
Preface

The Japan Foundation was established in October 1972 as a special legal entity and as an organization to comprehensively implement international cultural exchange projects in all of the regions of the world, and in October 2003 it was reorganized as an independent administrative institution supervised by the Ministry of Foreign Affairs. Currently, based in the Tokyo Headquarters, the Kyoto Office, two affiliated institutes (the Japanese-Language Institute, Urawa, and the Japanese-Language Institute, Kansai), and 25 overseas offices in 24 countries, the Japan Foundation is collaborating with external organizations to carry out activities in three fields: art and cultural exchange, Japanese-language education overseas, and Japanese studies and intellectual exchange abroad.

In the field of Japanese-language education overseas, the Japan Foundation is cooperating with the relevant domestic institutions, the governments of the target countries, and Japanese-language educational institutions in each country and region, while developing the Japanese-language education environment overseas in the form of dispatching Japanese-language education experts abroad, providing training to Japanese-language teachers abroad, and supporting and networking Japanese-language educational institutions through projects it organizes, co-organizes, or subsidizes. The Japan Foundation also contributes to building a shared infrastructure that can be utilized by learners around the world through the provision of Japanese-language teaching methods and learning materials overseas and the enhancement of the evaluation of the proficiency of Japanese-language learners.

In order to confirm the current state of Japanese-language education in each country and region, which forms the foundation for this range of activities, this report summarizes the results of the Survey on Japanese-Language Education Abroad conducted by the Japan Foundation in FY2018. We hope that sharing the results of the survey will serve as a reference for the institutions and people involved in Japanese-language education in Japan and abroad and thereby provide a boost to Japanese-language education.

Finally, we received the wonderful cooperation of the Japanese-language educational institutions who answered the survey and also the Ministry of Foreign Affairs and the relevant institutions and relevant people in each country at each stage of the survey from distribution to collection of the survey form. We would like to express our deep appreciation for this, and we would like to take this opportunity to express our deep respect to all of the people who are involved in the front line of Japanese-language education daily in regions throughout the world, and who are making tremendous efforts to maintain and develop it.

August 2020
The Japan Foundation

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About this survey

1. Overview of survey implementation

(1) Survey objective

The objective of this survey is to ascertain the current state of Japanese-language education, and provide useful materials mainly regarding the following three points:

- (i) Basic materials for the conducting of surveys and research regarding Japanese-language education;
- (ii) Reference materials to assist institutions involved Japanese-language study, and international exchange organizations in the implementation of various types of projects related to Japanese-language education;
- (iii) Reference materials for the information exchange, mutual exchange, and network formation of

institutions and organizations involved in Japanese-language education.

The results of this survey are provided in this report and are also available as “Search engine for institutions offering Japanese-language education” on the website of the Japan Foundation.

The Japan Foundation has been conducting surveys regarding institutions involved in Japanese-language education since 1974, taking over from the previous surveys by the Ministry of Foreign Affairs. The major surveys that have been implemented by the Japan Foundation and the Ministry of Foreign Affairs are as shown below.

The main past Japanese-language educational institutions surveys

| Organization implementing the survey | Survey year | Survey results report |
|--|-------------|---|
| Ministry of Foreign Affairs, Agency for Cultural Affairs | 1970 | List of Institutions involved in Japanese-Language Education Worldwide Published by the Publishers Association for Cultural Exchange (PACE), Japan (1970.11) |
| Japan Foundation | 1974-1975 | List of Institutions involved in Japanese-Language Education Abroad Published by the Japan Foundation (1975.12) |
| Japan Foundation | 1979-1980 | List of Institutions involved in Japanese-Language Education Abroad Published by the Japan Foundation (1981.6) |
| Japan Foundation | 1984-1985 | List of Institutions involved in Japanese-Language Education Abroad Editorial supervision by the Japan Foundation Published by Bonjinsha (1987.3) |
| Ministry of Foreign Affairs | 1988-1989 | Japanese-Language Education: Its Growth and Concerns Edited and published by The Japan Forum (1990.3) |
| Japan Foundation Japanese-Language Institute, Urawa | 1990 | Survey Report on Japanese-Language Education Abroad Edited by the Japan Foundation Japanese-Language Institute, Urawa Published by the Ministry of Finance Printing Bureau (1992.8) |
| Japan Foundation Japanese-Language Institute, Urawa | 1993-1994 | Survey Report on Japanese-Language Education Abroad Edited and published by the Japan Foundation Japanese-Language Institute, Urawa (1995.3) |
| Japan Foundation Japanese-Language Institute, Urawa | 1998-1999 | Survey Report on Japanese-Language Education Abroad Edited and published by the Japan Foundation Japanese-Language Institute, Urawa (2000.3) |
| Japan Foundation | 2003-2004 | Survey Report on Japanese-Language Education Abroad Edited and published by the Japan Foundation (2005.3) |
| Japan Foundation | 2006-2007 | Survey Report on Japanese-Language Education Abroad Edited and published by the Japan Foundation (2008.7) |
| Japan Foundation | 2009-2010 | Survey Report on Japanese-Language Education Abroad Edited and published by the Japan Foundation (2011.3) |
| Japan Foundation | 2011-2012 | Survey Report on Japanese-Language Education Abroad Edited by the Japan Foundation Published by Kuroshio Publishers (2013.10) |
| Japan Foundation | 2015-2016 | Survey Report on Japanese-Language Education Abroad Edited and published by the Japan Foundation (2017.3) |

(2) Survey coverage

A. Institutions covered by the survey

This is a survey of institutions that can implement Japanese-language education abroad and institutions that can implement Japanese-language education inside Japan with public institutions abroad as the establishing entity. The following are not included in the survey coverage:

- (i) Organizations (activities) that do not have substantial form as organizations;
- (ii) Japanese schools for the children of Japanese living overseas;
- (iii) Broadcast stations and website administrators offering Japanese-language education to the general public;
- (iv) Short-term Japanese-language experience activities;

B. Number of survey forms distributed and collected

This survey is a questionnaire survey for which the survey items were translated into each language and the survey was distributed and collected as a survey form using survey methods tailored to the communications environment of each country such as the Internet, e-mail, fax, post, telephone, etc.

For fiscal2018, the survey forms were distributed to 26,482 institutions all around the world, and answers were received from 23,136 institutions (a collection rate

of 87.3%). We were thus able to confirm that 18,611 institutions are implementing Japanese-language education, and that 4,475 institutions are not implementing Japanese-language education.

C. Countries covered by the survey

This survey was implemented for all surveyable countries and regions around the entire world. North Korea is not covered by the survey.

(3) Survey period

The survey form distribution and collection period: May 2018–March 2019

Note that the survey period was extended to July 2019 for some countries that had not finished the survey during the above period.

(4) Survey content

Twenty versions of the survey form were prepared: Japanese, Arabic, Chinese (simplified Chinese version, traditional Chinese version), English (United Kingdom version, United States version), French, German, Hungarian, Indonesian, Italian, Khmer, Korean, Portuguese, Russian, Spanish (Spain version, Latin America version), Thai, and Vietnamese.

The main survey items are as shown below.

Main survey items (survey form, Japanese-language sample P92)

| Type | Survey items |
|---|--|
| Basic information about the institutions | Institution name, Japanese-language education department name, address, contact info |
| Nature of the institutions | Establishing entity (public institutions/private institutions/institutions associated with the Government of Japan), educational stage (Primary school/Secondary school [divided into lower secondary institutions, upper secondary institutions]/institutions of higher education/institutions in non-school education), the position of Japanese-language courses (example: at an institution of higher education, as a major/not as a major/Extra curricular) |
| Learners | The number of Japanese-language learners (breakdown by educational stage) (“Non-school education” only) Attributes of the Japanese-language learners (preschool age children/primary educational stage/lower secondary educational stage/upper secondary educational stage/higher educational stage/other adults) |
| Teachers | The number of teachers, the number of Japanese-language teachers who are native speakers, whether or not there are Japanese-language teacher-training courses |
| University degrees | (“School education at the higher educational stage” only) Whether or not the teachers have been conferred university degrees (associate degree/bachelor’s degree/Master’s degree/Doctorate/have not been conferred a university degree) |
| Your objective and reasons for learning the Japanese language | Choose from items such as “interest in Japanese culture (e.g., history, literature, arts)” etc. (multiple answers allowed) |
| Implementation status of Japanese-language education | Evaluation of items such as “the number of teachers available to learners,” etc. in four grades |

(5) Survey method

A. Survey implementation

Distribution and collection of the survey form were carried out by the Japan Foundation offices abroad and the Japanese embassies and consulates in each country and

region. Note that in the following countries and regions, taking into consideration the efficiency of the survey, the survey was implemented jointly with external institutions or subcontracted to external institutions inside each country and region.

Joint implementation partners and subcontractors

| Country and region | Joint implementation partners and subcontractors |
|--------------------|---|
| China | Tianjin Foreign Studies University |
| Taiwan | J-Study |
| Hong Kong, Macao | Society of Japanese-Language Education, Hong Kong |
| Mongolia | Mongolia Japanese-language Teachers' Association |
| Myanmar | Myanmar Association of Japan Alumni (MAJA) |
| New Zealand | Massey University |
| Cambodia | Cambodia–Japan Cooperation Center |
| Russia | Central Federal District: Litera LCC Volga Federal District, Southern Federal District, North Caucasian Federal District: "Literus" Language Center Ural Federal District: "Yume" Japanese-Language Center Siberian Federal District: Siberia-Hokkaido Culture Center Far Eastern Federal District: License Academy Co., Ltd. |

Even outside the above countries and regions, cooperation was obtained from many institutions, such as local Japanese-language teachers' associations, as well as from individuals.

B. Survey form distribution and collection method

For this survey we distributed and collected the survey forms using survey methods tailored to the communications environment in each country, including Internet survey forms, e-mail, fax, post, and telephone, etc., based on the information about Japanese-language educational institutions previously ascertained by the Japan Foundation and diplomatic missions abroad in each

country and region. The survey method was not limited to one method for one country or region; in some cases we used a combination of multiple survey methods tailored to the communications environments in each of the countries and regions.

Note that in this survey 60.68% of the respondents used the Internet, whereas fewer than 1% used fax or the post, respectively.

Survey method

| Survey method | Procedure | Use rate |
|-----------------|--|----------|
| Internet | The person-in-charge in each country and region notified the institutions covered by the survey of the URL of the dedicated website for the survey by e-mail and also sent them IDs and passwords. The institutions covered by the survey that received IDs and passwords accessed said website and entered the answers there. | 60.68% |
| E-mail | The person-in-charge in each country and region sent the survey form as electronic data to the institutions covered by the survey by e-mail. The institutions covered by the survey entered the answers in the electronic survey form, attached the form to an e-mail, and returned it to the institutions implementing the survey. | 3.61% |
| Fax | The person-in-charge in each country and region sent the survey form to the institutions covered by the survey by fax. The institutions covered by the survey entered the answers in the survey form and returned it to the institutions implementing the survey by fax. | 0.02% |
| Post | The person-in-charge in each country and region sent the survey form to the institutions covered by the survey by post. The institutions covered by the survey entered the answers in the survey form and returned it to the institutions implementing the survey by post. | 0.67% |
| Telephone, etc. | The person-in-charge in each country and region obtained the answers from the institutions covered by the survey by telephone or by receiving them by hand. | 35.02% |

2. Definitions of terms and method of notation in this survey

(1) The classifications and arrangement of the regions and the names and arrangement of the countries and regions used in this document

A. Classifications and arrangement of the regions

There are 12 regional classifications: East Asia, Southeast Asia, South Asia, Oceania, North America, Central America, South America, Western Europe, Eastern Europe, Middle East, North Africa, and Africa.

