

**Survey on the Organization and Functions of Education and Training Providers: the
Second Survey on the Education and Training Service Market**

Summary

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Objective and Purpose of the Survey and Research

One of the important management challenges for Japanese companies, which must adopt a high value-added management style to survive the fierce international competition, is the “development and accumulation of human resources with high-level vocational abilities,” in other words, the development of solid education and training systems. On the other hand, individual workers must also take the initiative in developing their skills and careers in response to the changing employment environment and the shift in firms’ personnel management policies.

These needs necessitate a social infrastructure for supporting companies and individuals in their effort in human resource development. In promoting a policy for building such a social infrastructure, it is important that the government has an accurate understanding of how education and training services are being provided and what kinds of services are in demand in the labor market. In other words, it must have a correct grasp of the market for education and training services (hereafter called the “education and training service market”).

Based on this awareness of the issues concerned, we launched this research project, which is titled, “Research on Building a Labor Market Infrastructure for Human Resource Development” (a three-year project that runs from fiscal year 2004 to 2006), and set down the following work guidelines with the purpose of elucidating the

characteristics of the education and training service market:

- (1) Clarify the amount and quality of education and training services that are being provided and needed in the labor market (in other words, the actual state of the education and training service market).
- (2) Clarify the supply and demand structures of the education and training service market.
- (3) Based on the outcomes of (1) and (2) above, evaluate the current state of the education and training service market and identify policy issues.

Prior to the launch of this project, we made an analysis of the education and training service market from existing statistical surveys¹ in fiscal year 2003, and compiled the outcomes in a discussion paper (“Research on Building a Labor Market Infrastructure for Human Resource Development: State of Provision of Education and Training for Human Resource Development,” *JILPT Discussion Paper Series 04-006*, May 2004).

For the above analysis, we developed an analytical framework of the education and training service market (see Figure 1) and elucidated (I) the number of education and training providers,² composition of the providers by type of organization, and characteristics of each type of organization; (II) the costs borne by the government and private firms, which are the consumers of the education and training services; and (III) the quantitative and qualitative structures of the services as observed through revenues,

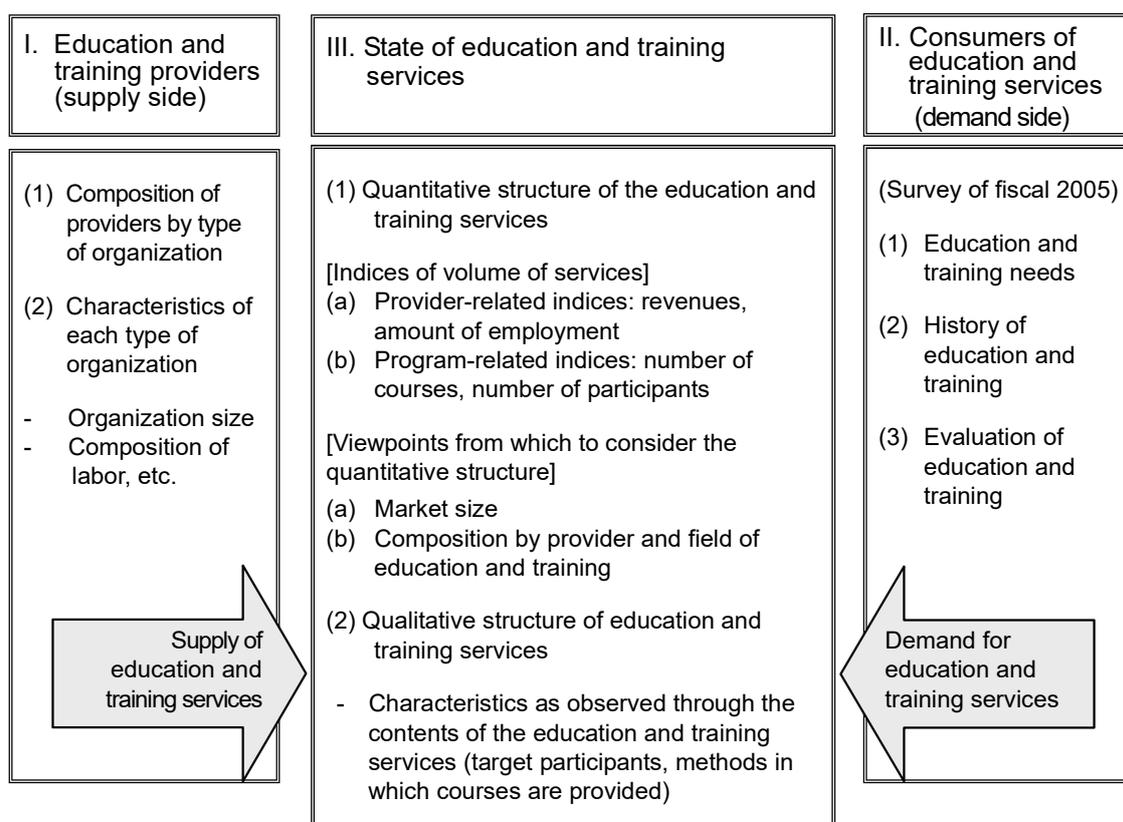
¹ Statistics Bureau, the Ministry of Internal Affairs and Communications (2003), *Establishment and Enterprise Census 2001* and *Labour Force Survey*; Statistics and Information Department, the Ministry of Health, Labour and Welfare (2003), *General Survey on Working Conditions 2002*; Human Resources Development Bureau (2002), *Basic Survey on Human Resources Development 2001*; Human Resources Development Bureau (2003), *Basic Survey on Human Resources Development 2002*; the website of Lifelong Human Resources Development Center, Employment and Human Resources Development Organization of Japan; the Japan Institute of Labour (1996), “Organization and Business of Private Educational Institutions” (JIL Research Report No. 87); and the Japan Institute of Labour (1998), “History of Education and Training and Their Training Needs in Companies” (JIL Research Report No. 108).

