

Release of Results of the Fiscal 2011 Basic Survey of Human Resources Development – Upward Trend in Companies that Emphasize “Education and Training to Raise the Level of Ability of Workers in General” Continues from 2010 –

The Ministry of Health, Labour and Welfare releases lately summarized results of the Fiscal 2011 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, business establishments, and human resources development, 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 7,000 companies are selected for the Company Survey, and 7,000 business establishments are extracted for the Business Establishment Survey. Approximately 20,000 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 1, 2011 to November 4, 2011, and that for the Individual Survey was from October 1, 2011 to November 30, 2011.

In the fiscal 2011 Basic Survey, Iwate Prefecture, Miyagi Prefecture, and Fukushima Prefecture were excluded from the targeted geographical areas based on influence of the Great East Japan Earthquake.

[Key Points of Survey Results]

- 1 Policies for skills development of workers (Company Survey)
 - Regarding entities that determine policies for skills development, more respondents considered that companies, rather than individual workers, should determine such policies both for regular employees and for non-regular employees. Similar trends were also observed in responses for future intentions.
 - Regarding the targets of education and training, more than half of the responding companies emphasized raising the level of ability of workers in general, rather than that of selected workers (regular employees: 56.1%; non-regular employees: 52.1%). Similar trends were observed for future intentions.
 - Many companies emphasized on the job training (OJT) both for regular employees and for non-regular employees.³⁾ This trend remains unchanged since this survey was started. However, the proportion of respondents who would emphasize off the job training (OFF-JT)⁴⁾ in the future relatively increased both for regular employees and for non-regular employees.
- 2 State of implementation of education and training (Business Establishment Survey)
 - Among targeted business establishments, 71.4% implemented OFF-JT for regular employees, up from 67.1% in the previous survey. Although the rate for non-regular employees also increased to 32.9% from 31.4% in the previous survey, it still remained lower than the standard for regular employees.
 - The rate of business establishments that implemented systematic OJT⁵⁾ reached 63.0% for regular employees, the highest ever standard since the survey was started. Although the rate for non-regular employees also increased to 30.8% from 27.7% in the previous survey, it still remained lower than the standard for regular employees.
- 3 Status of participation in education and training of workers (Individual Survey)
 - The ratio of workers who undertook self-development was 43.8% for regular employees

(previous survey: 41.7%) and 19.3% for non-regular employees (previous survey: 18.4%).

- The proportions of workers who thought that they had issues with carrying out self-development were at high levels (80.4% for regular employees and 74.2% for non-regular employees).
- The most common response regarding issues with self-development was “I’m too busy with work and have no time for self-development” for both regular employees (57.3%) and non-regular employees (37.6%), followed by “It costs too much” (regular employees: 33.6%; non-regular employees: 33.2%). Among non-regular employees, a similarly high ratio of 32.5% selected “I’m too busy with family matters and childcare and have no time for self-development”.

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 in the course of daily work
- 4) Education and training that are carried out pursuant to work orders, involving temporary departure from normal work
- 5) Education and training that are carried out in the course of daily work, on a gradual and continuous basis pursuant to education and training plans, etc.

Summary of Survey

1 Policies for skills development of workers (Company Survey)

- Regarding entities that determine policies for skills development, more companies considered that companies, rather than individual workers, should determine such policies. Similarly, more respondents selected companies for determination in the future.
- Regarding the targets of education and training, more companies emphasized raising the level of ability of workers in general, rather than that of selected workers. The ratio of such companies also increased from the previous year. Similarly, more companies would emphasize raising the level of ability of workers in general in the future.
- Many companies emphasized OJT, rather than OFF-JT, as methods for education and training. The ratio of such implementation also increased slightly from the previous year. However, the proportion of companies that would emphasize OFF-JT would relatively increase in the future.

(1) “Determination by companies” or “determination by individual workers”? (Figures 1 and 2)

Among targeted companies, 74.5% thought that they should determine or mainly determine policies for skills development for regular employees (previous survey: 75.2%). The ratio remained unchanged from the previous year, though still at a high level. Companies who responded that individual workers should determine or mainly determine policies for skills development made up 25.5% (previous survey: 24.8%).

On the other hand, 63.2% of responding companies thought that they should determine or mainly determine policies for skills development for non-regular employees, slightly up from 60.5% in the previous survey. Companies who responded that individual workers should determine or mainly determine policies for skills development made up 36.7% (previous survey: 39.4%). For non-regular employees, fewer companies thought that they should 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 (78.7%) and non-regular employees (65.4%).

Figure 1 Entities that determine policies for skills development of regular employees

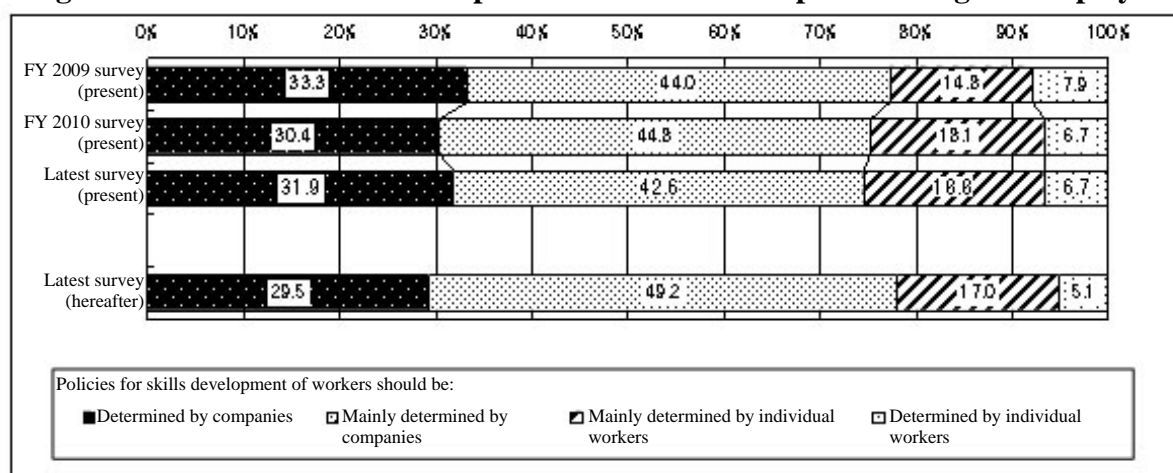
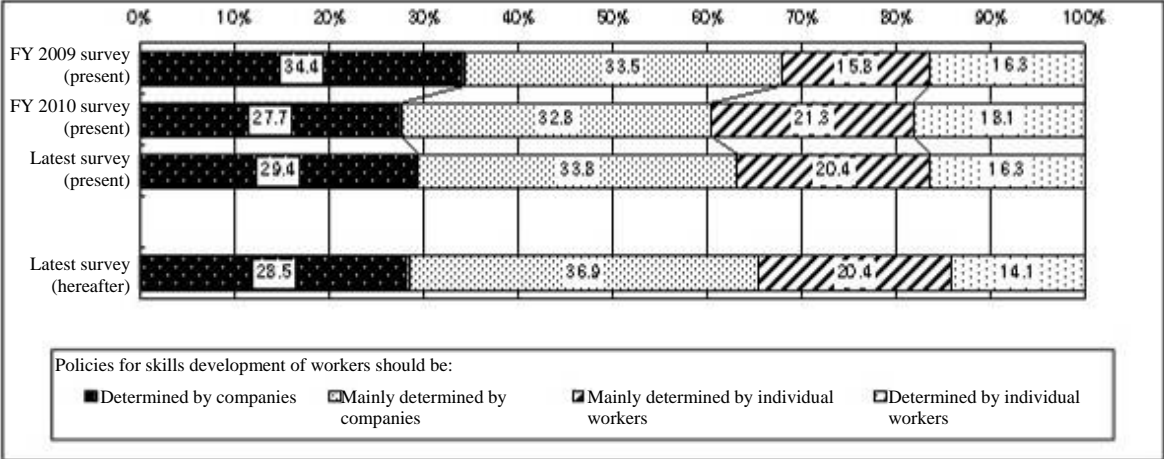


Figure 2 Entities that determine policies for skills development of non-regular employees



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

Regarding the emphasized targets of education and training for regular employees, 56.1% (previous survey: 53.2%) 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 43.9% (previous survey: 46.9%).

On the other hand, for non-regular employees, 52.1% (previous survey: 49.9%) of companies emphasized or mainly emphasized “education and training for workers in general”, and 48.0% (previous survey: 50.1%) 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”. In particular, for non-regular employees, the share for “workers in general” exceeded the share of “selected workers” for the first time since the 2006 survey.

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 63.0% for regular employees and 56.0% for non-regular employees.

Figure 3 Emphasized targets of education and training for regular employees

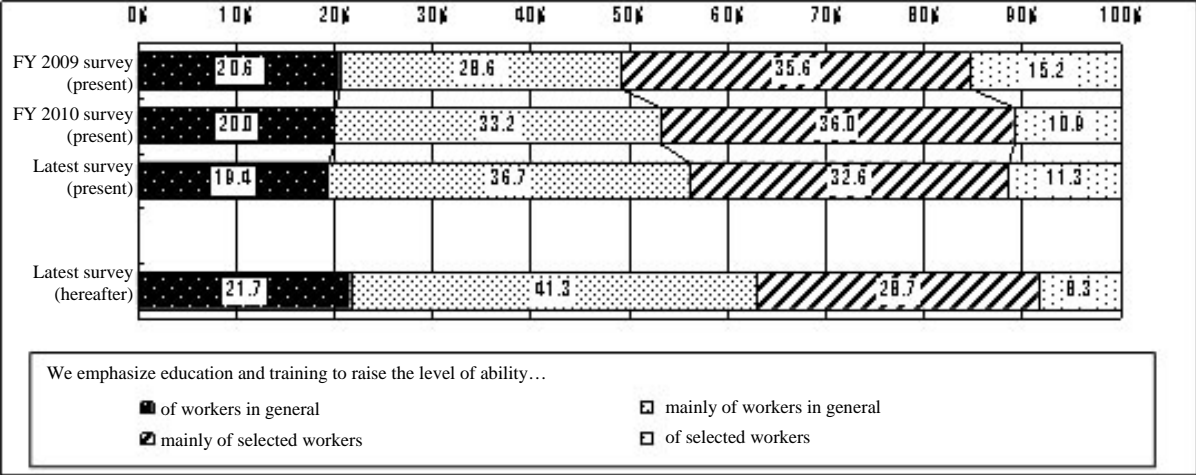
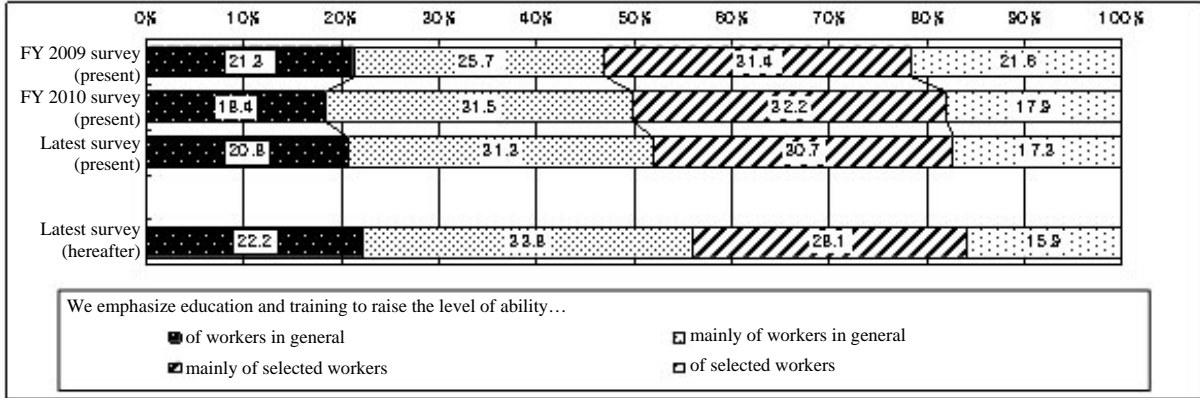


Figure 4 Emphasized targets of education and training for non-regular employees



(3) “OJT” or “OFF-JT”? (Figures 5 and 6)

Regarding emphasized methods for education and training for regular employees, 76.4% (previous survey: 74.0%) of companies emphasized or mainly emphasized “OJT”, and 23.5% (previous survey: 26.0%) emphasized or mainly emphasized “OFF-JT”.

On the other hand, for non-regular employees, 79.1% (previous survey: 78.8%) of companies emphasized or mainly emphasized “OJT”.

In comparison to the previous survey, there has been a slight increase in companies that emphasize or mainly emphasize “OJT” 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-JT” will slightly increase from the current state. These proportions were 29.5% for regular employees and 23.4% for non-regular employees.

Figure 5 Emphasized method for education and training for regular employees

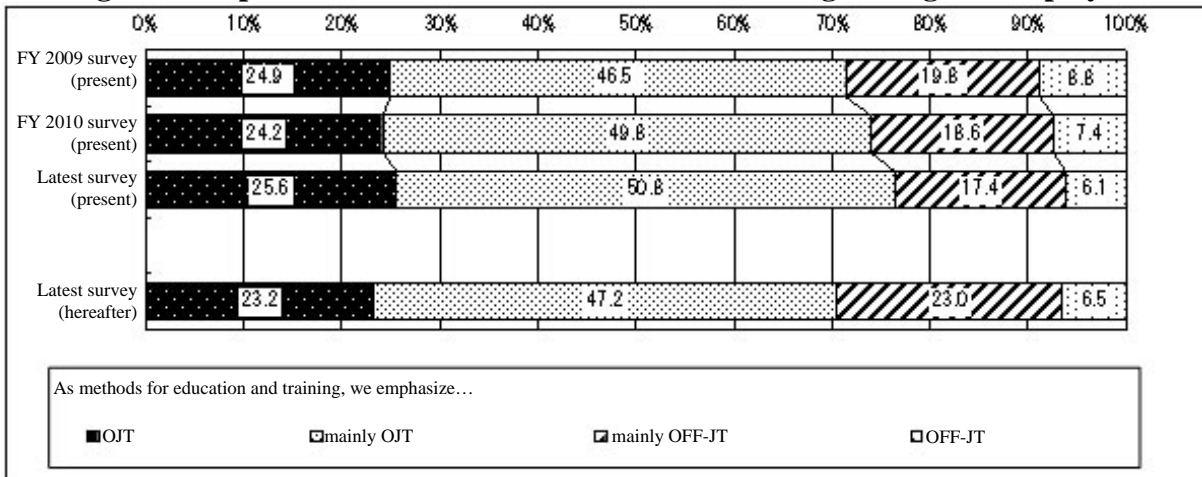
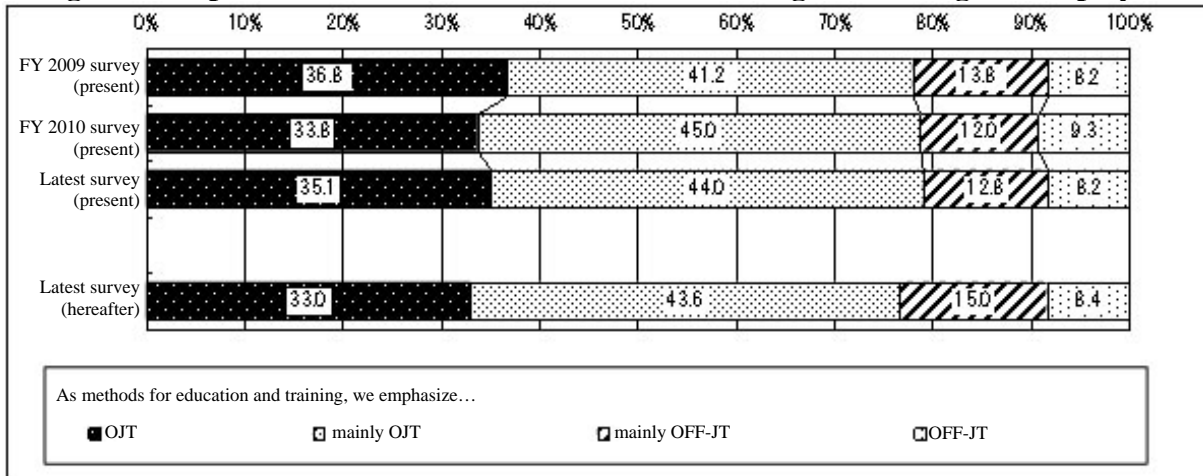


Figure 6 Emphasized method for education and training for non-regular employees



2 State of implementation of education and training over a one-year period in fiscal 2010 (Business Establishment Survey and Company Survey)

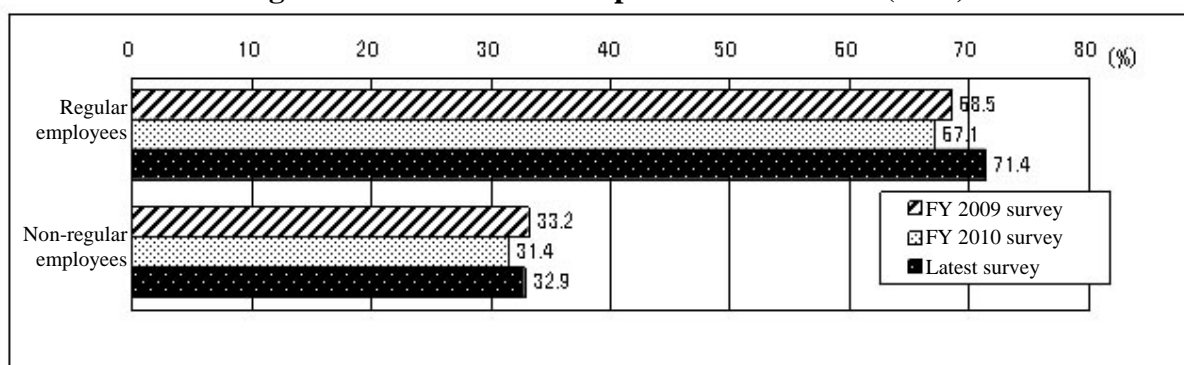
- The proportion of businesses that implemented OFF-JT increased from the previous year both for regular employees and for non-regular employees. In particular, the figure for regular employees rose by more than 4 points from the previous year.
- The proportion of businesses that implemented systematic OJT also increased from the previous year both for regular employees and for non-regular employees. The figure for regular employees rose by more than 5 points, and that for non-regular employees rose by more than 3 points.
- The average expenditures per worker for OFF-JT and for support for self-development respectively slightly increased from the previous year.

(1) OFF-JT

1) State of implementation (Figures 7 and 8)

About 71.4% (previous survey: 67.1%) of businesses implemented OFF-JT for regular employees in fiscal 2010. On the other hand, for non-regular employees, about 32.9% (previous survey: 31.4%) of businesses implemented OFF-JT, representing a lower level than for regular employees.

Figure 7 Businesses that implemented OFF-JT (total)

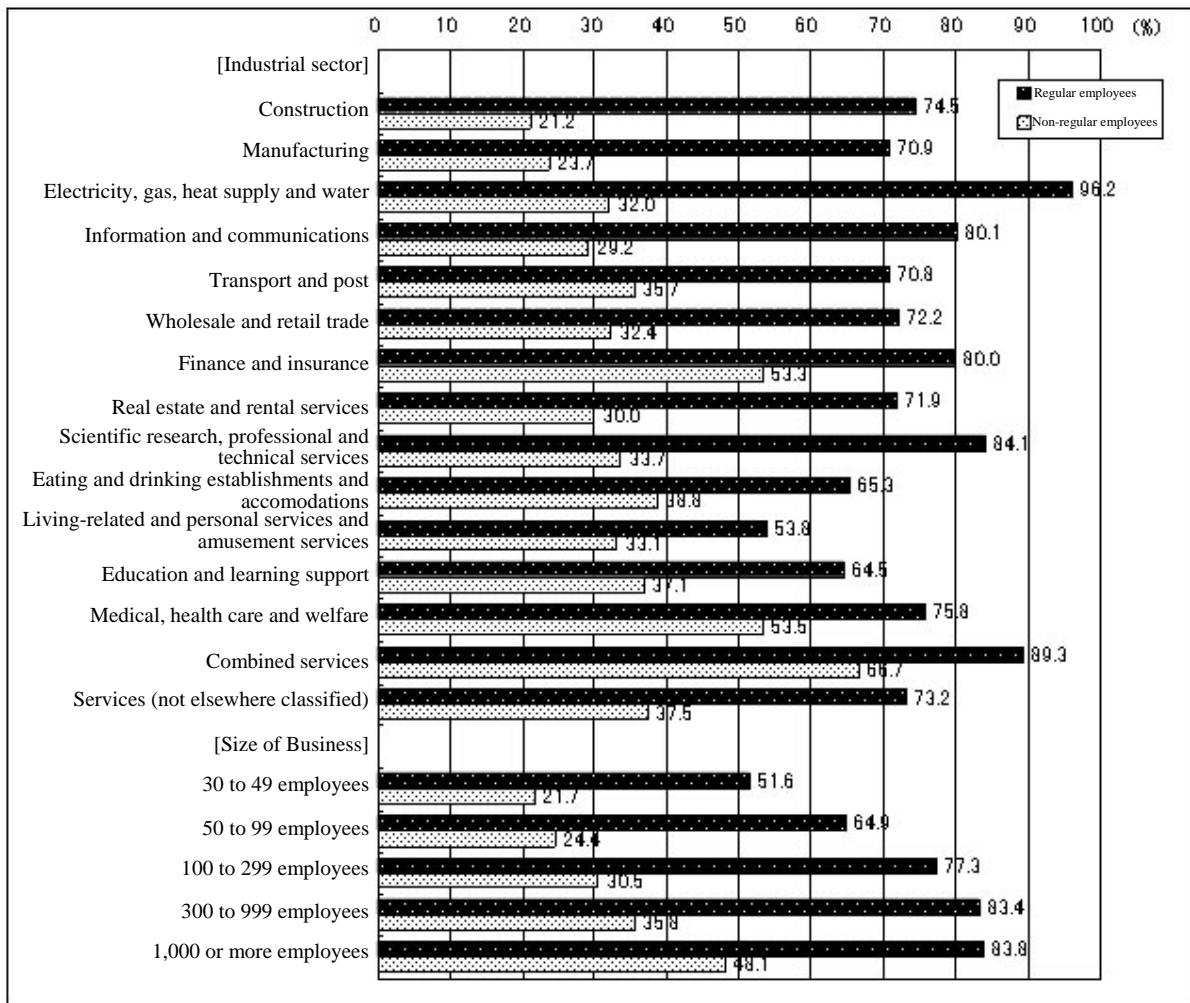


2) The situation by industrial sector and size of business

Regarding the breakdown by industry of businesses which implemented OFF-JT of regular employees in fiscal 2010, the proportions were as follows: high in Electricity, gas, heat supply and water (96.2%), Combined services (89.3%), Scientific research, professional and technical services (84.1%) and so on, while low in Living-related and personal services and amusement services (53.8%), Education and learning support (64.5%), and Eating and drinking establishments and accommodations (65.3%). 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, regarding the breakdown by industry of businesses which implemented OFF-JT of non-regular employees, the proportions were as follows: high in Combined services (66.7%), Medical, health care and welfare (53.5%), and Finance and insurance (53.3%), while low in Construction (21.2%) and Manufacturing (23.7%). Categorized by size of the business, there is a tendency towards a higher proportion of larger businesses implementing OFF-JT.

**Figure 8 Businesses that implemented OFF-JT
(categorized by industrial sector and size of business)**

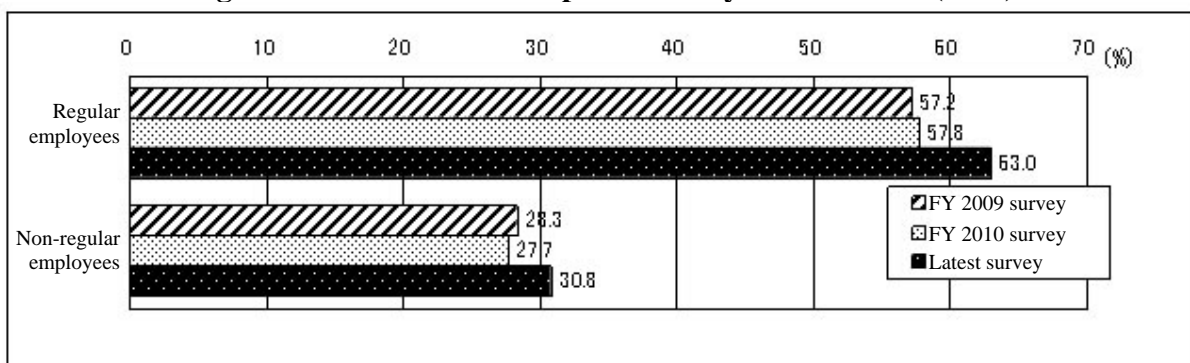


(2) Systematic OJT (Figures 9 and 10)

1) State of implementation

About 63.0% (previous survey: 57.8%) of businesses implemented systematic OJT of regular employees in fiscal 2010. This was the highest ever standard since the survey was started. On the other hand, about 30.8% (previous survey: 27.7%) of businesses implemented systematic OJT of non-regular employees, which represents a lower level than for regular employees.

Figure 9 Businesses that implemented systematic OJT (total)

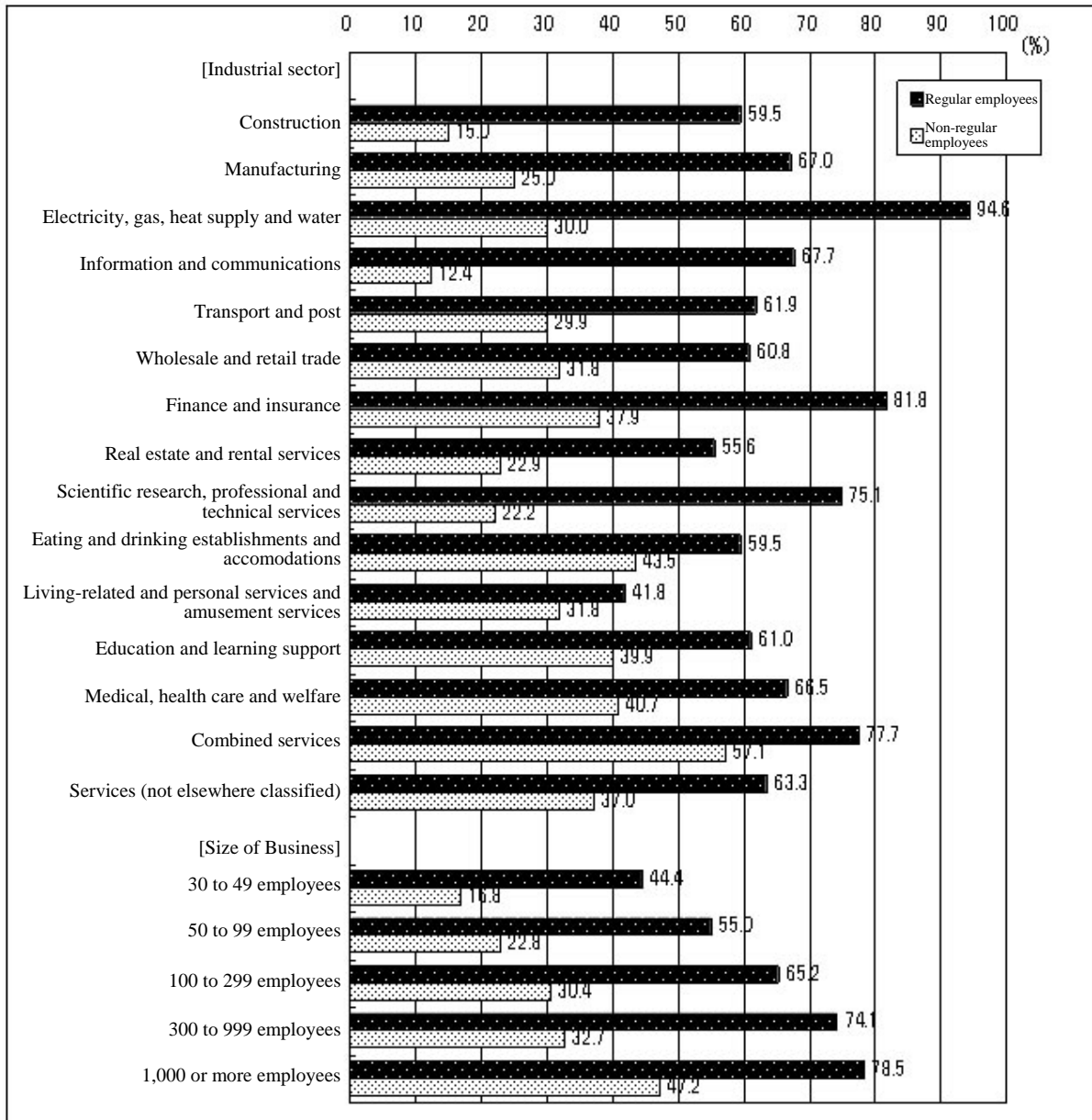


2) Situation by industrial sector and size of business

Regarding the breakdown by industry of businesses which implemented systematic OJT of regular employees in fiscal 2010, the proportions were as follows: high in Electricity, gas, heat supply and water (94.6%), Finance and insurance (81.8%) and so on, whereas low in Living-related and personal services and amusement services (41.8%). Categorized by size of the business, more systematic OJT was provided 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, and in the 70% range at businesses with 300 or more employees.

