

e-Learning Trends in Japan

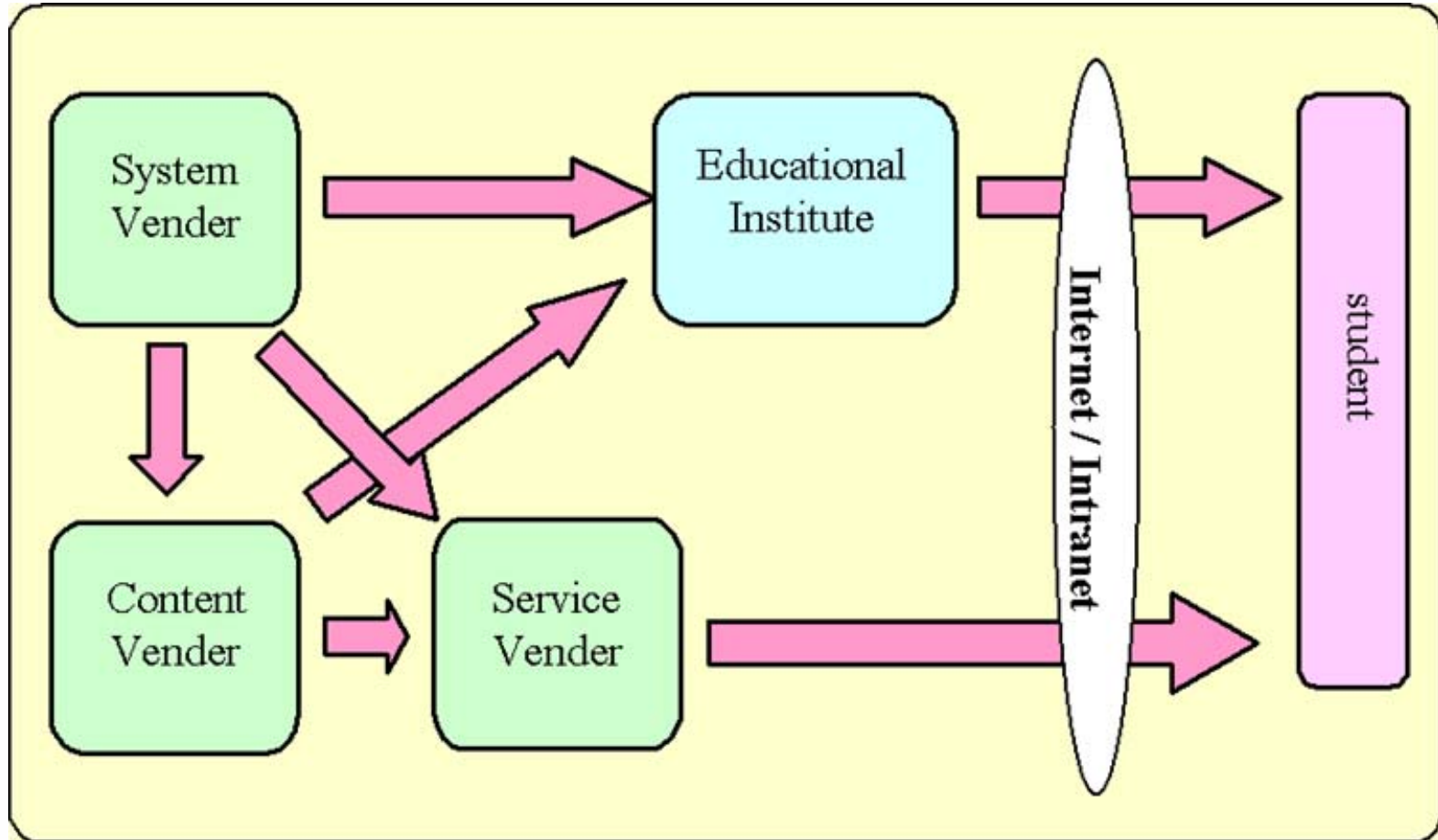
16 December 2004
NTT Resonant Inc.
Yoshimi FUKUHARA