² For the purpose of this report, the organizations that provide education and training are called the “education and training providers.” In this report, the providers are broadly categorized into “universities,” “vocational schools,” “private firms,” “public corporations,” “employers’ associations,” and “vocational training corporations.” “Universities” include universities and colleges, junior colleges, and technical colleges. “Vocational schools” include special vocational schools (*senshu gakkō*) and other vocational schools (*kakushu gakkō*). “Private firms” are joint-stock corporations, limited-liability companies, limited partnerships, and unlimited partnerships. “Public-interest corporations” are incorporated foundations and associations. “Employers’ associations” include chambers of commerce and industry, commerce associations, cooperatives, and commercial and industrial associations. “Vocational training corporations” include Japan Vocational Ability Development Association, prefectural vocational ability development associations, and private organizations neither controlled nor protected by the law, in addition to vocational training corporations.

etc. and through duration and contents of education and training courses, respectively.

While we were able to elucidate some of the characteristics of the education and training service market through the above analysis, it did not go beyond a general survey as it was based only on existing statistical materials. Therefore, in this research project kicked off in the fiscal 2004, we conducted two detailed surveys with the goal of understanding the market characteristics from the supply side.

Figure 1. Viewpoints to Look at the Education and Training Service Market



Based on the “Viewpoints to Look at the Education and Training Service Market” (Figure 1), which were developed in the abovementioned discussion paper, we elucidated in our first survey the characteristics of each type of education and training providers ((I) in Figure 1) and the quantitative structure of the education and training service market ((III)-(1) in Figure 1) in terms of “which types of providers are providing how much services in which fields.” The outcomes were reported in the JILPT Research Report No. 24, *Survey on the Organization and Functions of Education and Training Providers: the First Survey on the Education and Training Service Market* (the Japan Institute for Labour Policy and Training, 2005).

The second survey clarifies the “qualitative structure” of the education and training

service market ((III)-(2) in Figure 1), the results of which are contained in this report, as well as complementing the findings of the first survey on the “quantitative structure” of the education and training service market. More specifically, we carried out our survey and analysis to find out “the fields in which the courses specialized” (the contents of the courses), “the participants for whom the courses were intended” (the participants’ attributes such as age, occupation, position), and “the methods in which the courses were provided” (duration, frequency, tuition).

