Japanese e-Learning Market
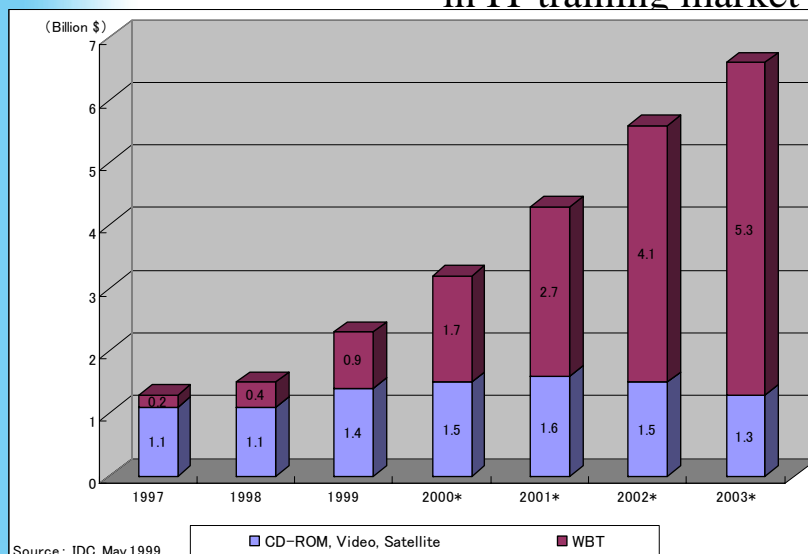
Kiyoshi HARA

Advanced Learning Infrastructure Consortium（ALIC）

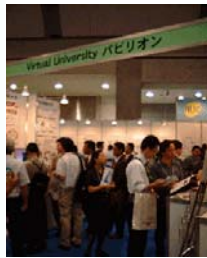December 11th, 2003

Trend: WBT is expanding in Worldwide in IT training market

(Billion $)

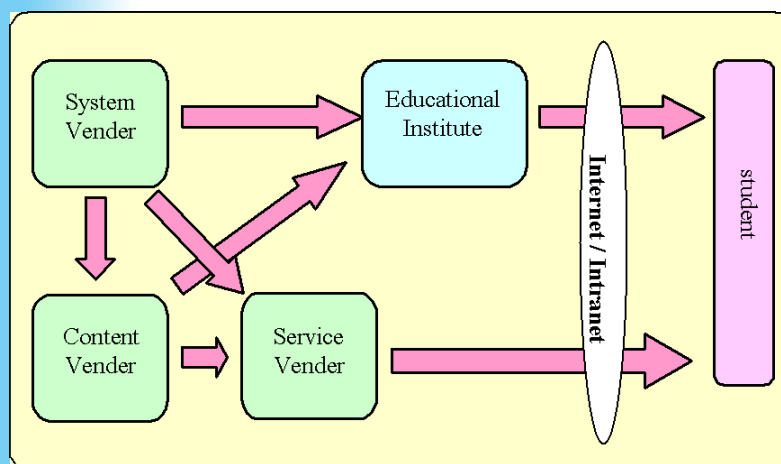|	1997	1998	1999	2000*	2001*	2002*	2003*
WBT	0.2	0.4	0.9	1.7	2.7	4.1	5.3
CD-ROM, Video, Satellite	1.1	1.1	1.4	1.5	1.6	1.5	1.3

