

Summary of Results of the Fiscal 2009 Basic Survey of Human Resources Development
- Human Resources Development Initiatives at Companies Slightly Decline -

[Key Points of Survey Results]

1. Regarding education and training programs which were implemented for regular employees over a one-year period in fiscal 2008, the implementation rate of off the job training decreased from 77.0% in the previous fiscal year to 68.5%. The rate for systematic on the job training decreased from 59.6% in the previous fiscal year to 57.2%, and the rate for self-development support decreased from 79.6% in the previous fiscal year to 66.5%.

In addition, the average expenditure per worker for off the job training and support for self-development also decreased.

2. Regarding the education and training policies for regular employees, the proportion of companies which emphasized promoting ability of workers in general over those of selected workers increased from the previous fiscal year to nearly 50%. In addition, regarding method of training, the proportion of companies which emphasized off the job training increased to nearly 30%.

3. The proportion of workers who undertook self-development was 42.1% for regular employees and 20.0% for non-regular employees; both were lower than that of the previous fiscal year. Regarding the issues of self-development, the responses, "I'm too busy with work and have no time for self-development," and "It costs too much" had high proportions. For non-regular employees, "I'm too busy with family matters and childcare and have no time for self-development" was also a popular response.

4. Concerning the method for developing vocational ability for workers to achieve working life that they hope, the ratio of regular employees who responded "I need to make efforts to develop my skills at my own initiative" was the highest at 47.2%.

1. Survey Objectives

This survey aims to show the current state of the country's companies, business establishments, and human resources development, categorized by regular and non-regular employees. The surveys were also conducted to contribute to the government policies for human resources development.

2. Period of Surveys

The company surveys and individual surveys were conducted in 2009 from October 1 to December 11.

The business establishment surveys were conducted from October 1 to November 20 in the same year.

3. Survey Components

(1) Company Survey

An overview of the company, funds for education and training, and policies for human resources development.

(2) Business Establishment Survey

An overview of the business establishment, the state of implementation of education and training, human resources development, support for career planning, the state of implementation of vocational ability evaluations, and succession of skills.

(3) Individual Survey

The state of off the job training attended, the state of implementation of self development, and future career planning.

4. Targets of Surveys

(1) Company Survey

About 7,100 companies in Japan that were selected using a defined method from among companies with 30 or more full-time employees that belong to the 15 large industries according to the Japanese industrial sector standards (revised November, 2007).

(2) Business Establishment Survey

About 6,700 business establishments in Japan that were selected using a defined method from among business establishments with 30 or more full-time employees that belong to the 15 large industries according to the Japanese industrial sector standards.

(3) Individual Survey

About 25,600 workers, selected using a defined method from the business establishments mentioned in (2).

5. Survey Method

(1) Company Survey

Surveys were sent out to targeted companies from the Human Resources Development Bureau of the Ministry of Health, Labour, and Welfare through private-sector institutions. After the surveys were completed by the targeted companies, they were collected and sent back.

(2) Business Establishment Survey

Surveys were sent out to targeted companies from the Human Resources Development Bureau of the Ministry of Health, Labour, and Welfare through private-sector institutions. After the surveys were completed by the targeted business establishments, they were collected by statistical research staff.

(3) Individual Survey

Through private-sector institutions, the statistical research staff requested the surveys to be distributed to the targeted business establishments. After the surveys were completed by the targeted workers, they were collected and sent back through private-sector institutions.

6. Number of Targets for Survey, Numbers responded, and Response Rate

| | Survey sample size | Number of valid responses | Response Rate |
|-------------------------------|--------------------|---------------------------|---------------|
| Company Survey | 7,122 companies | 3,204 companies | 45.0% |
| Business Establishment Survey | 6,689 businesses | 4,463 businesses | 66.7% |
| Individual Survey | 20,024 employees | 8,075 employees | 40.3% |

7. Main Survey Results
See Annex.

Main Survey Results (Annex)
Summary of Survey Results (Reference1)
Definitions of Main Terms (Reference2)

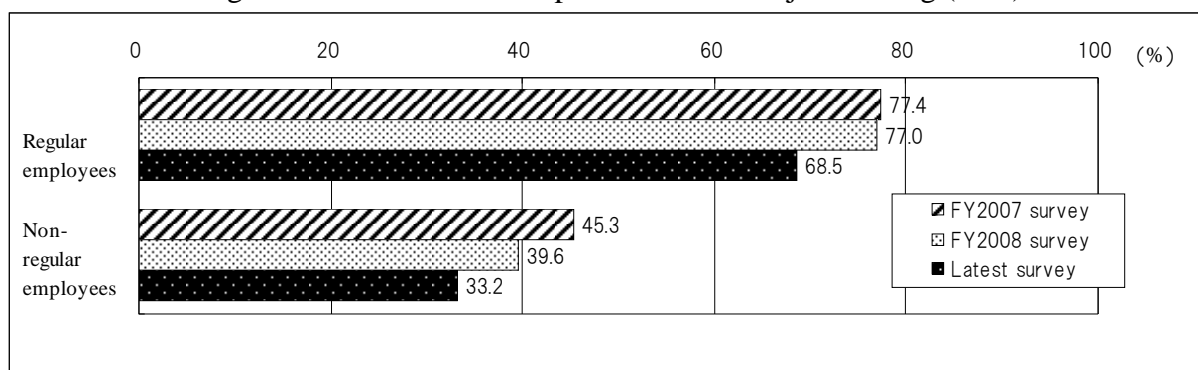
Main Survey Results

1. Regarding education and training programs which were implemented for regular employees over a one-year period in fiscal 2008, the implementation rate of off the job training decreased from 77.0% in the previous fiscal year to 68.5%. The rate for systematic on the job training decreased from 59.6% in the previous fiscal year to 57.2%, and the rate for self-development support decreased from 79.6% in the previous fiscal year to 66.5%. In addition, the average expenditure per worker for off the job training and support for self-development also decreased.

About 68.5% (previous survey¹: 77.0%) of businesses implemented off the job training of regular employees in fiscal 2008. By industry, the proportions were as follows: Electricity, gas, heat supply and water (89.4%), Finance and insurance (87.6%), Scientific research, professional and technical services (82.9%) and so on were high, whereas Living-related and personal services and amusement services (54.6%), Eating and drinking establishments and accommodations (57.3%), Education, learning support (59.5%) and so on were low. Categorized by size of the business, of businesses that have 100 or more employees, about 70% implemented off the job training and of businesses that have 1,000 or more employees, about 85% implemented off the job training.

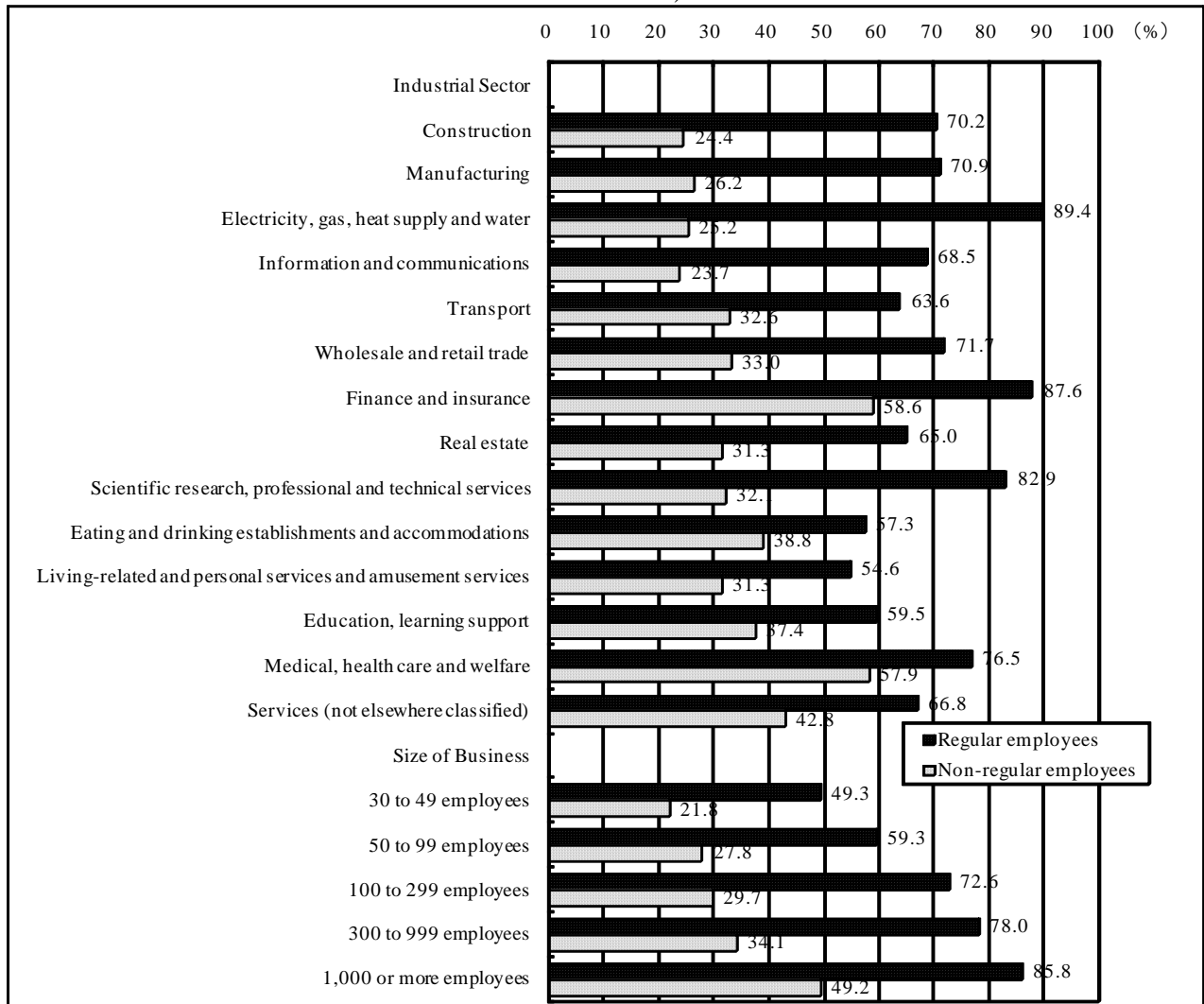
On the other hand, for non-regular employees, about 33.2% (previous survey: 39.6%) of businesses implemented off the job training, representing a lower level than for regular employees. By industry, the proportions were as follows: Finance and insurance (58.6%) and Medical, health care and welfare (57.9%) were high, whereas Information and communications (23.7%), Construction (24.4%), Electricity, gas, heat supply and water (25.2%) and so on were low. These results suggest that there is a general tendency towards a higher proportion of larger businesses implementing off the job training.

Figure 1 Businesses that implemented off the job training (total)



¹ Starting with the latest survey, some questions directed at businesses which do not employ either regular employees or non-regular employees will be omitted from the survey. For this reason, some estimates from the fiscal 2007 and fiscal 2008 surveys have been re-tallied in order to maintain their relevancy.

Figure 2 Businesses that implemented off the job training (categorized by industrial sector and size of business)



About 57.2% (previous survey: 59.6%) of businesses implemented systematic on the job training of regular employees in fiscal 2008. By industry, the proportions were as follows: Finance and insurance (86.4%), Electricity, gas, heat supply and water (85.6%) and so on were high, whereas Living-related and personal services and amusement services (45.1%), Education, learning support (46.8%) and so on were low. Categorized by size of the business, of businesses that have 100 or more employees, about 60% implemented on the job training and of businesses that have 1,000 or more employees, less than 80% implemented on the job training.

On the other hand, about 28.3% (previous survey: 26.9%) of businesses implemented systematic on the job training of non-regular employees, which represents a lower level than for regular employees. By industry, the proportions were as follows: Medical, health care and welfare (48.2%), Finance and insurance (44.0%), and Eating and drinking establishments and accommodations (41.0%) were high, whereas Construction (12.4%), Information and communications (13.0%) and so on were low.

Figure 3 Businesses that implemented systematic on the job training (total)

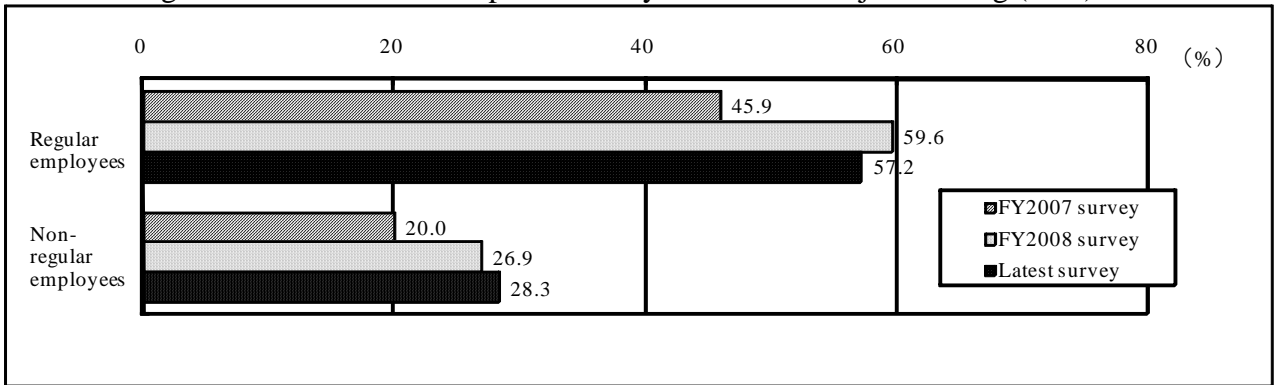
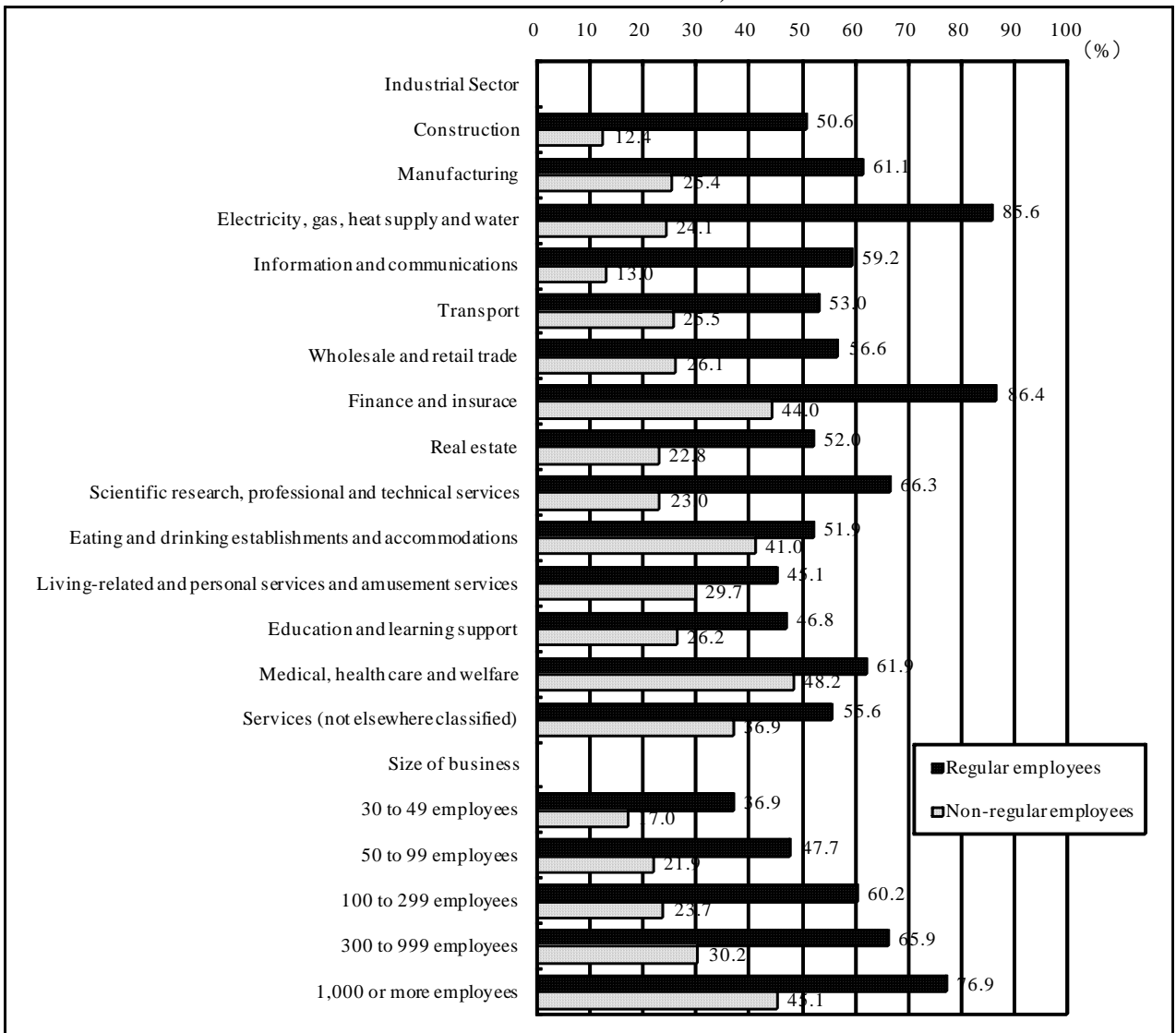


Figure 4 Businesses that implemented systematic on the job training (categorized by industrial sector and size of business)



66.5% (previous survey: 79.6%) of businesses responded “We provide support” for self-development of regular employees. By industry, the proportions were as follows: Electricity, gas, heat supply and water (97.4%) and Finance and insurance (95.1%) were high, whereas Eating and drinking establishments and accommodations (49.1%), Living-related and personal services and amusement services (53.7%) and so on were low.

On the other hand, 41.3% (previous survey: 53.8%) of businesses responded “We provide support” for self-development of non-regular employees. By industry, the proportions for Medical, health care and welfare (74.6%), Finance and insurance (65.2%) and so on were high, whereas Eating and drinking establishments and accommodations (27.3%), Manufacturing (34.0%) and so on were low.

Categorized by size of the business, the proportion of businesses that provided support for self-development of workers tends to be higher among larger businesses.

Figure 5 Businesses that provide support for self-development of workers (total)

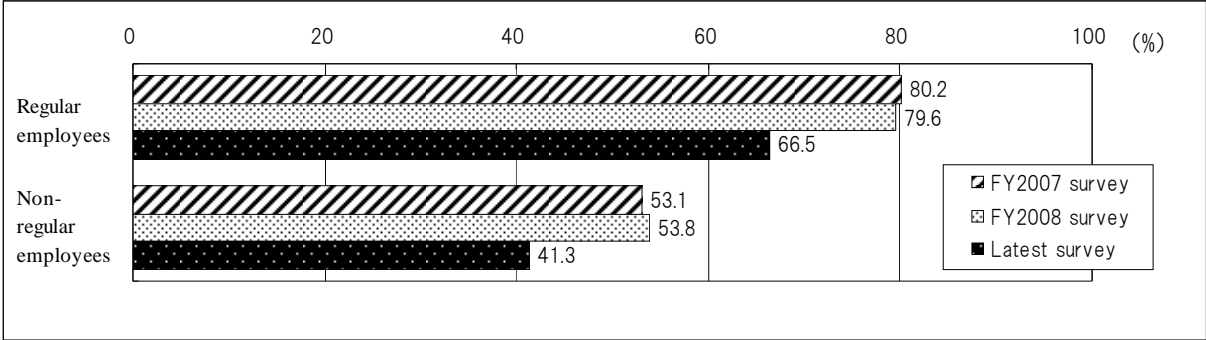
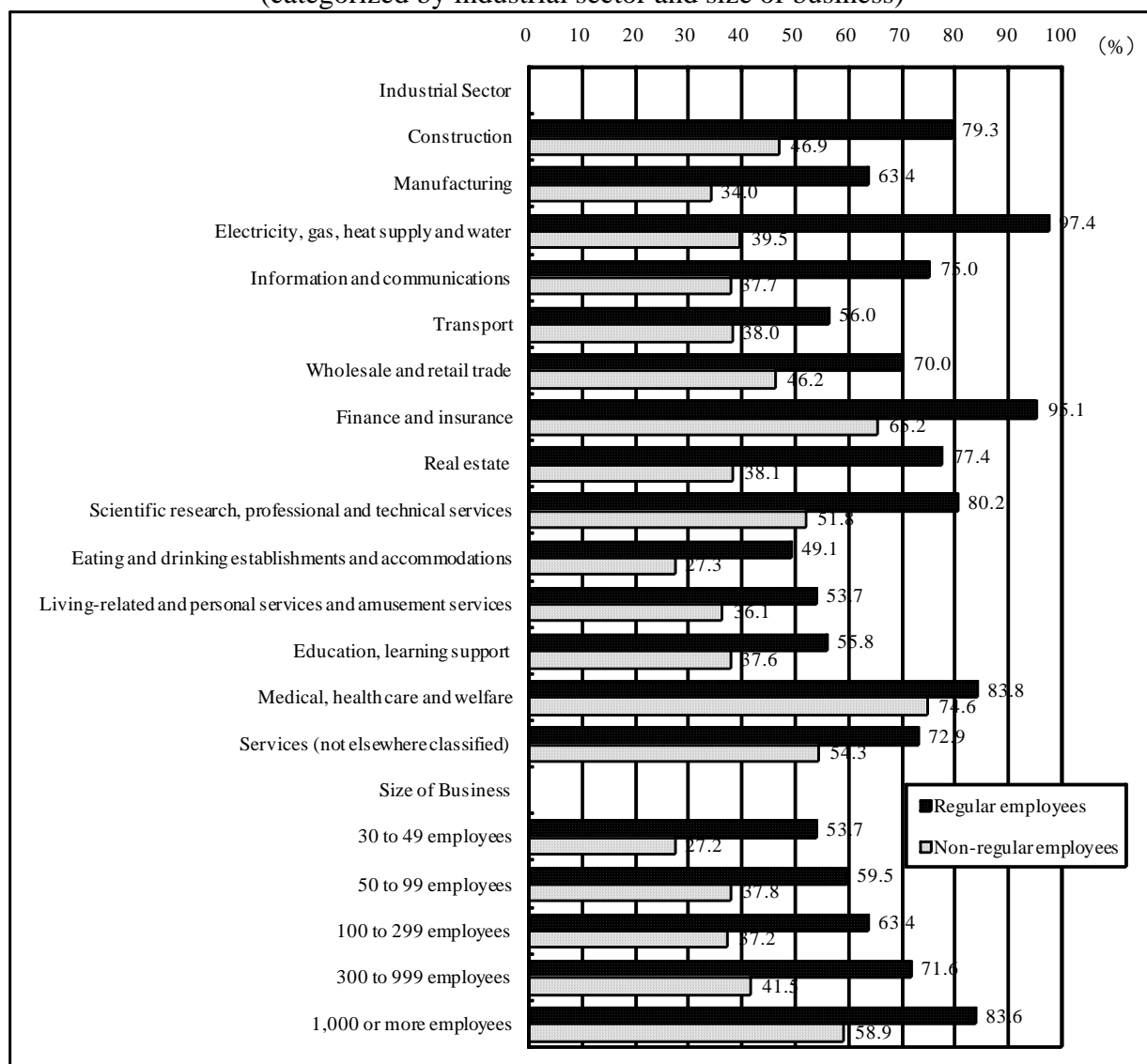


Figure 6 Businesses that provide support for self-development of workers
(categorized by industrial sector and size of business)



In addition, the average expenditure per worker for education and training (the average amount spent by companies; hereafter the same) also decreased, amounting to ¥13,000 for off the job training² (¥25,000 for the survey conducted in fiscal 2008 [hereafter referred to as “previous survey”]) and ¥4,000 (previous survey: ¥8,000) for support for self-development.

² The target respondents of the fiscal 2008 survey and all prior surveys were private-sector companies with 30 or more full-time employees in the headquarters. Starting with the latest survey, the target respondents of the survey were expanded to private-sector companies with 30 or more full-time employees. In order to make time-series comparisons, the estimates here represent those of companies with “30 or more employees in the headquarters.”