B. Names and arrangement of the countries and regions

The names of the countries follow the notation in the Japanese language used by the Japan Foundation (informal notation), and they are arranged in the order of the Japanese syllabary for each region.

The following regions that are not countries are referred to using their informal names (from World Yearbook 2019 by KYODO NEWS). Furthermore, Taiwan, Hong Kong, and Macao are presented separately from China.

- Northern Mariana Islands
- French Polynesia
- Guam
- Hong Kong
- Macao
- New Caledonia
- Puerto Rico
- Taiwan

Note that in this text for the sake of convenience the use of the term “countries” includes these regions.

(2) About the terms used in this text

A. “Institutions” used as a unit

In this survey, the Japanese-language courses, etc., being implemented in each faculty or separate campus in a comprehensive university are regarded as organizations that each have independence to a certain extent; therefore, there are institutions in the survey for which “faculty” and “campus” units are considered to be “one institution.”

B. Educational stage

The school educational system and school structure vary depending on the country; therefore, classifications that unify the entire world are difficult, but in this report, the institutions covered by the survey are classified into the following four categories to carry out the tabulation and

analysis.

(A) “Primary education”

This refers to institutions equivalent to elementary schools in Japan.

(B) “Secondary education”

The tabulation and analysis are carried out using the two sub-classifications of institutions equivalent to middle schools in Japan (Lower secondary) and institutions equivalent to high-schools in Japan (Upper secondary).

(C) “Higher education”

This refers to institutions equivalent to the junior colleges, technical colleges, universities, and graduate schools of Japan. It also includes TAFE (Technical and Further Education) in Australia, and university preparatory education (preparatory courses) in Malaysia, France, etc.

(D) “Non-school education”

This includes private language schools, lifelong educational institutions run by public institutions, Japanese-language schools for children of people of Japanese ancestry, language courses run by higher educational institutions for the general public, Japanese-language courses for the general public run by the Japan Foundation, in-house education offered by private companies and public institutions for their employees, heritage language education, institutions that send technical interns to Japan, etc.

(In this report “Other Education” in the survey form [P92, P95] is rephrased as “non-school education.”)

C. Institution establishing entity

“Establishing entity” means the establisher of the institution, and institutions are classified into the following three types:

(A) Public institutions

Institutions established by a country, a state, a province, a local government, etc.;

(B) Private institutions

Institutions established by private organizations or individuals;

(C) Institutions associated with the Government of Japan
Institutions established by organizations associated with the Government of Japan, such as the Ministry of Foreign Affairs, the Japan Foundation, etc.

D. Teachers

(A) Teachers

This refers to teachers who are teaching the Japanese language at an institution regardless of whether or not they are employed full-time at that institution or whether or not they work at other institutions as well. The number of teachers in each of the tabulations is the total number calculated by simply adding up the number of teachers at each Japanese-language educational institution; for convenience we count in duplicate in the case of a teacher who is teaching at multiple institutions.

(B) Japanese-language teachers who are native speakers
Teachers who are teaching the Japanese-language whose native language is Japanese

E. Other special terms

In this text and in the spreadsheets, annotations are added as needed.

F. Notation method used in this report

(A) The figures in the tabulations are rounded to one decimal place. Therefore, sometimes the totals of the percentages do not add up to 100%.

(B) In the case of survey items that ask for two or more answers (multiple answers), sometimes the total of the percentages exceeds 100%.

(C) The n shown in the graphs is the cardinal number (sample size) used in the calculation of the ratios.

G. Regarding the notation for the options, we use the abbreviated expressions shown below when notating the options for “Japanese-language learning objectives and reasons” (hereinafter referred to as the “objectives of Japanese-language learning”) in the graphs and text.

Objectives of Japanese-language learning

| Notation of the options in the survey form | Abbreviated expression |
|---|---|
| 1. Interest in Japanese culture (e.g., history, literature, arts) | Interest in history, literature, arts, etc. |
| 2. Interest in Japanese popular culture (e.g., anime, manga, J-POP, fashion) | Interest in anime, manga, J-POP, fashion, etc. |
| 3. Interest in Japanese politics, economy, and/or society | Interest in politics, economy, and/or society |
| 4. Interest in Japanese science and/or technology | Interest in science and/or technology |
| 5. Interest in the Japanese language | Interest in the Japanese language |
| 6. To take an entrance exam in Japanese/to earn a certificate | Use Japanese to take an exam/earn a certificate |
| 7. To study in Japan | Study in Japan |
| 8. To gain employment/to fulfill future work aspirations using Japanese language skills | Future employment/work aspirations |
| 9. Japanese is necessary for current work/Japanese will be useful in current work | Necessary for current work |
| 10. To visit Japan for sightseeing | Sightseeing in Japan |
| 11. To participate in an international goodwill program (visit Japan or host Japanese visitors) | Goodwill programs and exchanges with Japan |
| 12. For online information gathering/communication in Japanese | Information gathering/communication in the Japanese-language |
| 13. To speak Japanese at work, school, or in the community | Speaking Japanese at work, school, or in the community |
| 14. Have a broad interest in understanding other cultures and cross-cultural communication | Understanding other cultures and cross-cultural communication |
| 15. Japanese is the mother language/the language of family or relatives | Mother language or heritage language |
| 16. Recommended by others (e.g., family, relatives, friends) | Recommendation of family, relatives, etc. |
| 17. Other than 1 through 16 listed above | Other |

* About Japanese-language education information other than this survey

The Japan Foundation also engages in activities other than this survey to gather information about and ascertain the status of Japanese-language education overseas, and publishes the following information on its website.

Japanese-language education: Information by country and region

This section of the website compiles information about Japanese-language education throughout the world by country and region, and updates information about the status of implementation of Japanese-language education, educational systems, the teaching materials used, etc. once a year (Japanese text only, excluding the year in which this survey is implemented).

<https://www.jpff.go.jp/j/project/japanese/survey/area/index.html>

Information from the front line of Japanese-language education around the world

The reports by the Japanese-Language Senior Specialists, Japanese-Language Specialists, and Japanese-Language Assistants that the Japan Foundation dispatches to core Japanese-language educational institutions in regions throughout the world are updated once a year, and they present authentic advice about the development of the overseas Japanese-language education environment, Japanese-language teaching in classrooms, and the creation of curricula and teaching materials, and authentic views about the training of local teachers, the construction of teachers' networks, etc (Japanese text only).

<https://www.jpff.go.jp/j/project/japanese/teach/dispatch/voice/voice.html>

Research into Japanese-language education

In addition to the Japanese-Language Education Bulletin published by the Japan Foundation, we present research materials such as the various types of survey reports, etc. we have released in the past.

<https://www.jpff.go.jp/e/project/japanese/teach/research/index.html>

Japanese-Language Proficiency Test (JLPT) statistical data

The Japanese-Language Proficiency Test (JLPT) is jointly organized by the Japan Foundation and Japan Educational Exchanges and Services twice a year inside Japan and overseas. We publish data on the number of applicants, the number of test-takers, the average scores, etc. for each level of the JLPT in each country and region where the test is implemented.

<https://www.jlpt.jp/e/statistics/index.html>

Chapter 1 Overview of the results of the survey

1. Overall situation

It was discovered that Japanese-language education is being implemented in 142 countries and regions around the world, a record high

The number of institutions, number of teachers, and number of learners of the Japanese-language have all increased

In the fiscal2018 survey, the implementation of Japanese-language education overseas was confirmed in 142 countries and regions, an increase of 4 countries and 1 region from the 137 countries and regions in the fiscal2015 survey. The result of this is that the number of countries and regions in which implementation of Japanese-language education has been confirmed is at a record high since the survey was begun in 1974.

The number of institutions involved in Japanese-language education overseas (hereinafter referred to as the “number of institutions”) is 18,661 institutions (up 15.3% compared to the previous survey); the number of Japanese-language teachers (hereinafter referred to as the “number of teachers”) is 77,323 people (up 20.6% compared to the previous survey); and both of these figures are a record high. The number of Japanese-language learners

(hereinafter referred to as the “number of learners”) is 3,851,774 people (5.4% up compared to the previous survey), which is an increase of approximately 200,000 people from the previous survey, which had recorded the first decrease since the commencement of the survey.

Note that this survey covers “institutions implementing Japanese-language education in language studies” and all of the figures are the actual figures calculated by tabulating the answers in the survey forms submitted by the answering institutions.

For that reason, the estimated number of learners self-studying the Japanese language at institutions that are mainly involved in activities concerning intercultural exchange, not the implementation of language education, or through television, radio, books, the Internet, etc., are not included in the results.

Table 1-1-1 Number of countries and regions implementing Japanese-language education

| | 2018 | 2015 |
|---------|---------------|---------------|
| Country | 134 countries | 130 countries |
| Region | 8 regions | 7 regions |

Table 1-1-2 Number of institutions, number of teachers, and number of learners

| | 2018 | 2015 |
|-----------------------------|-----------|-----------|
| Institutions (Institutions) | 18,661 | 16,179 |
| Teachers (People) | 77,323 | 64,108 |
| Learners (People) | 3,851,774 | 3,655,024 |

The implementation of Japanese-language education was confirmed in 5 new countries, and resumption was confirmed in 4 countries and regions
Confirmation of implementation was no longer possible in 4 countries. This means a net increase of 5 countries and regions

In the present survey, the implementation of Japanese-language education was confirmed in 5 new countries. This includes cases of private sector institutions and organizations inaugurating Japanese-language classes and also cases of new Japanese-language courses being established in universities. Furthermore, it was confirmed that Japanese-language education had been resumed in the 4 countries and regions where Japanese-language education had been implemented in the past

but implementation had not been confirmed in the period leading up to the previous survey.

On the other hand, implementation of Japanese-language education could not be confirmed in 4 countries that were implementing it in the previous survey. The main reason for this is the management difficulties caused by the shortage of teachers and the unstable public security and economic situation, etc. In the world overall, the result is an increase of 5 countries and regions.