Regarding the breakdown by industry of businesses which implemented systematic OJT of non-regular employees, the proportions were as follows: high in Combined services (57.1%), Eating and drinking establishments and accommodations (43.5%), Medical, health care and welfare (40.7%) and so on, whereas low in Information and communications (12.4%), Construction (15.0%), etc. Categorized by size of the business, there is a tendency towards a higher proportion of larger businesses implementing systematic OJT.

**Figure 10 Businesses that implemented systematic OJT
(categorized by industrial sector and size of business)**

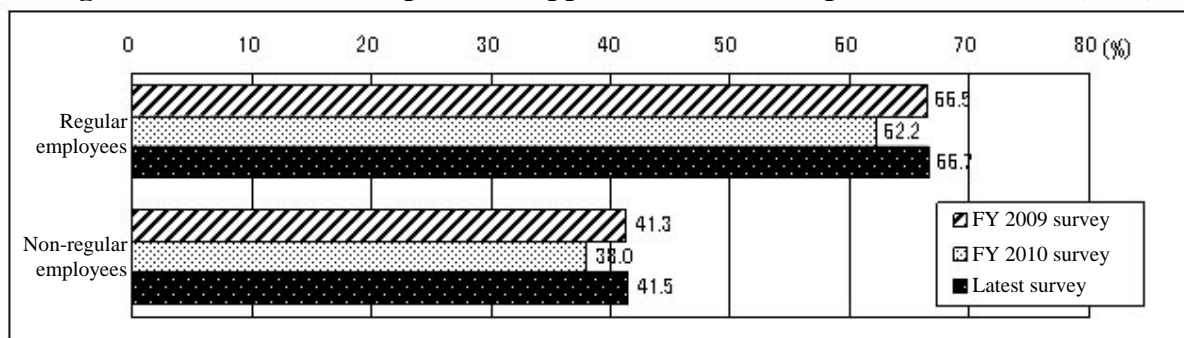


(3) Support for self-development (Figures 11, 12 and 13)

1) State of implementation

Among responding businesses, 66.7% (previous survey: 62.2%) selected “We provide support” for self-development of regular employees. On the other hand, 41.5% (previous survey: 38.0%) of businesses responded “We provide support” for self-development of non-regular employees.

Figure 11 Businesses that provide support for self-development of workers (total)

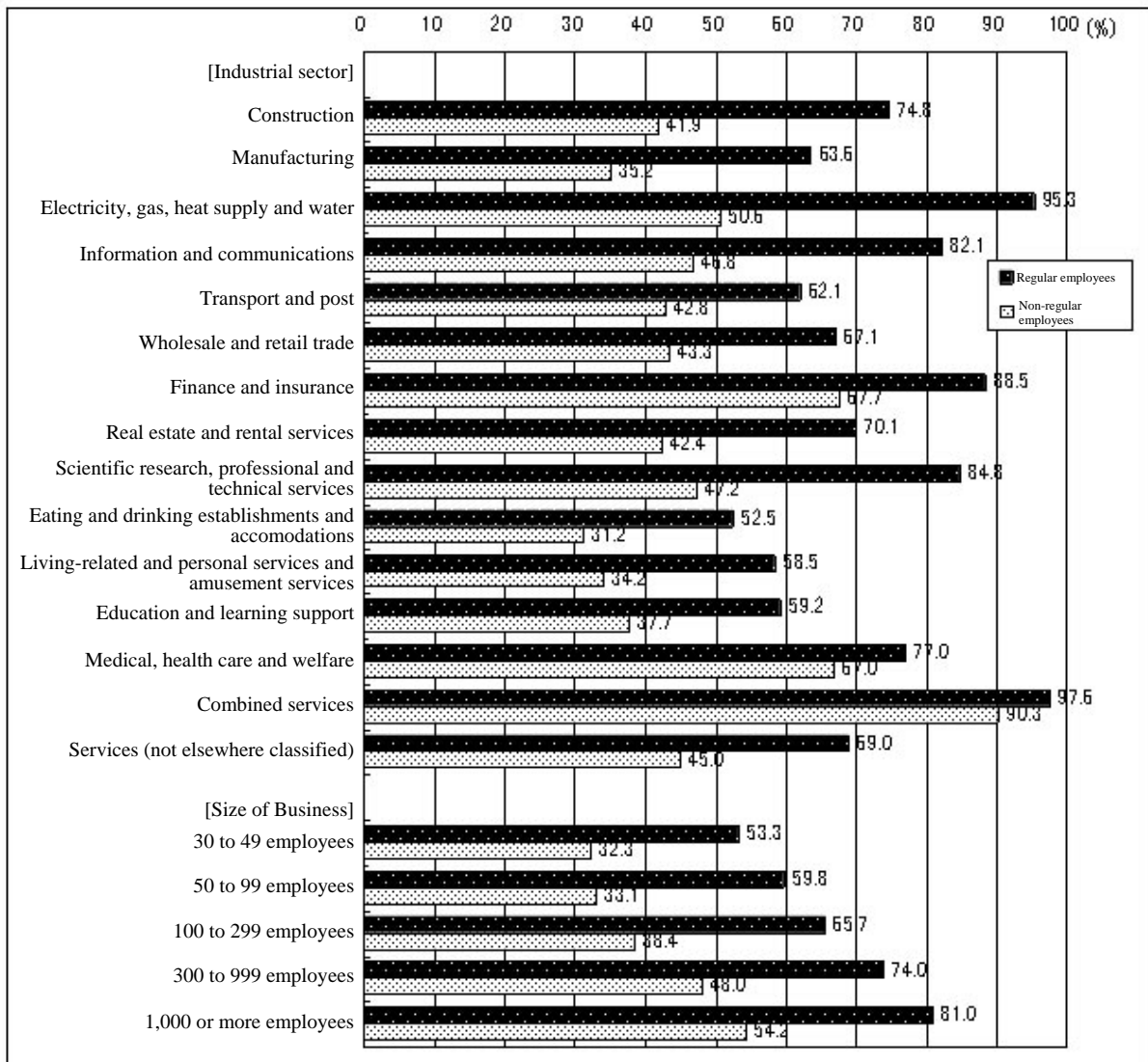


2) Situation by industrial sector and size of business

Regarding the breakdown by industry of businesses which responded “We provide support” for the self-development of regular employees, the proportions were as follows: high in Combined services (97.6%), Electricity, gas, heat supply and water (95.3%), Finance and insurance (88.5%) and so on, whereas low in Eating and drinking establishments and accommodations (52.5%), Living-related and personal services and amusement services (58.5%), Education and learning support (59.2%), 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 100 or more employees, in the 60% range at businesses with 100 to 299 employees, and in the 70% range at businesses with 300 to 999 employees, and in the 80% range at businesses with 1,000 or more employees.

On the other hand, regarding the breakdown by industry of businesses which responded “We provide support” for the self-development of non-regular employees, the proportions were as follows: high in Combined services (90.3%), Finance and insurance (67.7%), and Medical, health care and welfare (67.0%), whereas low in Eating and drinking establishments and accommodations (31.2%), Living-related and personal services and amusement services (34.2%), Manufacturing (35.2%), and Education and learning support (37.7%). 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 12 Businesses that provide support for self-development of workers
(categorized by industrial sector and size of business)**

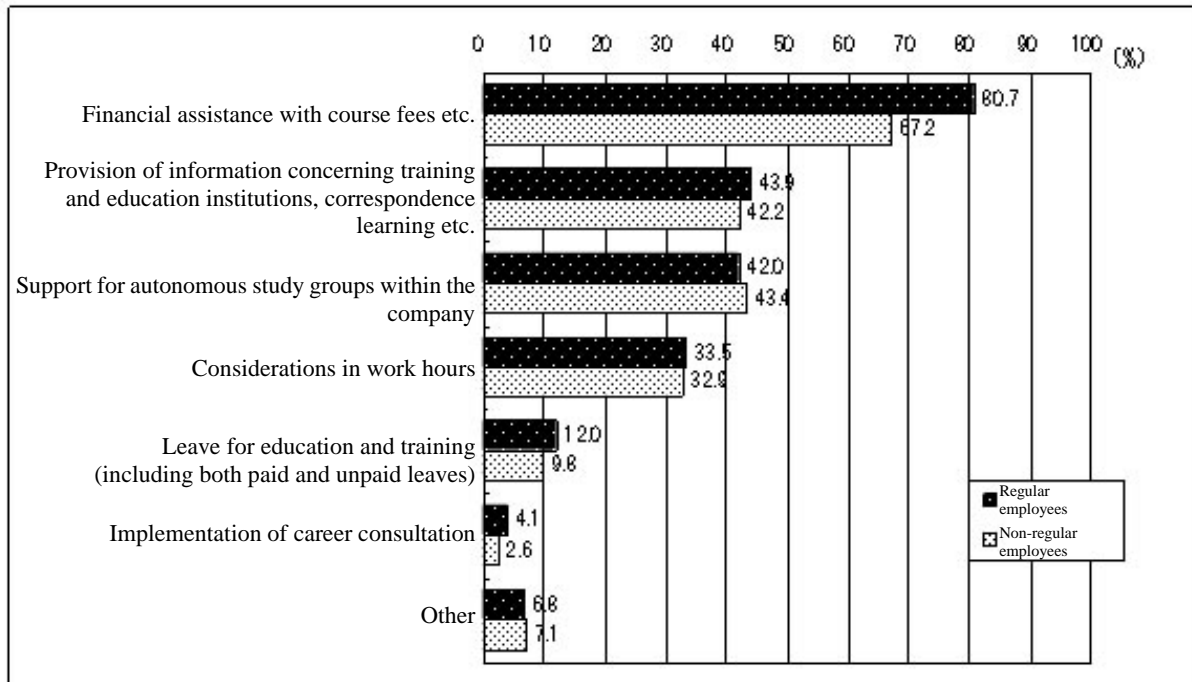


3) Nature of the support

Regarding the breakdown of nature of support for the self-development of regular employees (multiple answers allowed), the ratio of “Financial assistance with course fees etc.” was the highest at 80.7% (previous survey: 82.9%), followed by “Provision of information concerning training and education institutions, correspondence learning etc.” at 43.9% (previous survey: 45.4%), and “Support for autonomous study groups within the company” at 42.0% (previous survey: 41.2%).

On the other hand, 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 67.2% (previous survey: 70.5%), followed by “Support for autonomous study groups within the company” at 43.4% (previous survey: 41.9%) and “Provision of information concerning training and education institutions, correspondence learning etc.” at 42.2% (previous survey: 42.1%).

Figure 13 Nature of support for self-development of workers (multiple answers allowed)



(4) Expenditure for OFF-JT and support for self-development (Figures 14 and 15)

1) Average expenditure per worker

The average expenditure per worker for education and training (the average amount spent by expending companies) slightly increased from the previous survey both for OFF-JT to 15,000 yen (previous survey: 13,000 yen) and for support for self-development to 6,000 yen (previous survey: 4,000 yen).

Figure 14 Average expenditure per worker for OFF-JT

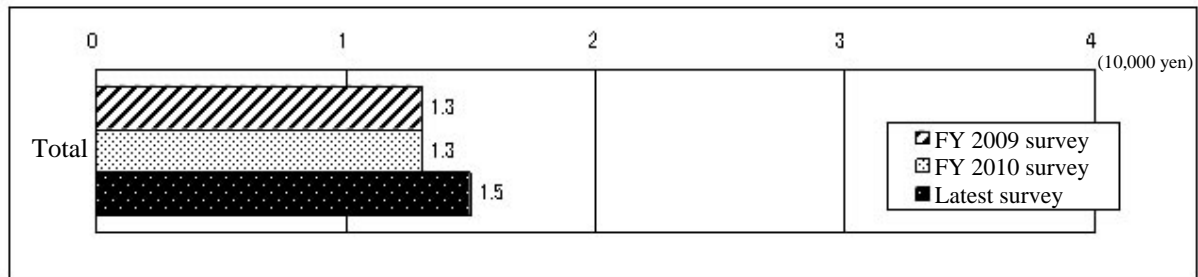
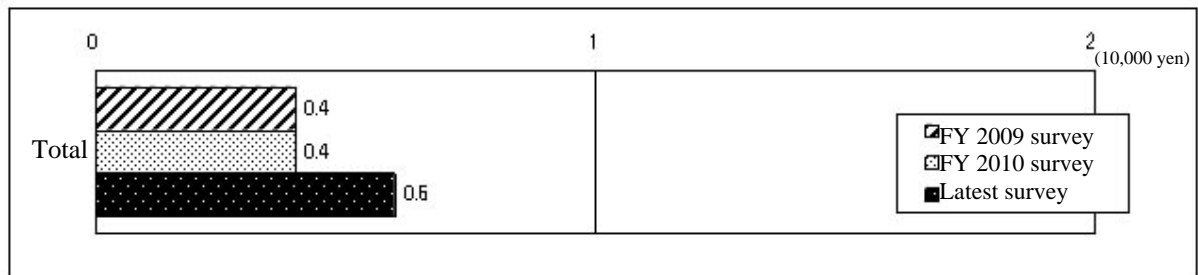


Figure 15 Average expenditure per worker for support for self-development



3. Status of participation in education and training of workers over a one-year period in fiscal 2010 (Individual Survey)

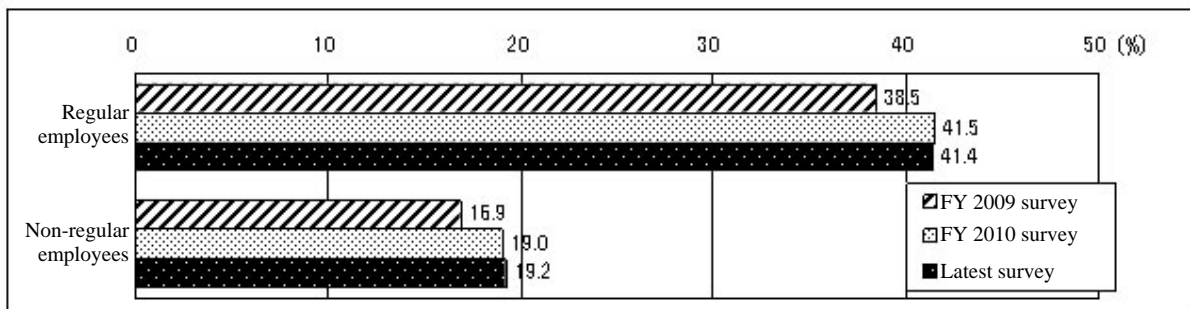
- Workers who undertook self-development slightly increased from the previous year for regular employees, and remained at the same level for non-regular employees.
- The proportions of workers who thought that they had issues with carrying out self-development remained at the same high levels both for regular employees and for non-regular employees.
- Regarding issues with self-development, the responses “I’m too busy with work and have no time for self-development” was the most common both for regular employees and for non-regular employees, followed by “It costs too much”. In comparison with regular employees, more non-regular employees complained, “I’m too busy with family matters and childcare and have no time for self-development”, “I don’t know what sort of course is appropriate for the career I’m aiming for”, and so on, representing a different trend from regular employees.

(1) OFF-JT (Figures 16 and 17)

1) State of participation

The ratio of workers who participated in OFF-JT in fiscal 2010 was 41.4% (previous survey: 41.5%) of regular employees and 19.2% (previous survey: 19.0%) of non-regular employees.

Figure 16 Workers who participated in OFF-JT (total)

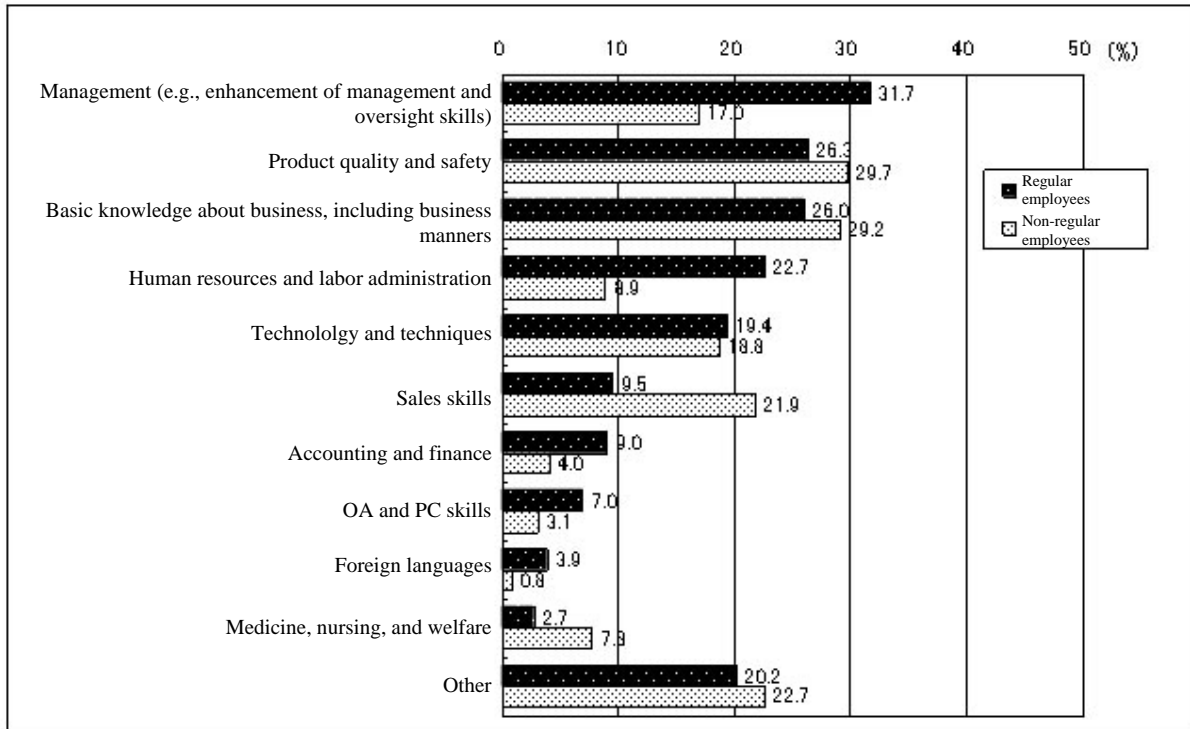


2) Nature of the OFF-JT

Concerning the nature of OFF-JT attended (multiple answers allowed), the ratio of regular employees who responded “Management (e.g., enhancement of management and oversight skills)” was the highest at 31.7% (previous survey: 34.7%), followed by “Product quality and safety” at 26.3% (previous survey: 24.6%), “Basic knowledge about business, including business manners” at 26.0% (previous survey: 24.4%), “Human resources and labor” at 22.7% (previous survey: 21.3%), and “Technology and techniques” at 19.4% (previous survey: 21.7%).

On the other hand, for non-regular employees, the ratio for “Product quality and safety” (29.7% [previous survey: 27.7%]) and “Basic knowledge about business, including business manners” (29.2% [previous survey: 26.8%]) were high, followed by “Sales skills” (21.9% [previous survey: 14.4%]) and “Technology and techniques” (18.8% [previous survey: 21.3%]).

Figure 17 Nature of OFF-JT attended (multiple answers allowed)

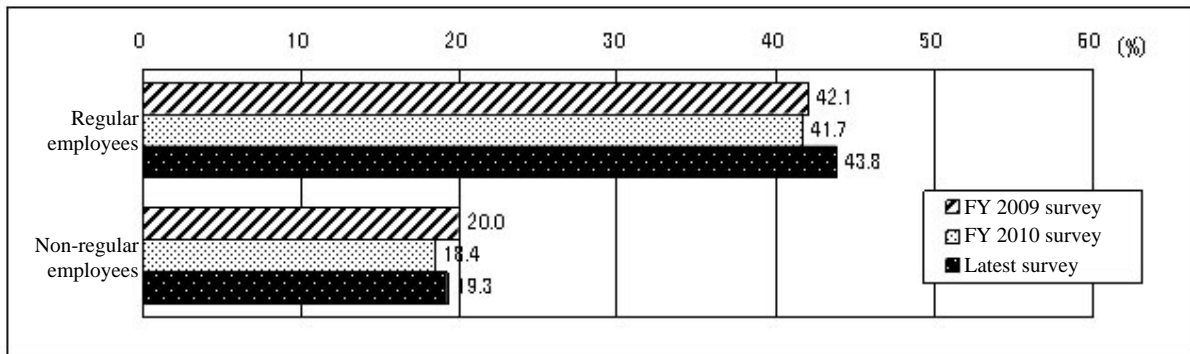


(2) Self-development (Figures 18, 19, 20 and 21)

1) State of implementation

The ratio of workers who undertook self-development in fiscal 2010 was 43.8% (previous survey: 41.7%) of regular employees and 19.3% (previous survey: 18.4%) of non-regular employees. The ratio of workers who undertook self-development slightly increased from the previous fiscal year for regular employees and remained at the same level for non-regular employees.

Figure 18 Workers who undertook self-development

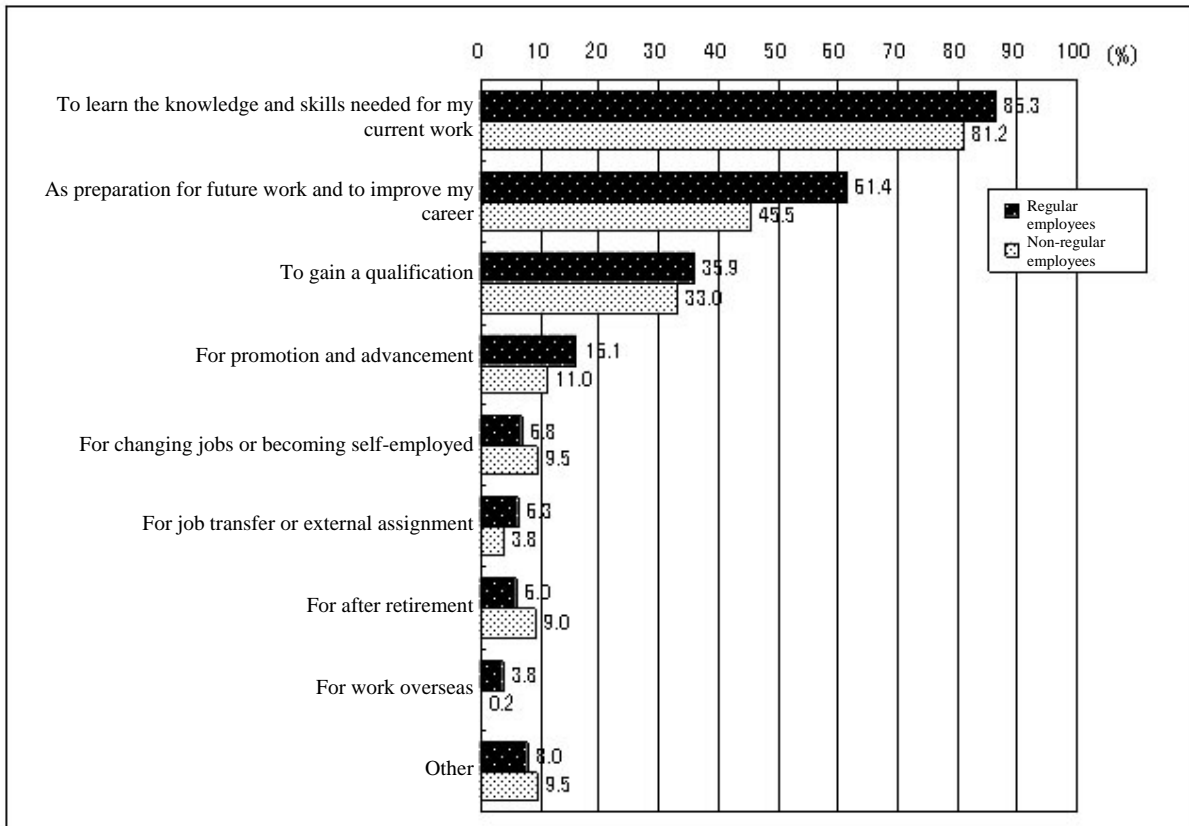


2) Reasons for undertaking self-development

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: 85.1%), followed by “As preparation for future work and to improve my career” at 61.4% (previous survey: 57.4%), and “To gain a qualification” at 35.9% (previous survey: 33.4%). There was a similar trend for non-regular employees, with “To learn the knowledge and skills needed for my current work” particularly high at 81.2% (previous survey: 78.4%), “As preparation

for future work and to improve my career” at 45.5% (previous survey: 43.2%), and “To gain a qualification” at 33.0% (previous survey: 27.7%).

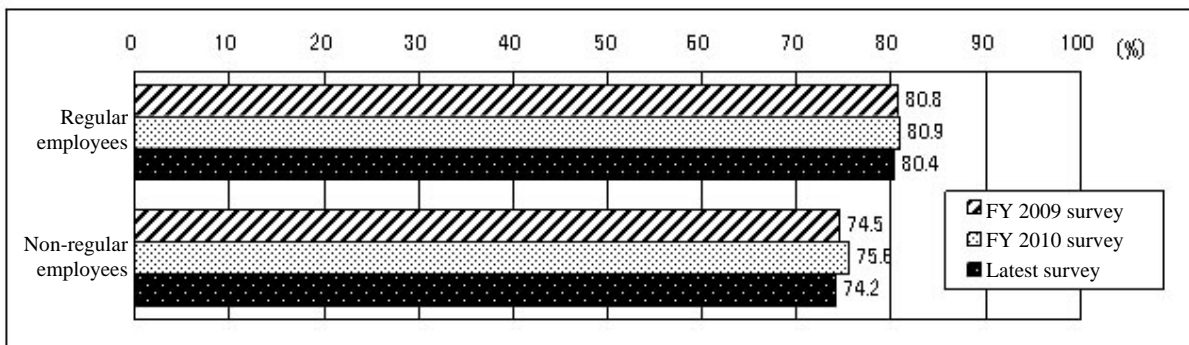
Figure 19 Reasons for undertaking self-development (multiple answers allowed)



3) Existence or non-existence of issues with self-development

The ratio of workers who responded that there were issues with self-development was 80.4% (previous survey: 80.9%) of regular employees and 74.2% (previous survey: 75.6%) of non-regular employees.

