

# The Evolution and Institutional Logic of China's Community Elderly Care Service Mechanism — An Analysis Based on Historical Institutionalism

Mao Jingxiang<sup>1\*</sup>

<sup>1</sup> School of Public Administration, Sichuan University, Chengdu, Sichuan, China

\* Correspondence: School of Public Administration, Sichuan University, Chengdu, Sichuan, China

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**Abstract:** The community elderly care service mechanism is a crucial component of the socialized elderly care service provision system in China's aging society. Its timely evolution represents a significant supporting force for the national strategy of actively responding to population aging. Employing the analytical framework of historical institutionalism, this paper identifies four developmental stages of China's community elderly care service mechanism: initial emergence, early exploration, rapid development, and optimization/upgrading. It examines the critical junctures and developmental pathways of this mechanism through the lens of evolutionary logic and driving forces, analyzing the macro, meso, and micro-level dynamics. This analysis aims to accurately delineate the achievements and challenges of the current community elderly care service system in China and to offer theoretical and practical insights for its future development.

**Keywords:** community elderly care service mechanism; institutional change; historical institutionalism

## 1. Introduction

The development of elderly care initiatives and services is integral to public welfare, directly impacting people's sense of happiness and fulfillment. Since the reform and opening-up, China has formulated and implemented a series of policy documents concerning elderly care initiatives and service system construction, providing clear policy guidance for the development of its elderly care service system. In practice, the continuous

improvement of various strategic plans and policy texts has progressively enhanced the state's capacity to address population aging, leading to a more diversified elderly care service system. Beyond traditional family-based care, a wider range of socialized elderly care services have developed rapidly, leveraging their respective strengths. As the grassroots unit for policy implementation, social governance, and resource allocation—serving as the nexus connecting top-down government resources,

bottom-up public needs, and inward-flowing social capital—the community has increasingly become the central hub within the elderly care service system. Communities now undertake an expanding array of increasingly sophisticated and diverse elderly care services, gradually evolving into a major platform integrating family-based and institutional care services.

Community elderly care services refer to the provision of daytime care, recreational activities, and other services for the elderly within a community, typically through established service centers (Gao, K., 2015). To better clarify the community elderly care service mechanism and promote its development, the 14th Five-Year Plan introduced a new definition, characterizing it as “regional elderly care services focused on care, radiating to the surrounding community, and incorporating in-home services.” Therefore, within China’s elderly care service system, community elderly care is an approach that relies on the community as its core base, utilizes professional teams, and integrates various local resources to deliver services, representing the convergence of diverse elderly care models within the community. China’s exploration of a community elderly care service mechanism began in the 1980s. With the introduction of a series of policy documents such as The Seven-Year Development Outline for China’s Aging Work (1994-2000), the mechanism has gradually developed and improved, forming a clear historical trajectory. Existing research primarily focuses on the institutional structure, operational conditions, resource inputs, actor behaviors, and outcomes of community elderly care: Firstly, China’s elderly care policy orientation has undergone historical stages of initial establishment, coordinated development, refined development, and integrated development (Han, Y., & Fu, J., 2020), during which community elderly care gradually emerged as a significant mechanism. Secondly, factors such as urban-rural disparities, regional differences, economic gaps, and variations among elderly groups remain important conditions influencing community elderly care services (Yang,

L., & Shi, W., 2022). Thirdly, research on actor behavior in community elderly care mainly concentrates on the needs, preferences, and modality choices of the elderly population. Finally, extensive analysis and discussion focus on the outcomes of community elderly care—such as quality, standardization, equity, and precision—and the pathways to achieve them (Lin, B., 2021; Peng, X., & Su, Z., 2022).

In summary, community elderly care has increasingly become a vital component of the elderly care service system and is integral to achieving the goal of “elderly support.” Promoting the development of the community elderly care service mechanism is a key aspect of high-quality social elderly care services. Advancing community elderly care in the new era requires a historical perspective to clarify its evolutionary trajectory, structural changes, and key driving forces, thereby addressing the following core issues: first, to delineate the evolution of the community elderly care service mechanism; second, to understand its evolutionary logic; third, to analyze its driving forces; and fourth, to explore its future development.

## 2. Analytical Framework

Historical institutionalism is a political science research method and school of thought that has emerged since the 1980s. It examines and analyzes institutions from a historical perspective by rediscovering, sorting out, and analyzing major historical events. At the same time, it reviews and sorts out institutional systems to trace and respond to history through institutions. According to this theory, institutions do not exist naturally, but are shaped and manifested by historical forces and the combined effects of various complex forces (Liu, S., 2010: 7).

