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**Fewer Children,
More Customers?
Japan's Supplementary Education System**

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Thanks

Presentation is Japan premiere

Two Parallel and Interacting Global Developments

Declining Birthrates

- Common to OECD countries
- Japan ahead of trend, 2008 fertility rate 1.22 (USA: 2.1, Alaska: 2.3)

Education Markets

- “Nation at Risk”
- Reagan-Thatcher deregulation
- Market mechanism as solution
- School choice, vouchers, charter schools, etc.

Supplementary Education in Japan

“Juku” (塾) “cram schools” “shadow education”

- academic subjects, hobbies, lifelong learning
- afternoon and weekend sessions
- academic: remedial and accelerated

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Academic juku shadow official curriculum closely

The Genesis of Supplementary Education

- Some historical antecedents, but...
- Emphasis placed on education, but...
- High stakes testing, but...

Combination of factors in early 1970s

(economic, demographic, socio-structural)

Institutionalization

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Academic Juku Today

- No precise data on numbers or attendance
- Estimates: 50,000 schools (≈320 students/□)
- Attendance 25-100%, by grade and region
- 35+ research visits to owner-operated juku, mostly Tokyo, but also Kansai, Hiroshima, Shimane Prefecture

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No reliable numbers, partly because of lack of regulation

Huge market, increasingly dominated by corporate (chain and franchise) juku

Emphasize that I am examining a particular segment of this market

Juku: Fully Marketized

- For-profit, many different organizational forms
- No entry barriers
- Voluntary participation
- High student mobility in urban areas
- Consumer information

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Juku advocates follow advocacy for marketization world-wide:

- for-profit is more responsive to children
- threat of withdrawal keeps teachers on their toes
- conversely, students also kept on their toes (bullying)

Market Developments

- Increasing dominance of corporate juku since mid-1990s
- Owner-operated juku enrolment peaked in 1995, now half
- Massive technology investments

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Corporate dominance:

- economic
- geographic (transportation hubs)
- lobby emerging

Demographic Trends

- Birthrates: below replacement since 1970s
- Ageing: 20% of population older than 1965
- Internal migration: growth of urban areas, rapid rural depopulation
- Immigration: re-migration

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Japan very densely populated, especially given small habitable area.

Population approx. 127mio, extrapolation – 25% by 2050

Total fertility below 2 and thus significantly below replacement (2.1) since late 1970s, very common trend across developed economies, Korea even lower. Real estate prices, economic uncertainty, availability of contraception, rising age at first birth

Ageing: rising rapidly, long life expectancy (85/78), Japan ahead of curve in many developed countries, partly because baby boom and echo boom were somewhat less pronounced

Re-migration: 500,000 S American Nikkei

Juku Responses to Demographic Shift

- Disappearance of options in the countryside
- Individual tutoring
- Greater variety of delivery methods
- Few new juku, successor problems
- Export markets

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Note perception shift associated with rise of individual tutoring

Supplementary Education World-Wide

- High institutionalization in East Asia, but also Egypt, France, Greece, Kenya, India, Turkey
- Immigration patterns
- Appearance/rise across OECD countries
- U.S.: No Child Left Behind

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Very little curricular diversity

Very little evidence of effectiveness

Interacting Global Trends

- Demography + individual responsibility = increased personal investment in education
- Rise of supplementary education
- Decline of “official curricula”
- Rising inequality (SES and geographic)