Figure 20 Workers who responded that there were issues with self-development



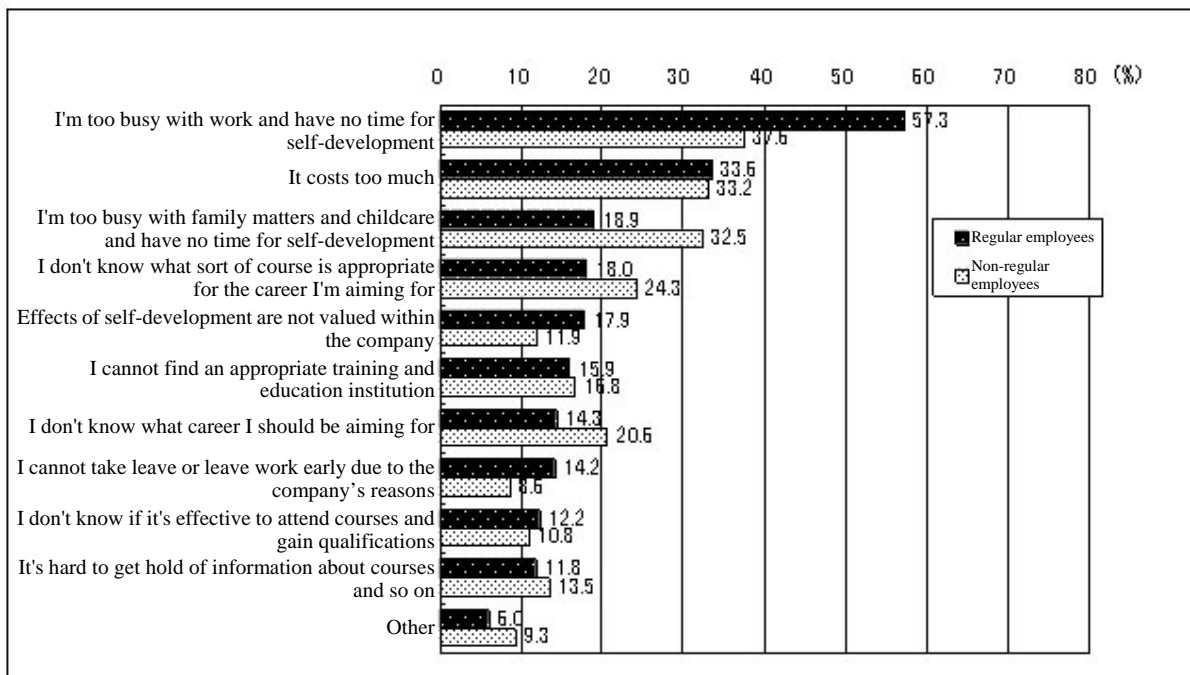
4) Nature of the issues with self-development

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 57.3% (previous survey: 56.1%), followed by “It costs too much” at 33.6% (previous survey: 36.5%). These were further followed by “I’m too busy with family matters and childcare and have no time for self-development” (18.9% [previous

survey: 18.1%]), “I don’t know what sort of course is appropriate for the career I’m aiming for” (18.0% [previous survey: 18.0%]) 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 37.6% (previous survey: 36.1%), 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: 30.7%]), “I don’t know what sort of course is appropriate for the career I’m aiming for” (24.3% [previous survey: 18.7%]), and “I don’t know what career I should be aiming for” (20.6% [previous survey: 18.6%]).

Figure 21 Issues of self-development among workers who responded that there were issues with self-development (multiple answers allowed)



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 increased both for OFF-JT to 15,000 yen (fiscal 2010 survey [hereafter “previous survey”]: 13,000 yen) and for support for self-development to 6,000 yen (previous survey: 4,000 yen).

Figure 1 Average expenditure per worker for OFF-JT

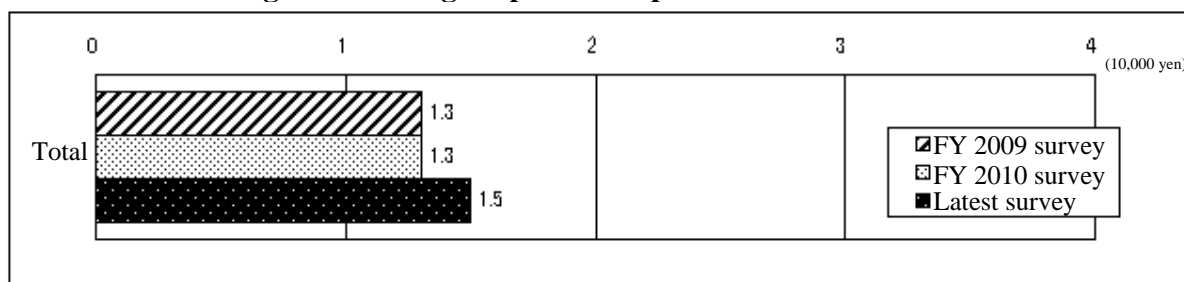
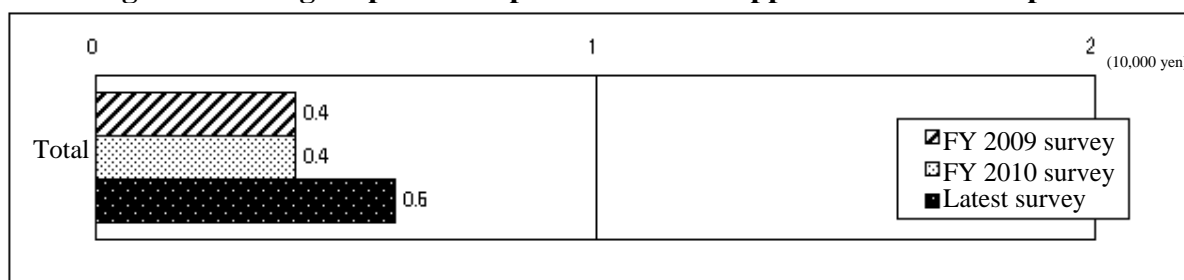


Figure 2 Average expenditure per worker for support for self-development



(2) Policies for skills development of workers

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

Among targeted companies, 74.5% thought that they should determine or mainly determine policies for skills development for regular employees (previous survey: 75.2%). The ratio remained roughly unchanged from the previous year, though still at a high level. Companies who responded that individual workers should determine or mainly determine policies for skills development made up 25.5% (previous survey: 24.8%).

On the other hand, 63.2% of responding companies thought that they should determine or mainly determine policies for skills development for non-regular employees, slightly up from 60.5% in the previous survey. Companies who responded that individual workers should determine or mainly determine policies for skills development made up 36.7% (previous survey: 39.4%). 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 (78.7%) and non-regular employees (65.4%).

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

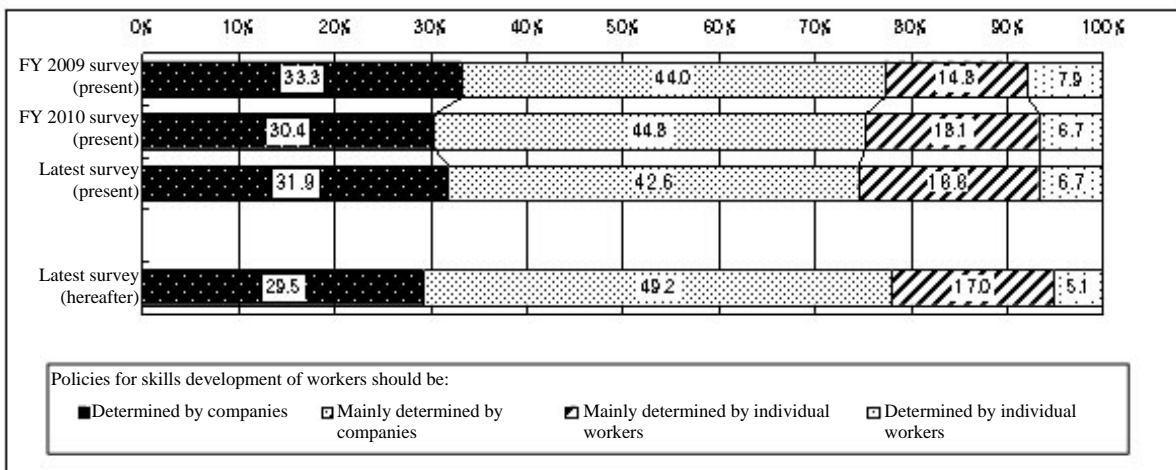
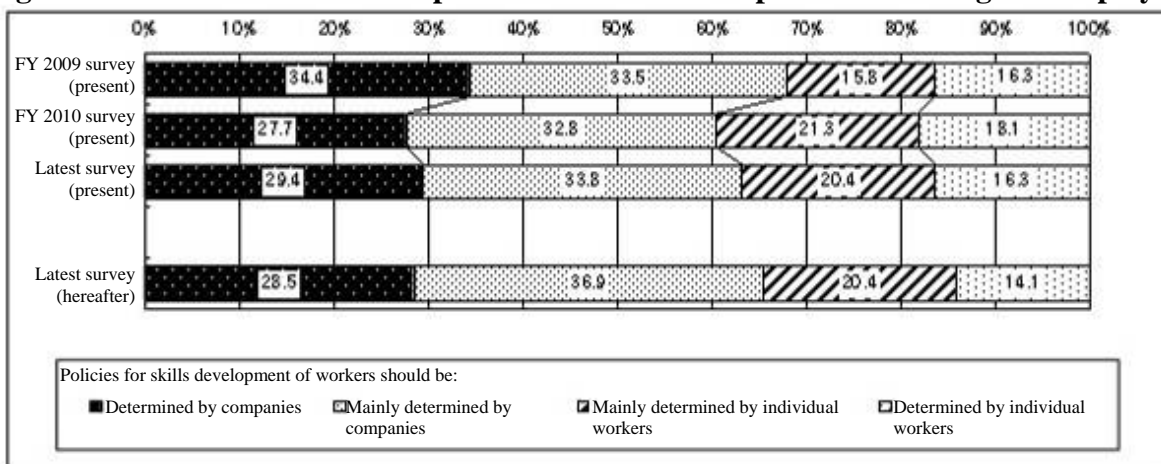


Figure 4 Entities that determine policies for skills development of non-regular employees



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, 56.1% (previous survey: 53.2%) 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 43.9% (previous survey: 46.9%).

On the other hand, for non-regular employees, 52.1% (previous survey: 49.9%) of companies emphasized or mainly emphasized “education and training for workers in general”, and 48.0% (previous survey: 50.1%) 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”. In particular, for non-regular employees, the share for “workers in general” exceeded the share of “selected workers” for the first time since the 2006 survey.

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 63.0% for regular employees and 56.0% for non-regular employees.

Figure 5 Emphasized targets of education and training for regular employees

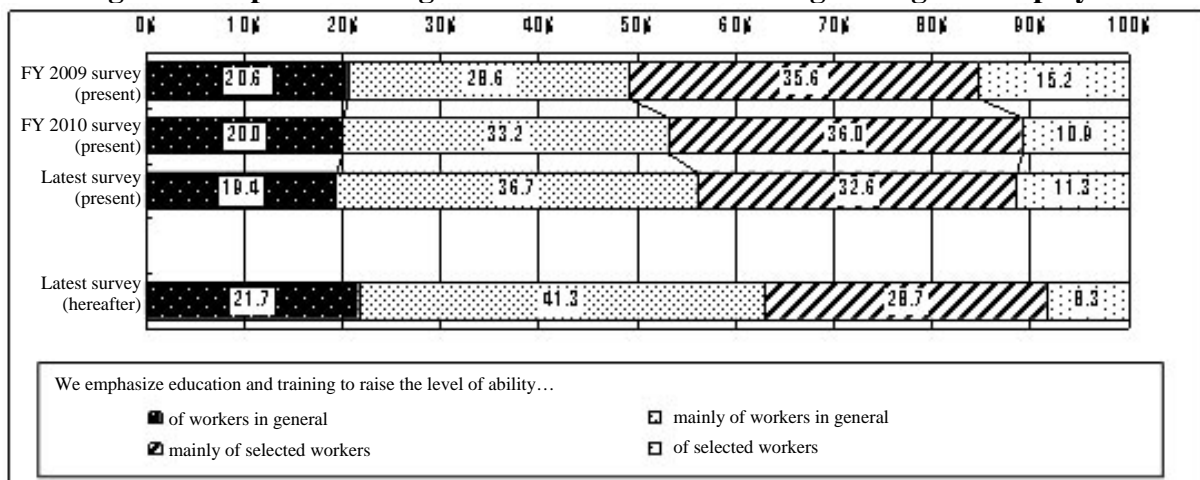
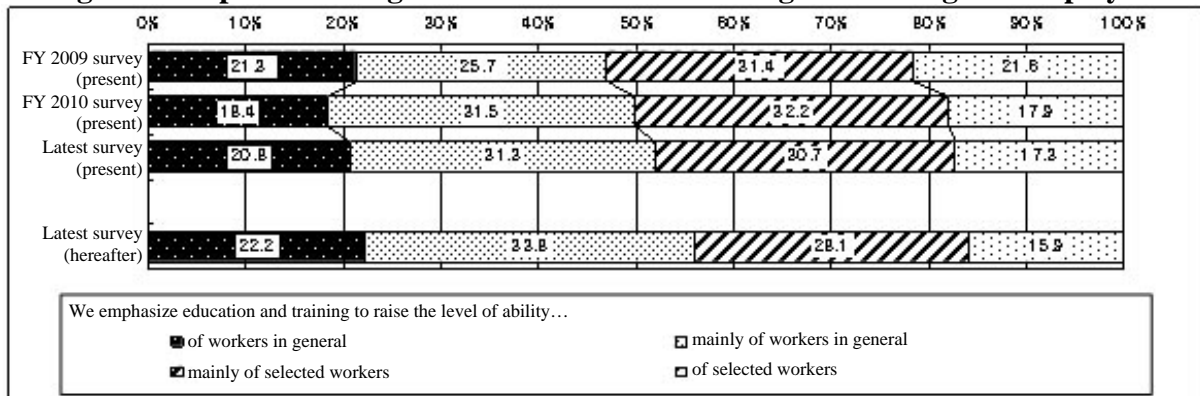


Figure 6 Emphasized targets of education and training for non-regular employees



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

Regarding emphasized methods for education and training for regular employees, 76.4% (previous survey: 74.0%) of companies emphasized or mainly emphasized “OJT”, and 23.5% (previous survey: 26.0%) emphasized or mainly emphasized “OFF-JT”.

On the other hand, for non-regular employees, 79.1% (previous survey: 78.8%) of companies emphasized or mainly emphasized “OJT”.

In comparison to the previous survey, there has been a slight increase in companies that emphasize or mainly emphasize “OJT” for regular employees, but the proportion has remained roughly 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-JT” will slightly increase from the current state. These proportions were 29.5% for regular employees and 23.4% for non-regular employees.

Figure 7 Emphasized method for education and training for regular employees

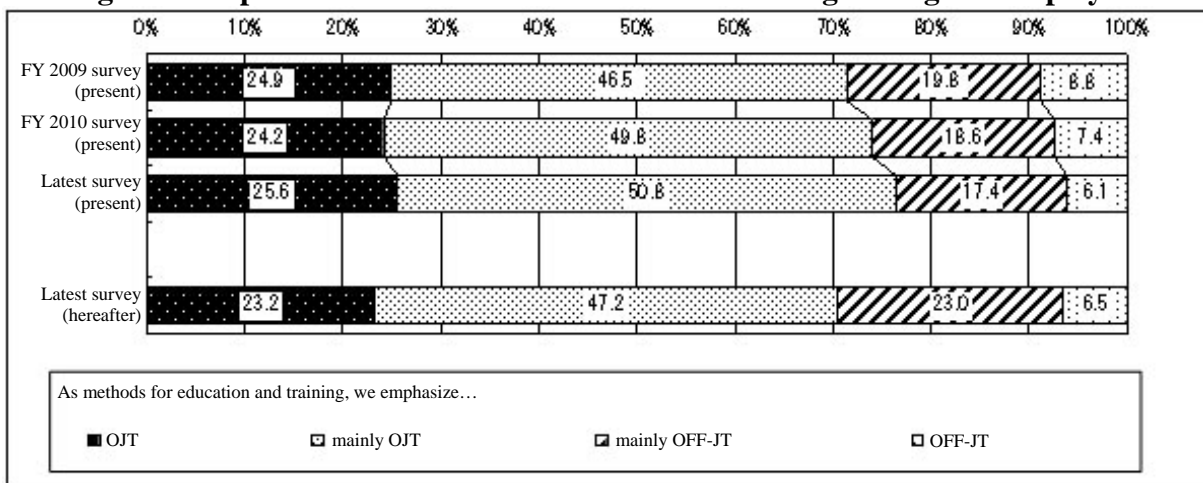
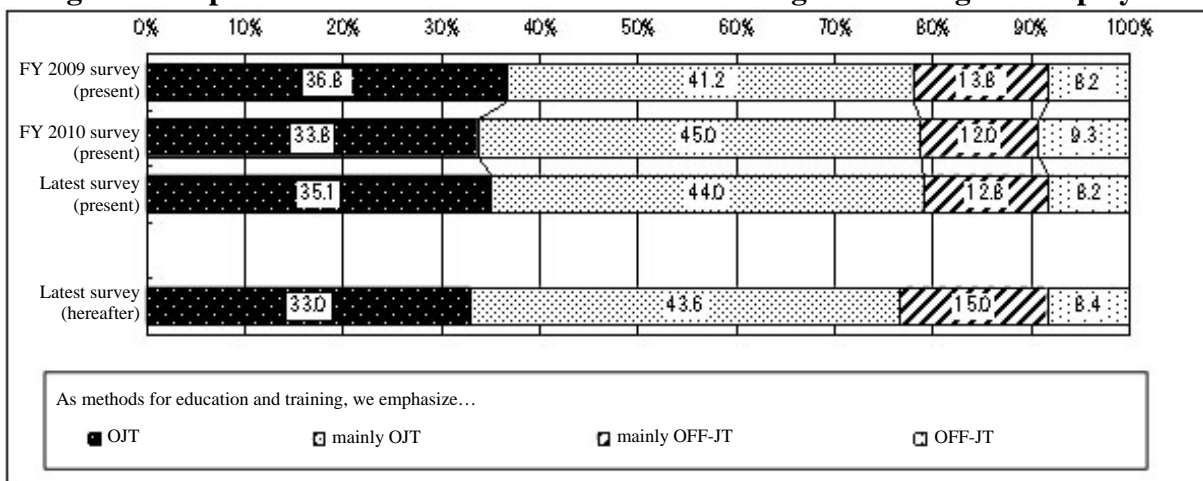


Figure 8 Emphasized method for education and training for non-regular employees



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

Regarding methods for education and training of regular employees, 38.6% (previous survey: 40.3%) of companies emphasized or mainly emphasized “outsourcing”, and 61.4% (previous survey: 59.7%) emphasized or mainly emphasized “in-house”.

On the other hand, for non-regular employees, 24.4% (previous survey: 23.4%) of companies emphasized or mainly emphasized “outsourcing”, and 75.6% (previous survey: 76.6%) 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, there has been a slight decrease of companies that emphasized or mainly emphasized “outsourcing” for regular employees, while the proportion of those companies has remained roughly unchanged 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

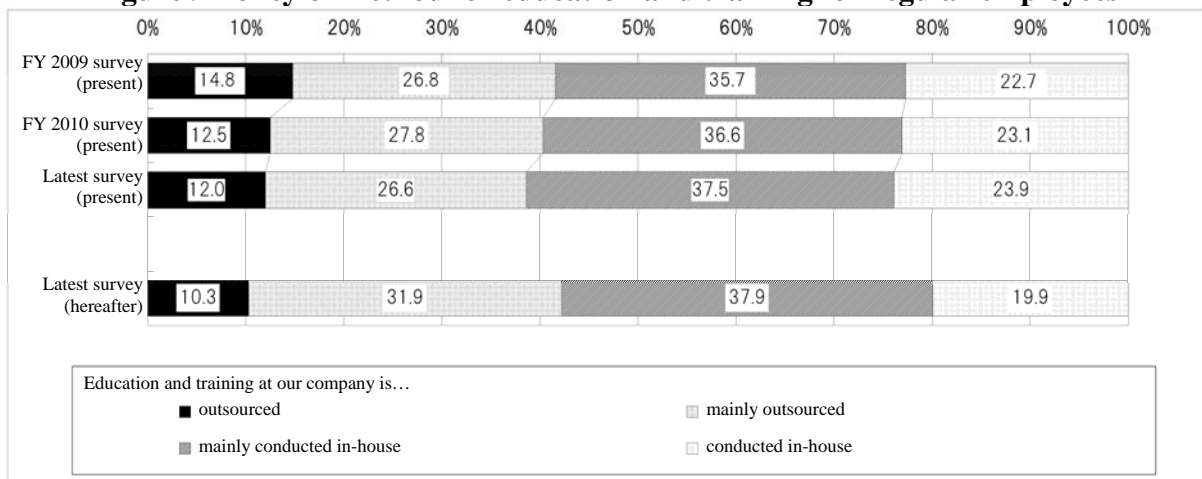
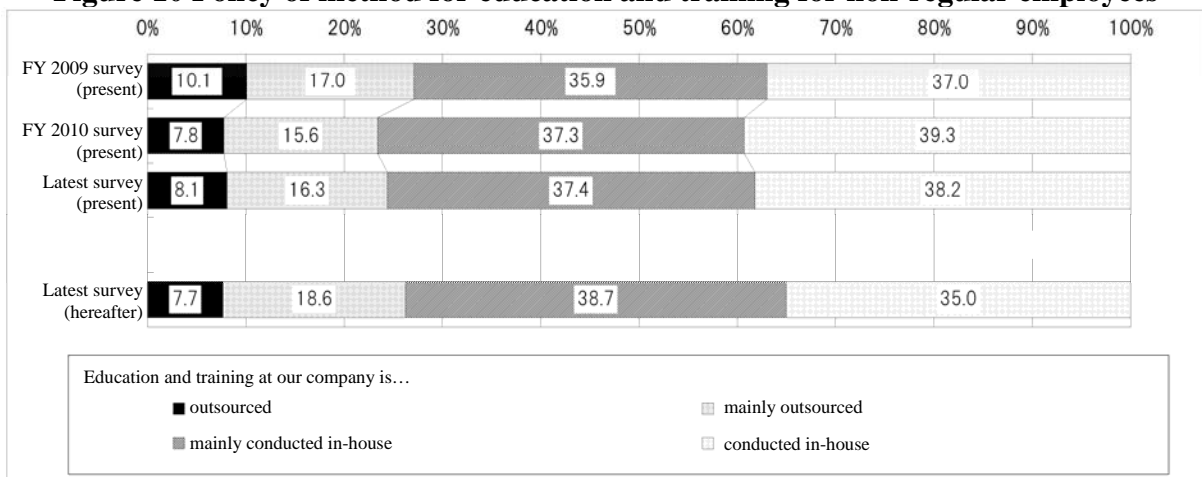


Figure 10 Policy of method for education and training for non-regular employees



(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 2008-fiscal 2010), 36.4% of companies responded “no change”, and 19.3% of companies responded “increasing trend”. Regarding costs for support for self-development, 30.7% of companies responded “no change”, and 13.4% 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 30.4% for costs for OFF-JT and 25.4% for costs for support for self-development.

On the other hand, regarding costs for OFF-JT of non-regular employees during the past three years, 55.1% of companies responded “no track record”, and 7.4% of companies responded “increasing trend”. Regarding costs for support for self-development, 62.1% of companies responded “no track record”, and 6.4% 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 15.8% for costs for OFF-JT and 14.2% 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)

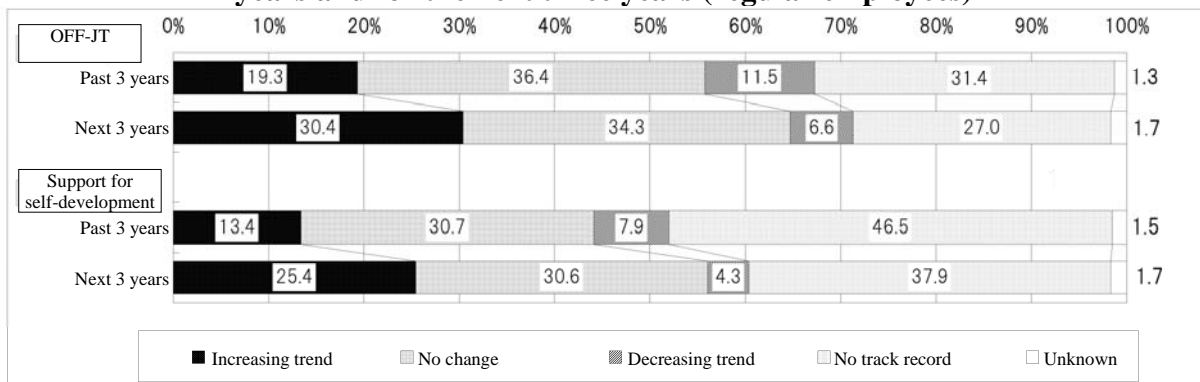
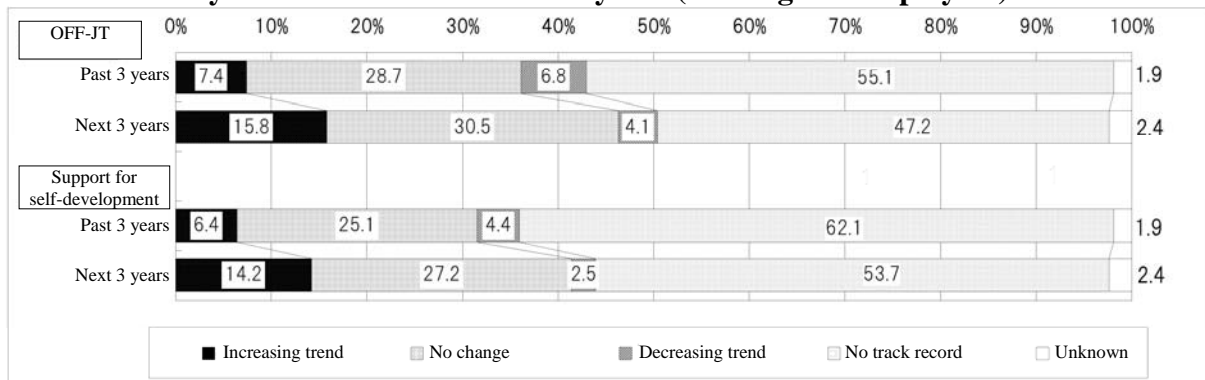


Figure 12 Costs for OFF-JT and for support for self-development over the past three years and for the next three years (non-regular employees)



2. Business Establishment Survey

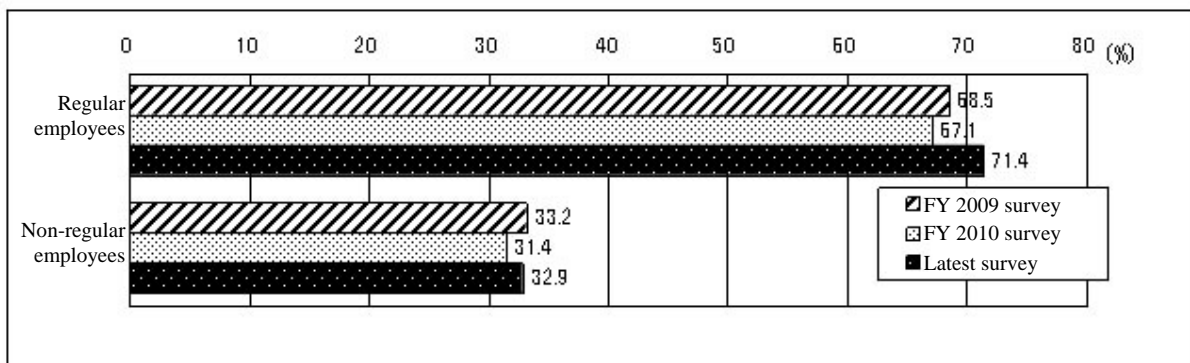
(1) State of implementation of education and training

