation to enhancement, <i>by Dr. Ryoko Fukuda, Department of Environment and Information Studies, Keio University, Japan</i></li> </ol> <p>Each speaker will give a concise input (max. 10 min) on research results which helps to discuss the following questions:</p> <ul style="list-style-type: none"> <li>- What kind of technologies can contribute to successful ageing and/or active ageing?</li> <li>- How do technologies affect well-being over the life course?</li> </ul> <p><b>Discussion</b></p>
18:30	Networking dinner

**Day 3, Friday, October 25, 2013**

9:00-10:30	<p><b>Session V: Actively designing Well-being in Ageing Societies (Policy issues)</b></p> <p>Chair: Prof. Dr. Axel Boersch-Supan</p> <ol style="list-style-type: none"> <li>1. Aging Policies in China: from “rights protection” to “integrated development”, by <i>Prof. Dr. Jian Song, Population and Development Center, Renmin University, China</i></li> <li>2. Policy interventions to enhance active ageing in Germany, by <i>Dr. Frank Berner, DZA, Germany</i></li> <li>3. How Did Japanese Social Policies Effect on Well-being for Older Persons? By <i>Prof. Dr. Takeo Ogawa, Kumamoto Gakuen University, Japan</i></li> </ol> <p>Each speaker will give a concise input (max. 10 min) on research results which helps to discuss the following questions:</p> <ul style="list-style-type: none"> <li>- What are policies for successful ageing and/or active ageing?</li> <li>- How do these policies affect well-being over the life course?</li> </ul> <p><b>Discussion</b></p>
10:30-11:00	Coffee break
11:00-12:30	<p><b>Session VI: Discussion and Wrap-Up</b></p> <p>Topic: The road ahead: Collaboration, research, action</p> <p>Facilitators:</p> <p>Prof. Dr. Zhenzhen Zheng, Professor, IPLE-CASS, China</p> <p>Prof. Dr. Florian Coulmas, Director, DIJ, Japan</p> <p>Discussants: All</p>
12:45	Lunch
14:00-17:00	- visit to ZhongYi Ageing Development Center

## 会议日程

10月23日（星期三），北京诺富特三元酒店一层

18:00-19:30	<p><b>致 辞：</b></p> <p>蔡昉教授，中国社会科学院人口与劳动经济研究所所长</p> <p>Clemens Tesch-Roemer 教授，德国老年学研究中心主任</p> <p>Florian Coulmas 教授，德国日本研究所所长</p> <p>Florian Kohlbacher 博士，德国日本研究所商业和经济学科负责人</p> <p><b>主题讨论专场：中德日老龄社会展望</b></p> <p><b>主持人：</b> Florian Kohlbacher 博士，德国日本研究所商业和经济学科负责人，日本</p> <p><b>发 言：</b></p> <ol style="list-style-type: none"> <li>1. 为健康老龄化社会早作准备，郑真真教授，中国社会科学院人口与劳动经济研究所，中国</li> <li>2. 人口变迁——对个体和社会的挑战，Ursula Lehr 教授，德国全国老年协会主席，德国</li> <li>3. 德国的幸福感：人口变迁的社会挑战，Clemens Tesch-Roemer 教授，德国老年学研究中心主任，德国</li> <li>4. 老龄化社会中失能的早发和晚发，Hiroko Akiyama 教授，东京大学，日本</li> </ol> <p><b>Paro 特别介绍和演示环节</b></p> <p>老龄社会的技术解决方案：照料机器人的案例</p> <p>发言：治疗型机器海豹 PARO——用于痴呆症护理的机能反馈疗法医疗设备，Takanori Shibata 教授，产业技术総合研究所，东京工业大学（AIST），日本</p>
19:30-21:00	<b>晚 宴</b>

10月24日（星期四），中冶大厦9层会议室（三元桥西北角）

9:00-9:15	<b>主题发言</b> 肖才伟，中国全国老龄委办公室副主任
9:15-10:45	<b>第一单元：个体研究（心理问题）</b>  <b>主持人：</b> Clemens Tesch-Roemer 教授 <b>发 言：</b> <ol style="list-style-type: none"> <li>1. 过去 20 年间稳定的中国老年人主观幸福感，韩布新教授，中国科学院心理研究所，中国</li> <li>2. 生命跨度中的幸福：德国的视角，Michael Eid 教授，柏林自由大学教育与心理学院，德国</li> <li>3. 中年后期和老年日本人的生产活动对幸福感的影响：两项追踪调查的纵向分析，Hiroshi Shibata 教授，人间総合科学大学 保健医学部，日本</li> </ol> <b>讨 论</b>
10:45-11:15	<b>茶 歇</b>
11:15-12:45	<b>第二单元：社会研究（社会学问题）</b>  <b>主持人：</b> Hiroko Akiyama 教授 <b>发 言：</b> <ol style="list-style-type: none"> <li>1. 中国的人口老龄化和卫生系统改革，左学金教授，上海社会科学院，中国</li> <li>2. 德国的老龄化、晚年生活和社会变迁，Andreas Motel-Klingebiel 博士，德国老年学研究中心，德国</li> <li>3. 生命历程中幸福感的性别差异：日本案例，Takako Sodei 教授，御茶水女子大学，日本</li> </ol> <b>讨 论</b>
12:45-14:00	<b>午 餐</b>

14:00-15:30	<p><b>第三单元：经济研究（经济和商业问题）</b></p> <p><b>主持人：</b>左学金教授</p> <p><b>发 言：</b></p> <ol style="list-style-type: none"> <li>1. 中国老龄化社会背景下新兴老龄产业发展展望，陆杰华教授，北京大学社会学系，中国</li> <li>2. 老龄化对欧洲经济的冲击及其对国际劳动力分工的潜在影响，Axel Boersch-Supan 教授，马普社会法律和社会政策研究所慕尼黑老龄经济学中心，德国</li> <li>3. 消费者晚年的幸福感：理论基础和实证分析，Florian Kohlbacher 博士，德国日本研究所，日本</li> </ol> <p><b>讨 论</b></p>
15:30-16:00	<b>茶 歇</b>
16:00-17:30	<p><b>第四单元：技术研究</b></p> <p><b>主持人：</b>Florian Kohlbacher 博士</p> <p><b>发 言：</b></p> <ol style="list-style-type: none"> <li>1. 香港长者科技接受行为研究——长者科技接受模型的应用，陈珂博士，香港城市大学系统工程与工程管理学系，中国</li> <li>2. 让祖母用养老机器人？德国老年人辅助技术发展的机遇和障碍，Birgid Eberhardt 博士，社会学研究和咨询研究所，德国</li> <li>3. 以健康老龄化为目标的老年科技学：从雪中送炭到锦上添花，Ryoko Fukuda 博士，庆应义塾大学环境情报研究部，日本</li> </ol> <p><b>讨 论</b></p>
18:30	<b>晚 宴</b>

**10月25日（星期五）**

9:00-10:30	<p><b>第五部分：积极规划老龄化社会的幸福感（政策问题）</b></p> <p><b>主持人：</b> Axel Boersch-Supan 教授</p> <p><b>发 言：</b></p> <ol style="list-style-type: none"> <li>1. 中国的老龄政策：从权益保障到全面发展，宋健教授，中国人民大学人口与发展中心，中国</li> <li>2. 促进德国积极老龄化的干预政策研究，Frank Berner 博士，德国老年学研究中心，德国</li> <li>3. 日本社会政策如何作用于老年人的幸福感？Takeo Ogawa 教授，熊本学园大学，日本</li> </ol> <p><b>讨 论</b></p>
10:30-11:00	<b>茶 歇</b>
11:00-12:30	<p><b>第六部分：讨论和总结</b></p> <p><b>主 题：</b> 未来的协作、研究、行动</p> <p><b>主持人：</b></p> <p>郑真真教授，中国社会科学院人口与劳动经济研究所，德国</p> <p>Florian Coulmas 教授，德国日本研究所所长，日本</p> <p><b>讨论者：</b> 全体</p>
12:45	<b>午 餐</b>
14:00-17:00	<b>现场考察：</b> 访问中益老龄事业发展中心

