

**Release of Results of the Fiscal 2012 Basic Survey of Human Resources Development
– Trend expenses spent by companies for Human Resources Development is expected to
continue to be upward as it was Last year–**

The Ministry of Health, Labour and Welfare releases lately summarized results of the Fiscal 2012 Basic Survey of Human Resources Development.

The Basic Survey of Human Resources Development is aimed at showing the current state of the country's companies and business establishments, and human resources development of their workers, categorized by regular¹⁾ and non-regular employees.²⁾ This survey comprises three sub-surveys: 1) Company Survey, where company policies for human resources development are researched; 2) Business Establishment Survey, where state of education and training at business establishments is researched; and 3) Individual Survey, where state of education and training for individual workers is researched. Among companies and business establishments with 30 or more full-time employees, approximately 7,200 companies are selected for the Company Survey, and approximately 7,000 business establishments are extracted for the Business Establishment Survey. Approximately 23,000 workers who belong to extracted business establishments are selected for the Individual Survey.

The Basic Survey has been conducted every year since 2006. Survey period for the latest Company Survey and Business Establishment Survey was from October 23, 2012 to November 22, 2012, and that for the Individual Survey was from October 23, 2012 to December 10, 2012.

[Key Points of Survey Results]

- 1 Results and estimates of skills development by companies (Company Survey) (Appendix p.8)
 - Regarding the costs of OFF-JT per regular employee³⁾, a comparison of the results for the past 3 years with estimates for the following 3 years showed an “upward trend” for the following 3 years in a high proportion of companies (31.2%, increased 9.8 points compared to the figures in the past 3 years). Similar trends were also observed for non-regular employees.
- 2 Problems of human resources development (Business Establishment Survey) (Appendix p.14)
 - 68.7% of business establishments responded that they have “some problems” regarding human resources development
 - The most common response regarding problems was “lack of instructors” (51.3%), followed by “have no time to develop human resources” (44.5%), and “even if we develop human resources, they quit” (40.4%).
- 3 Status and problems of self-development (Individual Survey) (Appendix p.38, p.42, p.43)
 - The ratio of workers who undertook self-development was 47.7% for regular employees (previous survey: 43.8%) and 22.1% for non-regular employees (previous survey: 19.3%), which increased for the second consecutive year.
 - The proportions of workers who thought that they had issues with carrying out self-development were 79.4% for regular employees and 72.7% for non-regular employees.
 - The most common response of regular employees regarding issues with self-development was “I’m too busy with work and have no time for self-development” (56.5 %), followed by “It costs too much” (34.4%). The most common response among non-regular employees was also “I’m too busy with work and have no time for self-development” (34.8%), followed by “I’m too busy with family matters and childcare and have no time for self-development” (32.5%).

For details, see Appendix “Reference (1. Outline of Survey Result, 2. Explanation of Terms)”

Notes:

- 1) Employees without a fixed period of employment, excluding part-time workers, etc.
- 2) Short-term contract workers, contract employees, part-time workers, or workers who are employed under similar titles; Dispatched workers and contract workers not included.
- 3) Education and training that are carried out pursuant to work orders, involving temporary departure from normal work.

Overview of Survey Results

1 Company Survey

(1) Expenditure for OFF-JT and support for self-development (Figures 1 and 2)

The average expenditure per worker for education and training (the average amount spent by expending companies; hereafter the same applies) slightly decreased both for OFF-JT to 14,000 yen (fiscal 2011 survey [hereafter “previous survey”]: 15,000 yen) and for support for self-development to 4,000 yen (previous survey: 6,000 yen).

Figure 1 Average expenditure per worker for OFF-JT

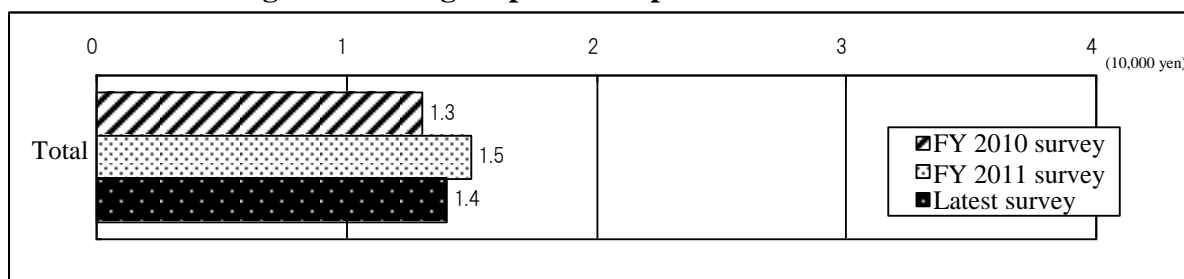
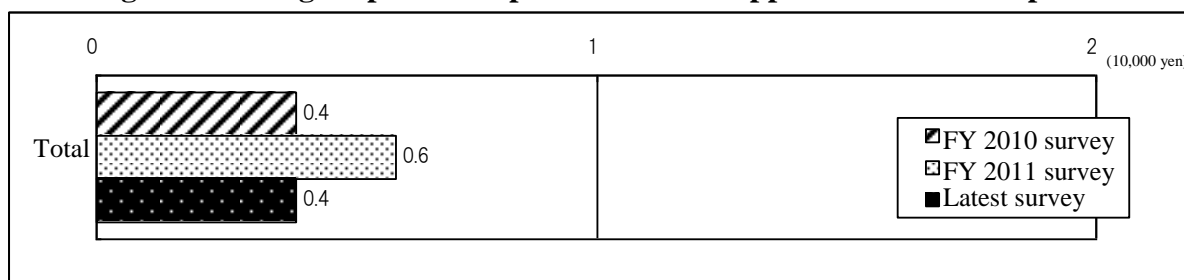


Figure 2 Average expenditure per worker for support for self-development



(2) Policies for skills development of workers

1) “Determination by companies” or “determination by individual workers”? (Figures 3 and 4)

Among targeted companies, 75.3% thought that they should determine or mainly determine policies for skills development for regular employees (previous survey: 73.8%). The ratio is still at a high level, showing a slight increase from the previous year. Companies who responded that individual workers should determine or mainly determine policies for skills development made up 23.7% (previous survey: 25.2%).

On the other hand, 63.3% of responding companies thought that they should determine or mainly determine policies for skills development for non-regular employees, slightly up from 61.3% in the previous survey. Companies who responded that individual workers should determine or mainly determine policies for skills development made up 33.1% (previous survey: 35.6%). For non-regular employees, fewer companies thought that they should determine or mainly determine relevant policies than for regular employees.

In the future, more companies than the present level would determine or mainly determine policies for skills development for both regular employees (77.1%) and non-regular employees (64.8%).

Figure 3 Entities that determine policies for skills development of regular employees

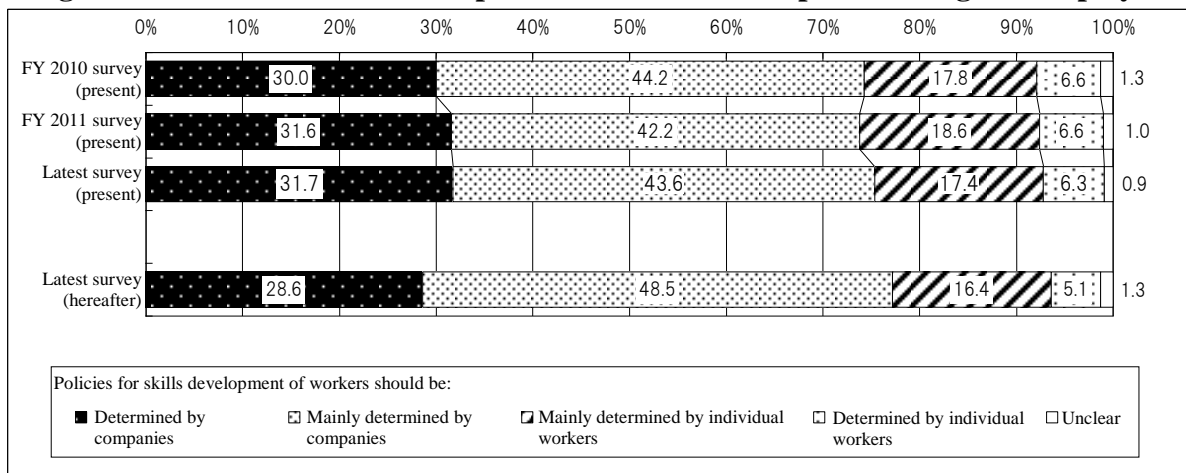
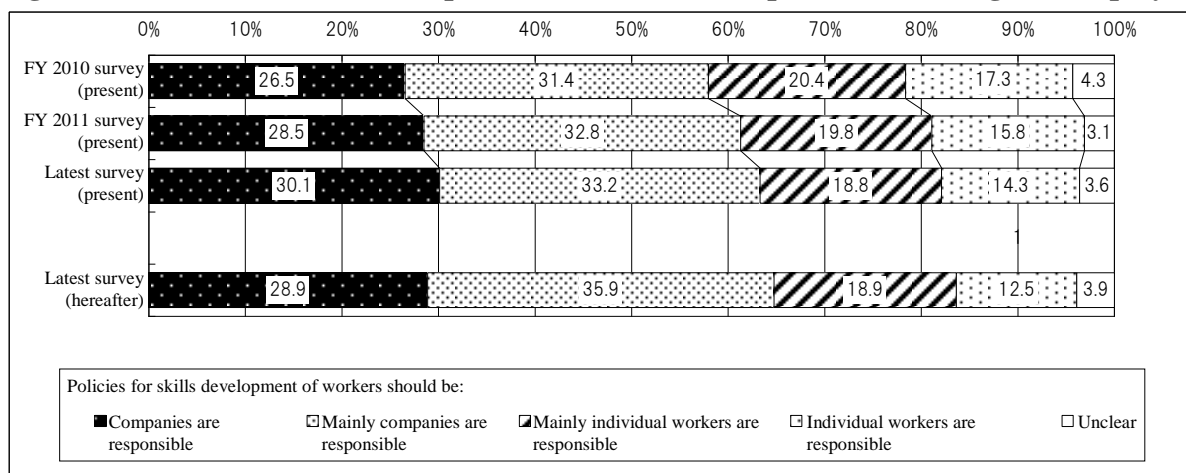


Figure 4 Entities that determine policies for skills development of non-regular employees



2) “Emphasis on selected workers” or “emphasis on workers in general”? (Figures 5 and 6)

Regarding the emphasized targets of education and training for regular employees, 57.0% (previous survey: 55.3%) of companies emphasized or mainly emphasized “education and training to raise the level of ability of workers in general”. The proportion of companies that emphasized or mainly emphasized “education and training to raise the level of ability of selected workers” was 41.8% (previous survey: 43.3%).

On the other hand, for non-regular employees, 51.9% (previous survey: 50.1%) of companies emphasized or mainly emphasized “education and training for workers in general”, and 44.3% (previous survey: 46.1%) of companies emphasized or mainly emphasized “education and training for selected workers”.

The latest results regarding regular and non-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, exceeding the proportion of “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 current state. These proportions were 63.3% for regular employees and 54.9% for non-regular employees, both remained roughly unchanged from the previous survey.

Figure 5 Emphasized targets of education and training for regular employees

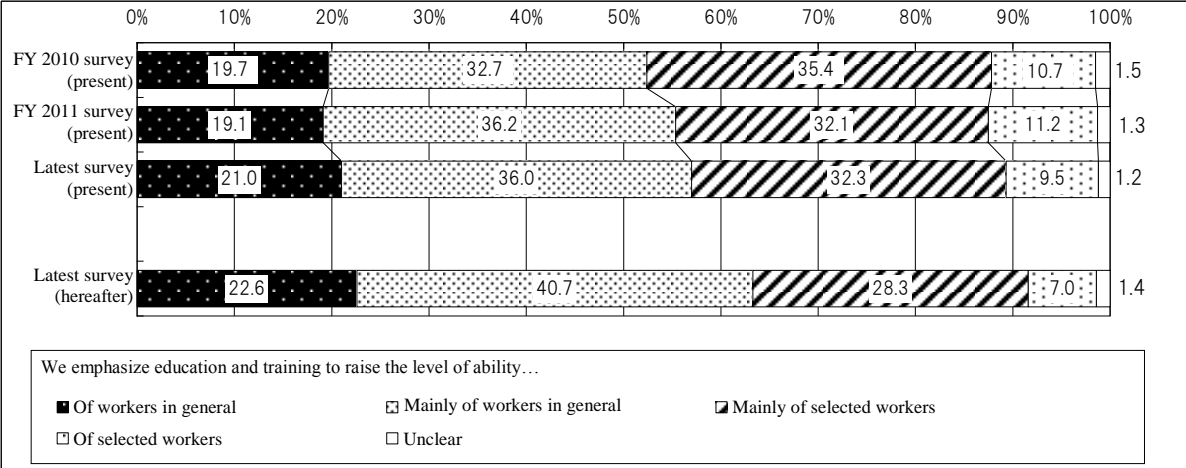
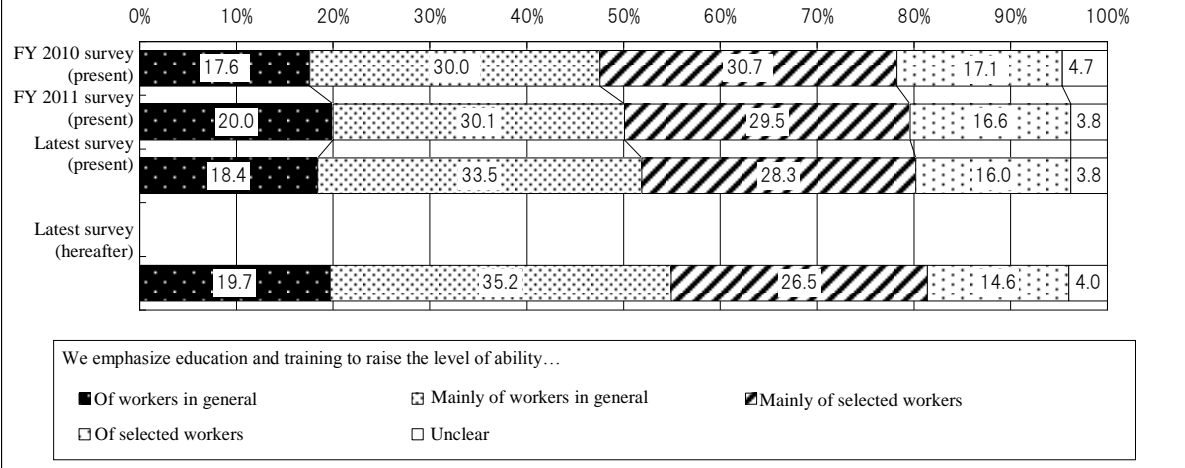


Figure 6 Emphasized targets of education and training for non-regular employees



3) “OJT” or “OFF-JT”? (Figures 7 and 8)

Regarding emphasized methods for education and training for regular employees, 74.9% (previous survey: 74.9%) of companies emphasized or mainly emphasized “OJT”, and 23.3% (previous survey: 23.1%) emphasized or mainly emphasized “OFF-JT”.

On the other hand, for non-regular employees, 76.4% (previous survey: 75.9%) of companies emphasized or mainly emphasized “OJT”.

In comparison to the previous survey, the proportion has remained roughly steady in companies that emphasize or mainly emphasize “OJT” for both regular and 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-JT” will slightly increase from the current state. These proportions were 27.1% for regular employees and 21.8% for non-regular employees, and roughly remained unchanged from the previous survey.

Figure 7 Emphasized method for education and training for regular employees

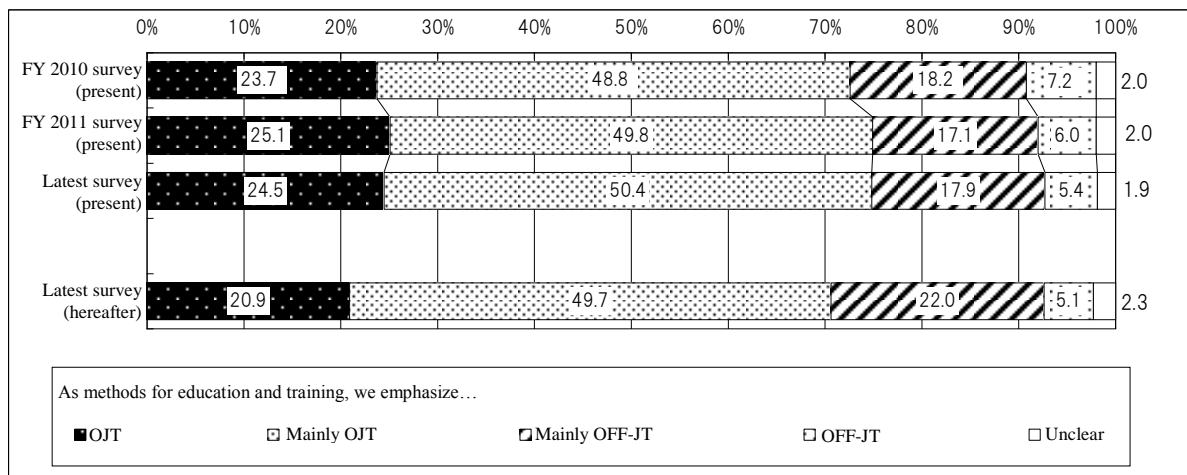
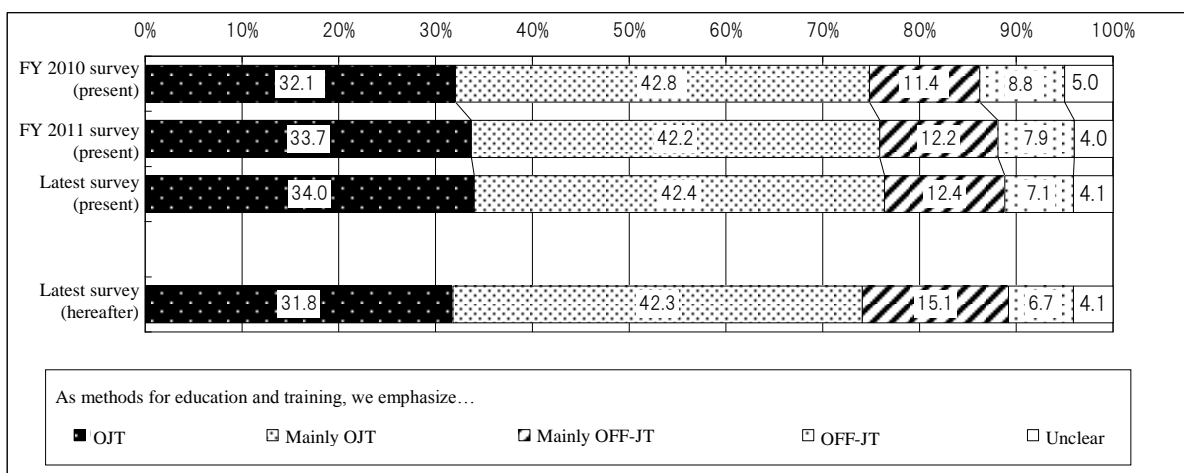


Figure 8 Emphasized method for education and training for non-regular employees



4) “Outsourced” or “in-house” education and training? (Figures 9 and 10)

Regarding methods for education and training of regular employees, 38.3% (previous survey: 38.0%) of companies emphasized or mainly emphasized “outsourcing”, and 59.8% (previous survey: 60.5%) emphasized or mainly emphasized “in-house”.

On the other hand, for non-regular employees, 22.2% (previous survey: 23.5%) of companies emphasized or mainly emphasized “outsourcing”, and 73.7% (previous survey: 72.6%) of companies emphasized or mainly emphasized “in-house”. Compared to regular employees, the proportion of companies that emphasized or mainly emphasized “outsourcing” was low.

In comparison to the previous survey, companies that emphasized or mainly emphasized “outsourcing” for regular employees have remained roughly unchanged, while the proportion of those companies slightly decreased for non-regular employees.

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

Figure 9 Policy of method for education and training for regular employees

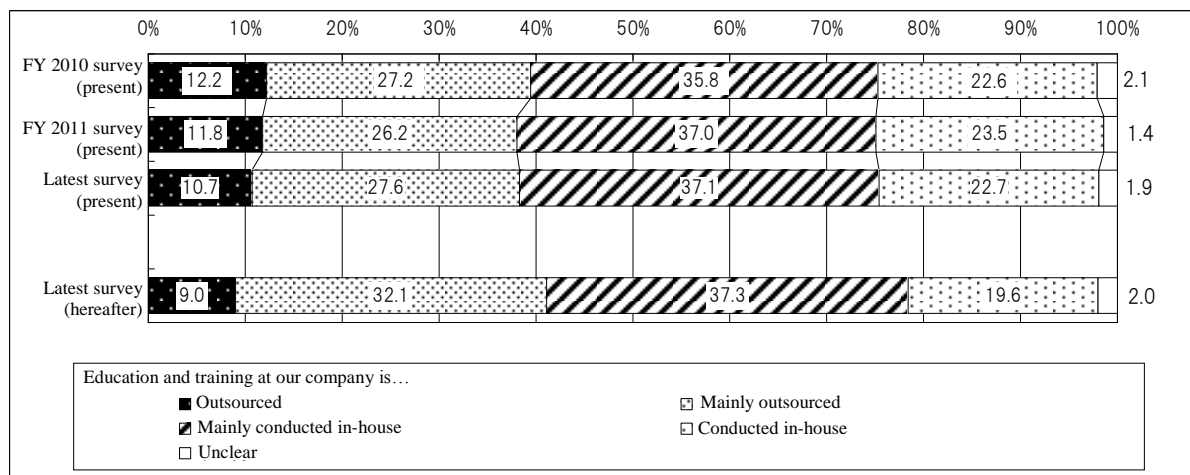
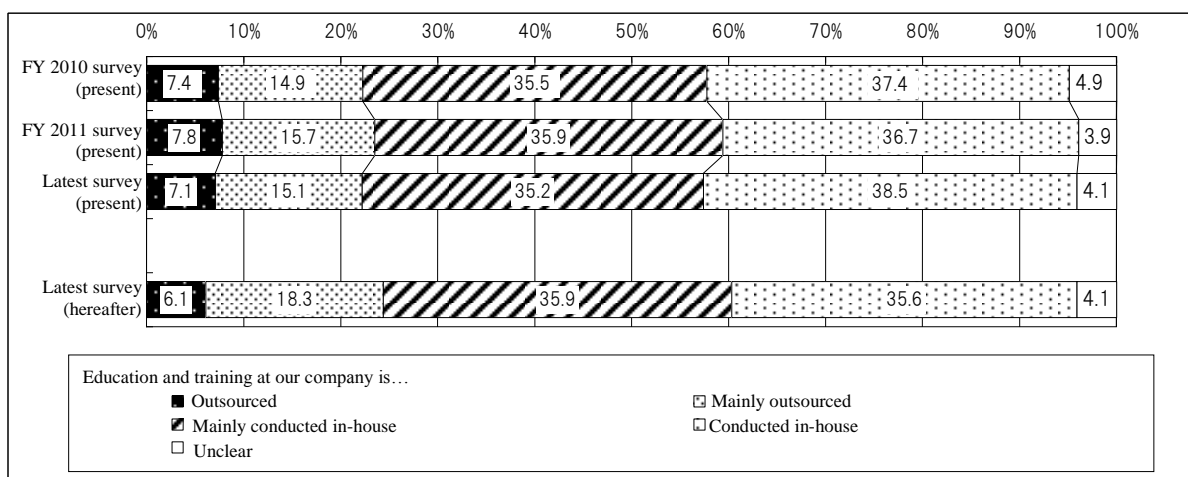


Figure 10 Policy of method for education and training for non-regular employees



(3) Track record and prospect of human resources development (Figures 11 and 12)

Regarding costs for OFF-JT of regular employees during the past three years (fiscal 2009-fiscal 2011), 38.3% of companies responded “no change”, and 21.4% of companies responded “increasing trend”. The proportion of companies that responded “increasing trend” slightly increased from that of the previous survey (19.3%). Regarding costs for support for self-development, 31.6% of companies responded “no change”, and 12.2% of companies responded “increasing trend”.