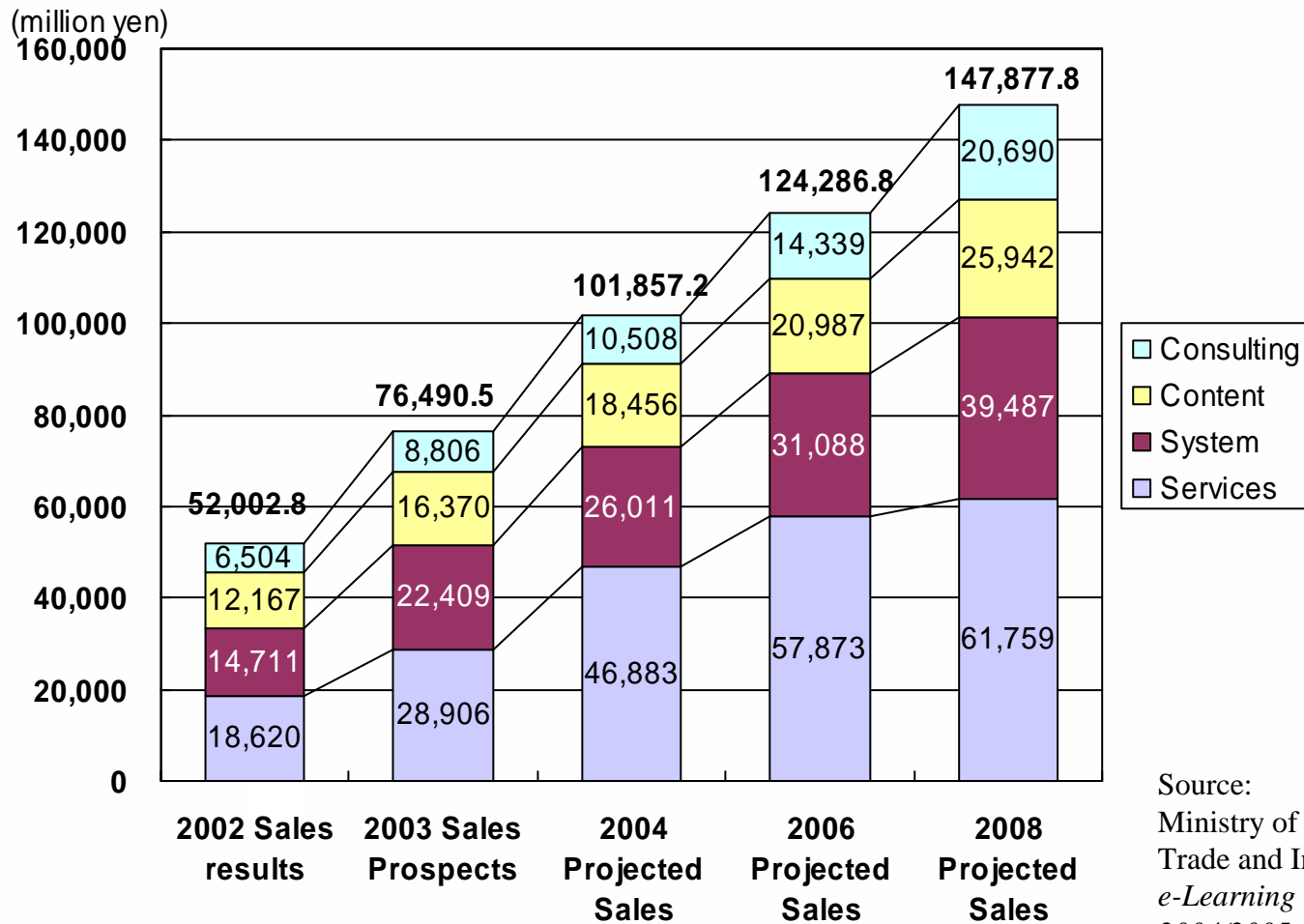
Various Statistics – Japan

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

Japanese e-Learning Market' vender



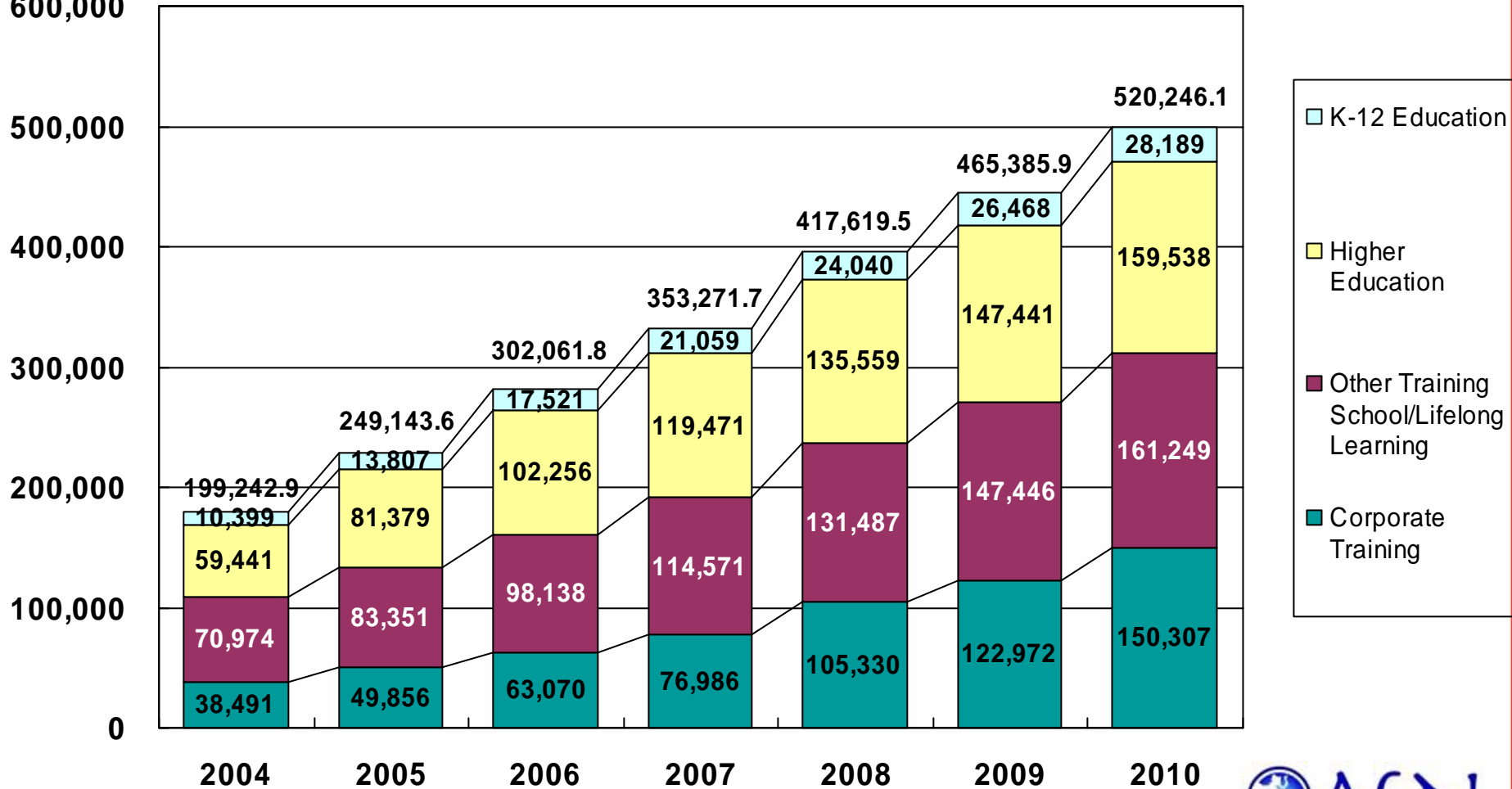
Market size in Japan -vender side-



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

Market Size in Japan -user side-

(million yen)
600,000



e-Learning Adoption Rate

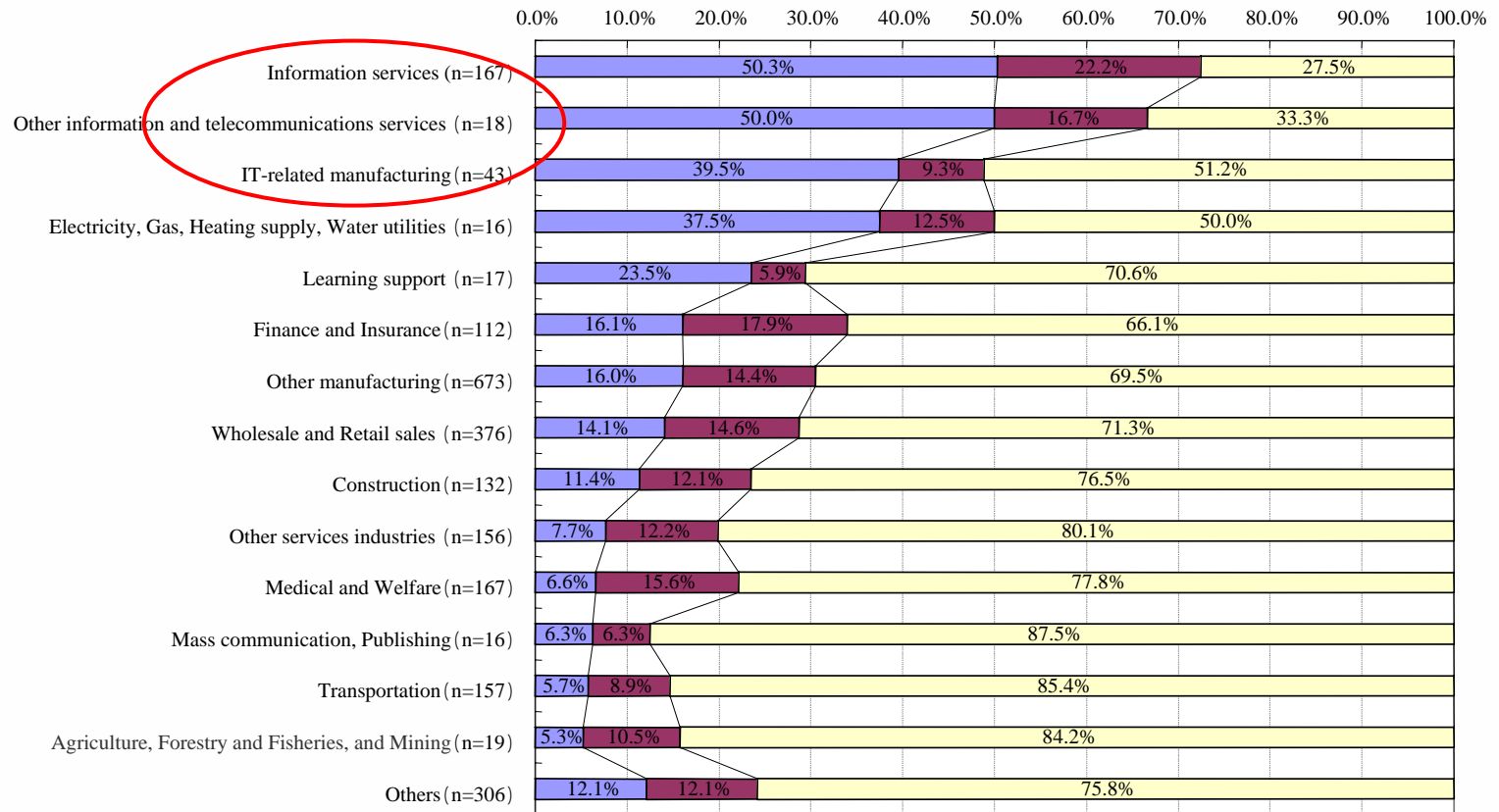