Table 1-1-3 The countries for which the implementation of Japanese-language education was newly confirmed and the countries that resumed Japanese-language education in the fiscal2018 survey

| | Country and region | Number of institutions |
|-------------------|--------------------|------------------------|
| Newly implemented | East Timor | 6 |
| | Belize | 2 |
| | Montenegro | 1 |
| | Zimbabwe | 1 |
| | Mozambique | 1 |
| Resumed | Haiti | 1 |
| | Puerto Rico | 1 |
| | Iraq | 2 |
| | Uganda | 2 |

Table 1-1-4 Countries and region for which the implementation of Japanese-language education could not be confirmed in 2015

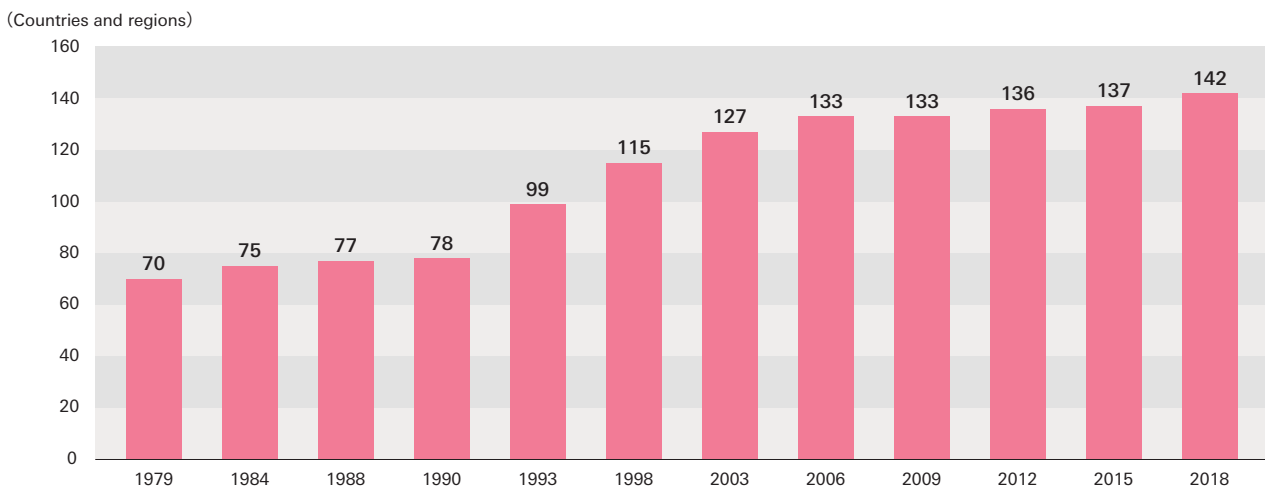
| Country and region | Number of institutions |
|--------------------|------------------------|
| Fiji | 2 |
| Monaco | 1 |
| Afghanistan | 1 |
| Syria | 2 |

Over the past 39 years, the number of implementing countries and regions has increased 2.0 times, the number of institutions has increased 16.3 times, the number of teachers has increased 18.9 times, and the number of learners has increased 30.3 times

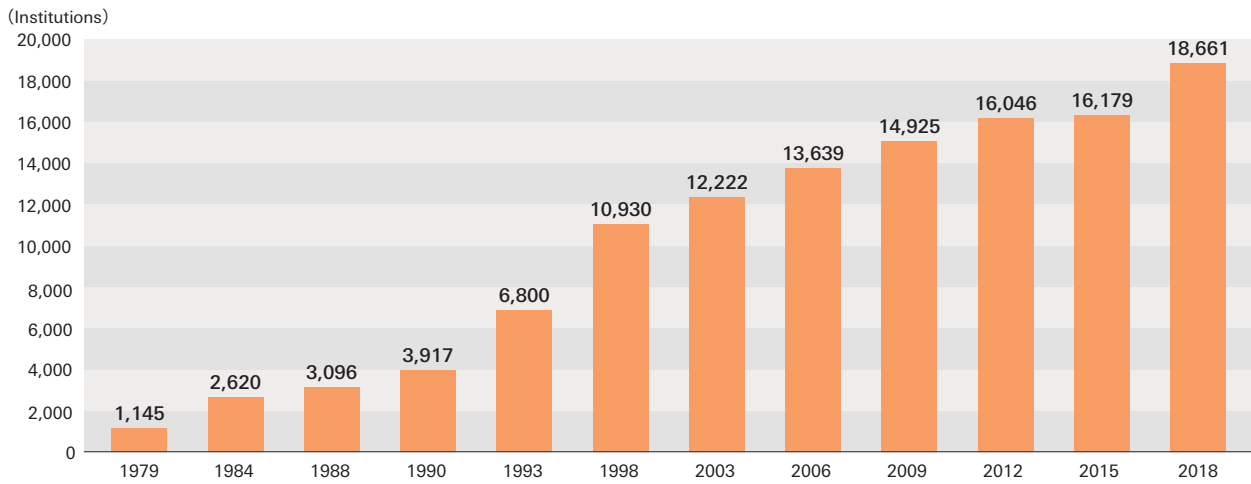
Looking at the results of the past 12 surveys, from the fiscal1979 survey to the fiscal2018 survey, the number of countries and regions implementing Japanese-language education has increased from 70 to 142 (2.0 times), the number of institutions has increased from 1,145 institutions

to 18,661 institutions (16.3 times), the number of teachers has increased from 4,097 people to 77,323 people (18.9 times), and the number of learners has increased from 127,167 people to 3,851,774 people (30.3 times).

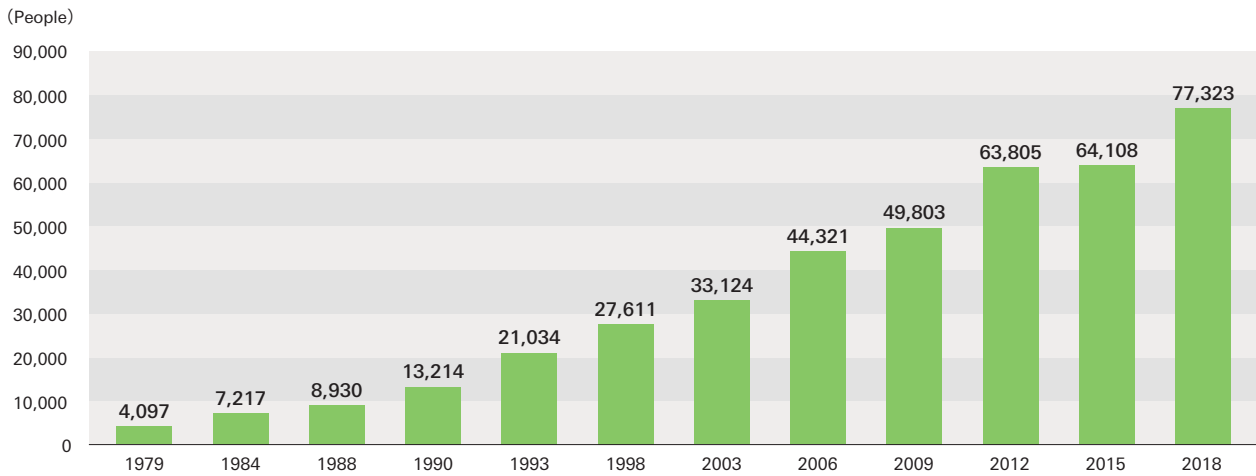
Graph 1-1-1 The number of countries and regions implementing Japanese-language education



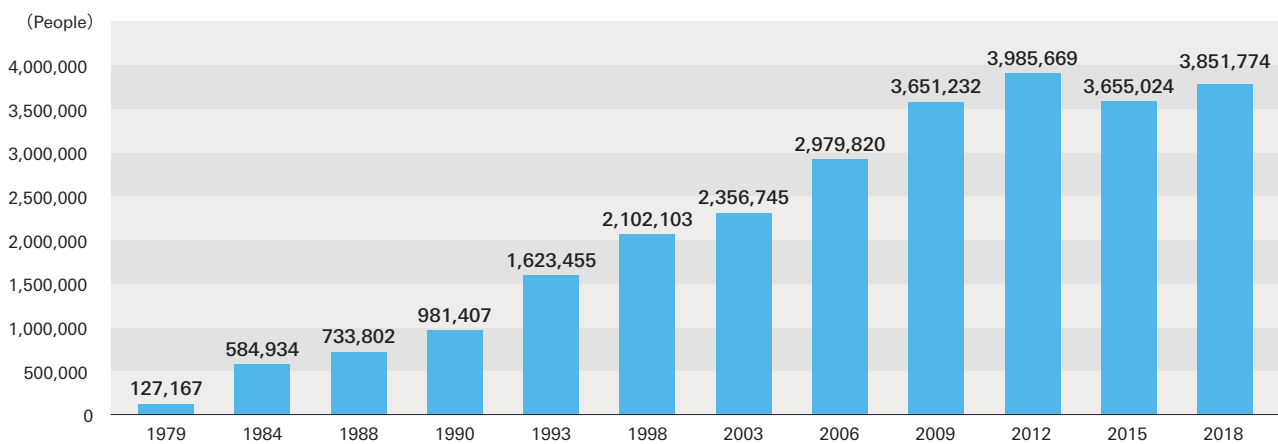
Graph I-I-2 Number of Institutions



Graph I-I-3 Number of Teachers



Graph I-I-4 Number of Learners



2. Situation by region

East Asia and Southeast Asia continue to account for high percentages of the institutions, teachers, and learners

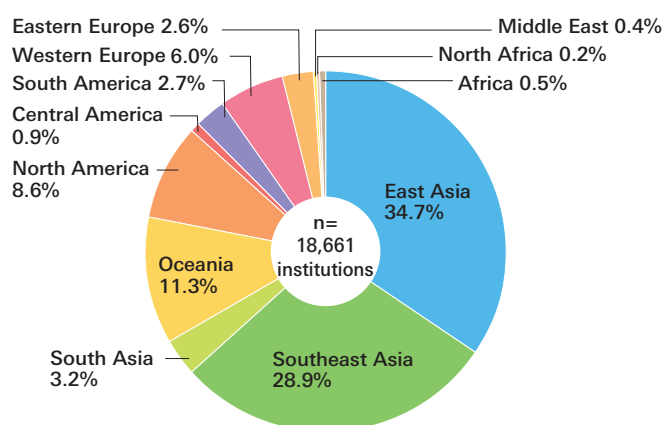
Comparing the number of institutions, number of teachers, and number of learners by region, East Asia accounts for a high percentage for all three, followed by Southeast Asia. These 2 regions account for 63.6% of the institutions, 77.0% of the teachers, and 76.8% of the learners worldwide, and a characteristic is that the percentage accounted for by Southeast Asia is bigger compared to the previous survey for each of the items.

The number of institutions has declined slightly in North America, Western Europe, and the Middle East, but has increased in all other regions since the previous survey, and in particular in Southeast Asia there has been a large increase of 37.7% compared to the previous survey. The number of teachers has increased since the previous survey in all of the regions except the Middle East, and has recorded large increases in Southeast Asia (up 82.0% compared to the previous survey), South Asia (up 42.5% compared to the previous survey) and, although the scale is small, Africa (up 71.4% compared to the previous survey), etc. For the number of learners, a slight decrease was seen in East Asia and North America, but in the other regions it has increased across the board.

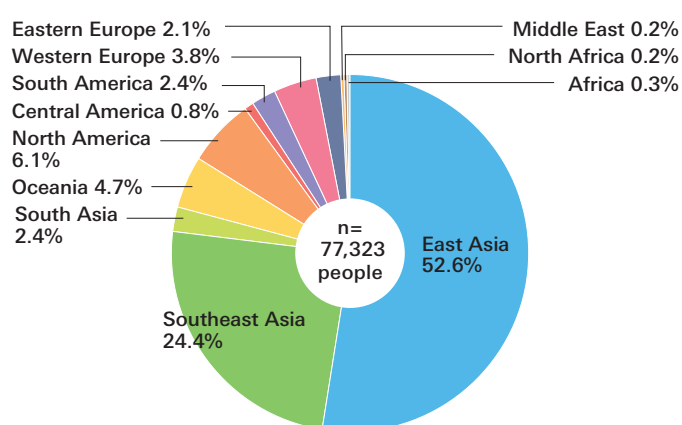
There are differences in individual countries inside the regions, but if we look at the overall picture in this way, the Southeast Asia region is one of the regions with the most striking growth in its results figures in the present survey. Furthermore, regarding East Asia, which has the largest number of institutions, teachers, and learners in the entire world, it was confirmed that compared to the previous survey, in which all of the items decreased, the number of institutions and the number of teachers have increased and the rate of decrease in the number of learners has become much lower. In addition, in South Asia and Oceania there has been a large increase in all of the items, and the results of Australia and India, the major countries in the region, have had a great influence on these results.