## ABSTRACTS

**DAY 1: WEDNESDAY, OCTOBER 23**

### **Welcome and Keynote Panel**

#### **Well-being in Ageing Societies: Perspectives from China, Germany and Japan**

**Florian Coulmas** (German Institute for Japanese Studies (DIJ) Tokyo)

Three countries, three socio-political systems, one challenge: To secure a satisfactory level of well-being under conditions of population ageing. We have here two medium-sized countries, Japan and Germany, and the most populous country in the world, China. We have Germany as a European early industrializer, Japan as the model catch-up nation that led the way of East Asia's 'flying gees', and we have the present-day economic growth champion, China, that its leaders until recently described as a developing country. Two of our three countries are highly urbanized, while one is still largely rural. Three different economic systems that have been characterized as social market economy, corporate capitalism and state capitalism differ from each other, as do the systems and levels of social welfare provisions in the three countries. Yet, the population dynamics of the three countries exhibit certain parallels. This in itself is a matter of great interest, for we cannot but notice that the two East Asian countries one of which for a long time had a much more invasive population policy than the other converge if we look at the birth rate development which, moreover, shows the same tendency in the third, European, country of our comparison. Further, medical and hygienic progress has led to remarkable life-expectancy gains in all three countries. While this is an undeniable success, the rapid transformation of the population structure brought about by ageing in conjunction with low fertility brings in its wake unprecedented challenges for the societies and governments concerned. Since these challenges are genuinely new in the history of humanity, it is prudent to try to understand these developments by comparing even very diverse countries, because different settings give rise to different innovations and solutions to problems. Intellectual exchange about these matters can only be beneficial. It from this point of view that this international workshop is convened.



## **Preparing for an ageing society**

**Zhenzhen Zheng** (Institute of Population and Labor Economics, CASS)

China has completed demographic transition and entered the era of population ageing. The number of elderly persons will increase dramatically in the next two to three decades. As the decline of mortality in the 1950s-60s and the decline of fertility since the 1970s went ahead of China's economic development, the current challenges resulting from demographic changes are also going ahead of economic development, and will have stronger impacts. The impact of population ageing will relate to all aspects in society and all persons in the society, therefore it is not only issues of elderly care and about elderly people. Response to population ageing should consider strategy comprehensively, consider relationships between elderly persons and other age groups, as well as harmonious between population and social-economic development. Preparing for an ageing society is not only responsibility of the state, regional government, community, family, and individual also need to build capacity. Resources need to be mobilized from government, civil societies, and private sectors. The society has to adjust and change in culture and traditional practice to an ageing society. China should learn experiences and lessons from countries that already "old," to prepare as soon as possible for a healthy and harmonious ageing society.

## **The demographic change – a challenge for the individual and the society**

**Ursula Lehr** (Department of Gerontology, University Heidelberg)

We are living in an aging world. Never before in Germany, in Europe, in the whole world so many people could reach such an advanced age. This is due to the improvement of the socio-economic living conditions and the progress of modern medicine, - and it is also influenced by the life style: physical, mental and social activity are a prerequisite for healthy ageing. It is not only important to add years to life, but also to add life to years. Aging has many different faces. Aging itself is not only a biological process, but it is a process determined by a number of biological, social and ecological factors. There is very often a great difference between people of the same chronological age. Scientists of all disciplines and Politicians have to discuss the question of longevity combined with a state of psycho-physical wellbeing. What can be done to assure a healthy aging? What can be done to assure the quality of life in old age? What can be done to prevent illness, diseases and dependency in old age? Old age, longevity, should not be seen as a problem but as a chance and challenge - a challenge for everyone: for the aging individual, for his/her family and for our society. We should not only ask for the problems and deficits of ageing and old age. We have to ask for - and we have to open our eyes for- the new potentials of the aged, also for the competences and new potentials of the very old persons. We have to see the aged as human capital.

## **Happiness in Germany: Challenges for a Demographically Changing Society**

**Clemens Tesch-Römer** (German Center of Gerontology, Berlin)

The German population grows older, declines in size and, due to immigration, becomes more diverse. Several trends within Germany's demographic change are notable: The number and proportion of children decreases, the number and proportion of very old people (80+ years) increases, and the workforce in Germany grows older (there is a shift from younger/middle aged workers to older workers. These changes demand adequate policies (e.g. support for families with young children, promotion of older workers productivity and innovation, increase of retirement age, and adequate health and social services). After describing demographic changes and policy responses, it will be discussed if (and how) these phenomena affect wellbeing and happiness in Germany.

## **Early- and Late-onsets of Disability in Aged Society**

**Hiroko Akiyama** (Institute of Gerontology, University of Tokyo)

Life expectancy has been steadily increasing across societies. A primary goal of gerontological research is now to prolong 'healthy life' in old age. The data from two large national panel surveys: Well-being of Japanese Elderly(Japan) and Health and Retirement Study (US) indicate primarily two patterns of health trajectories for American and Japanese men and women. Across all groups, early-onset and late-onset of disability groups were identified. The proportion of each group, the average age of disability onset, and the increasing tempo of disability over time are slightly different by gender and country. In Japan, approximately 20 percents of men and 10 percents of women experienced early-onset of disability, largely due to cardiovascular diseases, and died relatively quickly before age 70. Seventy percents of men and 90 percents of women (i.e., a majority of 80 percents of the Japanese elderly), reported late-onset (around age 75) of disability which turns up as difficulty with walking. The late-onset of disability is mainly caused by the loss of muscle mass and bone density. The early- and late-onset of disability are called Metabolic Syndromes and Locomotive Syndromes, respectively. Metabolic Syndromes has been the focus of gerontology/geriatric research for the past decades. By 2030, the population aged 75+ is expected to double in number and account for 20% of the Japanese population. Disability free independent life is not only essential for maintaining the quality of life for individuals but also helps increase human resources and contain health care costs for the society. Prevention of Locomotive Syndromes which further delays the onset of disability (desirably 5 more years) will be one of top priority issues in the highly aged society.

## **Therapeutic Seal Robot, PARO, as Biofeedback Medical Device in Dementia Care**

**Takanori Shibata** (Human-Life Technology Research Institute, National Institute of Advanced Industrial, Science and Technology (AIST))

Robot therapy, which uses robots as a substitution for animals in “animal therapy,” is a new robot application in the fields of welfare and patient care. The seal robot PARO began development for robot therapy in 1993. PARO was commercialized in Japan in 2005 and in Europe and the U.S. in 2009, and it has been used in hospitals and care facilities in approximately 30 countries. Recent research has revealed that robot therapy has a similar effect on patients as animal therapy. In 2009, the U.S. Food and Drug Administration (FDA) certified PARO as a “bio-feedback medical device.” While PARO can be used in various kinds of therapy similar to real animals, this presentation focuses on its use with elderly dementia patients because explicit differences can be easily observed before and after interacting with PARO. First, the purposes and functions of PARO will be explained. Second, because there are several observational studies on the therapeutic effects of the elderly with dementia interacting with PARO, some typical cases and interesting special cases will be introduced. These cases include recovery from depression, reduction of agitation, and recovery from speech disorders. Finally, reasons why PARO has the potential to change moods and behaviors of the elderly with dementia as a non-pharmacological approach will be discussed.

## **Session I: The Individual (Psychological issues)**

### **Stable subjective well-being of the Chinese elderly in the past 20 years**

**Buxin Han** (Institute of Psychology, Chinese Academy of Sciences)

**Aim:** To explore the subjective well-being (SWB) of Chinese elderly in the process of social and economic reformation in China.

**Method:** Revised and standardized Chinese version (Zhou, 1990) of Memorial University of Newfoundland Scale (MUNSH, 24 items, Kozma & Stones, 1980) has been used quite often to explore the SWB of Chinese. The score of MUNSH were calculated by sum of positive affection (PA) and positive experience (PE) minus the sum of the negative affection (NA) and negative experience (NE). 35 studies, published within the 1993-2010 with 17230 participants involved, were recruited for a cross-temporal meta-analysis.