-Japanese Business Organizations, by Organizational Scale-



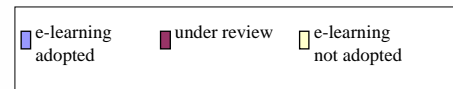
Source:
Ministry of Economy, Trade and Industry
e-Learning White Paper 2004/2005

e-Learning Adoption Rate

-Japanese Business Organizations, by Category of Business-



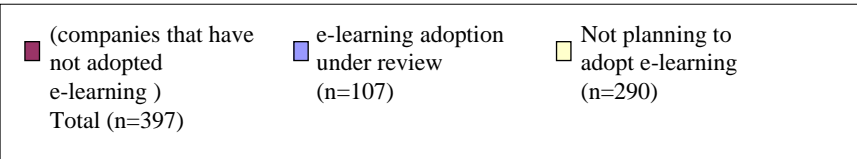
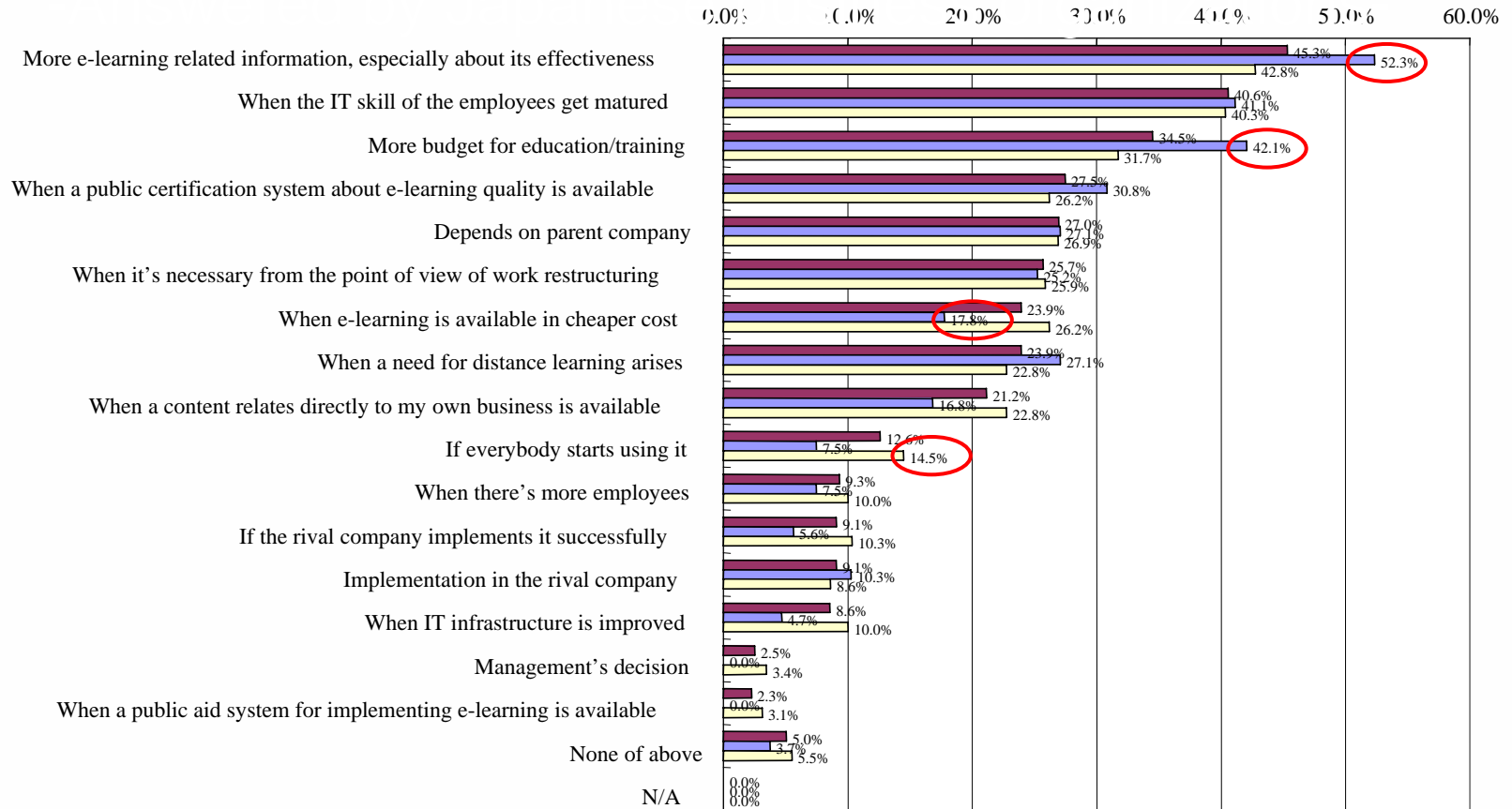
Note: (n = valid response)



Source:

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

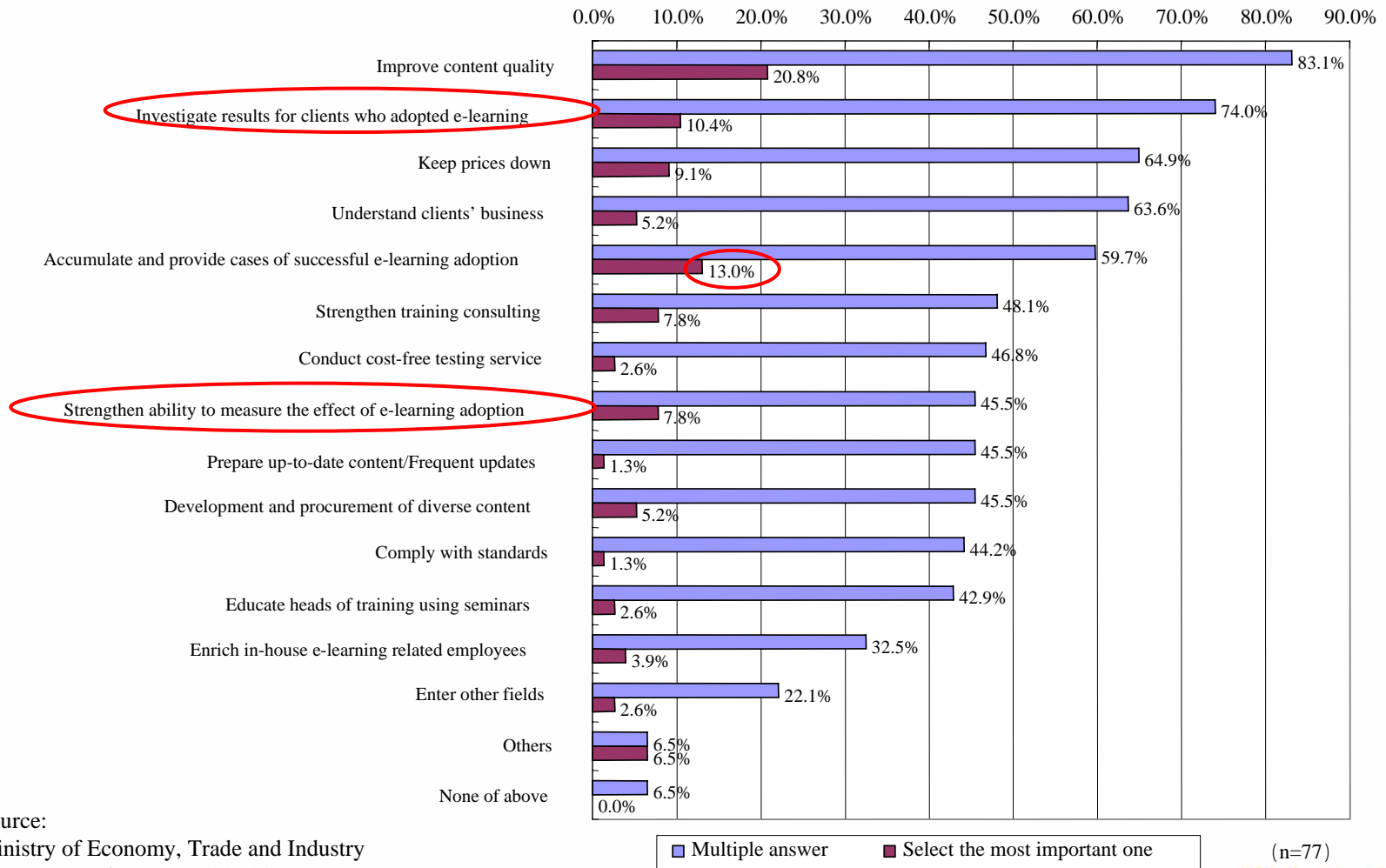
What will be the trigger to adopt e-Learning ?



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

What will be important in e-Learning business ?

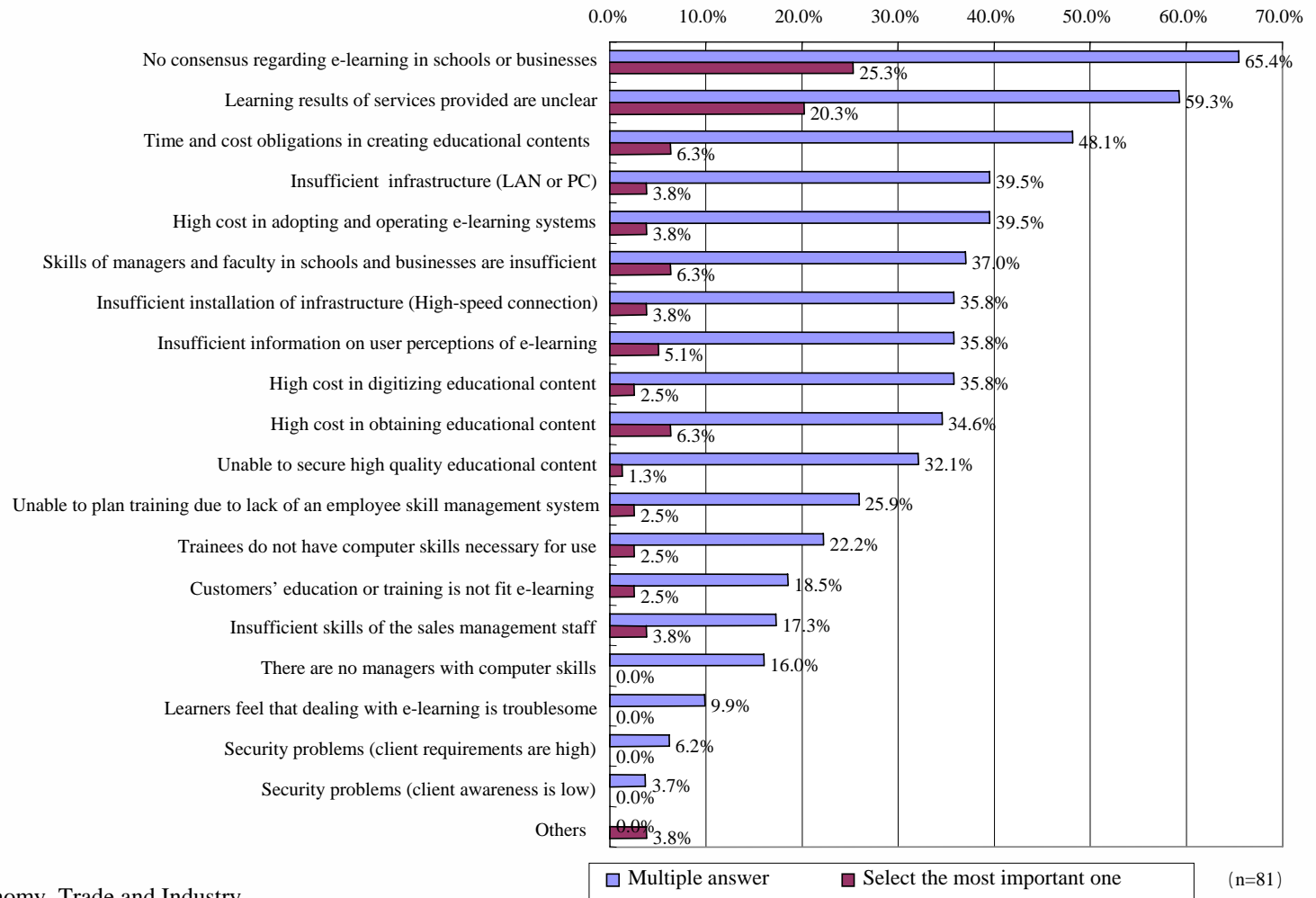
-Answered by Japanese e-Learning Vendors-



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

What is the bottleneck in e-Learning business ?