Survey results regarding prospects for the next three years for both costs for OFF-JT and costs for support for self-development suggest that the proportion of companies that respond “increasing trend” will increase from the state of the past three years to 31.2% for costs for OFF-JT and 24.8% for costs for support for self-development.

As for Off-JT, 23.9% of companies responded “no track record” regarding estimates for the next 3 years. However, the percentage slightly decreased from the previous year (27.0%).

On the other hand, regarding costs for OFF-JT of non-regular employees during the past three years, 55.0% of companies responded “no track record”, and 7.2% of companies responded “increasing trend”. Regarding costs for support for self-development, 62.5% of companies responded “no track record”, and 5.0% of companies responded “increasing trend”.

Survey results regarding prospects for the next three years for both costs for OFF-JT and costs for support for self-development suggest that the proportion of companies that respond “increasing trend” will increase from the state of the past three years to 15.4% for costs for OFF-JT and 13.6% for costs for support for self-development, representing a lower level than for regular employees.

Figure 11 Costs for OFF-JT and for support for self-development over the past three years and for the next three years (regular employees)

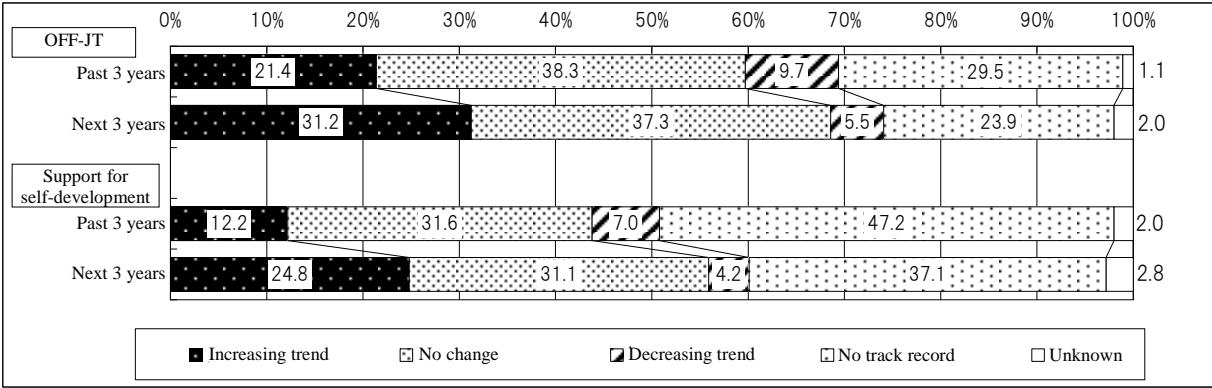
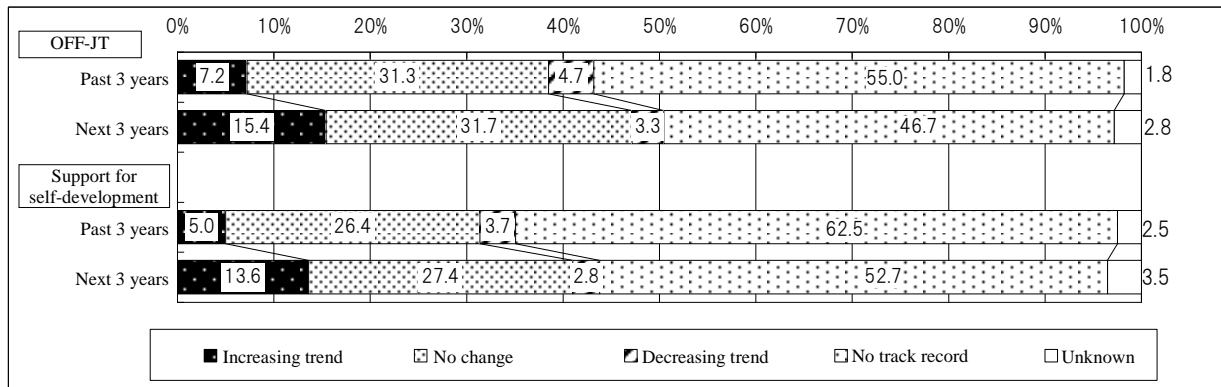


Figure 12 Costs for OFF-JT and for support for self-development over the past three years and for the next three years (non-regular employees)



(4) Internal occupational skills development plan and promoters of occupational skills development (Figures 13, 14, 15 and 16)

Regarding the status of creating internal an occupational skills development plan, 73.8% of companies responded “not created in any branches,” while 16.0% of companies responded “created in all branches” and 9.6% of companies responded “created in some branches.”

Regarding the appointment status of promoters of occupational skills development, 74.9% of companies responded “not appointed in all branches,” 13.8% of companies responded “appointed in all branches” and 10.7% of companies responded “appointed in some branches.”

Regarding the method of creating an internal occupational skills development plan in companies that use it, 65.5% of companies said “the headquarters creates an internal occupational skills development plan and applies this to all branches.”

Regarding the appointment method used by companies to appoint promoters of occupational skills development, 66.3% of companies responded “a promoter of occupational skills development is appointed by the headquarters and takes responsibility for all branches.”

Figure 13 Creation status of internal occupational skills development plan

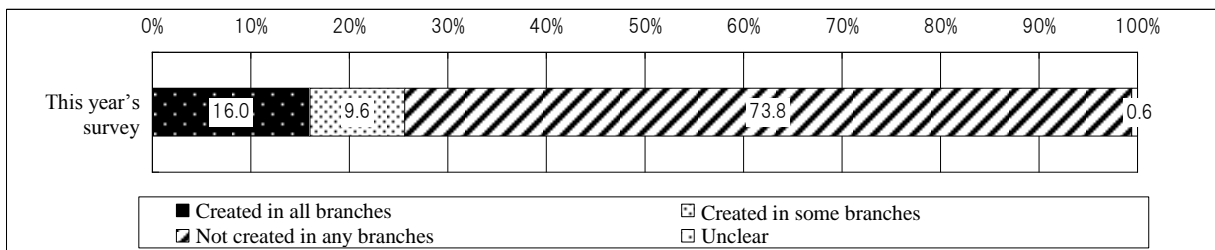


Figure 14 Method of creating internal occupational skills development plan

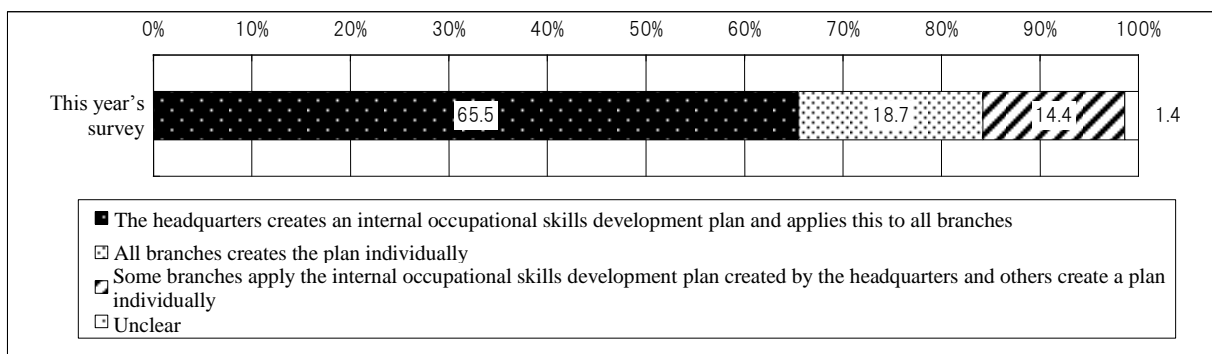


Figure 15 Appointment status of occupational skills development promoters

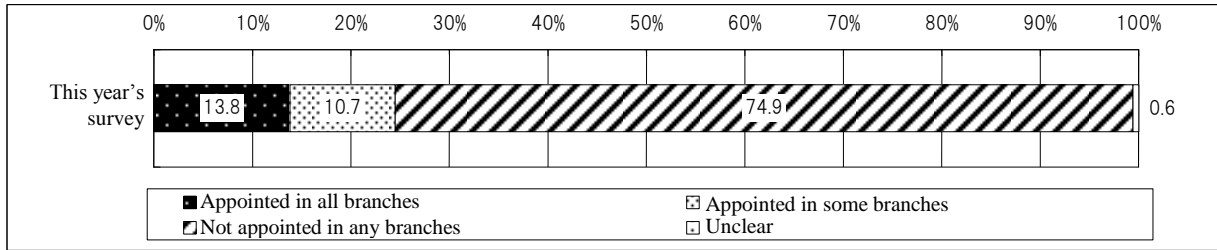
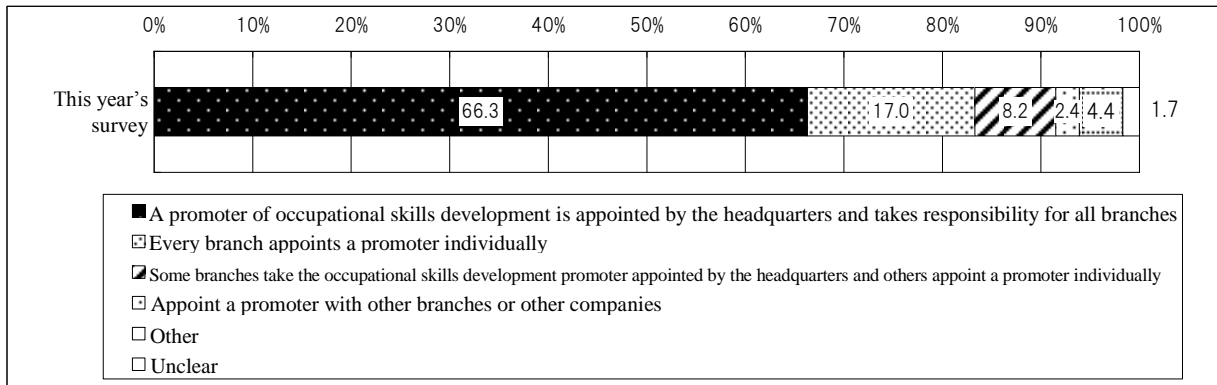


Figure 16 Method of appointing occupational skills development promoters



2. Business Establishment Survey

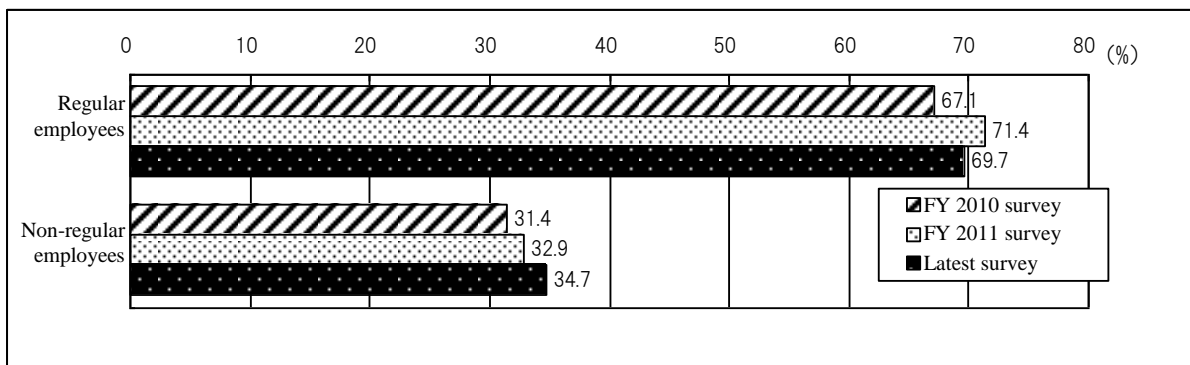
(1) State of implementation of education and training

1) State of implementation of OFF-JT (Figures 17 and 18)

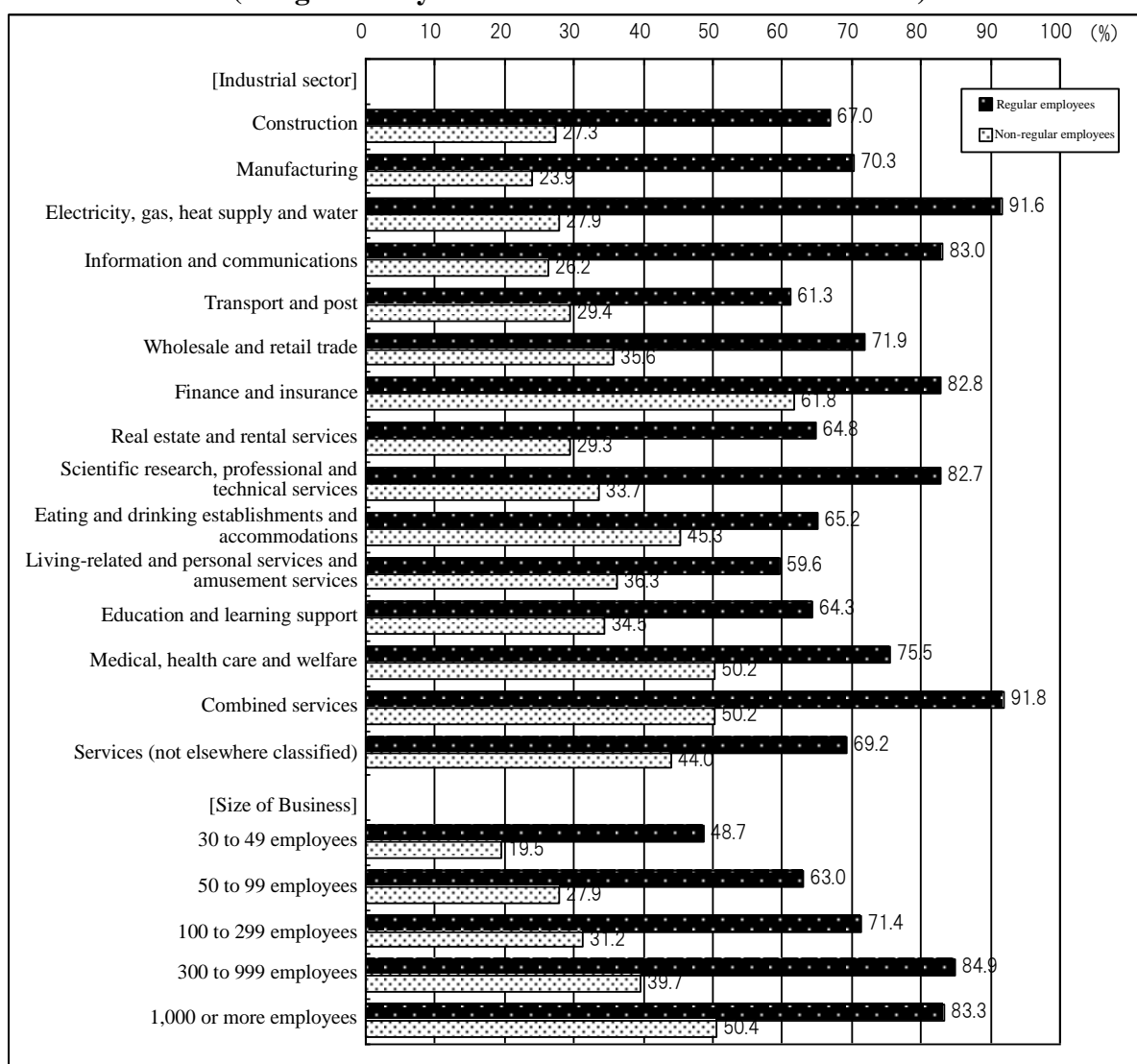
For regular employees, 69.7% (previous survey: 71.4%) of businesses implemented OFF-JT in fiscal 2011. Regarding the breakdown by industry, the proportions were as follows: high in Combined services (91.8%), Electricity, gas, heat supply and water (91.6%), Information and communication (83.0%), and so on, while low in Living-related and personal services and amusement services (59.6%), Transport and post (61.3%), Education and learning support (64.3%), and so on. Categorized by size of the business, more OFF-JT was provided at larger businesses. In particular, the figure was high at businesses that have 100 or more employees, in the 70% range at businesses with 100 to 299 employees, and in the 80% range at businesses with 300 or more employees.

On the other hand, for non-regular employees, 34.7% (previous survey: 32.9%) of businesses implemented OFF-JT, representing a lower level than for regular employees. By industry, the proportions were as follows: high in Finance and insurance (61.8%), Medical, health care and welfare (50.2%), Combined services (50.2%), while low in Manufacturing (23.9%), Information and communication (26.2%), Construction (27.3%) and so on. Categorized by size of the business, there is a tendency towards a higher proportion of larger businesses implementing OFF-JT.

Figure 17 Businesses that implemented OFF-JT (total)



**Figure 18 Businesses that implemented OFF-JT
(categorized by industrial sector and size of business)**



2) State of implementation of systematic OJT (Figures 19 and 20)

For regular employees, 59.1% (previous survey: 63.0%) of businesses implemented systematic OJT in fiscal 2011, which showed a slight decrease from the previous survey.

Regarding the breakdown by industry, the proportions were as follows: high in Electricity, gas, heat supply and water (86.9%), Combined services (85.0%), Finance and insurance (79.1%) and so on, whereas low in Living-related and personal services and amusement services (43.9%). Categorized by size of the business, more systematic OJT was provided at larger businesses. In particular, the figure was high at businesses that have 300 or more employees, in the 70% range at businesses with 300 to 999 employees, and in the 76% range at businesses with 1,000 or more employees.

On the other hand, for non-regular employees, 28.0% (previous survey: 30.8%) of businesses implemented systematic OJT, slightly decreased from the previous year, and represents a lower level than for regular employees. Regarding the breakdown by industry, the proportions were as follows: high in Eating and drinking establishments and accommodations (41.1%), Combined services (38.4%) and so on, whereas low in Information and communications (9.6%), Construction (14.6%), etc. Categorized by size of

the business, there is a tendency towards a higher proportion of larger businesses implementing systematic OJT.