**Results:** (1) There were no significant correlation between the year and either mean weighted scores from studies in each year ( $r = -0.183$ ,  $p > 0.05$ ) or the mean SD ( $r = -0.006$ ,  $p > 0.05$ ). (2) Negative experience and negative affection were increasing slightly but significantly during the period, and correlated with the year significantly. (3) There is no significant correlation between the sum score and social economic index, such as health insurance, social welfare. However, negative affection and experience are correlated with several social economic variables.

**Conclusion:** SWB of Elderly Chinese are stable within the past 20 years, in spite of the increasing negative affection and experience in the period. The concern for old age support in four-two-one families, consisting of four grandparents, two parents and one only child, arise with the increase in the numbers of only child. In this paper, with life table data and probability theory, we find that, when the four grandparents enter all old age stage (over 60 years old), the probability that they four all survive is only 0.61. They four coexist for 16 years after the birth of their grandchild, then one dies and the rest three spend another 8 years together, after another dies, the surviving two coexist another 5 years. The pressure of old age support in such families is not as severe as expected.

## **Well-being across the life-span: The German perspective**

**Michael Eid** (Freie Universität, Berlin)

The talk gives an overview of well-being across the life-span in Germany. The basic concepts of subjective and psychological well-being are defined. Recent results of representative panel studies are reported and conditions and determinants of individual differences in well-being are reviewed. Some desiderata for future research are delineated, in particular with respect to cross-cultural studies comparing China, Japan and Germany.

## **Determinants and effects on well-beings of productive activities in late-middle aged and aged Japanese: Longitudinal analysis of two representative panels**

**Hiroshi Shibata** (Department of Health Sciences, University of Human Arts and Sciences)

The present study aimed at identifying determinants and effects on well-beings of productive activities in late-middle-aged and aged Japanese. Two representative panels (J-HRS aged 55 – 64 years and J-AHEAD aged 70 years and over) were utilized for longitudinal analysis. Paid labor in both sexes and unpaid labor at home in woman tended to decrease over time. In both sexes, an inverse correlation was found between longitudinal changes of paid labor and other categories of productive activities. Age (inversely), and being self-employed or family members employed (directly) significantly related to longitudinal changes of paid labor. Education had a significantly direct relation to volunteer work in men alone. Depressive symptoms were likely to be attenuated by paid labor in men and unpaid labor at home in women. Total amount of time for all productive activities had significantly favorable effects on outcomes of ADL and cognitive ability, and survivorship. These relationships were U-shaped with most favorable effects found at eight hours a day.

## **China's population aging and health system reform**

**Xuejin Zuo** (Shanghai Academy of Social Sciences, China)

China's population aging and rapid change in living style has resulted in "epidemiologic transition" in both urban and rural areas. To promote public health and to control the non-commutable chronic diseases, China's health system will face many new challenges. Further reform measures should be taken to reduce the price distortion and the induced over prescription of drugs and high-tech check ups, and to allocate more resources and be more efficient in providing preventive care.

## **Ageing, Later Life and Social Change in Germany**

**Andreas Motel-Klingebiel** (Linköping University (Sweden) and German Centre of Gerontology, Berlin)

Demographic change runs parallel with transformations and transitions in several other societal spheres such as social security, the economy, work and employment, family, norms and values. These shifts impact individual life courses, create new risks for later life and bring new needs for protection against them, while at the same time they are drivers of social change. Variations in life courses concern the crucial social arenas of work and family and are related to changes in social structure as they differ e.g. by gender, class, region of residence and ethnicity. These changes will impact old age in a way that will challenge policy and social sciences as well as ageing individuals – with respect to objective and subjective quality of later life and its distribution, to generational equity and to social sustainability. At the same time, old age security systems are repeatedly reformed to decrease burdens for the economy, to guarantee financial feasibility and burden sharing between age groups and generation, incidentally pocketing decreasing levels of social security and increasing social inequality within cohorts and, hence, themselves creating new challenges for ageing and later life. This presentation will ask for specific transformations of ageing and later life as well as for the development of quality of life and its distribution under the conditions of social change in Germany. The presentation will also outline future transformations and intervention needs in the German and European context. These developments will be discussed theoretically as well as empirically applying data from the German Ageing Survey (DEAS) – an ongoing cohort sequential study of older people of age 40 to 85 in Germany.

## **Gender differences in well-being over the life course: a case in Japan**

**Takako Sodei** (Ochanomizu University, Tokyo)

Many people go through several critical stages of life. If they fail to overcome the crisis, their personal life as well as their family life are likely to be broken down. In Japan, probably in many other countries, the middle-age and the old age are two most critical stages of life. In the middle-age, both life satisfaction and marital satisfaction are rather low because people have to face ①financial difficulties in paying education expenses for children and repaying the mortgage, ② gap between husband and wife caused by lack of communication, which often results in so-called “mature-age divorce,” ③supporting both grown-up children and aging parents because of delaying independence of children and longevity of parents, which makes them difficult to plan for their own old age.

In old age, especially after the death of spouse, women face financial difficulty and men face social isolation. In the gender role segregated society like Japan, there is a norm that women are at home while men are at work. Even if women work, they work for a short period of time with low wage, which makes their old-age pension very low. Typical Japanese employed men spend most of their time at work, and they have no place at home and in community. After retirement, they are likely to be isolated, which often cause “isolated death,” of which people are found dead after several days or weeks. In order to solve poverty of older women and social isolation of older men, changes in gender role segregated social structure and norms are necessary. Equality at workplace and establishment of work-life-balance will eventually solve such problems. The gender role segregated norm is deeply rooted in the patriarchal stem family system which China, Germany and Japan have the common tradition. It will be attained through socialization process from childhood.

### **Session III: The Economy (Economic and business issues)**

#### **An overlook at a booming mature industry in Chinese ageing society**

**Jiehua Lu** (Department of Sociology, Peking University)

In spite of the majority of opinions from scientific community that there are major negative effects of Chinese ageing society on future socio-economic development, this paper turns out that there are also some positive impacts of Chinese ageing society on its business opportunities at present and in near future. This paper first introduces the concept of mature industry and its priority areas, then quantitatively measures significance of the booming industry in terms of whole economic growth, and finally proposes some policy frameworks in order to promote the healthy development of this newly-emerging industry in China.

#### **The Impact of Aging on the European Economy and its Implications for the International Division of Labor**

**Axel H. Börsch-Supan** (Munich Center for the Economics of Aging (MEA), Munich (Germany) and National Bureau of Economic Research (NBER), Cambridge (USA))

The expected change in the age structure in virtually all industrialized countries – but also in many developing countries – is dramatic and will lead to a substantially higher proportion of older people in the world. While aging is global, there are marked international differences in the speed and the extent of the aging processes. Even within the industrialized countries, differences are large. Europe and Japan have already a much older population than North-America. Italy and Germany are aging faster than France and Great Britain. In Asia, some countries start from a relatively young population, but aging is very quick. A particular dramatic example is China. Due to the globalization of our economies, aging will change the international division of labor. This offers chances and poses challenges. They are complex, underresearched and are the focus of this presentation. International flows of capital, goods and services, and labor – in descending order of mobility – will be important mechanisms moderating the effects of population aging in each individual country. Moreover, the different extent and speed of demographic change will affect the wealth of nations differently. Which countries will gain, which countries will loose in the international pecking order? Equally important is the question how these gains



and losses can be influenced by public policy. With these two core questions in mind, we (1) describe the international differences in the challenges and chances due to global aging, (2) juxtapose them to the existing and the planned policy environment, which adds another component of international differences, and (3) work out what this means in terms of the international growth prospects. The presentation will take a European point of view, focusing on the global interaction in the power triangle consisting of Europe, North America and the quickly growing Asian markets.