Furthermore, Oceania has the greatest number of learners per 100,000 population, with 1,208 people, a result even higher than the result in the previous survey. Also, Southeast Asia (204.2 people) and East Asia (122.4 people) are ranked at the top just as in the previous survey, while on the other hand South Asia (3.6 people), the Middle East (2.1 people), North Africa (1.3 people), and Africa (2.5 people) are ranked lower than the other regions.

Graph 1-2-1 Percentage of Institutions by region



Graph 1-2-2 Percentage of Teachers by region



Graph I-2-3 Percentage of Learners by region

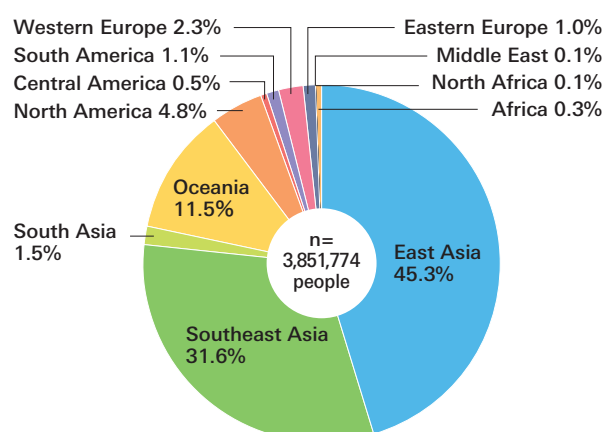


Table I-2-1 Percentage of institutions, teachers, and learners by region

| Region | Region | | | | Teachers | | | | Learners | | | | |
|-----------------|------------------------|------------------------|-----------------------------------|-------|------------------|------------------|-----------------------------------|-------|------------------|------------------|-----------------------------------|-------|---|
| | 2015 (Institutions) | 2018 (Institutions) | Increase/ decrease rate (%) | (%) | 2015 (people) | 2018 (people) | Increase/ decrease rate (%) | (%) | 2015 (people) | 2018 (people) | Increase/ decrease rate (%) | (%) | Learners per 100,000 population (People) |
| East Asia | 5,981 | 6,483 | 8.4 | 34.7 | 37,868 | 40,672 | 7.4 | 52.6 | 1,763,420 | 1,744,110 | ▲ 1.1 | 45.3 | 122.4 |
| Southeast Asia | 3,913 | 5,388 | 37.7 | 28.9 | 10,357 | 18,845 | 82.0 | 24.4 | 1,094,437 | 1,215,835 | 11.1 | 31.6 | 204.2 |
| South Asia | 408 | 604 | 48.0 | 3.2 | 1,277 | 1,820 | 42.5 | 2.4 | 40,795 | 57,356 | 40.6 | 1.5 | 3.6 |
| Oceania | 1,965 | 2,108 | 7.3 | 11.3 | 3,277 | 3,663 | 11.8 | 4.7 | 392,348 | 443,215 | 13.0 | 11.5 | 1,208.0 |
| North America | 1,640 | 1,607 | ▲ 2.0 | 8.6 | 4,621 | 4,683 | 1.3 | 6.1 | 190,599 | 186,394 | ▲ 2.2 | 4.8 | 54.2 |
| Central America | 102 | 168 | 64.7 | 0.9 | 424 | 642 | 51.4 | 0.8 | 11,637 | 17,367 | 49.2 | 0.5 | 9.3 |
| South America | 481 | 501 | 4.2 | 2.7 | 1,719 | 1,838 | 6.9 | 2.4 | 38,152 | 42,226 | 10.7 | 1.1 | 11.2 |
| Western Europe | 1,127 | 1,123 | ▲ 0.4 | 6.0 | 2,786 | 2,969 | 6.6 | 3.8 | 83,559 | 90,114 | 7.8 | 2.3 | 21.9 |
| Eastern Europe | 398 | 477 | 19.8 | 2.6 | 1,346 | 1,652 | 22.7 | 2.1 | 27,154 | 36,836 | 35.7 | 1.0 | 9.4 |
| Middle East | 75 | 71 | ▲ 5.3 | 0.4 | 187 | 176 | ▲ 5.9 | 0.2 | 4,054 | 4,948 | 22.1 | 0.1 | 2.1 |
| North Africa | 21 | 36 | 71.4 | 0.2 | 120 | 147 | 22.5 | 0.2 | 1,777 | 2,569 | 44.6 | 0.1 | 1.3 |
| Africa | 68 | 95 | 39.7 | 0.5 | 126 | 216 | 71.4 | 0.3 | 7,092 | 10,804 | 52.3 | 0.3 | 2.5 |
| Entire world | 16,179 | 18,661 | 15.3 | 100.0 | 64,108 | 77,323 | 20.6 | 100.0 | 3,655,024 | 3,851,774 | 5.4 | 100.0 | 61.6 |

* The populations are from the United Nations "Population and Vital Statistics Report 2019"
(For Taiwan only, the figures for December 2018 from the website of the Department of Statistics in
the Ministry of the Interior are cited.)

16.1% of the institutions involved in Japanese-language education worldwide are in the Republic of Korea, 15.4% are in Indonesia, and 13.0% are in China

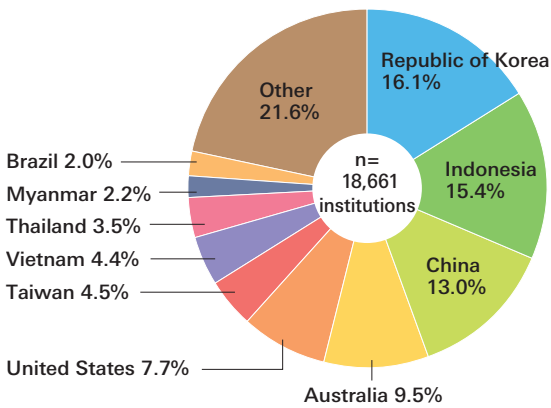
The top three countries for the number of institutions are the Republic of Korea (2,998 institutions), Indonesia (2,879 institutions), and China (2,435 institutions), and these three countries account for just over 40% of the total. Next is Australia with 1,764 institutions and the United States with 1,446 institutions, meaning that the top five countries account for more than 1,000 institutions. Looking at the increases and decreases in the top ten countries and regions for the number of institutions, the number of institutions has increased except for in the United States and Taiwan where it has declined slightly compared to the previous survey.

Furthermore, regarding the top-ranked countries for number of teachers, the results are that China (20,220 people) and the Republic of Korea (15,345 people) are ranked first and second as in the previous survey, but Vietnam (7,030 people), which has seen a rapid increase in the number of teachers over the last three years, has risen to third. Note that the number of teachers has increased in

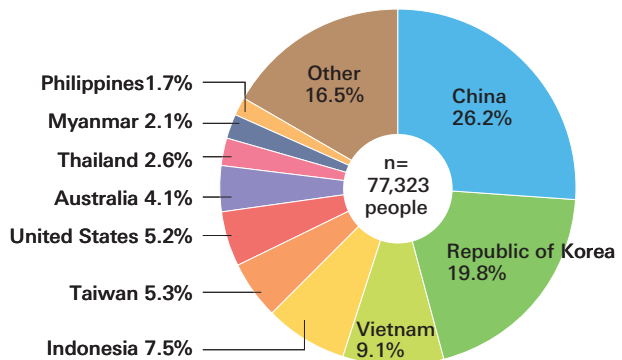
all of the top ten countries, and the increase is particularly marked in ninth-ranked Myanmar (1,593 people, up 204.0% compared to the previous survey) and tenth-ranked Philippines (1,289 people, up 78.8% compared to the previous survey).

Regarding learners, there is no change in the rankings among the top four countries: China with 1,004,625 people; followed by Indonesia, with 709,479 people; the Republic of Korea, with 531,511 people; and Australia, with 405,175 people. Next at fifth is Thailand (184,962 people), which increased 6.4% compared to the previous survey; and Vietnam (174,521 people), which has had a large increase of approximately 110,000 people since the previous survey, is positioned at sixth. Taiwan (170,159 people), where learners have decreased by more than 20%, and the United States (166,905 people), where learners have decreased slightly, have fallen down the rankings since the previous survey to seventh and eighth, respectively.

Graph I-2-4 Percentage of Institutions in each country and region



Graph I-2-5 Percentage of Teachers in each country and region



Graph I-2-6 Percentage of Learners in each country and region

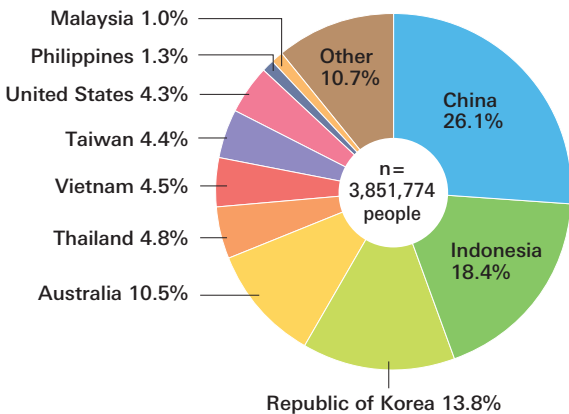


Table I-2-2 Number of learners/number of institutions/number of teachers in each country and region (Ranked by the number of learners in 2018)

