Services and Housing for the Elderly in Japan ⑥

This is the 6th serialization of Services and Housing for the Elderly in Japan.

Continuing from the last article, I will introduce elderly care facilities that are attracting attention in Asia (especially China, Korea, Taiwan, etc.) in this article. (For facility overviews, please refer to the series #5, the previous article.)

Japan has the fastest aging population in the world.

However, looking at other Asian countries, it is said that countries like Korea, Singapore, and China would be aging at an even faster rate than Japan.

As you may know, the problem of aging is not that the elderly live longer (with longer life expectancy), but rather a declining birth rate. A small population to support the elderly leads to problems with the medical insurance system, pensions, and long-term care insurance. In fact, problems such as a lack of family members living at home to care for the elderly and the difficulty in securing staff to work in the nursing care industry have come to the fore.

The number of the elderly living alone in Japan is steadily increasing. The number of people aged 65 and over living alone is rising for both men and women, with approximately 18% of men and 25% of women living alone. In particular, one in four elderly women lives alone. It is also notable that the recent trend is that the number of elderly men living alone is increasing at a faster rate than that of elderly women living alone.

As of the end of July 2025, the number of elderly people certified as requiring nursing care or assistance in Japan is 7.177 million. As the population ages, the number of the elderly certified as requiring nursing care or assistance is steadily increasing.

As the elderly population increases, so must the number of caregivers. The number of caregivers had been rising since the start of the public long-term care insurance system in 2000. However, in October 2023, it turned downward for the first time, to approximately 2.126 million (29,000 fewer than the previous year).

According to estimates released by the Ministry of Health, Labor and Welfare in July 2024, approximately 2.4 million and 2.72 million caregivers will be required in 2026 and 2040, respectively. While the number of caregivers is taking a downward turn, these figures are not realistic (based on the service volume forecast for long-term care in the 9th long-term care insurance business plan).

The government will implement comprehensive measures to secure nursing care personnel, including (1) improving the working conditions of nursing care staff, (2)

securing and developing diverse human resources, (3) preventing nursing care staff turnover, promoting nursing care staff retention, and improving productivity, (4) making nursing care work attractive, and (5) building a good environment to accept foreign personnel. However, the labor shortage is said to stem from low wages compared to those of other industries.

Not only in Japan but also in any other Asian countries in the phase of low birth and death rates, the shortage of caregivers in the nursing care industry is not just someone else's problem.

The required number of caregivers based on the 9th long-term care insurance business plan

○ The number of caregivers required estimated by prefectures based on the service volume forecast for the long-term care in the 9th long-term care insurance business plan, prefectures is:
・Approximately 2.4 million people in FY2026 (+approx.250,000 (63,000/year))
・Approximately 2.72 million people in FY2040 (+approx.570,000 (32,000/year))
*Numbers in the parentheses are compared to FY2022 (approx. 2.15 million people)
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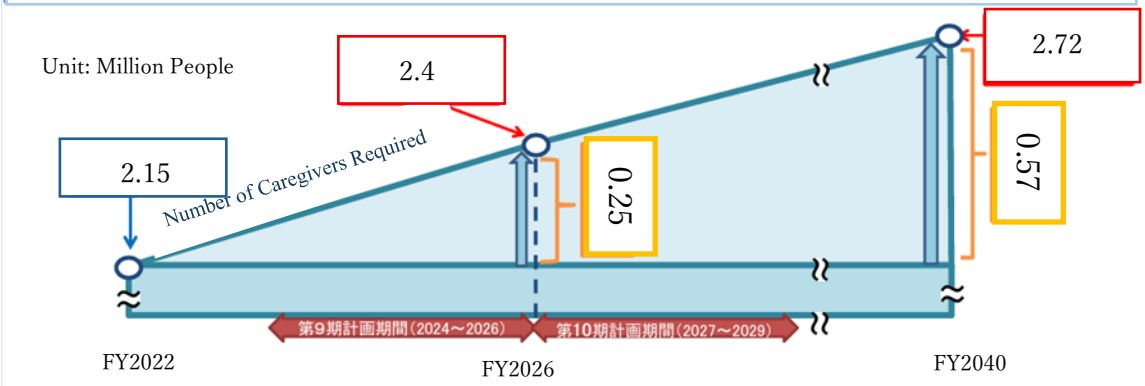


* 2.15 million people, the number of caregivers, in FY2022 are according to the FY2022 survey of nursing care service facilities and businesses
** The required number of caregivers (2.4 M. and 2.72 M.) are based on the estimates provided by each prefecture based on the projected service volume of the municipalities in the 9th long-term care business plans with the 2022 figure of 2.15 million as a baseline.
*** The required number of caregivers include the number of staff needed in long-term care service facilities and facilities covered by the long-term care insurance system and the number of staff required for home-based preventive care services.