## **Consumer Well-being in Later Life: Conceptual Foundations and Preliminary Empirical Evidence**

**Florian Kohlbacher** (German Institute for Japanese Studies (DIJ) Tokyo)

Despite the growing importance of the 50+ age group in the population, older consumers are still under-researched and still often not included in a range of marketing practices. Besides, the vast majority of the research on older consumers published so far has been conducted in North America and Europe, while Japan – the country most severely affected by the demographic shift with both a rapidly aging and shrinking population – has been widely neglected. Understanding older consumers via academic, empirical research will help marketers and companies to become able to better cater to the individual needs of older consumers with innovative products and services. This is not only expected to increase business opportunities but more importantly contributes to the well-being of the fastest growing age group in the world. Therefore, it is necessary to explicitly study the well-being of older consumers in a business context and research has begun to discuss this issue both directly and indirectly in terms of how new products and services can contribute to the quality of life of older consumers. In gerontology, the well-being of older people is one of the most studied areas and thus there is much to learn for marketing scholars from gerontologists. This presentation is going to introduce the concept of consumer well-being, discuss its theoretical foundations and offer some preliminary empirical findings.

## **Session IV: Technology**

### **Understanding Gerontechnology Acceptance by Elderly Hong Kong Chinese: A Senior Technology Acceptance Model**

**Ke Chen; Alan Hoi Shou Chan** (Department of Systems Engineering and Engineering Management, City University of Hong Kong, China)

Technology develops in a tremendous speed and its impacts are immense to our daily life. However, studies have found that older adults were less likely to use technologies than younger people. The aim of this study was to examine the factors which influence the acceptance and non-acceptance of gerontechnology by older adults in Hong Kong. In order to investigate and explain technology acceptance by older Hong Kong Chinese, a Senior Technology Acceptance Model (STAM) was developed and empirically tested in this study. The proposed model integrates conventional TAM-constructs (perceived usefulness, perceived ease of use, self-efficacy, anxiety, and facilitating conditions) and age-related health and ability characteristics. A face to face interview technique with a preset questionnaire was employed for data collection. A sample of 1012 seniors aged 55 and over participated in the study. Results The STAM was strongly supported by the quantitative data in this study. In the STAM, personal attributes and environmental supports were more decisive than perceived benefits for predicting gerontechnology usage behavior. For older adults, individual attributes, like age, gender, education, and health and ability characteristics (such as functional abilities, cognitive abilities, attitude to ageing and life satisfaction) explicitly and directly affect technology acceptance behavior. There is a need for gerontechnology interface designers to accommodate the physical, cognitive, and emotional needs of older users. Government and related agencies or organizations could provide more resources and introduce some measures or policies to encourage and support individual older people to engage in technology usage activities.

## **A Robot for my Grandma? Opportunities and Barriers of Assistive Technologies for the Elderly in Germany**

**Sibylle Meyer & Birgid Eberhardt** (Institute for Social Research and Consulting, Berlin)

Demographic change has a lasting impact on European societies. In 2035 more than half of the German population will be over the age of 50, and every third person older than 60. An aging population is indeed open to a wealth of options for an individual lifestyle, but one must also consider the possibility of needing assistance or long-term care. In this regard, the key question is whether assistive technologies and technology-based services can reduce the gap between a gradually aging and an increasingly needy population, a declining labour force, and an expected shortage of care workers. Since the early 2000s more than 100 institutions, from both industry and the sciences, have been working on a future model of assistive technologies and robotic helpers for an aging society in Germany. Can they support an independent lifestyle for the elderly, relieve relatives of their worries, and provide ways to meet the challenges related to demographic changes? One of the main barriers of these models is the relatively low technology acceptance in Germany. Germans in general are relatively critical to innovation in everyday life, much more critical than Asian populations. Therefore the question which has to be addressed is, how can technological solutions be designed to induce a certain degree of acceptance by the elderly and willingness to pay for these innovations? Will the elderly, their relatives, and their nursing caretakers react to autonomous, intelligently functioning technical systems or will they reject living with an assistant that acts independently? The presentation will introduce to these research projects a focus on empirical studies about technology acceptance of the elderly, their relatives and professional careers.

## **Gerontechnology for successful aging: From compensation to enhancement**

**Ryoko Fukuda** (Graduate School of Media and Governance, Keio University, Japan)

Gerontechnology, the study of technology and aging for the improvement of the daily functioning of the elderly, covers very wide areas of research. It clarifies the characteristics of older adults and the difficulties derived from these characteristics, in order to consider the decline in functions experienced by older adults. Based on data, products aimed at older adults compensate for age-related declines and abilities and enhance the functions of older adults. Technologies and training that prevent age-related declines in functioning are also

investigated. For the elderly whose functions have unfortunately declined and become impaired to the extent that some care is required, support technologies both for care-receivers and care-givers should be provided. In addition to the conventional approach which aims to compensate the decline in functions, a new approach which enhances functions of older adults is required to contribute to active ageing. For that, influence of use of technology on daily lives of older adults should be investigated from several perspectives. One of our empirical study has shown that technological products could have positive influences, not only on daily activities of older adults, but also their emotion and willingness to use technology during four-week experimental period. In the session, it will be discussed how technology can enrich daily lives of older adults and how such technology can be implemented.

## FRIDAY, OCTOBER 25

### **Session V: Actively designing Well-being in Ageing Societies (Policy issues)**

#### **Aging Policies in China: from “rights protection” to “integrated development”**

**Jian Song** (Population and Development Center, Renmin University, China)

China has the largest elderly population in the world as well as longstanding culture of respecting and supporting for the aged, which both challenges and guarantees the formulation and implementation of aging policies. Currently Chinese government has developed a preliminary policy and legal framework in response to rapid and severe population aging, especially in accordance with the requirements of the ICPD Program of Action. Aiming at satisfying three-layer needs of the elderly: financial support, daily assistance and spiritual comfort and paying attention to varied priorities of the elderly at different ages and who live in rural or urban areas, a series of aging-related policy documents released by the government covers old-age security, medical care, old-age service, culture and education, and social participation. The principal aging policies in China and multifaceted progresses made in enhancing wellbeing of the elderly will be introduced briefly.

Seen from longitudinal perspective, aging policies in China process along the road from focusing on rights protection of the elderly to putting more emphasis on their

integrated development, which are in accordance with the transition from healthy ageing (to spend one's late life without illness and pain) to active aging (to enjoy one's late life in the most suitable way). Seen from life course perspective, the younger old are encouraged to participate in the society and spend their third age actively and happily; the older old are able to live longer time independently in their own house with their families, with pensions or the minimum living security program as the financial guarantee, all kinds of medical and social services as daily living assistance and comprehensive activities as spiritual incentives besides the families' support. All the above is where ageing policies come in to play.

## **Policy interventions to enhance active ageing in Germany**

**Frank Berner** (German Center of Gerontology, Berlin, Germany)

Active ageing, wellbeing and the quality of life in old age are influenced by policy measures taken in many policy fields. When considering policies with an effect on old age, it is useful to distinguish between policies that shape the institutional and structural context for the individual development throughout the life course, on the one hand, and policies addressing older people in particular, on the other hand. As to the first category, international comparison indicates that a higher level of public expenditure, more redistribution and a lower degree of social inequality correlate with a higher level of quality of life in old age. Especially educational policy has an important impact: There is much empirical evidence for the positive effects of education, even in early childhood, on health, social integration, and activity in old age. Policy measures can also directly be aimed at changing older peoples' behavior or the social contexts older people live in. In Germany, there are educational programs, health-related interventions, and policies to enhance social participation, all addressing older people in particular. The presentation will describe some of these policies and explore their possibilities and their limitations.

## **How Did Japanese Social Policies Effect on Well-being for Older Persons?**

**Takeo Ogawa** (Kumamoto Gakuen University)

Japan has exhausted its demographic bonus already, and will endure the demographic onus in long period. Under the Basic Act on Measures for the Aging Society, Japanese government legislated many acts and programs during 2000-2010. Policies of "Work and Income", "Health and Welfare", "Learning & Participation", and "Life Environment" are

challenged. Then, how did Japanese social policies effect on well-being for older persons? The effect of social policies should be evaluated in a decade.