For the fiscal year 2005, we are currently conducting a survey and research on individuals to gain a further grasp of the characteristics of the education and training service market from the demand-side perspective ((II) in Figure 1). The objective of the current survey is to further elucidate the characteristics of the market by investigating on the demand for education and training services in terms of who require the services and for what purposes (education and training needs), what kinds of services are in demand (history of services’ consumption), and how the services are evaluated (education and training evaluation).

Outline of the Survey Results

1. Survey method, period, and collection of questionnaires

(1) Survey method and questions

For the second survey, we mailed questionnaires to 1,939 organizations that had replied, in the first survey, that they provided education and training for the working people, and asked them to fill in and return the questionnaires. The main questions of the survey were as follows:

- (1) Management (organizational) structure and personnel structure
- (2) Fields of specialization of their educational business (workshops, seminars, and correspondence courses), length of the courses, the number of times a same course is held in a year, tuition, participants’ attributes, total number of participants in a year, the percentage of participants paying for their education and training
- (3) Departments offering graduate-school education (master’s course) for working people, the number of years required to complete the courses, the total amount of costs borne by the working people taking the courses, characteristics and the total number of the working people taking the courses, the percentage of working people dispatched from their firms

(2) Period of survey

The questionnaires were sent in early November 2005 and collected in mid-December 2005.

(3) Collection of questionnaires

The questionnaires were mailed to 1,939 organizations, of which 1,181 were returned as effective responses. The effective response rate was 60.9 percent.

2. Structure of the education and training service market in terms of “to whom” and “how” the services are provided

(1) Delineating the structure of the education and training service market

1) Market structure in terms of target participants

This survey deals with three types of education and training, namely, workshops and seminars, correspondence courses, and graduate-school education for working people. Here, we focus primarily on workshops and seminars, which make up the bulk of education and training services, and touch briefly on correspondence courses and graduate-school education for working people.

A. Target participants of workshops and seminars

Figure 2 shows the attributes of the participants with respect to their age, employment pattern, and position within the job hierarchy.

Looking at the column under “All courses,” we see that courses provided by education and training providers’ are designed mainly for those in their 30s and 40s with respect to age, for office workers in small- and medium-sized firms, self-employed people, and freelance professionals as regards occupation, and for those in the positions between new recruits and chief clerks and supervisors with a particular focus on mid-level employees.

By the training field, the characteristics are that the training for new recruits, under the category of training for specific groups within the hierarchy, is provided to youths in their 20s, and that specialized training in accounting and finance, personnel and labor affairs, and quality control and industrial safety is also provided to those in their 50s. This shows that since office workers in small- and medium-sized firms, among the different types of employees,³ are the principal target of workshops and seminars, education and training providers offer a variety of courses tailored to different stages of careers of office workers in small- and medium-sized firms, and a market for this purpose has come to be established.

³ For the purpose of this report, employees are hereafter defined as office workers of large and small- and medium-sized firms, civil servants, and regular employees and administrative staff of associations.

Figure 2. Attributes of the Main Participants of Workshops and Seminars

Attributes of main participants (for whom the courses are intended)	All courses	Training for specific groups within the hierarchy	Specialized training	Training for acquiring qualification	OA and computer training	Language training	Hobby and culture
Age							
20s		<input type="radio"/>		<input type="radio"/>			
30s	<input checked="" type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
40s	<input checked="" type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
50s	<input type="radio"/>						
60s							
None of the above						<input type="radio"/>	<input type="radio"/>
Employment status							
Office workers in large firms							
Office workers in small- and medium-sized firms	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Civil servants and association staff							
Self-employed and freelance professionals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Part-timers and <i>arubaito</i>							
Homemakers and students							
Unemployed					<input type="radio"/>		
None of the above							<input type="radio"/>
Position within the job hierarchy							
New recruits(A)		<input type="radio"/>					
New recruits(B)	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Mid-level employees	<input checked="" type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Chief clerks and supervisors	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>			
Section heads							
Division managers and deputy managers							
Senior executives and directors							
None of the above							<input type="radio"/>

Note: The '○' indicates the main attributes of the participants, and '⊙' the most common attributes of the participants.

