e-Learning Trends in Japan

16 December 2004 NTT Resonant Inc. Yoshimi FUKUHARA









Various Statistics – Japan

Current situation and trends in Japan
Some might be used as a reference
Some might be a good lesson



Japanese e-Learning Market' vender









Market size in Japan -vender side-



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Market Size in Japan -user side-





e-Learning Adoption Rate

-Japanese Business Organizations, by Organizational Scale-



e-Learning White Paper 2004/2005





e-Learning Adoption Rate

-Japanese Business Organizations, by Category of Business-



Note: (n = valid response)

e-learning under review e-learning not adopted

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Source: Ministry of Economy, Trade and Industry *e-Learning White Paper 2004/2005*

What will be the trigger to adopt e-Learning?







What will be important in e-Learning business ?

-Answered by Japanese e-Learning Vendors-





What is the bottleneck in e-Learning business ?

-Answered by Japanese e-Learning Vendors-





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Evaluated

Effective

What is the effect in implementing e-learning?

-Answered by Japanese e-Learning user companies-



Making training more efficient (reduction in time taken, freedom in training location)

Making training more efficient (cost reduction) Improvement of participation and completion rates, expanding and increasing learning opportunities

Providing training programs appropriate to individual needs and levels

Supplementation of group training (preparation/review homogenization of learner levels)

Physical load reduction for personnel and training heads

Providing training when necessary for business development

Providing training programs directly relevant to business

Providing many training programs

Improvement of employees' training results (grades, rate of passing)

Improvement of employees' motivation

Satisfaction levels for employee training

Improving performance of learners or organization as a whole

Providing up-to-date training programs

Strategic development of human resource training which contributes to corporate performance

Coordination of training and administrative affairs

Simplification of personnel management (Understanding skills of the employee and area of specialty)

Others

Source: Ministry of Economy, Trade and Industry *e-Learning White Paper 2004/2005*

Comprehensive evaluations

What is the effect in implementing e-learning?



-Answered by Japanese e-Learning user companies-



Source:

Ministry of Economy, Trade and Industry *e-Learning White Paper 2004/2005*

■ Have effect ■ No effect

(n=69)



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How much of the educational/training budget

spent in e-learning ?

-Answered by Japanese e-Learning user companies-







Pros and Cons of e-Learning

-Answered by Japanese e-Learning users-



■ No e-Learning experience (n=413) ■ e-Learning experienced (n=222)



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merit

demerit

What is the challenge in e-learning based teaching ?

-Answered by Japanese higher education institutions-

Major challenges	% (multiple answer)
Insufficient budget for creation of course materials and system operations	85.7
Anxiety and difficulty regarding treatment of copyrights	81.8
Instructor or TA has insufficient skills to conduct e-learning classes	74.9
No way to reflect evaluations of bulletin board discussion in grades	70.9
Cannot obtain proactive cooperation from faculty	68.2
Cannot conduct enough training since experiment and practical training cannot be	66
incorporated	
Cannot sufficiently prepare TAs and other support personnel	62.3
Difficult to provide an environment equivalent to campuses to distance learning	61.2
students; e.g., libraries	
Difficult to obtain a consensus within departments regarding course material standards	56.8
Difficulty and anxiety regarding treatment of personal information over the Internet	56.5
Anxiety over dishonesty regarding tests or attendance, as it is difficult to determine the	54.9
identity of distance learners	
Managing learning progress for distance learners is difficult	48.3
Cannot offer courses that are attractive compared to face-to-face classes	46.5
Cannot provide communication band or facilities sufficient for establishing	46.1
communication	

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Source:

Ministry of Economy, Trade and Industry *e-Learning White Paper 2004/2005*



System Vendors' Status towards





Compliance status of e-learning systems

Source: Ministry of Economy, Trade and Industry *e-Learning White Paper* 2004/2005





Content Vendors' Status towards e-Learning Standardization in Japan



Compliance status of e-learning contents (ready-made and custom-made)

Similar compliance rate for both ready-made and custom-made contents



Compliance status of ready-made e-learning contents

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Compliance status of custom-made e-learning contents



			Investigation and Research of Standards, International Contribution	Creation of the Guidelines	IPA Development Project Related to ALIC	Operation(Certification,Applicati on)	Actual Production by Private Enterprises	Procurement of Government Agencies
Interoperability Committee	Interoperabilit	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)	 Participation in the seminars for people ADL accepts. Committees and programs ELC approve. Seminars to create compliant contents using ELC module. 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.
	y Committee	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	-	-	-		
Technology Committee	Advanced	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.	-		



e-Learning Markets, Trends, Policies in Japan 2000-2003



		2000	2001	2002	2003	
	Trend of users	 Rate of corporate employees experienced e-learning 	9.0%	18.0%	20.5%	
larket	Market size	First Generation, WBT	Second Generation, LMS) Third Generation, LCMS, Repository, Aggregator, Market Place	
Check	ology / Human Rea			Planning the business based on standards	Development of the business based on standards	
Heasures H	Business Model Human Resource	Following the	Studying LOM, quality assurance etc., one step forward from just following the standards. Promotion the standards from the user's point of view	Studying the skills of Instructional Designer	Fostering the Instructional Designer	
& Proje	Quality	standards like SCORM, LOM etc. Making guidelines for domestic use		Start certification of SCORM 1.2 based systems	Start certification of SCORM 1.2 based contents	
Action	Standards					
Poli	Learning Policy	man Resource Development				
TI	Related Policies	nfrastructure			AEN	

Conclusion



Based on and accordingly with the PDCA mentioned in the prior slide, Evaluation of e-Japan Strategy

The productivity of labor is said to have improved by IT. However, it is not fully exploited yet.

Implementation and the development of social system and environment to help driving forward the human resource development corresponding to IT, efficient use of human resource, and organizational reforms will be the strategy to cope with it.

Evaluation of learner

From the results of the 2003 ALIC user survey, 69.0% of learners in enterprise education answered that they want training using e-learning to increase.

Policies, measures and businesses that further urge the development of e-learning are strongly demanded, as long as the evaluation by both the learners themselves and government continues.