Figure 7 Average expenditure per worker for off the job training

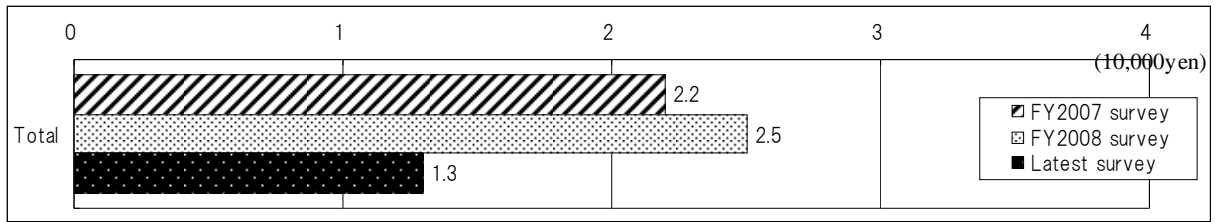
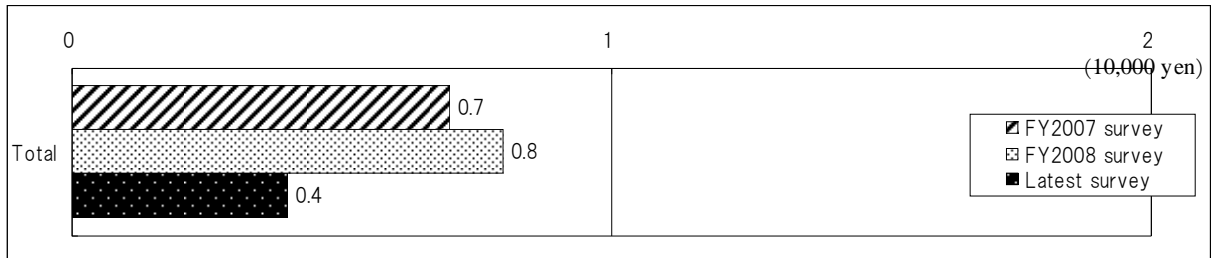


Figure 8 Average expenditure per worker for support for self-development



2. Regarding the education and training policies for regular employees, the proportion of companies which emphasized promoting ability of workers in general over those of selected workers increased from the previous fiscal year to nearly 50%. In addition, regarding method of training, the proportion of companies which emphasized off the job training increased to nearly 30%.

<“Emphasis on selected workers” or “emphasis on workers in general”?>

Regarding the educational policies for regular employees, 49.5% (previous survey: 40.4%) of companies emphasized or mainly emphasized “education and training to promote ability of workers in general”. The proportion of companies that emphasized or mainly emphasized “education and training to promote ability of selected workers” was 50.6% (previous survey: 59.5%).

On the other hand, for non-regular employees, 46.7% (previous survey: 46.0%) of companies emphasized or mainly emphasized “education and training for workers in general”, and 53.2% (previous survey: 54.1%) of companies emphasized or mainly emphasized “education and training for selected workers”.

The latest results regarding regular employees showed that the proportion of companies that responded that they emphasized or mainly emphasized “education and training for workers in general” had increased from the previous survey. Moreover, the results showed that the proportion was approaching the proportion of companies that emphasized or mainly emphasized “education and training for selected workers”.

Figure 9 Emphasized targets of education and training for regular employees

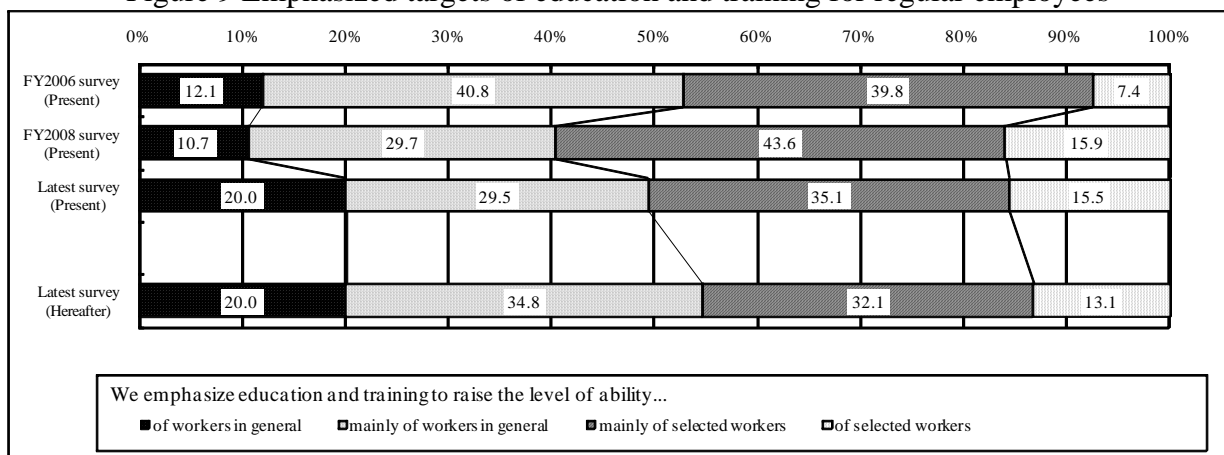
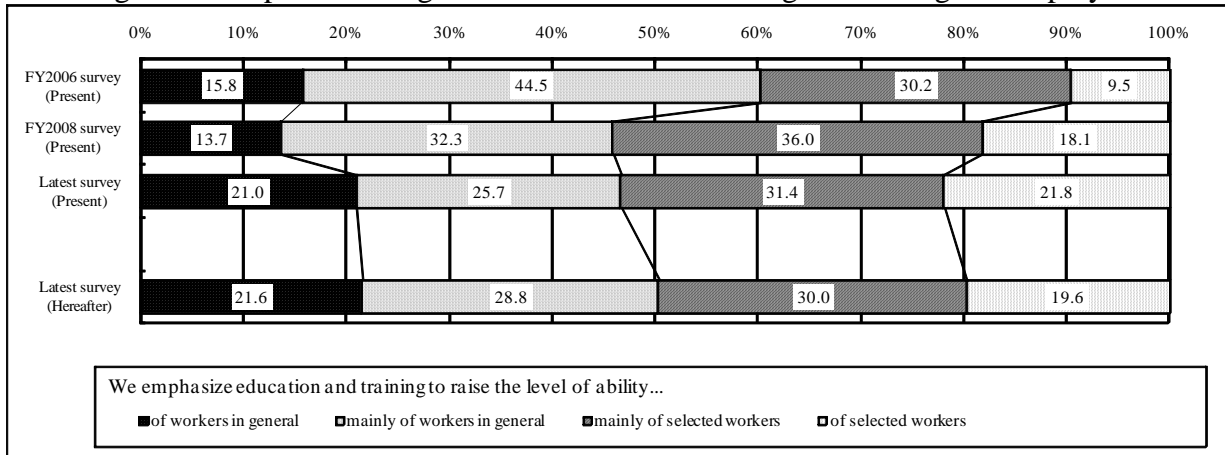


Figure 10 Emphasized targets of education and training for non-regular employees



<“On the job training” or “off the job training”?>

Regarding the method for education and training of regular employees, 70.8% (previous survey: 74.4%) of companies emphasized or mainly emphasized “on the job training”, and 29.2% (previous survey: 25.6%) emphasized or mainly emphasized “off the job training”.

On the other hand, for non-regular employees, 78.2% (previous survey: 80.0%) of companies emphasized or mainly emphasized “on the job training”.

In comparison to the previous survey, there has been a slight increase of companies that emphasize or mainly emphasize “off the job training” for regular employees, but the proportion has remained steady for non-regular employees.

Figure 11 Emphasis of method for education and training (regular employees)

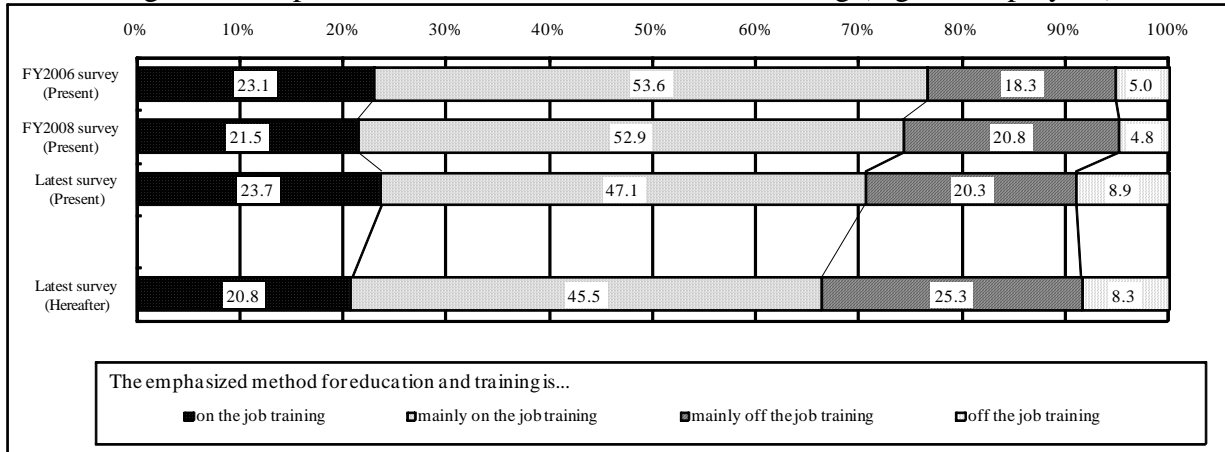
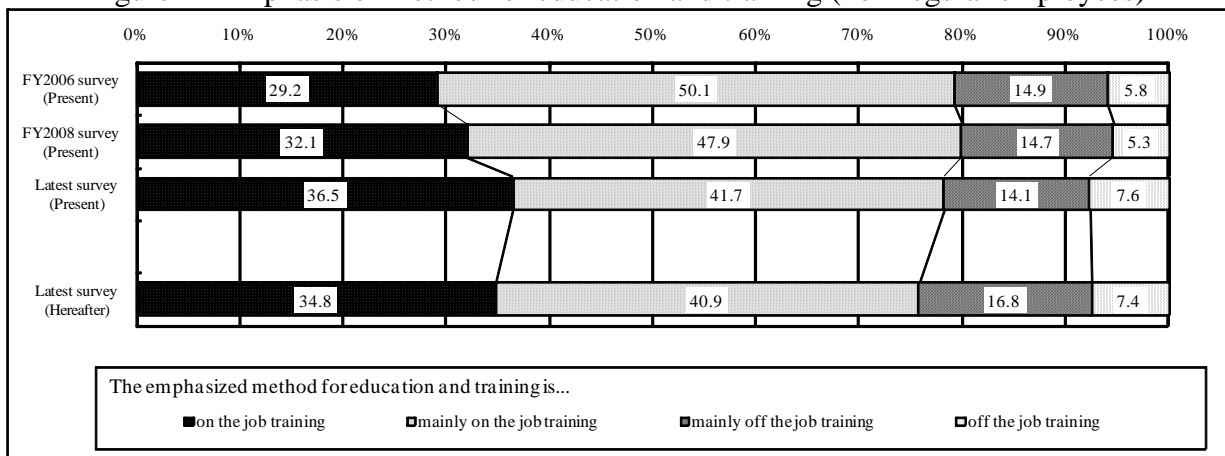


Figure 12 Emphasis of method for education and training (non-regular employees)

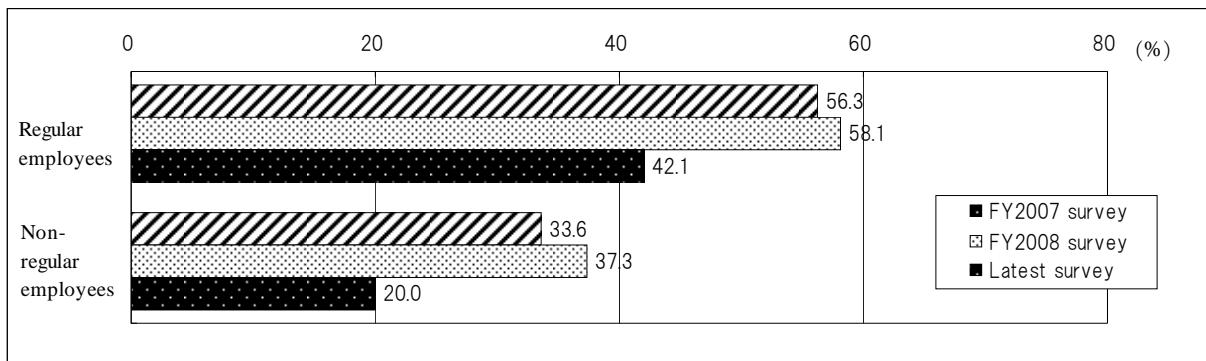


3. The proportion of workers who undertook self-development was 42.1% for regular employees and 20.0% for non-regular employees; both were lower than that of the previous fiscal year. Regarding the issues of self-development, the responses, “I’m too busy with work and have no time for self-development,” and “It costs too much” had high proportions. For non-regular employees, “I’m too busy with family matters and childcare and have no time for self-development” was also a popular response.

< The state of implementation of self-development >

The ratio of workers who undertook self-development in fiscal 2008 was 42.1% (previous survey: 58.1%) of regular employees and 20.0% (previous survey: 37.3%) of non-regular employees. For both regular and non-regular employees, the ratio of workers who undertook self-development decreased from the previous fiscal year.

Figure 13 Workers who undertook self-development



<Issues with self-development>

The ratio of workers who responded that there are issues with self-development was 80% (80.8% [previous survey: 77.1%]) of regular employees and over 70% (74.5% [previous survey: 70.1%]) of non-regular employees.

As issues with self-development, the greatest proportion of both regular employees and non-regular employees responded “I’m too busy with work and have no time for self-development” (55.8%, 36.5%).

Responses regarding non-regular employees that were high compared to those regarding regular employees were “I’m too busy with family matters and childcare and have no time for self-development”, “I don’t know what career I should be aiming for”, “It’s hard to get hold of information about courses and so on”, “I cannot find an appropriate education and training institution”, and “I don’t know what sort of course is appropriate for the career I’m aiming for”.

Figure 14 Workers who responded that there are issues with self-development

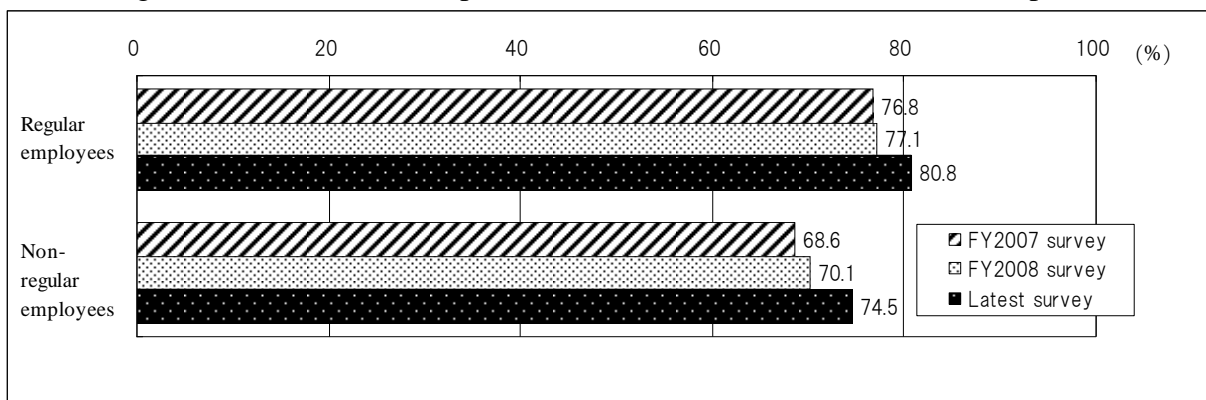
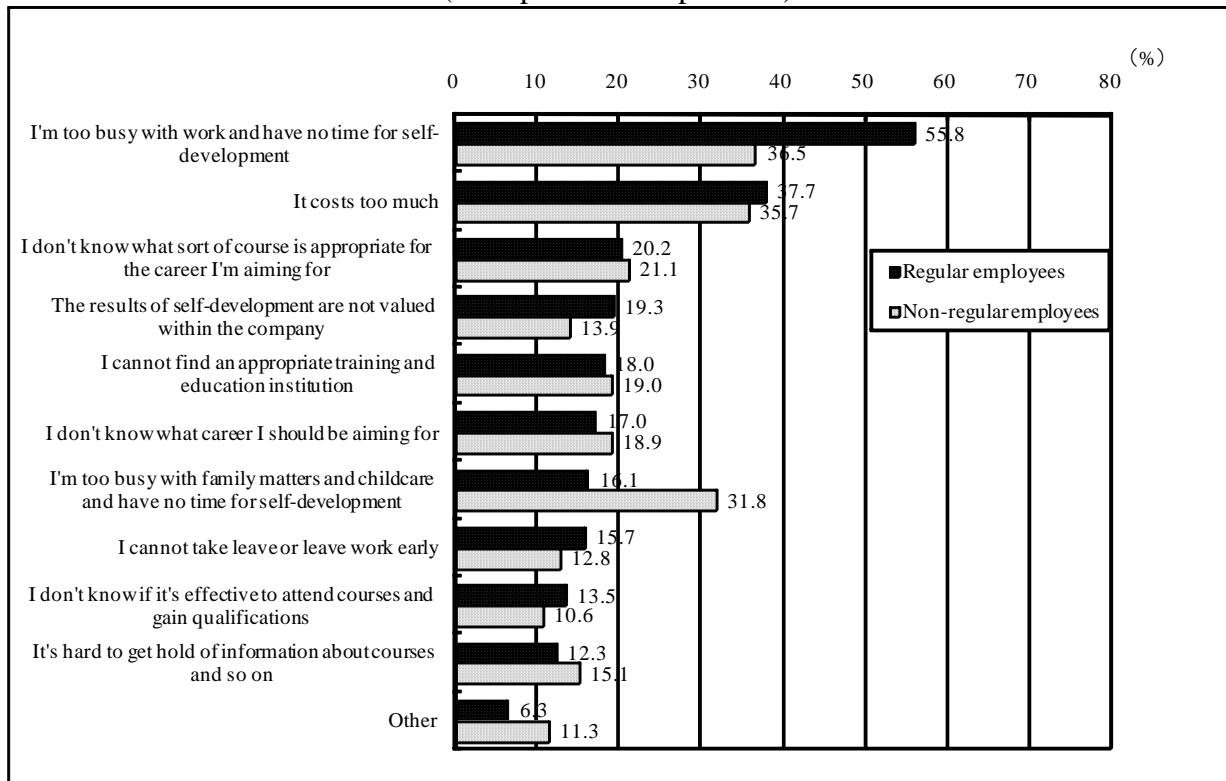


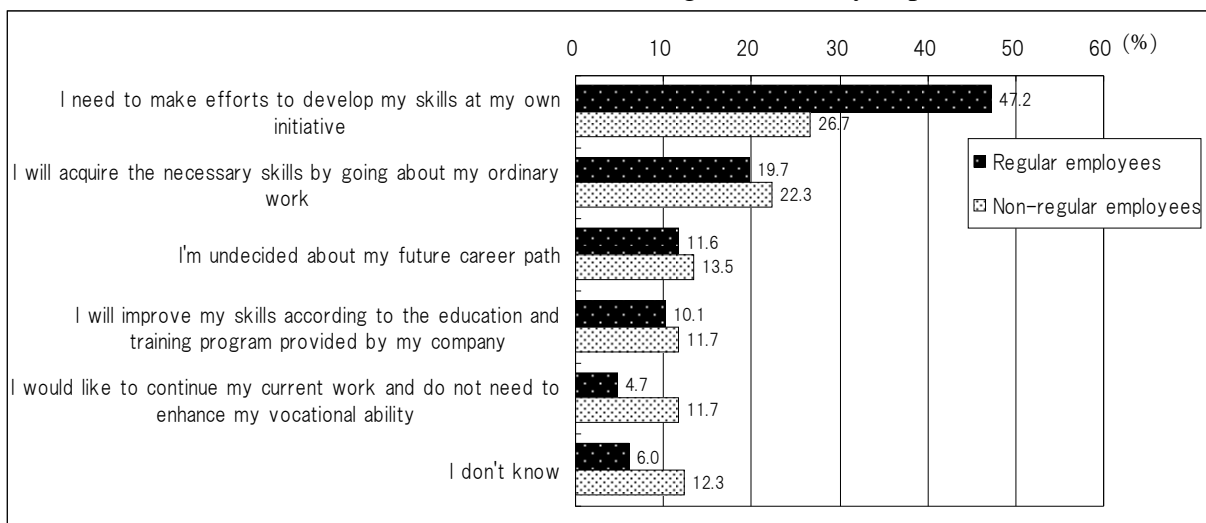
Figure 15 Issues among workers who responded that there are issues with self-development (multiple answers possible)



4. Concerning the method for developing vocational ability for workers to achieve working life that they hope, the ratio of regular employees who responded “I need to make efforts to develop my skills at my own initiative” was the highest at 47.2%.

Concerning the method for developing vocational ability for workers to achieve working life that they hope, the ratio of regular employees who responded “I need to make efforts to develop my skills at my own initiative” was the highest at 47.2%. On the other hand, for non-regular employees, the ratio responding “I need to make efforts to develop my skills at my own initiative” was also the highest at 26.7%, but it accounts for a small proportion of the total responses. For this reason, a higher ratio of non-regular employees identified other items compared with regular employees, including “I will acquire the necessary skills by going about my ordinary training” (22.3%).

Figure 16 The method for developing vocational ability for workers to achieve working life that they hope



Summary of Survey Results

1. Company Survey¹

(1) Expenditure for off the job training and support for self-development (Figures 1 and 2)

The average expenditure per worker for education and training (the average amount spent by companies; hereafter the same) decreased, amounting to ¥13,000 for off the job training (¥25,000 for the survey conducted in fiscal 2008 [hereafter referred to as “previous survey”]) and ¥4,000 (previous survey: ¥8,000) for support for self-development.

Figure 1 Average expenditure per worker for off the job training

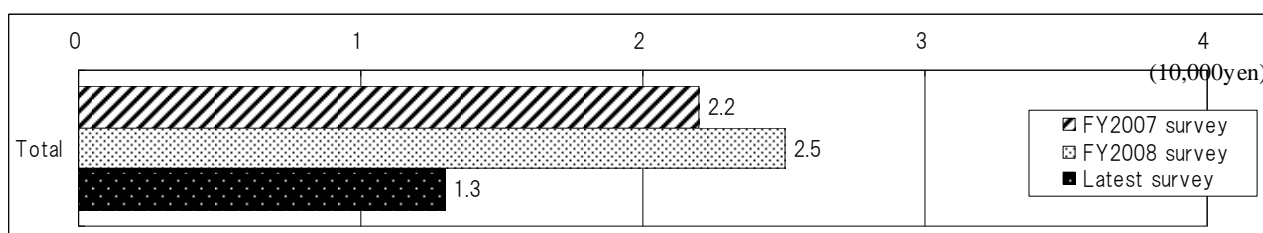
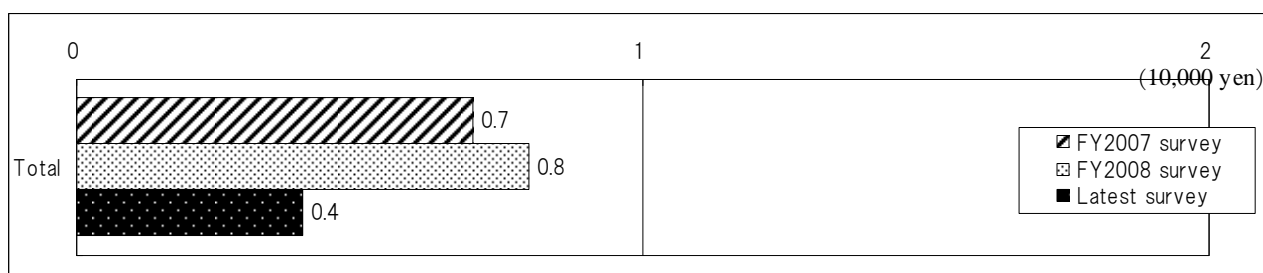


Figure 2 Average expenditure per worker for support for self-development



¹ The target respondents of the fiscal 2008 survey and all prior surveys were private-sector companies with 30 or more full-time employees in the headquarters. Starting with the latest survey, the target respondents of the survey were expanded to private-sector companies with 30 or more full-time employees. In order to make time-series comparisons, the estimates here represent those of companies with “30 or more employees in the headquarters.”