Attributes of main participants (for whom the courses are intended)	Training for specific groups within the hierarchy		Specialized training						
	Training for new recruits	Management training	Manners	Sales	Technology and Skills	Medical care, nursing, welfare	Accounting and finance	Personnel and labor affairs	Quality control and industrial safety
Age									
20s	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			<input type="radio"/>
30s				<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			<input type="radio"/>
40s		<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
50s							<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
60s									
None of the above									
Employment status									
Office workers in large firms									
Office workers in small- and medium-sized firms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Civil servants and association staff						<input type="radio"/>			
Self-employed and freelance professionals		<input type="radio"/>		<input type="radio"/>			<input type="radio"/>		
Part-timers and <i>arubaito</i>									
Homemakers and students									
Unemployed									
None of the above									
Position within the job hierarchy									
New recruits(A)	<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
New recruits(B)			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mid-level employees		<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chief clerks and supervisors		<input type="radio"/>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Section heads		<input type="radio"/>		<input type="radio"/>				<input type="radio"/>	<input type="radio"/>
Division managers and deputy managers		<input type="radio"/>						<input type="radio"/>	
Senior executives and directors		<input type="radio"/>					<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
None of the above									

Note: In the column of the "Position within the job hierarchy," the "New recruits(A)" at the top are those in the first year of employment, and the "New recruits(B)" second from the top are those in the second or third year of employment.

Moreover, different types of education and training providers offer courses for different types of participants as shown in Figure 3. With respect to the age of participants, there is little difference among the different types of providers, but with respect to employment status and position within the job hierarchy, there are significant differences as to “for whom” the courses are generally intended.

Figure 3. Participants for Whom Workshops and Seminars Provided by Providers are Mainly Intended

For whom the courses are mainly intended	Private firms	Public-interest corporations	Employers' associations	Vocational training corporations	Vocational schools	Universities
Age						
20s	○	○	○	○	○	
30s	○	○	○	○	○	
40s	○	○	○	○	○	
50s	○	○	○	○	○	
60s			○			
None of the above						○
Employment status						
Office workers in large firms	○	○				
Office workers in small- and medium-sized firms	◎	◎	○	○		
Civil servants and association staff	○	○				
Self-employed and freelance professionals			○	○		
Part-timers and <i>arubaito</i>						
Homemakers and students					○	
Unemployed					○	
None of the above						○
Position within the job hierarchy						
New recruits (first year)				○	○	
New recruits (second or third year)	○	○		○	○	
Mid-level employees	◎	◎	○	○	○	
Chief clerks and supervisors	○	○				
Section heads						
Division managers and deputy managers						
Senior executives and directors			○			
None of the above						○

Note: The '○' indicates the main attributes of the participants for whom the courses are intended, and '◎' the most common attributes of the participants.

B. Target participants of correspondence courses

The characteristics of participants in correspondence courses, regardless of the field of education and training, are as follows:

- (1) In terms of age, they are mainly in their 20s, 30s and 40s but concentrated particularly on 30s and 40s.
- (2) In terms of employment status, they are mainly office workers in small- and medium-sized private firms.
- (3) In terms of position within the job hierarchy, they are mainly in positions between new recruits and chief clerks and supervisors, particularly mid-level employees.

With respect to the type of target participants, the four types of providers (i.e. private firms, public-interest corporations, employers' associations, and vocational training corporations) that provide education and training mainly to employees differ from schools (i.e. vocational schools and universities).

If we look at the results of an analysis on employment status and employees' position within the job hierarchy, we find that schools do not set specific targets, while other four types of providers have the following characteristics:

- (1) In terms of employment status, their common target is mainly office workers of small- and medium-sized firms. In addition, private firms have widened their target to include office workers of large firms, public-interest corporations to include office workers of large firms, civil servants, and association staff, and vocational training corporations to include self-employed people and freelance professionals.
- (2) In terms of position within the job hierarchy, the main target is generally mid-level employees. Moreover, private firms, public-interest corporations, and employers' associations have each widened their target to include chief clerks, supervisors, managers, and senior executives.