Within historical institutionalism, institutions function as both independent and dependent variables: On one hand, when researchers examine them through the lens of institutional theory, the focus is on institutional change, analyzing the processes through which institutions undergo

regeneration, transformation, replacement, or termination under specific objective conditions and contexts (Qin, H., & Wang, M., 2015). Institutional research concerns core questions such as when institutions change, what driving forces prompt institutional reform, the processes and modes of institutional change, and how institutional efficacy and functions are realized. This approach examines the dual characteristics of institutions as variables, aptly analyzing the significant role of institutional elements in political life (Liu, S., 2010: 147-148). On the other hand, when researchers adopt a temporal theory perspective, the focus shifts to the temporal sequence of institutional evolution, analyzing the impact of temporal elements on institutional change and policy variation, along with their outcomes (Liu, S., 2010: 149). Historical research emphasizes core issues such as the sequential linkage of historical time, institutional inertia, the influence of critical junctures, and the role of contingent events (Chen, Z., 2003: 164-167).

The suitability of historical institutionalism for this study lies in several aspects: First, its emphasis on historical perspective facilitates long-term and broad-scope research on policy evolution (Liu, S., 2010: 3). The community elderly care service mechanism has developed over several decades, forming a relatively clear historical trajectory and policy evolution path, meeting the basic conditions for historical institutionalist analysis. Second, the "dynamic" nature of historical institutionalism aids in studying institutional change within historical and traditional contexts. The development of the community elderly care service mechanism has experienced numerous nodal events and institutional shifts, creating a degree of "path dependence." Establishing a new equilibrium by integrating traditional and modern elements provides a more comprehensive and open research perspective for the mechanism. Third, historical institutionalism not only focuses on institutions and their causes but also on the direction and patterns of institutional evolution, offering explanatory and guiding insights for the future development of the community elderly care service mechanism.

Therefore, based on the analytical framework of historical institutionalism, this study follows this research approach: First, through the collection, sequencing, and analysis of policy documents, it outlines the evolution of China's community elderly care service mechanism, identifies critical junctures where policy heterogeneity was stronger earlier and weaker later in the timeline, clarifies its main developmental stages, and summarizes the key characteristics of its evolution. Second, it employs the structural perspective of historical institutionalism to analyze the varying impacts of changes in the national macro-context, forms of community elderly care, societal perceptions of elderly care, and elderly care technology on the mechanism's evolution. It explores the influences of political variable shifts and actor interactions on this evolution (Cheng, T., & Wei, L., 2019). Third, using the historical perspective of historical institutionalism, it analyzes the differential impacts of major historical events, guiding driving factors, and developmental path dependence on the mechanism's change, investigating the significant role of the institutional development process. Finally, integrating the historical and structural perspectives, it summarizes the key dynamics and pathways of institutional change to prospect the future development of the community elderly care service mechanism.

### 3. Historical Evolution

The development of Chinese community elderly care service mechanism has broadly undergone four stages: initial emergence, early exploration, rapid development, and optimization/upgrading. Throughout these stages, community elderly care has evolved from non-existence to providing safety-net guarantees, establishing a systemic framework, and finally offering diverse, age-friendly services. It has transitioned from a passive, embedded, single-faceted service adjunct to economic construction towards an integrated, proactive community-based service system actively responding to population aging.

### 3.1 Initial Emergence: Launch of Aging Work and Proposal of Community Elderly Care (1978-1999)

Prior to 1978, under the planned economy, elderly care in China relied primarily on family support, supplemented by basic services and security provided by urban work units and rural collectives. Following the reform and opening-up, with the dissolution of the planned economy system and the establishment of a socialist market economy, these work-unit-based care mechanisms gradually faded. Coupled with the trend towards smaller family sizes, there was an urgent need to construct new elderly care service mechanisms to meet growing demands.

In 1983, the State Council approved the establishment of the China National Committee on Aging and set up corresponding agencies nationwide (Fang, J., 1996), marking the beginning of systematic leadership and development in aging initiatives. In 1992, the 47th UN General Assembly held a special session on aging, adopting the *Proclamation on Aging* and the Global Targets on Aging for 1992-2001. These documents highlighted that revolutionary changes in social demographics necessitated fundamental shifts in societal arrangements (Yang, W., Chen, W., & Zheng, G., 2022), subsequently driving the rapid development of socialized elderly care services in China. Overall, during this stage, China's aging work system gradually took shape, the concept of community elderly care was introduced, and various practical explorations were swiftly initiated.