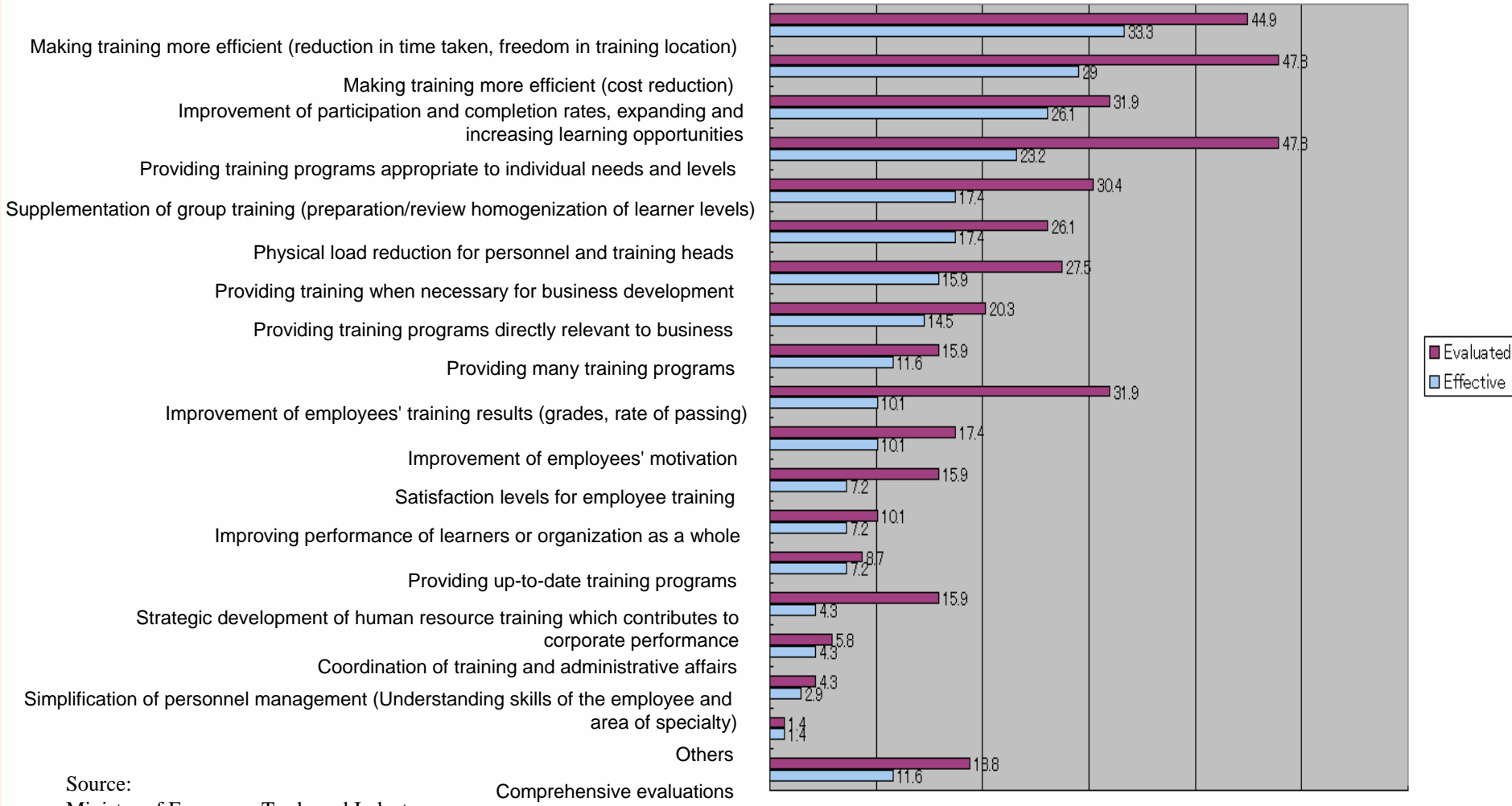
-Answered by Japanese e-Learning Vendors-



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

What is the effect in implementing e-learning ?

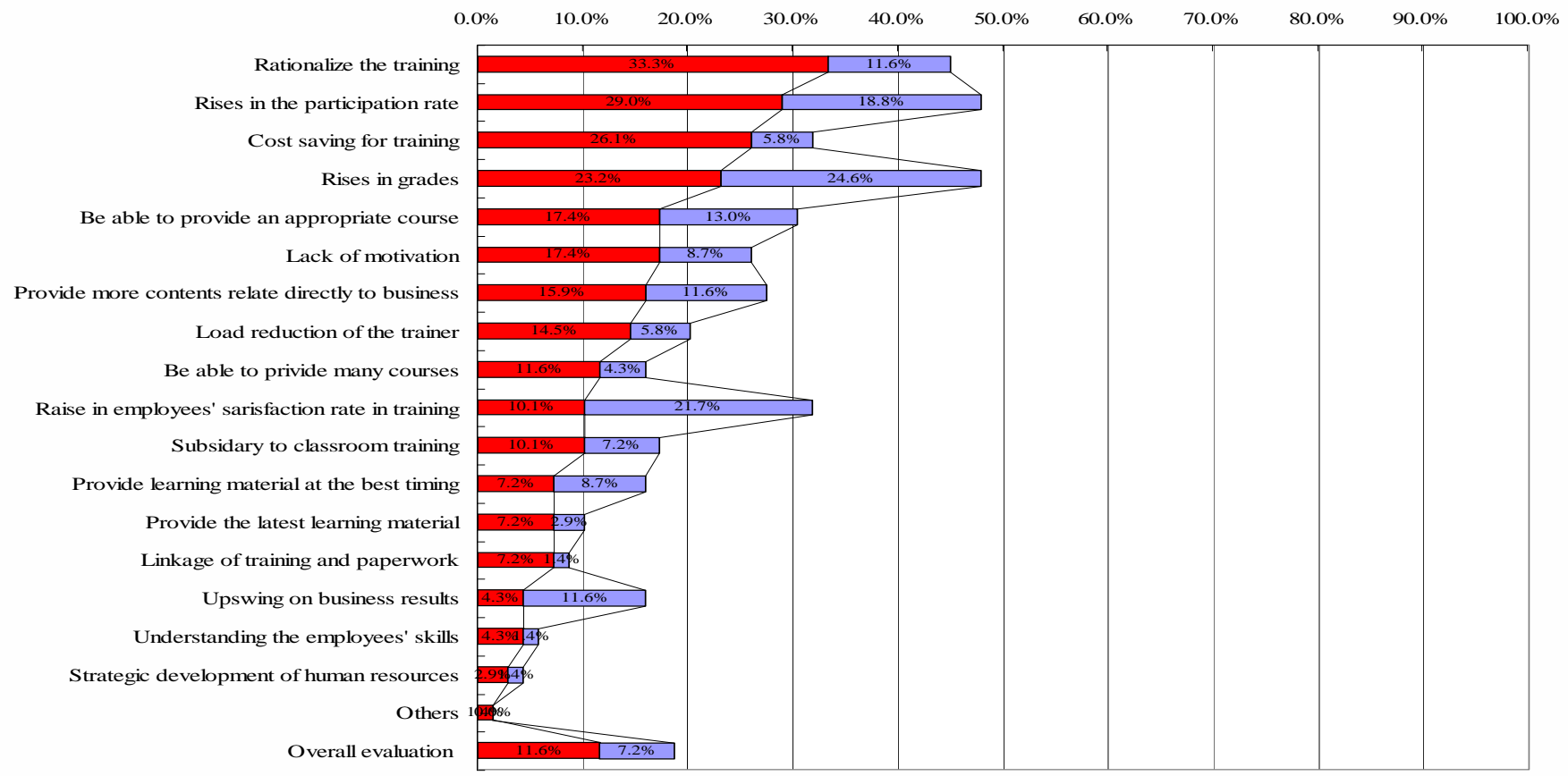
-Answered by Japanese e-Learning user companies-