1) State of implementation of OFF-JT (Figures 13 and 14)

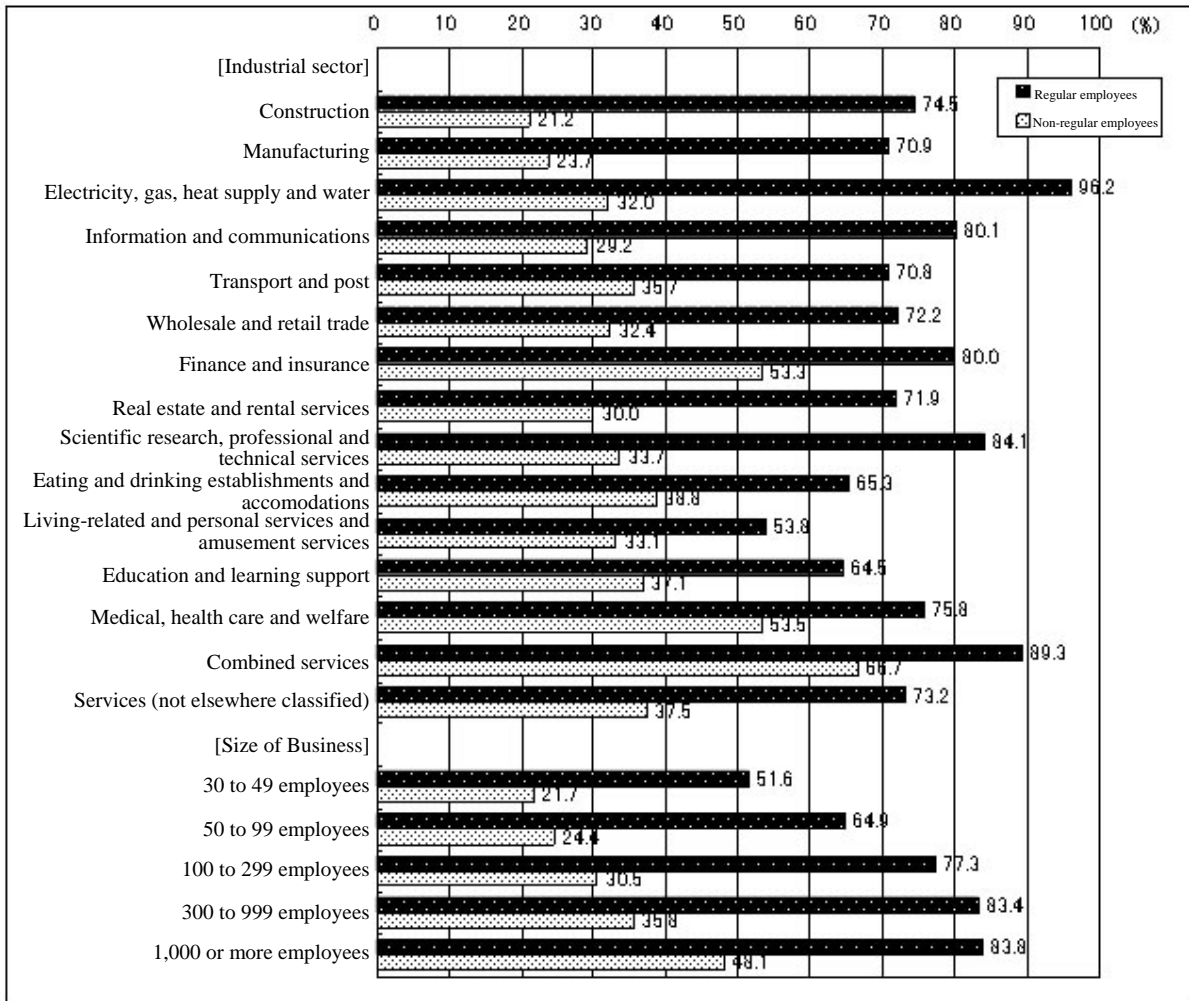
For regular employees, 71.4% (previous survey: 67.1%) of businesses implemented OFF-JT in fiscal 2010. Regarding the breakdown by industry, the proportions were as follows: high in Electricity, gas, heat supply and water (96.2%), Combined services (89.3%), Scientific research, professional and technical services (84.1%) and so on, while low in Living-related and personal services and amusement services (53.8%), Education and learning support (64.5%), and Eating and drinking establishments and accommodations (65.3%). 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, 32.9% (previous survey: 31.4%) of businesses implemented OFF-JT, representing a lower level than for regular employees. By industry, the proportions were as follows: high in Combined services (66.7%), Medical, health care and welfare (53.5%), and Finance and insurance (53.3%), while low in Construction (21.2%) and Manufacturing (23.7%). Categorized by size of the business, there is a tendency towards a higher proportion of larger businesses implementing OFF-JT.

Figure 13 Businesses that implemented OFF-JT (total)



**Figure 14 Businesses that implemented OFF-JT
(categorized by industrial sector and size of business)**



2) State of implementation of systematic OJT (Figures 15 and 16)

For regular employees, 63.0% (previous survey: 57.8%) of businesses implemented systematic OJT in fiscal 2010. This is the highest proportion ever since the survey started.

Regarding the breakdown by industry, the proportions were as follows: high in Electricity, gas, heat supply and water (94.6%), Finance and insurance (81.8%) and so on, whereas low in Living-related and personal services and amusement services (41.8%). Categorized by size of the business, more systematic OJT was provided 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, and in the 70% range at businesses with 300 or more employees.

On the other hand, for non-regular employees, 30.8% (previous survey: 27.7%) of businesses implemented systematic OJT, which represents a lower level than for regular employees. Regarding the breakdown by industry, the proportions were as follows: high in Combined services (57.1%), Eating and drinking establishments and accommodations (43.5%), Medical, health care and welfare (40.7%) and so on, whereas low in Information and communications (12.4%), Construction (15.0%), etc. Categorized by size of the business, there is a tendency towards a higher proportion of larger businesses implementing systematic OJT.

Figure 15 Businesses that implemented systematic OJT (total)

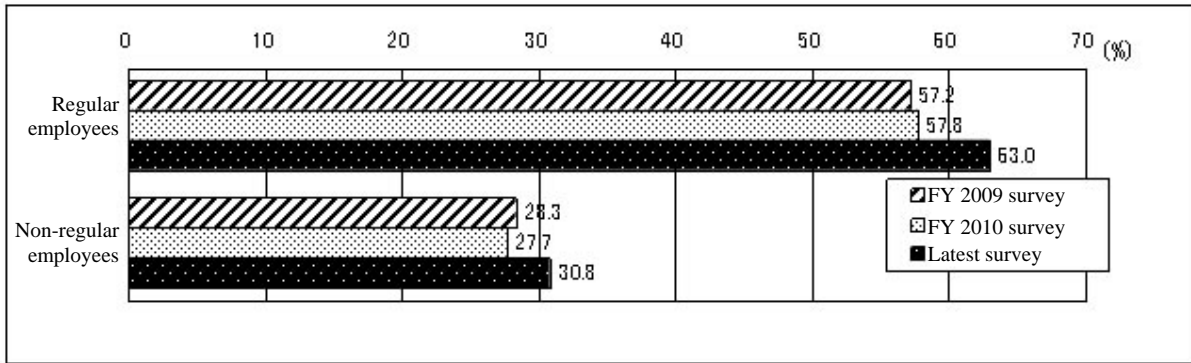
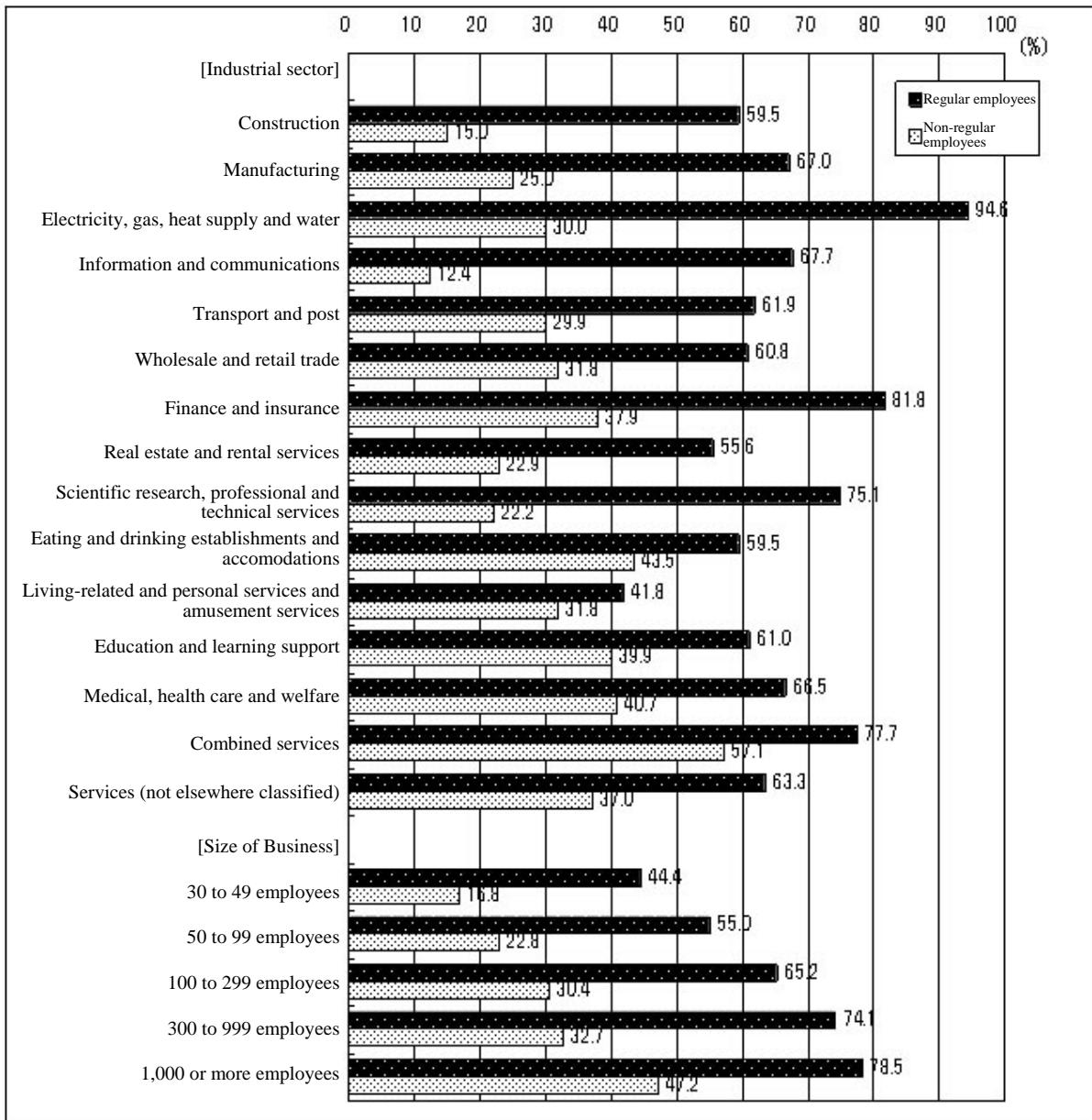


Figure 16 Businesses that implemented systematic OJT (categorized by industrial sector and size of business)



(2) Human resources development

1) Issues concerning human resources development (Figures 17 and 18)

Among responding businesses, 67.8% (previous survey: 67.5%) responded that they had problems with skills development and/or human resources development. Natures of issues were as follows (multiple answers allowed): “There are insufficient personnel to provide guidance” (51.7% [previous survey: 48.1%]) was the highest, followed by “There is no time for carrying out human resources development” (44.7% [previous survey: 46.6%]), “Even if we train personnel, they quit” (37.1% [previous survey: 35.8%]), “We cannot collect human resources who are worth training” (29.5% [previous survey: 27.4%]), and “We cannot afford to carry out personnel development” (22.6% [previous survey: 26.3%]).

Figure 17 Businesses that reported problems with human resources development

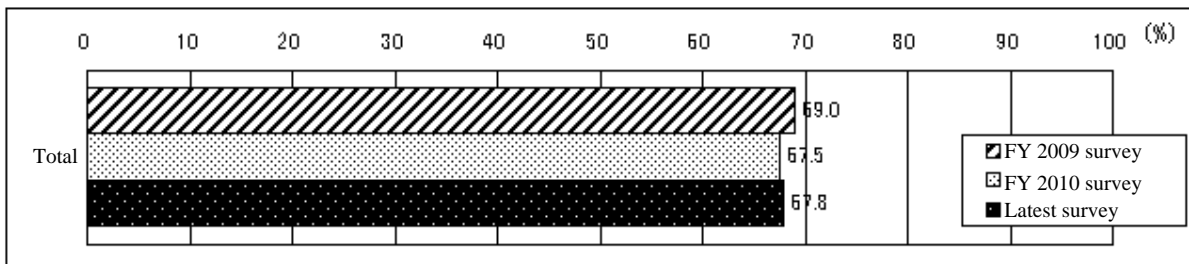
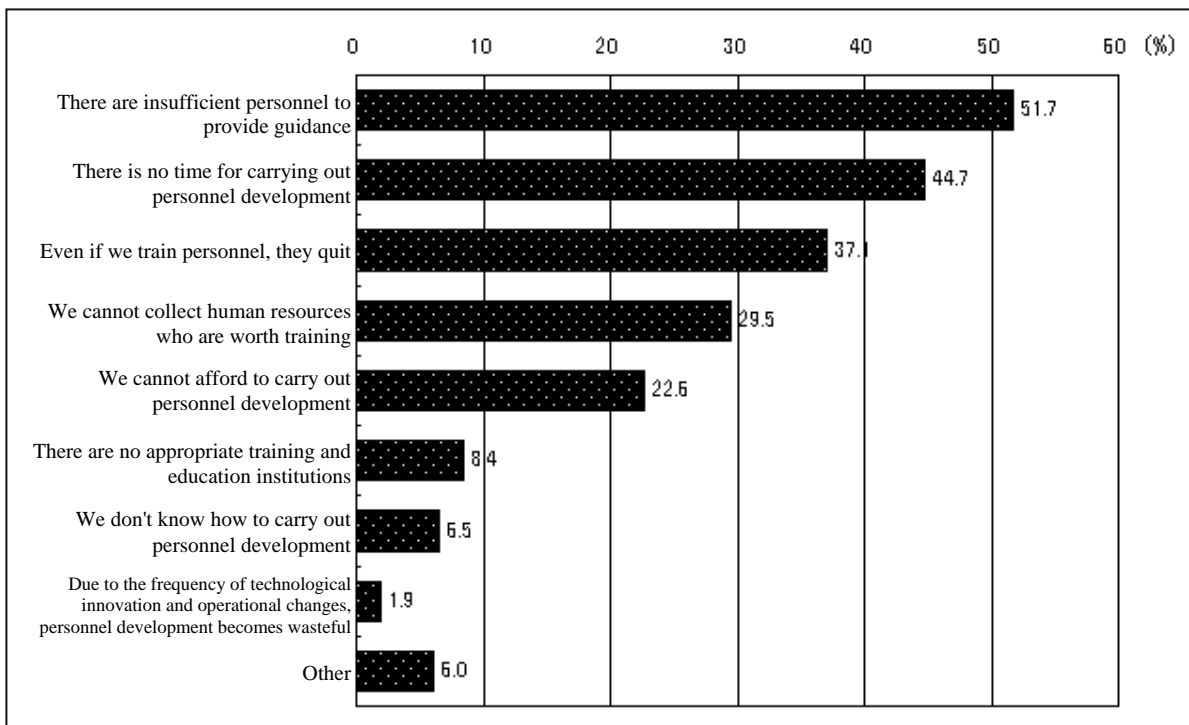


Figure 18 Breakdown of problems with human resources development (multiple answers allowed)



2) Awareness of abilities required of workers (Figures 19 and 20)

Among responding businesses, 87.2% (previous survey: 83.8%) reported that they have informed regular employees what abilities are required of them, with 47.3% (previous survey: 44.4%) responding “We inform our workers”, and 39.9% (previous survey: 39.4%) responding “We inform our workers to a certain extent”.

For non-regular employees, 76.1% (previous survey: 71.4%) of businesses reported that they have informed them thereof, with 33.6% (previous survey: 29.6%) responding “We inform our workers”, and 42.5% (previous survey: 41.8%) responding “We inform our workers to a certain extent”.

Both for regular and non-regular employees, the proportions of businesses that informed their workers what abilities are required of them increased from the previous survey.

Figure 19 Awareness of abilities required of workers (regular employees)

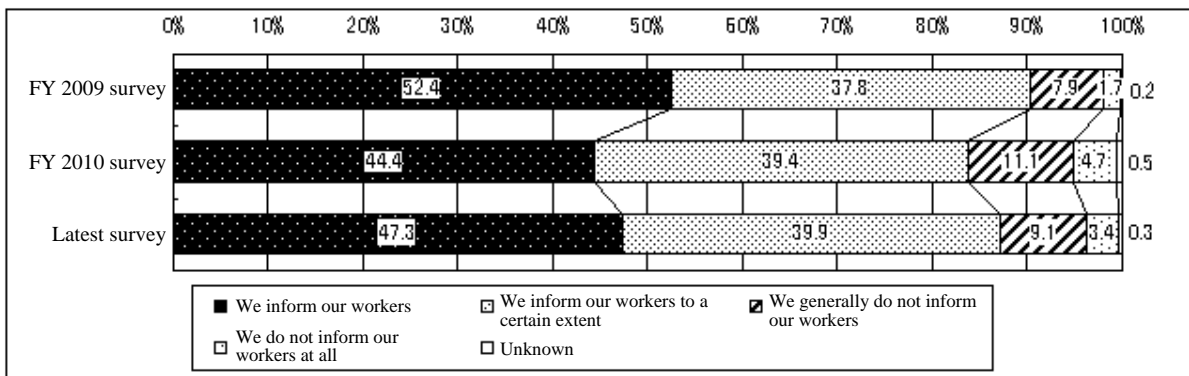
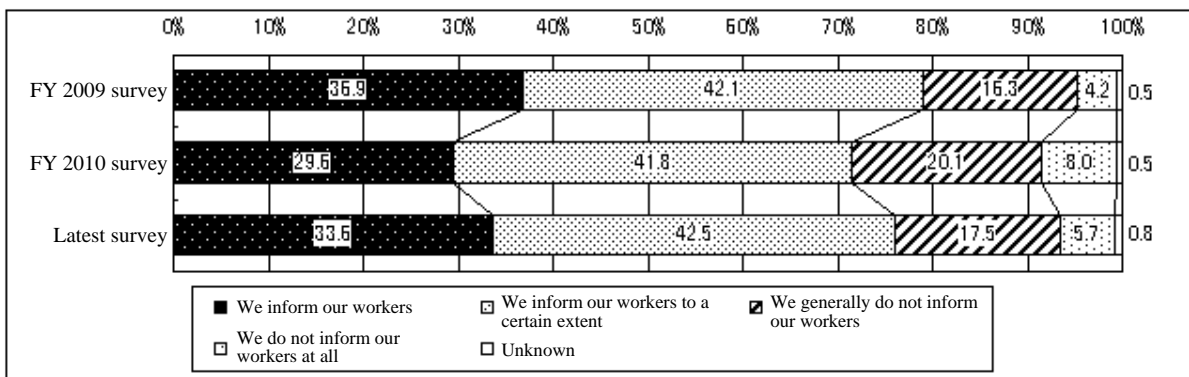


Figure 20 Awareness of abilities required of workers (non-regular employees)

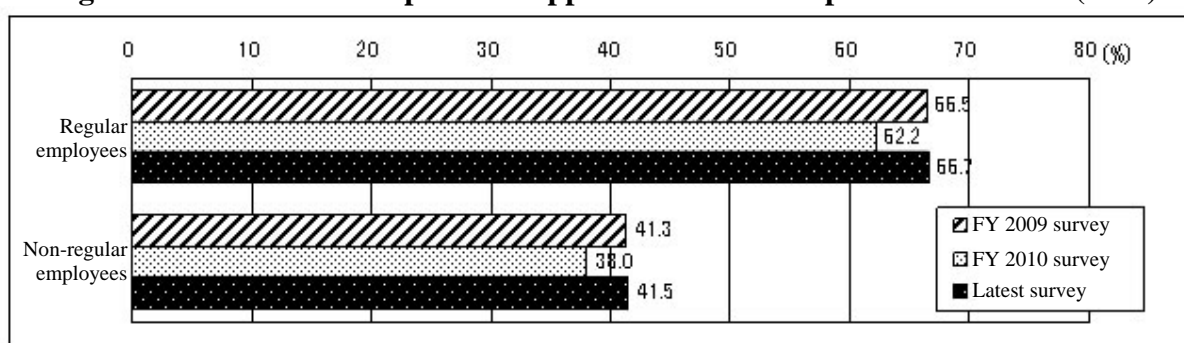


(3) Support for career planning

1) Support for self-development (Figures 21, 22 and 23)

Among responding businesses, 66.7% (previous survey: 62.2%) responded “We provide support” for self-development of regular employees. Regarding the breakdown by industry, the proportions were as follows: high in Combined services (97.6%), Electricity, gas, heat supply and water (95.3%), Finance and insurance (88.5%) and so on, whereas low in Eating and drinking establishments and accommodations (52.5%), Living-related and personal services and amusement services (58.5%), Education and learning support (59.2%), 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 100 or more employees, in the 60% range at businesses with 100 to 299 employees, and in the 70% range at businesses with 300 to 999 employees, and in the 80% range at businesses with 1,000 or more employees.

Figure 21 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 80.7% (previous survey: 82.9%), followed by “Provision of information concerning training and education institutions, correspondence learning etc.” at 43.9% (previous survey: 45.4%), and “Support for autonomous study groups within the company” at 42.0% (previous survey: 41.2%).

On the other hand, 41.5% (previous survey: 38.0%) 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 (90.3%), Finance and insurance (67.7%), and Medical, health care and welfare (67.0%), whereas low in Eating and drinking establishments and accommodations (31.2%), Living-related and personal services and amusement services (34.2%), Manufacturing (35.2%), and Education and learning support (37.7%). 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 67.2% (previous survey: 70.5%), followed by “Support for autonomous study groups within the company” at 43.4% (previous survey: 41.9%) and “Provision of information concerning training and education institutions, correspondence learning etc.” at 42.2% (previous survey: 42.1%).

**Figure 22 Businesses that provide support for self-development of workers
(categorized by industrial sector and size of business)**

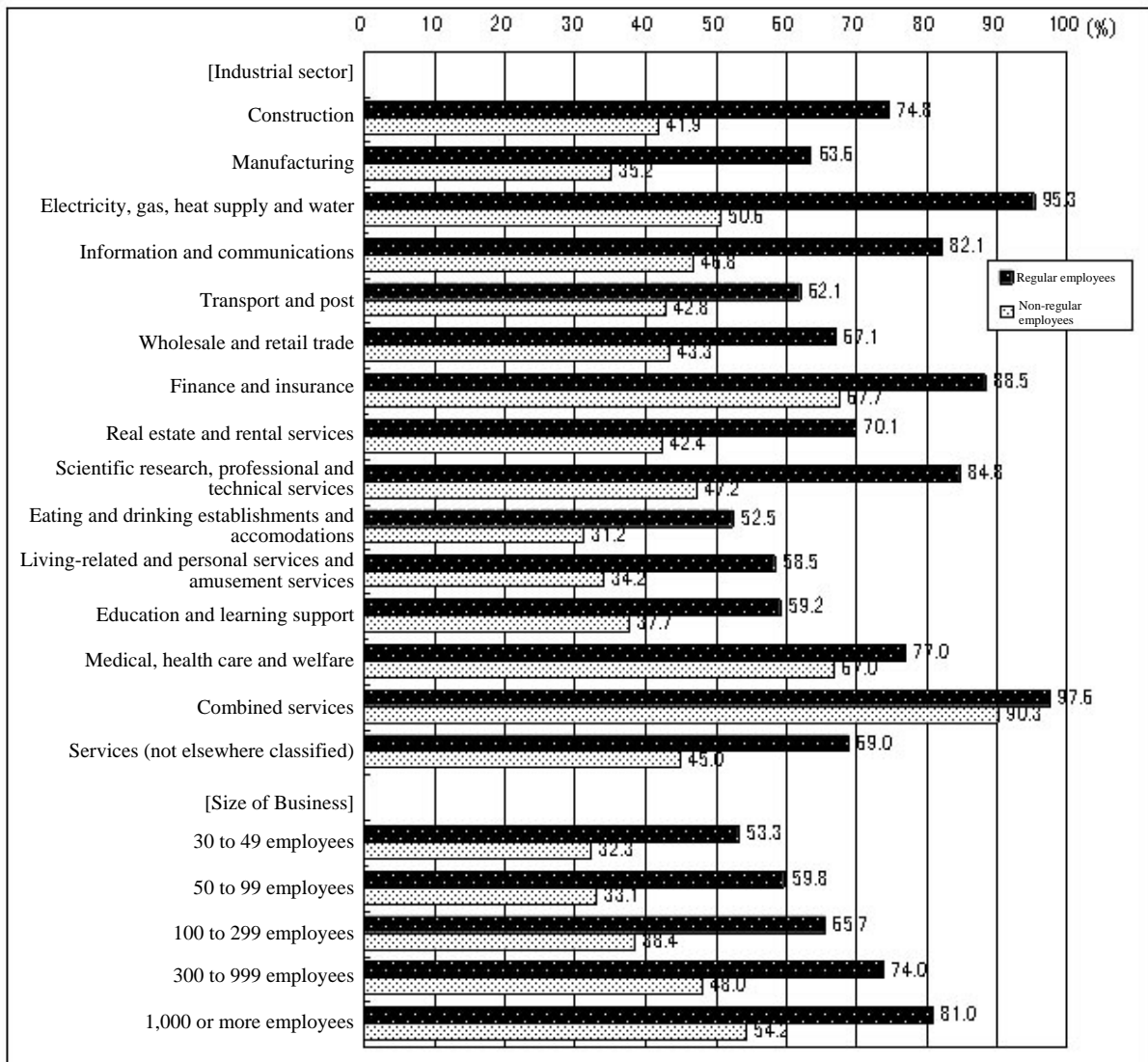
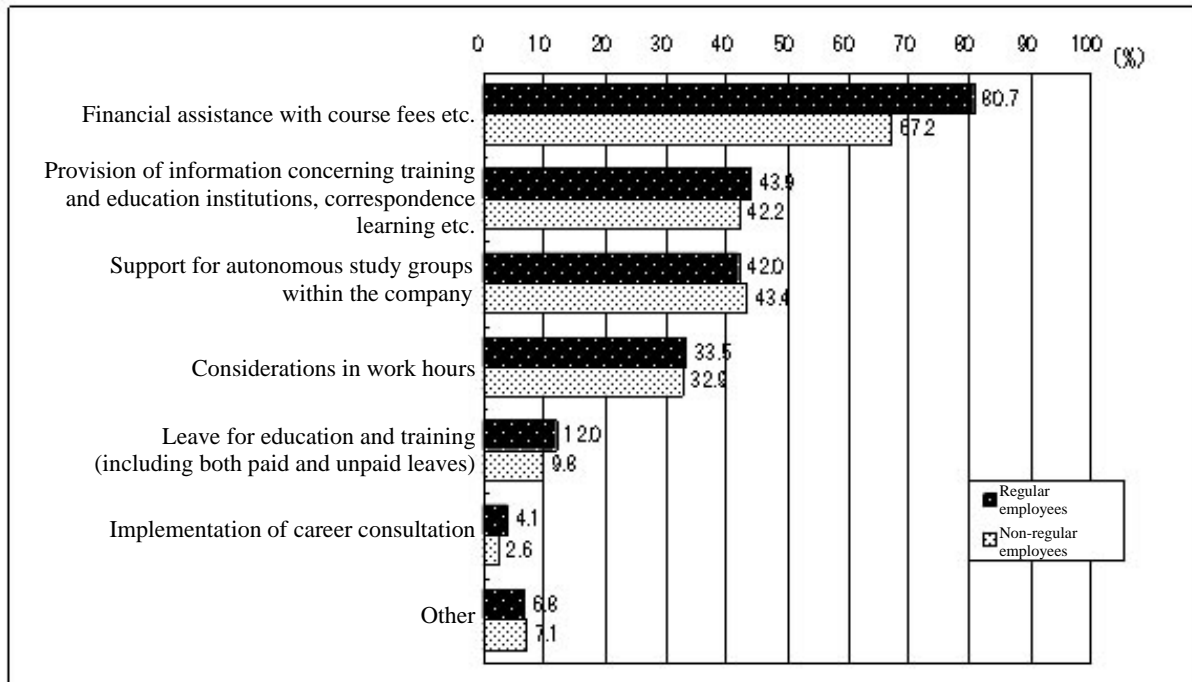


Figure 23 Nature of support for self-development of workers (multiple answers allowed)



2) State of implementation of leave systems for education and training (Figures 24 and 25)

Only 6.3% (previous survey 4.2%) of businesses implement a leave system for education and training. By industry, the figure was high in Combined services (36.1%), followed by Electricity, gas, heat supply and water (22.3%). Differences between categories by business size were small, though the rate of implementation was the highest among businesses with 30 to 49 employees.