(2) Policies for human resources development for employees

1) “Emphasis on selected workers” or “emphasis on workers in general”? (Figures 3 and 4)

Regarding the educational policies for regular employees, 49.5% (previous survey: 40.4%) of companies emphasized or mainly emphasized “education and training to promote ability of workers in general”. The proportion of companies that emphasized or mainly emphasized “education and training to promote ability of selected workers” was 50.6% (previous survey: 59.5%).

On the other hand, for non-regular employees, 46.7% (previous survey: 46.0%) of companies emphasized or mainly emphasized “education and training for workers in general”, and 53.2% (previous survey: 54.1%) of companies emphasized or mainly emphasized “education and training for selected workers”.

The latest results regarding regular employees showed that the proportion of companies that responded that they emphasized or mainly emphasized “education and training for workers in general” had increased from the previous survey. Moreover, the results showed that the proportion was approaching the proportion of companies that emphasized or mainly emphasized “education and training for selected workers”.

Survey results about the future for both regular and non-regular employees suggest that the proportion of companies that emphasize or mainly emphasize “education and training for workers in general” will increase from the survey results regarding the current state. These proportions were 54.8% for regular employees and 50.4% for non-regular employees.

Figure 3 Emphasized targets of education and training for regular employees

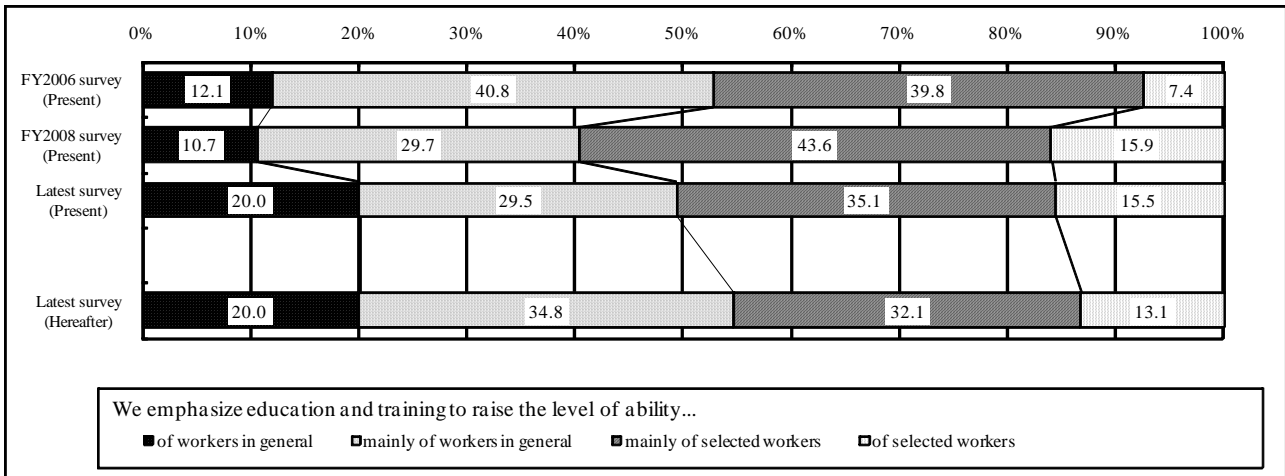
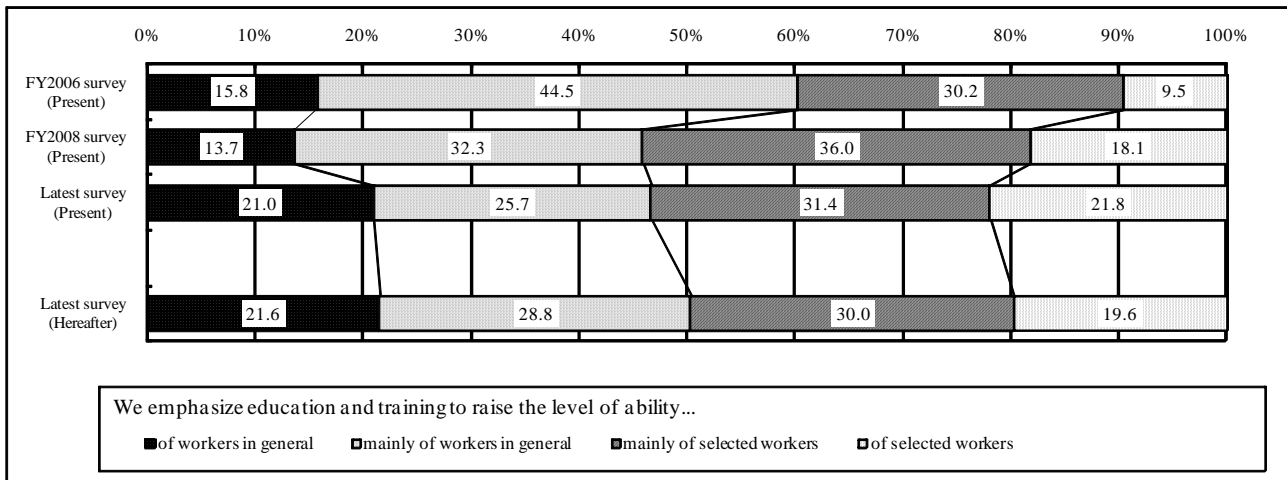


Figure 4 Emphasized targets of education and training for non-regular employees



2) “On the job training” or “off the job training”? (Figures 5 and 6)

Regarding the method for education and training of regular employees, 70.8% (previous survey: 74.4%) of companies emphasized or mainly emphasized “on the job training”, and 29.2% (previous survey: 25.6%) emphasized or mainly emphasized “off the job training”.

On the other hand, for non-regular employees, 78.2% (previous survey: 80.0%) of companies emphasized or mainly emphasized “on the job training”.

In comparison to the previous survey, there has been a slight increase of companies that emphasize or mainly emphasize “off the job training” for regular employees, but the proportion has remained steady for non-regular employees.

Survey results regarding future education and training for both regular and non-regular employees suggest that the proportion of companies that emphasize or mainly emphasize “off the job training” will increase from the survey results regarding the current state. These proportions were 33.6% for regular employees and 24.2% for non-regular employees.

Figure 5 Emphasis of method for education and training (regular employees)

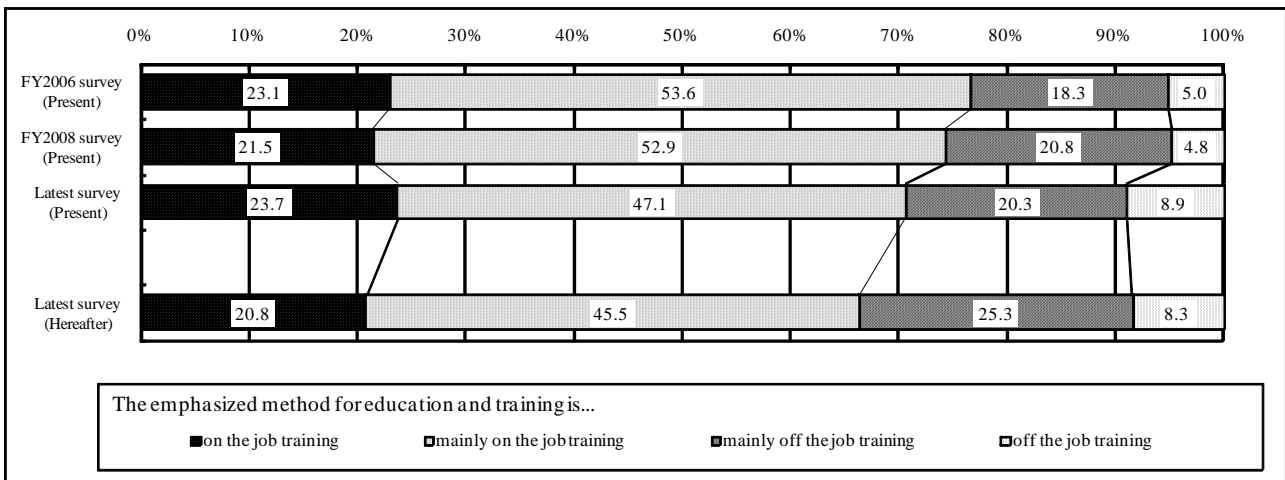
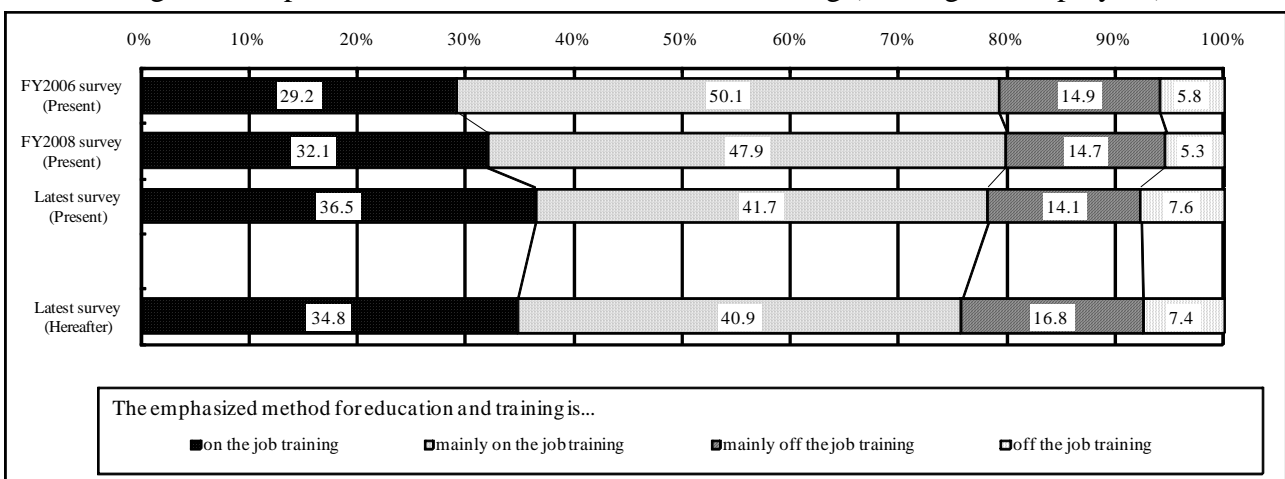


Figure 6 Emphasis of method for education and training (non-regular employees)



3) “Outsourced” or “in-house” education and training? (Figures 7 and 8)

Regarding the method for education and training of regular employees, 43.0% (previous survey: 45.6%) of companies emphasized or mainly emphasized “outsourcing”, and 56.9% (previous survey: 54.4%) emphasized or mainly emphasized “in-house”.

On the other hand, for non-regular employees, 27.3% (previous survey: 28.0%) of companies emphasized or mainly emphasized “outsourcing”, and 72.6% (previous survey: 71.9%) of companies emphasized or mainly emphasized “in-house”. Compared to regular employees, the proportion of companies that emphasized or mainly emphasized “outsourcing” is low.

In comparison to the previous survey, there has been a slight decrease of companies that emphasize or mainly emphasize “outsourcing” for regular employees.

Survey results regarding the future method for education and training for both regular and non-regular employees suggest that the proportion of companies that emphasize or mainly emphasize “outsourcing” will slightly increase from the survey results regarding the current state.

Figure 7 Policy of method for education and training (regular employees)

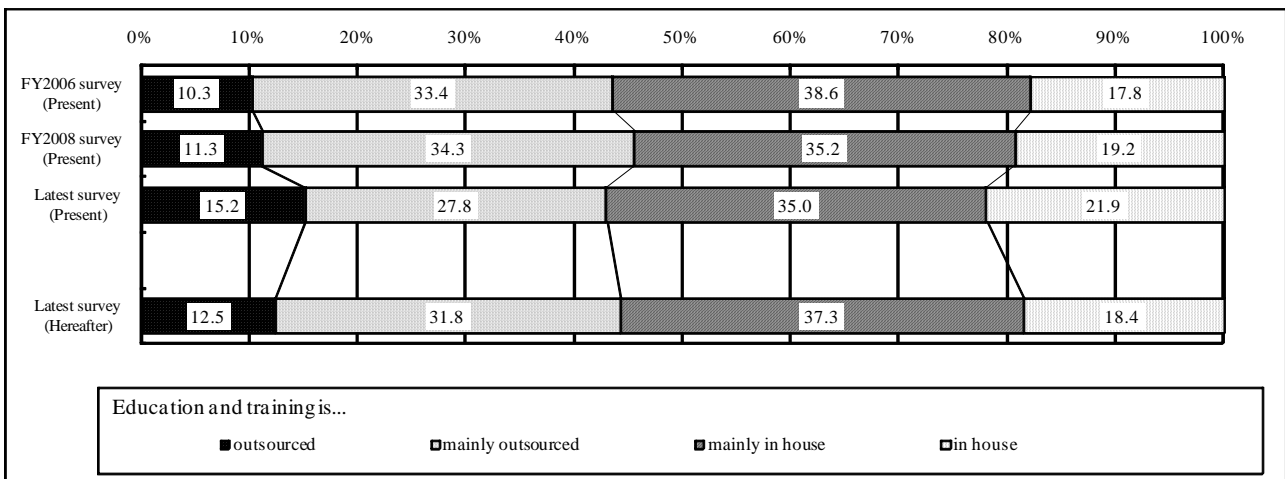
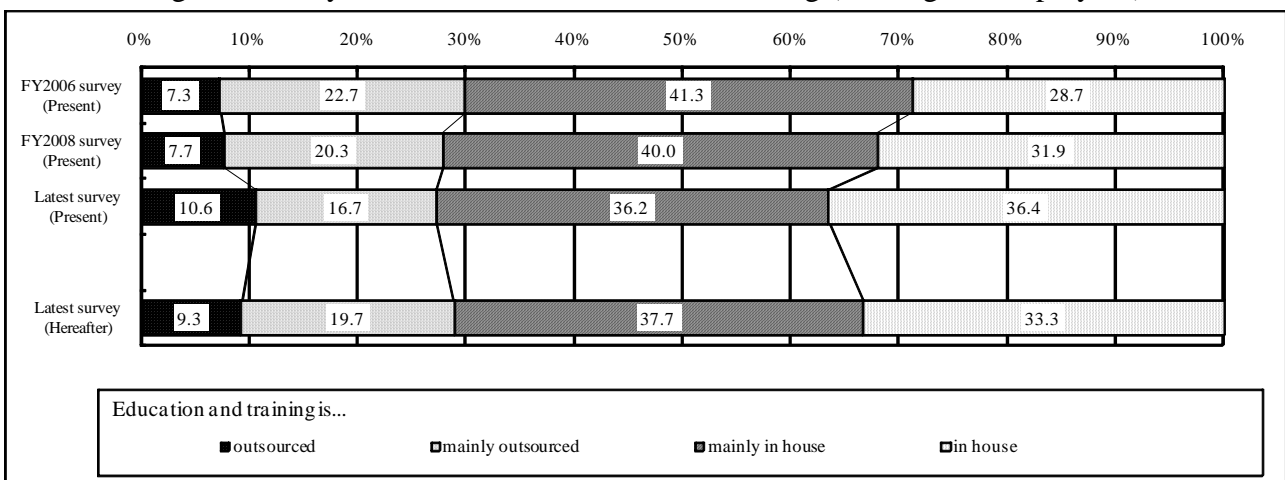


Figure 8 Policy of method for education and training (non-regular employees)



2. Business Establishment Survey

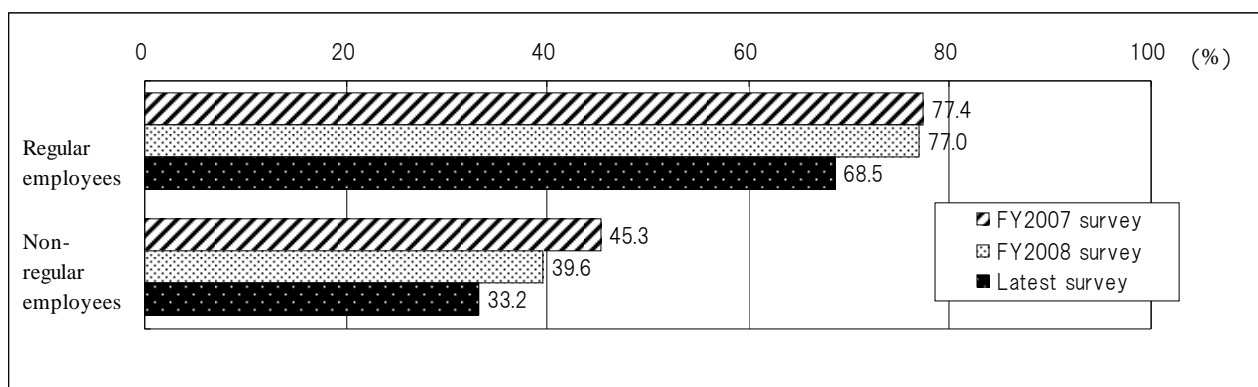
(1) The state of implementation of education and training

1) The state of implementation of off the job training (Figures 9 and 10)

About 68.5% (previous survey²: 77.0%) of businesses implemented off the job training of regular employees in fiscal 2008. By industry, the proportions were as follows: Electricity, gas, heat supply and water (89.4%), Finance and insurance (87.6%), Scientific research, professional and technical services (82.9%) and so on were high, whereas Living-related and personal services and amusement services (54.6%), Eating and drinking establishments and accommodations (57.3%), Education, learning support (59.5%) and so on were low. Categorized by size of the business, of businesses that have 100 or more employees, about 70% implemented off the job training and of businesses that have 1,000 or more employees, about 85% implemented off the job training.

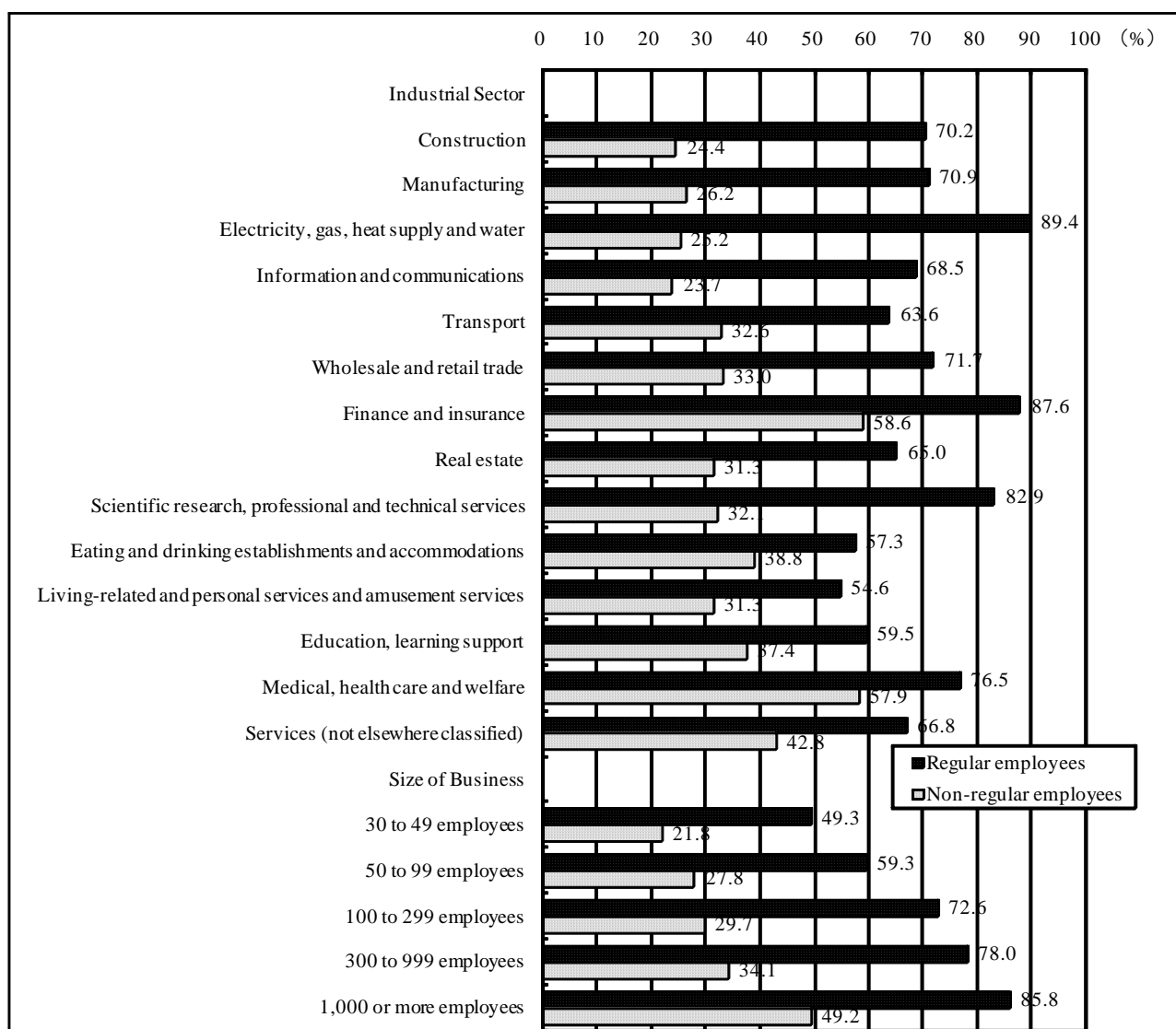
On the other hand, for non-regular employees, about 33.2% (previous survey: 39.6%) of businesses implemented off the job training, representing a lower level than for regular employees. By industry, the proportions were as follows: Finance and insurance (58.6%) and Medical, health care and welfare (57.9%) were high, whereas Information and communications (23.7%), Construction (24.4%), Electricity, gas, heat supply and water (25.2%) and so on were low. Categorized by size of the business, there is a tendency towards a higher proportion of larger businesses implementing off the job training.

Figure 9 Businesses that implemented off the job training (total)



² Starting with the latest survey, some questions directed at businesses which do not employ either regular employees or non-regular employees will be omitted from the survey. For this reason, some estimates from the fiscal 2007 and fiscal 2008 surveys have been re-tallied in order to maintain their relevancy.

Figure 10 Businesses that implemented off the job training (categorized by industrial sector and size of business)



2) The state of implementation of systematic on the job training (Figures 11 and 12)

About 57.2% (previous survey: 59.6%) of businesses implemented systematic on the job training of regular employees in fiscal 2008. By industry, the proportions were as follows: Finance and insurance (86.4%), Electricity, gas, heat supply and water (85.6%) and so on were high, whereas Living-related and personal services and amusement services (45.1%), Education, learning support (46.8%) and so on were low. Categorized by size of the business, of businesses that have 100 or more employees, about 60% implemented on the job training and of businesses that have 1,000 or more employees, less than 80% implemented on the job training.

On the other hand, about 28.3% (previous survey: 26.9%) of businesses implemented systematic on the job training of non-regular employees, which represents a lower level than for regular employees. By industry, the proportions were as follows: Medical, health care and welfare (48.2%), Finance and insurance (44.0%), and Eating and drinking

establishments and accommodations (41.0%) were high, whereas Construction (12.4%), Information and communications (13.0%) and so on were low.