The steady advancement of aging work and the initial emergence of community elderly care were key features of this period. In terms of policy content, regulations, outline plans, and policy texts such as *The Seventh Five-Year Plan for National Economic and Social Development*, *The Seven-Year Development Outline for China's Aging Work (1994-2000)* and the *Law on the Protection of the Rights and Interests of the Elderly* introduced new requirements concerning the socialized management reform of elderly care services (Xinhua News Agency, 1986) and the expansion of

community support and service scope (State Planning Commission, 1994). They also established the legal framework for China's elderly care services. In practice, the convening of community elderly care service forums in some cities (e.g., Wuhan) and the establishment of the National Working Commission on Aging (Han, Y., & Fu, J., 2020) represented new explorations in community elderly care during this phase. These efforts gradually led to the formation of a range of community service projects, including elderly care services (Song, Q., Yang, K., & Chen, X., 2020), while further refining China's aging work system.

*Legitimization, dependency, and exploratoriness* were the main characteristics of community elderly care evolution in this stage: *Legitimization* refers to the establishment and gradual improvement of the legal support framework for the community elderly care service mechanism. The enactment of laws such as the *Law on the Protection of the Rights and Interests of the Elderly* constructed the basic framework for China's aging initiatives. *Dependency* stemmed from the objective reality of China's relatively low overall productivity at the time, where the focus of social production was on ensuring basic livelihoods. Consequently, aging initiatives and policies were often embedded within economic development plans, exhibiting a dependent characteristic. *Exploratoriness* manifested after the formation of community services in China, with localities across the country actively exploring community services, including elderly care, which practically spurred the initial emergence and pioneering exploration of community elderly care services.

### 3.2 Early Exploration: Exploring the Elderly Care System and Community Safety-Net Guarantees (2000-2012)

In 2000, the CPC Central Committee and the State Council issued the *Decision on Strengthening Aging Work*, proposing the establishment of an elderly care service mechanism complementing family, community, and societal support, and striving to build a community-based elderly service system with supporting facilities, comprehensive functions,

and standardized management (National Health Commission, 2000). Subsequently, China's community elderly care service mechanism continuously improved, with its functions strengthening and role becoming increasingly prominent. Overall, during this stage, socialized elderly care in China developed rapidly, and the role of community elderly care became more pronounced, serving a crucial safety-net function. The rapid development of the community elderly care service mechanism and the fulfillment of its safety-net function were key aspects of this period. Regarding the service system, regulations, outline plans, and policy texts such as the *Decision on Strengthening Aging Work*, the *Notice on Issuing the Implementation Plan for the "Starlight Plan" for Community Elderly Welfare Services*, and the 11th Five-Year Plan for the Development of China's Aging Initiatives (2006-2010) made arrangements concerning: proposing requirements for building a community elderly service system; clarifying the community's role as the "main front" for providing elderly welfare services; constructing and expanding a number of elderly care service facilities and activity venues; and attracting more social forces to develop community elderly care (General Office of the State Council, 2006). Meanwhile, revisions to the *Law on the Protection of the Rights and Interests of the Elderly* incorporated elderly care service facilities into community supporting construction plans (Standing Committee of the National People's Congress, 2013), expanding the functional scope of community elderly care services. Regarding safety-net guarantees, regulations, outline plans, and policy texts such as the 10th Five-Year Plan Outline for the Development of China's Aging Initiatives (2001-2005) and the *Opinions on Comprehensively Promoting Home-based Elderly Care Services* addressed aspects including meeting the basic elderly care service needs of the elderly (General Office of the State Council, 2001) and building a community-based elderly care service center network (Ministry of Civil Affairs, 2008), focusing on providing basic services and safety-net guarantees for the elderly in communities.

*Fundamentality* and *safety-net orientation* were the main characteristics of community elderly care evolution in this stage, while *multi-level development* was its primary direction: *Fundamentality* refers to the community gradually becoming the "main front" for providing socialized elderly care services in various plans and policies, an important component in building a distinctive Chinese elderly care service system and a key reliance for socialized elderly care. *Safety-net orientation* characterizes the primary task of community elderly care during this exploratory stage, which mainly involved taking over the elderly care responsibilities previously held by work units to provide basic, safety-net services for the community elderly. *Multi-level development* was a new feature and trend. As the community elderly care service mechanism continuously improved, its functional boundaries expanded, gradually evolving from providing basic care to encompassing multi-level services such as daily living assistance, medical services, and health services.

### 3.3 Rapid Development: Multi-Actor Co-construction and Integration of Medical and Care Services (2013-2016)

In 2013, the State Council issued the *Several Opinions on Accelerating the Development of the Elderly Care Service Industry*, which for the first time clarified the equal status of civil affairs, finance, and other administrative departments in the elderly care sector. It also encouraged social forces to participate in building community elderly care services and proposed promoting the integration of medical and elderly care services. Consequently, community elderly care entered a new stage characterized by multi-actor co-construction and the integrated development of medical and care services. Overall, during this stage, the participating actors in China's community elderly care shifted from singular to plural, and service content particularly emphasized the integration of medical and care services. Multi-actor co-construction of community elderly care and the integrated development of medical and care services were key aspects of this period.