Figure 24 Businesses that implement a leave system for education and training (total)

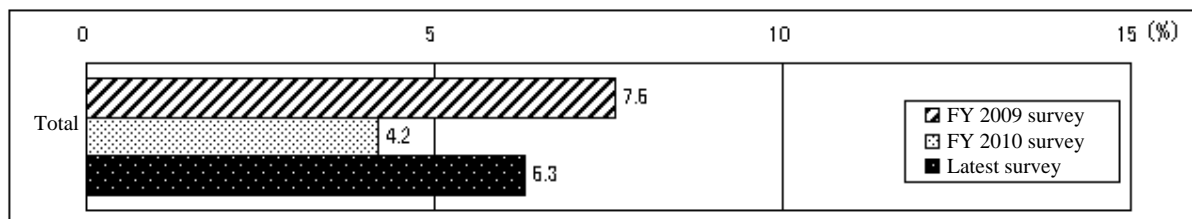
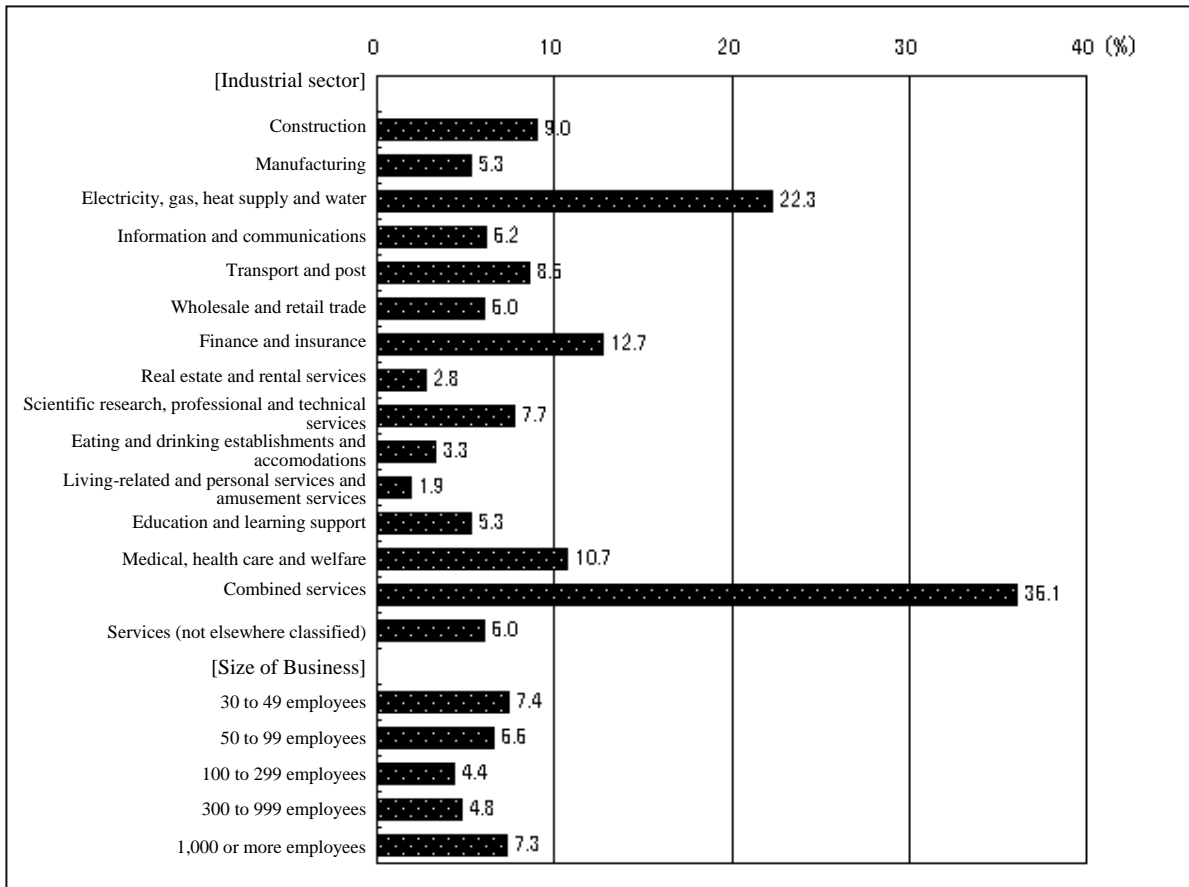


Figure 25 Businesses that implement a leave system for education and training (categorized by industrial sector and size of business)

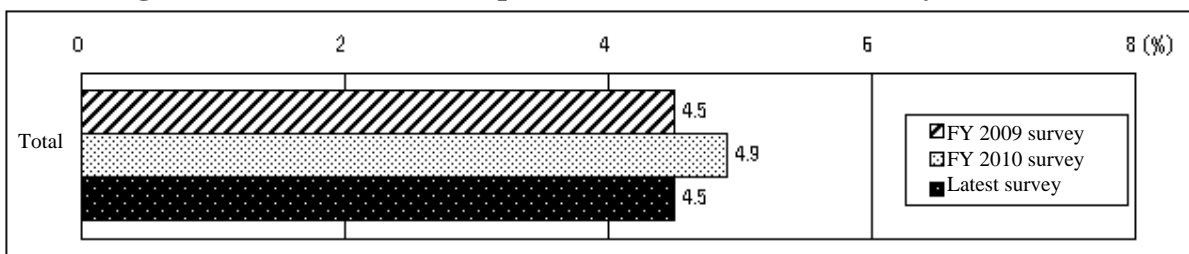


3) State of implementation of career consultation systems (Figures 26, 27 and 28)

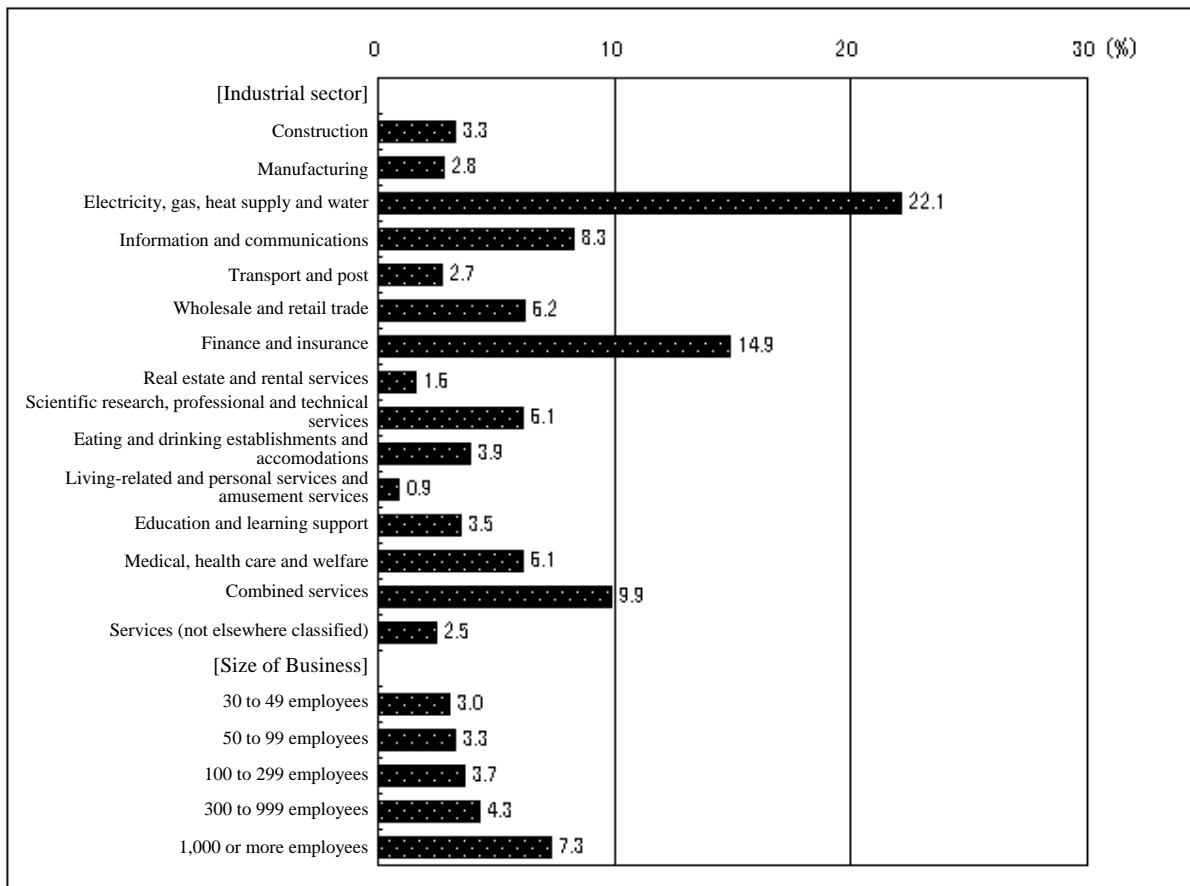
Only 4.5% (previous survey: 4.9%) of businesses implemented a career consultation system. By industry, the proportion was high in Electricity, gas, heat supply and water (22.1%) and in Finance and insurance (14.9%). Categorized by size of the business, the proportion for businesses with 1,000 or more employees was the highest at 7.3%.

With regards to the specific reasons offered by businesses that did not implement a career consultation system (multiple answers allowed), the proportion of businesses that responded “We did not know about the system” was the highest at 41.8% (previous survey: 44.3%).

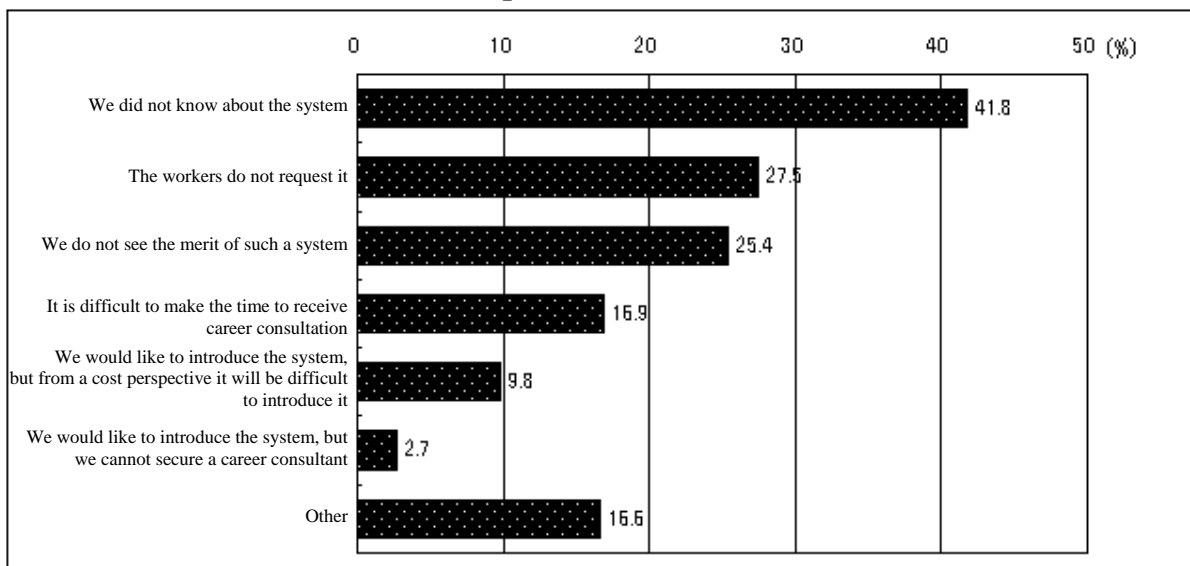
Figure 26 Businesses that implement a career consultation system (total)



**Figure 27 Businesses that implement a career consultation system
(categorized by industrial sector and size of business)**



**Figure 28 Reasons for not implementing a career consultation system
(multiple answers allowed)**



4) State of provision of avenues for considering career planning (Figures 29 and 30)

Among responding businesses, 43.7% (previous survey: 39.3%) 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 88.2% (previous survey: 87.8%), followed by “Self-assessment system” at 49.5% (previous survey: 49.8%).

On the other hand, 26.7% (previous survey: 22.0%) 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 the highest at 89.4% (previous survey: 87.2%).

Figure 29 Businesses that provide avenues for considering career planning (total)

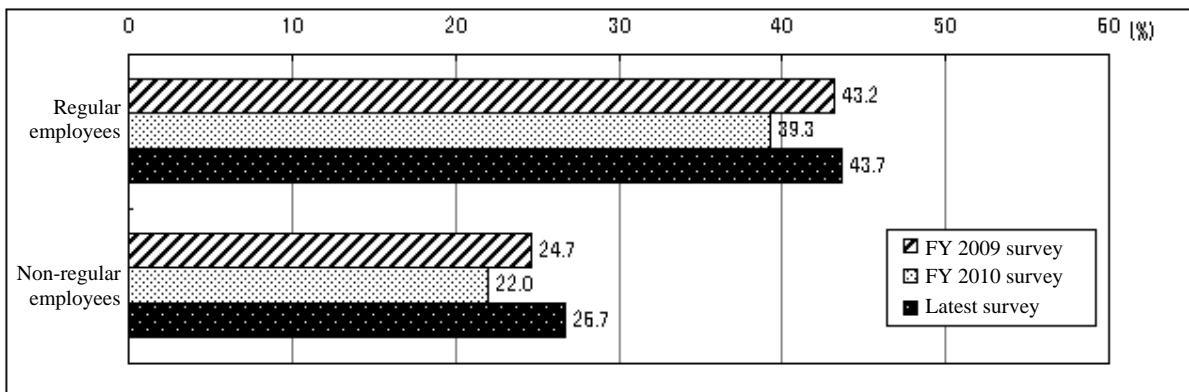
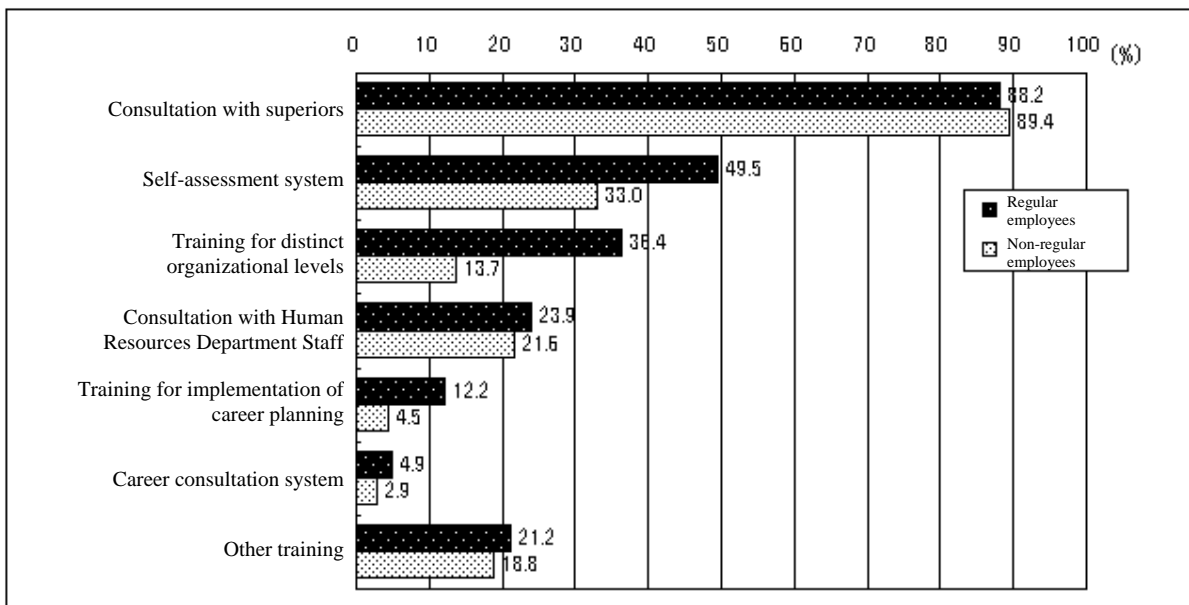


Figure 30 Means of providing avenues for considering career planning (multiple answers allowed)



(4) Vocational ability evaluations

1) State of implementation of vocational ability evaluations (Figures 31 and 32)

The proportion of businesses that implemented vocational ability evaluations was 68.2% (previous survey: 65.3%), reaching the highest level ever. By industry, the proportions were as follows: high in Combined services (96.3%), Finance and insurance (84.1%), Electricity, gas, heat supply and water (83.2%) and so on, whereas low in Transport and post (57.8%). 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 in the 80% range at businesses with 1,000 or more employees.

Figure 31 Businesses implementing vocational ability evaluations (total)

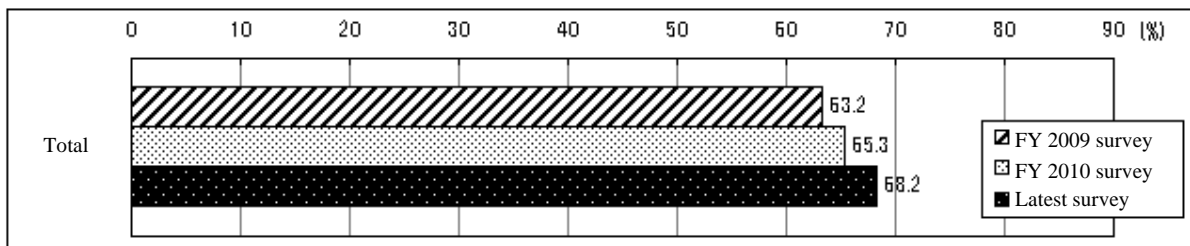
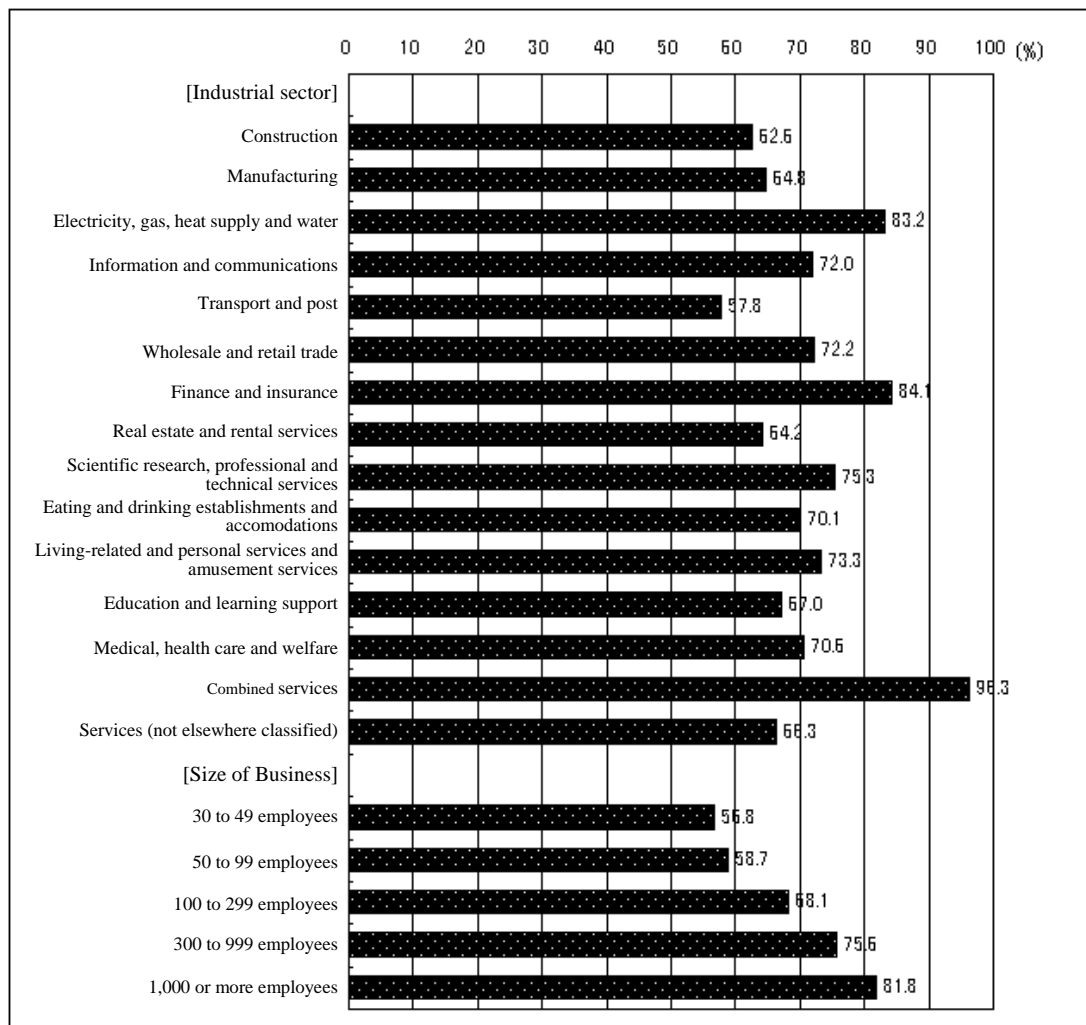


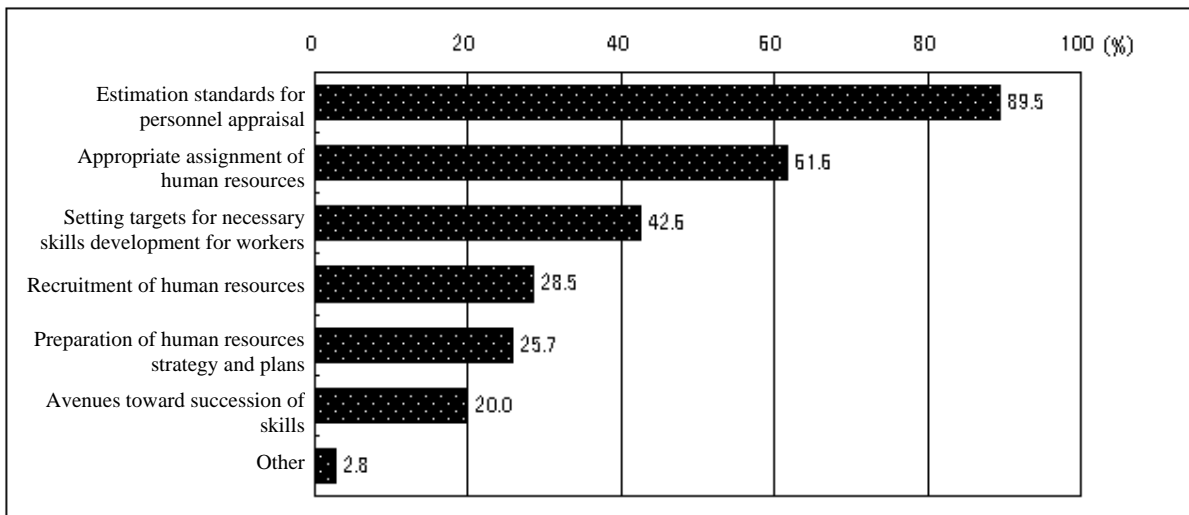
Figure 32 Businesses implementing vocational ability evaluations (categorized by industrial sector and size of business)



2) Methods for utilization of vocational ability evaluations (Figure 33)

Concerning methods for utilization of vocational ability evaluations (multiple answers allowed), the response “Estimation standards for personnel appraisal” was the highest at 89.5% (previous survey: 88.8%), followed by “Appropriate assignment of human resources” at 61.6% (previous survey: 63.0%), and “Setting targets for necessary skills development for workers” at 42.6% (previous survey: 40.9%).

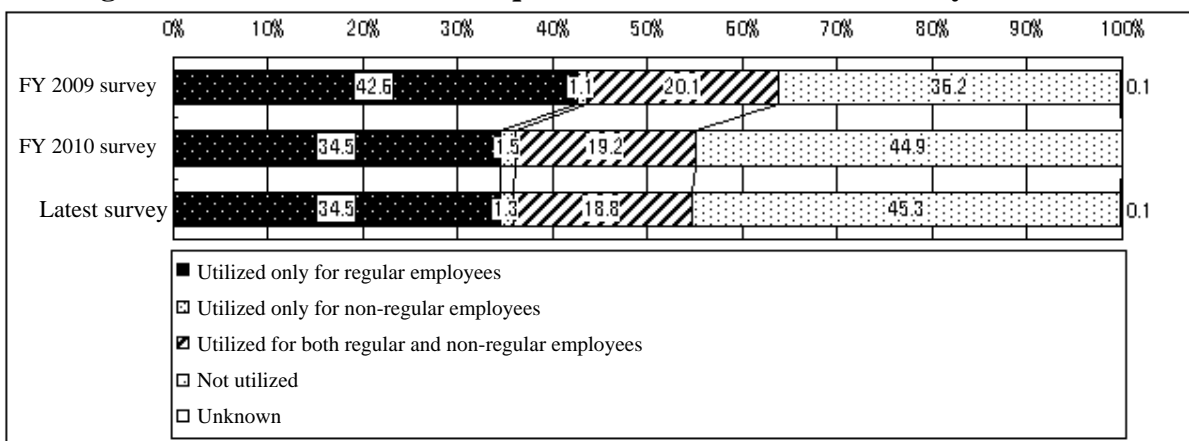
Figure 33 Methods for utilization of vocational ability evaluations (multiple answers allowed)



3) State of utilization of qualifications in vocational ability evaluations (Figures 34 and 35)

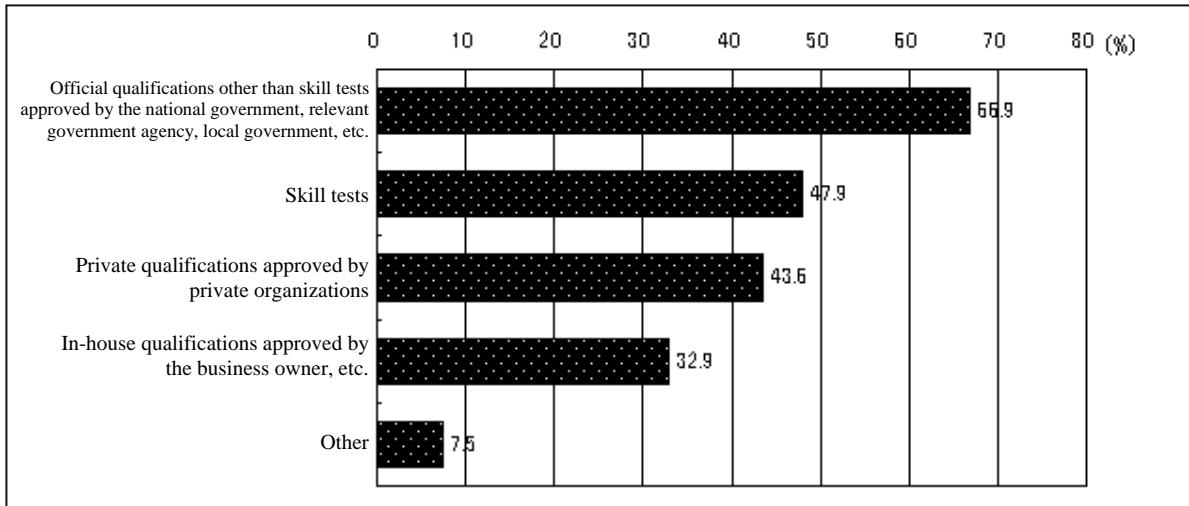
Concerning the state of utilization of qualifications in vocational ability evaluations among businesses that implemented vocational ability evaluations, 34.5% (previous survey: 34.5%) of businesses responded “Utilized only for regular employees”, and 18.8% (previous survey: 19.2%) responded “Utilized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

Figure 34 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 66.9% (previous survey: 65.7%), “Skill tests” at 47.9% (previous survey: 50.0%), and “Private qualifications approved by private organizations” at 43.6% (previous survey: 41.8%).