Source: Ministry of Health, Labour and Welfare; "The required number of caregivers based on the 9th Long-Term Care Insurance Business Plan"

While the government is implementing comprehensive measures to secure nursing care personnel, the introduction of AI, ICT, and DX is also being promoted simultaneously.

Monitoring systems, communication robots, and wearable assistive robots - the prototype of such products was already there, if I look back 20 years. They were still simple products back then; however, we now have wearable assistive robots that can improve, support, enhance, and regenerate a wearer's body functions, assistive robots for

the elderly, and communication robots. There are also monitoring systems that can detect impending dangers through each client's particular movements and moving patterns.

Regardless of the advancement of technologies in nursing care, such as nursing robots improving efficiency to care for the elderly and ICT, there are still various problems remaining unaddressed.

Within this context, Social Welfare Corporation Zenkoukai developed the Smart Care Operating Platform, or SCOP.

SCOP is an information management system designed to increase the efficiency of operation and the quality of service in nursing facilities. It integrates with various nursing care equipment; therefore, the healthcare data of the facility's residents can be centrally controlled and visualized.

SCOP was developed under a project called the Project to Promote the Development and Standardization of Robotic Devices for Nursing Care (Development Subsidy Project) in 2018 by Japan Agency for Medical Research and Development, or AMED. With SCOP, Zenkoukai is a recipient of the development support for a caregiving robot that aims to improve the quality of care and promote independence for the elderly, in accordance with the needs of the caregiving field, under the "Assistance in nursing care services" category, which is one of the priority areas identified by the Ministry of Economy, Trade and Industry and the Ministry of Health, Labour and Welfare.

In addition, SCOP was once again selected for the AMED's "Project for Promotion of Development of Robotic Care Equipment and Related Technologies (Development Grant)" program in 2022. Aiming to expand the support areas and to build the foundation to realize scientific nursing care, Zenkoukai believes it can create a society where all the elderly can receive appropriate nursing care that has been scientifically proven to be effective by advancing this kind of development.

This is the system I introduced last time and implemented by Zenkoukai, which enables it to engage in a paperless environment and to eliminate unnecessary meetings.

SCOP has been developed in a very constructive manner. Extensive research and analysis have been conducted to ensure its practical application for improving business operations. It is a common practice in other industries, but the nursing care industry (or the long-term care insurance system) is still new, so many aspects are not yet systematized, verbalized, or quantified.

First, Zenkoukai started by instilling a mindset for business improvement at the preparation stage. Next, it surveyed to quantitatively and qualitatively visualize the operations and operational challenges during the visualization process. Visualization

involves identifying which operational tasks consume more time through a time study (working hours survey) and determining the steps taken for a series of operations through business process analysis (detailed process survey), among other methods.

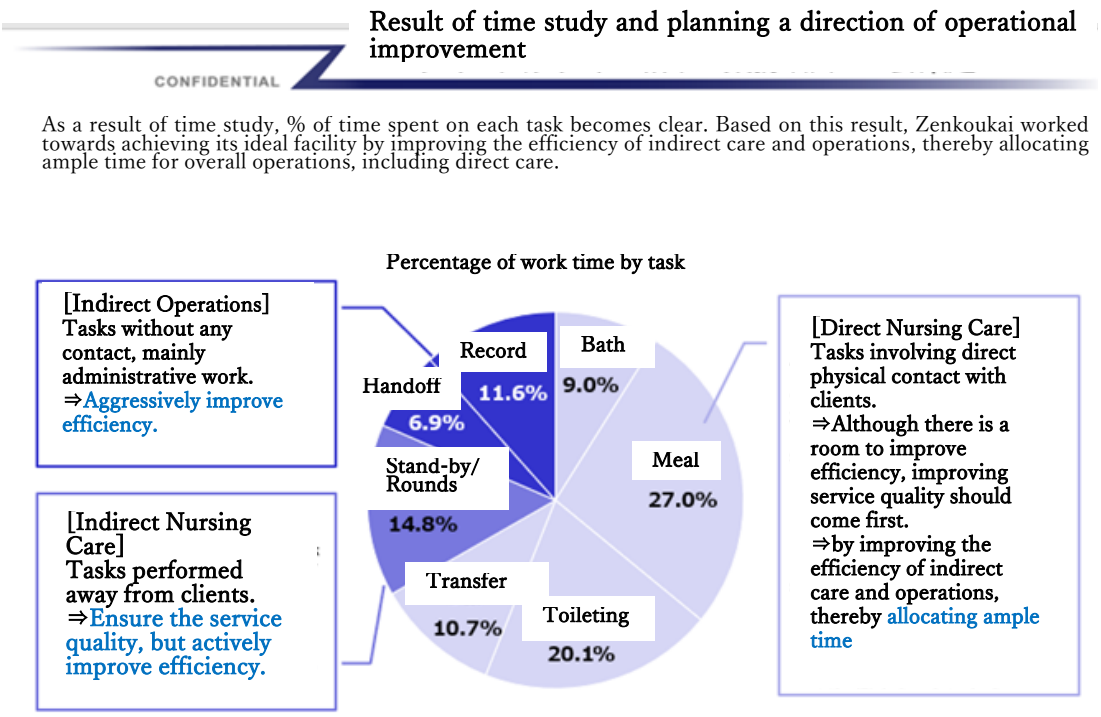
Then the proportion of operational hours for each task is divided into direct nursing care, indirect nursing care, and indirect operations. Based on this result, Zenkoukai worked towards achieving its ideal facility by improving the efficiency of indirect nursing care and operations, thereby allocating ample time for overall operations, including direct nursing care.