The well-being is defined as the fullness sense of life, the satisfaction, worry/anxiety about latter life & health. During 2000-2010 the decade after 2000, Active-aging policy and long-term care insurance system is promoted as priority measures. Its effects will be evaluated in public statistic data: “Census”, “Opinion Poll”, “Survey on Time Use & Leisure Activities”, and “Annual Report of All-Japan Federation of National Health Insurance Organizations”. Work-activation-policies were not realized on the well-being of work/Income. The Public Long-term Care Insurance system has enhanced the well-being of longevity. The volunteerism did not effect on the well-being of older persons sufficiently. But volunteerism for children was enforced by older persons. In spite of these results, the fullness sense of life is increasing during 2000-2010. Current older persons are enjoying their life with governmental support system, although they have still worry and anxiety toward latter life. The remained agenda is the inter-generational relationship. Japanese government is asked for harmonizing inter-generational equity. Japanese government has challenged social policies for older persons. However, the aged society is not only problematic for older persons but also for all-generations. Japanese government will have to shift its target from older persons to younger persons immediately.

## 论文摘要

10月23日（星期三）

### 老龄化社会的幸福感：中、德、日的视角

Florian Coulmas（德国日本研究所，东京）

三个国家，三种社会政治制度，面临同一个挑战：在老龄化条件下确保令人满意的幸福感水平。日本和德国是中等大小的国家，而中国是世界上人口最多的国家。德国是欧洲早期工业化国家的代表，日本是典型的追赶国家，曾带领东亚经济腾飞，而近年来中国经济增长桂冠全球，尽管直到最近中国领导人仍自称为发展中国家。三国之中有两国已经高度城市化，而一国仍有大量的农村人口。三种不同的经济制度分别是社会主义市场经济体制、企业资本主义和国家资本主义，三国社会福利的体制和水平也不相同。然而，三国的人口动态发展都呈现某些类似的趋势，这本身就是非常值得关注的。因为，尽管其中之一曾长期实行非常强而有力的人口政策，两个东亚国家的生育率变化相似，且与第三个来自欧洲的国家趋势相同。此外，在这三个国家中，医疗和卫生水平的进步都曾带来预期寿命显著的增加。尽管这是不可否认的成功，但老龄化和低生育率引发的人口年龄结构快速变化带来了史无前例的挑战，使社会和政府感到忧虑。由于这些挑战在人类历史中没有先例，要把握其变化发展的规律，比较非常相异的国家是一种明智的方式，因为不同环境会引发不同的革新和问题的解决方法。知识交流只会带来益处。这正是本次国际研讨会的初衷。

### 为健康老龄化社会早作准备

郑真真（中国社会科学院人口与劳动经济研究所）

中国在本世纪初已经完成了人口转变过程，正在进入快速的人口老龄化阶段，在未来的二、三十年间，老年人口数量将迅速增长，逐渐形成有史以来老年人口比例最高的阶段。尽管都面临人口老龄化的挑战，中国的情况与发达国家有所不同。中国人口在20世纪50-60年代的死亡率降低和70年代以来的生育率下降都超前于经济发展，因而当前的人口老龄化也是超前于经济发展的，即具有“未富先老”的特点。相对快速的人口变化所带来的影响也更为集中、更为强烈。人口老龄化会影响到社会的方方面面以及在这个社会生活的所有人。应对老龄化不仅是养老问题和老年人的问题，而需要统筹考虑应对老龄化战略与人口政策问题，老年人和其他年龄人群的关系。

系，以及人口与社会经济的协调发展。应对人口老龄化挑战不仅仅是国家的责任，而需要从国家、地方、社区、家庭及个人多层次增强应对老龄化的能力，需要调动政府、民间社团和私营机构等各方面的资源，还需要全社会在文化和传统习俗方面有相应的调整 and 改变。面对未来挑战，中国应向“先老”的国家学习经验、汲取教训，为建立健康和谐的老龄化社会早作准备。

## 人口变迁——对个体和社会的挑战

Ursula Lehr（德国全国老年协会）

我们生活在一个老龄化的世界。在德国、欧洲以及全世界范围中，从未有这么多人能达到如此高龄。这是因为社会经济生活条件的改善和现代医学的进步，同时也受到生活方式的影响，身体、心理和社会活动均为健康老龄化的前提条件。重要的不仅仅是寿命的延长，同样要提高老年人的生活能力。老化有很多不同的层面。老化本身不仅是一个生物过程，而是由一系列生物、社会和生态因素决定的过程。同龄人之间往往有很大的差别。所有学科的科学家和政治家结合心理和身体健康的状态来讨论长寿的问题。我们能做些什么以确保健康的老龄化？我们能做些什么以保证老年的生活质量？我们能做些什么以防止老年的体弱、疾病和依赖？高龄与长寿，不应被视为问题，而是机会和挑战——是每个人都面临的挑战：不管是对老年人本身，他们的家庭还是整个社会。我们不仅要为老龄化和老年带来的社会问题 and 经济赤字探寻答案，还要开阔视野，探寻老年人中新涌现的潜力，也包括高龄老人的能力和新潜力。我们应把老年人视为人力资本。

## 德国的幸福感：人口变迁的社会挑战

Clemens Tesch-Roemer（德国老年学研究中心，柏林）

德国人口日益老化，总量减少，并且在移民的作用下更为多元。德国人口变迁过程中有以下值得关注的趋势：儿童的数量和比例都在降低；高龄老年人（80 岁以上）的数量和比例都在增加；德国劳动力人口也在老化（劳动者年龄有从青年、中年往更高年龄转移的趋势）。这些变化需要足够的政策来应对（例如：扶持有低龄儿童的家庭、提升老年劳动者工作效率和创造性、推迟退休年龄以及充分的健康和社会服务）。基于对人口转变 and 对策的描述，本研究将探讨这些现象是否以及如何影响德国的福利和幸福感。



## 老龄化社会中失能的早发和晚发

Hiroko Akiyama ( 东京大学高龄社会総合研究機構 )

不同社会的人口预期寿命持续增加。老年学研究的一个主要目标是如何延长晚年的“健康寿命”。本研究数据来源于两项大型全国性追踪调查：日本老年人幸福感调查（日本）和健康与退休研究（美国），研究结果显示，美国和日本的男性和女性的健康变化轨迹是两种类型。在所有群体中，失能群体的早发和晚发都被分了类。每个群体的比例、失能发生的平均年龄、失能随时间发展的速度在不同的性别和国家有轻微差异。在日本，约 20% 的男性和 10% 的女性出现了早发性的失能，主要原因是心脑血管疾病，相对快地死于 70 周岁之前。70% 的男性和 90% 的女性（即 80% 多数的日本老年人）报告了出现行走困难的晚发性失能（75 岁左右）。晚发的失能主要由肌肉质量和骨密度下降所导致。早发和晚发的失能分别被称为代谢综合症和运动官能综合症。代谢综合症是过去十年间老年学和老年医学研究的焦点。至 2030 年，日本 75 岁以上的人口数量将增加一倍，占日本总人口的 20%。无残疾能自理不仅是维持个体生活质量的根本，也能为社会增加人力资源和控制医疗支出。预防运动官能综合症能够进一步延迟失能的发生（预期达到 5 年以上），将成为重度老龄社会最重要的课题之一。

## 治疗型机器海豹 PARO：护理痴呆症的机能反馈疗法医疗设备

Takanori Shibata ( 産業技術総合研究所，東京工業大学 (AIST) )