Figure 35 Utilized qualifications (multiple answers allowed)



4) Issues with vocational ability evaluations (Figures 36, 37 and 38)

Among responding businesses, 66.8% (previous survey: 63.4%) responded that they had issues with vocational ability evaluations. By industry, the proportions were as follows: high in Information and communications (80.1%), Scientific research, professional and technical services (75.1%), Medical, health care and welfare (74.0%) and so on, whereas low in Eating and drinking establishments and accommodations (57.0%), and Finance and insurance (58.8%). 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” (79.0% [previous survey: 78.2%]) was high, followed by “Evaluation content varies due to evaluators’ lack of awareness about evaluation criteria” (41.7% [previous survey: 41.1%]).

Differences between categories by business size were small, though the rate was high in the 70% range among businesses with 50 to 999 employees.

Figure 36 Businesses that responded that they had issues with vocational ability evaluations (total)

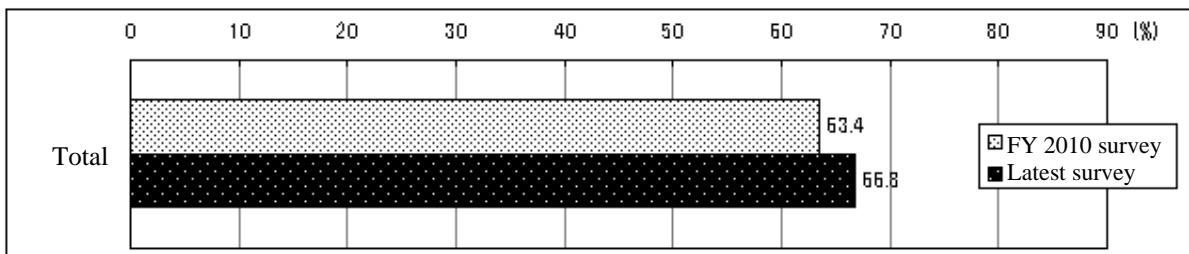


Figure 37 Businesses that responded that they had issues with vocational ability evaluations (categorized by industrial sector and size of business)

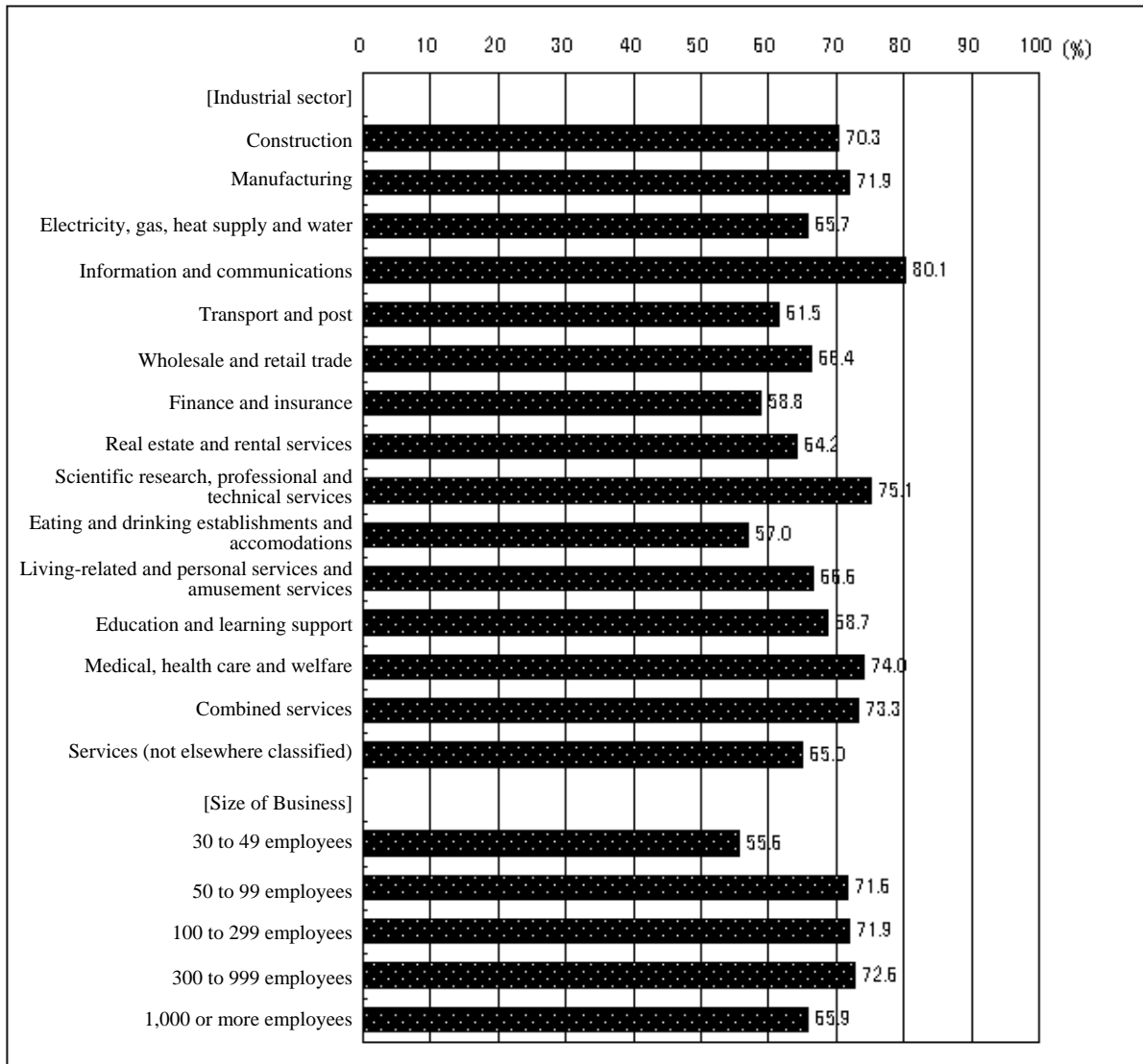
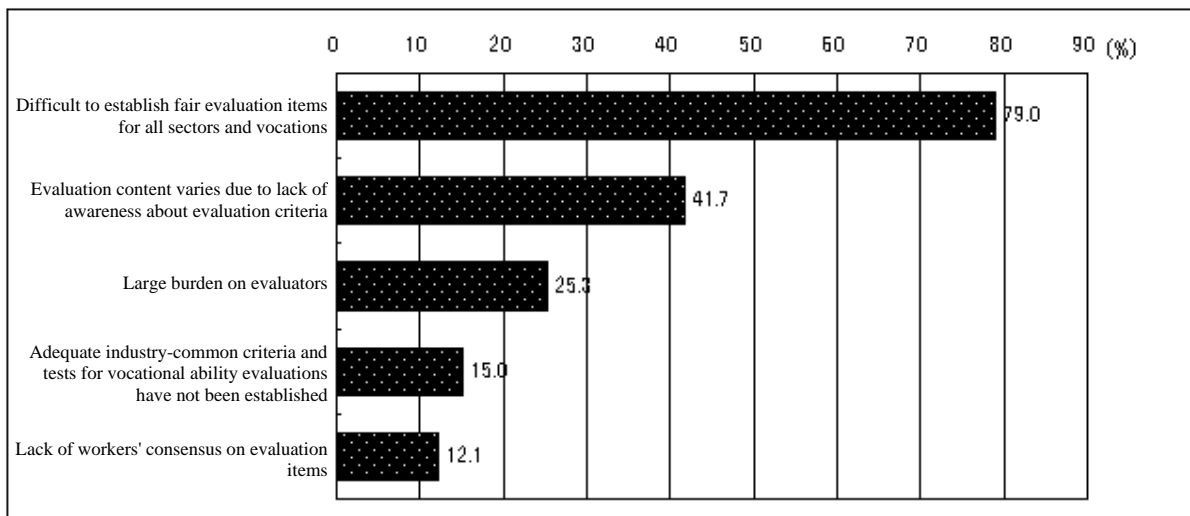


Figure 38 Nature of issues with vocational ability evaluations (multiple answers allowed)



5) Creation of cross-sectoral criteria for vocational ability evaluations (Figures 39, 40 and 41)

Among responding businesses, 73.6% (previous survey: 74.8%) 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: high in Medical, health care and welfare (81.8%), Information and communications (81.7%) and so on, whereas low in Electricity, gas, heat supply and water (48.7%). 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” (55.0% [previous survey: 53.2%]) and “It can be used effectively for the creation and improvement of the company’s vocational ability evaluation system” (49.7% [previous survey: 48.5%]) were high.

Figure 39 Businesses that responded that there are merits with creating cross-sectoral criteria for vocational ability evaluations (total)

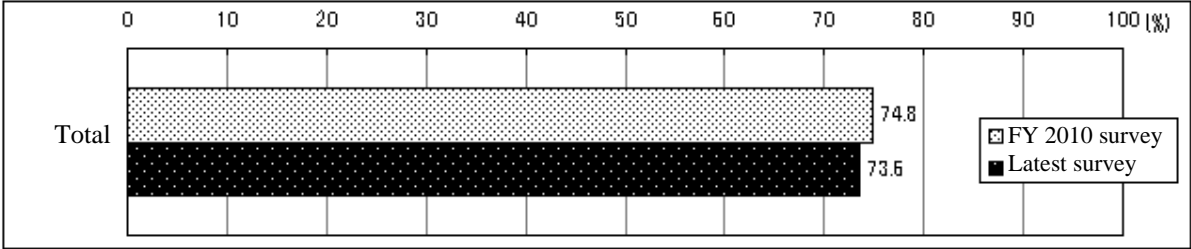


Figure 40 Businesses that responded that there are merits with creating cross-sectoral criteria for vocational ability evaluations (categorized by industrial sector and size of business)

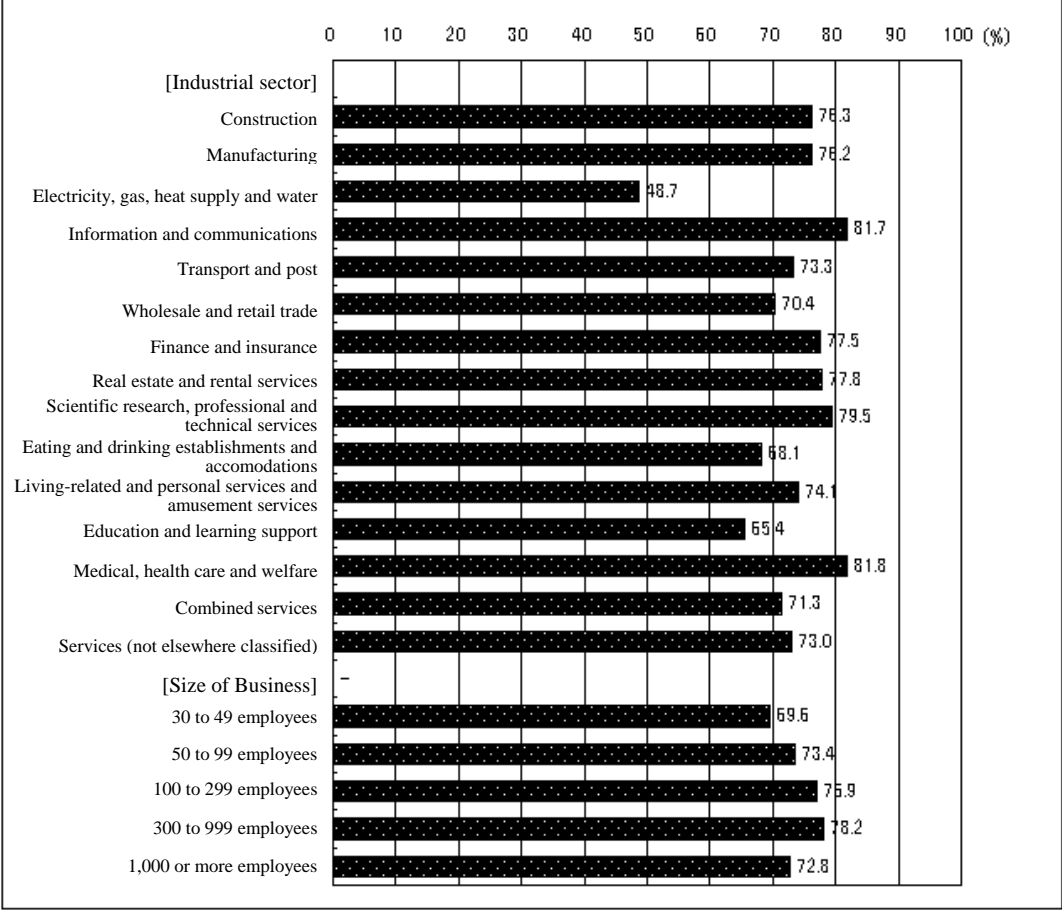
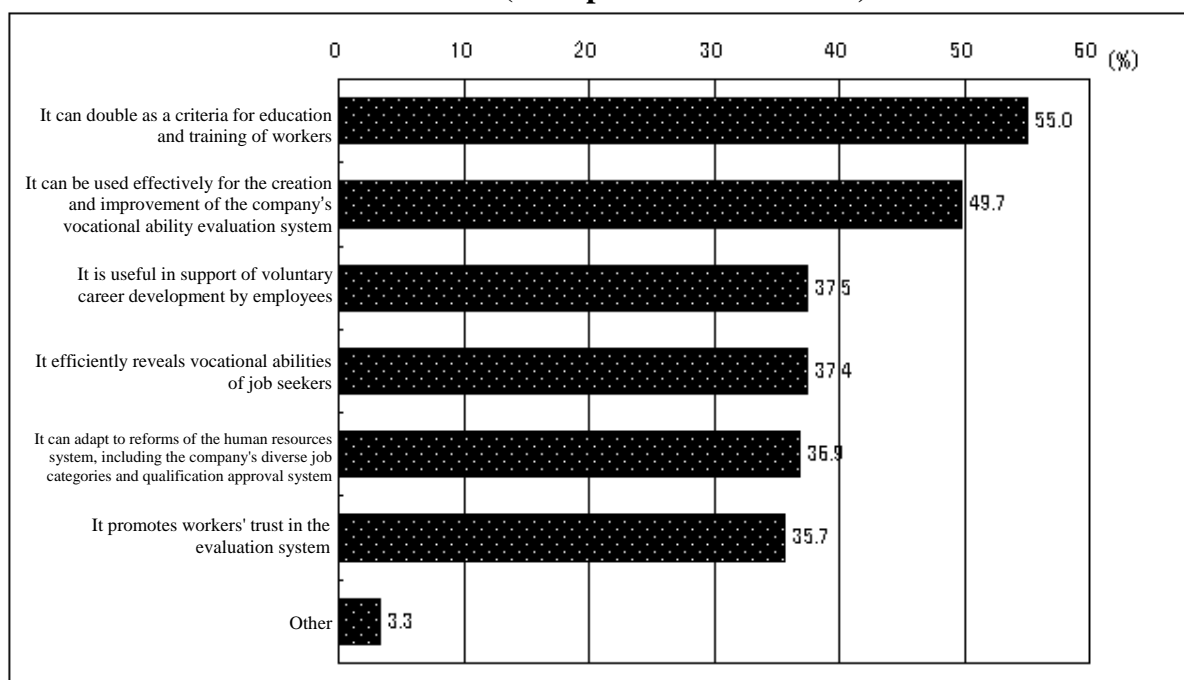


Figure 41 Nature of merits of creating cross-sectoral criteria for vocational ability evaluations (multiple answers allowed)



(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 42 and 43)

The National Trade Skill Test system, conducted by the Ministry of Health, Labour and Welfare, was known to 48.9% of responding businesses. By industry, the proportions were high in Construction (68.3%), Manufacturing (62.9%), Finance and insurance (60.3%), and Scientific research, professional and technical services (57.0%), while low in Medical, health care and welfare (30.4%) and Eating and drinking establishments and accommodations (33.5%).

Figure 42 Businesses that know about the National Trade Skill Test system (total)

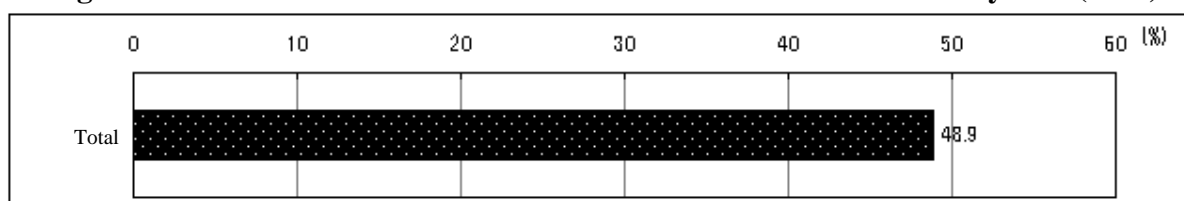
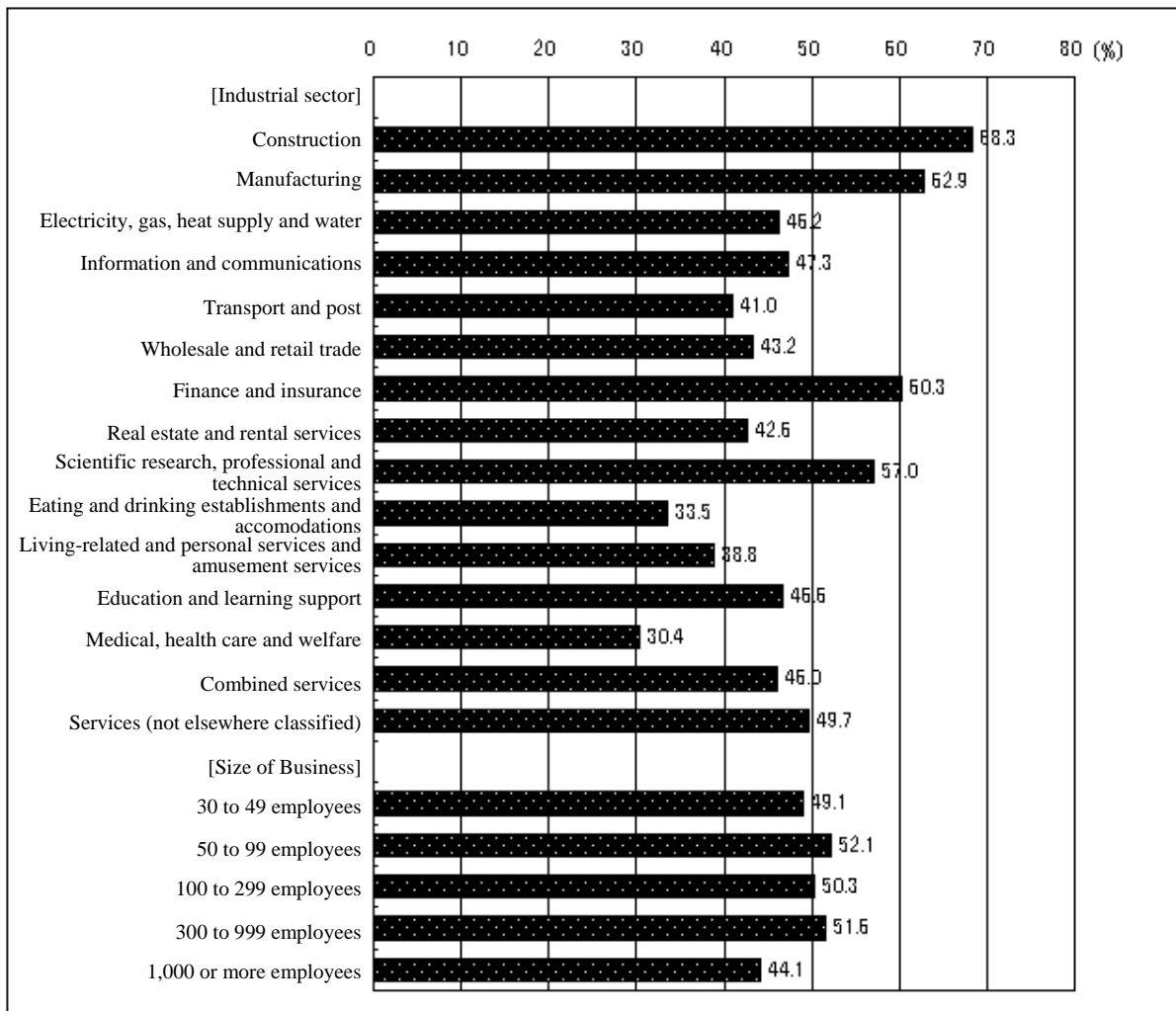


Figure 43 Businesses that know about the National Trade Skill Test system (categorized by industrial sector and size of business)



2) Benefits and problems of the National Trade Skill Test (Figures 44 and 45)

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” (86.9%), followed by “Can be utilized for recruitment, re-assignment, promotion, etc.” (44.5%), and “Presence of a certified technician takes a positive effect on business dealings, etc.” (32.3%).

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” (39.7%) and “Frequency and venues of the National Trade Skill Test are limited” (39.5%), followed by “It takes workers much time for preparing for and undergoing the test” (31.8%) and “The test fee is expensive” (28.7%).

Figure 44 Benefits of the National Trade Skill Test (multiple answers allowed)

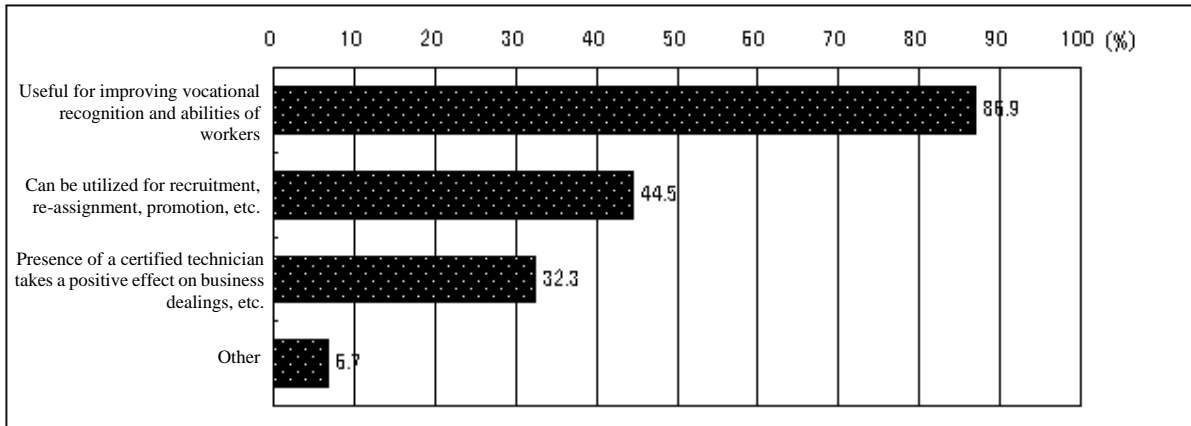
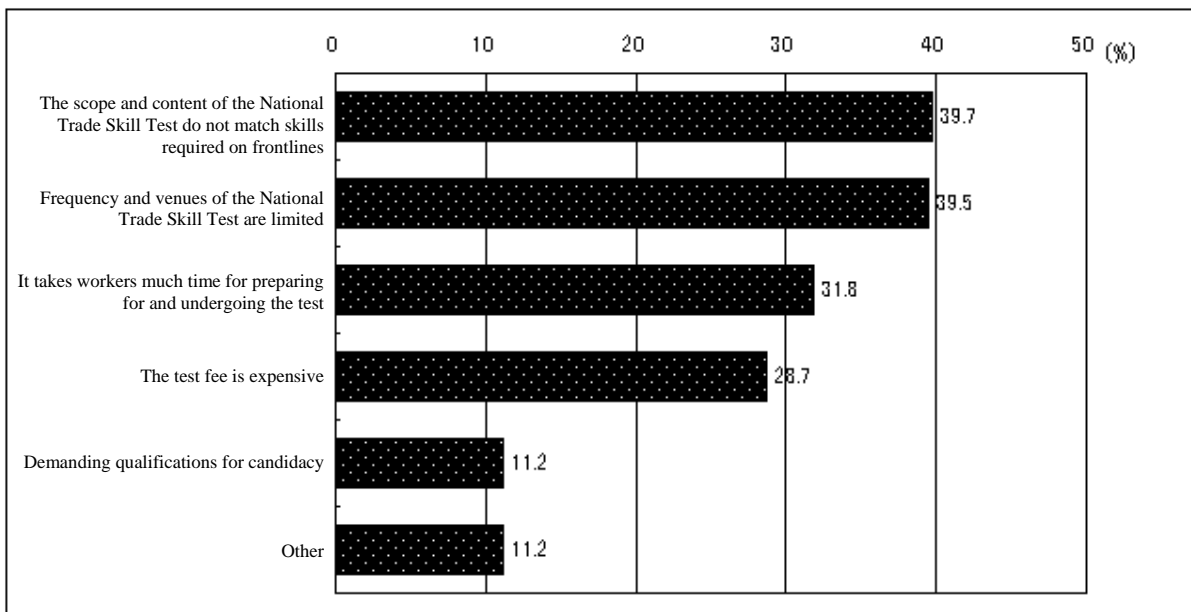


Figure 45 Problems in the National Trade Skill Test system (multiple answers allowed)



(6) Succession of skills

1) Issues with succession of skills (Figures 46 and 47)

Among responding businesses, 28.2% (previous survey: 27.4%) 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 (65.8%), Manufacturing (49.1%), Construction (48.7%), and Scientific research, professional and technical services (42.8%), whereas low in Living-related and personal services and amusement services (10.7%), Eating and drinking establishments and accommodations (13.3%) and so on.

