

老年教育理论丛书

上海市终身教育研究会 组编

叶忠海 总主编



老年教育经济学

金德琅 主编



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内 容 提 要

本书是“老年教育理论丛书”之一。本书阐述老年教育经济学产生的背景和基础,论述老年教育与经济发展、人力资本再开发、劳动力市场的关系,探讨老年教育投资、资源的利用效率、成本、经济效益、教师劳动报酬等诸多理论问题与实践问题,以模糊集合论为原理创新提出“老年教育拉动消费比重指数”和“老年教育经济保障效率指数”的概念,建立模糊数学模型,并开展实证研究。

本书可供老年教育理论工作者和实际工作者阅读参考。

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序

今天,中国已经成为世界上老龄人口最多的国家,并正在经历着历史上规模最大、速度最快的老龄化进程。据《中国老龄事业发展报告(2013)》显示,2012年我国老年人口有1.94亿,老龄化水平达14.3%,预计2013年老年人口将达到2.02亿。上海的老龄化程度更高,2012年上海老年人口367.32万人,老龄化水平达25.7%。提倡、实践“积极老龄化”是应对之策,更是长远战略。其中,老年教育大有作为。《国家中长期教育改革和发展规划纲要(2010—2020)》强调要“重视老年教育”。在我看来,这至少有三个方面的意义。一是保障老年人的学习权利,实现“老有所学”;二是保障老年人共享科技、社会、经济发展成果的权利,帮助老年人与时俱进、与社会进步同步、实现“老有所为”;三是提升老年人生活价值和幸福度,老年教育因此被誉为“生命尊严教育”。上海还形成了“在学习中养老”的新模式。如何办好老年教育?政府作为公共服务的提供者,在规划发展、保障投入、建设队伍等方面责无旁贷。因此,老年教育决非仅仅是老年人的事,而是全社会的大事。

通过各级政府和社会各方的长期努力,全国各级各类老年大学、老年学校已建成5.97万所,在校学员670万余人,基本形成了全方位、多层次、多形式的中国特色老年教育体系。上海已经把老年教育规划为终身教育体系的一个重要组成部分,老年教育已经实现市、区(县)、乡镇街道、居村委的全覆盖,和各行各业老年教育的全统筹。建设学习型社会,如果占全市25.7%的老年人口不学习,何从谈起?虽然,老年教育已取得令人瞩目的巨大成绩,但在未来前进道路上依然有着诸多课题需要我们进一步加以研究解决。特别是随着老年教育实践的不断深入,老年教育理论研究滞后的问题日益凸显,无论是老年教育事业发展的宏观领域还是老年教学的微观领域都亟须适切性的理论指导。

可喜的是,今天我们看到越来越多的专家学者和研究机构已经开始关注老年教育理论建设工作,并且凭着高度的责任感和使命感用实际行动开始了有益探索,涌现出了一批有价值、有质量的研究成果。上海市终身教育研究会以及学术委员会的全体同仁推出的“老年教育理论丛书”,从教育学、经济学、管理学、心理学等多学科视角聚焦老年教育研究,为老年教育的学科理论体系建构迈出了可贵的一步。



与其他教育类型比较,老年教育仍处在早期探索阶段。以1972年法国“第三年龄大学”创立为标志,西方现代老年教育不过40多年历史。以1983年山东省红十字老年大学创办为标志,中国现代老年教育只有30年历史。相比之下,老年教育理论研究更是才刚起步。所以,对这套丛书的价值认识不是看其理论多么严密和完备,而在于它所体现出的一种价值取向、行动方向以及教育工作者的职业精神。我相信,会有更多的有识之士、专业人才聚集到老年教育领域,以他们的智慧、才华和奉献精神为推动老年教育事业更好更快的发展贡献力量。

是为序。

上海市教育委员会副主任 袁雯

2013年12月24日



Preface

Today, China has become a country that has the biggest number of senior citizens in the world and its population is undergoing the largest and fastest aging process in history. According to *The Report on Older Persons and Development in China (2013)*, in 2012 there were 194 million older persons in China, accounting for 14.3 percent of the total population. It was estimated that in 2013 the elderly population would reach 202 million. The percentage of older persons in Shanghai is much higher. In 2012 Shanghai's elderly population reached 367.32 million, 25.7 percent of the total population in Shanghai. Advocating and implementing the "active aging" program is not only an effective measure to deal with the problem, but also a long-term strategy. Therefore, education for seniors has much to offer.