Figure 11 Businesses that implemented systematic on the job training (total)

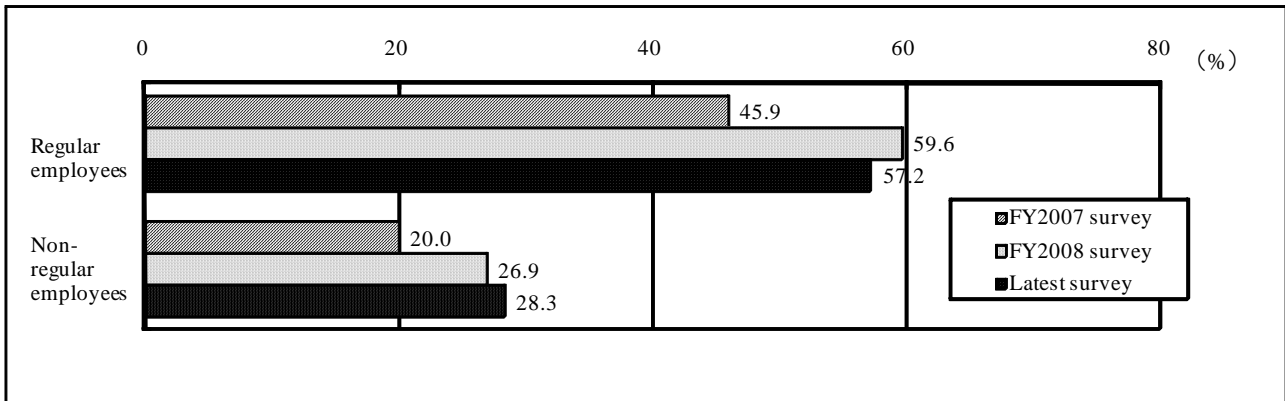
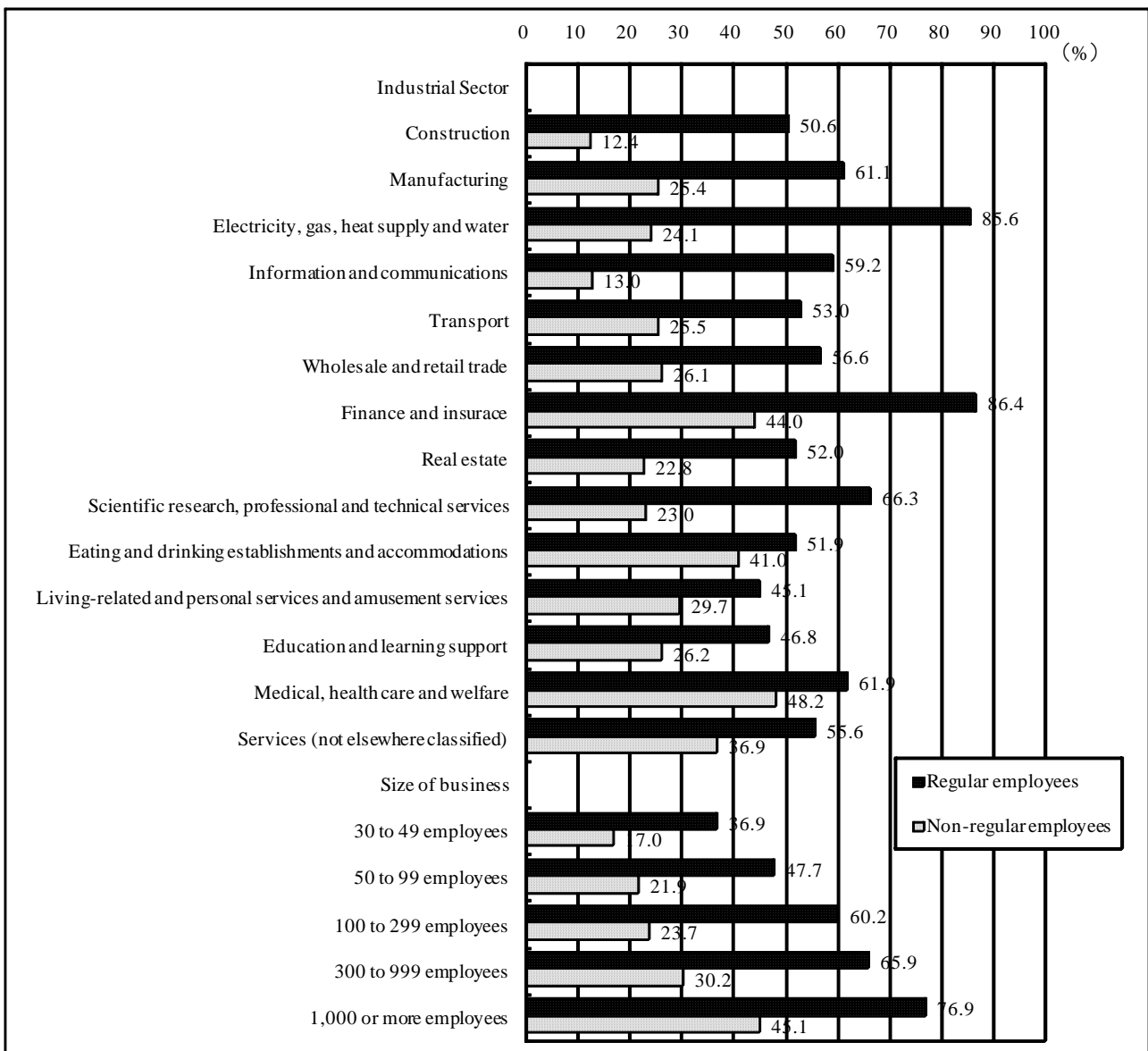


Figure 12 Businesses that implemented systematic on the job training (categorized by industrial sector and size of business)



(2) Concerning human resources development

1) Issues concerning human resources development (Figures 13 and 14)

69.0% (previous survey: 72.1%) of businesses responded “There are problems with human resources development”. The nature of the issues were as follows (multiple answers allowed): “There are insufficient personnel to provide guidance” (50.3% [previous survey: 49.6%]) and “There is no time for carrying out human resources development” (46.5% [previous survey: 47.2%]) were the highest, followed by “Even if we train personnel, they quit” (33.9% [previous survey: 38.7%]), “We cannot get disciplined people” (26.5% [previous survey: 30.3%]), and “We cannot afford to carry out personnel development” (26.3% [previous survey: 20.8%]). The proportion of businesses that responded “We cannot afford to carry out personnel development” had increased from the previous survey.

Figure 13 Businesses that reported problems with human resources development

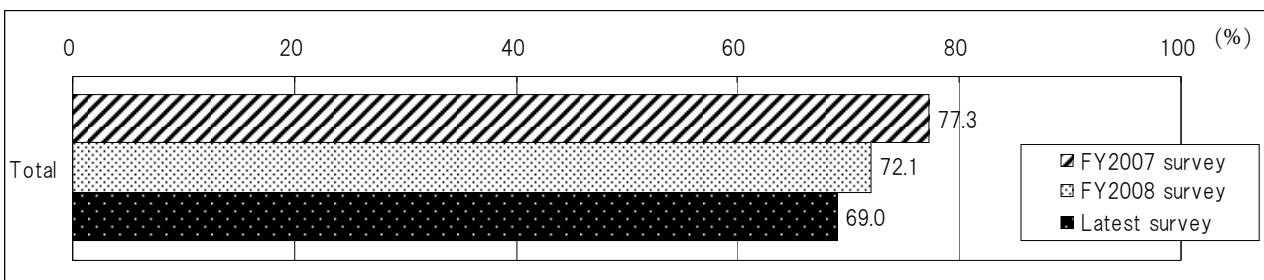
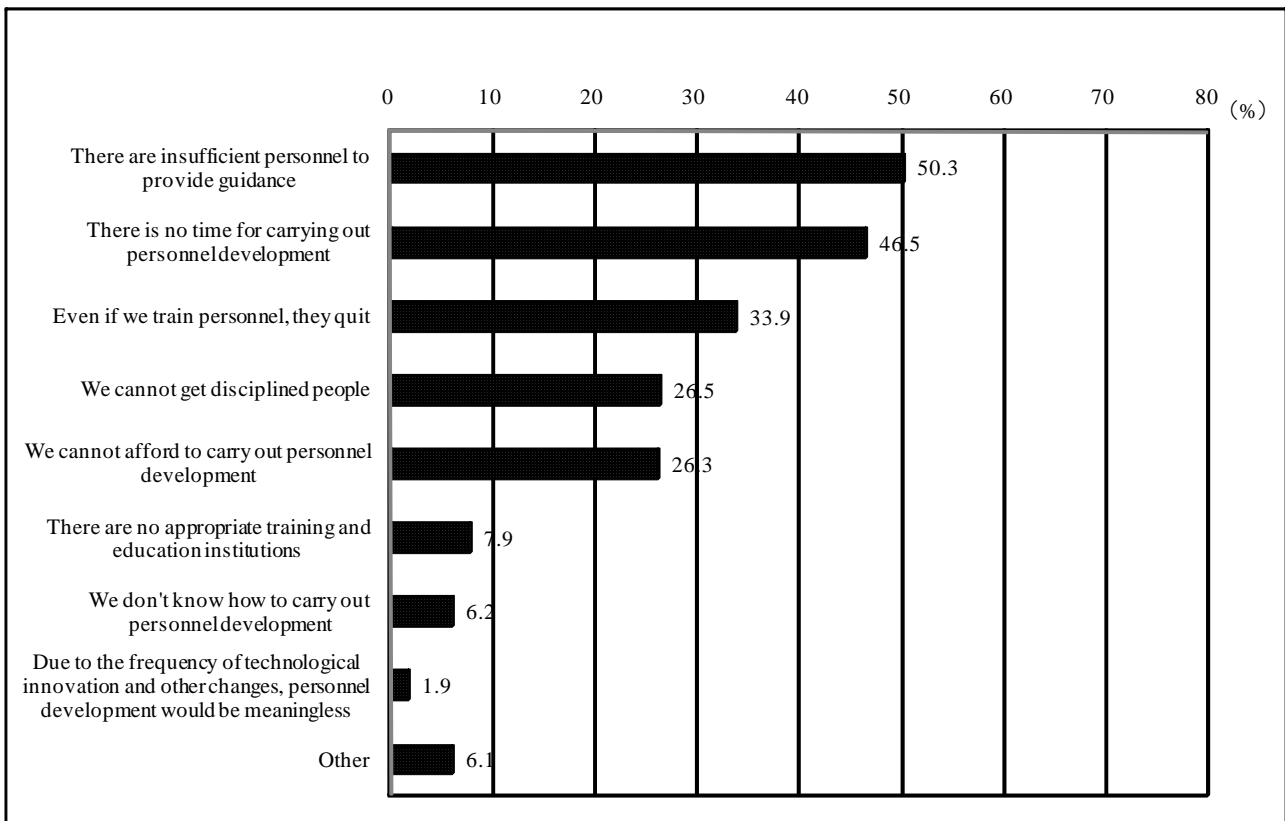


Figure 14 Breakdown of problems with human resources development (multiple answers allowed)



2) Awareness of the ability required of workers (Figure 15)

90% (90.2% [previous survey: 88.9%]) of businesses report informing regular employees what abilities are required of them, with 52.4% (previous survey: 46.5%) responding “We inform our workers”, and 37.8% (previous survey: 42.4%) responding “We inform our workers to a certain extent”.

Almost 80% (79.0% [previous survey: 76.8%]) of businesses report informing non-regular employees, with 36.9% (previous survey: 32.4%) responding “We inform our workers”, and 42.1% (previous survey: 44.4%) responding “We inform our workers to a certain extent”.

Figure 15 Awareness of the ability required of workers

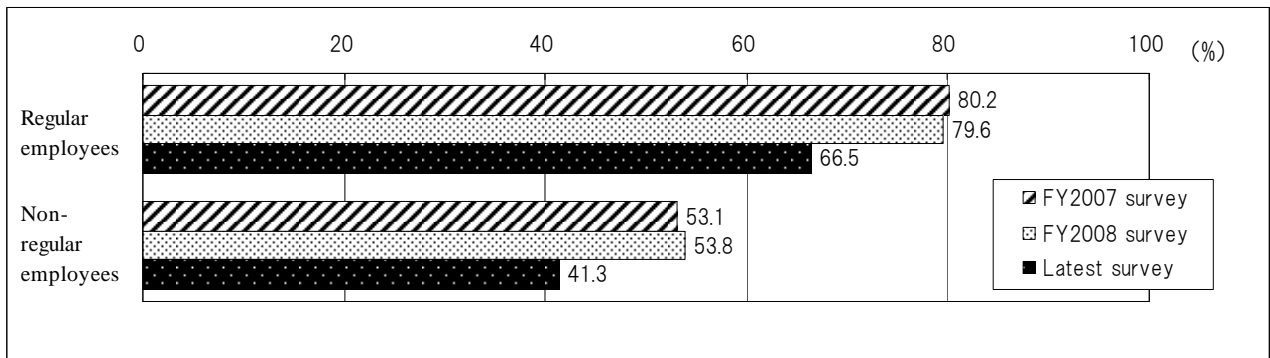


(3) Support for career planning

1) Support for self-development (Figures 16 to 18)

66.5% (previous survey: 79.6%) of businesses responded “We provide support” for self-development of regular employees. By industry, the proportions were as follows: Electricity, gas, heat supply and water (97.4%) and Finance and insurance (95.1%) were high, whereas Eating and drinking establishments and accommodations (49.1%), Living-related and personal services and amusement services (53.7%) and so on were low. Categorized by size of the business, the proportion of businesses that provided support for self-development of workers was higher among larger businesses.

Figure 16 Businesses that provide support for self-development of workers (total)



The nature of the support (multiple answers allowed) was as follows: The ratio of the response “Financial assistance with course fees etc.” was highest at 83.1% (previous survey: 72.4%), followed by “Provision of information concerning training and education institutions, correspondence learning etc.” at 45.7% (previous survey: 40.6%), “Support for autonomous study groups within the company” at 39.6% (previous survey: 39.2%) and so on.

On the other hand, 41.3% (previous survey: 53.8%) of businesses responded “We provide support” for self-development of non-regular employees. By industry, the proportion for Medical, health care and welfare (74.6%) and Finance and insurance (65.2%) were high, whereas Eating and drinking establishments and accommodations (27.3%), Manufacturing (34.0%) and so on were low. Categorized by size of the business, the proportion of businesses that provided support for self-development of workers tends to be higher among larger businesses.

The nature of the support (multiple answers allowed) was as follows: the ratio of the response “Financial assistance with course fees etc.” was the highest at 70.4% (previous survey: 50.2%), followed by “Provision of information concerning training and education institutions, correspondence learning etc.” at 45.3% (previous survey: 34.4%) and “Support for autonomous study groups within the company” at 42.2% (previous survey: 36.6%).

Figure 17 Businesses that provide support for self-development of workers (categorized by industrial sector and size of business)

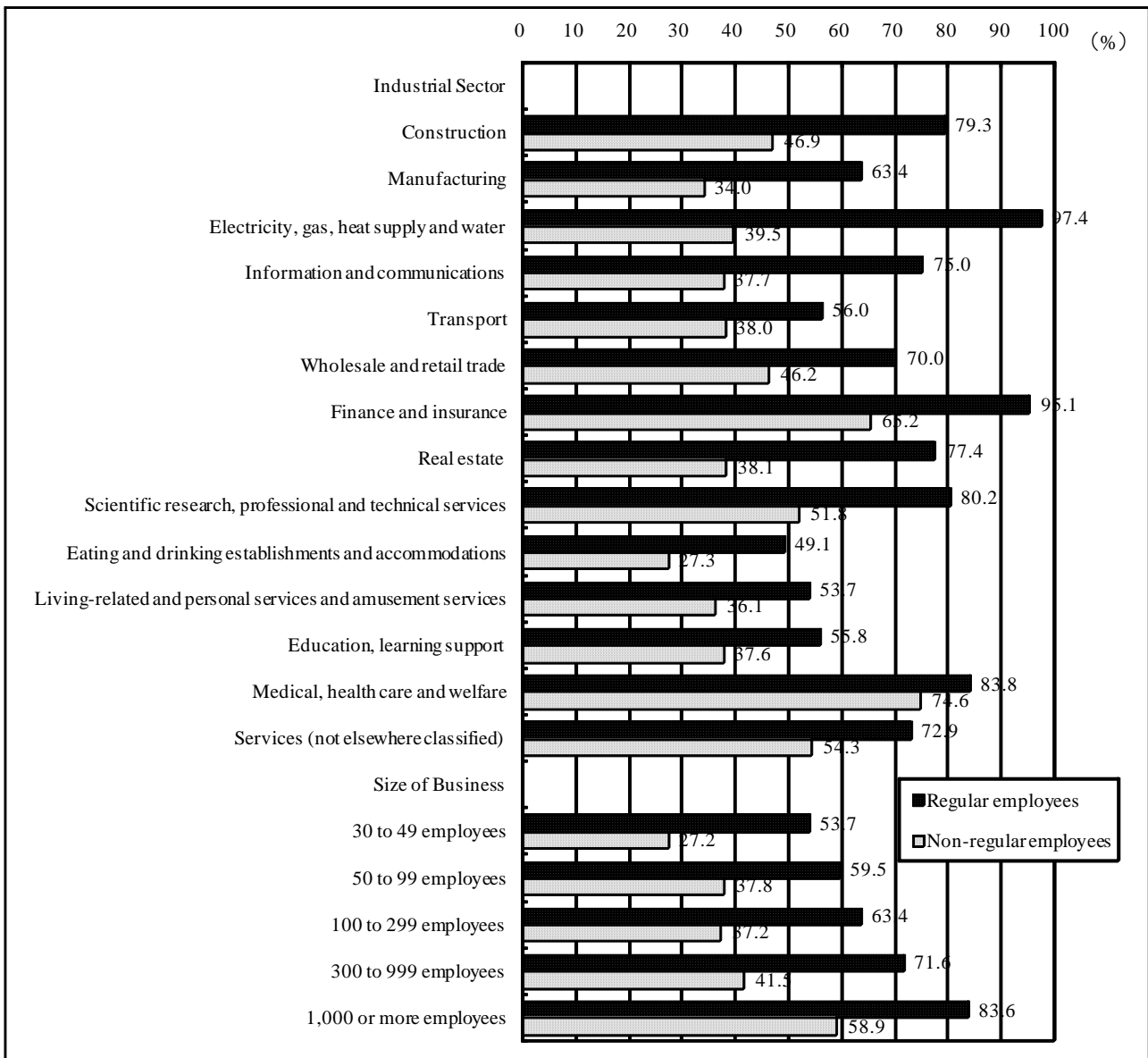
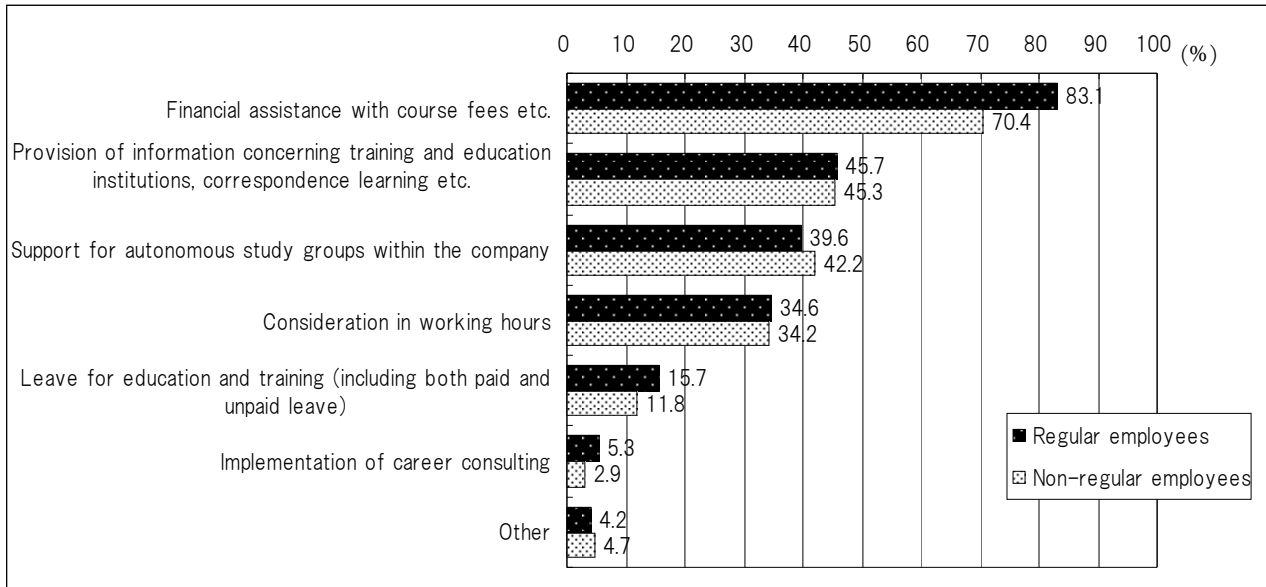


Figure 18 The nature of support for self-development of workers (multiple answers allowed)



2) The state of implementation of leave systems for education and training (Figures 19 and 20)

Only 7.6% (previous survey 6.7%) of businesses implement a leave system for education and training. By industry, Electricity, gas, heat supply and water had the highest proportion at 27.1%, followed by Finance and insurance (16.0%) and Construction (12.5%). In addition, categorized by size of the business, the range of proportions is small.

Figure 19 Businesses that implement a leave system for education and training (total)

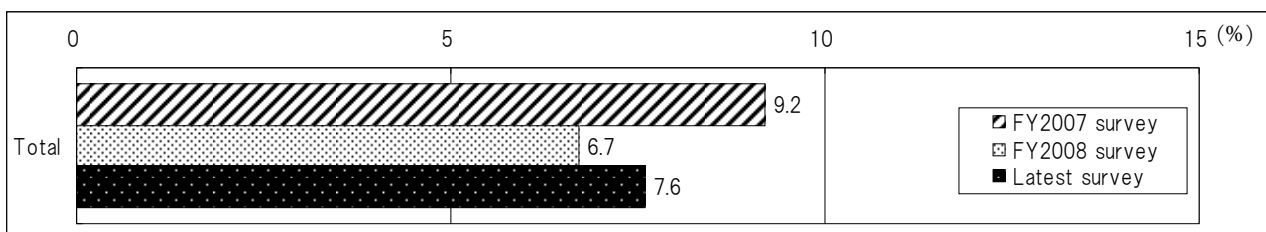
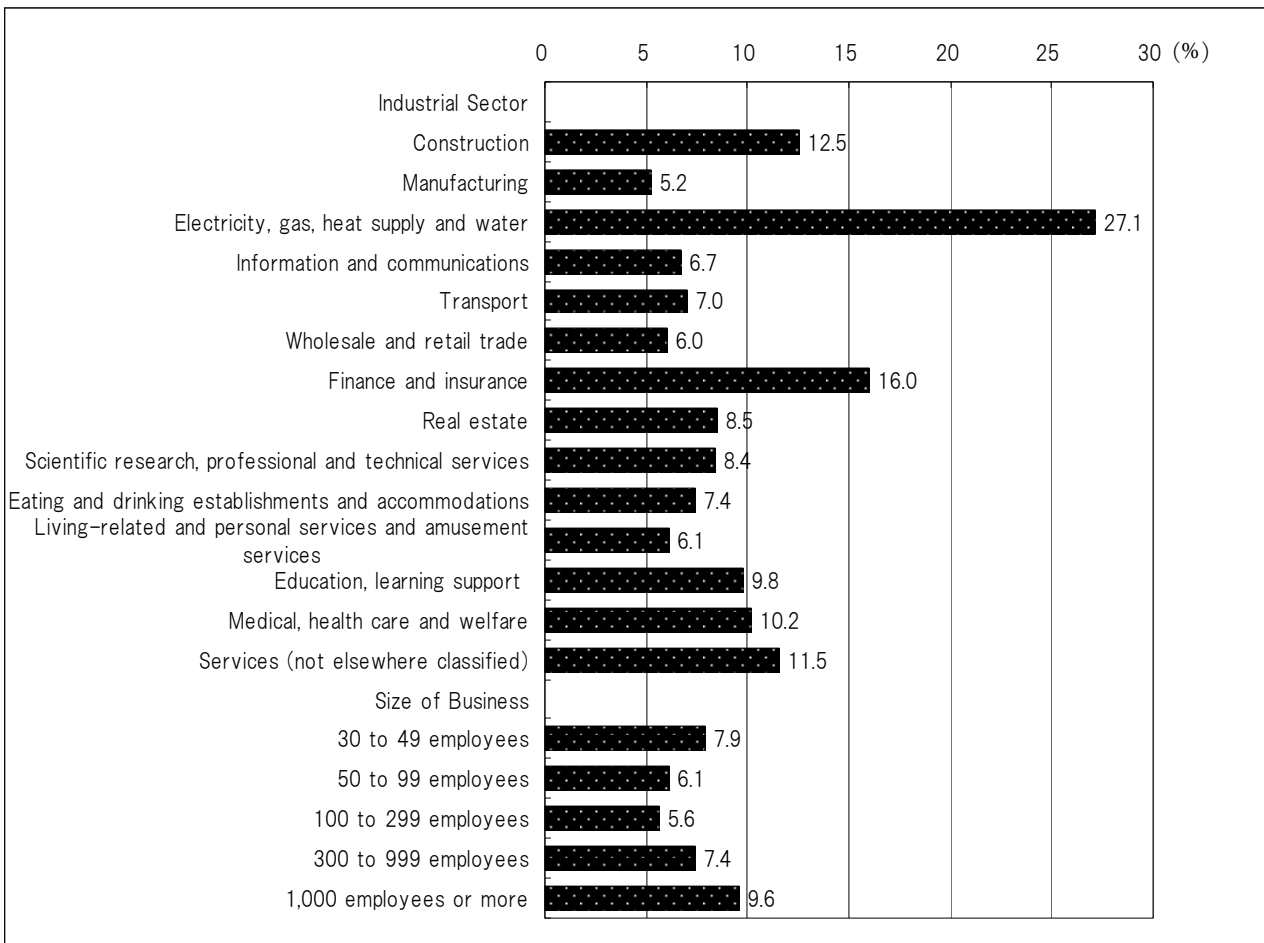


Figure 20 Businesses that implement a leave system for education and training (categorized by industrial sector and size of business)



3) The state of implementation of career consulting systems (Figures 21 to 23)

Only 4.5% (previous survey: 5.8%) of businesses implement a career consulting system. By industry, they were Finance and insurance (23.3%) and Electricity, gas, heat supply and water (20.5%). Categorized by size of the business, the proportion of businesses that implement career consulting systems tends to be higher among larger businesses, at 10.2% for businesses with 1,000 employees or more.