Regarding multi-actor co-construction, regulations, outline plans, and policy texts such as the *Notice on Launching Pilot Reforms of Publicly-Funded Elderly Care Institutions*, the *Implementation Opinions on Encouraging Private Capital Participation in the Development of the Elderly Care Service Industry*, and the *Several Opinions on Comprehensively Opening the Elderly Care Service Market and Improving Service Quality* addressed aspects including: guiding social participation through diversified means and supporting the exploration of new models like “publicly-built, privately-operated” (Ministry of Civil Affairs, 2013); fully leveraging the market’s decisive role in resource allocation for elderly care services and promoting the diversification of service supply entities and methods (Ministry of Civil Affairs, 2015). China’s community elderly care service system gradually entered a new, market-oriented development phase. Regarding medical-care integration, regulations, outline plans, and policy texts such as the *Guiding Opinions on Promoting the Integration of Medical and Elderly Care Services*, the 13th Five-Year Plan for the Development of Civil Affairs, and the *Notice on Central Government Financial Support for Piloting Home and Community Elderly Care Service Reforms* addressed aspects including: promoting the coordinated and unified development of medical/health and elderly care services (General Office of the State Council, 2015); supporting elderly care institutions in appropriately providing medical services and increasing the number of community care beds (Ministry of Civil Affairs, & National Development and Reform Commission, 2016); and conducting multiple batches of differentiated service pilots and implementing community elderly care service reforms (Ministry of Civil Affairs & Ministry of Finance, 2016), exploring new models of medical-care integration in community elderly care. *Multi-actor co-construction*, *medical-care integration*, and *institutional collaboration* were the main characteristics of community elderly care evolution in this stage. *Multi-actor co-construction* reflected the marketization trend of fully opening the elderly care service market. It actively engaged social forces in

community elderly care service provision through methods like “publicly-built, privately-operated,” “institutional reform,” and “social participation,” leveraging their advantages to advance community facilities and services. *Medical-care integration* was a salient feature of this period, achieved by establishing community hospitals and linking medical institutions with communities to combine grassroots medical resources with community elderly care, offering more comprehensive medical and care services for the elderly. *Institutional collaboration* was the primary mode for realizing medical-care integration and various new community elderly care services. As the entities involved in building the community elderly care service system expanded and service types diversified, collaboration became essential to link the professional services of medical institutions, domestic service companies, elderly care institutions, etc.

### **3.4 Optimization and Upgrading: Development of “Elderly Care +” Formats and Diversification of Age-Friendly Industries (2017-Present)**

In 2017, the State Council released the 13th Five-Year Plan for the Development of National Elderly Care Initiatives and the Construction of the Elderly Care System, outlining the future direction of China’s elderly care service system while emphasizing continued strengthening of community elderly care construction. This included supporting communities in conducting home visits for seniors living alone or empty-nesters, leveraging communities’ bridging role, establishing comprehensive community information platforms, and linking with institutional care to enhance service targeting and professionalism (Lin, B., 2021). Consequently, community elderly care services became more diverse, gradually responding to different elderly care needs and providing targeted, varied age-friendly services. Overall, during this stage, China’s community elderly care service system continued to develop, age-friendly services and industries diversified further, and community-

based “elderly care +” formats emerged and grew rapidly.

The emergence and rapid development of community “elderly care +” formats, the increasing diversification of community age-friendly services and industries, and the ongoing consolidation of the community elderly care service system were key aspects of this period. Regarding “elderly care +” formats, regulations, outline plans, and policy texts such as the *Implementation Opinions on Applying Public-Private Partnership Models to Support the Development of the Elderly Care Service Industry*, the Proposal for Formulating the 14th Five-Year Plan for National Economic and Social Development and the Long-Range Objectives Through the Year 2035, and the 14th Five-Year Plan for the Development of National Elderly Care Initiatives and the Elderly Care Service System introduced new requirements concerning: creating a full life-cycle elderly care service chain; establishing a batch of new integrated “elderly care +” formats within communities that combine elderly care with modern service industries like health and wellness and medical care (Song, Q., Yang, K., & Chen, X., 2020); implementing the strategy of actively responding to population aging and promoting the coordinated development of elderly care initiatives and industries (Xinhua News Agency, 2020); and constructing and improving a safety-net, inclusive, and diversified elderly care service system (General Office of the State Council, 2022). Regarding age-friendly services, regulations, outline plans, and policy texts such as the *Notice on Accelerating the Reform of Streamlining Administration, Delegating Power, Strengthening Regulation, and Improving Services in the Elderly Care Service Industry* and the *Government Work Report* made new arrangements concerning: proposing specific measures for “delegation, regulation, and service” reform in the elderly care industry and attracting more elderly care institutions to settle in communities to provide diverse age-friendly services (Ministry of Civil Affairs et al., 2017); and offering certain preferential support to community-based age-friendly and elderly care service institutions (Xinhua News Agency, 2019).