Figure 19 Businesses that implemented systematic OJT (total)

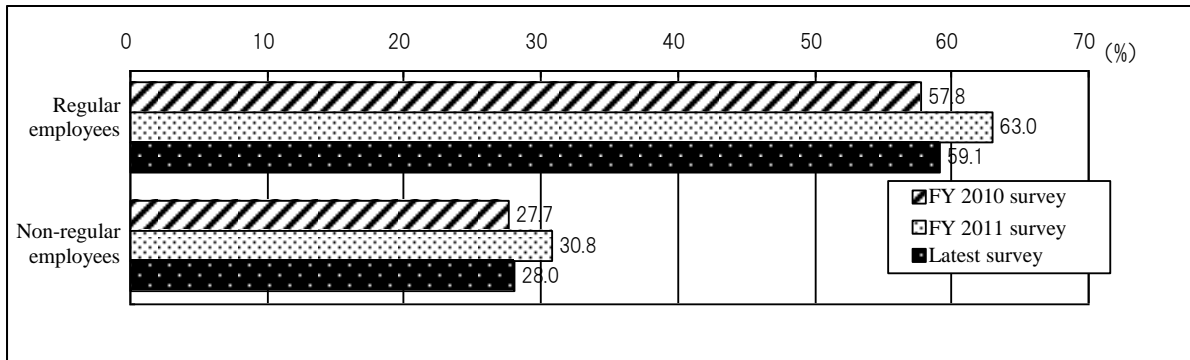
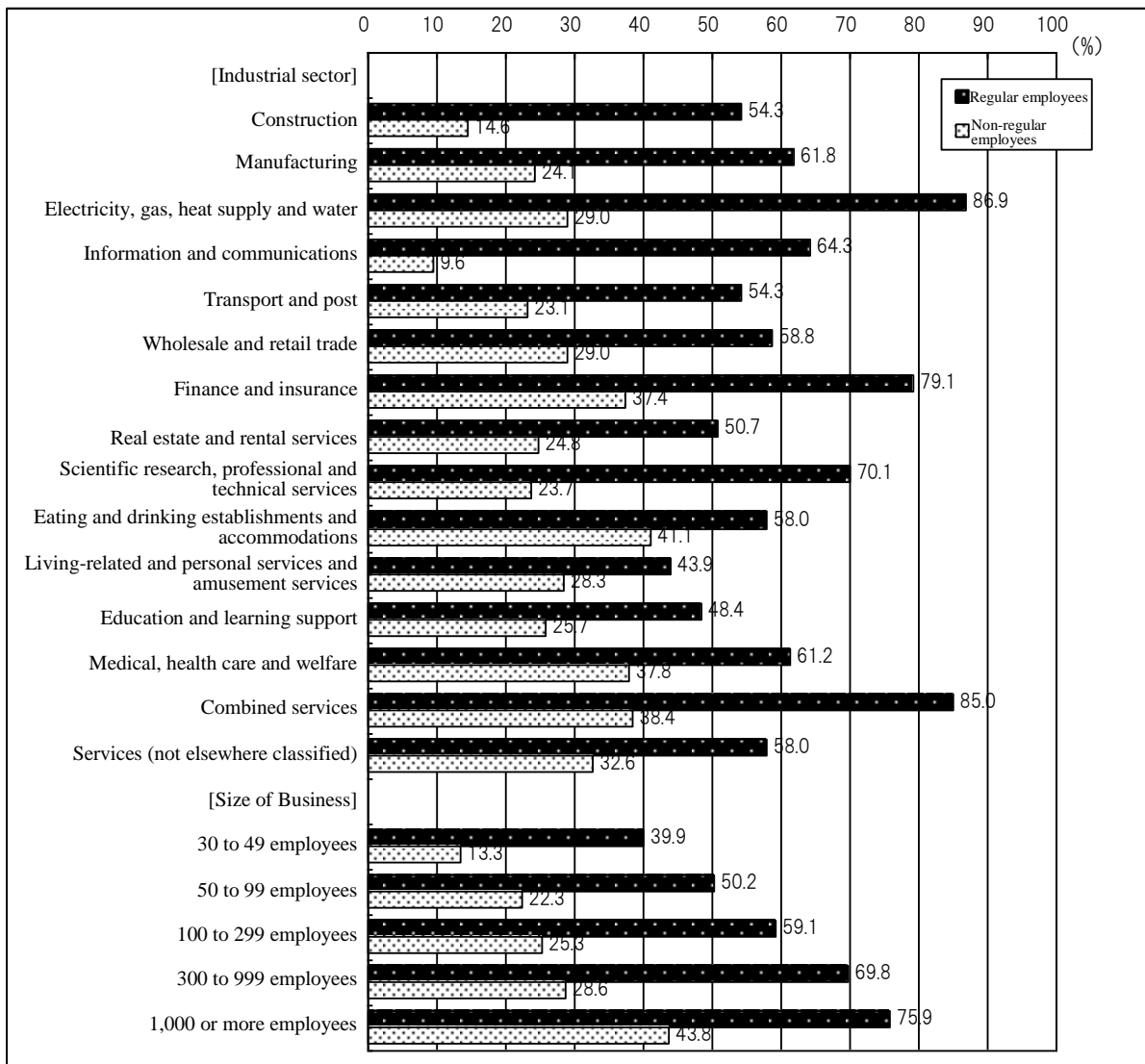


Figure 20 Businesses that implemented systematic OJT (categorized by industrial sector and size of business)



(2) Human resources development

1) Issues concerning human resources development (Figures 21 and 22)

Among responding businesses, 68.7% (previous survey: 67.8%) responded that they had problems with skills development and/or human resources development. Nature of issues were as follows (multiple answers allowed): “There are insufficient personnel to provide guidance” (51.3% [previous survey: 51.7%]) was the highest, followed by “There is no time for carrying out human resources development” (44.5% [previous survey: 44.7%]), “Even if we train personnel, they quit” (40.4% [previous survey: 37.1%]), “We cannot acquire human resources who are worth training” (28.6% [previous survey: 29.5%]), and “We cannot afford to carry out personnel development” (22.7% [previous survey: 22.6%]).

Figure 21 Businesses that reported problems with human resources development

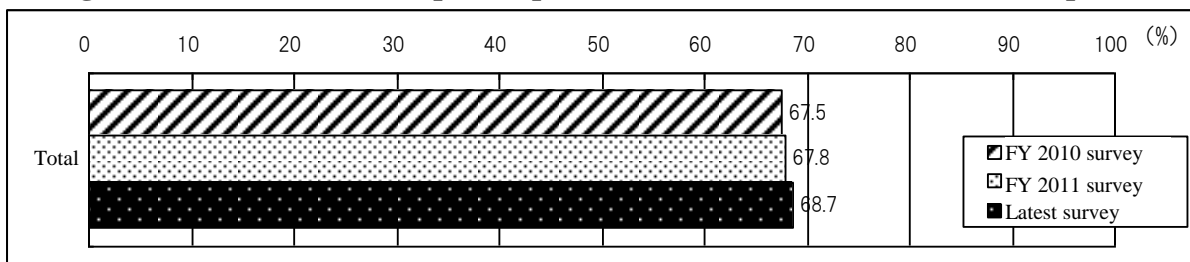
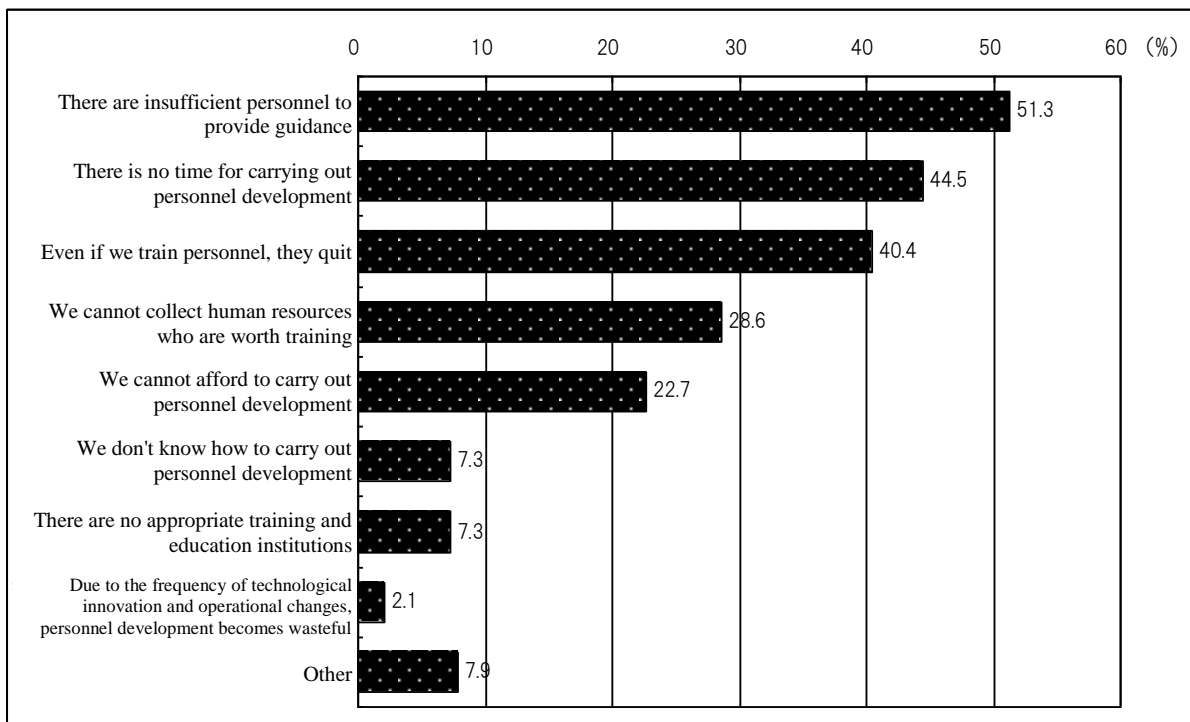


Figure 22 Breakdown of problems with human resources development (multiple answers allowed)



2) Awareness of abilities required of workers (Figures 23 and 24)

Among responding businesses, 86.2% (previous survey: 87.2%) reported that they have informed regular employees what abilities are required of them, with 43.6% (previous survey: 47.3%) responding “We inform our workers”, and 42.6% (previous survey: 39.9%) responding “We inform our workers to a certain extent”.

For non-regular employees, 71.8% (previous survey: 76.1%) of businesses reported that they have informed them thereof, with 29.8% (previous survey: 33.6%) responding “We inform our workers”, and 42.0% (previous survey: 42.5%) responding “We inform our workers to a certain extent”.

The proportions of businesses that informed their workers what abilities are required of them remained at the same level for regular employees and decreased from the previous survey for non-regular employees.

Figure 23 Awareness of abilities required of workers (regular employees)

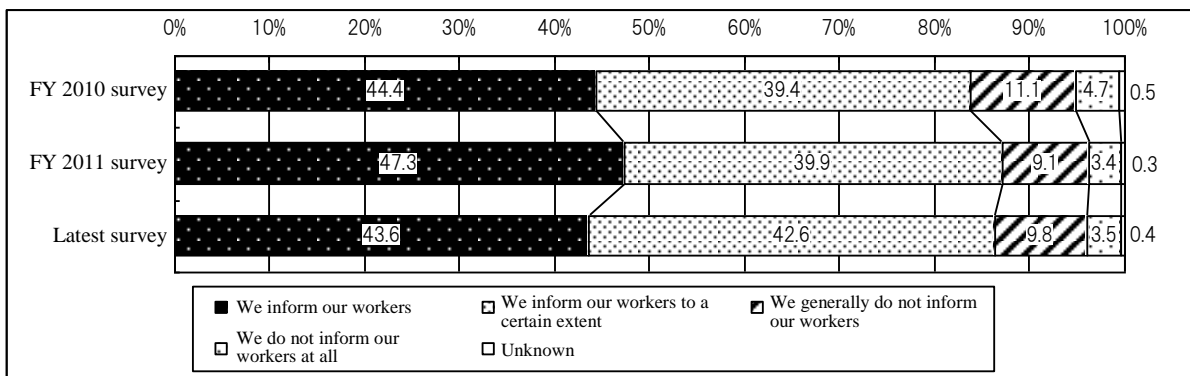
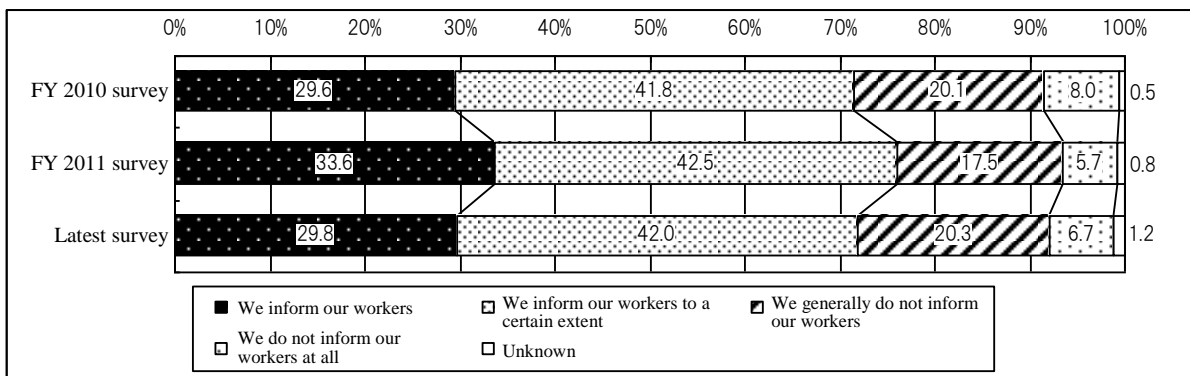


Figure 24 Awareness of abilities required of workers (non-regular employees)

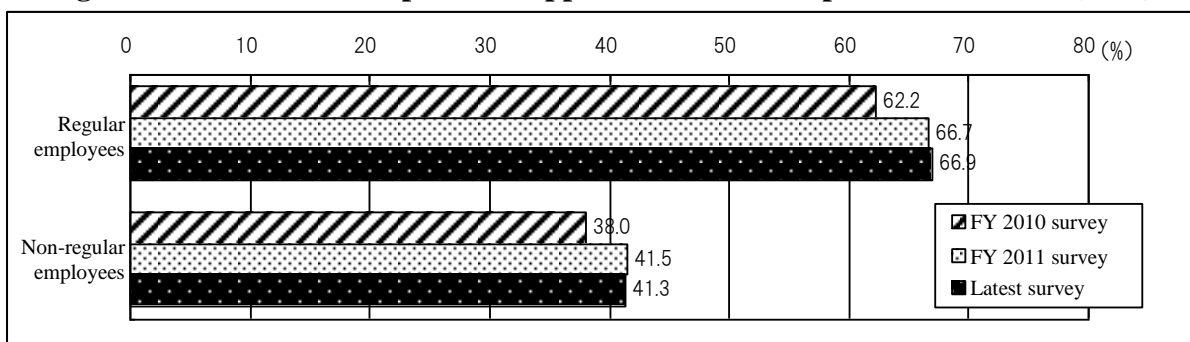


(3) Support for career planning

1) Support for self-development (Figures 25, 26 and 27)

Among responding businesses, 66.9% (previous survey: 66.7%) responded “We provide support” for self-development of regular employees. Regarding the breakdown by industry, the proportions were as follows: high in Combined services (97.8%), Finance and insurance (95.2%), Electricity, gas, heat supply and water (94.1%) and so on, whereas low in Living-related and personal services and amusement services (51.4%), Transport and post (52.9%), Eating and drinking establishments and accommodations (55.0%) and so on. 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. In particular, the figure was high at businesses that have 300 or more employees, in the 70% range at businesses with 300 to 999 employees and at businesses with 1,000 or more employees.

Figure 25 Businesses that provide support for self-development of workers (total)



Regarding the breakdown of nature of support (multiple answers allowed), the ratio of “Financial assistance with course fees etc.” was the highest at 83.6% (previous survey: 80.7%), followed by “Provision of information concerning training and education institutions, correspondence learning etc.” at 49.5% (previous survey: 43.9%), and “Support for autonomous study groups within the company” at 42.0% (previous survey: 42.0%).

On the other hand, 41.3% (previous survey: 41.5%) of businesses responded “We provide support” for self-development of non-regular employees. Regarding the breakdown by industry, the proportions were as follows: high in Combined services (83.2%), Finance and insurance (76.0%), and Medical, health care and welfare (75.1%), whereas low in Transport and post (32.1%), Eating and drinking establishments and accommodations (32.7%), Living-related and personal services and amusement services (33.3%). 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.

Regarding the breakdown of nature of support for the self-development of non-regular employees (multiple answers allowed), the ratio of “Financial assistance with course fees etc.” was the highest at 69.7% (previous survey: 67.2%), followed by “Provision of information concerning training and education institutions, correspondence learning etc.” at 48.0% (previous survey: 42.2%), and “Support for autonomous study groups within the company” at 42.3% (previous survey: 43.4%).

**Figure 26 Businesses that provide support for self-development of workers
(categorized by industrial sector and size of business)**

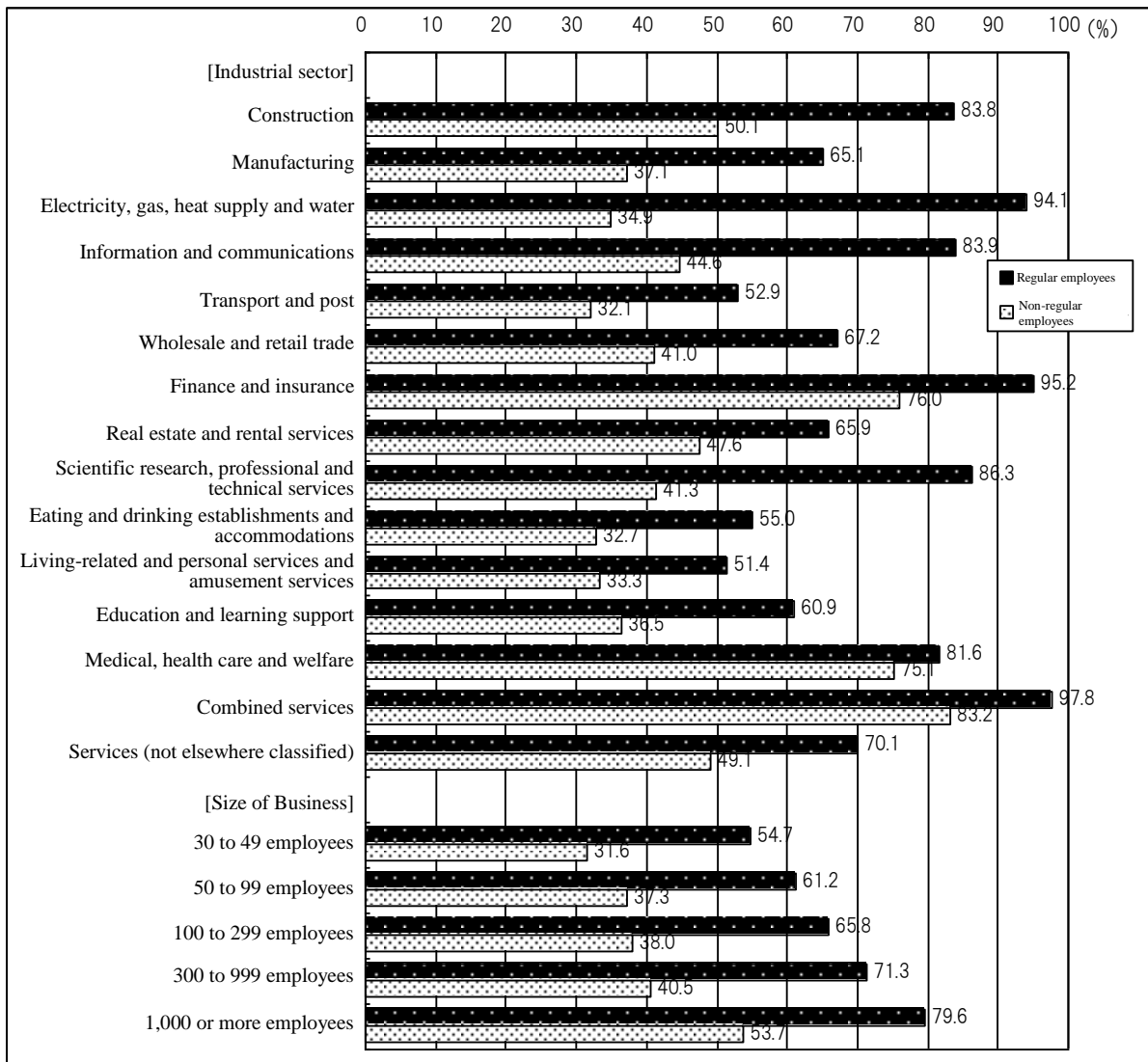
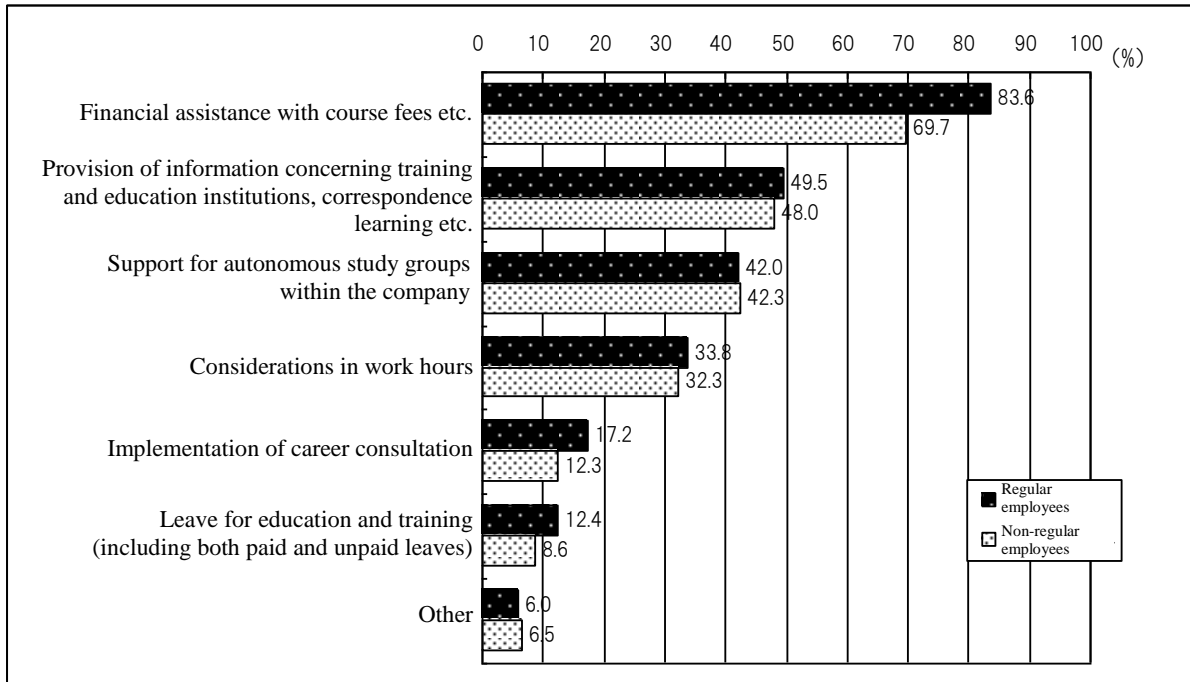


Figure 27 Nature of support for self-development of workers (multiple answers allowed)



2) State of implementation of leave systems for education and training (Figures 28 and 29)

Only 6.7% (previous survey 6.3%) of businesses implement a leave system for education and training. By industry, the figure was high in Combined services (47.1%), followed by Electricity, gas, heat supply and water (22.9%). Differences between categories by business size were small, though the rate of implementation was the highest among businesses with 1,000 or more employees.