With regards to the specific reasons offered by businesses that do not implement a career consulting system, the proportion of businesses that responded “We did not know about the system” was high at 42.3%.

Figure 21 Businesses that implement a career consulting system (total)

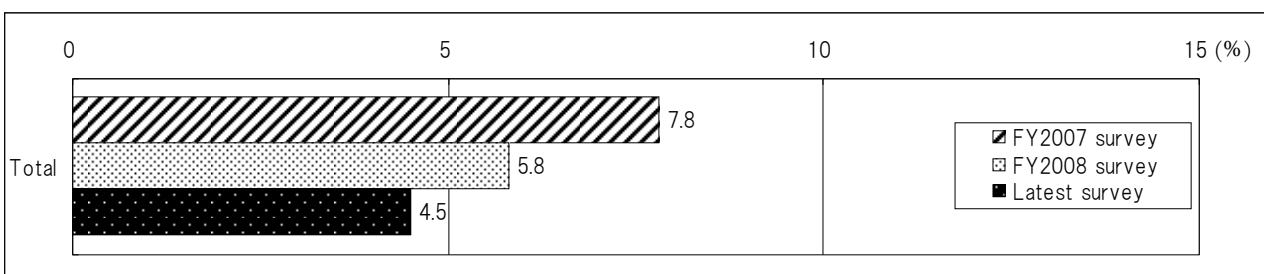


Figure 22 Businesses that implement a career consulting system (categorized by industrial sector and size of business)

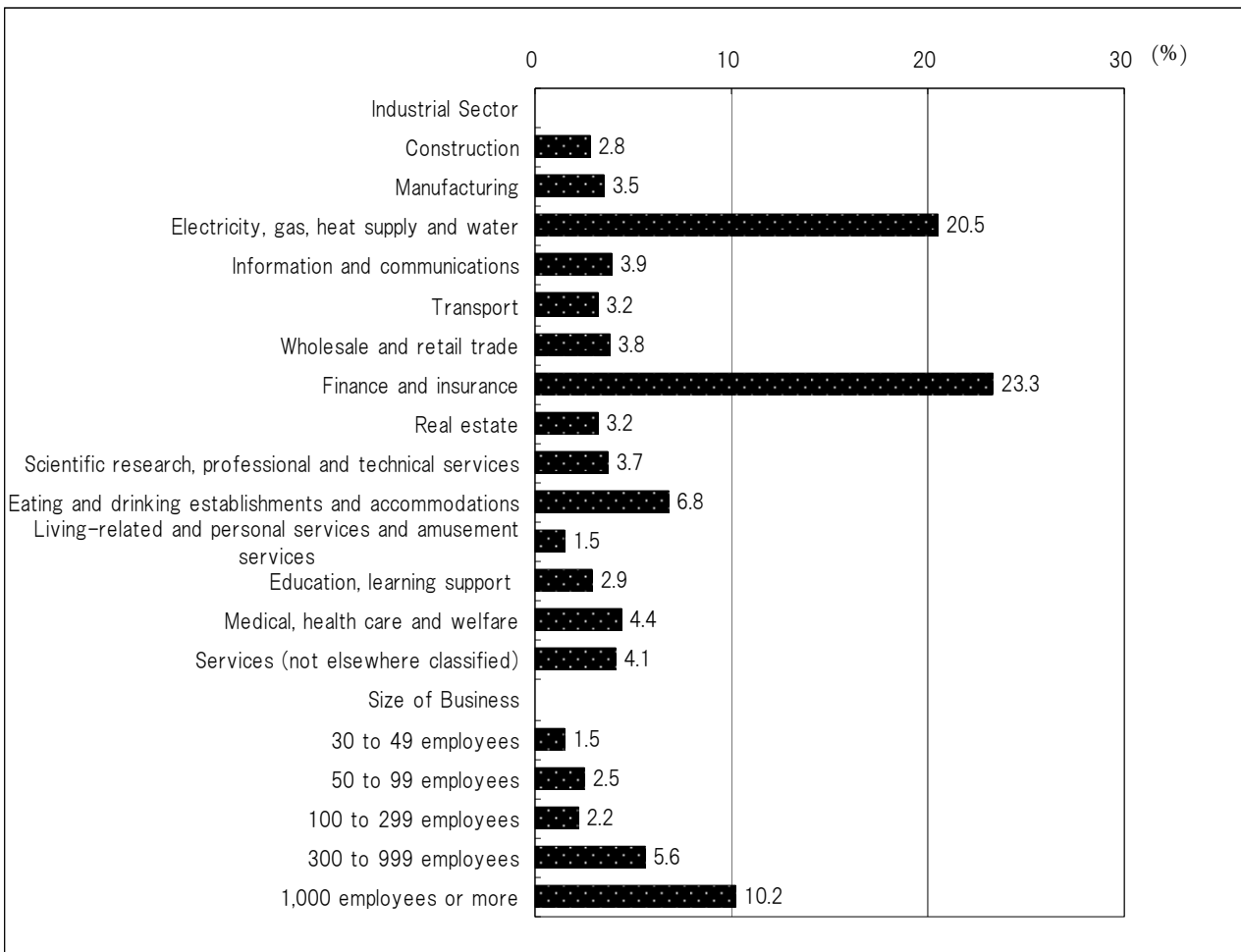
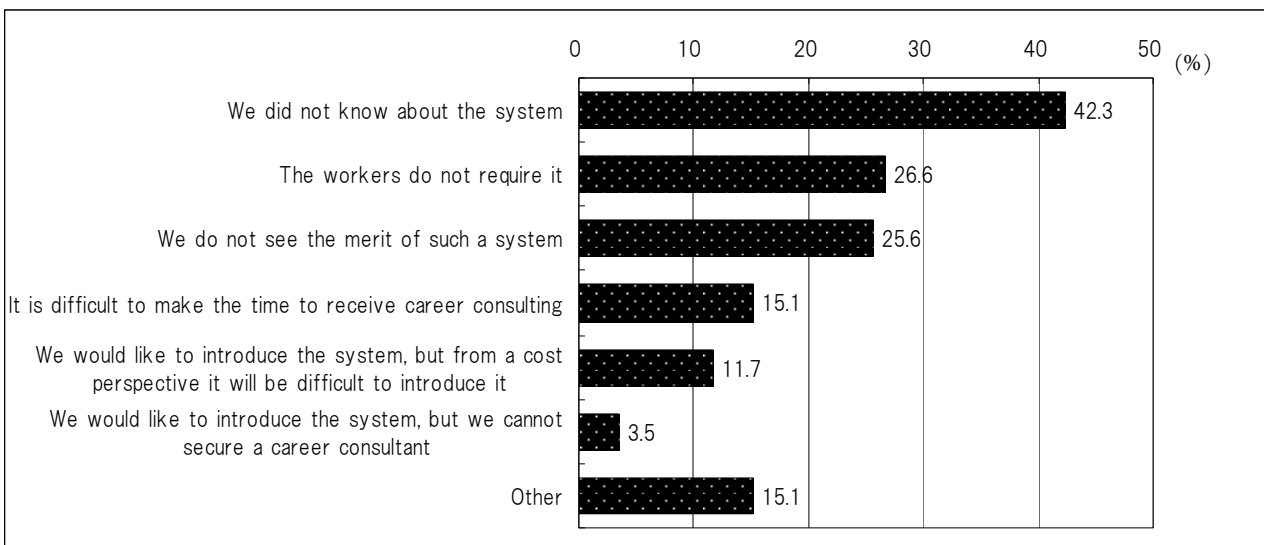


Figure 23 Reasons for not implementing a career consulting system



4) The state of provision of avenues for considering career planning (Figures 24 and 25)

43.2% (previous survey: 67.8%) of businesses provided avenues for considering career planning for regular employees. As the means of providing an avenue for career planning (multiple answers allowed), the ratio of the response “Consultation with superiors” was high at 86.8% (previous survey: 83.0%), while “Self-assessment system” was relatively high at 49.7% (previous survey: 39.8%).

On the other hand, 24.7% (previous survey: 48.4%) of businesses provided avenues for considering career planning for non-regular employees. As the means of providing an avenue for career planning (multiple answers allowed), similarly with regular employees, the ratio of the response “Consultation with superiors” was highest at 87.7% (previous survey: 84.1%).

Figure 24 Businesses that provide avenues for considering career planning (total)

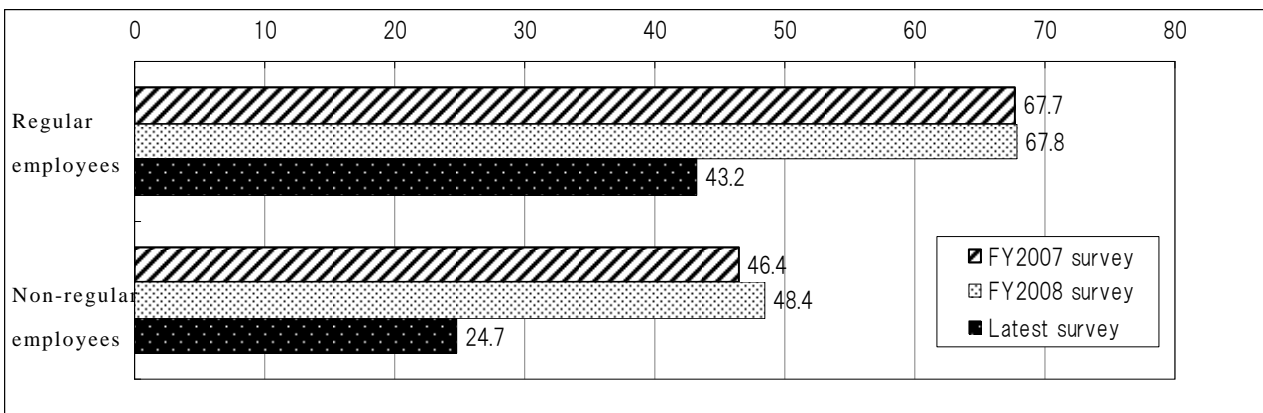
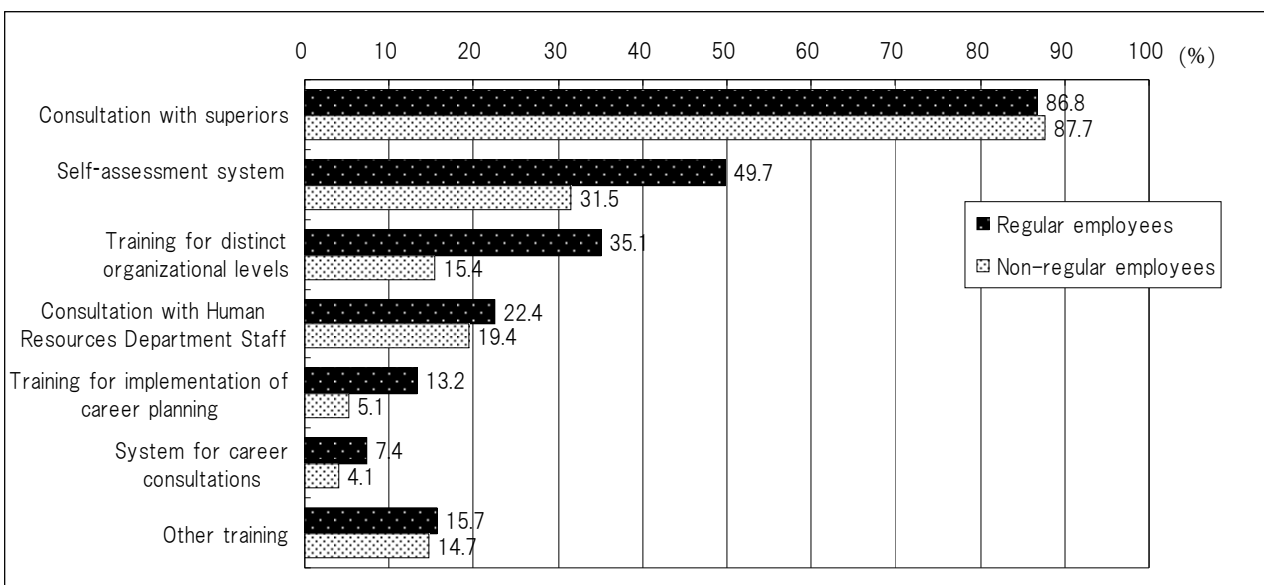


Figure 25 Means of providing avenues for considering career planning (multiple answers allowed)



5) The state of initiatives based on career planning (Figures 26 and 27)

35.3% (previous survey: 46.9%) of businesses took initiatives based on career planning for regular employees. The content of the initiatives is as follows (multiple answers allowed): “Placement of personnel based on a self-assessment system” (59.4% [previous survey: 47.8%]) was the highest, followed by “Placement of personnel taking career planning into consideration” (46.7% [previous survey: 47.0%]) and “Placement of personnel based on an in-house staff recruitment system” (29.6% [previous survey: 22.2%]).

On the other hand, 17.5% (previous survey: 27.4%) of businesses took initiatives based on career planning for non-regular employees. The content of the initiatives is as follows (multiple answers allowed): “Placement of personnel taking career planning into consideration” (49.0% [previous survey: 50.2%]) was the highest, followed by “Placement of personnel based on a self-assessment system” (43.2% [previous survey: 33.7%]).

Figure 26 Businesses that took initiatives based on career planning

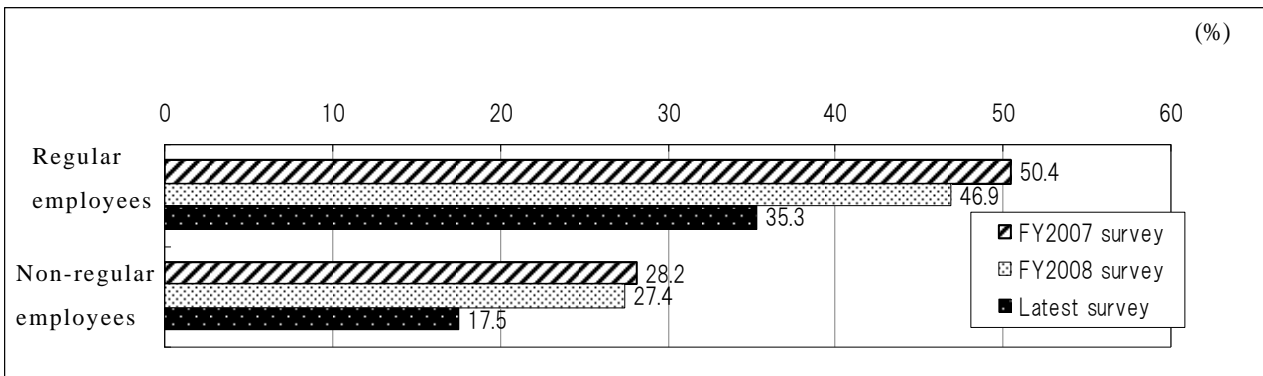
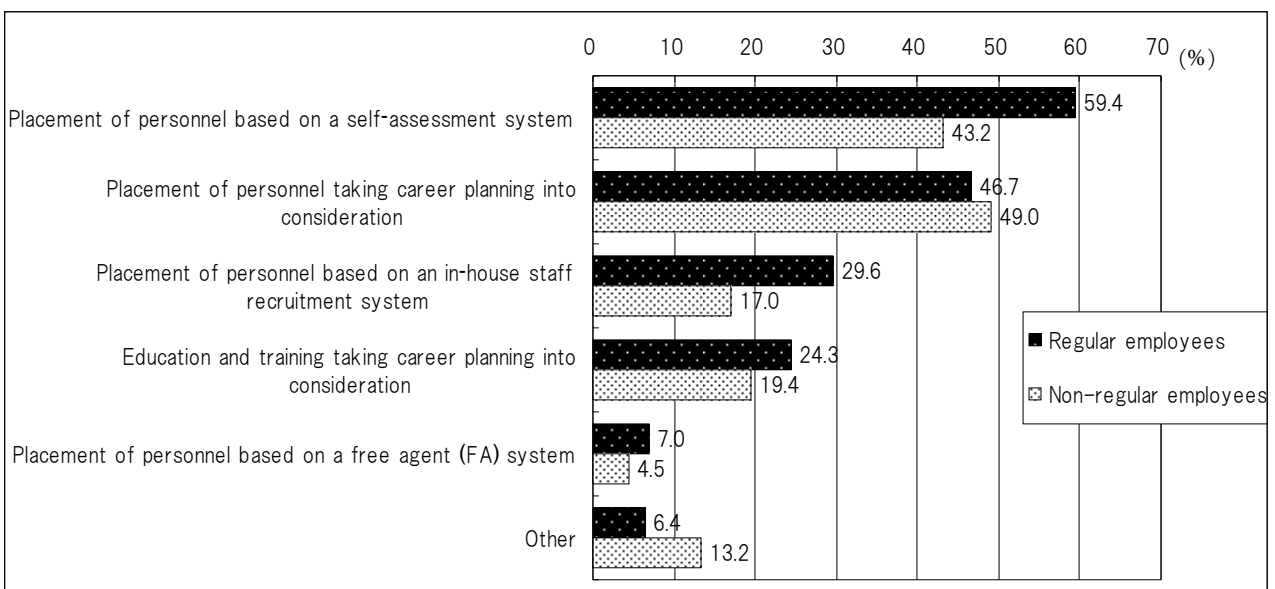


Figure 27 The nature of initiatives based on career planning (multiple answers allowed)



(4) Vocational Ability Evaluations

1) State of Implementation of Vocational Ability Evaluations (Figures 28 and 29)

The proportion of businesses that implemented vocational ability evaluations was 63.2% (previous survey: 60.3%). By industry, the proportions were as follows: Finance and insurance (83.1%), Electricity, gas, heat supply and water (75.9%) and so on were high, and Transport (53.0%), Living-related and personal services and amusement services (54.4%), Education, learning support (56.2%) and so on were low.

Figure 28 Businesses implementing vocational ability evaluations (total)

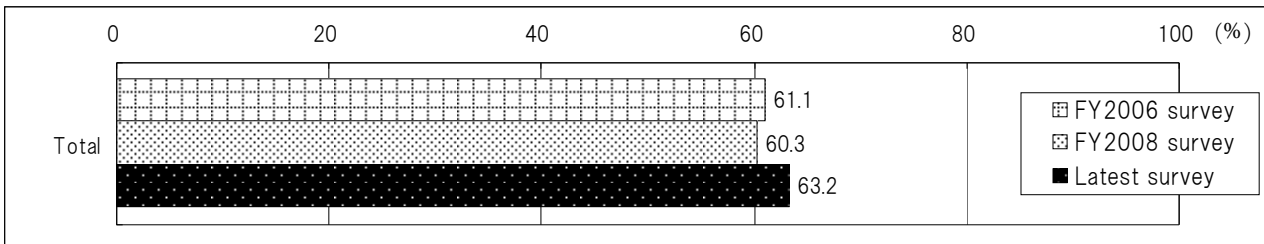
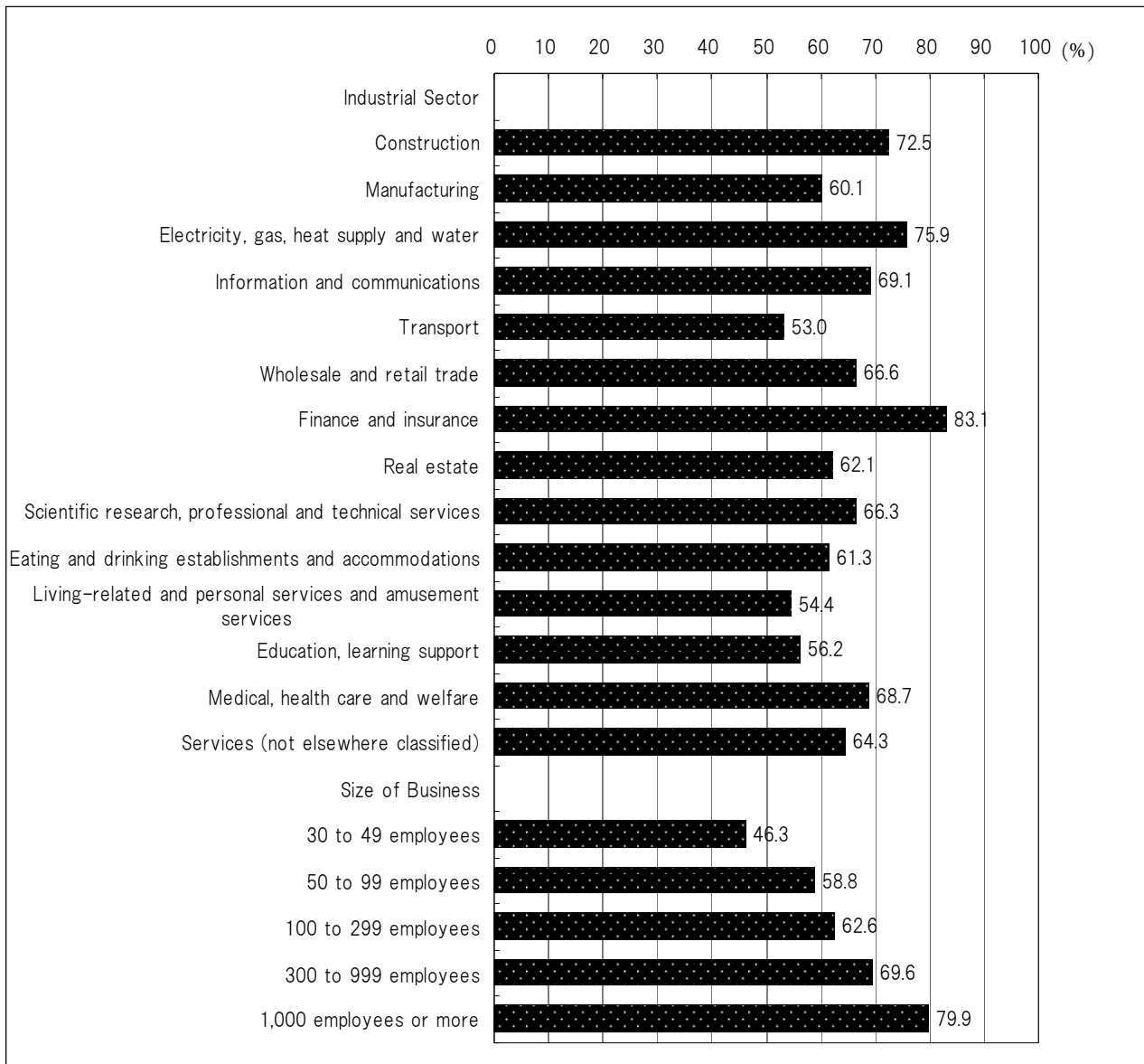


Figure 29 Businesses implementing vocational ability evaluations (Categorized by industrial sector and size of business)



2) Methods of utilization of vocational ability evaluations (Figure 30)

Concerning the method of utilization of vocational ability evaluations (multiple answers allowed), the response “Estimation standards for personnel merit evaluation” was the highest at 80.0% (previous survey: 77.6%), followed by “Achievement of appropriate assignment of human resources” at 59.1% (previous survey: 53.3%), and “Ascertaining the human resources development required by workers” at 41.9% (previous survey: 37.4%).