| Rank | 2015 Rank | Country and region | Learners (People) | | | Institutions (Institutions) | | | Teachers (People) | | |
|------|-----------|--------------------|-------------------|---------|----------------------------|-----------------------------|-------|----------------------------|-------------------|--------|----------------------------|
| | | | 2018 | 2015 | Increase/decrease rate (%) | 2018 | 2015 | Increase/decrease rate (%) | 2018 | 2015 | Increase/decrease rate (%) |
| 1 | 1 | China | 1,004,625 | 953,283 | 5.4 | 2,435 | 2,115 | 15.1 | 20,220 | 18,312 | 10.4 |
| 2 | 2 | Indonesia | 709,479 | 745,125 | ▲4.8 | 2,879 | 2,496 | 15.3 | 5,793 | 4,540 | 27.6 |
| 3 | 3 | Republic of Korea | 531,511 | 556,237 | ▲4.4 | 2,998 | 2,862 | 4.8 | 15,345 | 14,855 | 3.3 |
| 4 | 4 | Australia | 405,175 | 357,348 | 13.4 | 1,764 | 1,643 | 7.4 | 3,135 | 2,800 | 12.0 |
| 5 | 6 | Thailand | 184,962 | 173,817 | 6.4 | 659 | 606 | 8.7 | 2,047 | 1,911 | 7.1 |
| 6 | 8 | Vietnam | 174,521 | 64,863 | 169.1 | 818 | 219 | 273.5 | 7,030 | 1,795 | 291.6 |
| 7 | 5 | Taiwan | 170,159 | 220,045 | ▲22.7 | 846 | 851 | ▲0.6 | 4,106 | 3,877 | 5.9 |
| 8 | 7 | United States | 166,905 | 170,998 | ▲2.4 | 1,446 | 1,462 | ▲1.1 | 4,021 | 3,894 | 3.3 |
| 9 | 9 | Philippines | 51,530 | 50,038 | 3.0 | 315 | 209 | 50.7 | 1,289 | 721 | 78.8 |
| 10 | 10 | Malaysia | 39,247 | 33,224 | 18.1 | 212 | 176 | 20.5 | 485 | 430 | 12.8 |
| 11 | 12 | India | 38,100 | 24,011 | 58.7 | 304 | 184 | 65.2 | 1,006 | 655 | 53.6 |
| 12 | 19 | Myanmar | 35,600 | 11,301 | 215.0 | 411 | 132 | 211.4 | 1,593 | 524 | 204.0 |
| 13 | 11 | New Zealand | 32,764 | 29,925 | 9.5 | 275 | 257 | 7.0 | 421 | 378 | 11.4 |
| 14 | 13 | Brazil | 26,157 | 22,993 | 13.8 | 380 | 352 | 8.0 | 1,182 | 1,140 | 3.7 |
| 15 | 14 | Hong Kong | 24,558 | 22,613 | 8.6 | 70 | 70 | 0.0 | 575 | 523 | 9.9 |
| 16 | 15 | France | 24,150 | 20,875 | 15.7 | 229 | 222 | 3.2 | 763 | 723 | 5.5 |
| 17 | 16 | United Kingdom | 20,040 | 20,093 | ▲0.3 | 288 | 364 | ▲20.9 | 646 | 704 | ▲8.2 |
| 18 | 17 | Canada | 19,489 | 19,601 | ▲0.6 | 161 | 178 | ▲9.6 | 662 | 727 | ▲8.9 |
| 19 | 18 | Germany | 15,465 | 13,256 | 16.7 | 157 | 181 | ▲13.3 | 473 | 457 | 3.5 |
| 20 | 23 | Mexico | 13,673 | 9,240 | 48.0 | 120 | 68 | 76.5 | 483 | 322 | 50.0 |
| 21 | 20 | Singapore | 12,300 | 10,798 | 13.9 | 19 | 30 | ▲36.7 | 221 | 227 | ▲2.6 |
| 22 | 24 | Russia | 11,764 | 8,650 | 36.0 | 169 | 126 | 34.1 | 633 | 480 | 31.9 |
| 23 | 22 | Mongolia | 11,755 | 9,914 | 18.6 | 128 | 76 | 68.4 | 363 | 253 | 43.5 |
| 24 | 26 | Spain | 8,495 | 5,122 | 65.9 | 141 | 80 | 76.3 | 325 | 192 | 69.3 |
| 25 | 21 | Sri Lanka | 8,454 | 10,120 | ▲16.5 | 77 | 76 | 1.3 | 125 | 132 | ▲5.3 |
| 26 | 25 | Italy | 7,831 | 7,031 | 11.4 | 62 | 51 | 21.6 | 235 | 193 | 21.8 |
| 27 | 30 | Cambodia | 5,419 | 4,009 | 35.2 | 51 | 29 | 75.9 | 307 | 157 | 95.5 |
| 28 | 28 | Nepal | 5,326 | 4,262 | 25.0 | 126 | 106 | 18.9 | 443 | 376 | 17.8 |
| 29 | 33 | Argentina | 5,054 | 3,571 | 41.5 | 46 | 42 | 9.5 | 206 | 192 | 7.3 |
| 30 | 38 | Bangladesh | 4,801 | 2,158 | 122.5 | 85 | 37 | 129.7 | 220 | 94 | 134.0 |
| 31 | 27 | Poland | 4,483 | 4,416 | 1.5 | 48 | 57 | ▲15.8 | 200 | 222 | ▲9.9 |
| 32 | 29 | Peru | 3,792 | 4,074 | ▲6.9 | 10 | 19 | ▲47.4 | 72 | 92 | ▲21.7 |
| 33 | 35 | Côte d'Ivoire | 3,392 | 2,662 | 27.4 | 11 | 7 | 57.1 | 16 | 15 | 6.7 |
| 34 | 120 | Turkmenistan | 3,259 | 49 | 6551.0 | 9 | 1 | 800.0 | 35 | 5 | 600.0 |
| 35 | 31 | Paraguay | 3,010 | 3,725 | ▲19.2 | 12 | 16 | ▲25.0 | 146 | 91 | 60.4 |
| 36 | 32 | Switzerland | 3,008 | 3,709 | ▲18.9 | 72 | 43 | 67.4 | 194 | 151 | 28.5 |
| 37 | 34 | Ireland | 2,803 | 3,070 | ▲8.7 | 44 | 40 | 10.0 | 67 | 68 | ▲1.5 |
| 38 | 54 | Kenya | 2,573 | 1,107 | 132.4 | 43 | 31 | 38.7 | 111 | 48 | 131.3 |
| 39 | 44 | Madagascar | 2,532 | 1,537 | 64.7 | 20 | 15 | 33.3 | 47 | 28 | 67.9 |
| 40 | 37 | Turkey | 2,500 | 2,194 | 13.9 | 34 | 42 | ▲19.0 | 85 | 87 | ▲2.3 |
| 41 | 46 | Uzbekistan | 2,288 | 1,505 | 52.0 | 15 | 14 | 7.1 | 85 | 61 | 39.3 |
| 42 | 45 | Ukraine | 2,174 | 1,523 | 42.7 | 20 | 18 | 11.1 | 97 | 97 | 0.0 |
| 43 | 40 | New Caledonia | 2,159 | 2,026 | 6.6 | 25 | 27 | ▲7.4 | 47 | 40 | 17.5 |
| 44 | 56 | Laos | 1,955 | 1,046 | 86.9 | 16 | 14 | 14.3 | 58 | 49 | 18.4 |
| 45 | 41 | Hungary | 1,906 | 1,992 | ▲4.3 | 39 | 32 | 21.9 | 95 | 93 | 2.2 |
| 46 | 36 | Sweden | 1,769 | 2,457 | ▲28.0 | 29 | 43 | ▲32.6 | 57 | 86 | ▲33.7 |
| 47 | 47 | Columbia | 1,645 | 1,502 | 9.5 | 18 | 19 | ▲5.3 | 91 | 73 | 24.7 |
| 48 | 57 | Kyrgyz | 1,606 | 924 | 73.8 | 19 | 23 | ▲17.4 | 47 | 48 | ▲2.1 |
| 49 | 58 | Egypt | 1,602 | 832 | 92.5 | 21 | 12 | 75.0 | 120 | 100 | 20.0 |
| 50 | 43 | Guam | 1,505 | 1,547 | ▲2.7 | 14 | 11 | 27.3 | 21 | 22 | ▲4.5 |
| 51 | 49 | Macao | 1,502 | 1,328 | 13.1 | 6 | 7 | ▲14.3 | 63 | 48 | 31.3 |
| 52 | 47 | Netherlands | 1,496 | 1,502 | ▲0.4 | 16 | 15 | 6.7 | 40 | 41 | ▲2.4 |
| 53 | 39 | Romania | 1,389 | 2,052 | ▲32.3 | 14 | 18 | ▲22.2 | 87 | 41 | 112.2 |
| 54 | 51 | Bulgaria | 1,347 | 1,245 | 8.2 | 8 | 7 | 14.3 | 40 | 33 | 21.2 |
| 55 | 53 | Czech Republic | 1,246 | 1,175 | 6.0 | 21 | 17 | 23.5 | 73 | 53 | 37.7 |
| 56 | 55 | Chile | 1,205 | 1,078 | 11.8 | 10 | 8 | 25.0 | 43 | 47 | ▲8.5 |
| 57 | 52 | Belgium | 960 | 1,191 | ▲19.4 | 5 | 12 | ▲58.3 | 20 | 37 | ▲45.9 |
| 58 | 59 | Ghana | 939 | 755 | 24.4 | 7 | 3 | 133.3 | 16 | 3 | 433.3 |
| 59 | 64 | Costa Rica | 892 | 522 | 70.9 | 12 | 8 | 50.0 | 39 | 26 | 50.0 |
| 60 | 50 | Austria | 800 | 1,322 | ▲39.5 | 14 | 12 | 16.7 | 28 | 30 | ▲6.7 |