C. Target participants of courses offered by graduate schools

As for the characteristics of working people who take courses offered by graduate schools, (1) they are mainly in their 30s and 40s, and (2) in terms of occupation, they are mainly office workers of private firms, civil servants, and association staff members.

2) Market structure in terms of methods in which courses are provided

A. Characteristics of the methods by types of courses provided in workshops and seminars

We examine the methods in which the courses are provided in terms of "the length and costs of the courses" and "the number of participants in the courses." As for the

length of the courses, training for acquiring qualification, technology and skill training, training in medical care, nursing and welfare, and OA and computer training are provided through long term courses of over 50 hours. On the other hand, training in sales, training in manners, training for specific groups within the hierarchy (training for new recruits and management training for improving managerial skills), training in personnel and labor affairs, and training in quality control and industrial safety are short term courses of less than 20 hours. Language training and training in accounting and finance are in between.

The length of the courses generally determines the tuition, which tends to rise with longer term courses. By type of courses, the average hourly tuition is from ¥1,000 to ¥2,000, but it rises to between ¥3,000 and ¥4,000 for courses provided for management training and other management-related training, such as training in personnel and labor affairs and quality control and industrial safety.

In terms of the number of participants in the courses, the total number of participants in a course over a year is around 100 people on average. Training for acquiring qualification, technology and skill training, training in medical care, nursing and welfare, and training in personnel and labor affairs are provided on a larger scale of around 200 participants per course over a year. Training for new recruits, training in manners, OA and computer training, and language training, on the other hand, are provided on a smaller scale. As for the average number of participants in each session of a course, the number is around 30.

B. Characteristics of the methods by types of providers offering courses in workshops and seminars

If we examine the different types of education and training providers with regard to “the length and costs of the courses” and “the number of participants in the courses,” we can summarize the characteristics in which private firms, public-interest corporations, employers’ associations, and vocational training corporations provide education and training in workshops and seminars, which are held mainly for employees, as follows:

- (1) Private firms offer courses for small groups at high hourly tuition.
- (2) Vocational training corporations offer long term courses for small groups at low hourly tuition.
- (3) Public-interest corporations offer courses for large groups at average tuition.
- (4) Employers’ associations offer short term courses for small groups at average tuition.

C. Characteristics of the methods in which correspondence courses are provided

If we examine the characteristics of correspondence courses in different fields as regards “the length and costs of the courses,” the average tuition for six months is ¥76,000. The types of courses arranged in ascending order as regard the length of the courses are language training, training for specific groups within the hierarchy, specialized training, and training for acquiring qualification. The tuition and unit price (monthly tuition) also rise as the length of the courses becomes longer.

By type of providers, many types of providers offer correspondence courses that last from four to five months, but vocational training corporations and vocational schools offer longer courses lasting about a year. The tuition is not necessarily determined by the length of the courses. Among the four types of providers that offer courses lasting four to five months, universities’ correspondence courses are inexpensive (unit price of around ¥3,000), while private firms’ and vocational schools’ courses are expensive (unit price of around ¥16,000). Public-interest corporations, employers’ associations, and vocational training corporations are in between with the unit price of around ¥8,000 to ¥9,000.

E. Characteristics of the methods in which graduate-school education is offered to working people

Graduate-school programs for working people are offered for the duration of two years. The costs of the programs are about ¥2 million on average.

3) Overall structure of the education and training service market

A. As observed in relation to the characteristics of those for whom the courses are intended

We have so far examined the structure of the education and training service market from the viewpoint of “for whom the services are intended” and “how the services are provided” with regard to workshops and seminars, correspondence courses, and graduate-school courses for working people.