机器人疗法以机器人取代“动物疗法”中的动物，是机器人在福利和病人护理领域的新应用。机器海豹 PARO 在 1993 年以机器人疗法为目的开始开发。PARO 在 2005 年投放日本市场，并在 2009 年进入欧洲和美国市场，目前已用于约 30 个国家的医院和护理机构。近年研究显示机器人疗法对病人的疗效与动物疗法类似。2009 年，美国食品和药物管理局（FDA）把 PARO 作为技能反馈医疗设备进行了认证。PARO 与真实的动物一样，能用于不同类型的治疗，本报告主要关注它用于老年痴呆症病人，因为很容易观察到在与 PARO 互动前后的显著差异。首先，将说明 PARO 的用途和功能。其次，基于数个研究老年痴呆患者与 PARO 互动疗效的观察性试验，介绍一些典型案例和特殊案例，包括抑郁症的康复、缓解焦虑和语言障碍的康复。最后，将讨论 PARO 作为非药物方法为何具有改变痴呆症老人情绪和行为的能力。

10月24日（星期四）

## 第一单元：个体研究（心理问题）

### 过去 20 年间稳定的中国老年人主观幸福感

韩布新（中国科学院心理研究所）

目的：研究在中国社会和经济改革过程中中国老年人主观幸福感。

方法：修正和标准化的中文版的（周建初，1990）纽芬兰纪念大学幸福度量表（MUNSH, 24 items, Kozma & Stones, 1980）经常被用来研究中国人的主观幸福感。MUNSH 分数由正性情感（PA）和正性体验（PE）的分数和，减去负性情感（NA）和负性体验（NE）的分数和。本研究综合 1993-2010 年发表的 35 项研究，共涉及 17230 名被试，进行截断历史元分析。

结果：（1）年份和各年加权平均分数（ $r = -0.183$ ,  $p > 0.05$ ）、年份与平均标准差（ $r = -0.006$ ,  $p > 0.05$ ）均无显著相关性。（2）负性体验和负性情感在研究期间呈现略有下降但具有统计学意义，并且与年份显著相关。（3）总分与医疗保险、社会福利等社会经济指标相关性不显著。然而，负性情感和负性体验与数项社会经济变量存在相关性。

结论：中国老年人主观幸福感在过去的二十年间总体保持稳定，其中负性情感和负性体验在此其间有所增加。随着独生子女数量的增多，“四二一”家庭结构带来的家庭养老压力日益引起了关注。本文使用生命表数据和概率理论，测度“四二一”家庭形成之后的祖辈四人共同存活的概率和存活年限。研究发现，在祖辈四人进入老年阶段（60 岁）时，都存活的概率只有 0.61。“四二一”家庭形成之后祖辈四人共同存活 16 年，一人死亡然后三位老人共同存活 8 年，再一人死亡之后两位老人共同存活 5 年。“四二一”家庭的养老压力并不像所担忧的那么严重。

### 生命跨度中的幸福：德国的视角

Michael Eid（柏林自由大学教育与心理学院）

报告将概述德国生命跨度中的幸福，定义主观幸福和精神幸福的基本概念，介绍近年有代表性的追踪研究，回顾幸福感个体差异的条件和决定因素。报告将讨论亟需进一步研究的方向，特别是对中、日、德进行比较的跨文化研究。

## 中年后期和老年日本人的生产活动对幸福感的影响：两项追踪调查的纵向分析

Hiroshi Shibata (人間総合科学大学)

本研究目的是识别出中年后期和老年日本人的生产活动对幸福感的影响因素和影响力。纵向分析使用的是两项有代表性的追踪调查（年龄在 55-64 岁的 J-HRS 和年龄在 70 岁及以上的 J-AHEAD）。男女性的有酬劳动者和无酬从事家庭劳务的女性都随年龄增加而减少。对男女两性来说，有酬劳动者与其他类型生产劳动的纵向变化呈负相关。年龄（反向关系）、个体经营者或被家庭成员雇佣（正向）与有酬劳动随时间的变化显著相关。对男性来说，教育与志愿工作有显著的正向相关性。男性中有酬劳动者和女性中无酬家务劳动可能会减少抑郁的症状。所有生产活动的总量对 ADL、认知能力和存活率显著有利，前者与后者的关系都呈 U 型，最佳效果位于每天八小时工作时间处。

### 第二单元：社会研究（社会学问题）

## 中国的人口老龄化和卫生系统改革

左学金（上海社会科学院）

中国的人口老龄化和生活方式的迅速变化已导致中国城乡的“疾病谱转变”。为了促进公众健康，有效地控制慢性非传染性疾病，中国的医疗卫生系统将面临许多新的挑战。需要通过深化改革来减少卫生系统的价格扭曲及其诱致的过度用药和高科技检查等问题，以期将更多的资源更有效地用于预防性服务。

## 德国的老龄化、晚年生活和社会变迁

Andreas Motel-Klingebiel (瑞士林雪平大学, 德国老年学研究中心)

人口变迁与多种社会领域的转换和改变同时发生, 例如社会保障、经济发展、工作和就业、家庭、社会规范和价值观。这些变化影响个体的生命历程, 给晚年生活造成新的风险, 也给风险保障提出了更高要求。而与此同时这些都是社会变迁的驱动力。生命历程的变化涉及工作和家庭这些关键的社会领域, 并且与带来差异的社会结构如性别、阶层、居住地和种族的变化有关。这些变化将会对政策和社会科学研究以及老化个体——从客观和主观晚年生活质量和分布方面, 给代际公平和社会可持续发展带来挑战, 并通过这种方式影响老龄。同时, 养老保险体系反复进行改革, 以减轻对经济的负担、确保财务可行性和在不同年龄组和代际间分担压力。不确定的给付降低了社会保障的水平, 也增加了队列间的的社会不平等, 因而改革本身也对老龄化和晚年生活带来挑战。本研究将在德国社会变迁条件下探寻老化和晚年生活的具体转换方式, 探索如何提升生活质量及其分布情况。本研究还将强调未来在德国和欧洲方面进行改革和干预的必要性。这些研究将同时在理论和经验数据基础上开展, 数据来源于对德国 40-85 岁年龄人口持续进行的队列追踪研究——德国老龄化调查 (DEAS)。

## 生命历程中幸福感的性别差异：日本案例

Takako Sodei (御茶水女子大学)

许多人都会经历人生的各种关键阶段。如果他们无法度过危机, 他们个人的生活以及家庭生活都会受损。在日本、可能在许多其他国家中, 中年和老年是人生中最关键的阶段。在中年, 生活满意度和婚姻满意度都相对较低, 因为人们需要面对:

(1) 支付子女教育费用和偿还抵押贷款的经济压力; (2) 夫妻间由于缺乏沟通带来的隔阂, 很多情况下会演变成所谓的“中年离婚”; (3) 因为子女独立的推迟和父母的长寿, 既要供养成年子女又要赡养年老的双亲, 从而难以规划自己的老年生活。在老年阶段, 特别是在丧偶之后, 女性面临经济压力而男性面临社交孤立。在像日本这样性别角色隔离的社会里, 女性主掌家庭而男性工作是惯常的模式。即使女性参加工作, 她们只会以较低的工资工作较短的时期, 因而她们老年时领取的养老金非常低。而典型的日本从业男性把他们大多数的时间都投入到工作中, 在家庭和社区里没有他们的位置。在退休之后, 他们容易与世隔绝, 常常导致“隔绝的死亡”, 也就是在死亡数天乃至数周后才被人发现。为了解决老年女性的贫困和老年男性的社交孤立, 必须要改变性别角色隔离的社会结构和规范。职场平等和工作生活平衡能够最终解决上述问题。性别角色隔离源于男性主导的家庭体系, 中国、德国与日本在这一点上有共同的传统。这是从孩童时期开始的社会化进程中获得的。

### 第三单元：经济研究（经济和商业问题）

## 中国老龄化社会背景下新兴老龄产业发展展望

陆杰华（北京大学社会学系）

尽管学界的主流观点是中国老龄化社会对未来社会经济发展会带来不利的影响，本研究却证明中国老龄化社会在目前以及不远的未来也存在一些正向的商业机会的影响。本研究首先介绍老龄产业的概念及其优先发展的领域，而后定量地测算这一新兴产业对整体经济发展的重要程度，最后提出促进老龄产业作为中国新生产业健康发展的政策框架。