Figure 28 Businesses that implement a leave system for education and training (total)

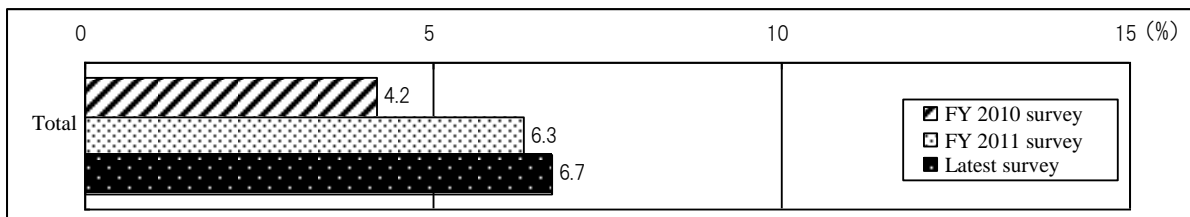
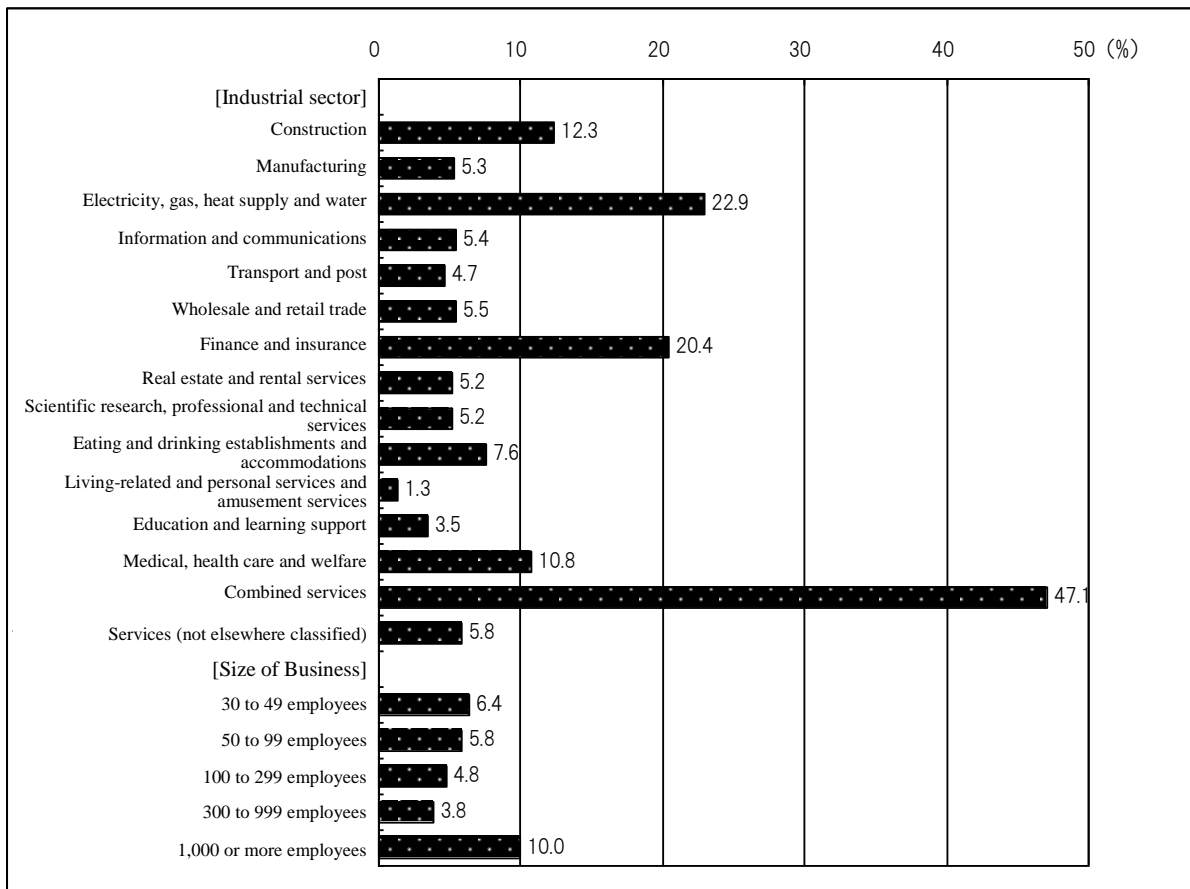


Figure 29 Businesses that implement a leave system for education and training (categorized by industrial sector and size of business)



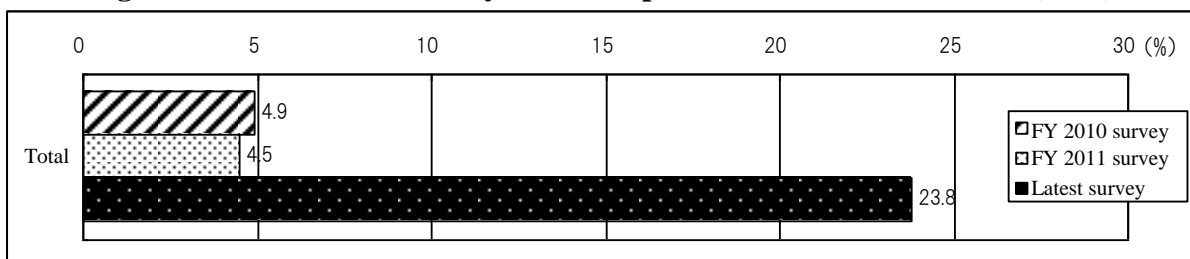
3) State of applying a system to implement career consultation (Figures 30, 31 and 32)

23.8% (previous survey: 4.5%) of businesses implemented a career consultation system*, which increased significantly compared to the previous year. By industry, the proportion was high in Combined services (69.2%) and in Finance and insurance (67.1%). Categorized by size of the business, the proportion for businesses with 1,000 or more employees was the highest at 41.0%.

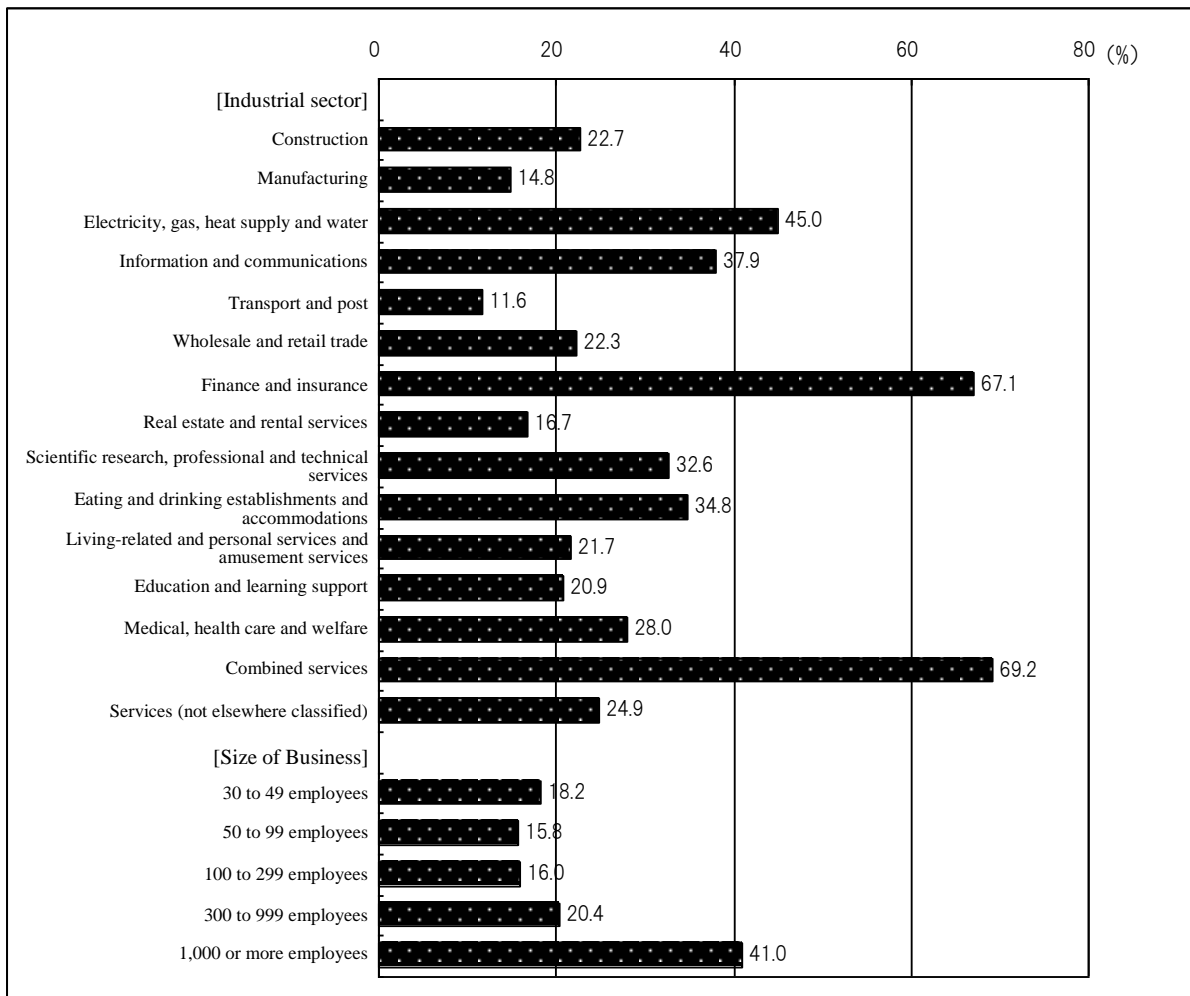
With regards to the specific reasons offered by businesses that did not implement a career consultation (multiple answers allowed), the proportion of businesses that responded “There was no demand by employees” was the highest at 49.1%.

(*) For interannual comparison, note that part of the question was revised in the 2012 survey and it was made clear that the “systems” include those implemented as customs, even though they were not definitely institutionalized.

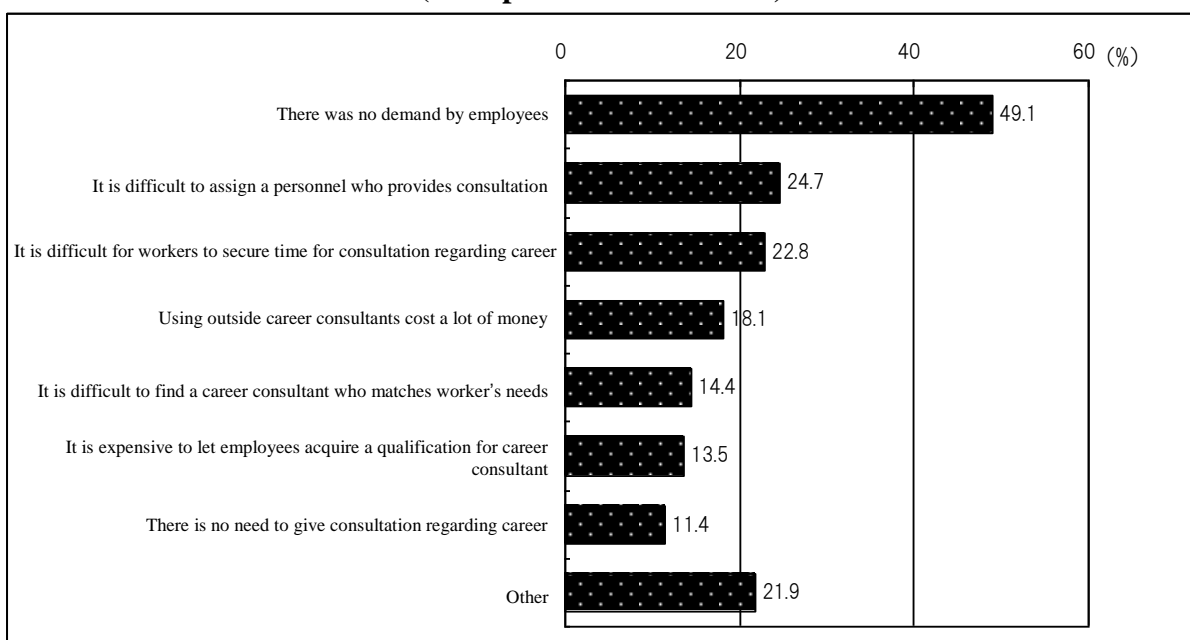
Figure 30 Businesses with a system to implement career consultation (total)



**Figure 31 Businesses with a system to implement a career consultation
(categorized by industrial sector and size of business)**



**Figure 32 Reasons for not implementing a career consultation
(multiple answers allowed)**



4) State of provision of avenues for considering career planning (Figures 33 and 34)

Among responding businesses, 43.2% (previous survey: 43.7%) 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 the highest at 90.4% (previous survey: 88.2%), followed by “Self-assessment system” at 50.7% (previous survey: 49.5%).

On the other hand, 24.2% (previous survey: 26.7%) of businesses provided avenues for considering career planning for non-regular employees, which slightly decreased from the previous survey. 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 the highest at 86.8% (previous survey: 89.4%).

Figure 33 Businesses that provide avenues for considering career planning (total)

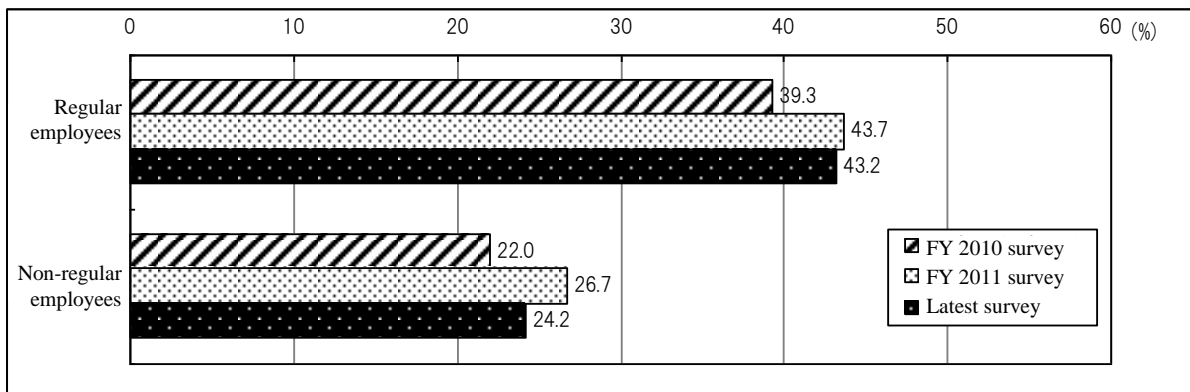
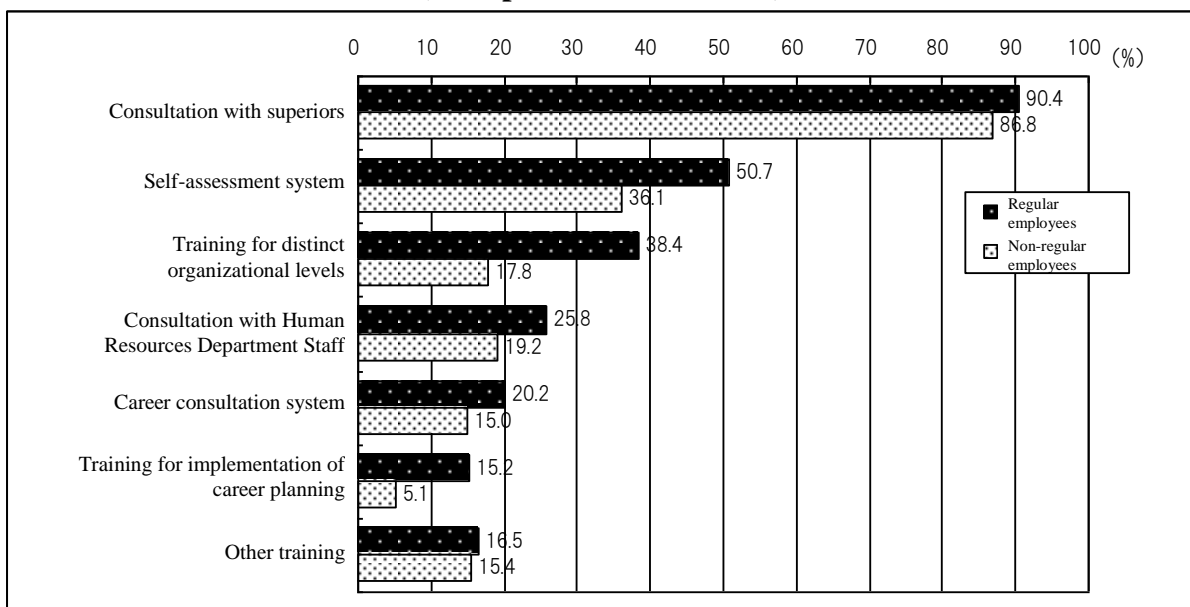


Figure 34 Means of providing avenues for considering career planning (multiple answers allowed)



(4) Vocational ability evaluations

1) State of implementation of vocational ability evaluations (Figures 35 and 36)

The proportion of businesses that implemented vocational ability evaluations was 66.2% (previous survey: 68.2%), slightly decreased from the previous year. By industry, the proportions were as follows: high in Combined services (94.8%), Finance and insurance (83.9%), and so on, whereas low in Real estate and rental services (55.9%), Transport and post (56.9%) and Other services (services other than those categorized) (57.6%). Categorized by size of the business, more vocational ability evaluations were implemented at larger businesses. In particular, the figure was high at businesses that have 100 or more employees, in the 60% range at businesses with 100 to 299 employees, in the 70% range at businesses with 300 to 999 employees and at businesses with 1,000 or more employees.

Figure 35 Businesses implementing vocational ability evaluations (total)

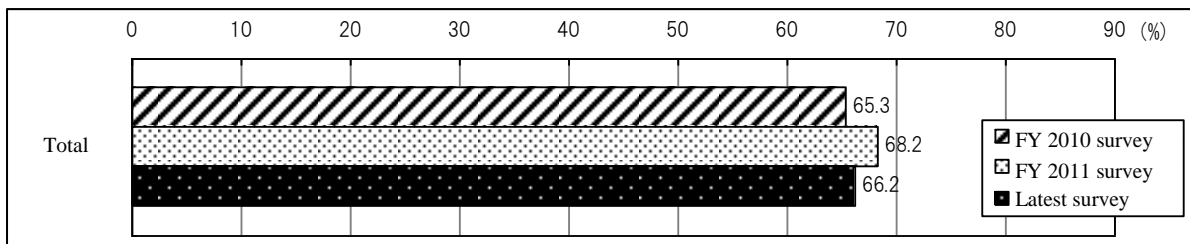
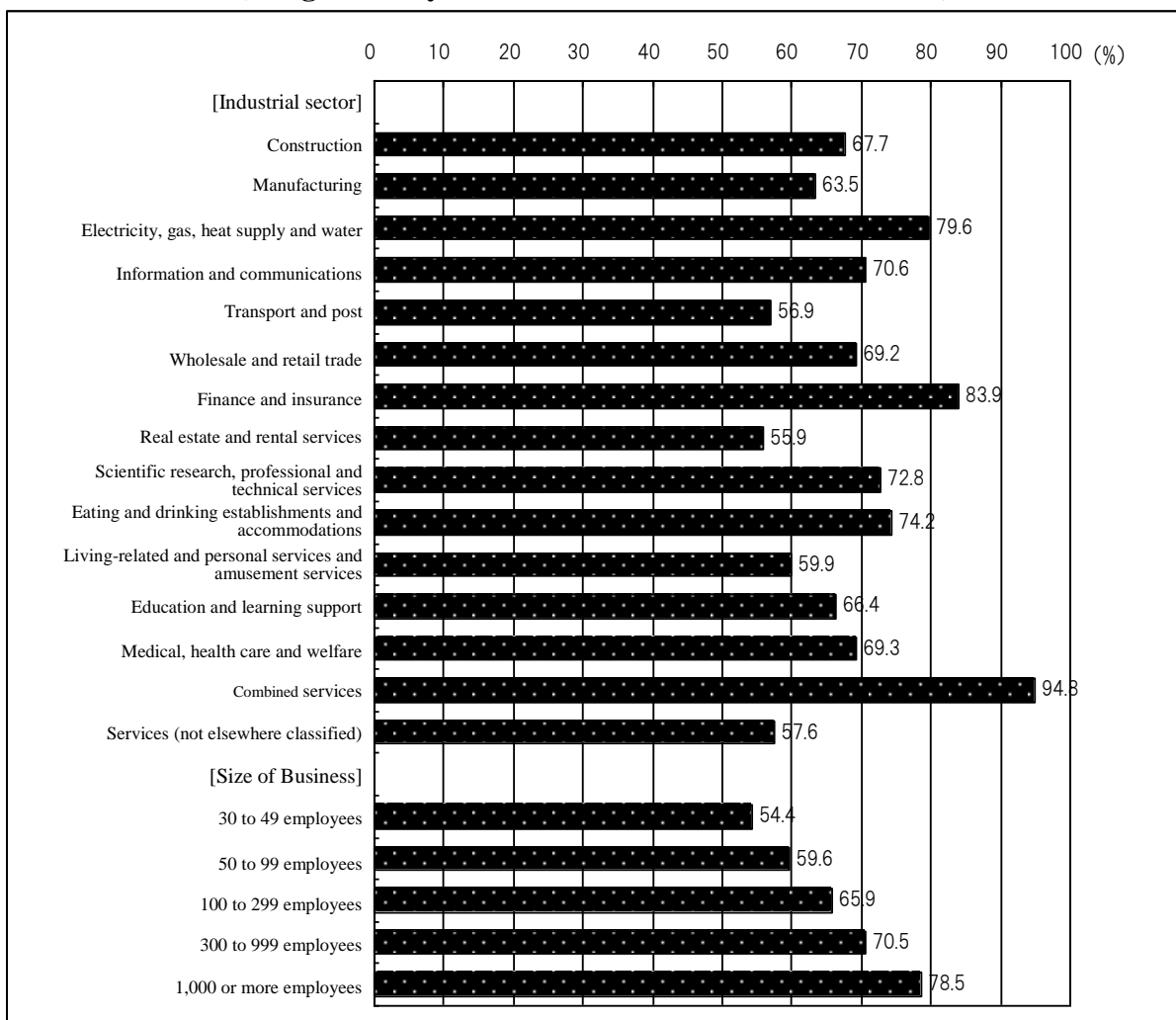


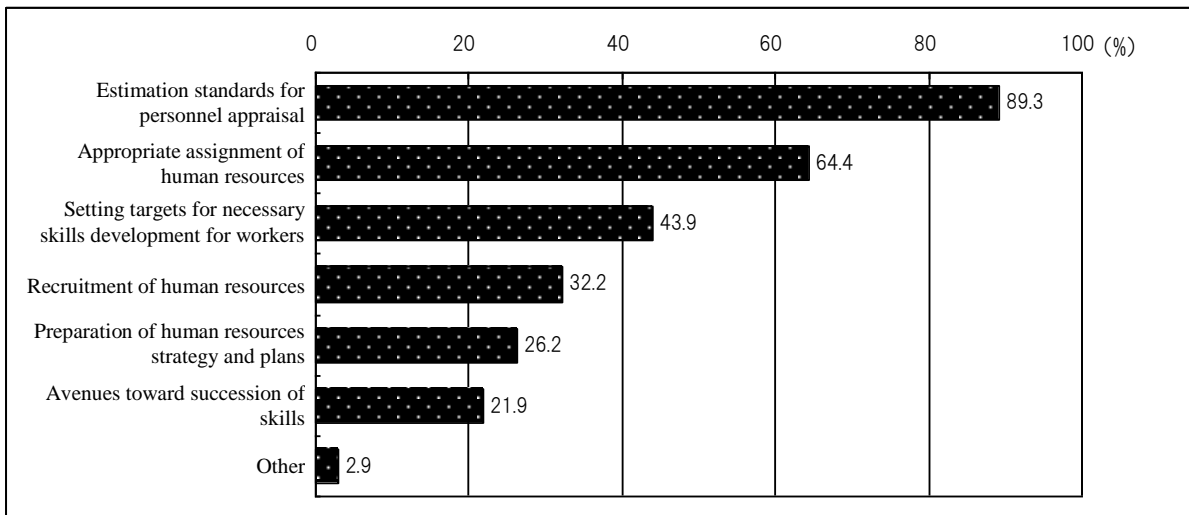
Figure 36 Businesses implementing vocational ability evaluations (categorized by industrial sector and size of business)



2) Methods for utilization of vocational ability evaluations (Figure 37)

Concerning methods for utilization of vocational ability evaluations (multiple answers allowed), the response “Estimation standards for personnel appraisal” was the highest at 89.3% (previous survey: 89.5%), followed by “Appropriate assignment of human resources” at 64.4% (previous survey: 61.6%), and “Setting targets for necessary skills development for workers” at 43.9% (previous survey: 42.6%).