Regarding consolidating the community elderly care service system, regulations, outline plans, and policy texts such as the *Implementation Plan for the City-Enterprise Synergy Inclusive Elderly Care Action (Trial)* and the *Opinions on Strengthening Aging Work in the New Era* addressed aspects including: emphasizing the “inclusive orientation” of elderly care projects to provide “affordable” and “accessible” basic elderly care services for the elderly population (National Development and Reform Commission, Ministry of Civil Affairs & National Health Commission, 2019); and establishing a basic elderly care service list system (Xinhua News Agency, 2021), thereby improving the multi-level community elderly care service system.

“Elderly care +” new formats, diversified age-friendliness, and the listing of basic elderly care services were the main characteristics of community elderly care evolution in this stage: “Elderly care +” new formats are new products arising from the development of elderly care services, targeting new changes in community elderly care service demands and aiming for enriched, high-quality, and personalized service provision. *Diversified age-friendliness* represents a new development in the community elderly care service system and a new requirement for creating more livable, age-friendly community environments. It optimizes the living environment for the elderly and meets their needs for aging well through measures like community and home adaptations for aging and various supportive activities and services. The *basic elderly care service list* is a crucial means to ensure the inclusive provision of community elderly care services. By adopting a listed approach, it safeguards the fairness and comprehensiveness of basic community elderly care services while enhancing the standardization, efficiency, affordability, preferential nature, and accessibility of service items.

#### 4. Evolutionary Logic

Historical contexts determine the internal logic of institutional change and the structural forces

underpinning institutional continuity (Du, P., & Wu, Y., 2023). As an integral part of China's elderly care service system, the community elderly care service mechanism has generally maintained an incremental developmental trajectory, exhibiting strong path dependence, while its change direction can be discerned through key junctures within this gradual process.

#### 4.1 Critical Junctures

Certain critical junctures in the process of institutional evolution exert sustained influence and hold special significance for institutional change (Peng, B., & Pang, X., 2024). The critical junctures in the evolution of China's community elderly care service mechanism mainly include:

(1) **The Proposal and Practical Initiation of the Community Elderly Care Concept:** Following the reform and opening-up, socialized elderly care services began to emerge. In 1987, the Ministry of Civil Affairs first proposed the basic concept of "community elderly care." Subsequent exploratory practices led to the formation of a number of community elderly care service projects, establishing the origins of China's community elderly care. Thereafter, with the continuous advancement of community elderly care practices, its role within the elderly care service system steadily increased. Guided and regulated by a series of laws, regulations, plan outlines, and policy texts, the community elderly care service mechanism gradually matured and improved, with its content diversifying, levels increasing, and quality enhancing.

(2) **The Construction of an Elderly Care Service Mechanism:** In 2000, the promulgation of the Decision on Strengthening Aging Work proposed building an elderly care service mechanism encompassing family, community, and society, initially establishing a relatively comprehensive elderly service system (General Office of the State Council, 2001). It also outlined three development principles for the community elderly care service system: facility support, functional completeness, and standardized management, providing

directional guidance for its systematic and standardized construction.

(3) **Revision of the Law on the Protection of the Rights and Interests of the Elderly:** In 2012, the revised Law on the Protection of the Rights and Interests of the Elderly incorporated elderly daily living services, disease nursing, rehabilitation facilities, etc., into community supporting construction plans. This fully considered the growing and diversifying elderly care needs of the elderly, significantly expanding the functional scope of community elderly care services. Consequently, the community elderly care service mechanism began to gradually transcend the limitations of traditional basic security and safety-net services, developing towards a multi-level, differentiated community elderly care service system.

(4) **Comprehensive Opening of the Elderly Care Service Market:** In 2013, the issuance of the Several Opinions on Accelerating the Development of the Elderly Care Service Industry encouraged social forces to jointly participate in building community elderly care services. Subsequently, the Ministry of Civil Affairs, the National Development and Reform Commission, and other departments issued policy documents such as the Notice on Launching Pilot Reforms of Publicly-Funded Elderly Care Institutions, providing norms and suggestions concerning participating entities, collaboration models, and public construction projects to attract more social forces into the elderly care service industry. After a period of pilot exploration and experience accumulation, community elderly care services also began to gradually move beyond the confines of traditional basic security and safety-net services, developing towards a multi-level, differentiated system.