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

What is the effect in implementing e-learning ?

-Answered by Japanese e-Learning user companies-



(n=69)

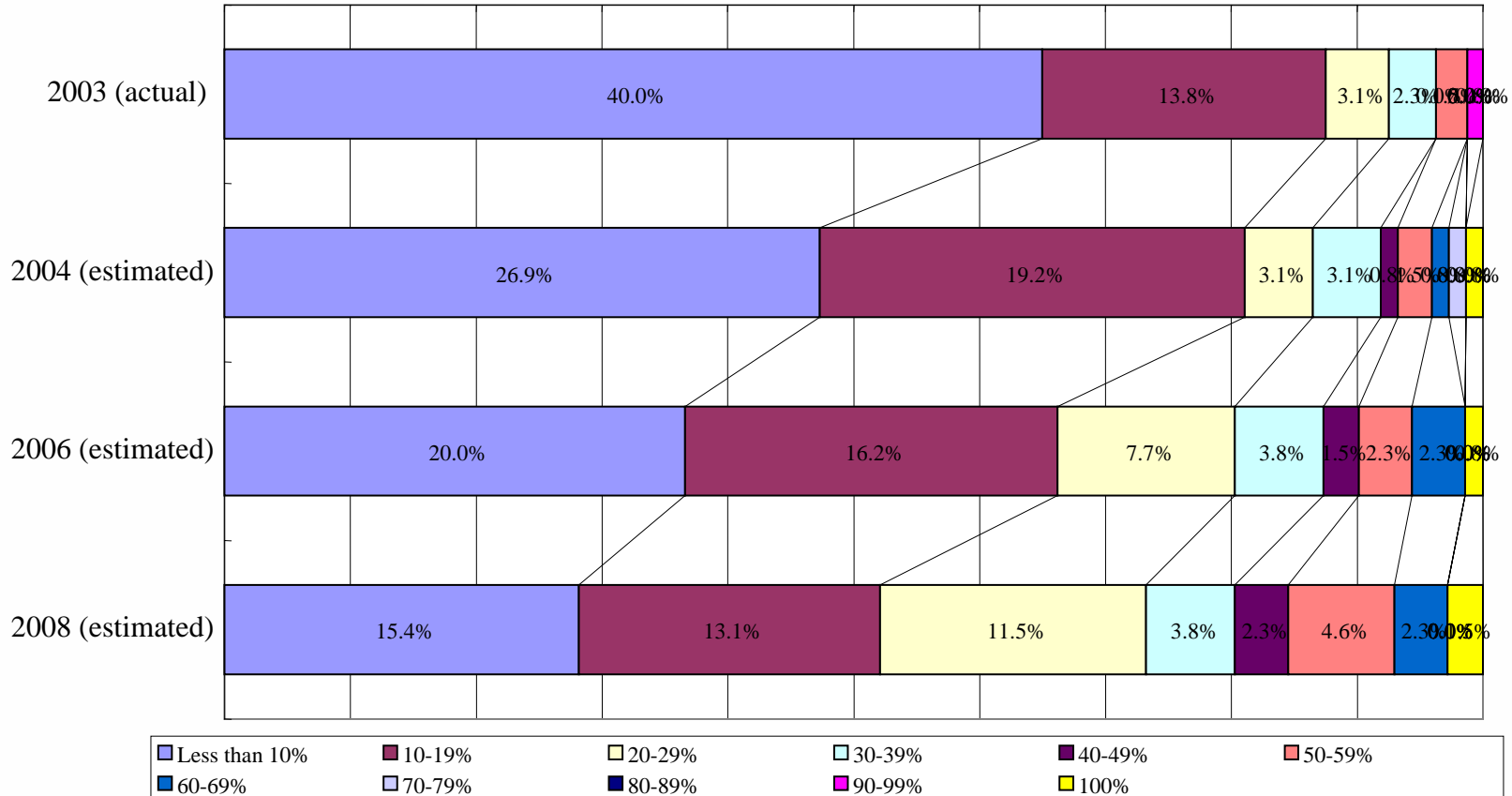
Source:
Ministry of Economy, Trade and Industry
e-Learning White Paper 2004/2005

■ Have effect ■ No effect

How much of the educational/training budget

spent in e-learning ?