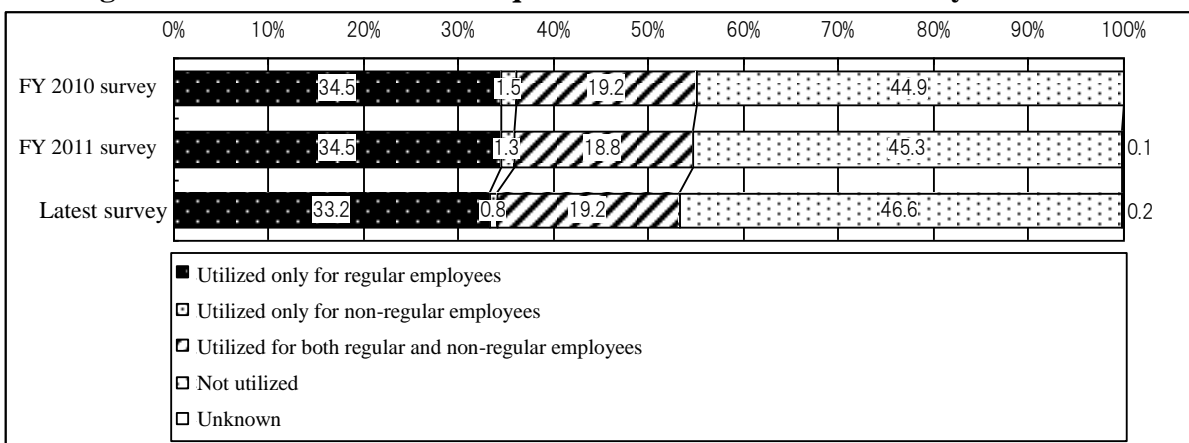
Figure 37 Methods for utilization of vocational ability evaluations (multiple answers allowed)



3) State of utilization of qualifications in vocational ability evaluations (Figures 38 and 39)

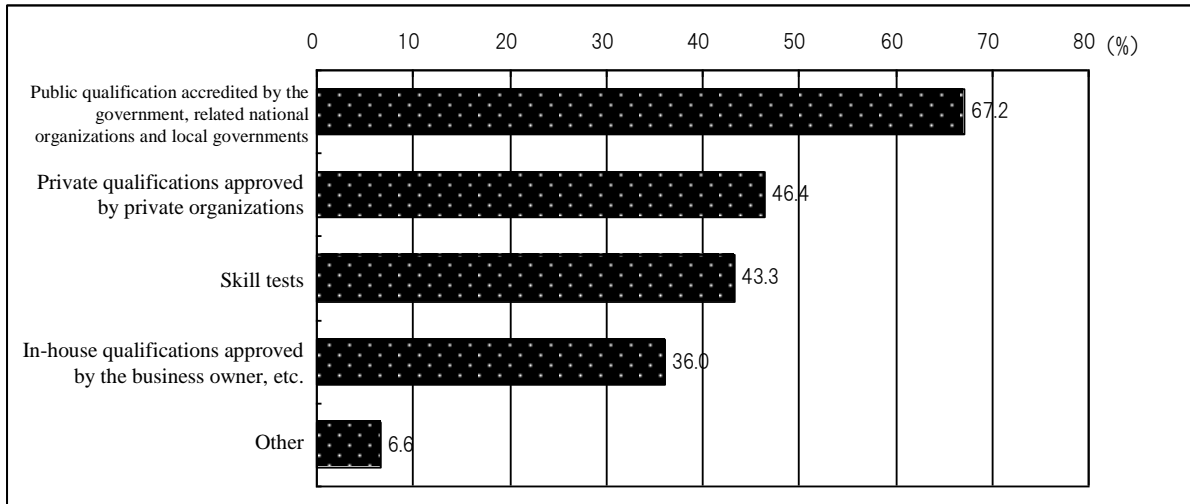
Concerning the state of utilization of qualifications in vocational ability evaluations among businesses that implemented vocational ability evaluations, 33.2% (previous survey: 34.5%) of businesses responded “Utilized only for regular employees”, and 19.2% (previous survey: 18.8%) responded “Utilized for both regular and non-regular employees”.

Figure 38 State of utilization of qualifications in vocational ability evaluations



In addition, with respect to utilized qualifications, typical responses included “Official qualifications other than skill tests approved by the national government, relevant government agency, local government, etc.” at 67.2% (previous survey: 66.9%), “Private qualifications approved by private organizations” at 46.4% (previous survey: 43.6%), and “Skill tests” at 43.3% (previous survey: 47.9%).

Figure 39 Utilized qualifications (multiple answers allowed)



4) Issues with vocational ability evaluations (Figures 40, 41 and 42)

Among responding businesses, 68.0% (previous survey: 66.8%) responded that they had issues with vocational ability evaluations. By industry, the proportions were as follows: high in Information and communications (79.0%), Wholesale and retail trade (77.2%), Manufacturing (74.4%) and so on, whereas low in, Electricity, gas, heat supply and water (44.9%), and Combined services (48.8%). Regarding the nature of the issues (multiple answers allowed), the proportion of businesses that responded “Difficult to establish fair evaluation items for all sectors and vocations” (76.7% [previous survey: 79.0%]) was high, followed by “Evaluation content varies due to evaluators’ lack of awareness about evaluation criteria” (40.2% [previous survey: 41.7%]).

Differences between categories by business size were small, though the rate was high in the 70% range among businesses with 100 to 999 employees.

Figure 40 Businesses that responded that they had issues with vocational ability evaluations (total)

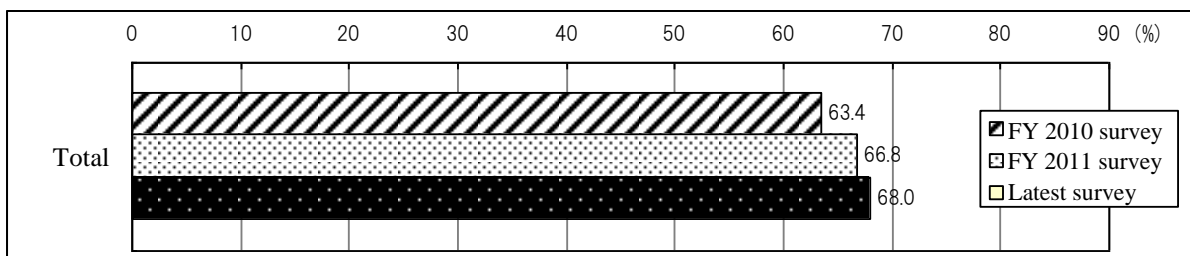


Figure 41 Businesses that responded that they had issues with vocational ability evaluations (categorized by industrial sector and size of business)

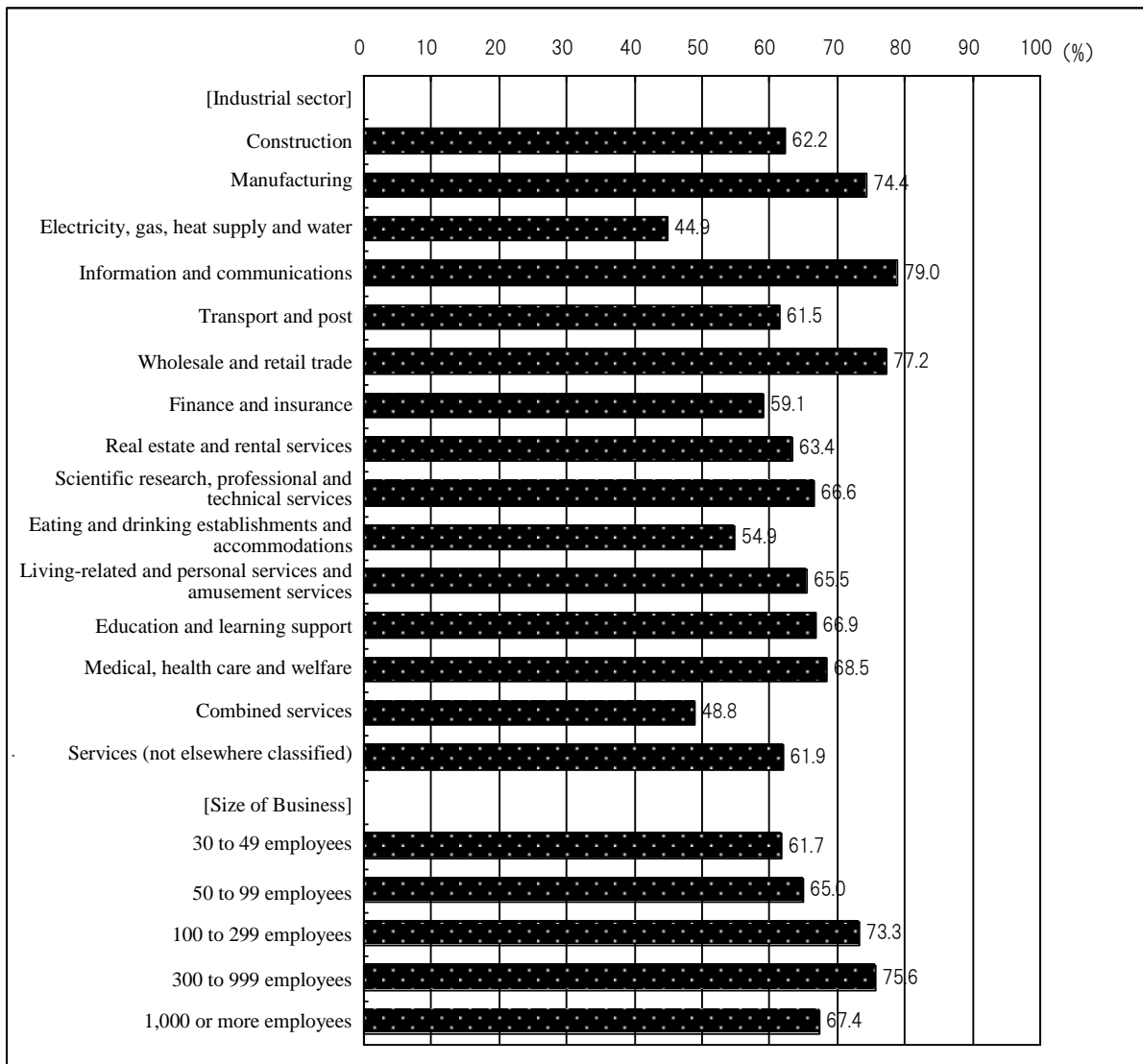
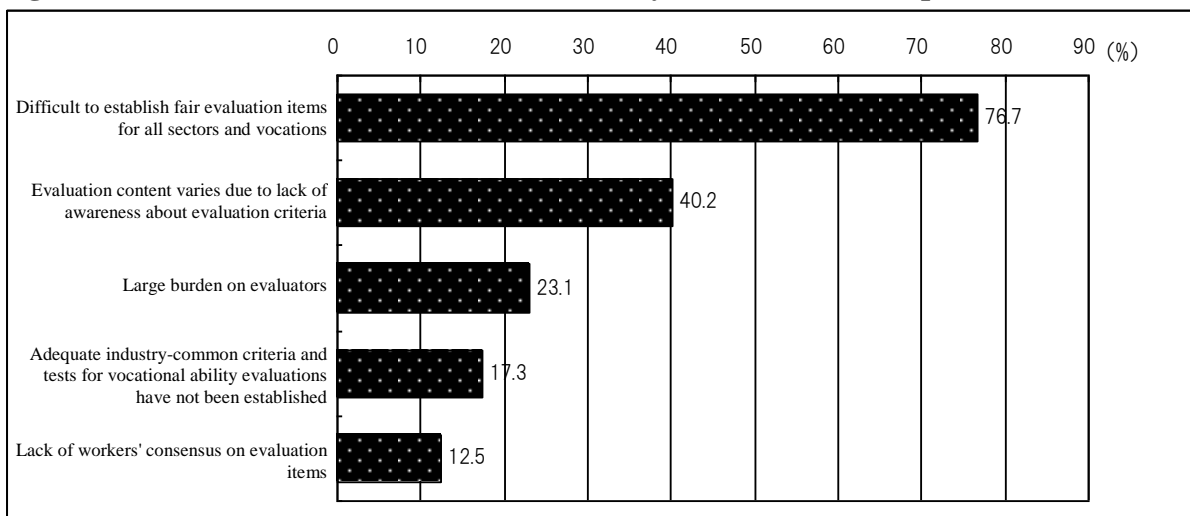


Figure 42 Nature of issues with vocational ability evaluations (multiple answers allowed)



5) Creation of cross-sectoral criteria for vocational ability evaluations (Figures 43, 44 and 45)

Among responding businesses, 73.7% (previous survey: 73.6%) businesses responded that there are merits to creating a vocational ability evaluation criteria, which organize abilities sought by each vocation in a cross-sectoral manner. By industry, the proportions were as follows: Information and communications (81.0%), Manufacturing (78.2%) and so on, whereas low in Electricity, gas, heat supply and water (58.1%), Transport and post (64.3%) and so on. Regarding the nature of merits (multiple answers allowed), the proportion of businesses that responded “It can double as a criteria for education and training of workers” (58.2% [previous survey: 55.0%]) and “It can be used effectively for the creation and improvement of the company’s vocational ability evaluation system” (47.8% [previous survey: 49.7%]) were high.

Figure 43 Businesses that responded that there are merits with creating cross-sectoral criteria for vocational ability evaluations (total)

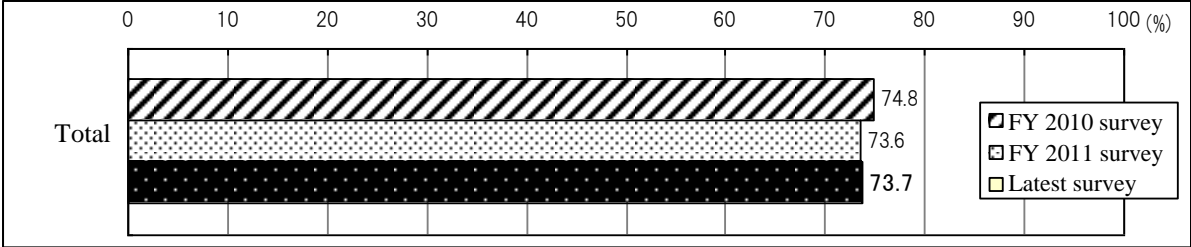


Figure 44 Businesses that responded that there are merits with creating cross-sectoral criteria for vocational ability evaluations (categorized by industrial sector and size of business)

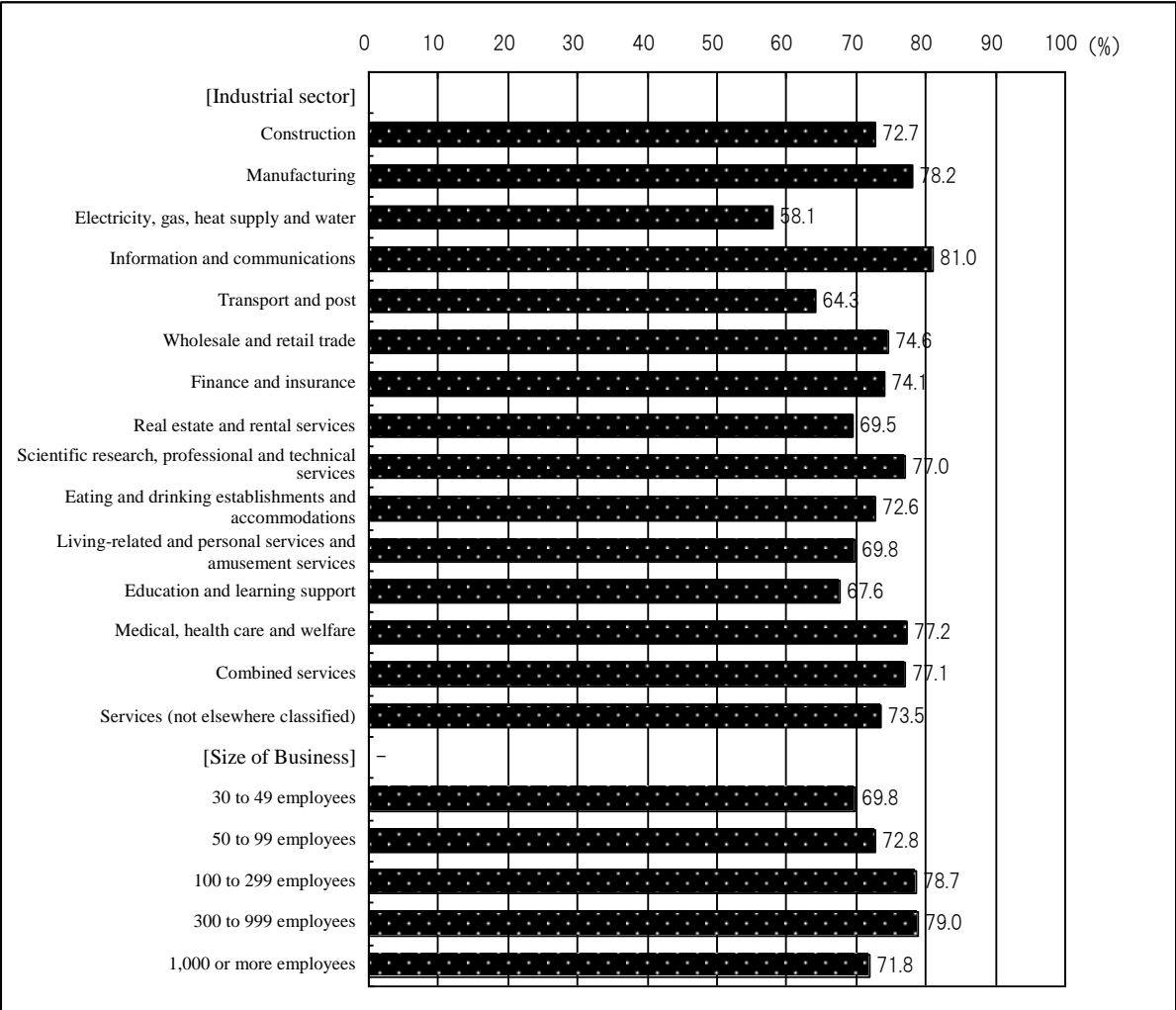
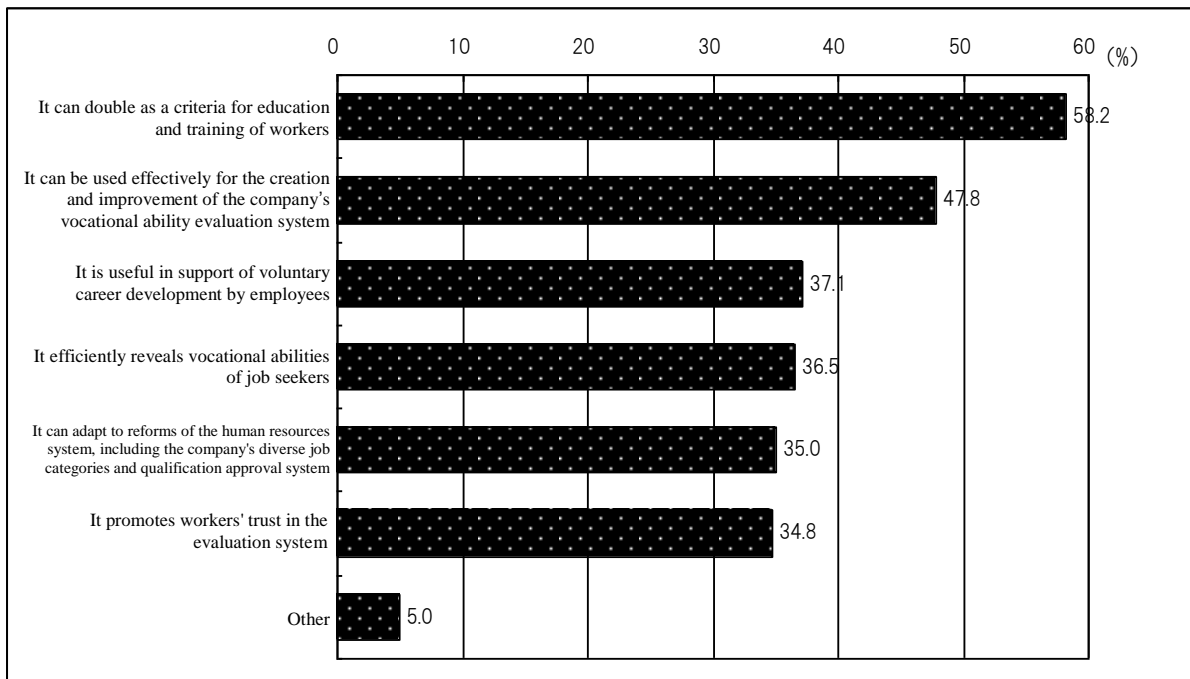


Figure 45 Nature of merits of creating cross-sectoral criteria for vocational ability evaluations (multiple answers allowed)



(5) National Trade Skill Test system conducted by the Ministry of Health, Labour and Welfare

1) Awareness of the National Trade Skill Test system (Figures 46 and 47)

The National Trade Skill Test system, conducted by the Ministry of Health, Labour and Welfare, was known to 51.0% (previous survey: 48.9%) of responding businesses, slightly increased from the previous year. By industry, the proportions were high in Manufacturing (65.5%), Construction (64.8%), Combined services (62.5%), while low in Education and learning support (26.4%), Medical, health care and welfare (34.6%).