(5) **Integrated Development of Elderly Care Initiatives and Industries:** In 2017, the release of the Implementation Opinions on Applying Public-Private Partnership Models to Support the Development of the Elderly Care Service Industry supported the creation of full life-cycle elderly care service chains and the establishment of new integrated "elderly care service +" formats within

communities (Ministry of Finance, Ministry of Civil Affairs & Ministry of Human Resources and Social Security, 2017). Subsequently, policy documents like the Proposal for Formulating the 14th Five-Year Plan... also proposed from various angles promoting the coordinated development of elderly care initiatives and industries. Beyond consolidating basic community safety-net guarantees, they explored more diverse age-friendly services and industries, aiming to build a more proactive and diversified community elderly care service mechanism.

#### 4.2 Path Dependence

“Path dependence” refers to the tendency for an institution or policy, once implemented along a certain path, to follow that original path in its subsequent development (North, D. C., 1994). The path dependence of China’s community elderly care service mechanism has facilitated its incremental development through the following four mechanisms:

(1) From the Perspective of Learning Effects: The accumulation of effective practical experience in the operation of the community elderly care service mechanism has led to its continuous reinforcement through learning. The increasing number of service providers, including communities, elderly care institutions, and social organizations, have engaged in practical exploration on how to enhance community elderly care capabilities, forming a relatively fixed set of working methods. This, on one hand, provides a relatively stable institutional field conducive to the relative stability and incremental development of the mechanism. On the other hand, it creates a relatively locked-in developmental path, potentially constraining the initiative of various actors.

(2) From the Perspective of Synergistic Effects: The community elderly care service mechanism is closely linked to social institutions such as politics, economy, and culture. On one hand, it relies on these institutions for its existence, emerging and developing through the articulation, coordination, and synergistic effects of systems like community

services, aging initiatives, and the aging industry. On the other hand, by providing various elderly care services through communities, it also exerts new influences on these institutions, collectively forming a vast organic whole that continuously reinforces the various institutional systems.

(3) From the Perspective of Adaptive Expectations: The operation of the community elderly care service mechanism can generate positive effects or expectations for its multiple stakeholders, forming relatively stable adaptive expectations. Consequently, during its development, actors seek self-adjustment and adaptation based on their own expectations and interests, ensuring the enhancement and deepening of these adaptive expectations.

(4) From the Perspective of Exit Costs: Since its inception, the community elderly care service mechanism has been a collective achievement requiring substantial investment of human, material, and financial resources by the state, society, and other actors. Moreover, after integrating home-based and institutional care models and innovating “elderly care service +” formats, its integration with the socio-economy has deepened, leading to increasingly high exit costs. This also contributes to the relative stability and continuity of the community elderly care service mechanism.

### 5. Driving Mechanisms

Historical institutionalism emphasizes the diverse drivers of institutional change, explaining its dynamics at the macro, meso, and micro levels. Focusing on the community elderly care service mechanism, the macro-context in which institutional change occurs, the behavioral actors involved, and shifting value orientations constitute its macro, meso, and micro driving forces, respectively.

#### 5.1 Macro Driving Forces

##### (1) Political Safeguards

First, the systematic launch of aging work, new domestic and international trends in aging issues, and exploratory practices in community services

spurred the initial emergence of community elderly care services. Starting in the 1980s, as aging issues became increasingly prominent globally, China paid greater attention to aging problems and work, establishing a systematic leadership and operational mechanism for aging initiatives. Early explorations in community services in China also affirmed the important position of elderly care services, practically defining the basic framework for community elderly care.

Second, insufficient supply capacity in socialized elderly care services and the market-oriented provision of community public services drove the rapid development of the community elderly care service system. In the early stages of reform and opening-up, due to relatively low overall social productivity and the immaturity of socialized elderly care providers, the supply capacity of socialized elderly care was relatively inadequate, struggling to meet the growing elderly care needs. In the new era, with market-oriented reforms in community public services and the implementation of a series of more comprehensive supporting policies, increasingly mature market entities have participated in the co-construction of community elderly care, promoting the systematic development of the community elderly care service system.

Third, the integrated development of elderly care initiatives and industries has driven the high-quality development of the community elderly care service mechanism. For a long time, a practical gap existed between elderly care initiatives and the elderly care industry. While communities could shoulder increasingly comprehensive elderly care service provision, they lacked the integrated implementation of supporting elderly care industries. The development of “elderly care service +” formats has fostered community elderly care service chains, aggregating elderly care industries across different stages of the full life cycle to some extent, thereby promoting the high-quality, integrated development of the community elderly care service mechanism.