Source : IDC, May,1999

e-Learning Market Trends
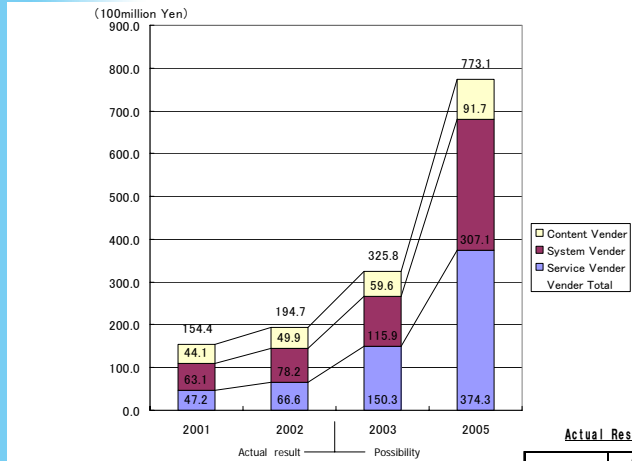
◆2003/7 e-Learning WORLD 2003
- ■Exhibition: 216 exhibitors. 27,400 audience
- ■Seminar: 4 parallel sessions. 38 seminar. 2,800 audience.
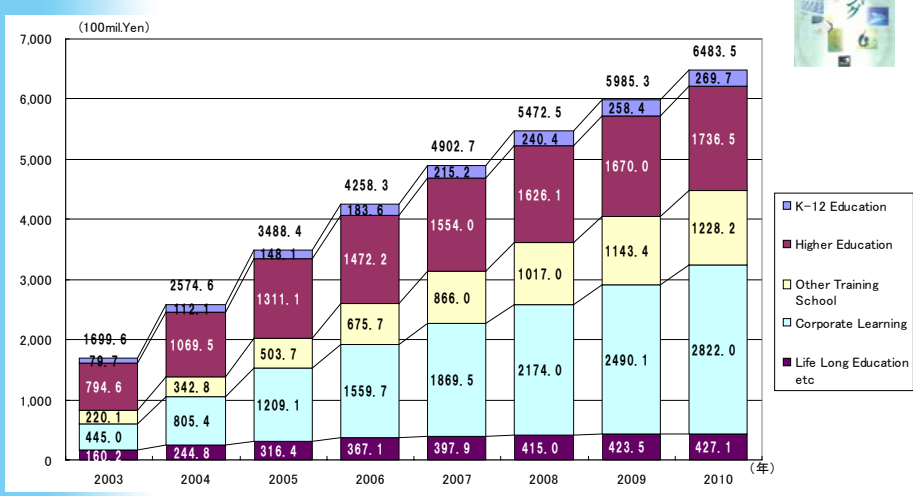
Japanese e-Learning Market' vender

Market size in Japan -vender side-

(100million Yen)

Chart values (2001, 2002, 2003, 2005):
- 154.4 / 194.7 / 325.8 / 773.1 (totals)
- Content Vender: 44.1 / 49.9 / 59.6 / 91.7
- System Vender: 63.1 / 78.2 / 115.9 / 307.1
- Service Vender: 47.2 / 66.6 / 150.3 / 374.3

Legend:
- Content Vender
- System Vender
- Service Vender
- Vender Total

Actual result —— Possibility

2001 2002 2003 2005

(Sevice) 15+7 companise（2001:12+6 companies）
(System) 28 companies 34 systems（2001 25 companies & 28 systems）
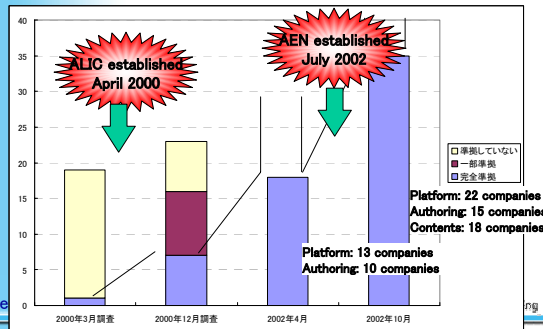(Content) 18 companies（2001 16 companies）

Actual Resulet and Possibility of vender sales

	2001	2002	2003	2004
Service	119.6	186.2	381.1	949
System	115.7	147.1	212.6	565
Content	107.3	121.7	145.2	223.5
total	342.6	455	738.9	1737.5

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Market size in Japan -user side-

(100mil.Yen)

Chart totals by year:
- 2003: 1699.6
- 2004: 2574.6
- 2005: 3488.4
- 2006: 4258.3
- 2007: 4902.7
- 2008: 5472.5
- 2009: 5985.3
- 2010: 6483.5

Values by category and year:

K-12 Education: 79.7 / 112.? / 148.1 / 183.6 / 215.2 / 240.4 / 258.4 / 269.7

Higher Education: 794.6 / 1069.5 / 1311.1 / 1472.2 / 1554.0 / 1626.1 / 1670.0 / 1736.5

Other Training School: 220.1 / 342.8 / 503.7 / 675.7 / 866.0 / 1017.0 / 1143.4 / 1228.2

Corporate Learning: 445.0 / 805.4 / 1209.1 / 1559.7 / 1869.5 / 2174.0 / 2490.1 / 2822.0

Life Long Education etc: 160.2 / 244.8 / 316.4 / 367.1 / 397.9 / 415.0 / 423.5 / 427.1

Legend:
- K-12 Education
- Higher Education
- Other Training School
- Corporate Learning
- Life Long Education etc

2003 2004 2005 2006 2007 2008 2009 2010 (年)

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System Vendor's Status towards e-Learning Standardization in Japan

◆Only one compliant company in March 2000.

◆By the end of December 2000, sixteen compliant companies enlisted, after the establishment of ALIC in April 2000 (approx. 70%)

◆Eighteen companies have announced to enlist by April 2002 according to the census taken on December 2001.