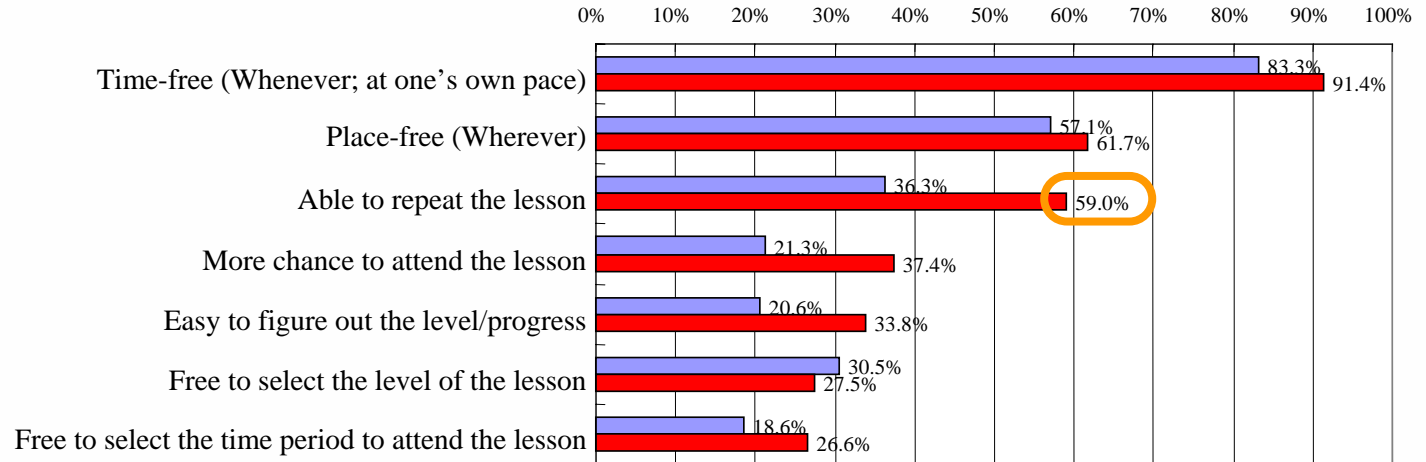
-Answered by Japanese e-Learning user companies-



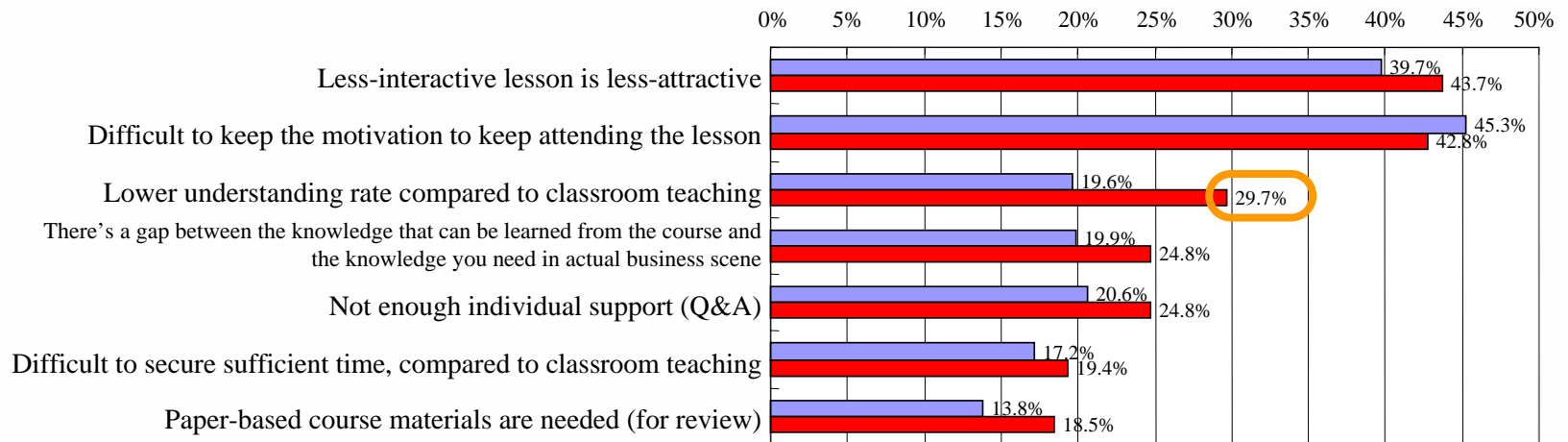
Pros and Cons of e-Learning

-Answered by Japanese e-Learning users-

merit



demerit



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

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 incorporated	66
Cannot sufficiently prepare TAs and other support personnel	62.3
Difficult to provide an environment equivalent to campuses to distance learning students; e.g., libraries	61.2
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 identity of distance learners	54.9
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 communication	46.1

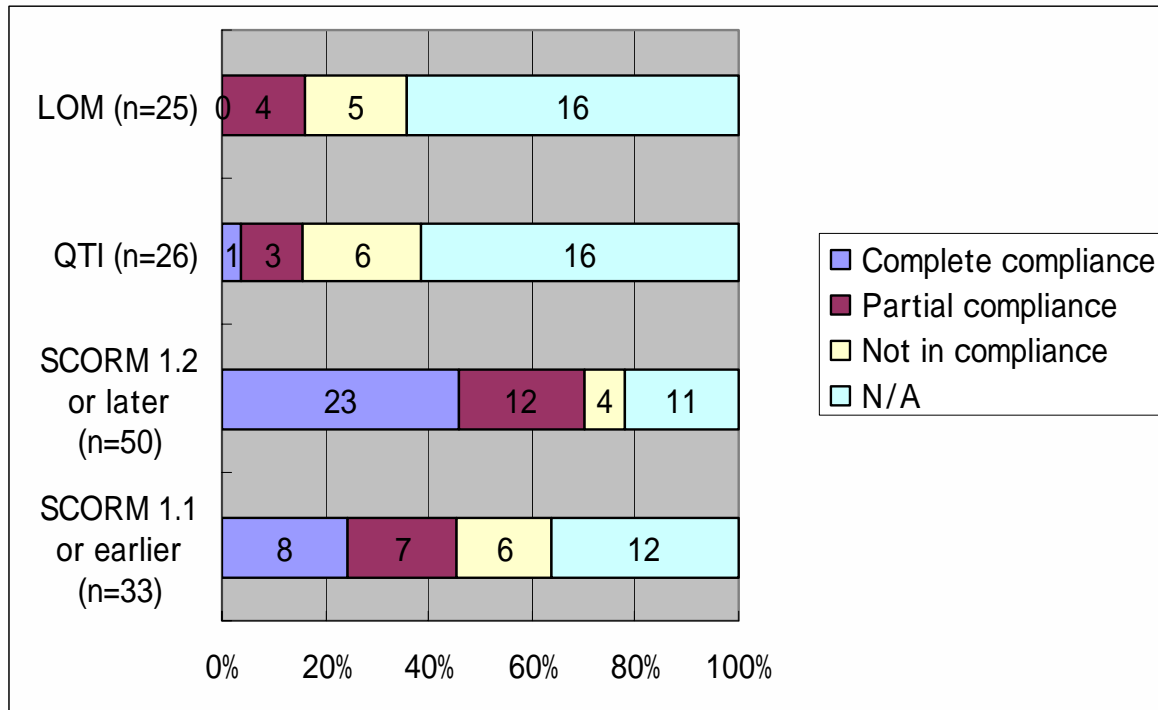
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e-Learning White Paper 2004/2005