[Direct nursing care] Tasks involving direct physical contact with clients, such as assisting with meals, toileting, bathing, and transfer assistance.

[Indirect nursing care] Tasks performed away from clients, such as stand-by assistance or making rounds.

[Indirect operations] Tasks without any contact with clients, mainly administrative work such as record-keeping and handoffs.

Moreover, in addition to analyzing operational time, Zenkoukai was able to target areas for operational enhancement by classifying tasks based on the frequency of direct client contact.



A critical factor for success is employee cooperation. Let them understand that implementing these procedures may be temporarily troublesome for them; however, it

will eventually reduce job-re lated physical and mental stress, allowing them to work with more ease. By allowing staff sufficient time to work, service quality for clients will be increased.

It is essential to explain the mindset for and the benefits of operational improvement to employees, and to establish a cooperative relationship with them beforehand.

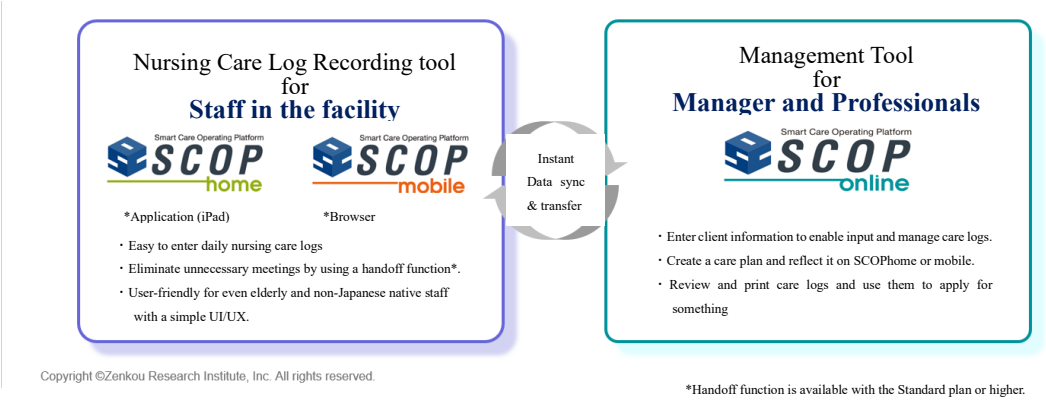
Furthermore, "SCOPmobile" is the most advanced, first ICT application in the nursing care industry, offered free of charge. It was developed to provide all caregiving professionals with a digital solution for their work. It allows recording on smartphones and tablets with various operating systems, with both voice and handwriting input. The design is user-friendly, making it easy for even senior staff to operate.

It is essential to improve the quality of care and reduce the workload through digitalization, and increase staff salaries.

For the more efficient record-keeping tasks - a system inspired by the needs of the nursing care field.

SCOP, nursing care software, was developed based on the needs and requests of staff workers working in actual nursing care facilities.

With the increasing number of older and foreign-born staff members, we have developed software that is easy to use even for those who are not proficient in Japanese or computer skills, and which includes many essential functions for daily tasks such as record-keeping and handoffs.



In my next article, I will discuss an improvement to SCOP and a certification called Smart Caregiver.

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