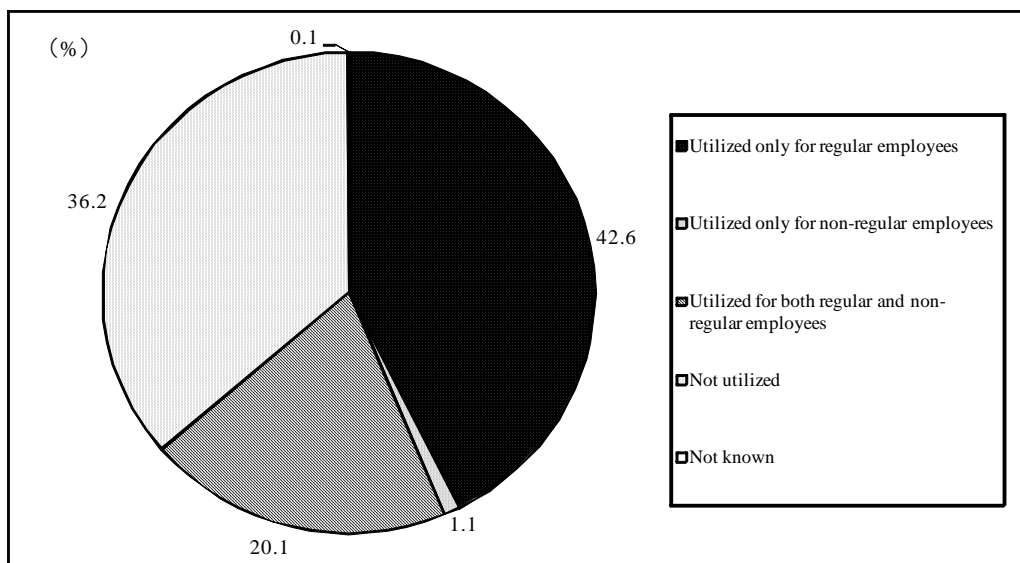
Figure 30 Methods of utilization of vocational ability evaluations (multiple answers allowed)



3) State of utilization of qualifications in vocational ability evaluations (Figures 31 and 32)

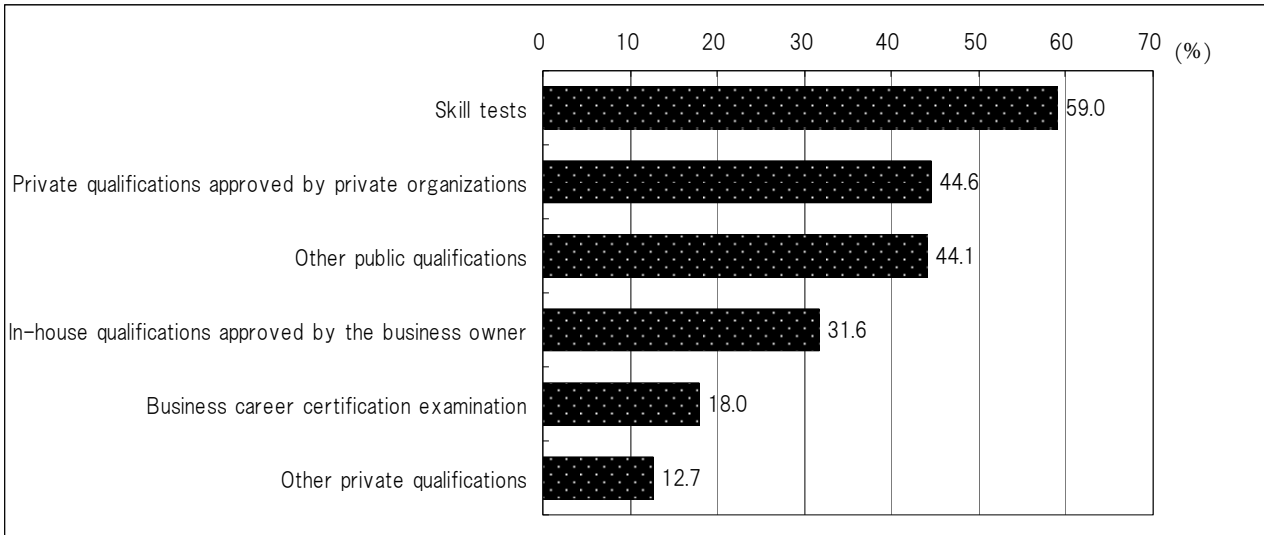
Concerning the state of utilization of qualifications in vocational ability evaluations among businesses that implemented vocational ability evaluations, 42.6% (previous survey: 40.7%) of businesses responded “Utilized only for regular employees”, 1.1% (previous survey: 1.0%) responded “Utilized only for non-regular employees”, and 20.1% (previous survey: 18.9%) responded “Utilized for both regular and non-regular employees”.

Figure 31 State of utilization of qualifications in vocational ability evaluations



In addition, for the utilized qualifications (multiple answers allowed for businesses that utilized qualifications for regular or non-regular employees), responses included “Skill examination” at 59.0%, “Other public qualifications” at 44.1%, and “Private qualifications approved by private organizations” at 44.6%.

Figure 32 Utilized qualifications (multiple answers allowed)



(5) Concerning succession of skills

1) Issues with succession of skills (Figures 33 and 34)

28.0% (previous survey: 28.1%) of businesses responded that there is an issue with the succession of skills when the baby-boom generation retires. By industry, the proportions were as follows: Electricity, gas, heat supply and water (46.1%), Manufacturing (44.8%), and Construction (42.4%) were high, whereas Eating and drinking establishments and accommodations (9.0%), Education, learning support (11.4%) and so on were low.

Figure 33 Businesses that responded that there is an issue with the succession of skills when the baby-boom generation retires (total)

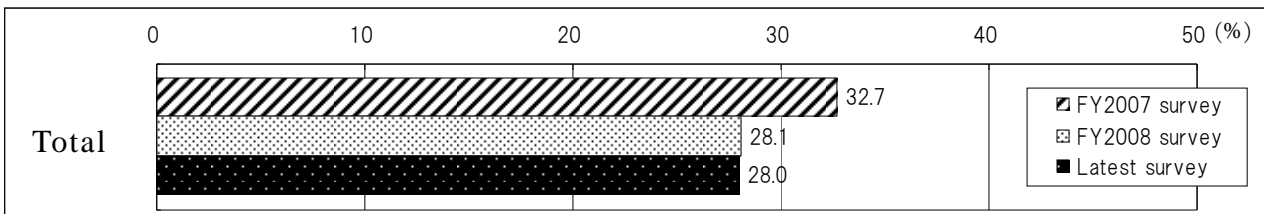
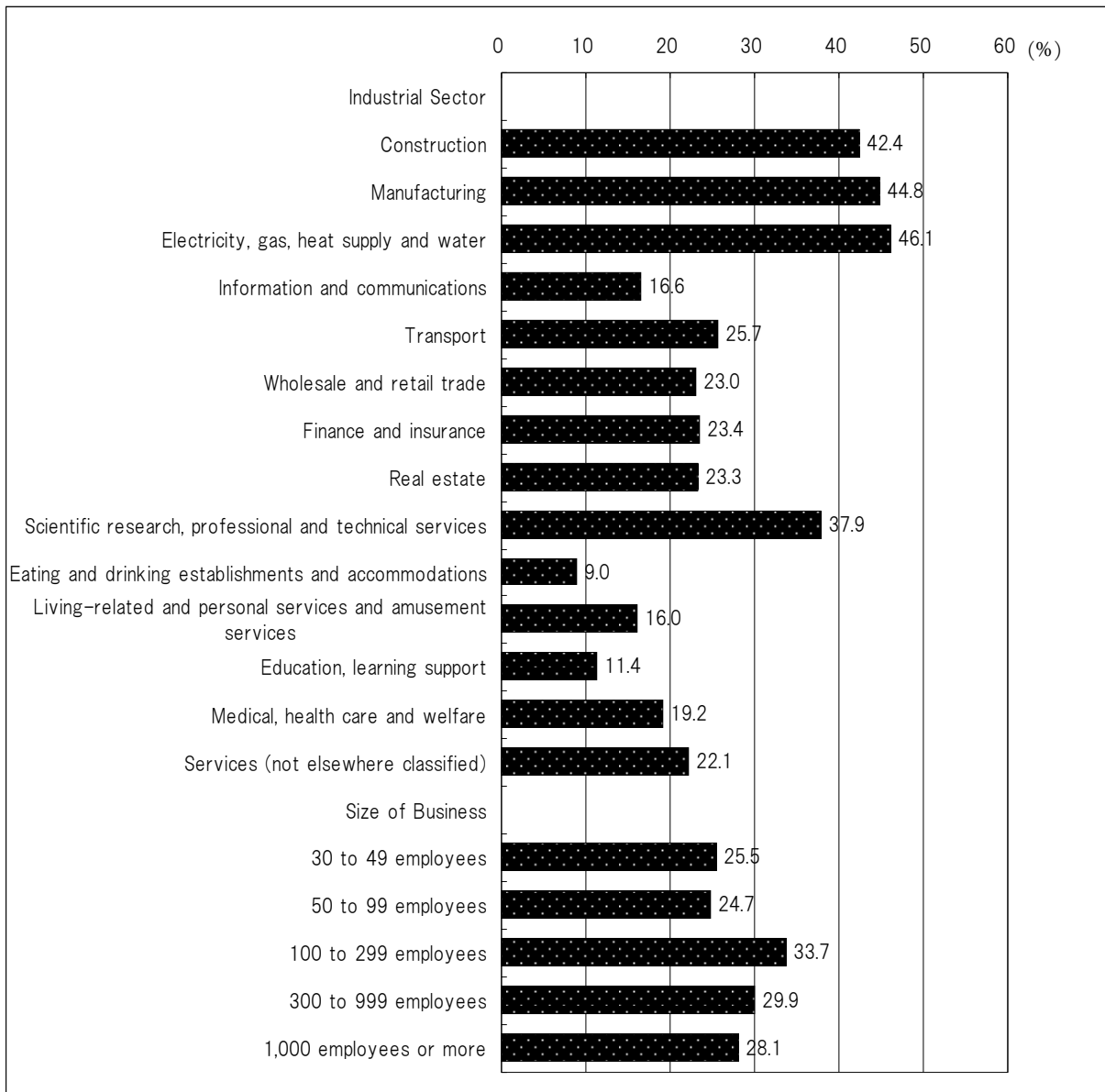


Figure 34 Businesses that responded that there is an issue with the succession of skills when the baby-boom generation retires (categorized by industrial sector and size of business)



2) The state of initiatives concerning succession of skills (Figures 35 and 36)

80.0% (previous survey: 68.8%) of businesses responded “We are undertaking initiatives” in response to the issue of succession of skills.

Concerning the content of initiatives (multiple answers allowed), the highest proportion of responses was, “We pick out necessary employees from among retirees and reemploy them by extending their employment or through part-time employment to use as instructors” at 64.3% (previous survey: 56.4%). Other high response ratios include, “We are increasing mid-career hiring” (27.7% [previous survey: 37.9%]), “We pass on skills, knowhow, etc. to young and middle-aged staff through special education and training for the succession of skills” (22.8% [previous survey: 18.3%]), and “We are documenting, creating databases, and making manuals of skills, knowhow, etc. of workers who are expected to retire that must be passed on” (21.0% [previous survey: 17.3%]).

Figure 35 Businesses that are taking initiatives towards the succession of skills (total)

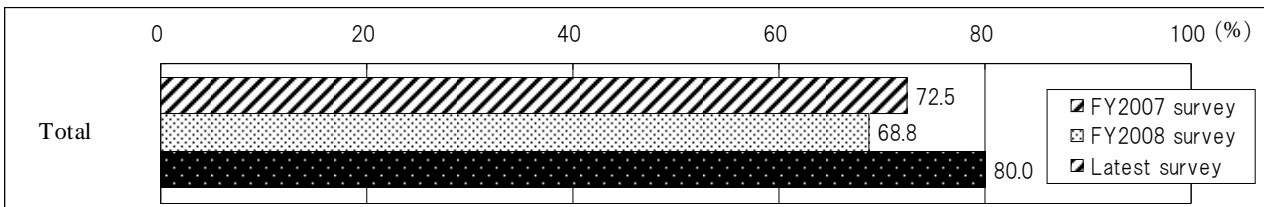
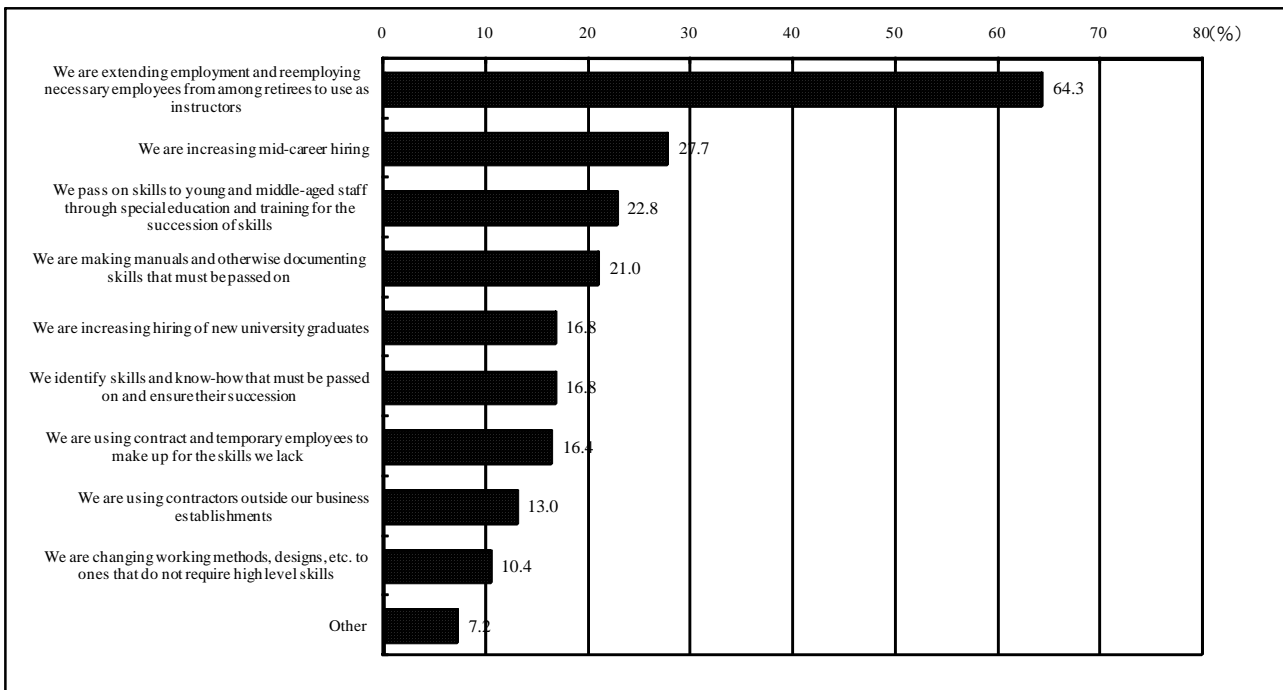


Figure 36 The nature of initiatives taken by businesses towards the succession of skills (multiple answers allowed)



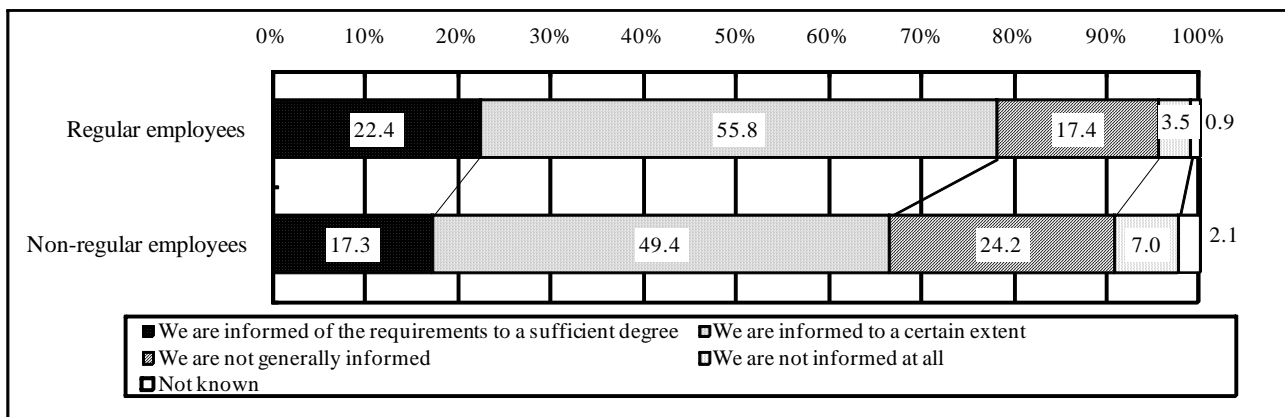
3. Individual Survey

(1) Education and training attended through the company

1) Awareness of the ability required of workers (Figure 37)

Concerning awareness of the ability required of workers, 22.4% (previous survey: 25.6%) of regular employees reported “We are informed of the requirements to a sufficient degree”, while 55.8% (previous survey: 51.9%) responded “We are informed to a certain extent”, which means that 78.2% (previous survey: 77.5%) of workers are informed of the requirements. On the other hand, 17.3% (previous survey: 17.7%) of non-regular employees reported “We are informed of the requirements to a sufficient degree”, while 49.4% (previous survey: 46.0%) responded “We are informed to a certain extent”, representing a lower ratio than regular employees. A relatively high ratio of 31.2% (previous survey: 32.9%) responded “We are generally not informed”, or “We are not informed at all”.

Figure 37 Awareness of the ability required of workers



2) The state of participation in off the job training (Figures 38 and 39)

The ratio of workers who participated in off the job training in fiscal 2008 was 38.5% (previous survey: 54.2%) of regular employees and 16.9% (previous survey: 28.7%) of non-regular employees. By industry, for regular employees, the proportions were as follows: Electricity, gas, heat supply and water (55.7%) and so on were high, whereas Transport (25.5%), Eating and drinking establishments and accommodations (26.0%), Living-related and personal services and amusement services (26.4%) and so on were low. For non-regular employees, the proportions were as follows: Finance and insurance (30.8%) and so on were high, whereas Living-related and personal services and amusement services (10.8%), Eating and drinking establishments and accommodations (12.6%) and so on were low. Between regular and non-regular employees, there were large differences in the ratio of workers who participated in off the job training in the following industries: Electricity, gas, heat supply and water, Manufacturing, Information and communications, and so on.

Categorized by size of the business, there is a tendency towards a higher proportion of regular employees of larger businesses participating in off the job training. The proportion is close to 50% for businesses with 1,000 or more employees. On the other hand, with non-regular employees, the relation to size of the business is not as clearly defined compared with regular employees.

Figure 38 Workers who participated in off the job training (total)

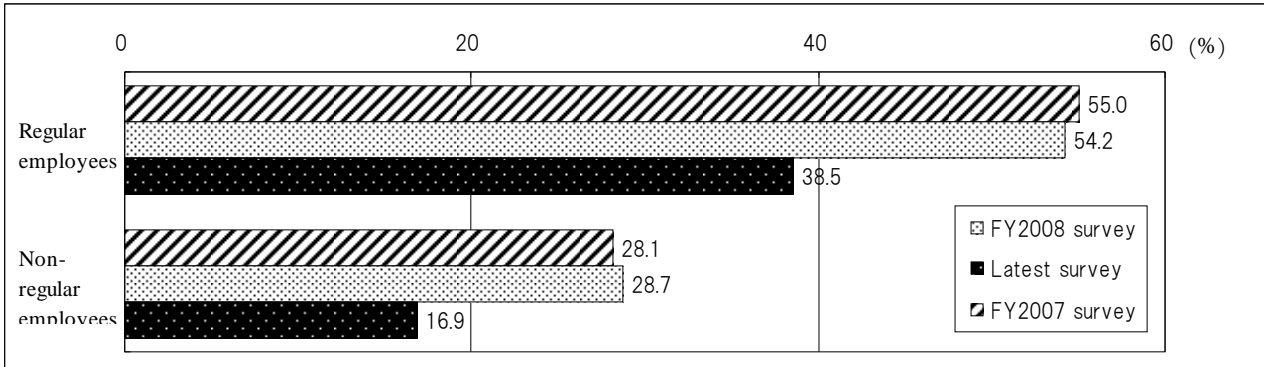
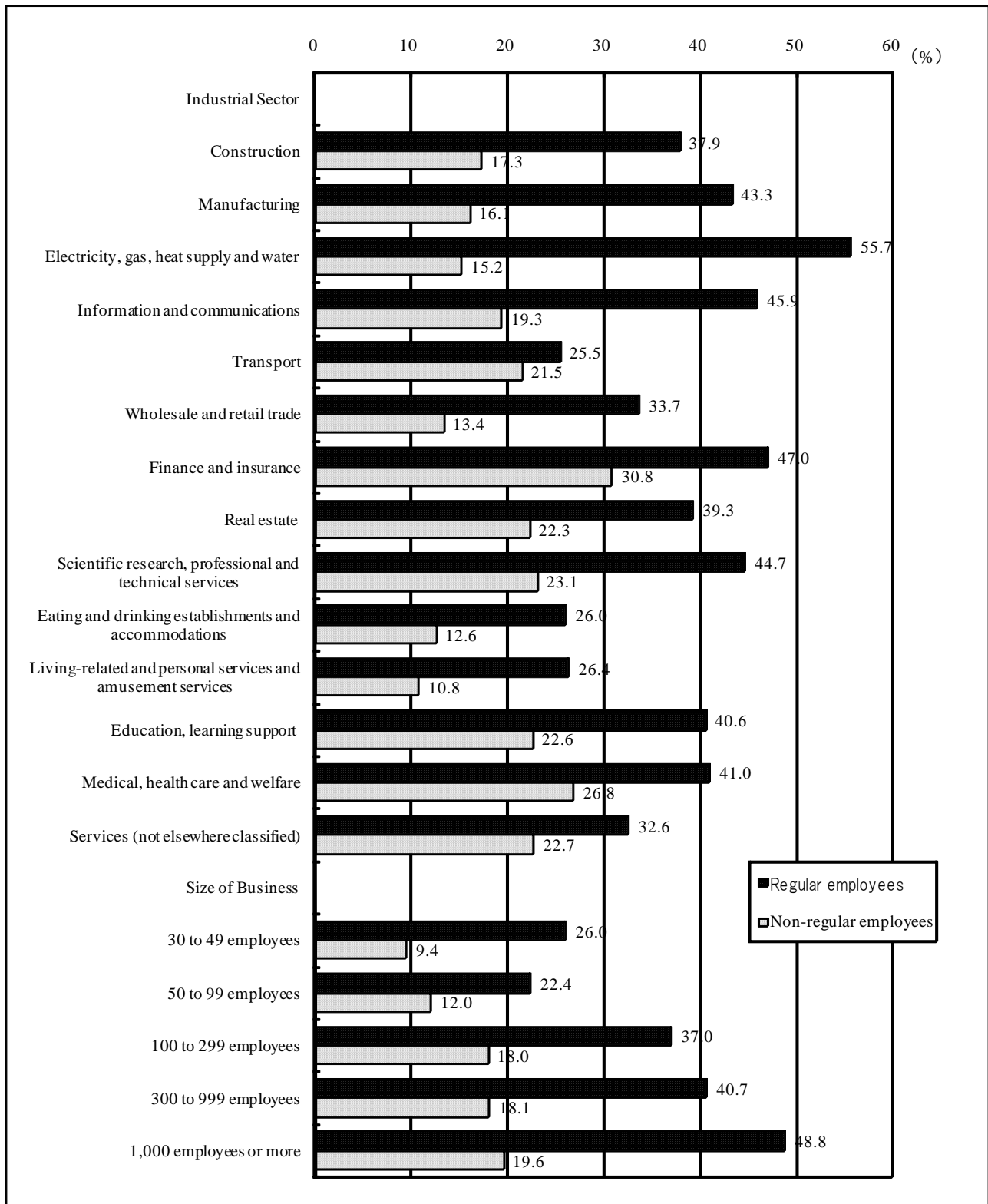


Figure 39 Workers who participated in off the job training (categorized by industrial sector and size of business)



3) The nature of off the job training attended (Figures 40 to 42)

Concerning the nature of off the job training attended (multiple answers allowed), the ratio of regular employees who responded “Management (e.g., enhancement of management and oversight skills)” was the highest at 36.1%, followed by “Product quality and safety” (26.8%), “Basic knowledge about business, including business manner”

(22.3%), and “Human resources and labor” (21.7%).