System Vendors' Status towards

Compliance status of e-learning systems

■ Relatively high rate of SCORM compliance

Compliance status of e-learning systems



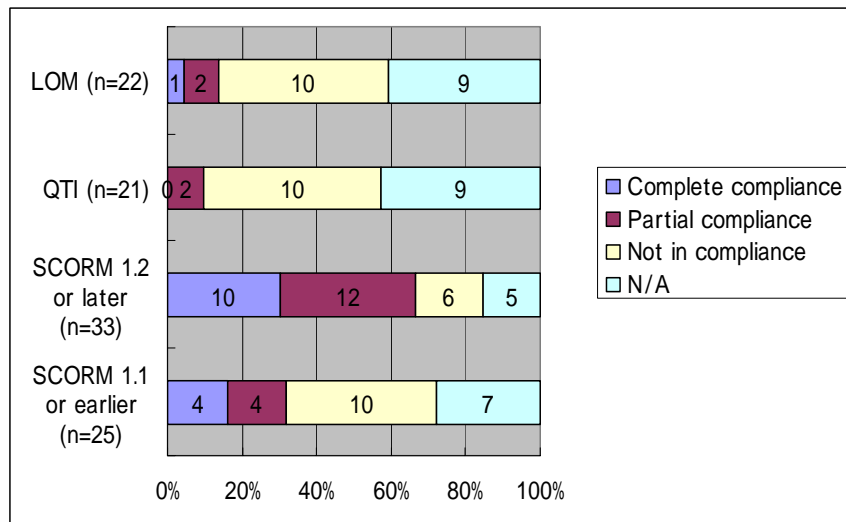
Source:
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and Industry
e-Learning White Paper
2004/2005

Content Vendors' Status towards e-Learning Standardization in Japan

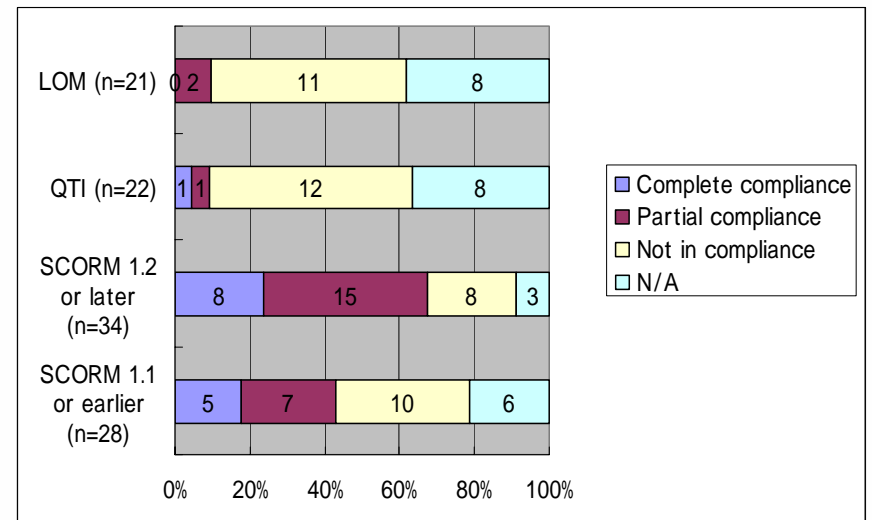
Compliance status of e-learning contents (ready-made and custom-made)

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

Compliance status of ready-made e-learning contents



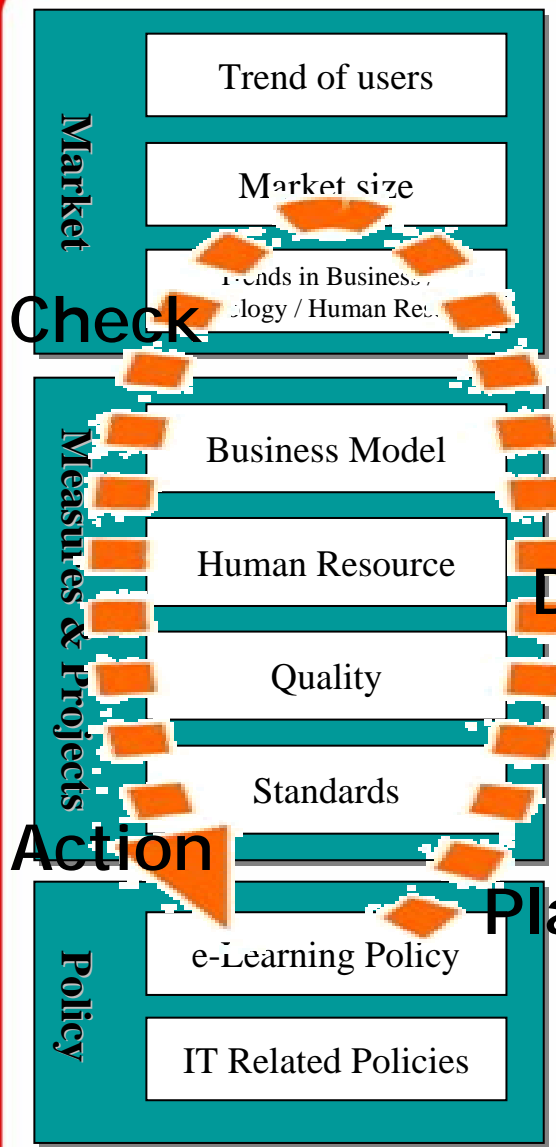
Compliance status of custom-made e-learning contents



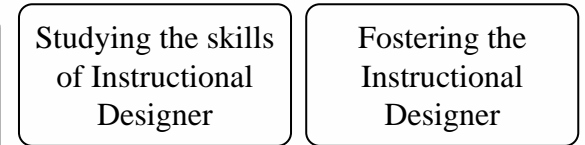
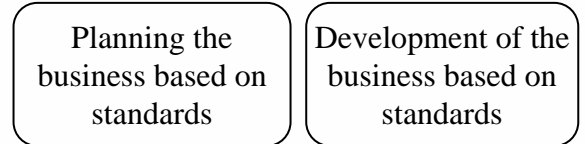
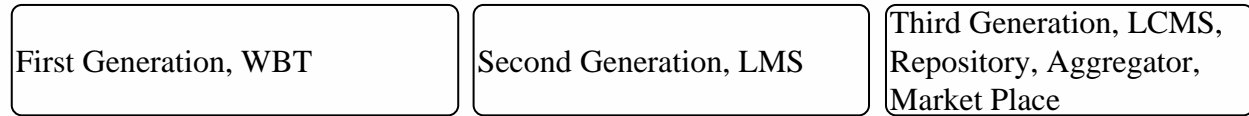
Progress of Activities based on Each Standard in Japan

		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 organization) 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.	-		

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



	2000	2001	2002	2003
Rate of corporate employees experienced e-learning		9.0%	18.0%	20.5%

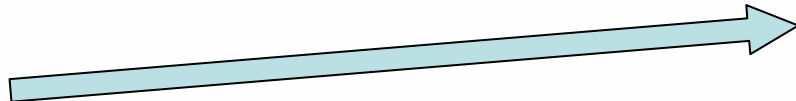


Studying LOM, quality assurance etc., one step forward from just following the standards. Promotion the standards from the user's point of view

Following the 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



Conclusion

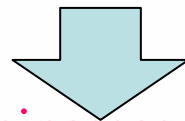
Based on and accordingly with the PDCA mentioned in the prior slide,
Evaluation of e-Japan Strategy

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.