| Rank | 2015 Rank | Country and region | Learners (People) | | | Institutions (Institutions) | | | Teachers (People) | | |
|------|-----------|--------------------------|-------------------|-------|----------------------------|-----------------------------|------|----------------------------|-------------------|------|----------------------------|
| | | | 2018 | 2015 | Increase/decrease rate (%) | 2018 | 2015 | Increase/decrease rate (%) | 2018 | 2015 | Increase/decrease rate (%) |
| 61 | 63 | Serbia | 797 | 533 | 49.5 | 23 | 11 | 109.1 | 35 | 31 | 12.9 |
| 62 | 72 | Denmark | 751 | 354 | 112.1 | 15 | 4 | 275.0 | 23 | 13 | 76.9 |
| 63 | 96 | Latvia | 697 | 156 | 346.8 | 2 | 3 | ▲33.3 | 4 | 8 | ▲50.0 |
| 64 | 62 | Portugal | 682 | 573 | 19.0 | 14 | 10 | 40.0 | 28 | 15 | 86.7 |
| 65 | - | East Timor | 651 | - | - | 6 | - | - | 17 | - | - |
| 66 | 65 | Norway | 640 | 505 | 26.7 | 9 | 10 | ▲10.0 | 17 | 16 | 6.3 |
| 67 | 68 | Greece | 608 | 479 | 26.9 | 11 | 11 | 0.0 | 29 | 19 | 52.6 |
| 68 | 111 | Pakistan | 587 | 84 | 598.8 | 8 | 3 | 166.7 | 16 | 13 | 23.1 |
| 69 | 86 | Cuba | 574 | 243 | 136.2 | 4 | 3 | 33.3 | 10 | 12 | ▲16.7 |
| 70 | 67 | Bolivia | 557 | 489 | 13.9 | 6 | 6 | 0.0 | 40 | 36 | 11.1 |
| 71 | 60 | Morocco | 547 | 665 | ▲17.7 | 7 | 6 | 16.7 | 15 | 13 | 15.4 |
| 72 | 73 | Northern Mariana Islands | 540 | 345 | 56.5 | 4 | 3 | 33.3 | 4 | 3 | 33.3 |
| 73 | 61 | Honduras | 492 | 617 | ▲20.3 | 6 | 5 | 20.0 | 21 | 17 | 23.5 |
| 74 | 69 | Israel | 491 | 458 | 7.2 | 9 | 10 | ▲10.0 | 16 | 22 | ▲27.3 |
| 75 | - | Iraq | 485 | - | - | 2 | - | - | 4 | - | - |
| 76 | 78 | Kazakhstan | 451 | 297 | 51.9 | 10 | 5 | 100.0 | 35 | 30 | 16.7 |
| 77 | 70 | Venezuela | 443 | 399 | 11.0 | 11 | 12 | ▲8.3 | 35 | 35 | 0.0 |
| 78 | 84 | El Salvador | 424 | 269 | 57.6 | 4 | 4 | 0.0 | 24 | 17 | 41.2 |
| 79 | 76 | Belarus | 415 | 305 | 36.1 | 9 | 8 | 12.5 | 27 | 16 | 68.8 |
| 80 | 71 | United Arab Emirates | 406 | 395 | 2.8 | 9 | 5 | 80.0 | 29 | 16 | 81.3 |
| 81 | 75 | Estonia | 390 | 317 | 23.0 | 14 | 11 | 27.3 | 25 | 17 | 47.1 |
| 82 | 88 | Georgia | 385 | 237 | 62.4 | 6 | 5 | 20.0 | 18 | 12 | 50.0 |
| 83 | 101 | Cameroon | 380 | 140 | 171.4 | 2 | 3 | ▲33.3 | 5 | 6 | ▲16.7 |
| 84 | 77 | Lithuania | 373 | 301 | 23.9 | 11 | 6 | 83.3 | 17 | 10 | 70.0 |
| 85 | 83 | Guatemala | 333 | 271 | 22.9 | 6 | 4 | 50.0 | 10 | 8 | 25.0 |
| 86 | 80 | Slovenia | 312 | 275 | 13.5 | 6 | 1 | 500.0 | 19 | 8 | 137.5 |
| 87 | 42 | Finland | 284 | 1,601 | ▲82.3 | 6 | 20 | ▲70.0 | 11 | 29 | ▲62.1 |
| 88 | 80 | Slovakia | 259 | 275 | ▲5.8 | 8 | 9 | ▲11.1 | 16 | 22 | ▲27.3 |
| 89 | 100 | Qatar | 256 | 146 | 75.3 | 5 | 4 | 25.0 | 12 | 14 | ▲14.3 |
| 90 | 87 | Azerbaijan | 255 | 239 | 6.7 | 5 | 4 | 25.0 | 12 | 9 | 33.3 |
| 91 | 85 | Uruguay | 251 | 244 | 2.9 | 4 | 3 | 33.3 | 12 | 7 | 71.4 |
| 92 | 95 | Jordan | 250 | 166 | 50.6 | 2 | 3 | ▲33.3 | 3 | 9 | ▲66.7 |
| 93 | 79 | Micronesia | 243 | 281 | ▲13.5 | 5 | 5 | 0.0 | 6 | 6 | 0.0 |
| 94 | 74 | Marshall | 242 | 324 | ▲25.3 | 4 | 4 | 0.0 | 4 | 4 | 0.0 |
| 95 | 119 | Dominican Republic | 227 | 50 | 354.0 | 4 | 1 | 300.0 | 26 | 6 | 333.3 |
| 96 | 105 | Benin | 225 | 122 | 84.4 | 1 | 1 | 0.0 | 2 | 1 | 100.0 |
| 97 | 98 | Tonga | 219 | 153 | 43.1 | 8 | 6 | 33.3 | 13 | 12 | 8.3 |
| 98 | 102 | Luxembourg | 218 | 135 | 61.5 | 6 | 3 | 100.0 | 6 | 3 | 100.0 |
| 99 | 89 | Armenia | 217 | 235 | ▲7.7 | 6 | 9 | ▲33.3 | 21 | 23 | ▲8.7 |
| 99 | 104 | Jamaica | 217 | 127 | 70.9 | 3 | 3 | 0.0 | 5 | 6 | ▲16.7 |
| 101 | 90 | Iran | 215 | 227 | ▲5.3 | 2 | 2 | 0.0 | 15 | 13 | 15.4 |
| 102 | 133 | Albania | 200 | 15 | 1233.3 | 1 | 1 | 0.0 | 1 | 2 | ▲50.0 |
| 103 | 93 | Croatia | 199 | 175 | 13.7 | 7 | 5 | 40.0 | 19 | 11 | 72.7 |
| 104 | 65 | Ethiopia | 190 | 505 | ▲62.4 | 2 | 2 | 0.0 | 5 | 6 | ▲16.7 |
| 105 | 113 | Tajikistan | 186 | 77 | 141.6 | 2 | 3 | ▲33.3 | 4 | 9 | ▲55.6 |
| 106 | 106 | Tunisia | 185 | 113 | 63.7 | 4 | 1 | 300.0 | 6 | 3 | 100.0 |
| 107 | 91 | Brunei | 171 | 216 | ▲20.8 | 2 | 2 | 0.0 | 5 | 3 | 66.7 |
| 108 | 112 | Trinidad and Tobago | 170 | 82 | 107.3 | 1 | 1 | 0.0 | 3 | 2 | 50.0 |
| 109 | 130 | Zambia | 155 | 20 | 675.0 | 1 | 1 | 0.0 | 2 | 4 | ▲50.0 |
| 110 | 117 | French Polynesia | 134 | 58 | 131.0 | 3 | 1 | 200.0 | 2 | 1 | 100.0 |
| 111 | 108 | Panama | 132 | 107 | 23.4 | 3 | 3 | 0.0 | 6 | 4 | 50.0 |
| 112 | 99 | Sudan | 130 | 150 | ▲13.3 | 1 | 1 | 0.0 | 1 | 1 | 0.0 |
| 113 | 97 | Senegal | 128 | 155 | ▲17.4 | 1 | 2 | ▲50.0 | 1 | 2 | ▲50.0 |
| 114 | 107 | Nicaragua | 120 | 109 | 10.1 | 1 | 2 | ▲50.0 | 7 | 4 | 75.0 |
| 115 | 115 | Moldova | 115 | 75 | 53.3 | 1 | 1 | 0.0 | 3 | 2 | 50.0 |
| 116 | 113 | Ecuador | 112 | 77 | 45.5 | 4 | 4 | 0.0 | 11 | 6 | 83.3 |
| 117 | 109 | Bahrain | 110 | 95 | 15.8 | 2 | 2 | 0.0 | 2 | 2 | 0.0 |
| 118 | 134 | Tanzania | 108 | 14 | 671.4 | 1 | 1 | 0.0 | 1 | 1 | 0.0 |
| 119 | 132 | Algeria | 105 | 17 | 517.6 | 3 | 1 | 200.0 | 5 | 3 | 66.7 |
| 120 | 82 | Iceland | 99 | 273 | ▲63.7 | 4 | 4 | 0.0 | 5 | 7 | ▲28.6 |

| Rank | 2015 Rank | Country and region | Learners (People) | | | Institutions (Institutions) | | | Teachers (People) | | |
|--------------|-----------|----------------------------------|-------------------|-----------|-----------------------------------|-----------------------------|--------|-----------------------------------|-------------------|--------|-----------------------------------|
| | | | 2018 | 2015 | Increase/ decrease rate (%) | 2018 | 2015 | Increase/ decrease rate (%) | 2018 | 2015 | Increase/ decrease rate (%) |
| 121 | - | Mozambique | 82 | - | - | 1 | - | - | 1 | - | - |
| 122 | 125 | Papua New Guinea | 79 | 30 | 163.3 | 2 | 1 | 100.0 | 3 | 1 | 200.0 |
| 123 | 92 | Palau | 77 | 214 | ▲64.0 | 2 | 3 | ▲33.3 | 2 | 3 | ▲33.3 |
| 124 | 130 | Oman | 75 | 20 | 275.0 | 2 | 1 | 100.0 | 2 | 1 | 100.0 |
| 125 | 110 | Bosnia and Herzegovina | 65 | 88 | ▲26.1 | 1 | 2 | ▲50.0 | 1 | 2 | ▲50.0 |
| 125 | 118 | Kuwait | 65 | 55 | 18.2 | 1 | 1 | 0.0 | 2 | 3 | ▲33.3 |
| 127 | 128 | Saudi Arabia | 60 | 27 | 122.2 | 1 | 1 | 0.0 | 4 | 4 | 0.0 |
| 128 | - | Puerto Rico | 50 | - | - | 1 | - | - | 1 | - | - |
| 129 | 129 | North Macedonia | 49 | 23 | 113.0 | 2 | 1 | 100.0 | 2 | 1 | 100.0 |
| 130 | 125 | Bhutan | 48 | 30 | 60.0 | 2 | 1 | 100.0 | 8 | 4 | 100.0 |
| 131 | 122 | Kiribati | 45 | 45 | 0.0 | 1 | 1 | 0.0 | 3 | 3 | 0.0 |
| 132 | 103 | Maldives | 40 | 130 | ▲69.2 | 2 | 1 | 100.0 | 2 | 3 | ▲33.3 |
| 133 | - | Haiti | 36 | - | - | 1 | - | - | 4 | - | - |
| 134 | 116 | Lebanon | 35 | 63 | ▲44.4 | 2 | 1 | 100.0 | 2 | 1 | 100.0 |
| 134 | - | Uganda | 35 | - | - | 2 | - | - | 2 | - | - |
| 136 | 123 | Samoa | 33 | 44 | ▲25.0 | 1 | 1 | 0.0 | 2 | 1 | 100.0 |
| 137 | 127 | Democratic Republic of the Congo | 30 | 28 | 7.1 | 1 | 1 | 0.0 | 5 | 9 | ▲44.4 |
| 138 | - | Belize | 27 | - | - | 2 | - | - | 3 | - | - |
| 139 | 121 | South Africa | 20 | 47 | ▲57.4 | 1 | 1 | 0.0 | 1 | 3 | ▲66.7 |
| 140 | 136 | Malta | 15 | 6 | 150.0 | 1 | 1 | 0.0 | 2 | 1 | 100.0 |
| 140 | - | Zimbabwe | 15 | - | - | 1 | - | - | 1 | - | - |
| 142 | - | Montenegro | 9 | - | - | 1 | - | - | 1 | - | - |
| - | 94 | Syria | 0 | 168 | ▲100.0 | 0 | 2 | ▲100.0 | 0 | 13 | ▲100.0 |
| - | 124 | Afghanistan | 0 | 40 | ▲100.0 | 0 | 1 | ▲100.0 | 0 | 2 | ▲100.0 |
| - | 135 | Fiji | 0 | 8 | ▲100.0 | 0 | 2 | ▲100.0 | 0 | 3 | ▲100.0 |
| - | 137 | Monaco | 0 | 5 | ▲100.0 | 0 | 1 | ▲100.0 | 0 | 1 | ▲100.0 |
| Entire world | | | 3,851,774 | 3,655,024 | 5.4 | 18,661 | 16,179 | 15.3 | 77,323 | 64,108 | 20.6 |

The number of countries and regions in which the number of institutions, the number of teachers, and the number of learners increased is much higher than the number of countries and regions in which those items decreased

Looking at the increases and decreases in the number of institutions from the fiscal2015 survey to the fiscal2018 survey, in 83 countries and regions there was an increase of 2,729 institutions, in 28 countries and regions there was no change from the previous survey, and in 35 countries and regions there was a decrease of 247 institutions, resulting in a total increase of 2,482 institutions worldwide. The countries with the biggest increases were Vietnam, Indonesia, China, Myanmar, and the United Kingdom, Germany, Canada, the United States, accounted for most of the decreases.

Next, looking at the increases and decreases in the number of teachers, in 96 countries and regions there was an increase of 13,540 people, in 9 countries and regions there was no change from the previous survey, and in 41 countries and regions there was a decrease of 325 people, resulting in a total increase of 13,215 people worldwide. The countries accounting for the biggest increases were Vietnam, China, Indonesia, Myanmar, and Canada, the

United Kingdom, Sweden accounted for a comparatively large percentage of the decreases.