Figure 46 Businesses that know about the National Trade Skill Test system (total)

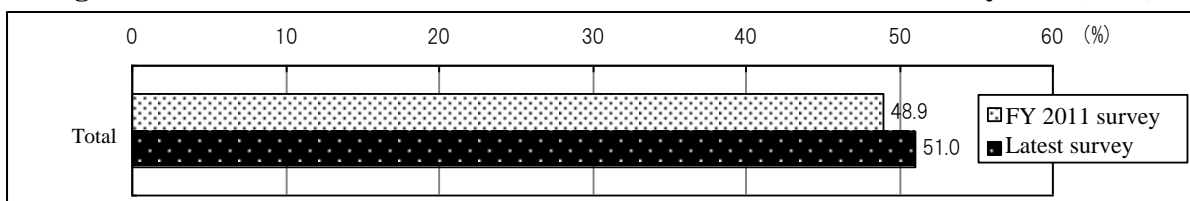
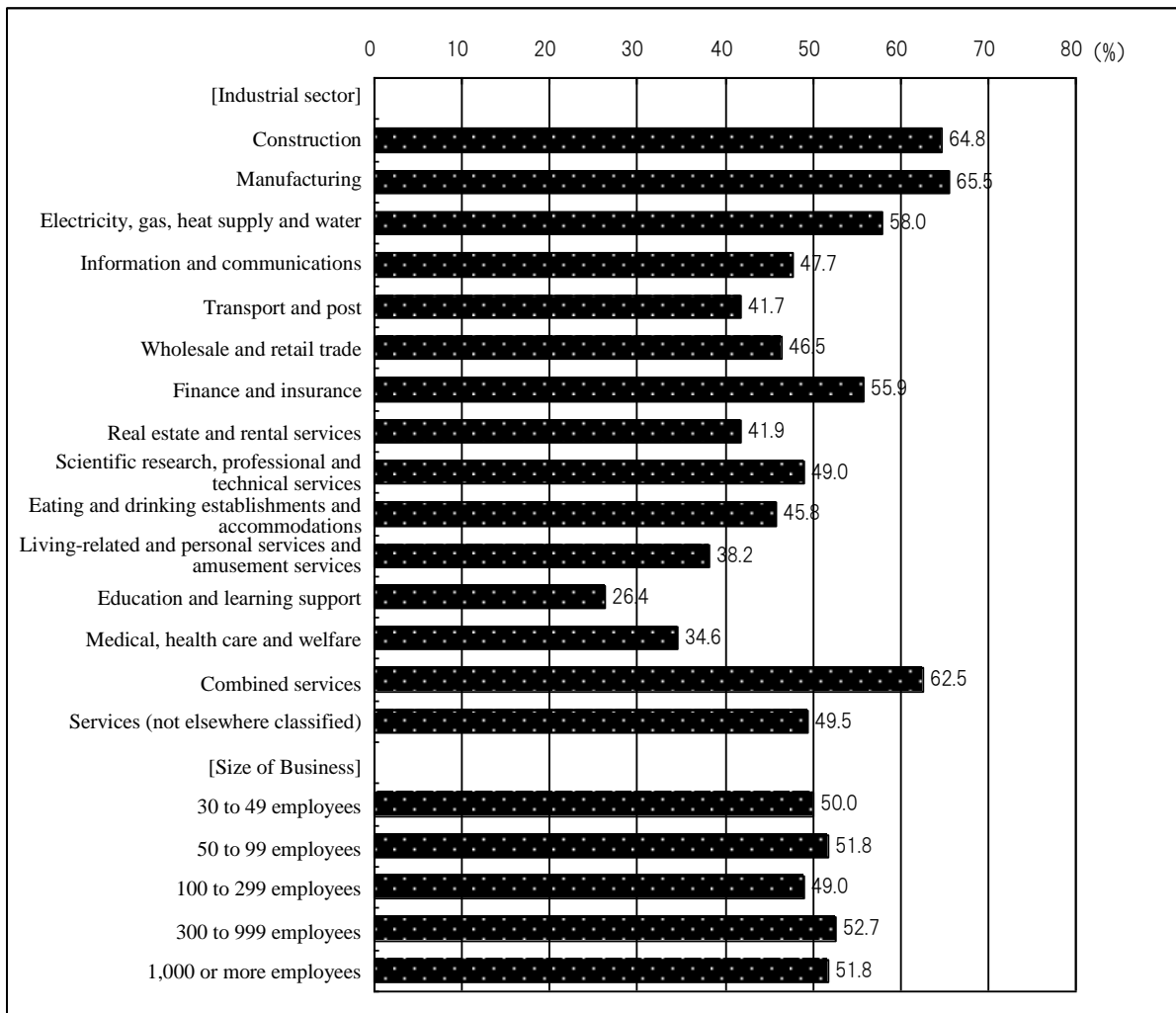


Figure 47 Businesses that know about the National Trade Skill Test system (categorized by industrial sector and size of business)



2) Benefits and problems of the National Trade Skill Test (Figures 48 and 49)

With respect to merits of the National Trade Skill Test (multiple answers allowed), the highest proportion of businesses selected “Useful for improving vocational recognition and abilities of workers” (86.8%) (previous survey: 86.9%).

With respect to problems in the National Trade Skill Test (multiple answers allowed), the rates were high for “The scope and content of the National Trade Skill Test do not match skills required on frontlines” (41.7%) (previous survey: 39.7%) and “Frequency and venues of the National Trade Skill Test are limited” (41.6%) (previous survey: 39.5%), followed by “It takes workers much time for preparing for and undergoing the test” (31.4%) (previous survey: 31.8%) and “The test fee is expensive” (28.2%) (previous survey: 28.7%).

Figure 48 Benefits of the National Trade Skill Test (multiple answers allowed)

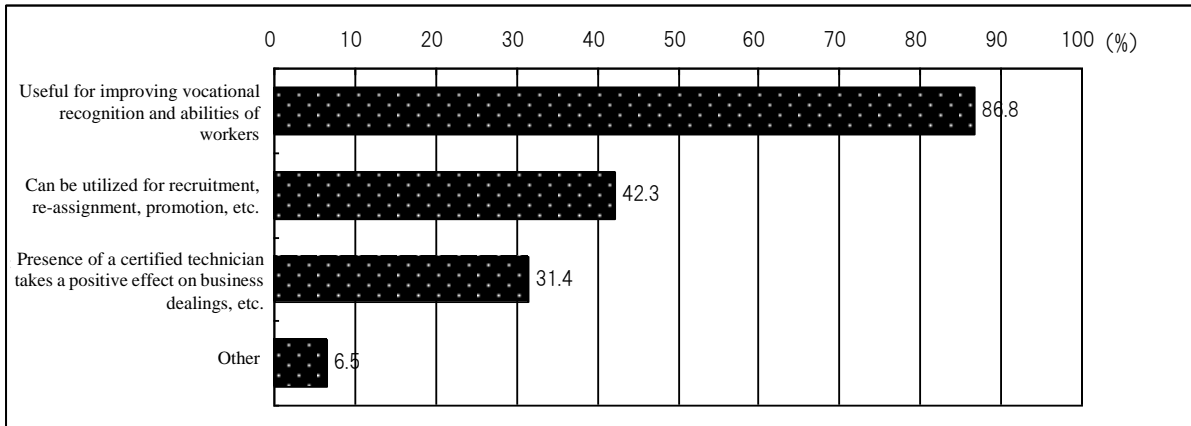
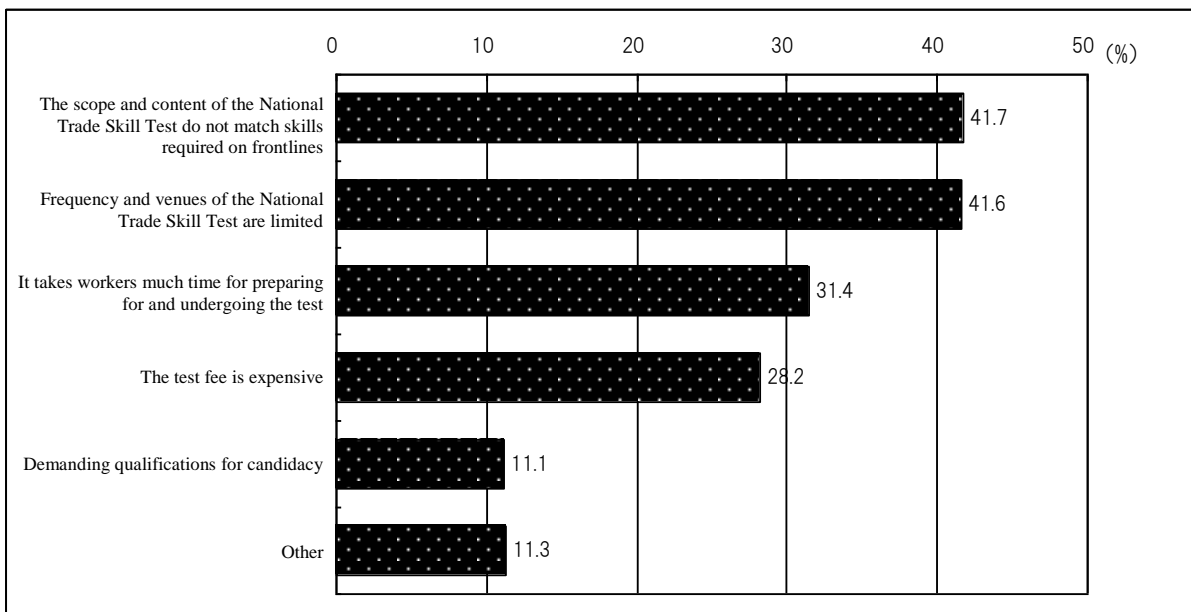


Figure 49 Problems in the National Trade Skill Test system (multiple answers allowed)



(6) Succession of skills

1) Issues with succession of skills (Figures 50 and 51)

Among responding businesses, 27.9% (previous survey: 28.2%) responded that they had an issue with the succession of skills when the baby-boom generation retires and so on. By industry, the proportions were as follows: high in Electricity, gas, heat supply and water (75.3%), Construction (52.9%), Manufacturing (45.2%), and Scientific research, professional and technical services (41.4%), whereas low in Living-related and personal services and amusement services (10.1%), Eating and drinking establishments and accommodations (11.9%) and so on.

Figure 50 Businesses that responded that they had an issue with the succession of skills when the baby-boom generation retires and so on (total)

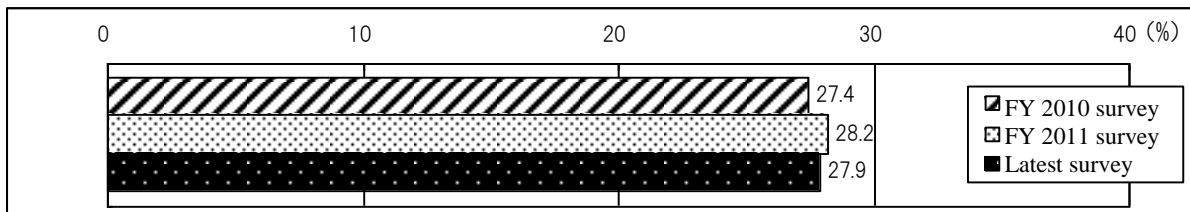
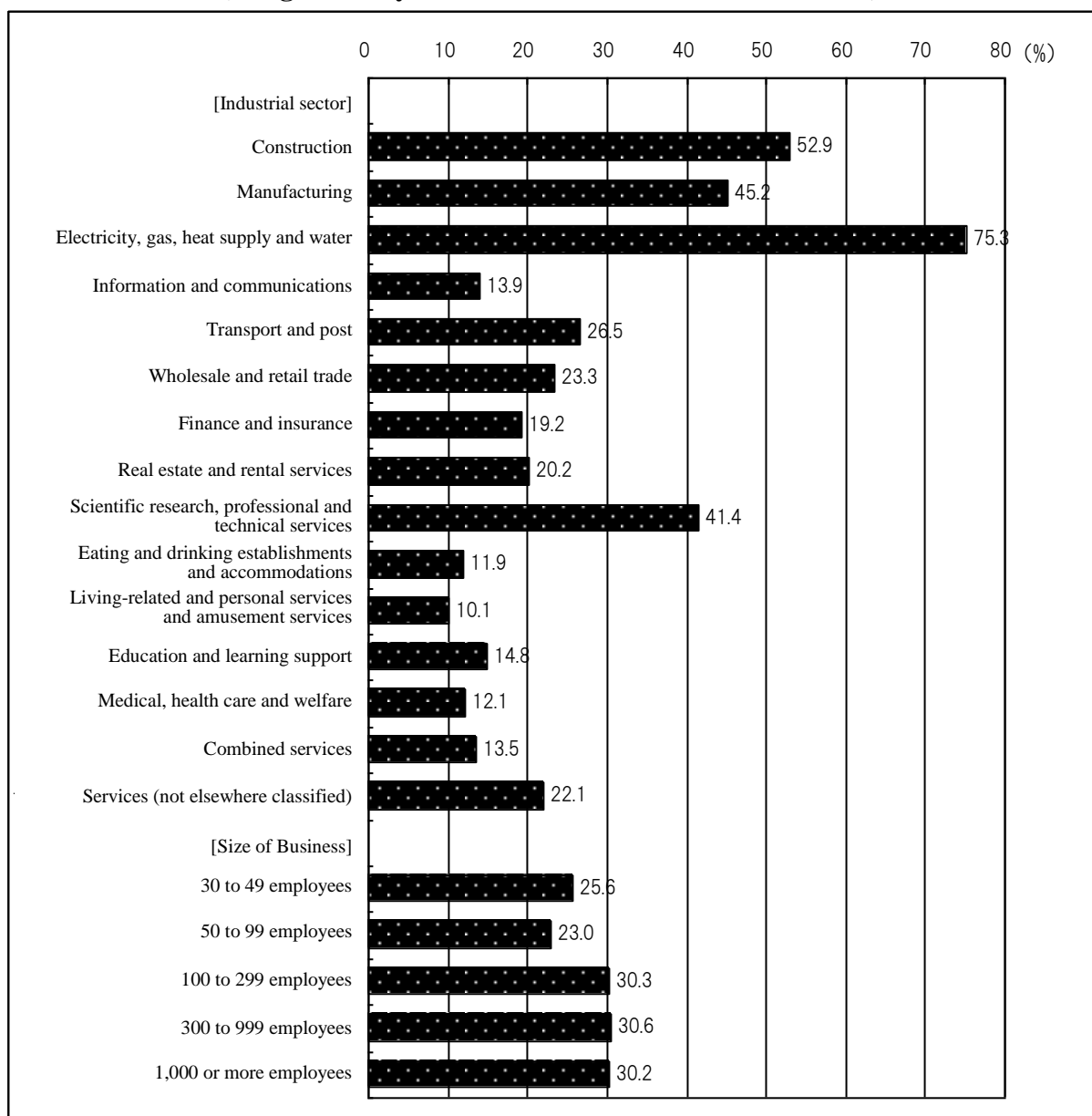


Figure 51 Businesses that responded that they had an issue with the succession of skills when the baby-boom generation retires and so on (categorized by industrial sector and size of business)



2) State of initiatives concerning succession of skills (Figures 52 and 53)

Among responding businesses, 77.9% (previous survey: 78.0%) responded that they were 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 extend their employment or re-employ them as instructors” at 58.6% (previous survey: 61.2%), followed by “We are increasing mid-career hiring” (30.1% [previous survey: 28.9%]), “We pass on skills, etc. to young and middle-aged staff through special education and training for the succession of skills” (21.1% [previous survey: 21.1%]).

Figure 52 Businesses that are taking initiatives towards the succession of skills (total)

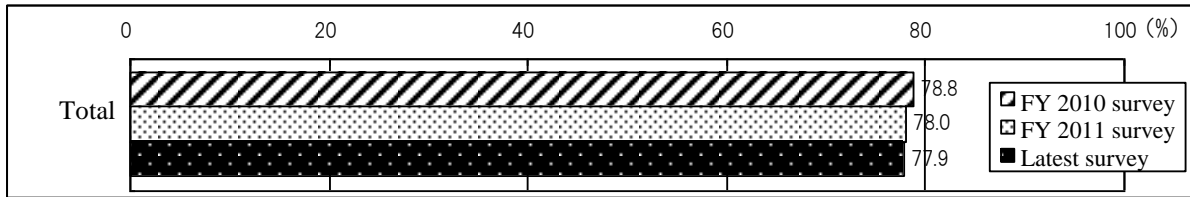
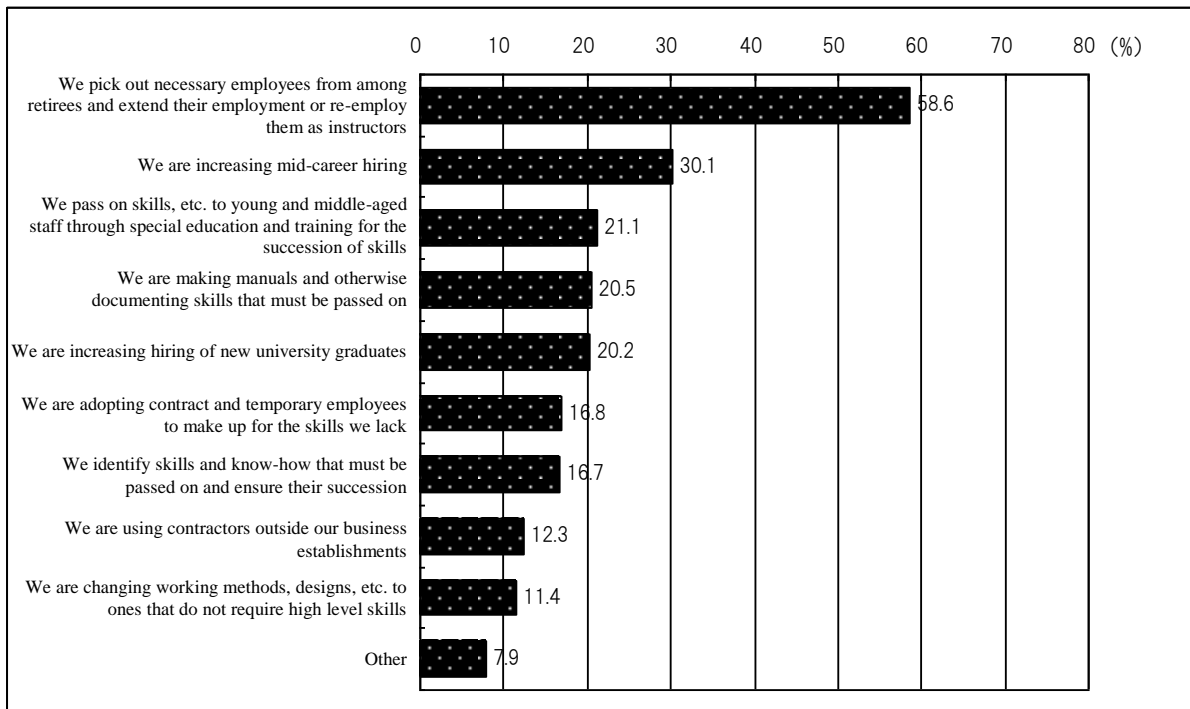


Figure 53 Nature of initiatives taken by businesses towards the succession of skills (multiple answers allowed)



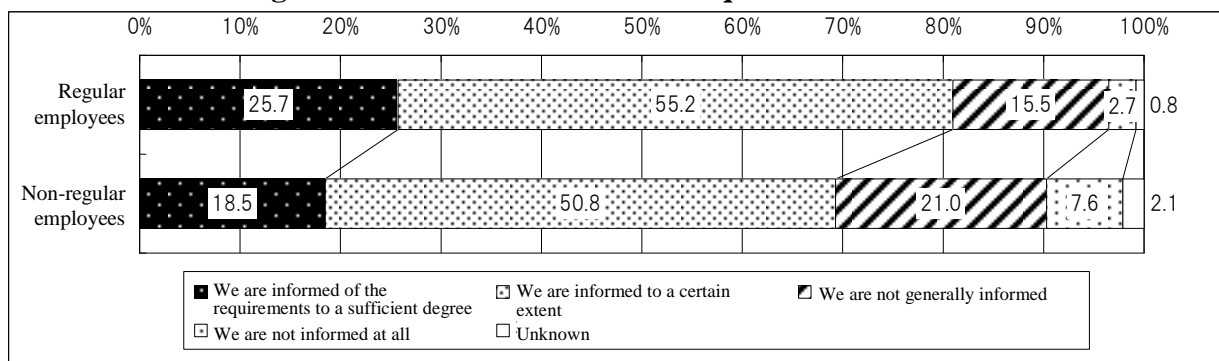
3. Individual Survey

(1) Education and training attended through the company

1) Awareness of abilities required of workers (Figure 54)

Concerning awareness of abilities required of workers, 25.7% (previous survey: 24.0%) of regular employees reported “We are informed of the requirements to a sufficient degree”, while 55.2% (previous survey: 56.3%) responded “We are informed to a certain extent”, which means that 80.9% (previous survey: 80.3%) of workers are informed of the requirements. On the other hand, 18.5% (previous survey: 19.3%) of non-regular employees reported “We are informed of the requirements to a sufficient degree”, while 50.8% (previous survey: 50.0%) responded “We are informed to a certain extent.” Overall non-regular employees were informed at 69.3%, a ratio lower than that of regular employees by 11.6 points. The ratio of non-regular employees who responded “We are generally not informed” or “We are not informed at all” stood at 28.6% (previous survey: 28.7%), 10.4 points higher than that of regular employees, showing a significant gap between regular employees and non-regular employees.