National Education Reform and Development of Long-Term Planning Programs (2010—2020) emphasizes the need to "pay attention to education for the aged". In my opinion, there are at least three areas of significance. In the first place, it is to protect the rights of older people to learn, to make progress in their old age; Secondly, it is to ensure that our senior citizens share technological, social and economic achievements, to help them keep up with the times, keep abreast with social progress and make contributions in their old age; Thirdly, it is to increase the value of life and well-being of our senior citizens. Education for the aged is also defined as "education of the dignity of life". Shanghai has formed a new model of "learning while ageing". What can we do to implement the education for our senior citizens? The government as a provider of public services has a responsibility in planning and development, in securing sufficient investment, and in building a team of professionals and personnel. Therefore, education for the aged is definitely not concerned only with older persons — it is a major undertaking of our society.

Through long-term efforts by all levels of the government and all sectors of society, 59700 colleges and schools for the aged at all levels have been set



up with more than 6.7 million students, forming a comprehensive, multi-level, multi-form older-person educational system with Chinese characteristics. In Shanghai education for the aged has been designed to become an important part of the lifelong education system. There are educational programs for the aged at all levels and all walks of life, in villages and neighborhood, in towns and city districts.

The construction of a learning society would be incomplete if the city's senior citizens, accounting for 25.7 percent of the total population, are not participating. Although remarkable achievements have been made in the field of education for the aged, there are still many issues to be studied and many problems to be solved on the road ahead. Especially important is the research on the theories of education for the aged, which cannot meet the demands by the educational practice. In fact, both the macroscopic development of education for the aged and microscopic practice of learning for the aged are in urgent need of appropriate theoretical guidance.

Today it is to our relief that more and more experts and scholars and research institutions have begun to pay attention to the construction of a theoretical framework of education for the aged. With a high degree of responsibility and mission, they have started meaningful explorations and produced a series of invaluable and quality research results. Launched by my colleagues at Shanghai Lifelong Education Research Association and its academic committee, the book series *The Elderly Education Theory Series* focuses on the research for older-person education from a multidisciplinary perspective of education, economics, management, psychology and technology, thus taking a valuable step towards building as a disciplinary the theoretical framework of education for the aged.

Compared with those of other types of education, the development of education for the aged is still at an early stage. For the western countries, it has a history of 40 years since the founding of the University of Third Age (UTA) in France in 1972. For China, it has a history of only 30 years since the founding of Shandong University for the Aged in 1983. On the other hand, the theoretical research is just beginning. Therefore, the value of this collection lies not in how tight and perfect the theories discussed are, but rather in the kind of value orientation, action guidance and professionalism of



educators it reflects. I believe that there will be more enlightened professionals who come to work in the field of education for the aged and with their wisdom, talent and dedication make great contributions to the promotion of the cause of education for the aged.

Deputy Director of Shanghai Municipal Education Commission

Yuan Wen

December 24, 2013



前言

人口老龄化已在世界快速发展,20世纪末世界已进入老年型社会。同样,我国人口老龄化速度超前现代化。2013年底,老年人口已突破2亿,老龄化水平已达14.8%，“未备先老”、“未富先老”的特征日益凸显,这显然对社会经济发展带来重大挑战。面临人口老龄化的压力,如何科学而有效地减轻压力,乃至于变压力为动力?其中,一个战略性的有效途径和举措,就是大力发展老年教育。可见,老年教育随人口老龄化显得越来越重要,对其系统而全面的研究显得日益迫切。