◆Press Release by eLC, October 2002
- ■22 platform products by 22 companies.
- ■18 authoring tools by 18 companies.
- ■735 content products by 18 companies.

ALIC established April 2000

AEN established July 2002

□ 準拠していない
■ 一部準拠
■ 完全準拠

Platform: 22 companies
Authoring: 15 companies
Contents: 18 companies

Platform: 13 companies
Authoring: 10 companies

2000年3月調査　2000年12月調査　2002年4月　2002年10月

*March 2000: Research by F-RIC
*December 2000: Research by ALIC
*April 2002: eLC Press Release, including future sales plan (announced December 2001)
*October 2002: eLC Press Release, including future sales plan (announced September 2002)

Compliant Standards
*March 2000: AICC
*December 2000: AICC or SCORM or
*April 2002: SCORM
*October 2002: SCORM

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Progress of Activities based on Each Standard in Japan

		Investigation and Research of Standards, International Contribution	Creation of the Guidelines	IPA Development Project Related to ALIC	Operation(Certification,Application)	Actual Production by Private Enterprises	Procurement of Government Agencies
Interoperability Committee	Teaching Materials (SCORM) (v.1.2) [WG1]	Complete the translation of the latest version. Consider the proposal of new standards	Guideline of v.1.0	Typical WBT(I,II), Compliant Module(I,II), Test Bed(I,II) LOM-SCORM Authoring Tool(I)	1)Participation in the seminars for people ADL accepts. 2)Committees and programs ELC approve. 3)Seminars to create compliant contents using ELC module. 4)Interoperability experiment	Platforms commercialized by 13 companies, Authoring tools commercialized by 10 companies	Procure or currently considering the procurement by government agencies such as Ministry of Economy,Trade and Industry.
	Structure of Teaching Materials (LOM v.6.0) [WG2]	Understood the details of the previous version. Propose the extension of standard.	Guideline of v.4.0 Version Upgrade	LOM Registration Tool· Search System LOM-SCORM Authoring (I)	Project of developing IPA-CEC graphical content materials (Consider best practice for CEC) (Best practice for other prganization) Project of developing IPA-CAIT IT materials.	Authoring tool commercialized by one company	Procure or currently considering the procurement by government agencies such as Ministry of Economy,Trade and Industry.
	Learner Information (LIP v.1.0) [WG2]	Understood the outline of the latest version	—	—	—		
	Testing (QTI v.1.2) [WG3]	The outline of v.1.01	—	—	—		
Advanced Technology Committee	Collaborative Learning (Collaborative Learning) [WG1]	Investigative Report, Proposal and Approval of 3 NPs. Move on to Next Step (WD)	—	Multiple collaborative learning systems based on each of NPs "CW "and "L2L". 2 practical collaborative learning systems.	—		

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Activities of ALIC

ALIC Activities in 2002

◆ Development
 ■ Prototype LMS/authoring tool including IMS SS draft spec. implementation
◆ Publication
 ■ e-learning white paper 2002/2003
 ■ SCORM1.3 working draft translation
 ■ Technical seminars
◆ Conformance
 ■ SCORM conformance test for LMS (with eLC)

ALIC Activities in 2003

◆ Publication
- e-learning white paper 2003/2004

◆ Three Committees
- Interoperability
  - ◆ Issues related to e-learning standards
    - Promotion, Testing, Conformance, New standards
- Advanced Technology
  - ◆ Issues mainly related to collaborative learning
    - Requirement and use cases, Architecture
- Content
  - ◆ Issues related to content design and quality
    - Instructional design, QA, Multilingual issue, etc.

Interoperability Committee

◆ Promotion
- Deal with IMS SS and SCORM1.3
- Specification translation, Tutorial
- Discussion towards new content specification

◆ Testing
- Deals with IMS QTI
- Specification translation, Use cases, Application

◆ Conformance (with eLC)
- SCORM conformance in cooperation with ADL

◆ New standards
- Focus on DRM and privacy policy

Requirements

◆ Promote the e-Learning Market by business model using standards
  - ■ Improvement of both interoperability of platform and contents and reusability of contents.
  - ■ Examination of the business model based on the employment management base which realizes continuous improvement
  - ■ According to the development stage of standards, it cooperates with an overseas related organization and standard creation, implementing, spreading and promotion, and authorization are carried out.

◆ The business model using next-generation technology
  - ■ Research of e-learning system of the next generation, contents, and service, and examination of a business model

◆ The professional who realizes the optimal effect
  - ■ E-learning professional training for collateralizing a setup and these quality of the quality standards towards the improvement in E-learning course quality
  - ■ Spreading and promotion to a user (inside of a company / school education), or a vender

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