In this section, we integrate the results obtained above and present the overall structure of the education and training service market. Firstly, on the positions of different types of courses with respect to “for whom the courses are intended” (see “Position of courses” in Figure 4), we find that workshops and seminars are provided mainly for office workers of small- and medium-sized firms. Moreover, four groups of courses, namely, (1) training for new recruits and training in manners, (2) technology

and skills training, training for acquiring qualification, and training in medical care, nursing and welfare, (3) training in quality control and industrial safety and training in sales, and (4) training in personnel and labor affairs, management training, and training in accounting and finance are provided for different stages of employees' careers in small- and medium-sized firms. Furthermore, management training, training for acquiring qualification, training in sales, and training in accounting and finance are also offered to self-employed people and freelance professionals. As for correspondence courses, they are provided mainly to office workers of small- and medium-sized firms and of large firms. In terms of position within the job hierarchy, they are focused primarily on employees in positions between new recruits and chief clerks and supervisors.

Secondly, on the positions of different types of providers (see "Position of providers" in Figure 4), we see that, for workshops and seminars, public-interest corporations and private firms are in a position of providing services to all employees in the positions between new recruits and chief clerks and supervisors with a particular focus on mid-level employees of small- and medium-sized firms. Vocational training corporations and employers' associations also focus on mid-level employees of small- and medium-sized firms but have widened their target to include self-employed people and freelance professionals. As for correspondence courses, the targets are fairly similar to those of workshops and seminars, but they differ in that employers' associations regard managers and senior executives of small- and medium-sized firms as important targets. As graduate-school courses for working people are mainly intended for people in their 30s and 40s and for office workers of private firms, civil servants, and association staff members, it is conceivable that the courses' main targets are employees in upper positions of the job hierarchy (in other words, mid-level employees, chief clerks, and supervisors).

Figure 4. The Positions of Courses and Providers as Observed in Relation to for Whom the Courses are Intended

Job hierarchy	Position of courses						Position of providers					
	Senior executives Directors	Managers	Chief clerks Supervisors	Mid-level employees	New recruits (second or third year)	New recruits (first year)	Senior executives Directors	Managers	Chief clerks Supervisors	Mid-level employees	New recruits (second or third year)	New recruits (first year)
Office workers of large firms									Private firms Public-interest corporations			
Office workers of small- and medium-sized firms	Correspondence course					Training for new recruits			Private firms Public-interest corporations			
	Workshop and seminar					Training in manners			Private firms Public-interest corporations			
						Training in medical care, nursing, welfare			Employers' associations			
						Technology and Skill training Training for acquiring qualification			Private firms and public-interest corporations Correspondence course			
Civil servants and Association staff						Training in quality control and industrial safety			Private firms and public-interest corporations Workshop and seminar			
						Training in sales Training in accounting and finance Training in personnel and labor affairs Management training						
Self-employed and Freelance professionals						Training in medical care, nursing, welfare						
						Training for acquiring qualification			Employers' associations			
						Training in accounting and finance						
						Training in sales Management training			Vocational training corporations Vocational training corporations			

Note: The box of the "training in accounting and finance" is dotted because managers are not included in the main target

B. As observed in relation to the characteristics of how the services are provided

From the viewpoint of “how the services are provided,” the structure of the education and training service market can be illustrated as shown in Figure 5.

If we look at the “Position of courses” in Figure 5, workshops and seminars are mostly under 70 hours in length and priced at less than ¥80,000. Main courses include (1) training for acquiring qualification, technology and skill training, and training in medical care, nursing, and welfare (long term courses in the high price range), (2) training for new recruits and training in manners (short term courses in the low price range), and (3) management training, training in quality control and industrial safety, and training in personnel and labor affairs (management training, in particular, is short term but is in a relatively high price range). Graduate-school education and correspondence courses occupy different positions from workshops and seminars. The former is in the very high price range and very long term. The latter is very long term but in the low to middle price range.

On the positions of providers (see “Position of providers” in Figure 5), the providers of courses in the workshop and seminar format, which make up the bulk of education and training services, offer courses that are less than 151 hours long and at a price under ¥200,000. If we look only at the principal types of providers (private firms, public-interest corporations, employers’ associations, and vocational training corporations), the courses are less than 100 hours long and under ¥200,000 in price.