Figure 46 Businesses that responded that they had an issue with the succession of skills when the baby-boom generation retires and so on (total)

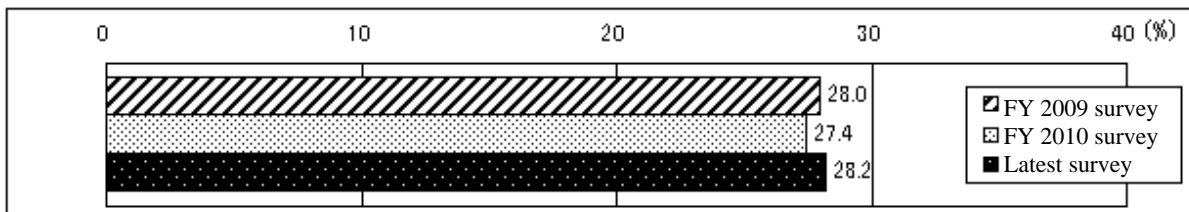
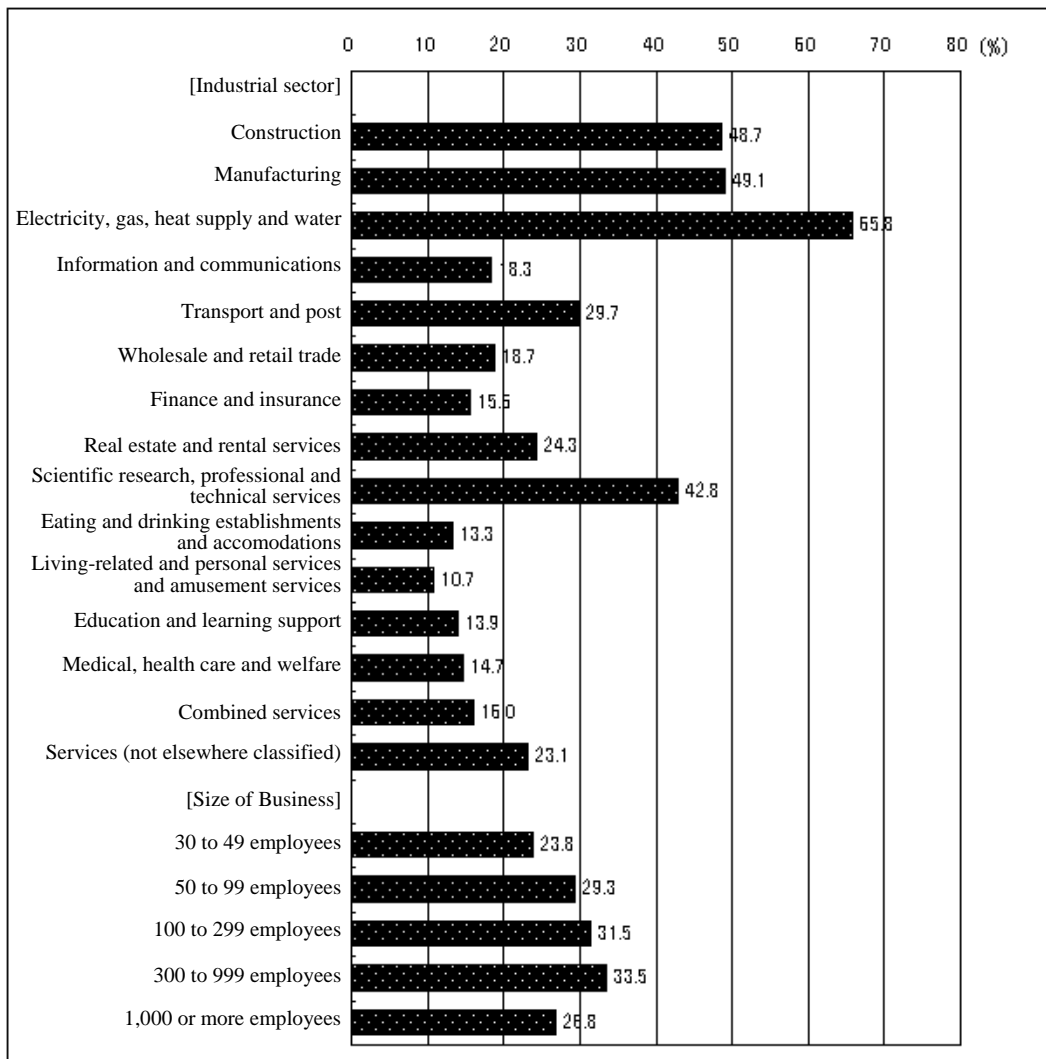


Figure 47 Businesses that responded that they had an issue with the succession of skills when the baby-boom generation retires and so on (categorized by industrial sector and size of business)



2) State of initiatives concerning succession of skills (Figures 48 and 49)

Among responding businesses, 78.0% (previous survey: 78.8%) 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 61.2% (previous survey: 63.1%). Other high response ratios included, “We are increasing mid-career hiring” (28.9% [previous survey: 29.8%]), “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: 20.3%]).

Figure 48 Businesses that are taking initiatives towards the succession of skills (total)

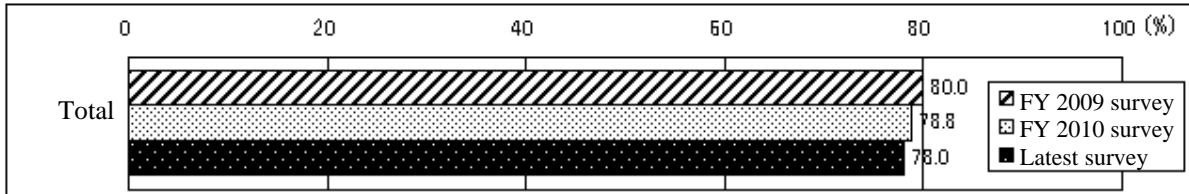
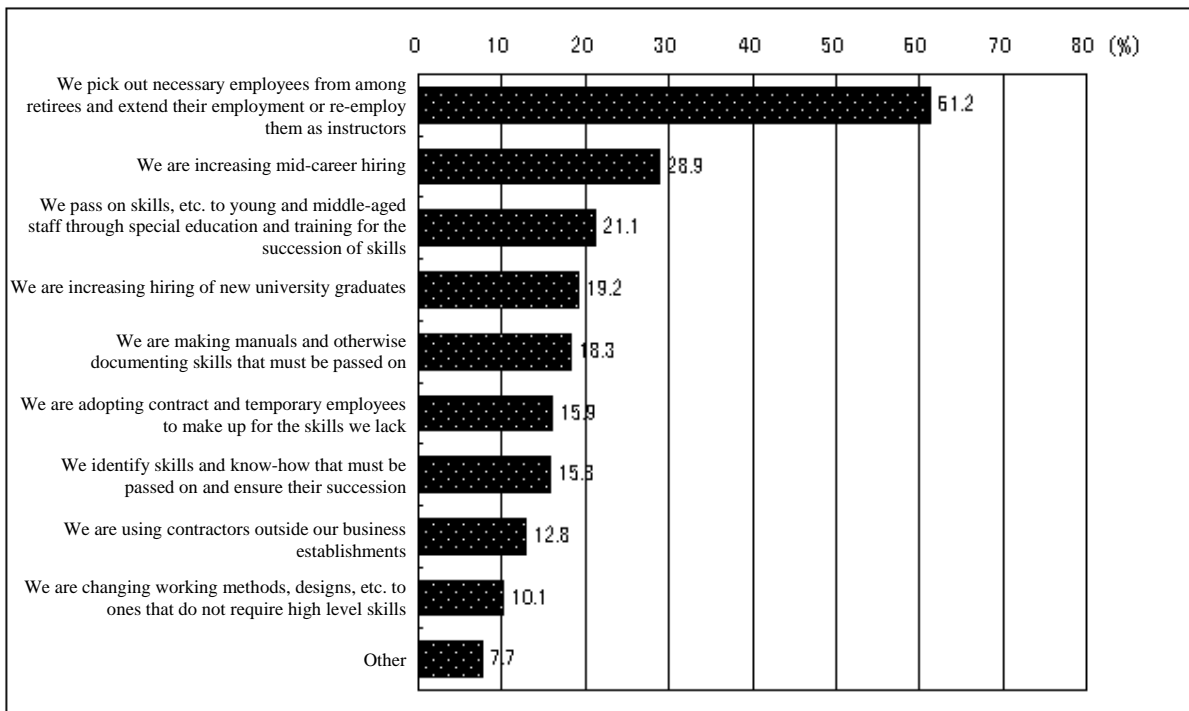


Figure 49 Nature of initiatives taken by businesses towards the succession of skills (multiple answers allowed)



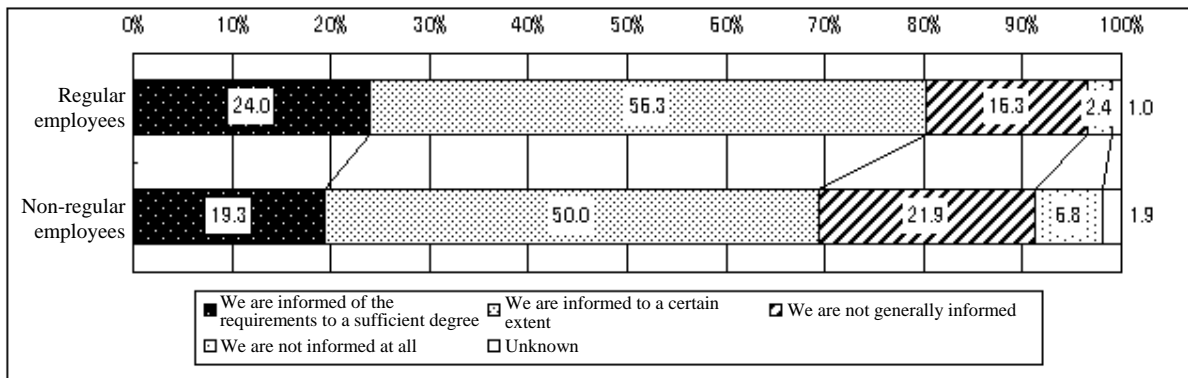
3. Individual Survey

(1) Education and training attended through the company

1) Awareness of abilities required of workers (Figure 50)

Concerning awareness of abilities required of workers, 24.0% (previous survey: 23.4%) of regular employees reported “We are informed of the requirements to a sufficient degree”, while 56.3% (previous survey: 54.7%) responded “We are informed to a certain extent”, which means that 80.3% (previous survey: 78.1%) of workers are informed of the requirements. On the other hand, 19.3% (previous survey: 17.4%) of non-regular employees reported “We are informed of the requirements to a sufficient degree”, while 50.0% (previous survey: 50.4%) responded “We are informed to a certain extent”, representing overall non-regular employees who were informed at 69.3%, a ratio lower than that of regular employees by 11 points. The ratio of non-regular employees who responded “We are generally not informed” or “We are not informed at all” stood at 28.7% (previous survey: 29.7%), 10 points higher than that of regular employees.

Figure 50 Awareness of abilities required of workers



2) State of participation in OFF-JT (Figures 51 and 52)

The ratio of workers who participated in OFF-JT in fiscal 2010 was 41.4% (previous survey: 41.5%) of regular employees and 19.2% (previous survey: 19.0%) of non-regular employees. By industry, for regular employees, the proportions were as follows: high in Electricity, gas, heat supply and water (53.4%) and so on, whereas low in Living-related and personal services and amusement services (23.9%) and so on. For non-regular employees, the proportions were as follows: high in Medical, health care and welfare (30.5%) and so on, whereas low in Living-related and personal services and amusement services (9.2%) 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: Electricity, gas, heat supply and water, Manufacturing, and Real estate and rental services.

Categorized by size of the business, the participation ratio of regular employees stood in the first half of the 40% range for companies with 100 to 299 employees, and in the middle of the 40% range for companies with 300 or more employees. On the other hand, differences between business sizes were small with non-regular employees. The figure exceeded 20% for companies with 1,000 or more employees only, and the figures for other categories stood in the 10% range.

Figure 51 Workers who participated in OFF-JT (total)

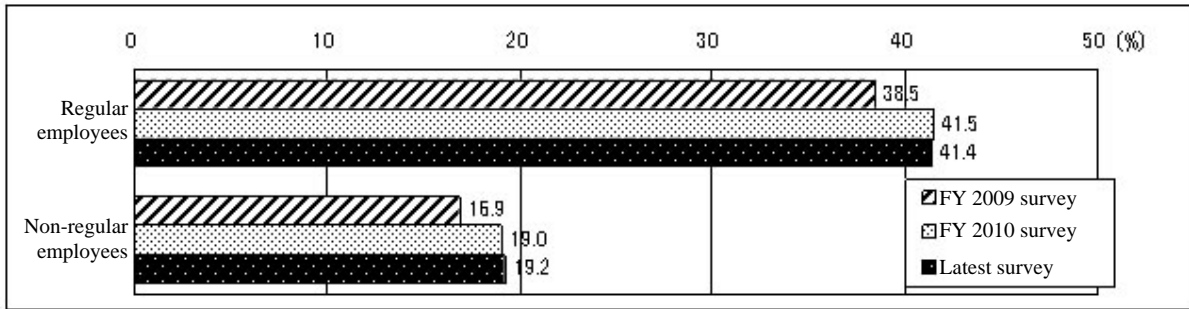
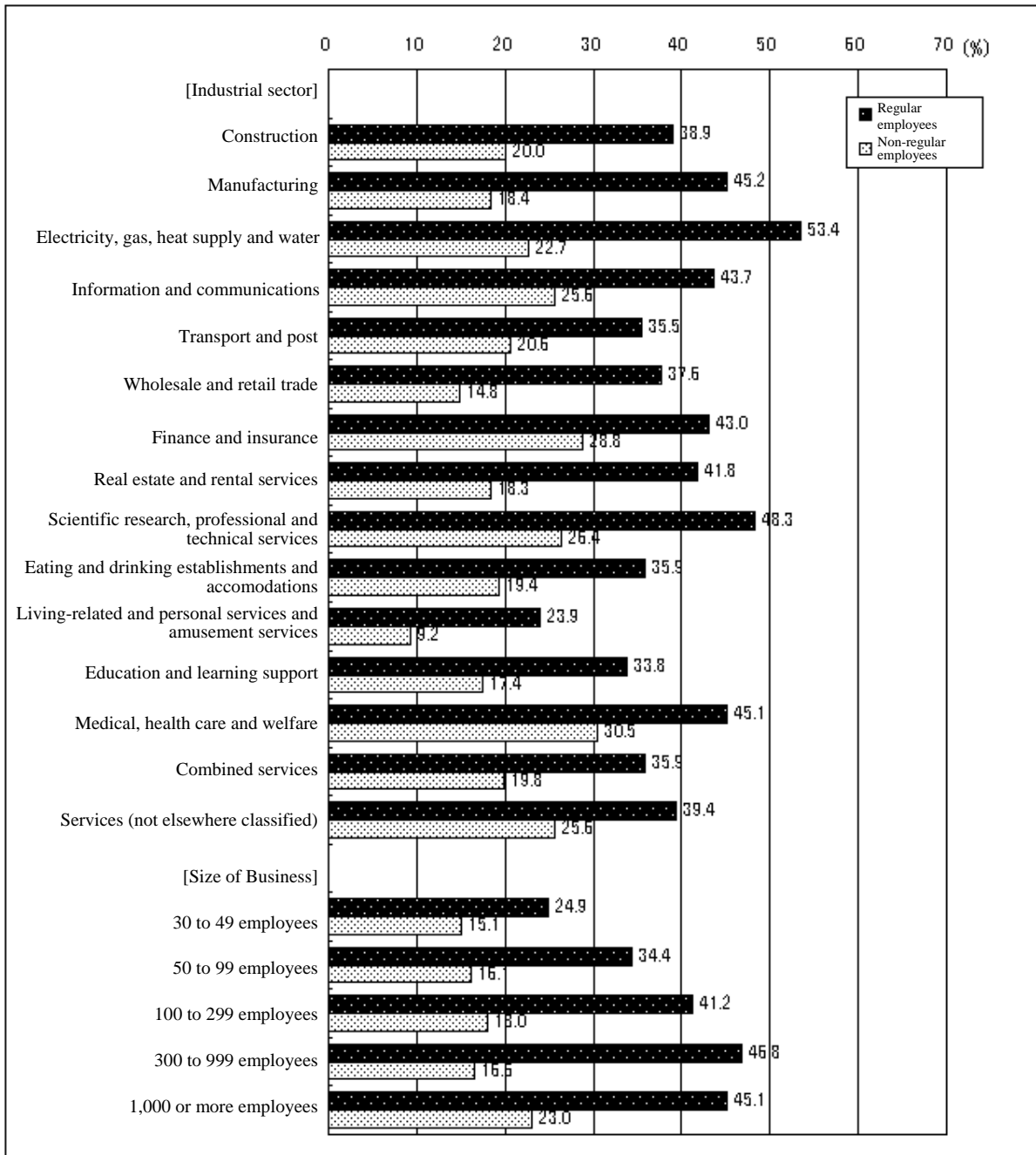


Figure 52 Workers who participated in OFF-JT (categorized by industrial sector and size of business)



3) Nature of OFF-JT attended (Figures 53, 54 and 55)

Concerning the nature of OFF-JT attended (multiple answers allowed), the ratio of regular employees who responded “Management (e.g., enhancement of management and oversight skills)” was the highest at 31.7% (previous survey: 34.7%), followed by “Product quality and safety” at 26.3% (previous survey: 24.6%), “Basic knowledge about business, including business manners” at 26.0% (previous survey: 24.4%), Human resources and labor at 22.7% (previous survey: 21.3%), and “Technology and techniques” at 19.4% (previous survey: 21.7%).

On the other hand, for non-regular employees, the ratio for “Product quality and safety” (29.7% [previous survey: 27.7%]) and “Basic knowledge about business, including business manners” (29.2% [previous survey: 26.8%]) were high, followed by “Sales skills” (21.9% [previous survey: 14.4%]) and “Technology and techniques” (18.8% [previous survey: 21.3%]).

The average total number of hours spent in attending OFF-JT was 39.5 hours, down 2.4 hours from the previous year (previous survey: 41.9 hours) for regular employees, and 21.6 hours (previous survey: 21.3 hours), the longest ever time since this survey was started, for non-regular employees.

Figure 53 Nature of OFF-JT attended (multiple answers allowed)

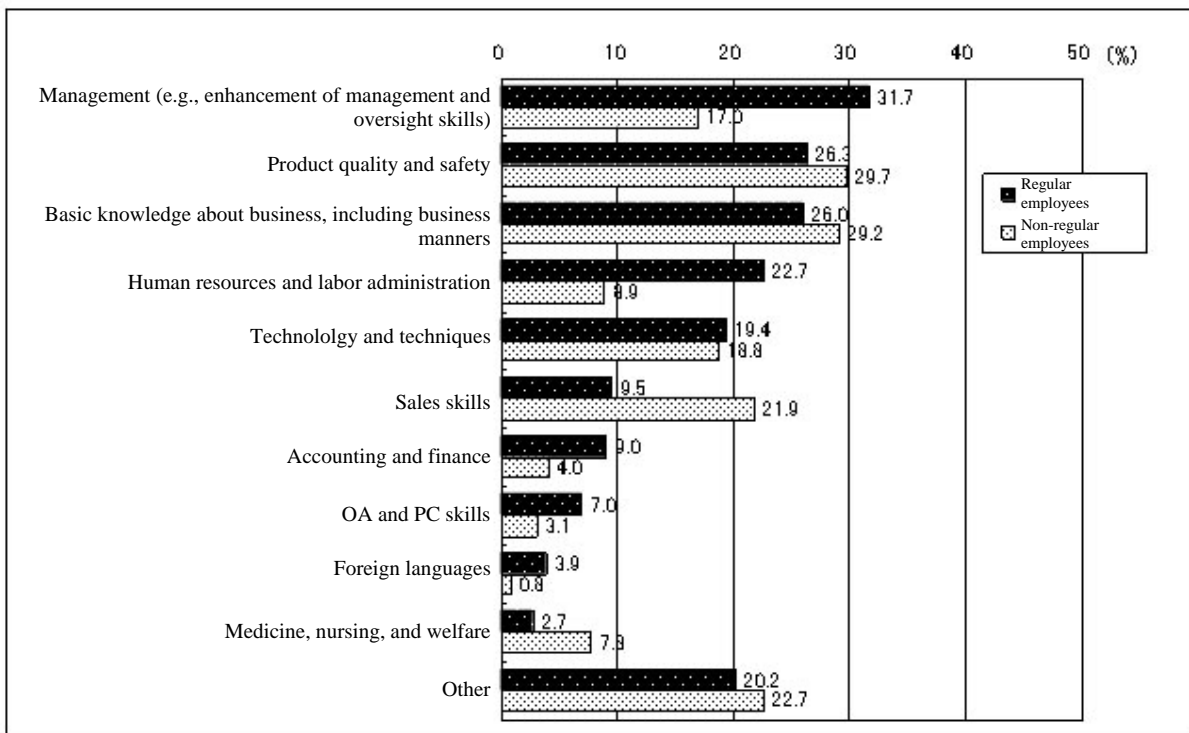


Figure 54 Average total number of hours of OFF-JT attended by workers (total)

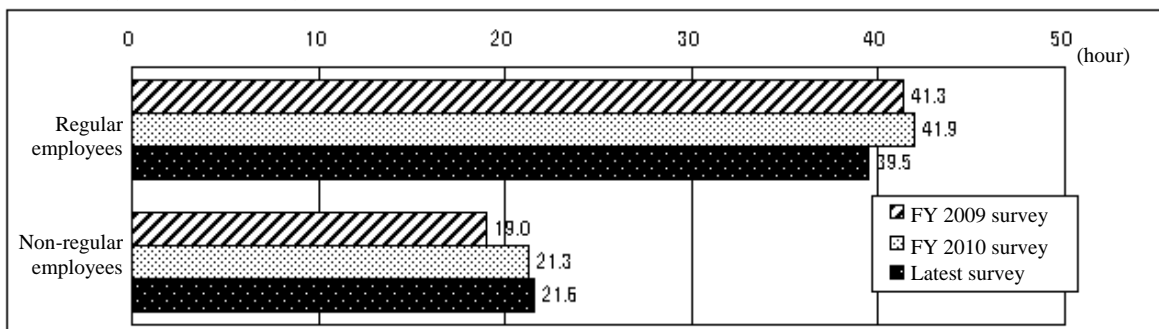
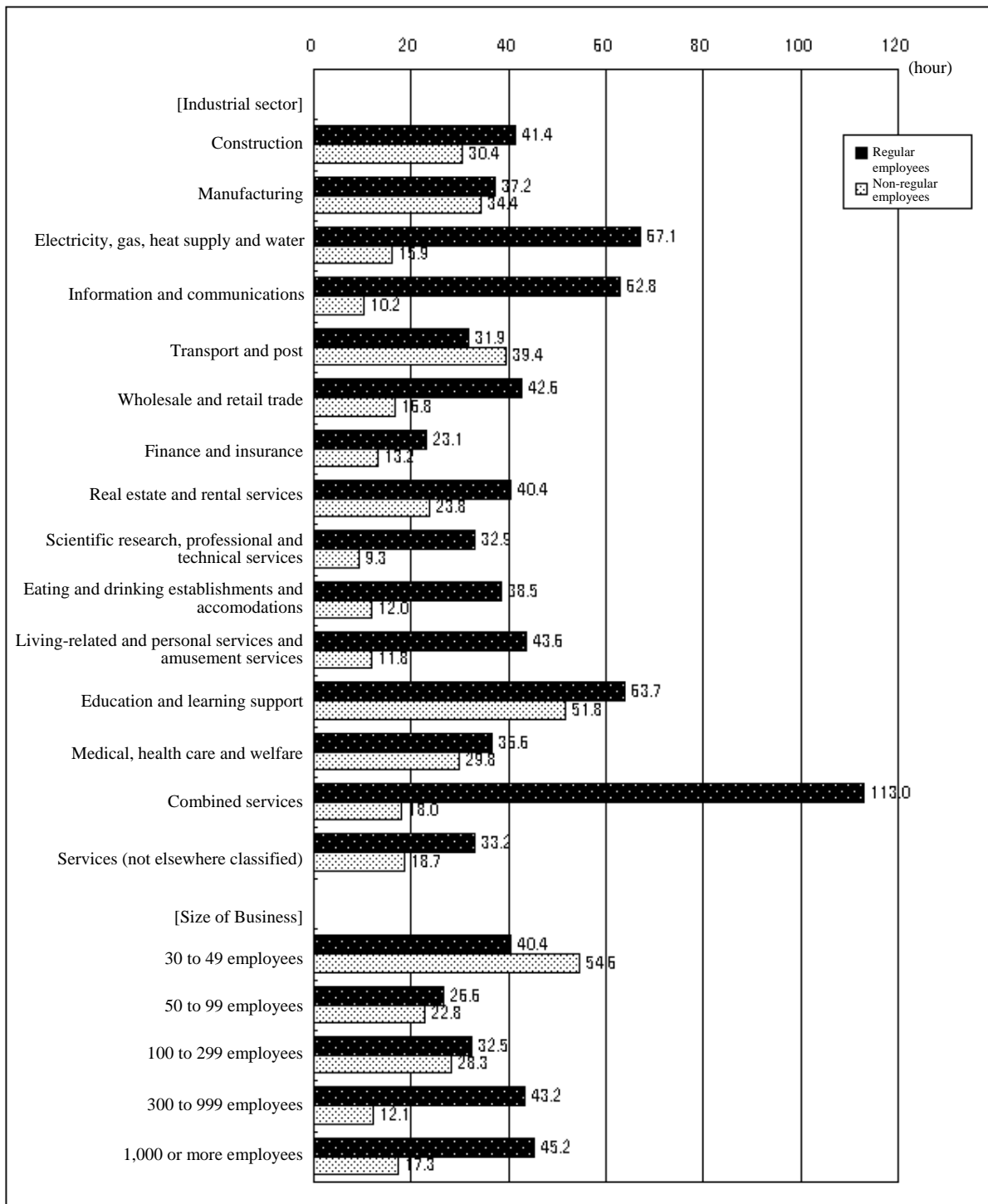


Figure 55 Average total number of hours of OFF-JT attended by workers (categorized by industrial sector and size of business)

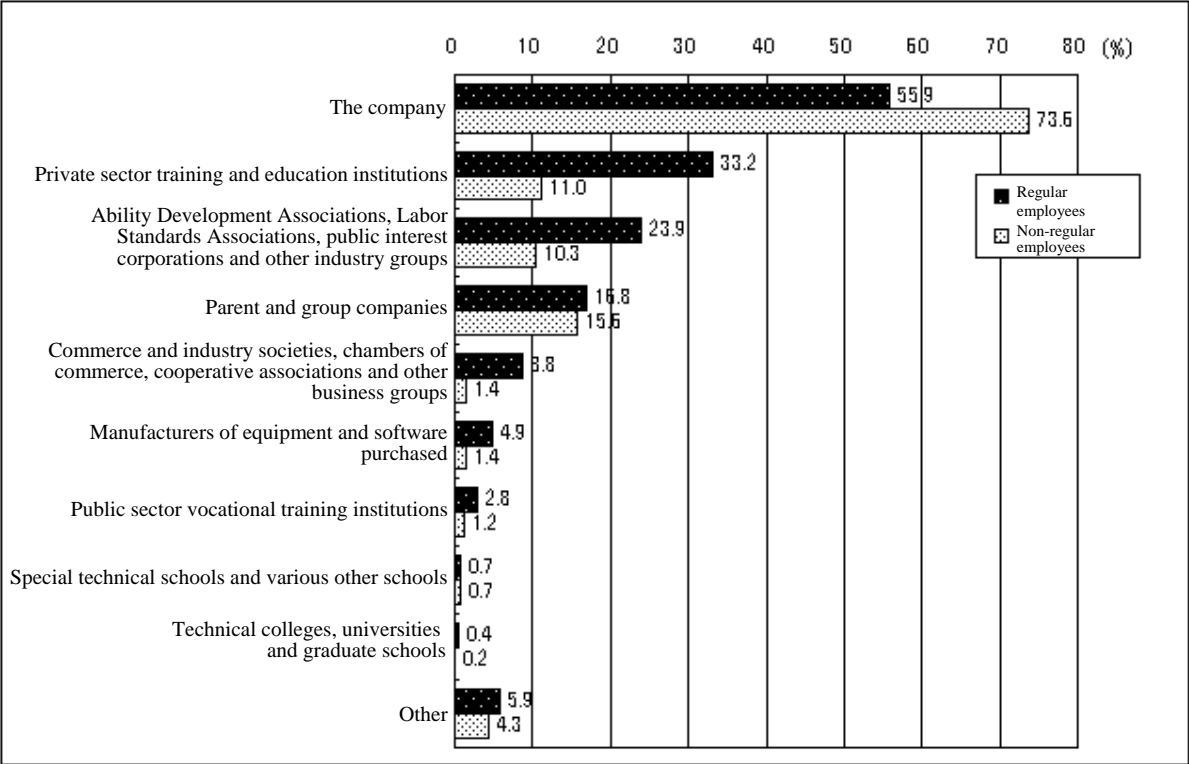


4) Entities that provide OFF-JT (Figure 56)

The entities that provided OFF-JT were as follows (multiple answers allowed): For regular employees, “The company” was the highest at 55.9% (previous survey: 57.4%), followed by “Private sector training and education institutions” (33.2% [previous survey: 33.8%]), and “Ability Development Associations, Labor Standards Associations, public interest corporations and other industry groups” (23.9% [previous survey: 22.1%]), and “Parent and group companies” (16.8% [previous survey: 16.6%]).