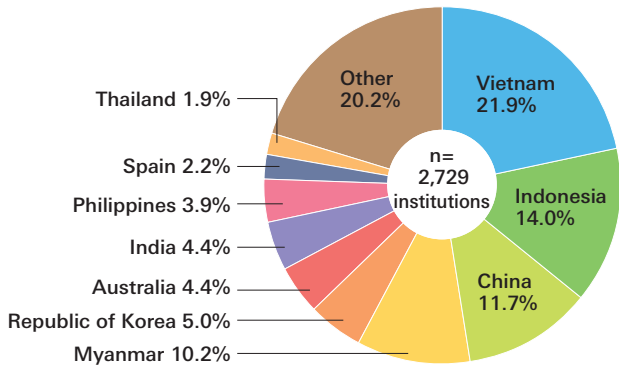
Regarding the increases and decreases in the number of learners, in 104 countries and regions there was an increase of 319,979 people, in 1 country or region there was no change from the previous survey, and in 41 countries and regions there was a decrease of 123,229 people, resulting in a total increase of 196,750 people worldwide. The greatest increase in the number of learners was in Vietnam, China, Australia, Myanmar, India, and the largest decreases were in Taiwan, Indonesia, the Republic of Korea.

Therefore, the result is that the increases were higher than the decreases in all of the items, and in particular the rapid growth in several countries in Southeast Asia including Vietnam and Myanmar, and the increases in countries and regions with large-scale Japanese-language education including China had an influence on the overall results.

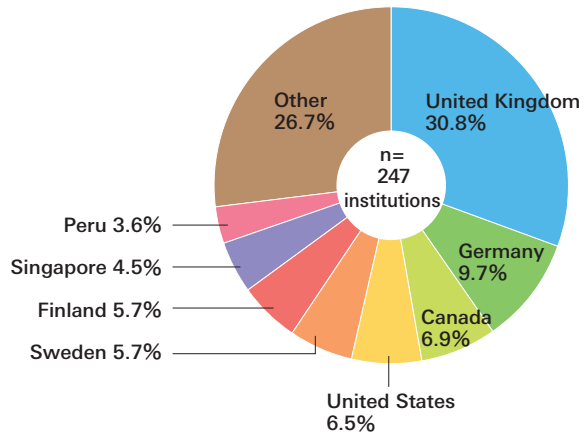
Table 1-2-3 Breakdown of the increases and decreases in the number of institutions, teachers and learners

| | Countries and regions with an increase | Countries and regions unchanged from the previous survey | Countries and regions with a decrease The figure in brackets is the number of countries and regions which decreased to zero | (Number of countries and regions implementing Japanese-language education in the present survey) |
|------------------------|--|--|--|--|
| Number of institutions | 83 | 28 | 35 (4) | 142 |
| Number of teachers | 96 | 9 | 41 (4) | 142 |
| Number of learners | 104 | 1 | 41 (4) | 142 |

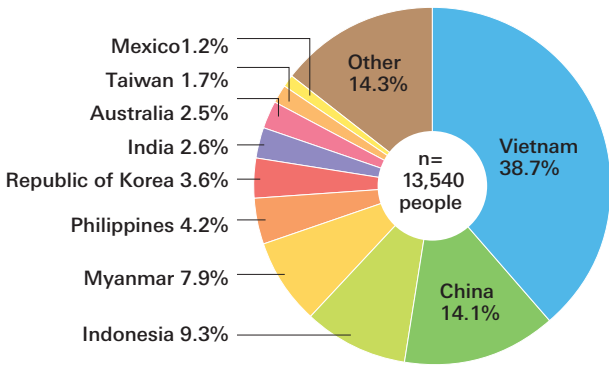
Graph 1-2-7 Percentages of the countries and regions in which the number of institutions increased



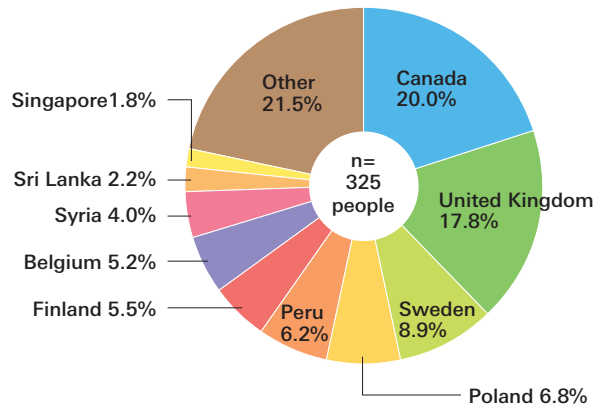
Graph 1-2-8 Percentages of the countries and regions in which the number of institutions decreased



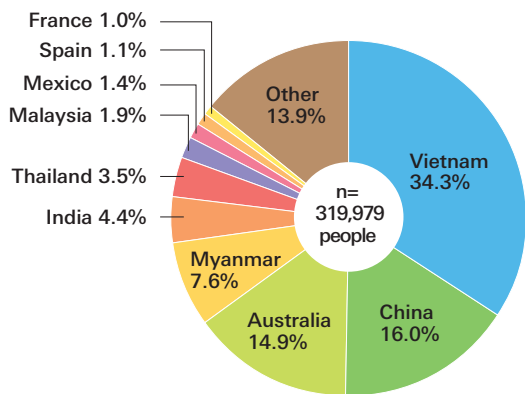
Graph 1-2-9 Percentages of the countries and regions in which the number of teachers increased



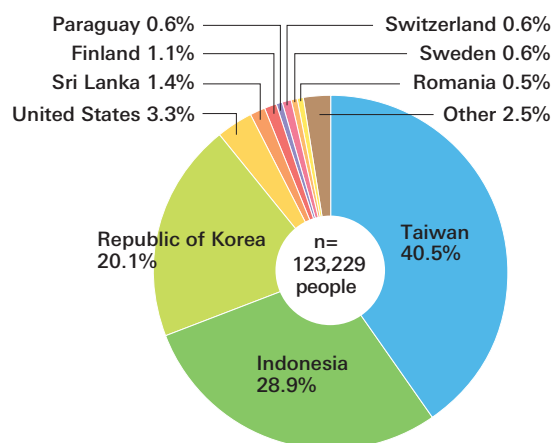
Graph 1-2-10 Percentages of the countries and regions in which the number of teachers decreased



Graph 1-2-11 Percentages of the countries and regions in which the number of learners increased



Graph 1-2-12 Percentages of the countries and regions in which the number of learners decreased



Key points regarding the situation by region

In the East Asia region, the results were that the number of institutions and the number of teachers increased while on the other hand there was a slight decrease in learners. Regarding the decrease in learners, the results in Taiwan and the Republic of Korea, where the population of learners itself has greatly decreased due to falling birth rates, had a big impact, but due to the impact of the increase in China, learners only declined slightly in the region overall.

Next, in the Southeast Asia region where the scale of Japanese-language education is large, there has been a large increase in the number of institutions and the number of teachers, and the number of learners has also increased to more than 100,000 people in the region overall. In Indonesia, which has the second largest number of learners in the world, the number of learners continued to be fewer than in the previous survey, but the number of learners increased in all the other major countries. The increase in the number of learners in Vietnam and Myanmar was particularly marked, and it is thought that the entry of Japanese companies, and expansion of opportunities to visit Japan due to the technical internship system, etc. were the major factors in both countries.

In addition, the expansion of Japanese-language education was seen in the regions of South Asia, Oceania, Latin America, and Eastern Europe. We can conclude that the results of the major countries in each region, India, Australia, New Zealand, Mexico, Brazil, and Russia respectively, directly led to this, and in the other

comparatively small-scale countries as well there were many cases in which the number of institutions and the number of learners increased.

On the other hand, in North America the number of teachers has increased while on the other hand the number of institutions and the number of learners have decreased. The North America region is comprised of the 2 countries of the United States and Canada, but their shared situation surrounding Japanese-language education is the shrinking of the education budget related to foreign-language education, and it is thought that this had a significant effect on the results in the present survey as well. Furthermore, in Western Europe the result was that the number of institutions declined slightly while on the other hand the number of teachers and the number of learners increased. Regarding the trends in the number of institutions since the previous survey, the decreases in the United Kingdom had a strong effect on the results for the region overall.

Looking at regions such as the Middle East and Africa, etc. where the scale of Japanese-language education is comparatively small, there are many cases in which the number of institutions, the number of teachers, and the number of learners all increased. In these regions, there are countries where Japanese-language education was newly started and countries where it was temporarily suspended and then resumed, while on the other hand countries where the scale of Japanese-language education shrank due to the difficulty of securing teachers and the unstable social and economic situation were also seen.

3. Situation by educational stage

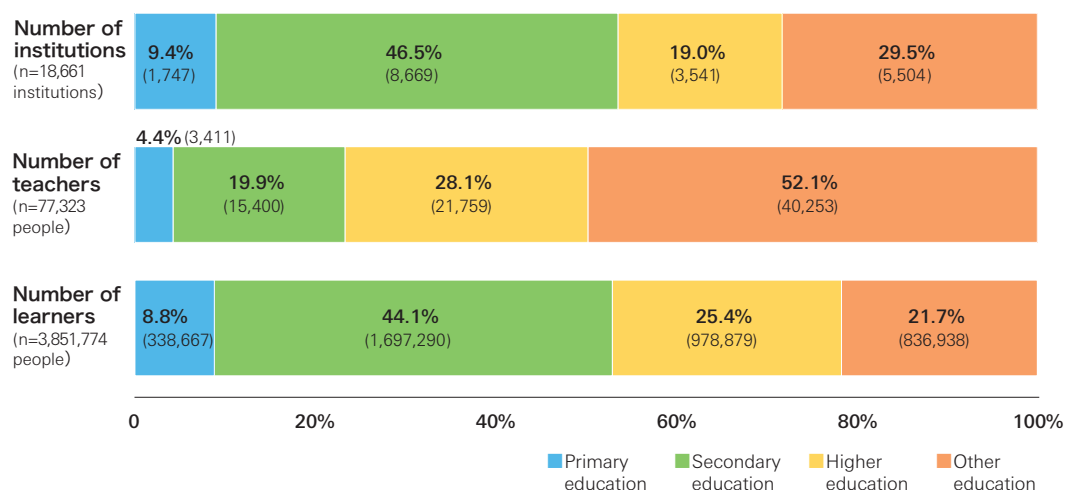
The greatest number of institutions and number of learners are in secondary education; the greatest number of teachers are in the category of non-school education

The number of institutions involved in Japanese-language education by educational stage was primary education, 1,747 institutions; secondary education, 8,669 institutions; higher education, 3,541 institutions; and non-school education, 5,504 institutions, so the secondary educational stage has the greatest number of institutions implementing Japanese-language education. In the present survey, the number of institutions implementing Japanese-language education in secondary education has increased, but the number of non-school education institutions has increased by an even higher percentage. Growth in the Asian region, particularly Vietnam and Myanmar, has had a large effect on this result, but there are many cases of the number of non-school education institutions increasing in other regions as well.

For the number of teachers, the results were primary education, 3,411 people; secondary education, 15,400 people; higher education, 21,759 people; and non-school education, 40,253 people, so unlike in the case of the

number of institutions, the percentage accounted for by teachers teaching the Japanese-language in the category of non-school education was the highest, just as in the fiscal2015 survey. This trend has become even more marked in the fiscal2018 survey but, just as in the case of the number of institutions, the increase in the number of Japanese-language teachers in private sector institutions, etc. in the Asian region is affecting the result. Regarding the number of learners, the results are primary education, 338,667 people; secondary education, 1,697,290 people; higher education, 978,879 people; and non-school education, 836,938 people, so, just as in the case of the number of institutions, the percentage accounted for by the secondary educational stage is the highest. Unsurprisingly, the number of learners is also growing in the category of non-school education, but the number of learners also increased by more than 20% in primary education, following on from a similar increase in the fiscal2015 survey.