On the other hand, for non-regular employees, the ratio for “Product quality and safety” was the highest at 24.9%, followed by “Basic knowledge about business, including business manner” (23.4%), “Technology and techniques” (20.8%), and “Sales” (15.7%).

The average total number of hours spent in attending off the job training was 41.3 hours (previous survey: 34.6 hours) for regular employees and 19.0 hours (previous survey: 16.5 hours) for non-regular employees.

Figure 40 The nature of off the job training attended (multiple answers allowed)

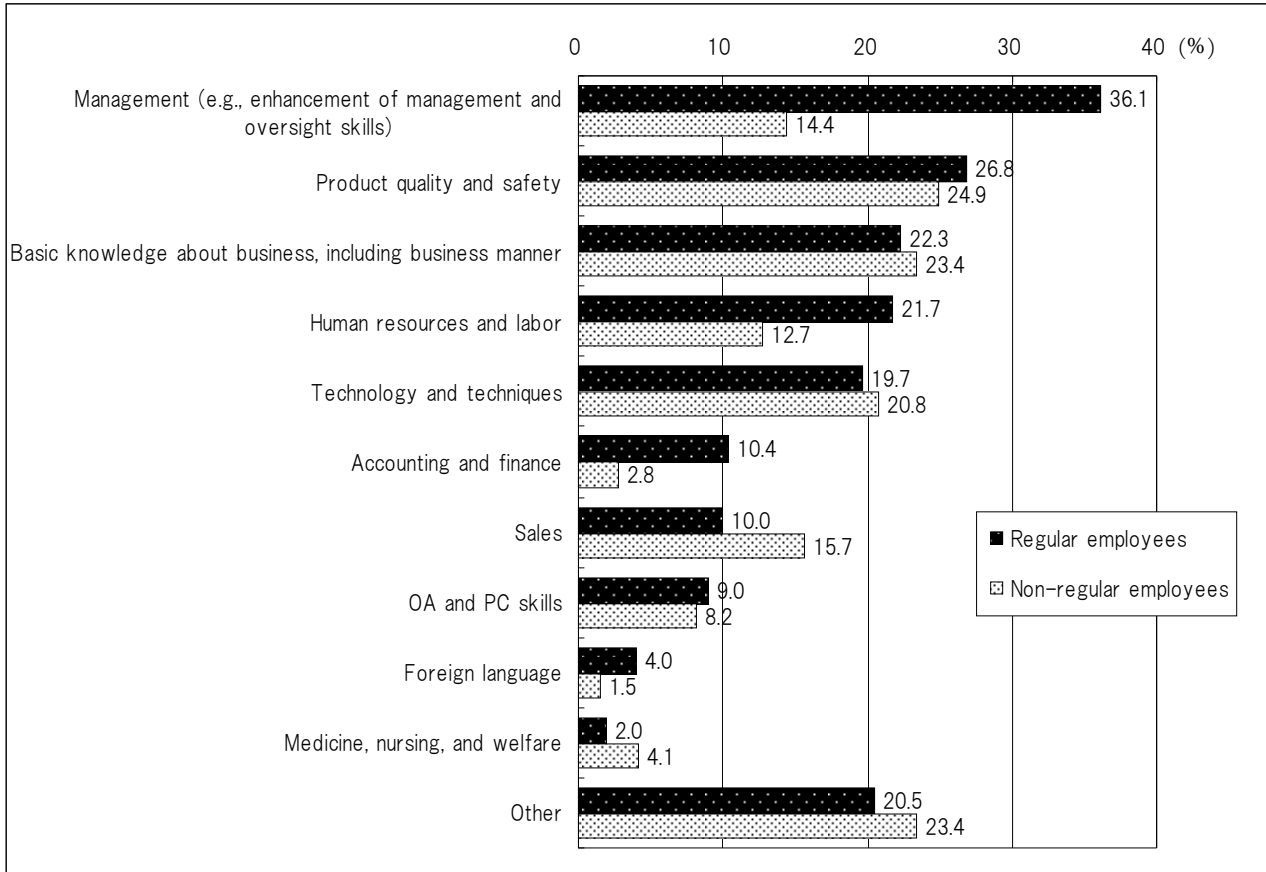


Figure 41 Average total number of hours of off the job training attended by workers (total)

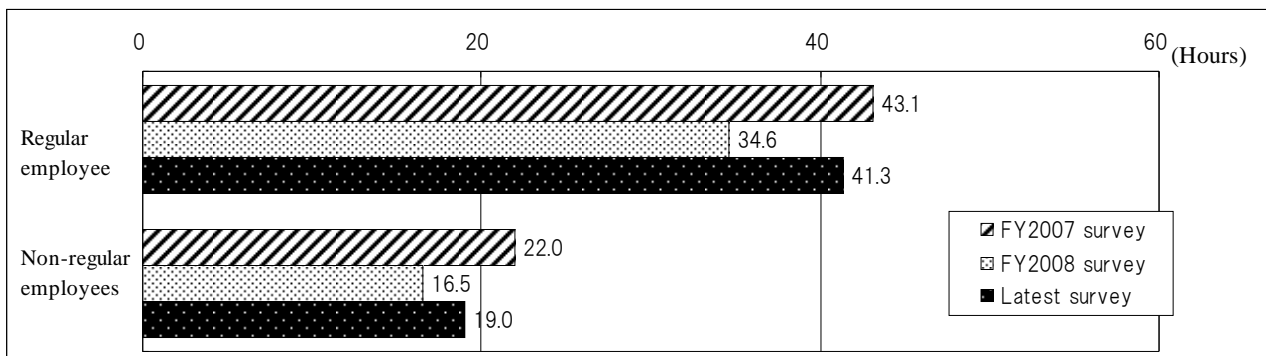
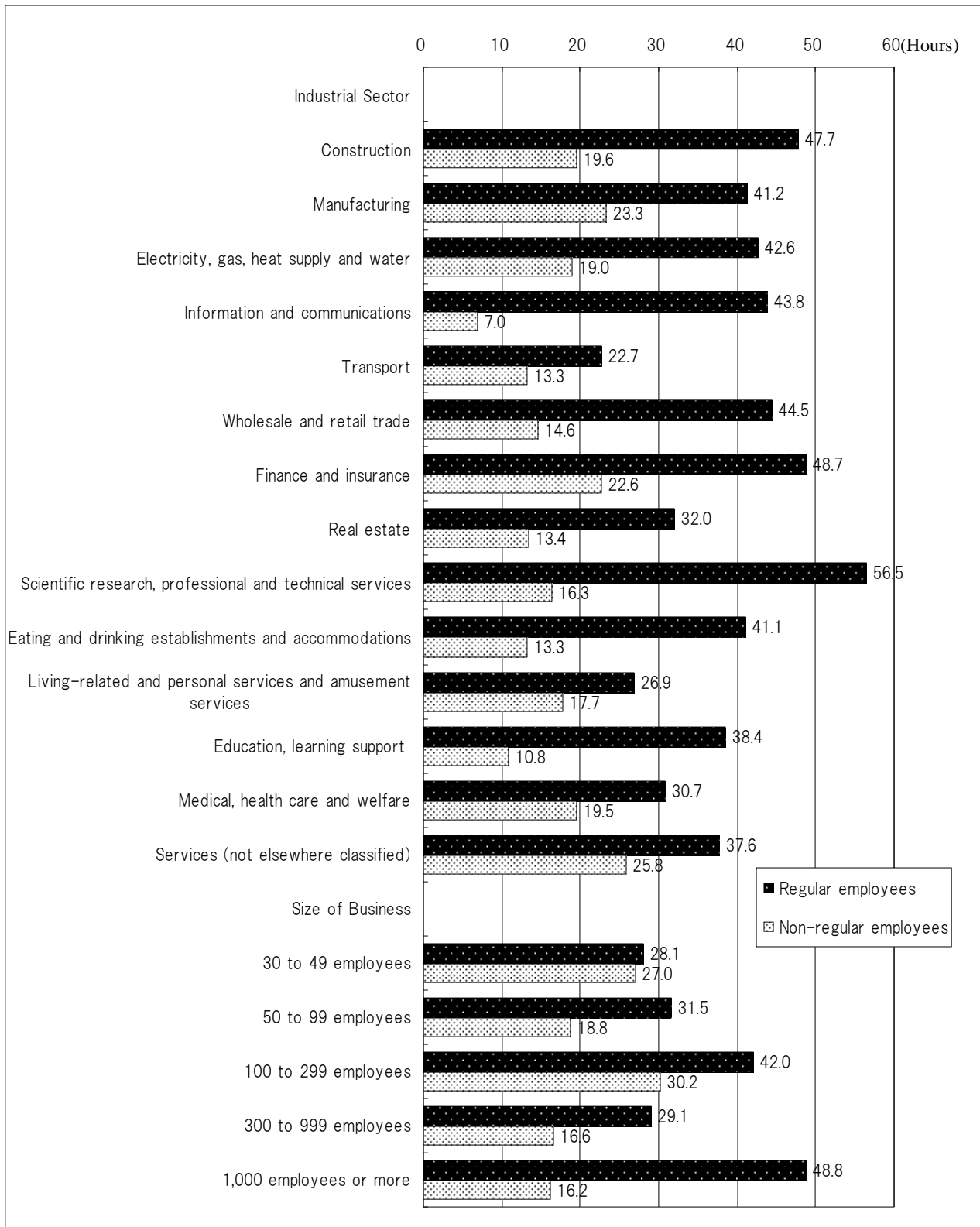


Figure 42 Average total number of hours of off the job training attended by workers (total)

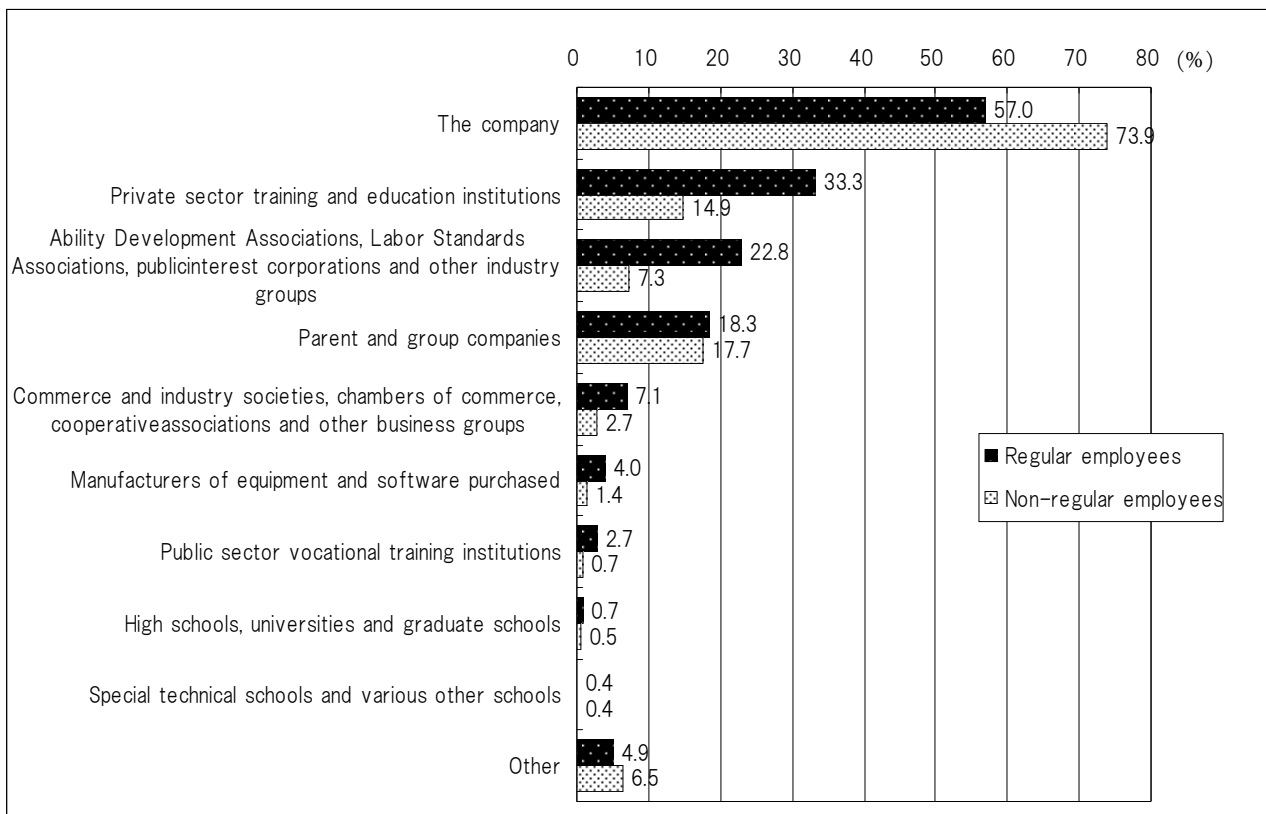


4) Entities that provide off the job training (Figure 43)

The entities that provided the off the job training were as follows (multiple answers allowed): For regular employees, “The company” was the highest at 57.0% (previous survey: 62.6%), followed by “Private sector training and education institutions” (33.3% [previous survey: 28.4%]), and “Ability Development Associations, Labor Standards Associations, public interest corporations and other industry groups” (22.8% [previous survey: 22.8%]), and “Parent and group companies” (18.3% [previous survey: 16.8%]).

On the other hand, for non-regular employees, “The company” was especially high at 73.9% (previous survey: 74.0%), followed by “Parent and group companies” (17.7% [previous survey: 16.7%]), “Private sector training and education institutions” (14.9% [previous survey: 9.5%]).

Figure 43 The types of training and education institutions for off the job training attended (multiple answers allowed)

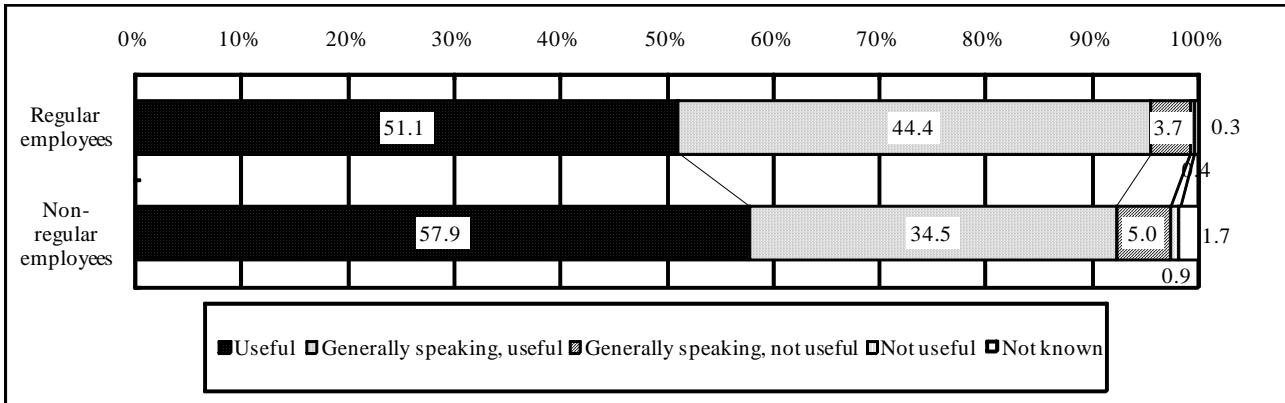


5) The usefulness of off the job training attended (Figure 44)

Concerning the usefulness of the off the job training attended, 51.1% (previous survey: 46.0%) of regular employees responded that it was “Useful”, and 44.4% (previous survey: 47.0%) responded that it was “Generally speaking, useful”, which represents a positive response rate in the 90% range (95.5% [previous survey: 93.0%]).

Similarly among non-regular employees, 57.9% (previous survey: 48.2%) responded that it was “Useful”, and 34.5% (previous survey: 43.8%) responded that it was “Generally speaking, useful”, which represents a positive response rate of around 90% (92.4% [previous survey: 92.0%]).

Figure 44 The usefulness of off the job training attended



(2) The state of implementation of self-development

1) The state of implementation of self-development (Figures 45 and 46)

The ratio of workers who undertook self-development in fiscal 2008 was 42.1% (previous survey: 58.1%) of regular employees and 20.0% (previous survey: 37.3%) of non-regular employees. For both regular and non-regular employees, the ratio of workers who undertook self-development decreased from the previous fiscal year.

The average total number of hours spent in self-development by each worker was 74.3 hours (previous survey: 70.3 hours) for regular employees and 66.5 hours (previous survey: 73.6 hours) for non-regular employees. In the category for time spent, the rate of response for “10 to 30 hours” was high for both regular employees and non-regular employees.

Figure 45 Workers who undertook self-development

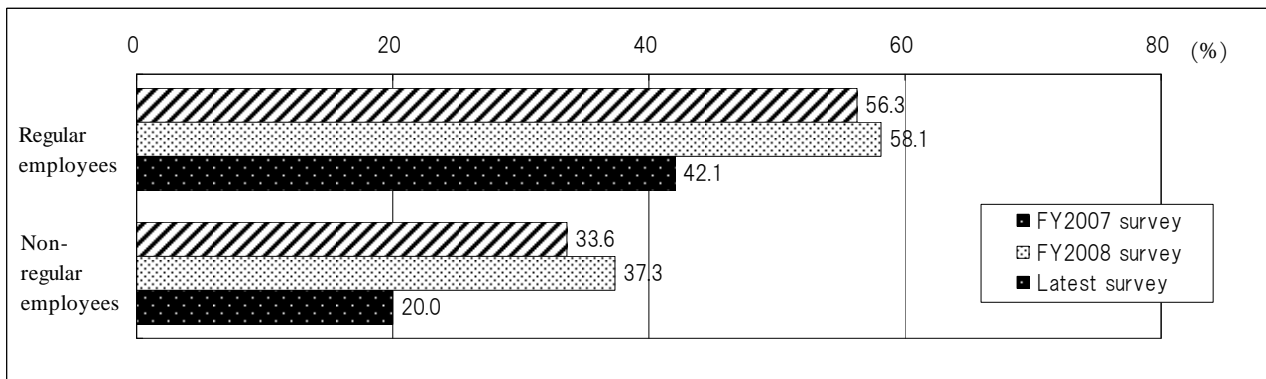
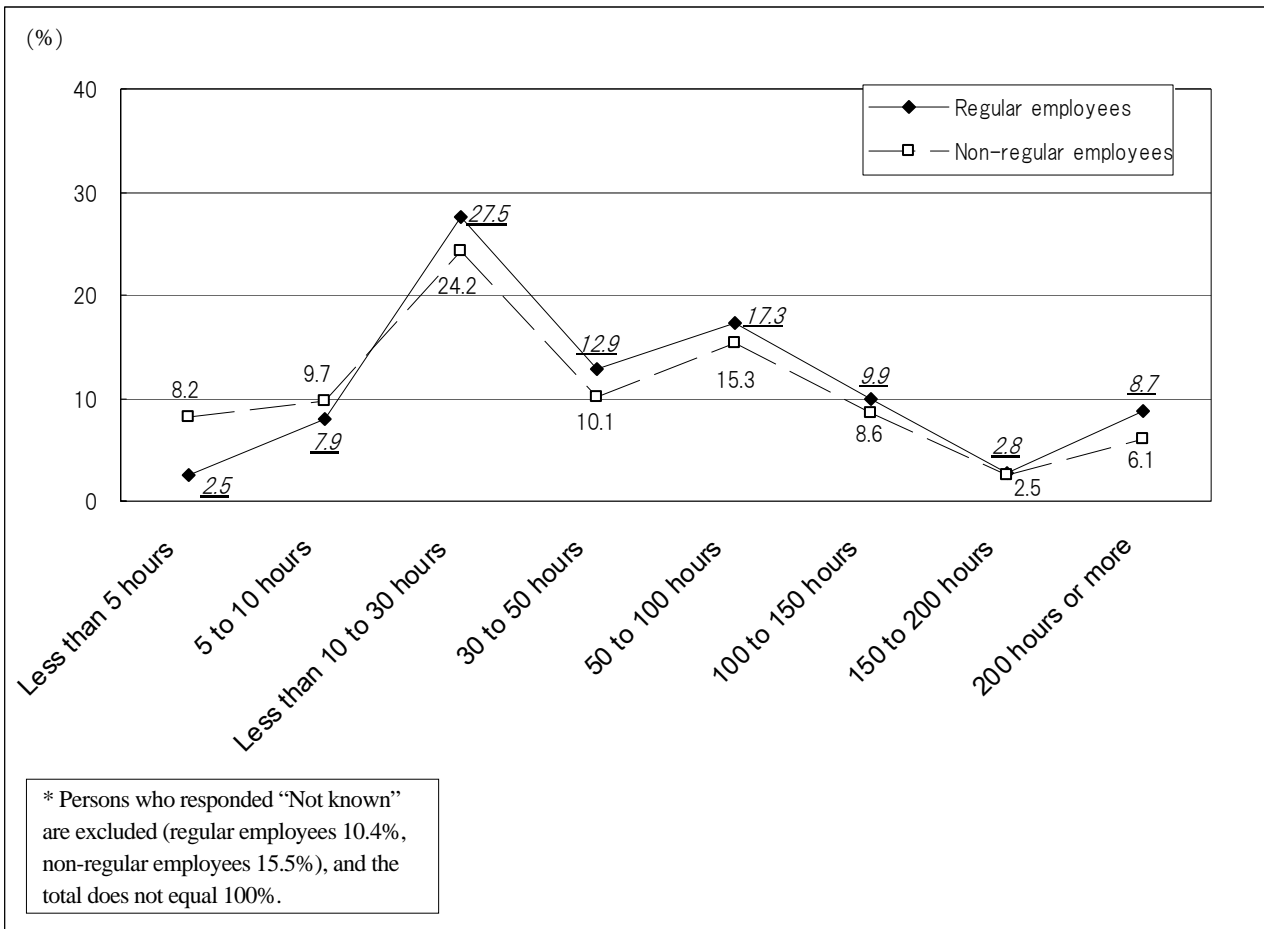


Figure 46 Average total number of hours spent in self-development



2) Methods used for self-development (Figures 47 and 48)

The methods used for self-development were as follows (multiple answers allowed): For regular employees, "Self-study using radio, TV, textbooks, the Internet etc." was highest at 47.1% (previous survey: 46.6%), followed by "Participation in in-house autonomous study groups" (23.8% [previous survey: 30.3%]), "Participation in workshops and seminars at private sector training and education institutions" (22.3% [previous survey: 22.8%]), and "Participation in external study groups" (19.3% [previous survey: 18.9%]).

For non-regular employees, "Self-study using radio, TV, textbooks, the Internet etc." was highest at 40.8% (previous survey: 48.2%), followed by "Participation in in-house autonomous study groups" (31.0% [previous survey: 25.3%]). The responses are similar to those of regular employees. On the other hand, the ratio of "Participation in workshops and seminars at private sector training and education institutions" (13.6% [previous survey: 16.1%]), "Participation in external study groups" (13.7% [previous survey: 10.5%]) and so on was lower than it was for regular employees.

In addition, of workers who undertook self-development, the ratio that received assistance with expenses was 36.4% (previous survey: 29.8%) of regular employees and 28.0% (previous survey: 18.4%) of non-regular employees.