## (2) Economic Development

First, rapid socio-economic development and increased demand for public services prompted the community elderly care service mechanism to form a three-dimensional framework and provide basic services. With socio-economic progress and the satisfaction of basic livelihood needs, people began paying more attention to self-actualization and development in areas like health and recreation, leading to an explosive growth in demand for elderly care services. As the micro-unit for undertaking and supplying basic public services, communities needed to construct an overall safety-net mechanism ensuring basic elderly care, providing a range of service projects to meet the basic socialized elderly care needs of community residents.

Second, changes in the principal social contradiction and the expansion of elderly care service demand types compelled the community elderly care service mechanism to enhance its service capacity and expand its service offerings. Improvements in social productivity and living standards drove the upgrading of elderly care service demands. The growing aspiration for a better life among the elderly is concretely reflected in demands extending beyond traditional daily care and health security to include diversified needs such as medical rehabilitation, social participation, and psychological consolation, gradually showing personalized trends. These diverse demands have compelled a new round of expansion and upgrading in the community elderly care service mechanism to actively respond to differentiated elderly care demands and achieve active aging.

## (3) Shifting Perceptions

First, the shift in perception from family-based to socialized elderly care represents a change in value orientation at the individual and family levels regarding the community elderly care service mechanism. China’s traditional elderly care model was primarily family-based, supplemented by neighborhood assistance and work unit support. This family-centric concept hindered the emergence of socialized elderly care services to some extent. Since the reform and opening-up, with the trend

towards smaller families and the emergence of socialized elderly care services, traditional family-based perceptions have been challenged. However, due to low social production levels, it remained difficult to meet the demand for large-scale, multi-level, personalized elderly care provision. In the new era, the community elderly care service mechanism—grounded in the community, linking home-based and institutional care, and providing inclusive, convenient services—has gradually become a key component of socialized elderly care. It is increasingly understood and accepted by the elderly, breaking the limitations of traditional perceptions and driving the mechanism's development.

Second, the shift in the basic positioning of community elderly care from security to service represents a change in societal-level value orientation. In its early developmental stages, community elderly care primarily undertook the task of providing basic elderly care security previously handled by collectives (under the "work unit system") and families, amidst the decline of the work unit system and the trend of family miniaturization. Coupled with relatively limited social productivity, insufficient community service capacity, and the exploratory nature of service projects, community elderly care aimed only at providing fundamental security and safety-net services. With the continuous improvement of the mechanism, its service capacity, scope, and quality have significantly increased. Community elderly care can now respond to the increasingly diverse, personalized, and multi-level needs of the elderly, link various professional service resources, create diverse "elderly care service +" formats, and provide varied, high-quality community elderly care services.

Third, the evolution of the elderly care service system's value orientation at the national level—from safety-net guarantees, to equitable access, and then to high quality—represents a change in value orientation regarding the community elderly care service mechanism. Throughout its evolution, alongside continuous improvements in service

offerings, standards, and capabilities, the value pursuit of the community elderly care service mechanism has also upgraded: from ensuring basic safety-net services to striving for equitable access, providing "inclusively-oriented" and "accessible" community elderly care services for residents. In the new era, with the deepening of population aging and the integrated development of elderly care initiatives and industries, society has placed higher demands on elderly care services, calling for higher-quality and more convenient community elderly care. This also guides the new development direction of the current community elderly care service mechanism.

## 5.2 Meso Driving Forces

First, the driving effect of community elderly care service provision under comprehensive marketization. Within the macro-context of comprehensive marketization of socialized elderly care services, various social elderly care providers have developed rapidly by leveraging their advantages. With the advancement of market-oriented reforms in community elderly care, relatively mature social forces such as elderly care service institutions, social organizations, medical institutions, and social workers have entered communities through market mechanisms to provide services, rapidly enhancing the supply capacity of community elderly care.

Second, the pulling effect of increased and diversified demand for community elderly care services. Since the reform and opening-up, China's social production has grown rapidly, and people's needs for a better life have increased daily. In the field of community elderly care, this is concretely reflected in demands for diversification, quality enhancement, and personalization. These growing demands also impose higher requirements on community elderly care, pulling the transformation and upgrading of its supply system and methods.

Third, the integrating effect of grassroots governance and the expansion of public service demands. In the new era, the symbiotic and interactive relationship between community

governance and service provision has become increasingly close. High-efficiency community governance is increasingly becoming an important driving force for integrating and developing high-quality community services. In the field of community elderly care, the co-construction, co-governance, and sharing by multiple community actors have integrated rich actors, service resources, and application scenarios, transforming community governance advantages into abundant momentum for the development of community elderly care services.