On the other hand, for non-regular employees, “The company” was especially high at 73.6% (previous survey: 72.7%), followed by “Parent and group companies” (15.6% [previous survey: 11.2%]), “Private sector training and education institutions” (11.0% [previous survey: 16.3%]), and “Ability Development Associations, Labor Standards Associations, public interest corporations and other industry groups” (10.3% [previous survey: 7.9%]).

Figure 56 Types of training and education institutions for OFF-JT attended (multiple answers allowed)

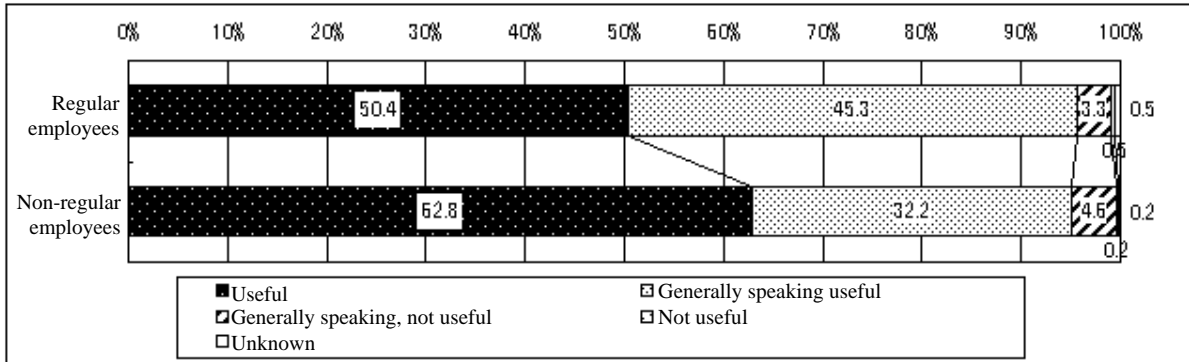


5) Usefulness of OFF-JT attended (Figure 57)

Concerning the usefulness of the OFF-JT attended, 50.4% (previous survey: 45.7%) of regular employees responded that it was “Useful”, and 45.3% (previous survey: 48.2%) responded that it was “Generally speaking, useful”, which represents an overall positive response rate at 95.7% (previous survey: 93.9%).

Similarly among non-regular employees, 62.8% (previous survey: 52.5%) responded that it was “Useful”, and 32.2% (previous survey: 40.9%) responded that it was “Generally speaking, useful”, which represents an overall positive response rate at 95.0% (previous survey: 93.4%).

Figure 57 Usefulness of OFF-JT attended



(2) State of implementation of self-development

1) State of implementation of self-development (Figures 58 and 59)

The ratio of workers who undertook self-development in fiscal 2010 was 43.8% (previous survey: 41.7%) of regular employees and 19.3% (previous survey: 18.4%) of non-regular employees. The ratio of workers who undertook self-development slightly increased from the previous fiscal year for regular employees and remained roughly at the same level for non-regular employees.

The average total number of hours spent in self-development by each worker was 79.8 hours (previous survey: 83.1 hours) for regular employees and 90.5 hours (previous survey: 82.3 hours) for non-regular employees. In comparison with the previous fiscal year, hours decreased for regular employees, while increased for non-regular employees.

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

Figure 58 Workers who undertook self-development

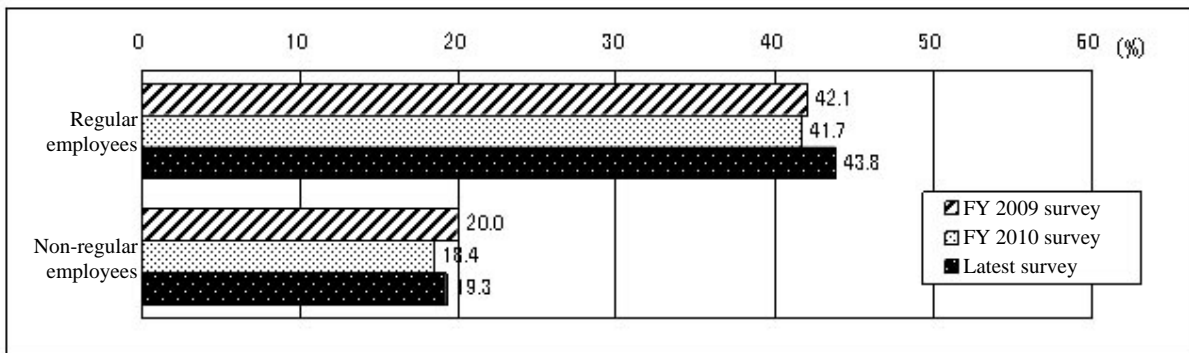
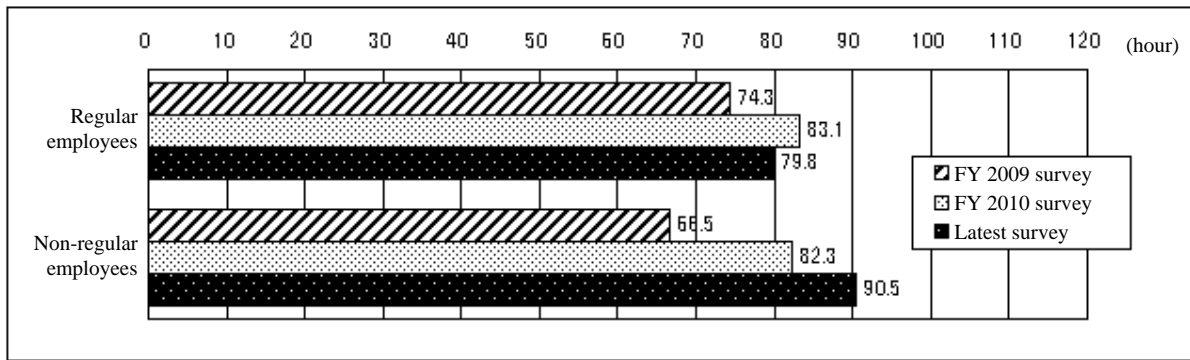


Figure 59 Average number of hours spent for self-development per worker (total)



2) Methods used for self-development (Figures 60 and 61)

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: 49.1%), followed by “Participation in in-house autonomous study groups” (25.2% [previous survey: 25.5%]), “Participation in workshops and seminars at private sector training and education institutions” (21.9% [previous survey: 20.9%]), and “Participation in correspondence learning” (20.8% [previous survey: 19.9%]).

For non-regular employees, “Self-study using radio, TV, textbooks, the Internet etc.” was the highest at 51.6% (previous survey: 39.3%), followed by “Participation in in-house autonomous study groups” (27.2% [previous survey: 30.8%]). These trends were similar to those of regular employees. On the other hand, the ratio of “Participation in correspondence learning” (7.7% [previous survey: 11.2%]) was lower than that for regular employees, at about one-third the level.

In addition, of workers who undertook self-development, the ratio that received assistance with expenses was 38.8% (previous survey: 38.0%) of regular employees and 24.0% (previous survey: 28.2%) of non-regular employees.

Figure 60 Methods used for self-development (multiple answers allowed)

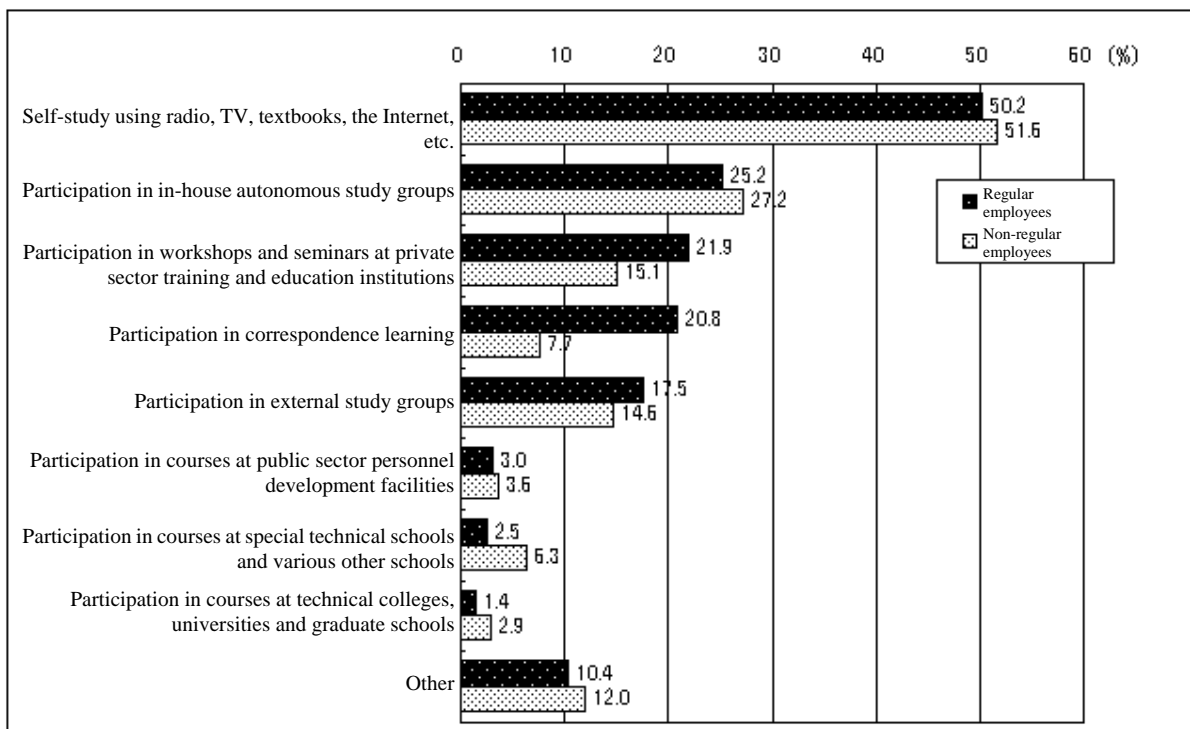
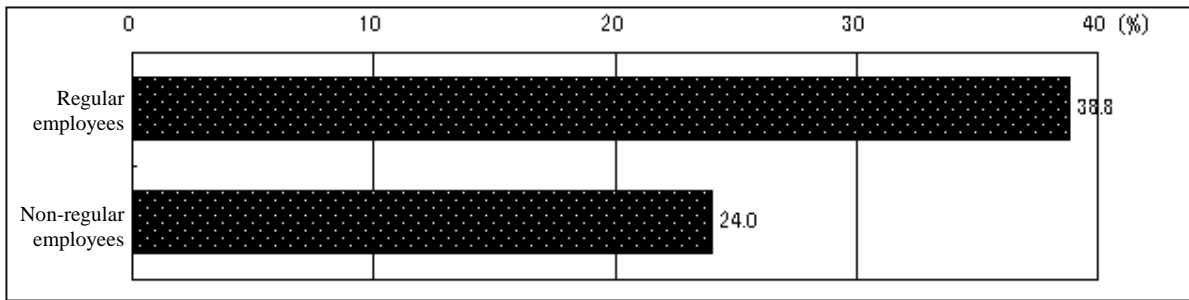


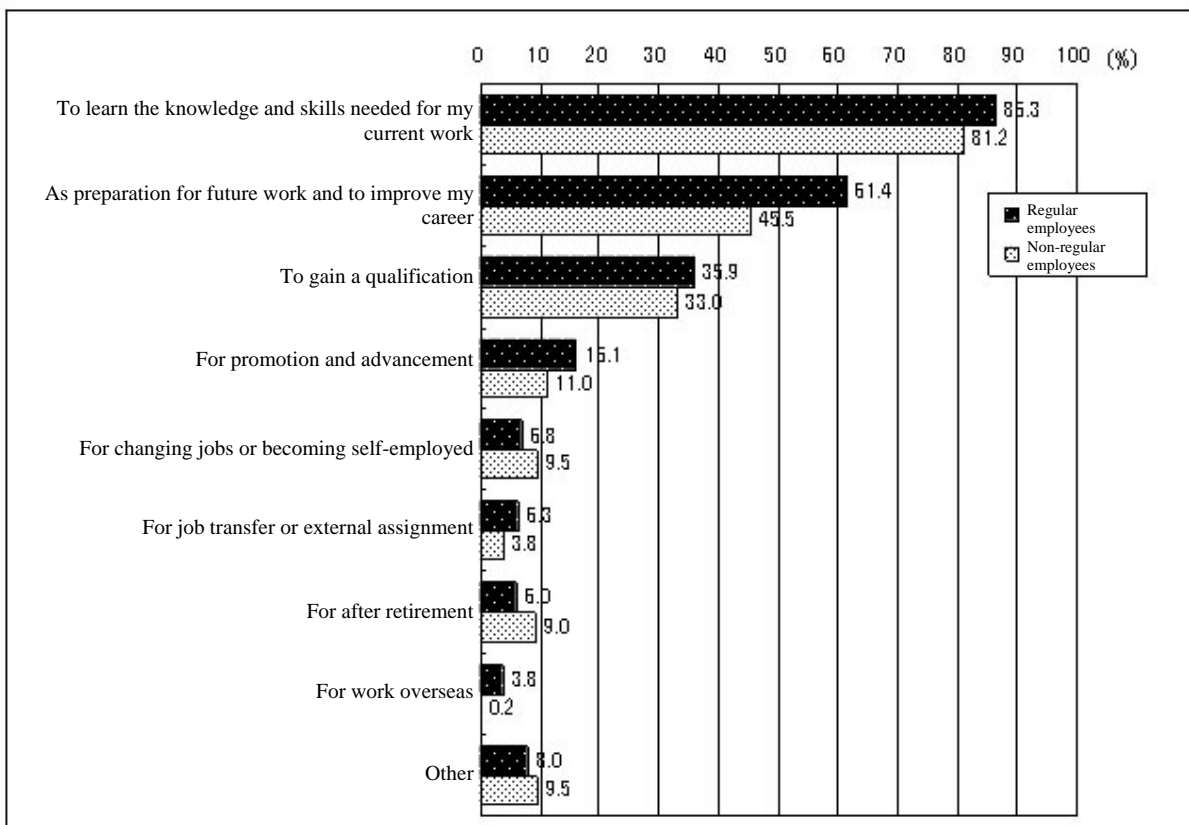
Figure 61 Workers who received assistance with expenses for self-development



3) Reasons for undertaking self-development (Figure 62)

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: 85.1%), followed by “As preparation for future work and to improve my career” at 61.4% (previous survey: 57.4%), and “To gain a qualification” at 35.9% (previous survey: 33.4%). There was a similar trend for non-regular employees, with “To learn the knowledge and skills needed for my current work” at 81.2% (previous survey: 78.4%), “As preparation for future work and to improve my career” at 45.5% (previous survey: 43.2%), and “To gain a qualification” at 33.0% (previous survey: 27.7%).

Figure 62 Reasons for undertaking self-development (multiple answers allowed)



4) Nature of the issues with self-development (Figures 63 and 64)

The ratio of workers who responded that there were issues with self-development was 80.4% (previous survey: 80.9%) of regular employees and 74.2% (previous survey: 75.6%) 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 57.3% (previous survey: 56.1%), followed by “It costs too much” at 33.6% (previous survey: 36.5%). These were further followed by “I’m too busy with family matters and childcare and have no time for self-development” (18.9% [previous survey: 18.1%]), “I don’t know what sort of course is appropriate for the career I’m aiming for” (18.0% [previous survey: 18.0%]) 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 37.6% (previous survey: 36.1%), 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: 30.7%]), “I don’t know what sort of course is appropriate for the career I’m aiming for” (24.3% [previous survey: 18.7%]), and “I don’t know what career I should be aiming for” (20.6% [previous survey: 18.6%]).

Figure 63 Workers who responded that there were issues with self-development

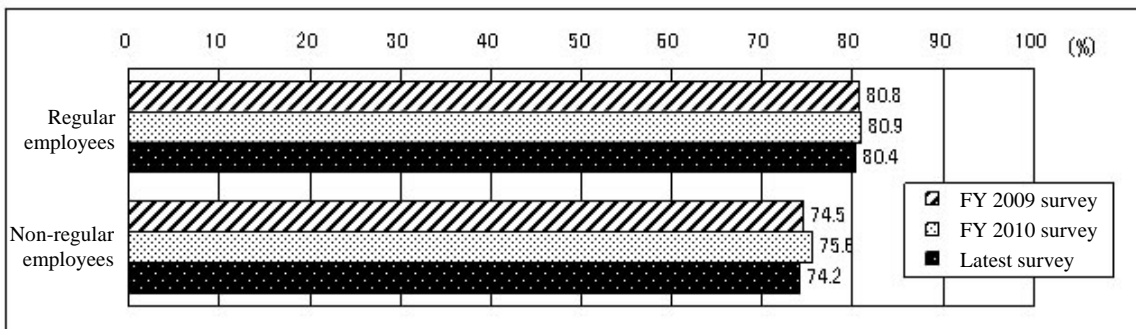
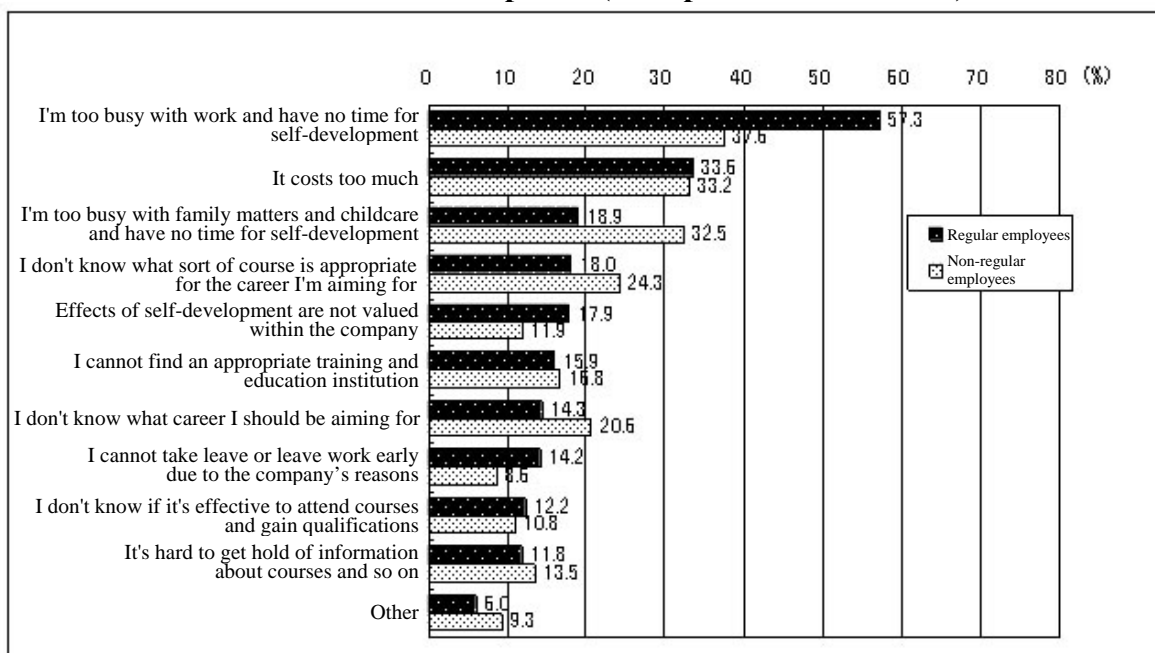


Figure 64 Issues of self-development among workers who responded that there were issues with self-development (multiple answers allowed)



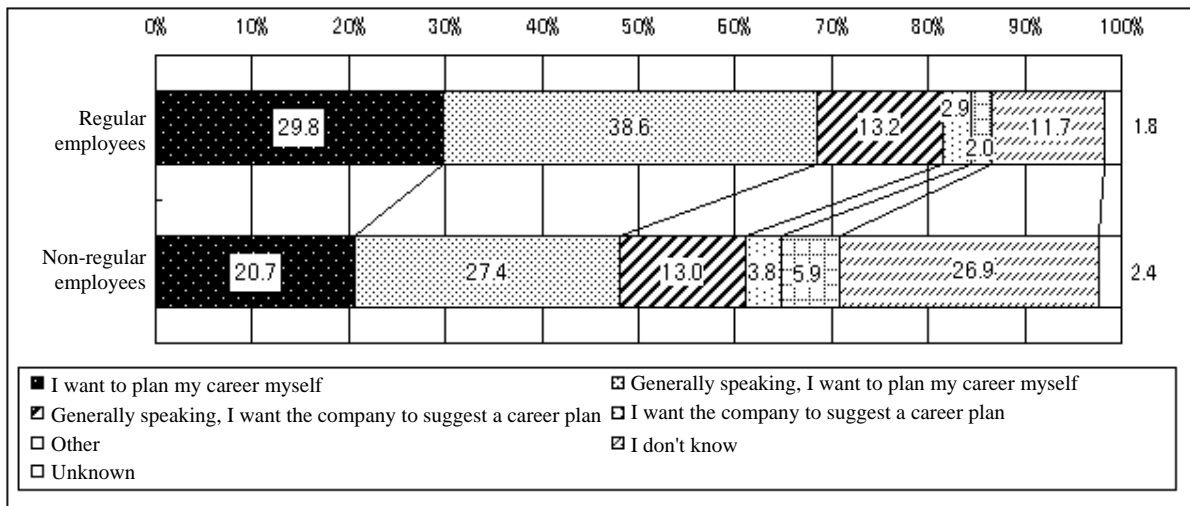
(3) Future career planning (Figure 65)

1) Thoughts on career planning

Concerning wishes of workers with regard to their own career planning, 29.8% (previous survey: 29.3%) of regular employees responded “I want to plan my career myself”, while 38.6% (previous survey: 37.8%) responded “Generally speaking, I want to plan my career myself”. The combined result shows that close to 70% (68.4% [previous survey: 67.1%]) wish to plan their careers proactively.

On the other hand, 20.7% (previous survey: 22.2%) of non-regular employees responded “I want to plan my career myself”, while 27.4% (previous survey: 25.3%) responded “Generally speaking, I want to plan my career myself”, which represents only less than half (48.1% [previous survey: 47.5%]) wishing to plan their careers proactively. The proportion of non-regular employees who responded “I don’t know” was 26.9% (previous survey: 29.1%), more than double the figure for regular employees (11.7% [previous survey: 14.5%]).

Figure 65 Attitude towards career planning

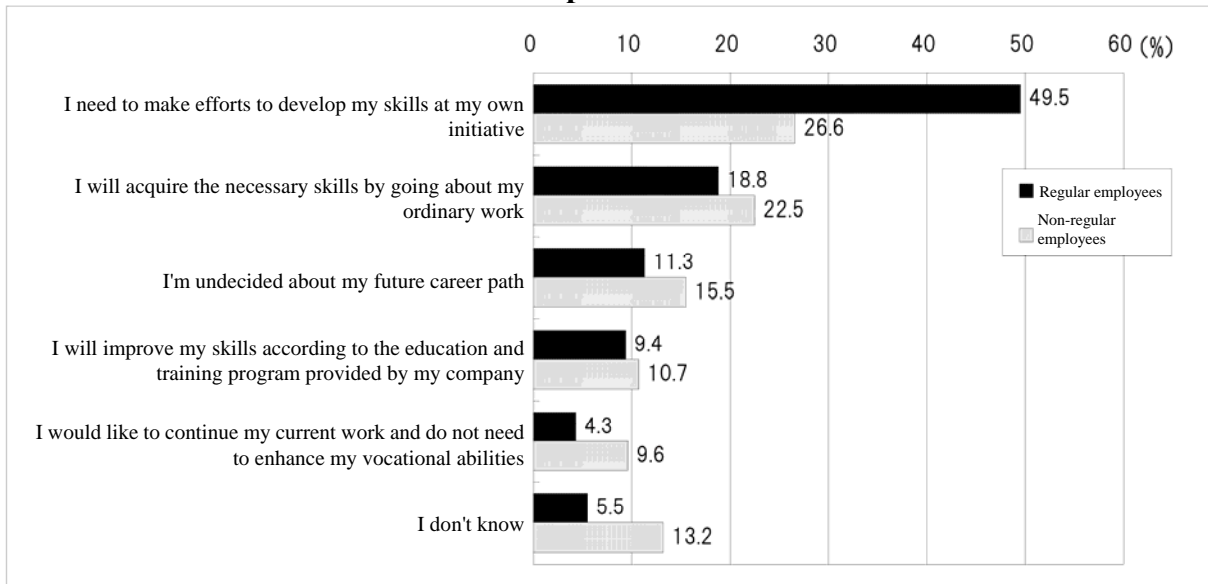


2) Conditions necessary for career improvement (Figure 66)

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 49.5% (previous survey: 46.0%), followed by “I will acquire necessary skills by going about my ordinary work” at 18.8% (previous survey: 19.7%), though the gap is substantial at about 30 points.

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 26.6% (previous survey: 26.7%), 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” (22.5% [previous survey: 22.8%]), indicating trends differing from those for regular employees.

Figure 66 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) New employee
An employee who has been working at the company for approximately three or less years.
- (10) Mid-career employee
An employee who does not fall under the categories of management and new employee.

- (11) Management
A person who is responsible for management or supervision.
- (12) Leave system for education and training
Leave that can be used by a worker for education and training.
- (13) Job card system
A system in which job seekers who have little regular employee experience, with a view to becoming regular employees, through career consultations at Hello Works (Public Employment Security Offices), Job Cafes, etc. based on the “Job Card” which contains information on the person’s job history, educational background, history of training, acquired licenses and certifications, etc., receive practical vocational training (vocational ability development program) that combines practical learning at enterprises and lectures at education and training institutions, etc. The person is then given an evaluation sheet after the completion of the training which will be incorporated into the Job Card for utilization in job seeking activities and career development.
- (14) 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.
- (15) Career consulting
Consultations to enable an employee 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. It is also sometimes called career counseling, etc.
- (16) Career consulting system
An arrangement of some sort for assigning career consultants to provide opportunities for career consulting (or career counseling) as noted above, for partnering with specialized agencies, etc.
- (17) 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.
- (18) Self-reporting system
A system for reporting the wishes of each worker to the company concerning skills development, personnel transfers, and other items.
- (19) 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.
- (20) 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.
- (21) 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.
- (22) 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”.
- (1) Tasks
- 1) Management work

Management work at the level of the division head (or equivalent) or above.
 - 2) Specialized and technical work

A person who is engaged in 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.

(24) 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.