然而,相对于我国老年教育事业的迅速发展而言,老年教育理论研究显得相当滞后。据不完全检索,自1983年我国第一所老年大学建校至2011年,公开出版的老年教育学术著作只有10余部。其中,代表性的著作有:王荣刚等《老年心理与教育》(1994),刘书鹤等《老年教育学》(1994),中国老年大学协会教研组《老年学校教育学》(1998),陈福星等《老年教育概论》(2004),郑令德、高志敏等《和谐社会与老年教育》(2007),董之鹰《老年教育学》(2009),施祖美等《老年教育策论》(2011),孙建国等《中国老年教育探索与实践》(2011)等。总的来看,我国老年教育理论研究仍处于初创阶段。其特点“五多五少”,即多的是工作研究,少的是基础理论研究;多的是零散研究,少的是系统研究,更缺少的是学科体系研究;多的是宏观一般关系研究,少的是微观深入教学、课程研究;多的是老年学校教育研究,少的是整个社会老年教育研究;多的是单兵作战,少的是联合攻关研究。可见,我国老年教育理论研究远不能满足老年教育事业和老年教育工作者发展的需要。

基于上述的研究状态,为了促进老年教育事业的发展及老年教育科学的建设,经上海市终身教育研究会学术委员会研究商定,组织全市有关学术力量编撰出版一套“老年教育理论丛书”。其预期目标:力求满足老年教育工作者认知和工作实践的需要,成为发展老年教育的理论参考书,为老年教育实践服务;力求满足中国特色老年教育科学体系建设的需要,成为国内老年教育科学初创时期的有影响著作,为老年教育科学建设服务。本套丛书初步策划有:《老年教育学通论》、《老年教育心理学》、《老年教育管理》、《老年教育经济学》、《老年教育社会学》、《远程老年教育》、《中国新时期老年教育发展史》、《海外老年教育》等,拟分两批出版。





本套丛书的编著原则：一是方向性原则。丛书的编著坚持正确的政治方向，以马克思主义关于人的全面发展思想，党和国家关于以人为本思想为指导。二是科学性原则。丛书的编著强调学科的体系和内在逻辑性，观点正确，论据充分，说服力强。三是创新性原则。丛书的编著坚持创新，以新的历史标尺、新的时代要求、新的理念思想，贯穿于编著全过程。四是特色性原则。丛书的编著强调反映中国特色以及老年人和老年教育特性。五是实践性原则。丛书的编著坚持来源于实践，又指导实践，尤其要反映近几年来老年教育实践和探索研究的新成果，为老年人发展和老年教育工作实践服务。

为了保证丛书达到预期的目标，本研究会学术委员会成立了丛书编委会。邀请研究会张德明会长、王民常务副会长、王宏副会长担任顾问。由学术委员会正副主任承担丛书正副总主编。编委会主要负责：策划设计、组建力量、统筹协调、组织审稿、联系出版等事项。

在著作撰写出版过程中，得到了市教委副主任袁雯教授的大力支持，她专为本丛书作“序”；得到了市教委终身教育处庄俭处长、夏瑛副处长的大力支持，他们分别承担了丛书副总主编和编委；得到了上海开放大学、上海终身教育研究院、上海外国语大学、浦东新区社区学院、普陀区社区学院、长宁区社区学院等单位的大力支持、帮助和配合；得到了同济大学出版社张平官编审和李小敏编辑的鼎力相助，在此一并表示诚挚的谢意！

老年教育是一项正在快速发展的事业，其运行轨迹和发展规律正在展开，由于作者工作经历和研究积累的局限性，再加上时间较为仓促，对有关问题的研究有待进一步实践和深化，丛书难免存在不足之处，恳请有关领导、专家、学者，老年教育工作者和广大读者批评指正。

叶忠海

2013年12月

Forewords

At the end of 20th century, the world had entered the aging society with the rapid growth of the aging population. Similarly, the rate of China's aging population outstrips the speed of modernization. At the end of 2013, the elderly population has exceeded 200 million; the level of aging has reached 14.8%. The features of "Aging before preparing well", "Aging before getting rich" has become increasingly prominent. Obviously, it has brought great challenges to the socio-economic development. Faced with the pressure of the aging population, how to effectively alleviate the pressure and then turn it to motivation? One of the strategic ways to deal with this problem is to vigorously develop the education for the aged. With the aging of the population, elderly education has become more and more important, and its systematic and comprehensive research is becoming increasingly urgent.