## 老龄化对欧洲经济的冲击及其对国际劳动力分工的潜在影响

Axel Boersch-Supan（马普社会法律和社会政策研究所慕尼黑老龄经济学中心）

事实上所有工业化国家和部分发展中国家都面临年龄结构的剧烈变化，将会导致全球老年人口占相当高的比例。尽管老龄化是全球性的，但老龄化进程的速度和程度仍然存在显著的国际差异。甚至在工业化国家内部，差别也是巨大的。相比北美，欧洲和日本的人口更为老化。意大利和德国老化速度快于法国和英国。在亚洲，一些国家虽然有着相对年轻的人口，老龄化却非常迅速。最极端的例子是中国。由于经济的全球化，老龄化将会改变国际劳动力分工，这带来了机会也提出了挑战。这些影响是复杂的且有待更充分的研究，这就是本研究的关注点。在跨国流动中，资本、商品和劳务的流动性是依次递减的，这将是缓解单个国家老龄化影响的重要机理。此外，人口变迁不同的水平和速度也会以不同的方式影响不同国家的财富。在国际新秩序中，哪些国家会获益，哪些国家会受到削弱呢？同样重要的是公共政策会如何影响这些获益和削弱？基于这两个核心问题，本研究将：（1）描述全球老龄化作用下机会和挑战在国家间的差异；（2）将这些国家置于现存和规划的政策环境中，构成了国家间差异的另一个来源；（3）测算这对国际增长前景的作用。报告以欧洲为出发点，关注由欧洲、北美和快速增长的亚洲市场组成的三极背景下全球的交互作用。

## 消费者晚年的幸福感：理论基础和实证分析

Florian Kohlbacher (德国日本研究所)

尽管 50 岁以上群体在整个人口中变得日益重要，但对老年消费者却鲜有研究，也没有涵盖在营销的范围内。此外，目前绝大多数已发表的关于老年消费者的研究都是在北美和欧洲进行的，而日本作为受快速老龄化和人口减少所带来的人口转变影响最严重的国家，却一直被忽视了。通过理论和实证研究认识老年消费者能帮助市场人士和企业以创新的商品和服务迎合老年消费者独特的需求。这不仅能增加商业机会，更重要的是有助于提高全球快速增长的老年群体的幸福感。因此，有必要在商业环境中详细研究老年消费者的幸福感。本研究从讨论新产品和服务对老年消费者生活质量的直接和间接帮助出发。老年人幸福感是老年学中研究集中的领域，因此市场学的学者需要多向老年学专家学习。报告将介绍消费者幸福感的概念，探讨其理论基础和展示一些初步的实证结果。

### 第四单元：技术研究

## 香港长者科技接受行为研究 – 长者科技接受模型的应用

陈珂、陈海寿 (香港城市大学系统工程与工程管理学系)

科技产品与服务对人们的日常生活带来了巨大的影响，然而长者与科技这一课题并未收到广泛关注。本项研究旨在以长者科技接受模型探讨影响香港长者使用日常科技产品与服务的因素。长者科技接受模型以科技接受模型为基础，引入了个人的健康与能力等因素。本文以问卷调查方式获得数据。1012 名年龄为 55 岁以上的香港长者参与了访问。结果发现，原始 TAM 中的有用性认知与易用性认知的影响并未如预期的显著，但是个人因素（年龄、性别、健康水平、认知能力、对年龄的态度与生活满意度）与外界促成因素对于科技的使用有显著影响。研究结果对与长者产品的设计以及推广政策的制订提供了启示。

## 让祖母用养老机器人？德国老年人辅助技术发展的机遇和障碍

Sibylle Meyer 和 Birgid Eberhardt (社会学研究和咨询研究所)

人口变迁给欧洲社会带来持续影响。到 2035 年，一半以上的德国人口将超过 50 岁，三分之一将超过 60 岁。人口老龄化确实为个人生活方式赋予了丰富的选择，但还必须考虑需要协助或长期护理的可能性。在这方面，关键的问题是辅助技术和技术为基础的服务是否可以减少逐渐老化、不断增加的有需要的人口与劳动力日益减少、预期的护理员短缺之间的差距。为应对德国的老龄化社会，从 21 世纪头几年开始，超过 100 个来自企业和研究界的机构致力于未来辅助技术和机器人助手的研发。这些技术能够帮助老年人独立生活，减轻亲属的苦恼，并成为应对人口变迁相关挑战的方式吗？这种模式应用的主要障碍之一是德国相对较低的技术接受度。德国人通常不容易接受日常生活中的创新，在这方面更甚于亚洲人。因此，需要解决的问题是，该如何设计技术解决方案，才能提高老年人的接受程度，让他们愿意为这些新技术付钱？老年人、他们的亲属和护理人员对自主的、智能化运行的技术装置的反应如何，或者说他们是否会拒绝同独立运行的机械助手共同生活？报告将为这些研究项目引入一种老年人、老年人亲属和专职护理人员技术接受度的经验研究方法。

## 以健康老龄化为目标的老年科技学：从雪中送炭到锦上添花

Ryoko Fukuda (庆应义塾大学环境情报研究部)

老年科技学是为了提高老年人日常活动机能，研究技术和老龄进程的学科，它涵盖很广泛的研究领域。它明确老年人的特征和这些特征带来的困难，以考察老年人身体机能的衰退。从数据来看，以老年人为目标群体的产品能够补偿与年龄相关联的能力衰退，增强老年人的身体机能。对预防年龄相关机能衰退的技术和训练也进行了研究。对那些机能不幸衰退和受损、需要照料的老年人来说，应该为照料接受者和照料实施者提供辅助的技术产品。在补偿身体机能衰退的传统方式之外，增强老年人机能的新方式还能有助于实现积极老龄化。为此，应该从以下几个方面研究技术在老年人日常生活的作用。我们所做的一项实证研究显示，在四周的实验时间内，科技产品对老年人日常活动以及他们的情感和使用科技的意愿都由正向的影响。在此次会议中，将对技术如何丰富老年人日常生活以及这些技术如何被实施进行探讨。

10月25日（星期五）

## 第五部分：积极规划老龄化社会的幸福感（政策问题）

### 中国的老龄政策：从权益保障到全面发展

宋健 (中国人民大学人口与发展研究中心)

中国拥有世界上最为庞大的老年人口规模，其尊老养老的文化传统也源远流长，这些对于老龄政策的制定和施行既提出了挑战，也提供了有利的文化基础。目前中国已经形成了初步的老龄政策体系框架，以应对日益严峻的人口老龄化形势，这些政策目标与国际人发大会行动纲领的要求相一致。基于满足老年人经济支持、生活照料和精神慰藉的三重需要，同时关注到不同年龄、不同地域老年人口的特殊需求，中国政府制定了涵盖养老保障、医疗保健、为老服务、老年文化教育和社会参与等一系列的政策措施。我们将简要介绍中国的主要老龄政策及其在促进老年人福利方面所发挥的作用。

从发展的视野来看，中国的老龄政策走过了从注重老年人权益保障到促进老年人全面发展的政策路径，这也正吻合从健康老龄化到积极老龄化的理念转变。从生命历程的视角来看，年轻老年人被鼓励积极参加社会活动，愉快地享受其第三龄；年长老人则能够尽可能长时期独立地与家人生活在自己的住所内，要实现这些，经济保障、医疗保健、社会服务和精神激励一样也不能少。而所有这一切，都离不开老龄政策的作用。

### 促进德国积极老龄化的干预政策研究

Frank Berner (德国老年学研究中心)

积极老龄化、老年幸福感和生活质量受很多政策领域政策评估方法的影响。区分下述两种类型有助于评估政策对老年的作用：一是形成生命历程中个体发展制度性和结构性框架的政策，其二是特别为老年人出台的政策。对于第一种类型，国际比较表明更高水平的公共支出、更多的再分配和更低水平的社会不平等与更高的老年生活质量相关联。教育政策的影响力尤其重要：大量经验证实教育对健康、社会融合和老年活跃程度的正向作用，甚至在童年早期的教育也是如此。德国目前有教育项目，健康相关的干预和提高社会参与度的政策，都局限于老年群体。报告将介绍部分政策，并探讨其可能作用和局限性。