Figure 54 Awareness of abilities required of workers



2) State of participation in OFF-JT (Figures 55 and 56)

The ratio of workers who participated in OFF-JT in fiscal 2011 was 39.2% (previous survey: 41.4%) of regular employees and 18.6% (previous survey: 19.2%) of non-regular employees. By industry, for regular employees, the proportions were as follows: high in Scientific research, professional and technical services (48.7%), Electricity, gas, heat supply and water (47.6%), Information and communications (47.5%) and so on, whereas low in Eating and drinking establishments and accommodations (25.5%), Living-related and personal services and amusement services (25.8%) and so on. For non-regular employees, the proportions were as follows: high in Medical, health care and welfare (29.4%) and so on, whereas low in Living-related and personal services and amusement services (11.2%) and so on. Between regular and non-regular employees, there were large differences in the ratio of workers who participated in OFF-JT in the following industries: Scientific research, professional and technical services, Electricity, gas, heat supply and water, Manufacturing, and Information and communications.

Categorized by size of the business, the participation ratio of both regular and non-regular employees increased as the size of the business is bigger. For regular employees, the figure stood around 40% for companies with 300 to 999 employees, and in the 50% range for companies with 1,000 or more employees. The difference in ratio is significant between companies of different sizes. On the other hand, the difference is small between companies for non-regular employees.

Figure 55 Workers who participated in OFF-JT (total)

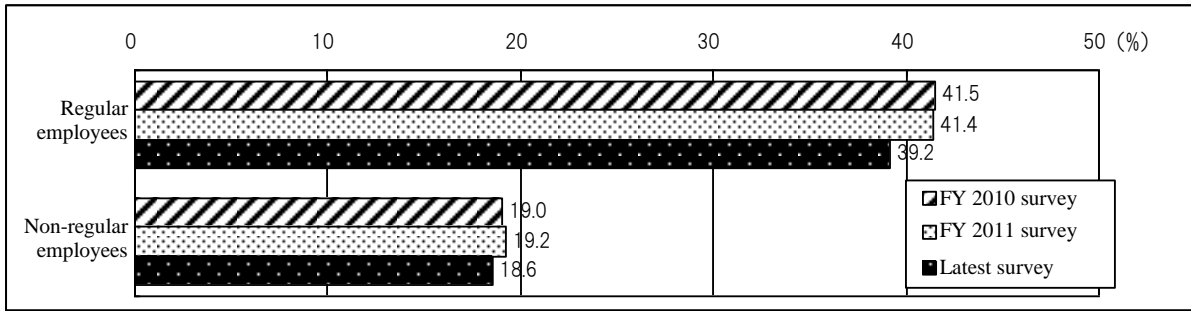
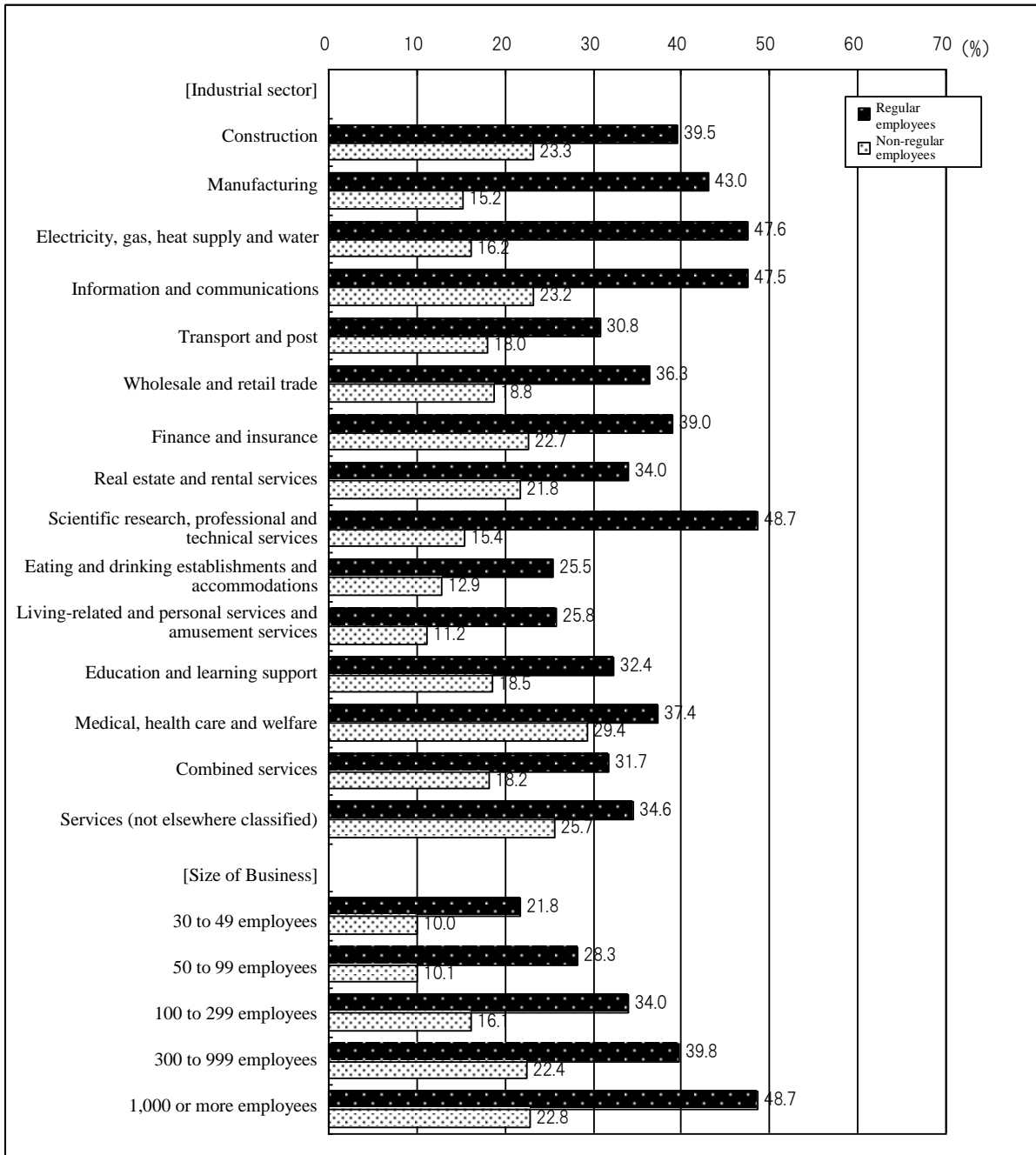


Figure 56 Workers who participated in OFF-JT (categorized by industrial sector and size of business)



3) Total number of hours spent in OFF-JT attended by employees (Figures 57 and 58)

The average total number of hours spent in attending OFF-JT was 38.0 hours, down 1.5 hours from the previous year (previous survey: 39.5 hours) for regular employees, and 15.0 hours, down 6.6 hours from the previous year (previous survey: 21.6 hours), the longest ever time since this survey was started, for non-regular employees.

By industry, for regular employees, hours were long in the following industries: Electricity, gas, heat supply and water (55.1 hours), Finance and insurance (52.9 hours), Education and learning support (51.1 hours) and so on, while for non-regular employees, hours were long in Combined services (44.3 hours), and Real estate and rental services (36.0 hours).

Figure 57 Average total number of hours of OFF-JT attended by workers (total)

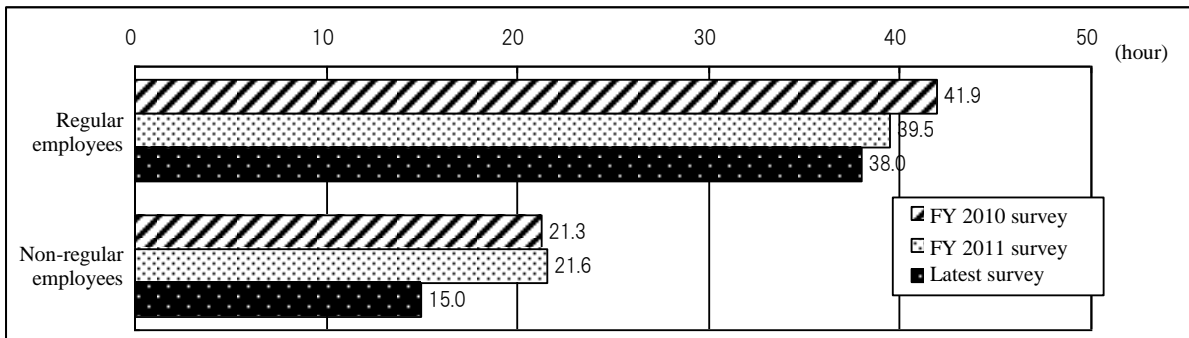
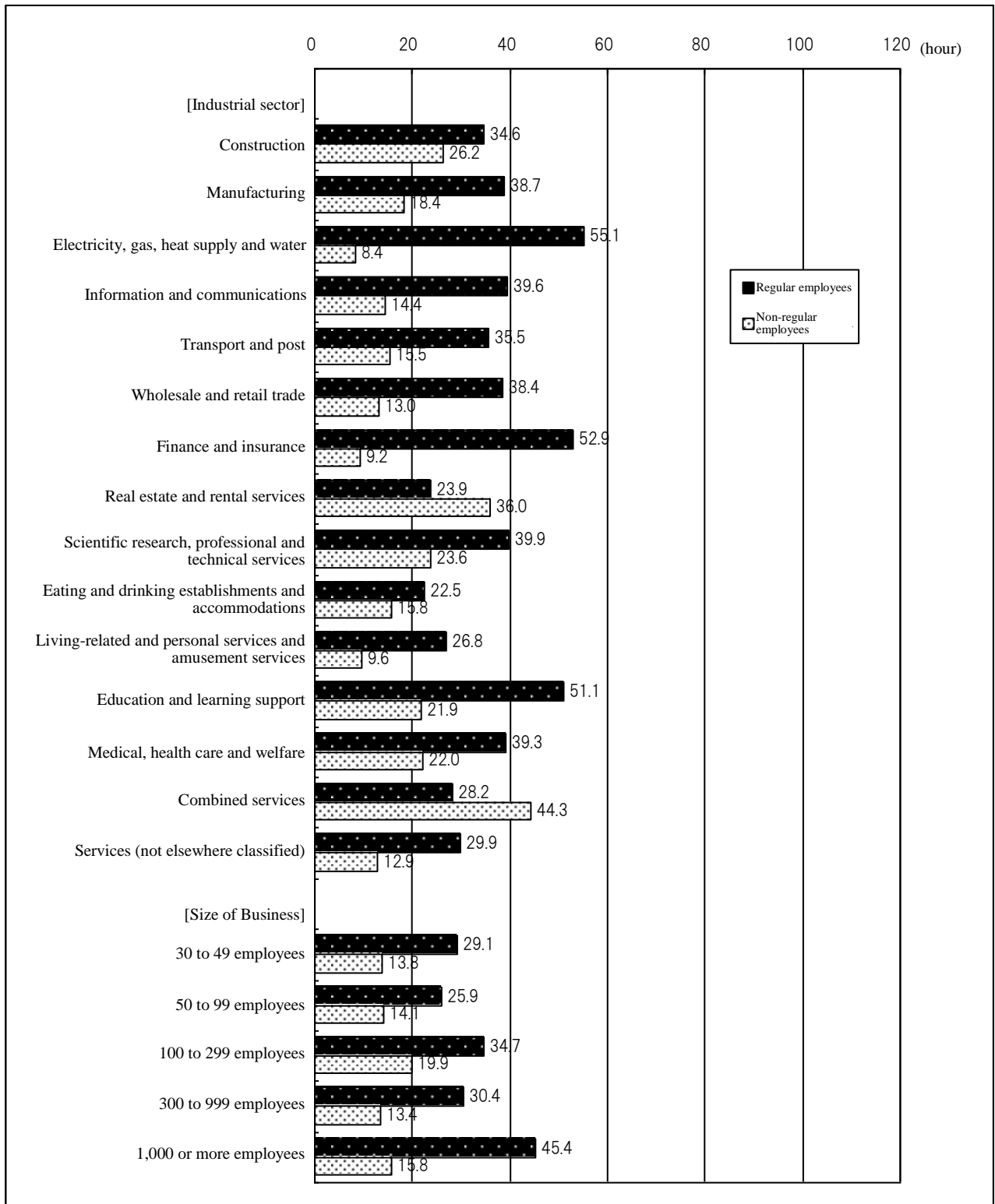


Figure 58 Average total number of hours of OFF-JT attended by workers (categorized by industrial sector and size of business)

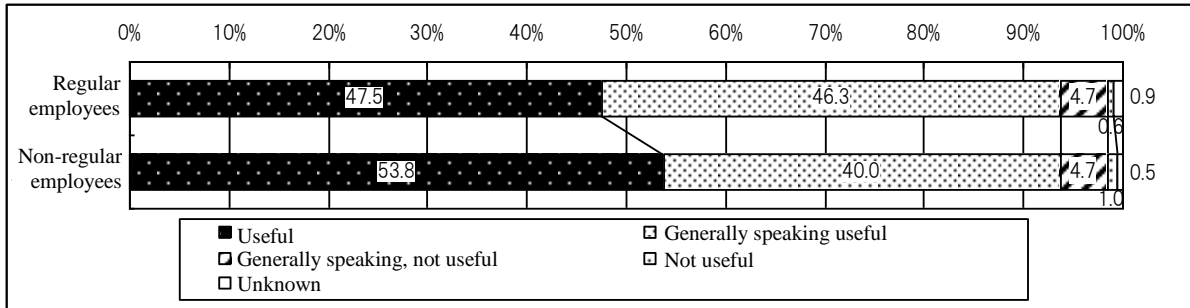


4) Usefulness of OFF-JT attended (Figure 59)

Concerning the usefulness of the OFF-JT attended, 47.5% (previous survey: 50.4%) of regular employees responded that it was “Useful”, and 46.3% (previous survey: 45.3%) responded that it was “Generally speaking, useful”, which represents an overall positive response rate at 93.8% (previous survey: 95.7%).

Similarly among non-regular employees, 53.8% (previous survey: 62.8%) responded that it was “Useful”, and 40.0% (previous survey: 32.2%) responded that it was “Generally speaking, useful”, which represents an overall positive response rate at 93.8% (previous survey: 95.0%), which remained roughly unchanged.

Figure 59 Usefulness of OFF-JT attended



(2) State of implementation of self-development

1) State of implementation of self-development (Figures 60 and 61)

The ratio of workers who undertook self-development in fiscal 2011 was 47.7% (previous survey: 43.8%) of regular employees and 22.1% (previous survey: 19.3%) of non-regular employees. The ratio of workers who undertook self-development increased from the previous fiscal year for regular employees and non-regular employees.

The average total number of hours spent in self-development by each worker was 72.1 hours (previous survey: 79.8 hours) for regular employees and 89.0 hours (previous survey: 90.5 hours) for non-regular employees. In comparison with the previous fiscal year, hours decreased for both regular employees and non-regular employees.

The average total number of hours spent in self-development by each non-regular employee decreased by 1.5 hours from the previous 90.5 hours, the largest ever since this survey was started.

Figure 60 Workers who undertook self-development

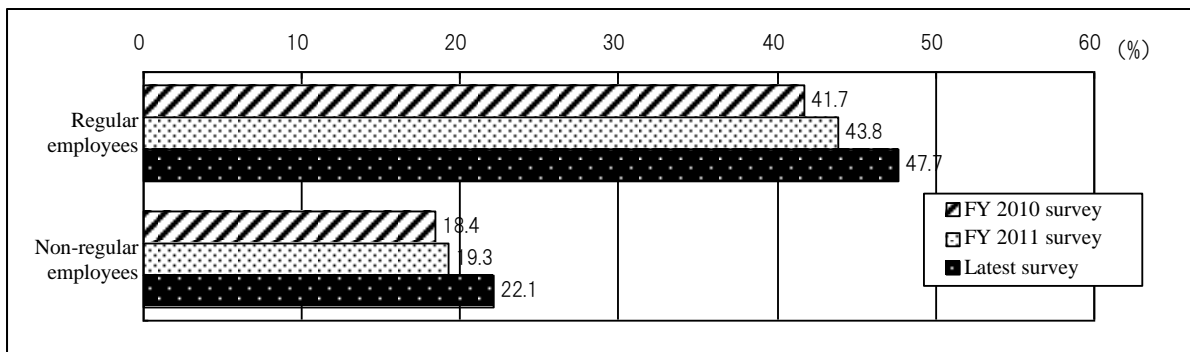
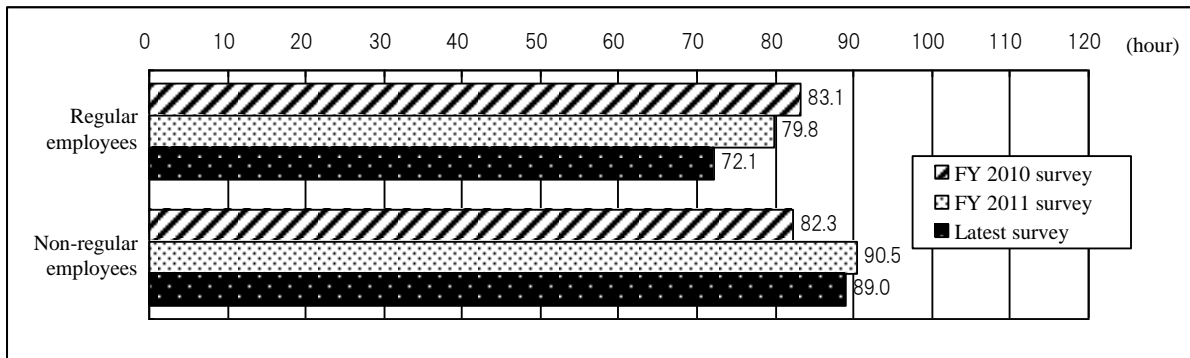


Figure 61 Average number of hours spent for self-development per worker (total)



2) Methods used for self-development (Figures 62 and 63)

Methods used for self-development were as follows (multiple answers allowed): For regular employees, “Self-study using radio, TV, textbooks, the Internet etc.” was the highest at 50.2% (previous survey: 50.2%), followed by “Participation in in-house autonomous study groups” (29.1% [previous survey: 25.2%]), “Participation in workshops and seminars at private sector training and education institutions” (23.9% [previous survey: 21.9%]), and “Participation in correspondence learning” (23.5% [previous survey: 20.8%]).

For non-regular employees, “Self-study using radio, TV, textbooks, the Internet etc.” was the highest at 51.2% (previous survey: 51.6%), followed by “Participation in in-house autonomous study groups” (26.4% [previous survey: 27.2%]). These trends were similar to those of regular employees. On the other hand, the ratio of “Participation in correspondence learning” (10.3% [previous survey: 7.7%]) was lower than that for regular employees, at about half the level.

In addition, of workers who undertook self-development, the ratio that received assistance with expenses was 44.4% (previous survey: 38.8%) of regular employees and 24.7% (previous survey: 24.0%) of non-regular employees, which was roughly at the same level as the previous year.