However, compared with the rapid development of the education for the elderly in China, theoretical research for the elderly education lags behind. According to incomplete statistics, from 1983 when the first university was established in Shandong province for the aged to 2011, there published only about 10 academic books. The representative works include *Psychology and Education for the Aged* written by Wang Guangrong in 1994; *Geriatric Education* written by Liu Shuhe in 1994; *Aging school education* written by members of Chinese Elderly University Association in 1998; *Introduction of Elderly education* written by Chen Fuxing in 2004; *Harmonious society and Elderly education* written by Zhen Lingde and Gao Zhimin in 2007; *Geriatric Education* written by Dong Zhiying in 2009; *Elderly education Theory* written by Shi Zumei in 2011; *Exploration and Practice of Elderly education* written by Sun Jianguo in 2011, etc. In conclusion, theoretical study of the elderly education in China is still in the infant stage and also has its characteristics; we have more working research but less basic theory research; more scattered research but less systematic research or discipline system research; more relationship research at the macro level but less micro-level



teaching and curriculum research in depth; more aging school education research but less elderly education research of the whole society; more individual research but less cooperation research. Evidently, the theoretical research of elderly education in China is not enough to facilitate the development of elderly education and the workers who are engaged in elderly education.

Based on the above research state, in order to promote the development of the education for the elderly and the construction of the elderly education science, Shanghai Lifelong Education Academic Committee organized the relevant academic experts to publish the set of The "Elderly Education Theory Series". These works are expected to meet the practice needs of the people who are engaged in elderly education and to serve the practice of elderly education as well as the construction of elderly education science system with Chinese characteristics. This series could be the influential work in the start-up period of domestic elderly education science and also would be the reference books to develop the elderly education theories. This series includes: *General Theories of Elderly Education*, *Economics of Elderly Education*, *Sociology of Elderly Education*, *Psychology of Elderly Education*, *Management of Elderly Education*, *Distance Elderly Education*, *The History of Chinese Elderly Education in New Era*, *Overseas Elderly Education*, etc. It is estimated that these books will be divided into two groups and be published in sequence.

In this series, there are five principles needing to be complied with. The first one is Direction. The compilation of the book pursues a correct political direction and is guided by the thought of man's all-round development from Marxism and the philosophy of people oriented from the Party and the Country Secondly, this book is based on Science. That means the books emphasize on discipline system, logic, sound viewpoints, abundant evidence and powerful persuasion. The third principle is Creativity. The compilation of these series sticks to Creativity principle; the whole process of compilation is based on new historical scale, new times' demands and new ideas. The fourth one is that these series have their unique features; they reflect Chinese Characteristics and the features of the aged and the elderly education. The last principle is that these books stick to Practice. The compilation of these books is



based on practice and in turn serves practices. Moreover, these books especially reflect the new achievements in recent elderly education practices and researches. All of these can serve the development of the aged and the practices of elderly education in the future.

In order to achieve the desired objectives, the academic committee of research association set up serials editorial board, which inviting president Zhang Demin, Vice-president Wang Min, and Wang Hong as consultants. Chief editor and subeditor of the series were represented by chief director and sub director of academic committee. The editorial board is mainly in charge of designing, co-ordination, peer reviewing and contacting press, etc.

In the writing and publishing process of this series, we have received strong support from professor Yuan Wen, Deputy Director of Shanghai Municipal Education Commission, who writes the “preface” for this book; these series also receive great support from Zhuang Jian, Director of Lifelong Education Department and Xia Ying, Deputy Director of Lifelong Education Department. They are the vice chief editor and the member of editorial board respectively. In addition, it is very grateful for the great support and cooperation from Shanghai Open University, Shanghai Lifelong Education Research Institute, Shanghai International Studies University, and Community Colleges of Pudong New Area, Putuo District and Changning District. Meanwhile, strong support from Tongji University Press and Zhang Pingguan, its vice chief editor as well as the editor Li Xiaomin is gratefully acknowledged.

As elderly education is a cause which is just starting to grow rapidly, its development is still on the way. Due to the limitation of time and the experience of writers, further development for relevant research is required. We are very grateful for the precious advice from experts, scholars as well as readers.

Ye Zhonghai
Dec 2013



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