## 日本社会政策如何作用于老年人的幸福感？

Takeo Ogawa (熊本学园大学)

日本的人口红利已经耗尽，并将在很长的时期内经历人口的负红利。根据《老龄化社会的基本措施法》的条款，日本政府在 2000-2010 年间制定了许多法律和方案。“工作和收入”、“健康和福利”、“学习和参与”、“生活环境”的政策受到了挑战。那么，日本社会政策如何影响老年人的幸福感呢？十年间社会政策的效果有待评估。

幸福感被定义为对生活的充实感、满足感、对未来生活和健康的担心和焦虑。在 2000 年之后 2000-2010 年这十年间，积极老龄化政策和长期护理保险体系被提升至优先措施。将使用以下公开统计数据来评估其效果：“普查”、“民意调查”、“时间利用和休闲活动调查”以及“全日本国民健康保险组织联合会年度报告”。工作激励政策对工作和收入的幸福感没有奏效。公共长期护理保险体系提高了长寿的幸福感。志愿者制度对老年人幸福感没有起到充分的作用。但儿童志愿者制度通过老年人得到了加强。在这些结果之外，生活充实感在 2000-2010 年间逐年升高。目前老年人对政府支持体系下的生活感到满意，尽管他们对晚年生活仍然存在担忧和焦虑。遗留的议程是如何处理代际关系。日本政府被要求协调代际公平。日本政府已经开始质疑为老年人出台的社会政策。然而，老龄化社会不仅是老年人的问题，也是所有代际的问题。日本政府将不得不尽快将关注重点从老年人转移到年轻的人群。

## Short bio of presenters

### **Hiroko Akiyama** (Institute of Gerontology, University of Tokyo)

Hiroko Akiyama, PhD., a social psychologist, is professor at the Institute of Gerontology, University of Tokyo and the former vice president of Science Council of Japan. Professor Akiyama has conducted a number of cross-national surveys and is widely recognized as an expert on issues of global aging. She is known for the long-running research on the elderly in Japan—tracking the aging patterns of approximately 6,000 Japanese elderly for more than 20 years. Recently she initiated social experiment projects that pioneer to re-design communities to meet the needs of the highly aged society and allow the elderly to successfully ‘age-in-place’. She formed an interdisciplinary gerontology program at University of Tokyo in 2006. Professor Akiyama received Ph.D. in psychology from University of Illinois, the United States.

### **Frank Berner** (German Center of Gerontology, Berlin, Germany)

Dr. Frank Berner, sociologist, is head of the department for policy consulting at the German Centre of Gerontology in Berlin. At the German Centre of Gerontology he is responsible for the office of the scientific commissions working out the regular government reports on older people in Germany. Before joining the German Centre of Gerontology in 2007, he was a member of the research project “The Regulatory Welfare State. State Regulation of Private and Occupational Pensions in Europe” at the University of Bielefeld (Germany). He holds a diploma in sociology and a PhD from the University of Bielefeld. In his PhD thesis he investigated the changing relation between public and private in German old-age security. His main research interests are: sociology of ageing, social policy, sociology of the welfare state, the life course, old-age pensions.

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Dr. Alan H.S. Chan was born in China. He obtained his B.Sc. in Industrial Engineering from the Hong Kong University, Hong Kong SAR in 1982. He then obtained his M.Phil. and Ph.D. in ergonomics and human factors studies from the Hong Kong University, Hong Kong SAR in 1985 and 1995 respectively. Dr Chan has a wide range of research interests in different areas of human factors including gerontechnology, work design, and human machine interfaces. He is a senior member of Institute of Industrial Engineer, Council Member of the Asian Council on Ergonomics and Design, the Hong Kong Ergonomics Society, Fellow of the Institution of Engineering and Technology, Institution of Ergonomics and Human Factors, and Hong Kong Institution of Engineers. He is a Chartered Engineer in the UK. He has published over 120 research papers, book chapters and technical reports.

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Florian Coulmas is Director of the German Institute for Japanese Studies, Tokyo. He has taught and done research in various environments, including The National Language Research Institute, Tokyo, Georgetown University, Washington, DC, USA, Chuo University, Tokyo and the Institute of East Asian Studies, Duisburg-Essen University. His numerous publications include more than a dozen monographs including *Population Decline and Ageing in Japan - The Social Consequences*, London: Routledge 2007; *The Demographic Challenge: A Handbook about Japan* (with Harald Conrad, Annette Schad-Seifert, Gabriele Vogt (eds.), Brill 2008); *Imploding Population in Japan and Germany* (with Ralph Lützel (eds.) Brill 2011). He is editor of *Contemporary Japan*, a peer-reviewed Japanese Studies journal published by Mouton deGruyter. His current research interests are about life-satisfaction in ageing and shrinking societies.

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Michael Eid is professor of psychology at the Freie Universität Berlin. His main research interests concern subjective well-being, the analysis of multitrait-multimethod data, longitudinal data analysis, structural equation modeling, and cross-cultural psychology. He is associate editor of the *Journal of Positive Psychology* and co-editor of the handbook *The science of subjective well-being*.

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Ryoko Fukuda received her Ph.D. from Graduate School of Media and Governance at Keio University in 1999 and Dr. rer. nat. (Doctor rerum naturalium) from Technische Universität München in 2004. She worked at Institute of Ergonomics at Technische Universität München and Faculty of Environment and Information Studies at Keio University. Currently she is project associate professor of Graduate School of Media and Governance at Keio University. Her research focuses on human factors approaches to aging and technology use including human computer interaction, visual information perception, use of home appliances, and influence of technology use on emotion. Recently she also works on expert performance and its visualization by using ITC in care giving and agriculture. She is executive board member of Japan chapter of International Society for Gerontechnology and Pan-Pacific Council on Ergonomics.

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Dr. Florian Kohlbacher is a senior research fellow and head of the Business & Economics Section at the German Institute for Japanese Studies (DIJ) Tokyo. His research focuses on the business implications of demographic change, particularly from a marketing and innovation management perspective. Dr. Kohlbacher is also a visiting Research Fellow at the Sloan Center on Aging & Work at Boston College, a Fellow of the World Demographic & Ageing Forum and an Advisor to the International Mature Marketing Network (IMMN). He is co-editor of *“The Silver Market Phenomenon: Marketing and Innovation in the Aging Society”*, 2nd edition 2011, Springer, as well as of the special issue *“The Ageing Workforce and HRM – Challenges, Chances, Perspectives”*, *International Journal of Human Resources Development and Management* 9(2/3), 2009.

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Ursula M. Lehr, born 1930 in Frankfurt/Main (Germany). Studies 1949-1954 University of Frankfurt/Main and Bonn in psychology and philosophy; 1954 Doctor of Philosophy, Assistant Professor, 1969 Associate Prof. at the Institute of Psychology, University of Bonn, 1972-1975 Full Professor of the University of Cologne, 1975-1986 Professor of Psychology and Director of the Department of Psychology, Univ. of Bonn; 1986-1998 Professor of Gerontology and Founding Director of the Institute of Gerontology of the University of Heidelberg; 1988-1991 Federal Minister of Youth, Family, Women and Health; 1990-1994 Member of the German Parliament (Deutscher Bundestag); since 2000 Prof. of the European University of Yuste/Spain, Chair Marie Curie. Since 2009 president of the BAGSO, the German National Association of Senior Citizens' Organizations. Many publications in Developmental Psychology, Life-Span-Psychology, Educational Psychology, Social Psychology, Family Studies; Gerontology. The book *“Psychologie des Alterns”* (1972, 11. Ed. 2007) is published in Italian, Netherlands, Spanish, Turkish and Japanese and Korean.

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