Figure 62 Methods used for self-development (multiple answers allowed)

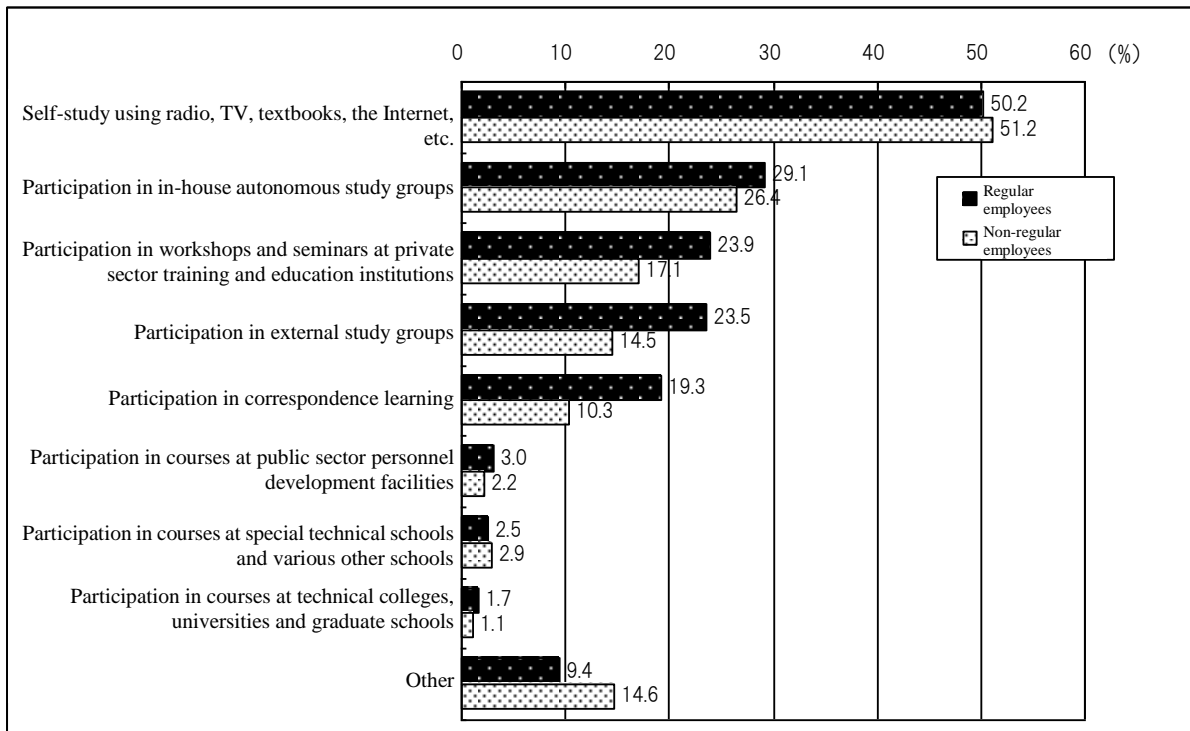
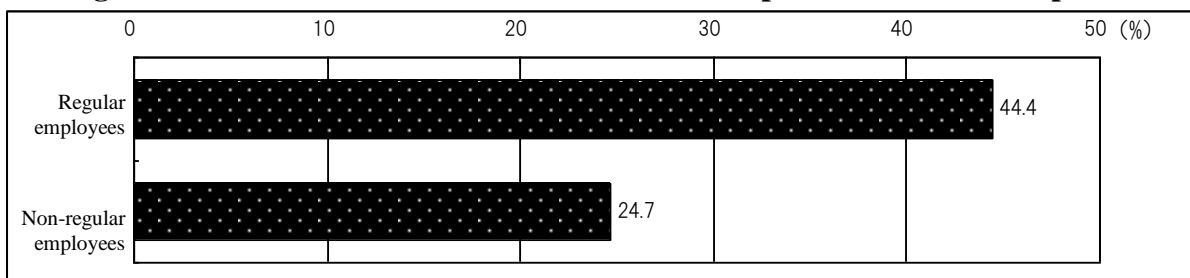


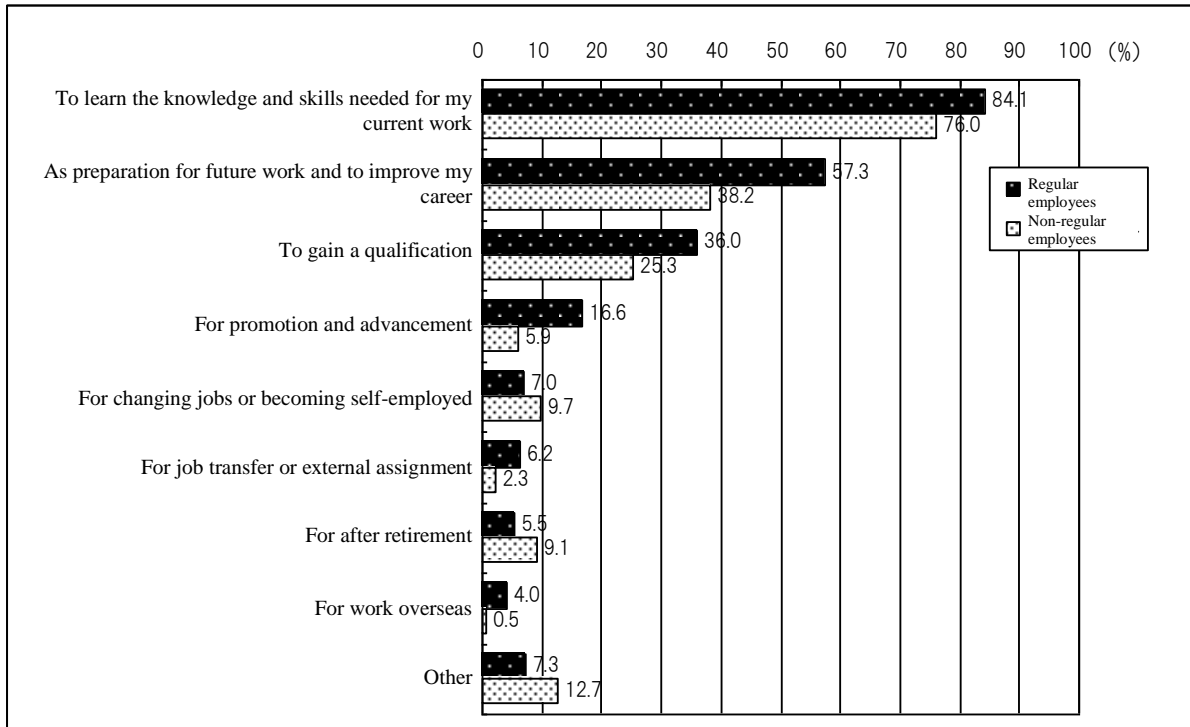
Figure 63 Workers who received assistance with expenses for self-development



3) Reasons for undertaking self-development (Figure 64)

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 84.1% (previous survey: 86.3%), followed by “As preparation for future work and to improve my career” at 57.3% (previous survey: 61.4%), and “To gain a qualification” at 36.0% (previous survey: 35.9%). There was a similar trend for non-regular employees, with “To learn the knowledge and skills needed for my current work” at 76.0% (previous survey: 81.2%), “As preparation for future work and to improve my career” at 38.2% (previous survey: 45.5%), and “To gain a qualification” at 25.3% (previous survey: 33.0%).

Figure 64 Reasons for undertaking self-development (multiple answers allowed)



4) Nature of the issues with self-development (Figures 65 and 66)

The ratio of workers who responded that there were issues with self-development was 79.4% (previous survey: 80.4%) of regular employees and 72.7% (previous survey: 74.2%) 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 56.5% (previous survey: 57.3%), followed by “It costs too much” at 34.4% (previous survey: 33.6%). These were further followed by “I don’t know what sort of course is appropriate for the career I’m aiming for” (20.1% [previous survey: 18.0%]), “I’m too busy with family matters and childcare and have no time for self-development” (18.5% [previous survey: 18.9%]), 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 34.8% (previous survey: 37.6%), but this percentage was low compared with regular employees. Different trends were also observed between regular and non-regular employees, 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” (32.5% [previous survey: 32.5%]), “I don’t know what sort of course is appropriate for the career I’m aiming for” (23.3% [previous survey: 24.3%]), and “I don’t know what career I should be aiming for” (20.9% [previous survey: 20.6%]).

Figure 65 Workers who responded that there were issues with self-development

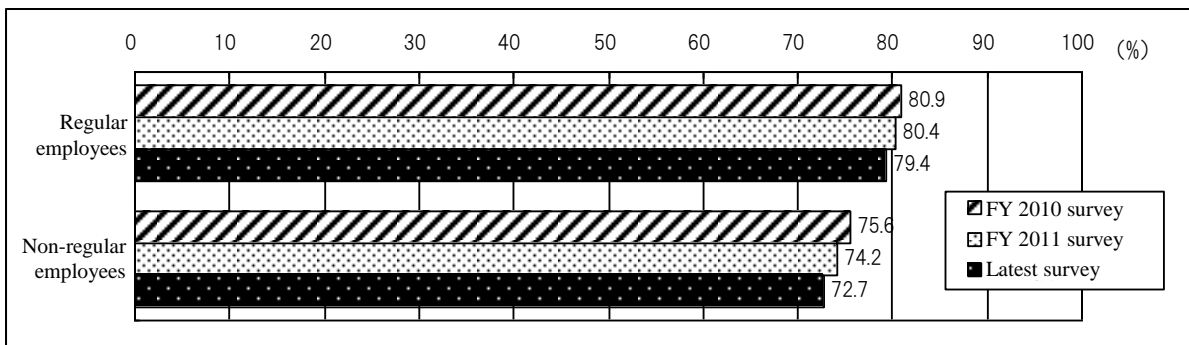
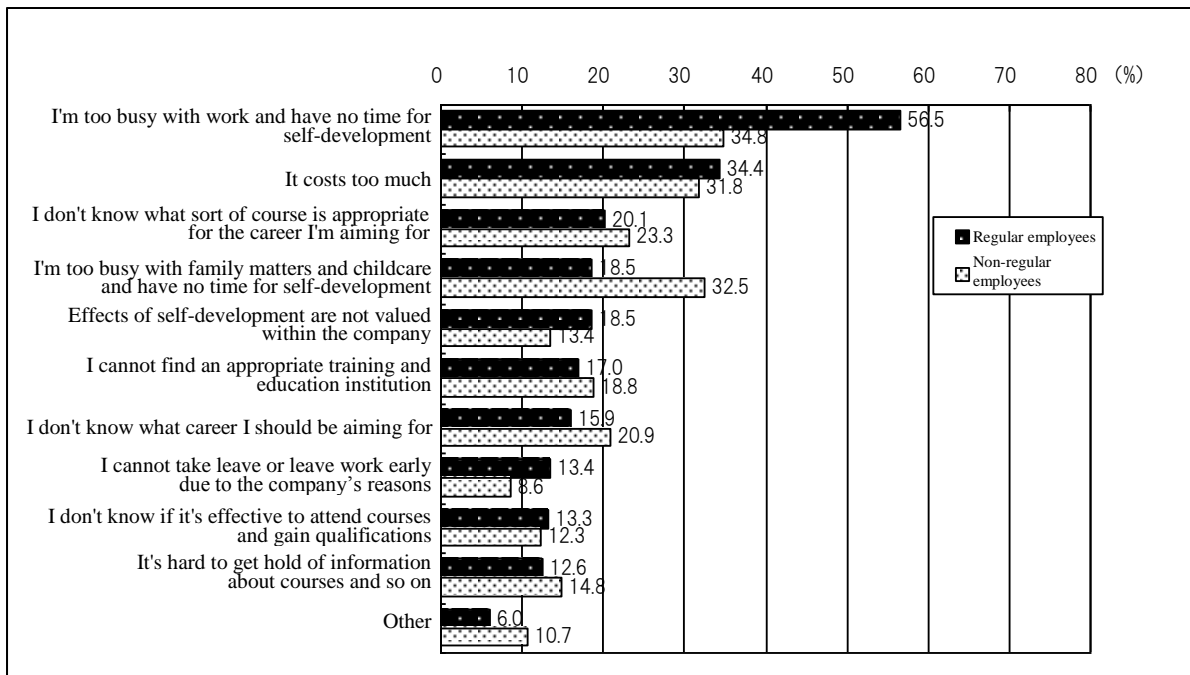


Figure 66 Issues of self-development among workers who responded that there were issues with self-development (multiple answers allowed)



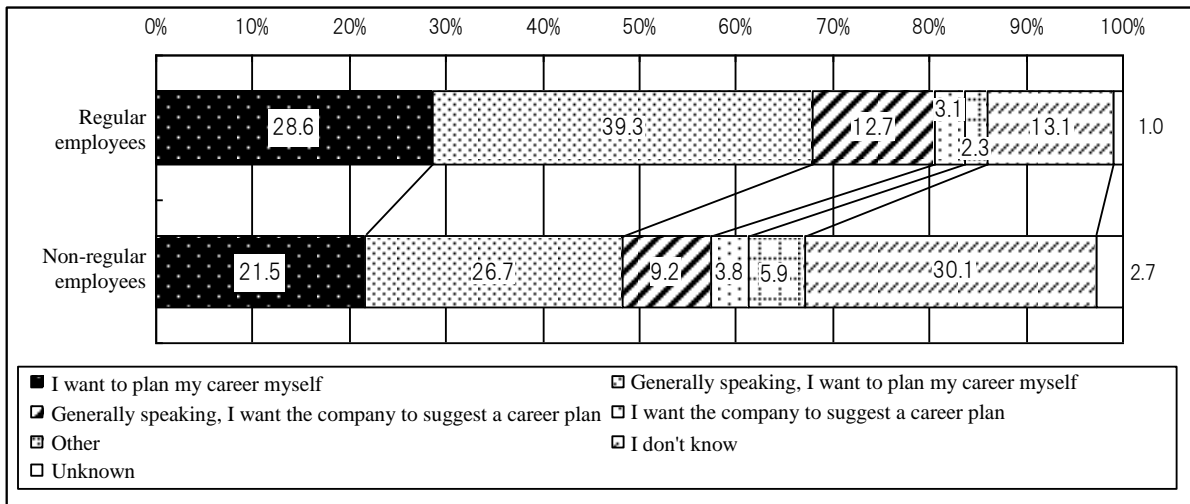
(3) Future career planning (Figure 67)

1) Thoughts on career planning

Concerning wishes of workers with regard to their own career planning, 28.6% (previous survey: 29.8%) of regular employees responded “I want to plan my career myself”, while 39.3% (previous survey: 38.6%) responded “Generally speaking, I want to plan my career myself”. The combined result shows that close to 70% (67.9% [previous survey: 68.4%]) wish to plan their careers proactively.

On the other hand, 21.5% (previous survey: 20.7%) of non-regular employees responded “I want to plan my career myself”, while 26.7% (previous survey: 27.4%) responded “Generally speaking, I want to plan my career myself”, which represents only less than half (48.2% [previous survey: 48.1%]) wishing to plan their careers proactively. The proportion of non-regular employees who responded “I don't know” was 30.1% (previous survey: 26.9%), more than double the figure for regular employees (13.1% [previous survey: 11.7%]).

Figure 67 Attitude towards career planning

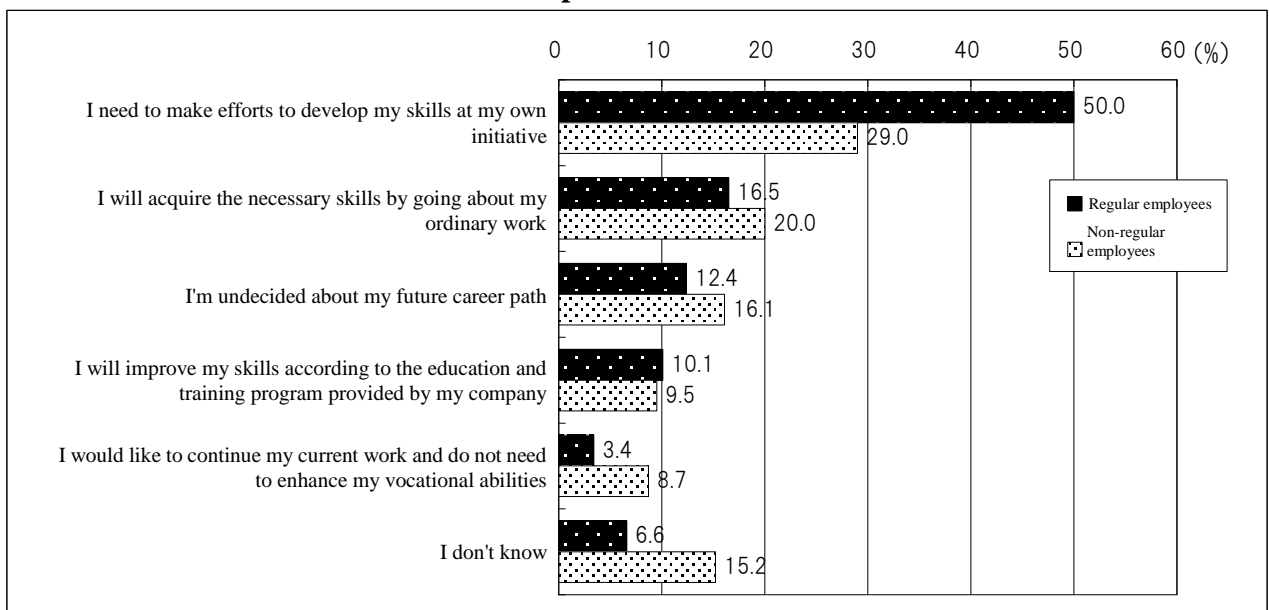


2) Conditions necessary for career improvement (Figure 68)

Concerning methods for acquiring necessary vocational abilities for workers to achieve their career aspirations, the ratio of regular employees who responded “I need to make efforts to develop my skills at my own initiative” was the highest at 50.0% (previous survey: 49.5%), followed by “I will acquire necessary skills by going about my ordinary work” at 16.5% (previous survey: 18.8%), though the gap is substantial at 33.5%.

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 29.0% (previous survey: 26.6%), but it accounted for a smaller proportion than with regular employees. For this reason, a higher ratio of non-regular employees selected “I will acquire the necessary skills by going about my ordinary work” (20.0% [previous survey: 22.5%]), indicating trends differing from those for regular employees.

Figure 68 Methods for acquiring necessary vocational abilities to achieve career aspiration



Explanation of Terms

- (1) Full-time employee
A worker who falls under either 1) or 2) of the categories below.
 - 1) A worker who is employed for no fixed period or for a fixed period of more than one month.
 - 2) A temporary or day worker who was employed for 18 days or more/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 not a part-time worker, etc.
- (3) Non-regular employee
A full-time employee, who is a short-term contract worker, contract employee, part-time worker, or worker who is employed under a similar title. Dispatched workers and contract workers not included.
- (4) OFF-JT
Education and training that are carried out pursuant to work orders, involving temporary departure from normal work. This includes, for example, training within the company (group training 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) OJT
Education and training that are carried out in the course of daily work, in which superiors directly instruct their subordinates on work procedures.
- (6) Systematic OJT
Education and training that are 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 on 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, sports for fitness, etc. which are 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, industry group, or on various existing qualifications.
- (9) Standards for vocational ability evaluations
Example of job behaviors (job implementation abilities) that bring achievements, in addition to “knowledge” and “technology and skills” that are necessary to carry out work, which are sorted by industry, occupation and duty.
- (10) Internal occupational skills development plan
“Plan that is developed by an employer to encourage the development and improvement

of its employees' occupational abilities in a step-by-step and systematic manner," which is prescribed in the Article 11 of the Human Resources Development Promotion Act.

(11) Promoters of occupational skills development

Promoters of occupational skills development should be those prescribed in the Article 12 of the Human Resources Development Promotion Act, and it is the employer's duty to assign them. Detailed duties of the promoters are as follows:

- Duties with regard to the development and implementation of internal occupational skills development plan
- Consultation, instructions, etc. concerning occupational skills development provided to the employees

(12) New employee

An employee who has been working at the company for approximately three or less years.

(13) Mid-career employee

An employee who does not fall under the categories of management and new employee.

(14) Management

A person who is responsible for management or supervision.

(15) Leave system for education and training

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

(16) Job card system

A system to encourage a wide range of job seekers to shift to a more stable job through detailed career consultations, provision of opportunities for practical vocational training (vocational ability development program) and incorporation of ability evaluation by companies and training institutions, job history, etc. into the Job Card.

(17) Career development promotion subsidy

A subsidy to help fund some of the costs and wages, etc. which is awarded to providers of systematic vocational training, etc. for workers, as well as businesses which make cost considerations, etc. to enable workers to receive vocational skills development autonomously.

(18) Career consulting

Consultations to enable an individual to plan his or her career in accordance with his or her aptitude and work experience, and to select a job function and undertake relevant personal development effectively.

(19) Career consultant

An expert who provides consultations to enable an individual to plan his or her career in accordance with his or her aptitude and work experience, and to select a job function and undertake relevant personal development effectively.

(20) Career planning

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

(21) Self-reporting system

A system for reporting the wishes of each worker to the company concerning skills development, personnel transfers, and other items.

(22) Internal job posting system

A system which allows employees to be recruited freely through in-house job postings if there is a shortage of workers for a specific project or program, and ordinarily allows employees to apply for these openings without going through their superiors.

(23) Skills test

A national screening system, pursuant to the Human Resources Development Promotion Act, for screening the level of skills possessed by the worker and providing authentication.

(24) State of working

1) Mainly working

A state in which a person is working primarily at his or her workplace.

2) Working while going to school

A state in which a person is mainly at school but also engages in even a little bit of work.

3) Working between household chores

A state in which a person is mainly engaged in household chores (including child rearing, caring for the elderly, and nursing for the sick) but also engages in even a little bit of work.

(25) Employment type

1) Short-time contract worker

A retired person, etc. who enters into a contract for the purpose of fixed period reemployment and is being employed.

2) Contract employee

A full-time employee who works full time with a fixed period of employment and is not a short-time contract worker.

3) Part-time worker

A full-time employee whose prescribed daily working hours are shorter than those of regular employees, or whose prescribed weekly number of work days are shorter than those of regular employees, and are not “short-time contract workers” or “contract employees”.

4) Other

A full-time employee who is not the aforementioned “regular employee”, “short-time contract worker”, “contract employee”, and “part-time worker”.

(26) Tasks

1) Management work

Management work at the level of the division head (or equivalent) or above.

2) Specialized and technical work

Technical work which utilizes highly specialized scientific knowledge, as well as specialized work in medicine, education, law, religion, arts, and other fields.

3) Administrative work

In general, work which is carried out under the supervision of a director (including equivalent positions) and those in higher positions, namely administrative work related to general affairs, documentation, human resources, accounting, research, planning, transport, communications, production management, sales, outside duties, and operation of office equipment.

4) Sales work

Selling and purchasing products (including services), real estate, securities,

etc.; mediating, brokering and serving as an agent for the buying and selling; selling insurance; and soliciting, negotiating, acquiring work during transactions related to the buying and selling and manufacturing of products.

5) Services work

Personal services, including barbers and beauty salons, cleaners, cooking, hospitality services, and amusement services; management of residential facilities, buildings, etc. and other related services.

6) Security work

Protection of society, individuals, and assets; maintenance of law and order, etc.

7) Production process

Regulating and supervising production facilities; processing raw materials and ingredients using machinery, instruments, hand-operated tools, etc.; building, adjusting, repairing, and inspecting various machinery equipment; printmaking, printing, and bookbinding; work related to the production process and skilled work similar to production.

8) Transport and machinery operation

Operating and maneuvering locomotives, trains, cars, ships, aircrafts, etc. and other related work; and operating stationary engines and machinery and construction machinery.

9) Construction and mining

Construction; electrical work; drilling of dams and tunnels, etc.; exploration, excavation, mining, extraction, and processing of minerals (however, excludes operation of construction machinery).

10) Shipping, cleaning, packaging, etc.

Typical tasks which primarily require physical strength, including shipping, delivery, packing, cleaning, and packaging.

(27) Executives

1) Chief-level

A person who is ordinarily called “chief” or “director-general” at a business establishment which is composed of at least two departments, or the head of a group of at least 20 members (including chief and director-general).

2) Division head-level

A person who is ordinarily called “division head” at a business establishment which is composed of at least two divisions, or the head of a group of at least 10 members (including division head).

3) Section head, manager, boss-level

A person who is ordinarily called “section head” or “manager” irrespective of the number of people in the group. In addition, this classification includes “boss”, who leads and supervises a group of production workers as its head (irrespective of the size of the group) in the construction, manufacturing, and other industries irrespective of the position title.