### 5.3 Micro Driving Forces

First, the impetus of “Three-Sector Linkage” and “Five-Sector Linkage.” Since China established the “Three-Sector Linkage” mechanism in 2013, where communities, social organizations, and social workers jointly provide community services, the supply subjects of community elderly care have further expanded. With the innovation of the “Five-Sector Linkage” mechanism, community volunteers and social charity resources have also joined the ranks of community elderly care providers. This not only alleviates the workload pressure on communities, social organizations, and community workers but also leverages their respective advantages to bring more flexible and accessible service provision to community elderly care.

Second, diverse participation under the comprehensive marketization of elderly care services. Since 2016, when China proposed fully leveraging the market’s role in elderly care resource allocation and social forces’ role in service provision, community elderly care has also, through the integration of medical and care services, attracted the participation of various specialized service providers, including medical institutions. This has, to some extent, compensated for shortcomings in medical services for the elderly within the community elderly care mechanism, enabling the provision of more professional community elderly care services.

Third, the establishment of “elderly care service +” new formats. Since 2020, the trend of coordinated

development between elderly care initiatives and industries in China has strengthened, gradually giving rise to a number of “elderly care +” integrated new formats within the community elderly care service mechanism. The participation of more social elderly care forces and professional service institutions, especially the establishment of small, embedded elderly care service facilities within communities and community-based home care systems, has further improved the community elderly care service system. New models integrating community-institution and community-home care under these new formats have gradually been established.

### 6. Future Prospects

In the new era, the intertwining of increasing population aging and the significant strategic deployment of actively responding to it imposes higher requirements on the future development of China’s community elderly care service mechanism. Reviewing its evolutionary trajectory, surveying its development paths, characteristics, and contemporary needs, future directions can be anticipated from three aspects: developmental approach, construction orientation, and optimization pathways.

#### 6.1 Adhering to a Historical and Dynamic Developmental Approach for the Community Elderly Care Service Mechanism

The community elderly care service mechanism does not exist in isolation; it is an integral part of Chinese modernization and the distinctive Chinese elderly care service system. Developing this mechanism requires, on one hand, a historical approach, situating development within the historical process to comprehensively and fully grasp the complex dynamics and path dependence of its evolution. On the other hand, it requires a dynamic approach, rooting development in the great practices of the new era to pragmatically and accurately identify its current characteristics and future trajectory. Only by adhering to historical and dynamic perspectives, fully considering the

historical process and contemporary features of its development, implementing its consistent safety-net guarantee function, and closely aligning with its evolving diversified pattern, can we accurately grasp the developmental approach of the mechanism and more actively respond to population aging (Du, P., 2022).

### 6.2 Adhering to a High-Quality and Integrated Construction Orientation for the Community Elderly Care Service Mechanism

The construction of the community elderly care service mechanism in the new era must follow a “high-quality” orientation while discarding “fragmented” and “dispersed” construction concepts, using “integrated” construction to promote even higher-quality development. On one hand, use high-quality development to strengthen the integrated mechanism. Fully leverage the pillar and platform role of community elderly care to coordinate various elderly care resources and projects within the community. Simultaneously, support the functional outreach of institutional care, the home-based care of families, and the integrated development of medical, health, rehabilitation, and nursing care, advancing the integrated development of community elderly care services through service communities. On the other hand, use integrated construction to promote high-quality development. Fully utilize the advantageous conditions of various elderly care models both inside and outside the community. Through the linkage of activity venues, elderly care resources, personnel teams, etc., form synergistic cooperation within the community elderly care service community to maximize service

quality. Provide high-quality, integrated community elderly care services for the elderly.

### 6.3 Adhering to Refined and Smart Optimization Pathways for the Community Elderly Care Service Mechanism

In concrete practice, the community elderly care service mechanism must also promptly respond to new demands of the elderly population, actively embrace new technological means, build mechanisms that emphasize refinement and smartization, and provide more responsive and agile community elderly care services. On one hand, promote the refined supply of the community elderly care service mechanism. Use networks to enhance services, create a community elderly care service network to establish a supply-demand closed loop. Focus on key service nodes like community daytime care centers and elderly service stations, improving the classified service mechanism. Simultaneously, accelerate the overall upgrading of the elderly care service front. On the other hand, advance the smart integration in community elderly care. Through smart integration and reforms utilizing big data and digitalization, create a smart platform for community elderly care services. Build smart scenarios, use smart devices, interconnected scenarios, and online-offline services to form a “technology + elderly” interconnected mechanism, dynamically linking the elderly with the smart community elderly care service mechanism to provide round-the-clock, refined, and smart elderly care services.

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