Among the principal types of providers, (1) vocational schools offer long term courses in the high price range, public-interest corporations offer medium-term courses in the medium price range, and employers’ associations and universities offer short term courses in the low price range, (2) private firms offer medium-term courses at relatively high prices (in the high price range), and (3) vocational training corporations offer long term courses at low prices (in the medium price range).

In addition, graduate schools offer very long term courses for working people in the very high price range. Correspondence courses are also very long term but are provided in a full range of prices, from low (universities) to medium (public-interest corporations and employers’ associations) and high (private firms, vocational schools, and vocational training corporations).

Figure 5. The Positions of Courses and Providers as Observed in Relation to How the Courses are Provided

Total number of hours of training				
Level of tuition	Short term (10-19 hours)	Medium term (27-33 hours)	Long term (53-68 hours)	Very long term
Position of courses	Very high (¥1,732,000)		Workshop and Seminar	Graduate-school courses for working people
	High (¥60,000-74,000)	Management training	Language training	Training for acquiring qualification
	Medium (¥31,000-46,000)	Training in sales, quality control and industrial safety, and personnel and labor affairs	Training for acquiring qualification, Technology and skills training, Training in medical care, etc.	Training for specific groups within the hierarchy, Language training
	Low (¥17,000-27,000)	Training for new recruits Training in manners	Training in accounting and finance	
Position of providers	Very high (¥1,732,000)		Workshop and Seminar	Graduate-school courses for working people
	High (¥129,000-195,000)		Private firms	Private firms Vocational schools Vocational training corporations
	Medium (¥35,000-57,000)		Public-interest corporations	Public-interest corporations Employers' associations
	Low (¥14,000-27,000)	Employers' associations Universities		Universities

(2) Quantitative understanding of the market structure

We have so far sorted out the characteristics of the courses of workshops and seminars and correspondence courses from the viewpoint of “for whom the services are intended” and “how the services are provided.” In this section, we examine the volume of services provided in each course. As the indicators of the volume of services (“total man-hour” (for correspondence courses, “total man-month”)), we multiplied the “total number of participants” by the “number of hours of training,” and broke down the volume of services by different types of courses. As a result, we found the following characteristics of the market structure:

- (1) For both workshops and seminars and correspondence courses, specialized training and training for acquiring qualification are two major types.
- (2) Correspondence courses tend to be concentrated in the above two types of training more markedly than workshops and seminars. Moreover, the weight of training for acquiring qualification is particularly large in correspondence courses. On the other hand, the weight of OA and computer training is larger in workshops and seminars than in correspondence courses.
- (3) The amount of education and training services provided in courses for training specific groups within the hierarchy, which are an important branch of vocational training, is small.

(3) Contribution made by this survey and future challenges

We have clarified the structure of the education and training service market in terms of “what types of providers” are providing education and training services “through what kinds of courses” to “whom” and “how” the services are provided. The outcomes of this survey and research are a major contribution in providing valuable information for research on the education and training service market. In addition, they are also beneficial in providing necessary basic information when drawing up policies for enhancing the education and training service market.

For instance, it is essential, in enhancing the education and training service market, that we accurately understand in which fields education and training services are in shortage. Today the market mainly provides the services to mid-level employees of small- and medium-sized firms, and there are not many services for workers of large firms or for managers. The findings of this survey and research are valuable information in accurately grasping in which fields the services are insufficient.

The government is promoting a policy of deregulation with an objective to transfer public-sector work to the private sector as much as possible. In the field of education

and training, it is outsourcing training to private education and training providers. In such cases, an important question is “which providers should be used in which fields of training and at what cost?” The findings of this survey and research on the range of services and tuition of each type of providers will identify the fields in which the strength of each type of providers lies and the approximate costs required by the providers in providing the services, information that is necessary in introducing a system of outsourcing training to the private sector.

This survey and research, however, have several limitations. Most crucially, we have obtained information about the participants only from the side of education and training providers. Therefore, we have not been able to clarify the reasons that the participants, who are the consumers of the services, are taking the courses or what effect the education and training services has on them. We believe that these questions will be answered in our survey of fiscal year 2005, which focuses on individuals.

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