Figure 47 The methods used for self-development (multiple answers allowed)

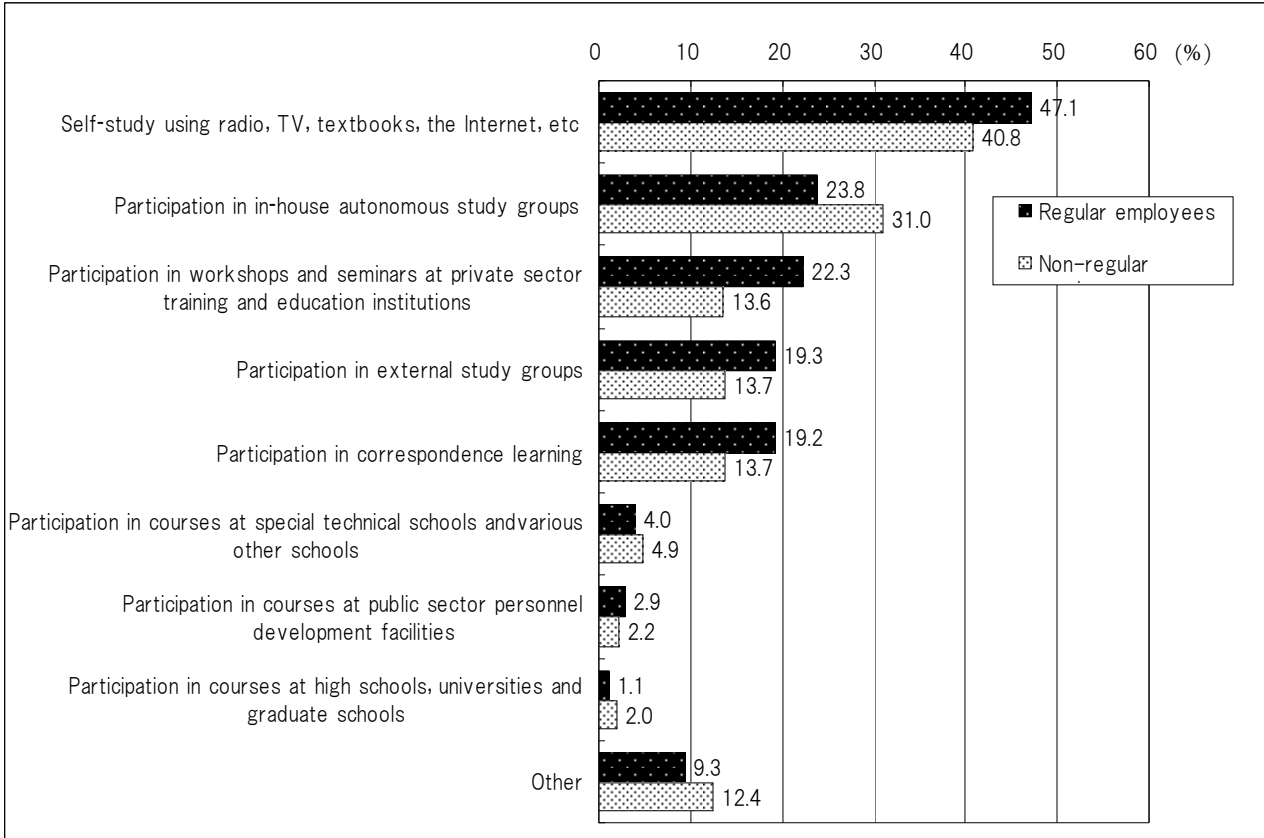
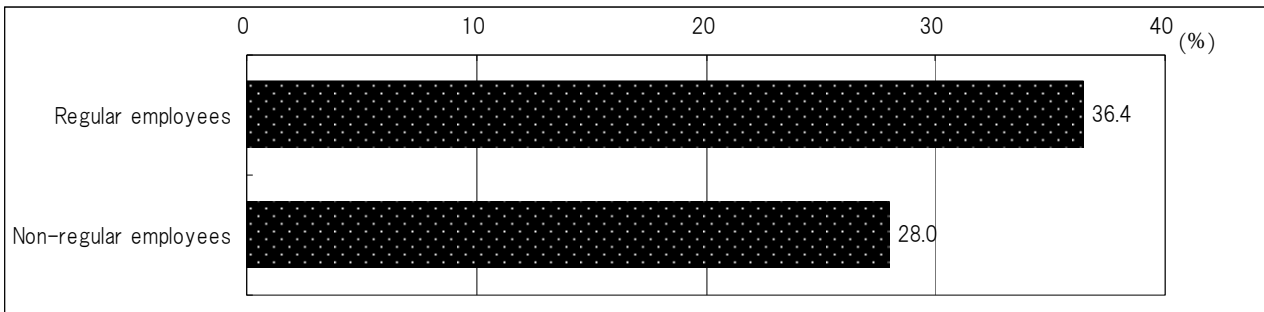


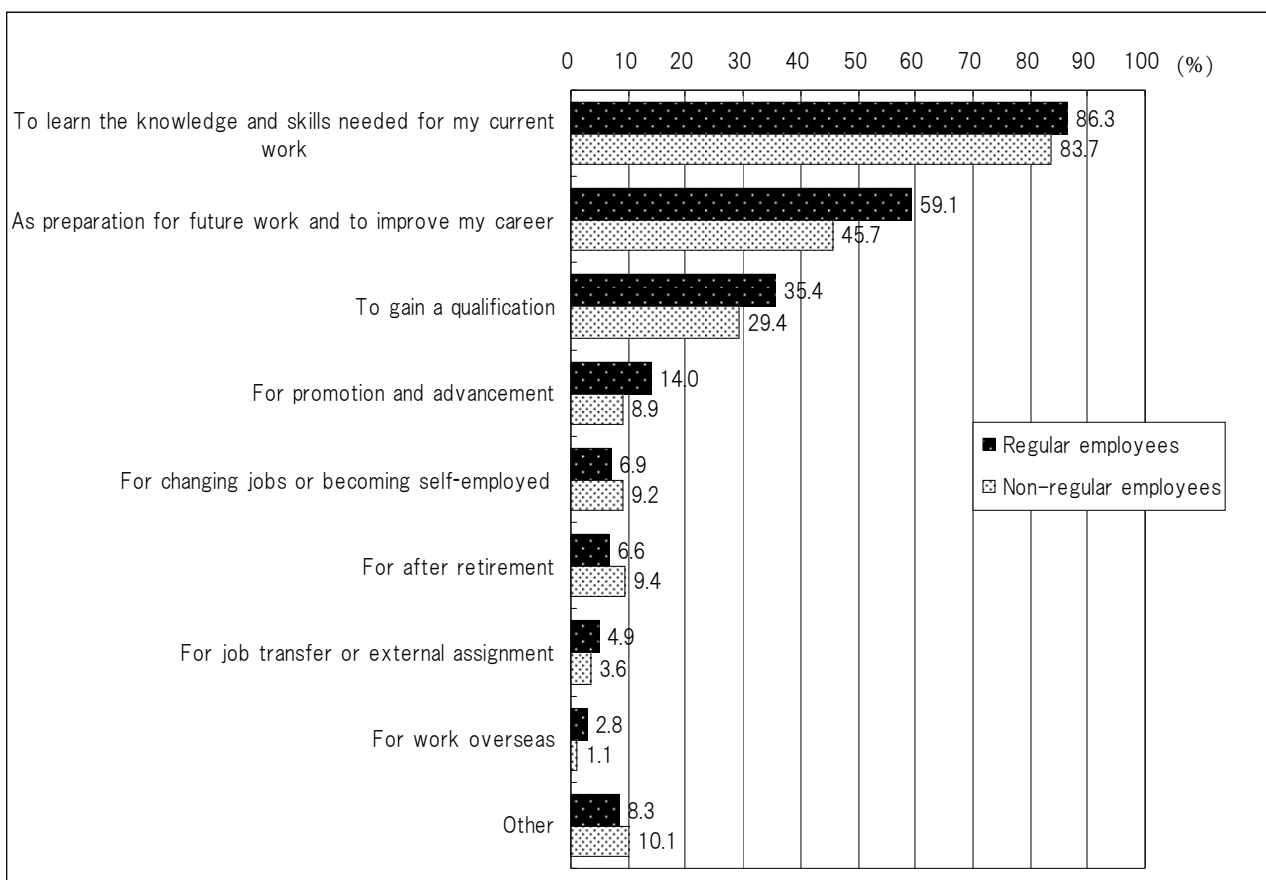
Figure 48 Workers who received assistance with expenses for self-development



3) Reasons for undertaking self-development (Figure 49)

The main reasons for undertaking self-development were as follows (multiple answers allowed): For regular employees, the ratio of the response “To learn the knowledge and skills needed for my current work” was especially high at 86.3% (previous survey: 78.6%), followed by “As preparation for future work and to improve my career” at 59.1% (previous survey: 48.0%), and “To gain a qualification” at 35.4% (previous survey: 29.0%). There was a similar trend for non-regular employees, with “To learn the knowledge and skills needed for my current work” at 83.7% (previous survey: 66.8%), “As preparation for future work and to improve my career” at 45.7% (previous survey: 30.3%), and “To gain a qualification” at 29.4% (previous survey: 25.7%).

Figure 49 Reasons for undertaking self-development (multiple answers allowed)



4) Issues with self-development (Figures 50 and 51)

The ratio of workers who responded that there are issues with self-development was 80.8% (previous survey: 77.1%) of regular employees and 74.5% (previous survey: 70.1%) of non-regular employees.

Concerning the nature of the issues with self-development (multiple answers allowed), the response “I’m too busy with work and have no time for self-development” was the highest for regular employees at 55.8% (previous survey: 59.0%), followed by “It costs too much” at 37.7% (previous survey: 35.0%). These were followed by “I don’t know what sort of course is appropriate for the career I’m aiming for” (20.2% [previous survey: 14.3%]), “The results of self-development are not valued within the company” (19.3% [previous

survey: 16.8%]), “I cannot find an appropriate training and education institution” (18.0% [previous survey: 15.2%]) and so on.

For non-regular employees, the ratio responding “I’m too busy with work and have no time for self-development” was also the highest at 36.5% (previous survey: 36.2%), but this percentage was low compared with regular employees. Different trends were also observed between regular and non-regular employees concerning issues with self-development, including a high ratio of non-regular employees responding “I’m too busy with family matters and childcare and have no time for self-development” (31.8% [previous survey: 32.9%]).

Figure 50 Workers who responded that there are issues with self-development

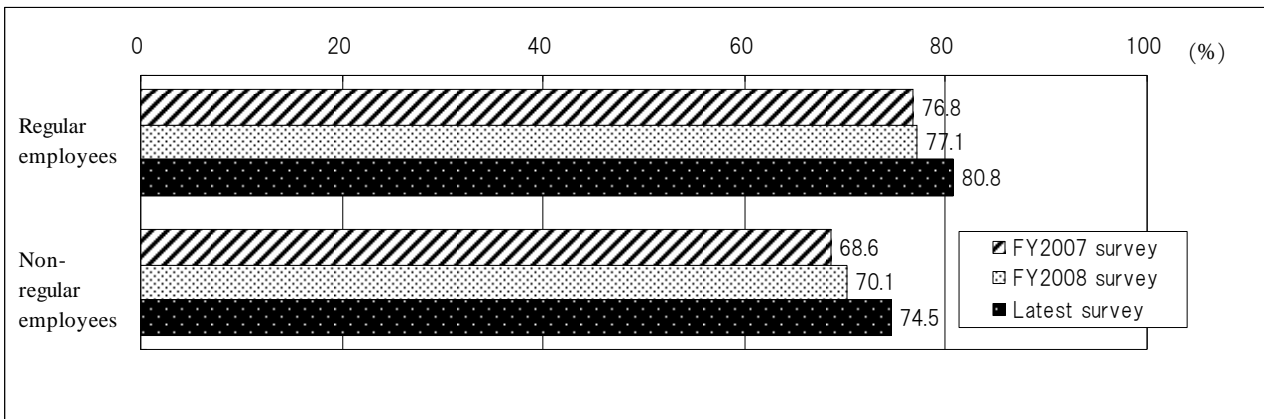
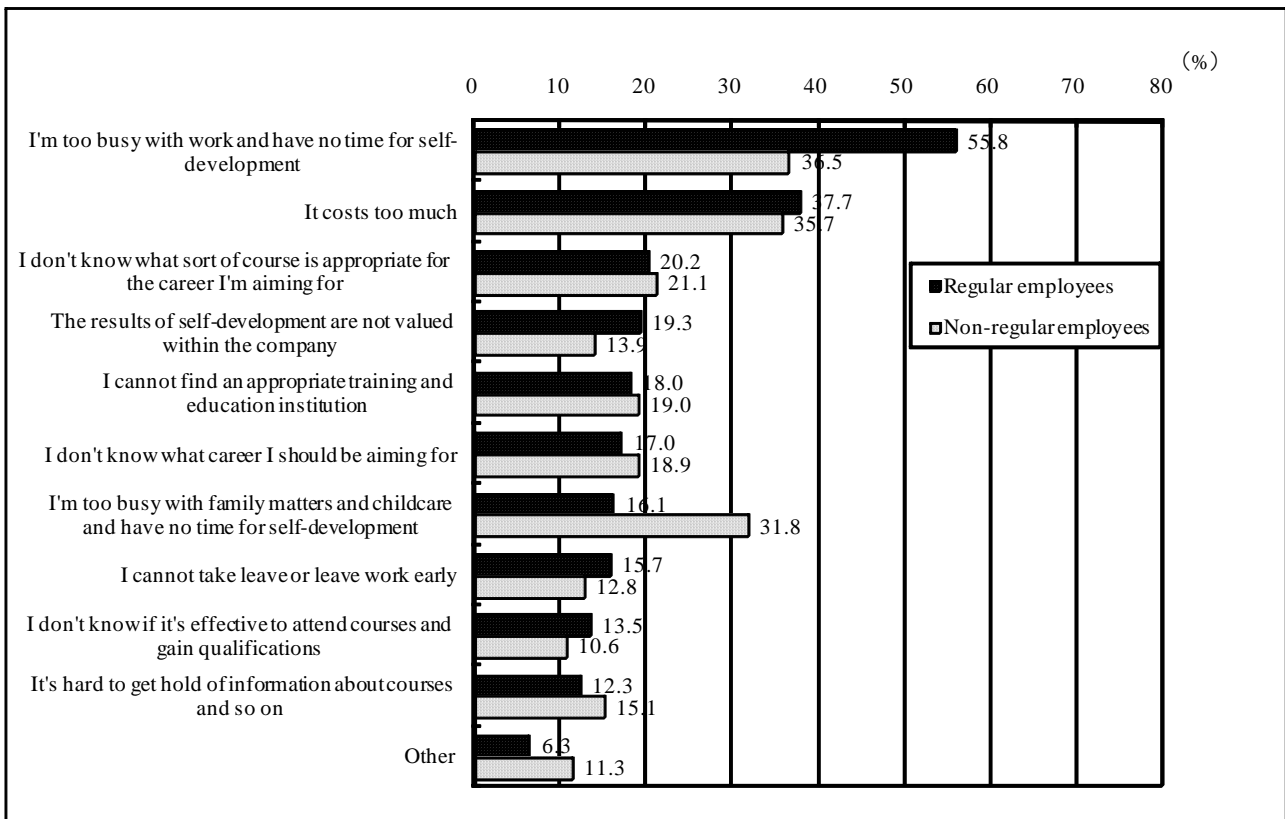


Figure 51 Issues of self-development among workers who responded that there are issues with self-development (multiple answers allowed)



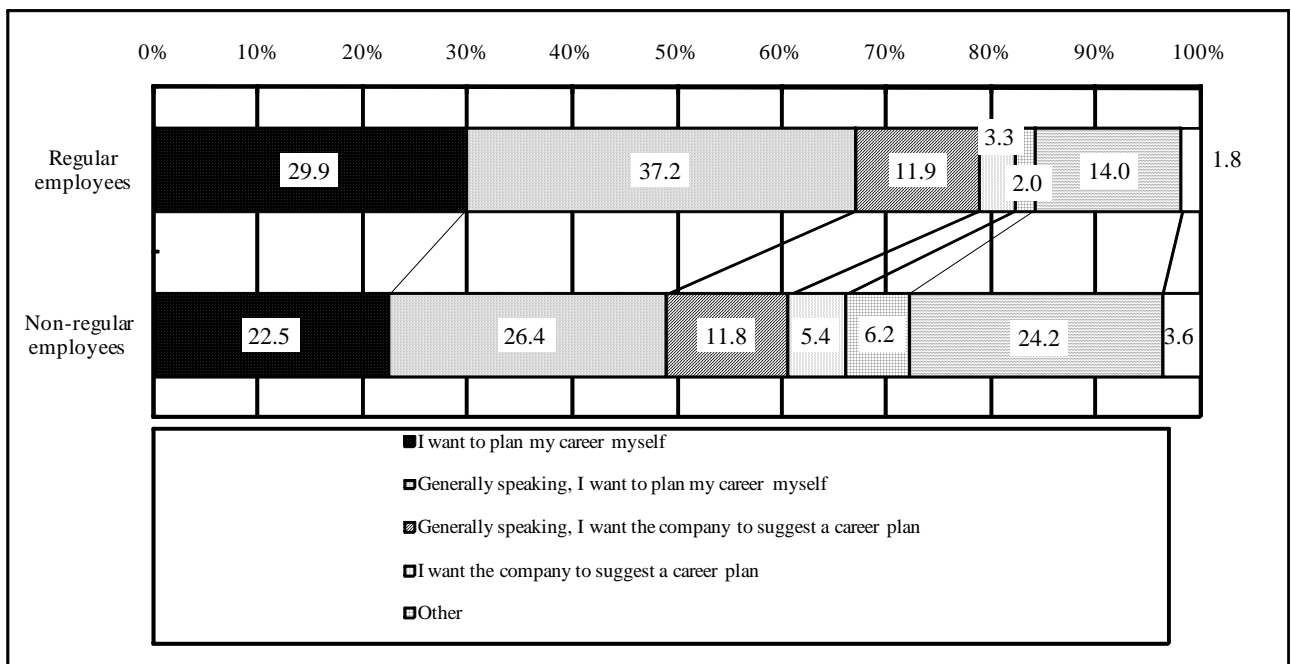
(3) Future career planning

1) Thoughts on career planning (Figure 52)

Concerning the wishes of workers with regard to their own career planning, 29.9% (previous survey: 33.1%) of regular employees responded “I want to plan my career myself”, while 37.2% (previous survey: 36.0%) responded “Generally speaking, I want to plan my career myself”. The combined result shows that close to 70% (67.1% [previous survey: 69.1%]) wish to plan their careers proactively.

On the other hand, 22.5% (previous survey: 28.9%) of non-regular employees responded “I want to plan my career myself”, while 26.4% (previous survey: 23.4%) responded “Generally speaking, I want to plan my career myself”, which represents a ratio of only about 50% (48.9% [previous survey: 52.3%]) wishing to plan their careers proactively. However, non-regular employees who wanted the company to suggest a career plan (the total for “Generally speaking, I want the company to suggest a career plan” and “I want the company to suggest a career plan”) amounted to the 10% range (17.2% [previous survey: 11.7%]). The proportion of non-regular employees who responded “I don’t know” was 24.2% (previous survey: 26.9%), higher than regular employees (14.0% [previous survey: 13.5%]).

Figure 52 Attitude towards career planning

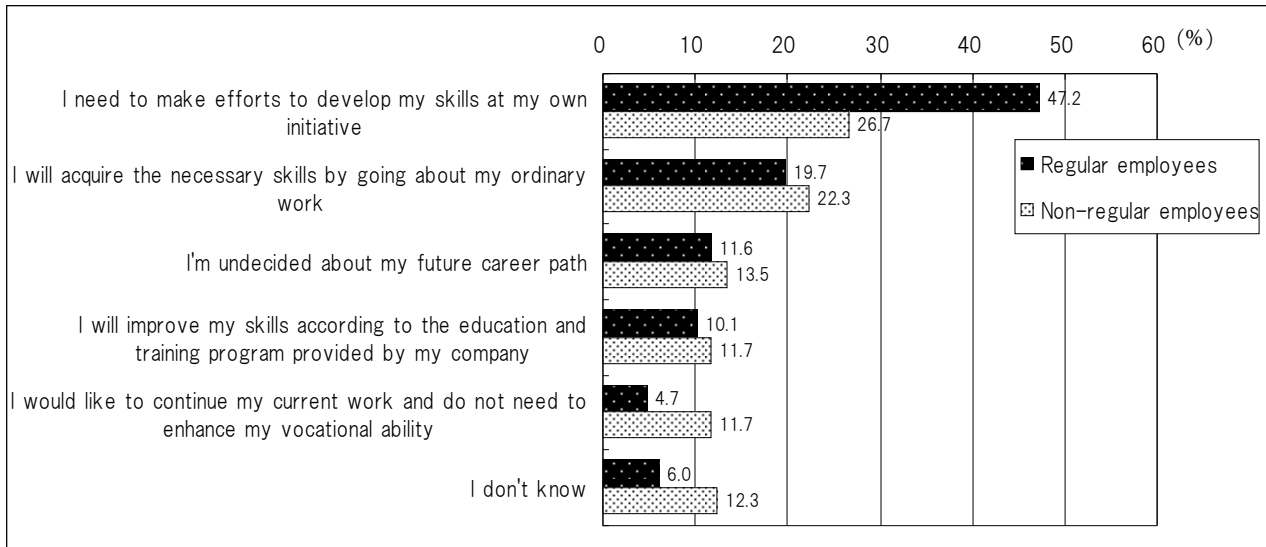


2) Method for developing vocational ability for workers to achieve working life that they hope (Figure 53)

Concerning the method for developing vocational ability for workers to achieve working life that they hope, the ratio of regular employees who responded “I need to make efforts to develop my skills at my own initiative” was the highest at 47.2%. On the other hand, for non-regular employees, the ratio responding “I need to make efforts to develop my skills at my own initiative” was also the highest at 26.7%, but it accounts for a small proportion of the total responses. For this reason, a higher ratio of non-regular employees identified other items

compared with regular employees, including “I will acquire the necessary skills by going about my ordinary training” (22.3%).

Figure 53 Method for developing vocational ability for workers to achieve working life that they hope



Definitions of Main Terms

1. Full-time employee

- 1) A worker who is employed with no fixed period or with a fixed period of more than one month.
- 2) A temporary or day worker who was employed for 18 days or more a month in the two months prior to the date of the survey.

2. Regular employee

A full-time employee without a fixed period of employment, who is neither a part-time worker nor a worker on loan from another company.

3. Non-regular employee

A full-time employee, who is not a regular employee as defined above. (A short-term contract worker, contract employee, part-time worker or worker who is employed under a similar title.)

4. Off the job training

Work orders requiring employees to attend education and training, which involves temporary departure from normal work. This includes for example, training within the company (with a number of workers gathered together in one place) or training outside the company (sending workers for education and training to an external organization such as an industry group or a private sector education and training institution).

5. On the job training

Education and training that is carried out in the course of daily work, in which superiors directly instruct their subordinates on work procedures.

6. Systematic on the job training

Education and training that is carried out in the course of daily work. A written plan for education and training is prepared, defining the persons responsible for training, the recipients of the training, the period, content and so on, and the training is carried out gradually and continuously. This includes for example, a line leader being responsible for education and training, and instructing his or her subordinates in work procedures based on the education and training plan.

7. Self-development

Activities carried out by a worker towards the continuance of his or her career, by autonomously developing and improving abilities related to work (not including hobbies, amusements, sport and fitness etc. unrelated to work).

8. Evaluation of vocational ability

Evaluation of skills and abilities required for work based on evaluation standards prepared by the particular company organization, industry group, or on various existing qualifications.

9. Leave for education and training

Leave that can be used by a worker for education and training.

10. Career consulting

Specialist consultation to enable a worker to plan his or her career in accordance with their aptitude and work experience, and to select a job function and undertake relevant personal

development effectively.

11. Career planning

Where a worker plans initiatives for developing and improving his or her work choices and vocational ability in accordance with their aptitude and work experience.