Graph I-3-1 Percentages of the number of institutions/number of teachers/number of learners by educational stage

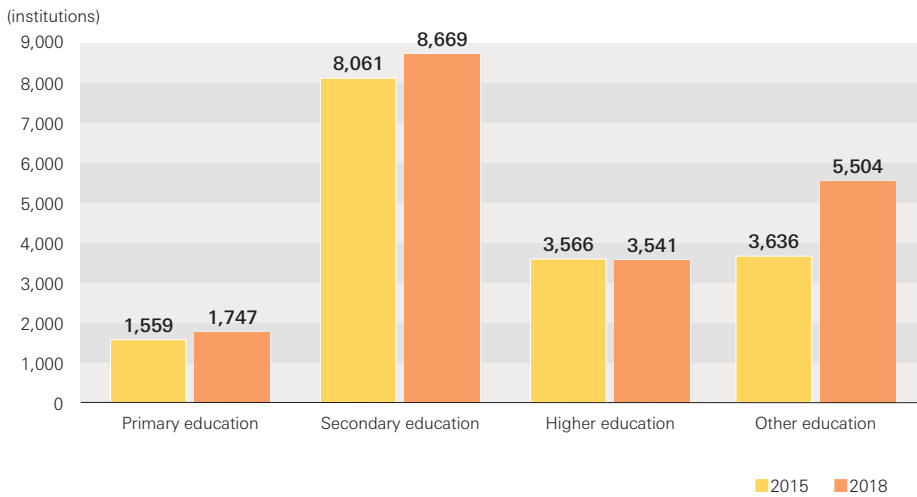


<The number of institutions and the number of teachers by educational stage>

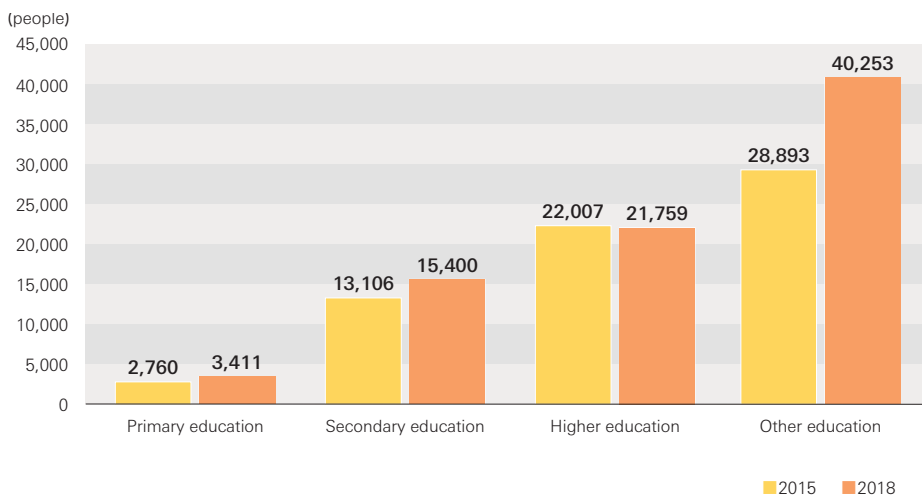
In the fiscal2018 survey, in order to ascertain the scale and situation of Japanese-language education at each educational stage more accurately, for the institutions that Japanese-language learners enroll in across multiple educational stages (“multiple educational stage

institutions” in the fiscal2015 survey), we have recorded the number of institutions and the number of teachers for each stage at the time of tabulation. For that reason, the sums of the number of institutions and the number of teachers at each educational stage do not necessarily match the total number for the world overall.

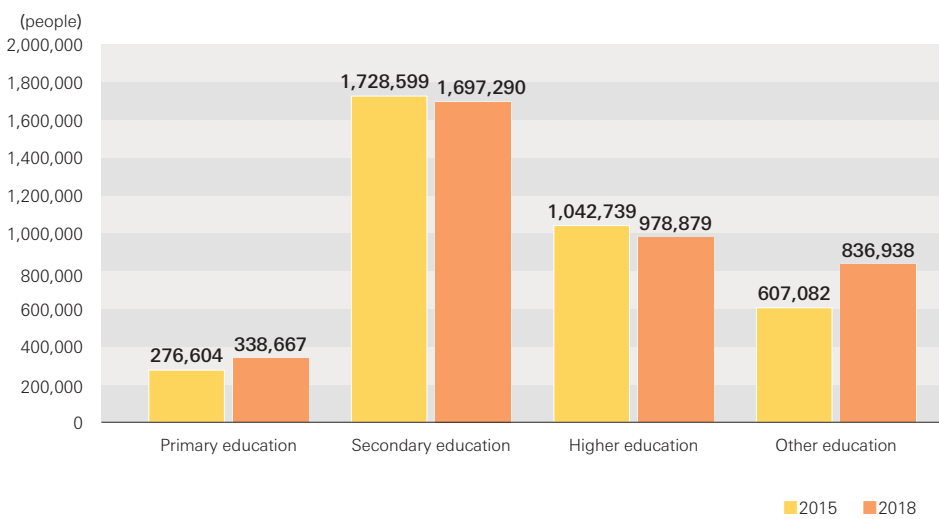
Graph 1-3-2 Number of Institutions by educational stage (Comparison with fiscal2015)



Graph 1-3-3 Number of Teachers by educational stage (Comparison with fiscal2015)



Graph 1-3-4 Number of Learners by educational stage (Comparison with fiscal2015)



Key points regarding the situation by educational stage

The primary educational stage is small-scale compared to the other categories but, just as in the previous survey, the number of institutions, the number of teachers, and the number of learners have all increased. In particular the number of learners recorded a large increase of more than 20% compared to the previous survey. The large increase in learners in primary education in Australia and India had an effect on this. Furthermore, in Vietnam, which had not implemented Japanese-language education in primary education previously, Japanese-language education has been newly introduced on a trial basis as a second foreign language in some primary schools. In the previous survey, the effect of foreign-language education starting from an earlier age globally was detected, but whether or not people who had an opportunity to learn the Japanese language from an early age continued learning is greatly influenced by whether or not there is subsequent follow-up, the learning environment, etc.

At the secondary educational stage both the number of institutions and the number of teachers increased, but the number of learners recorded a slight decrease. In Taiwan and the Republic of Korea, etc. the populations of the generations that receive secondary education decreased due to the rapidly falling birth rate, and that affected the results; furthermore, the substantial fall in the number of learners in countries and regions with large-scale Japanese-language education in secondary education had a major influence. For example, following on from the previous survey, the number of learners continued to decrease against the background of revisions of curricula as seen in Indonesia.

In the higher educational stage, the results showed that the number of institutions, the number of teachers, and

the number of learners all declined slightly compared to the previous survey. In particular in the East Asia region, including China, Taiwan, the Republic of Korea, etc., the size of the decrease in the number of learners in higher education was comparatively large. There are a variety of factors behind this. For example, in these countries and regions the population itself of people at the age for higher education is gradually declining due to the falling birthrate, and in addition more importance is being placed on English as a skill necessary for graduates in the job market, and Japan-related academic departments, etc. have been integrated into other academic departments and shrunk, etc. due to the influence of policies aiming to abolish or integrate humanities faculties to increase the quota of students in science and engineering.

In the category of non-school education, the number of institutions, the number of teachers, and the number of learners have all recorded large increases since the previous survey. The results in the Asia region have largely influenced the overall results, but the popularity of travel to Japan in the East Asian region and the increase in employment opportunities in Japan centered on Southeast Asia are also factors.

Note that non-school education has increased in the same way in North and Central America and Western Europe, etc. as well, so the results suggest that Japanese-language education is thriving in this category worldwide. This category includes private-sector language schools and lifelong learning institutions, etc. run by local governments and public organizations, so we can also conclude that these results reflect the need for Japanese-language learning among adults.

4. Situation of teachers

The number of learners per teacher is 49.8 people and the percentage of Japanese-language teachers who are native speakers is 21.0%

The number of learners per teacher averaged 49.8 people worldwide in the fiscal2018 survey, slightly fewer than the 57.0 people in the fiscal2015 survey. Furthermore, the number of teachers per institution is 4.1 people, a slight increase from the 4.0 people in the fiscal2015 survey. The

number of Japanese-language teachers who are native speakers increased from 14,301 people in 2015 to 16,252 people while on the other hand the percentage of Japanese-language teachers who are native speakers declined from 22.3% to 21.0%.

Table 1-4-1 Number of teachers per institution and number of learners per teacher

| | Teachers (People) | Institutions (Institutions) | Learners (People) | Teachers per institution (People) | Learners per teacher (People) |
|----------------------------|-------------------|-----------------------------|-------------------|-----------------------------------|-------------------------------|
| 2018 | 77,323 | 18,661 | 3,851,774 | 4.1 | 49.8 |
| 2015 | 64,108 | 16,179 | 3,655,024 | 4.0 | 57.0 |
| Increase/decrease rate (%) | 20.6 | 15.3 | 5.4 | 2.5 | ▲12.6 |

Table 1-4-2 Number of teachers and number of Japanese-language teachers who are native speakers in the world overall

| | Teachers (People) | Japanese-language teachers who are native speakers | |
|----------------------------|-------------------|--|------|
| | | (People) | (%) |
| 2018 | 77,323 | 16,252 | 21.0 |
| 2015 | 64,108 | 14,301 | 22.3 |
| Increase/decrease rate (%) | 20.6 | 13.6 | |

The greatest number of Japanese-language teachers are in the category of non-school education, and the highest percentage of teachers who are native speakers is in primary education

The number of teachers per institution is highest in non-school education at 7.3 people, followed by higher education, with 6.1 people. On the other hand, it is low in both primary education (2.0 people) and secondary education (1.8 people). These trends were largely the same in the fiscal2015 survey, but the differences between educational stages have become slightly smaller since the previous survey.

The highest percentage of teachers who are native speakers is in primary education at 37.4%, followed by higher education (26.4%), non-school education (20.6%), and secondary education (16.3%). Note that the number of teachers who are native speakers per institution is highest in higher education (1.6 people), followed by non-school education (1.5 people).

Table 1-4-3 Number of teachers and number of Japanese-language teachers who are native speakers per educational stage

| | Institutions (Institutions) | Teachers (People) | Japanese-language teachers who are native speakers (People) | Teachers per institution (People) | Japanese-language teachers who are native speakers per institution (People) | Percentages of Japanese-language teachers who are native speakers in all Japanese-language teachers (%) |
|---------------------|-----------------------------|-------------------|---|-----------------------------------|---|---|
| Primary education | 1,747 | 3,411 | 1,276 | 2.0 | 0.7 | 37.4 |
| Secondary education | 8,669 | 15,400 | 2,516 | 1.8 | 0.3 | 16.3 |
| Higher education | 3,541 | 21,759 | 5,746 | 6.1 | 1.6 | 26.4 |
| Other education | 5,504 | 40,253 | 8,305 | 7.3 | 1.5 | 20.6 |

The greatest number of learners per teacher is in Oceania

The percentage of teachers who are native speakers is highest in North America and Western Europe

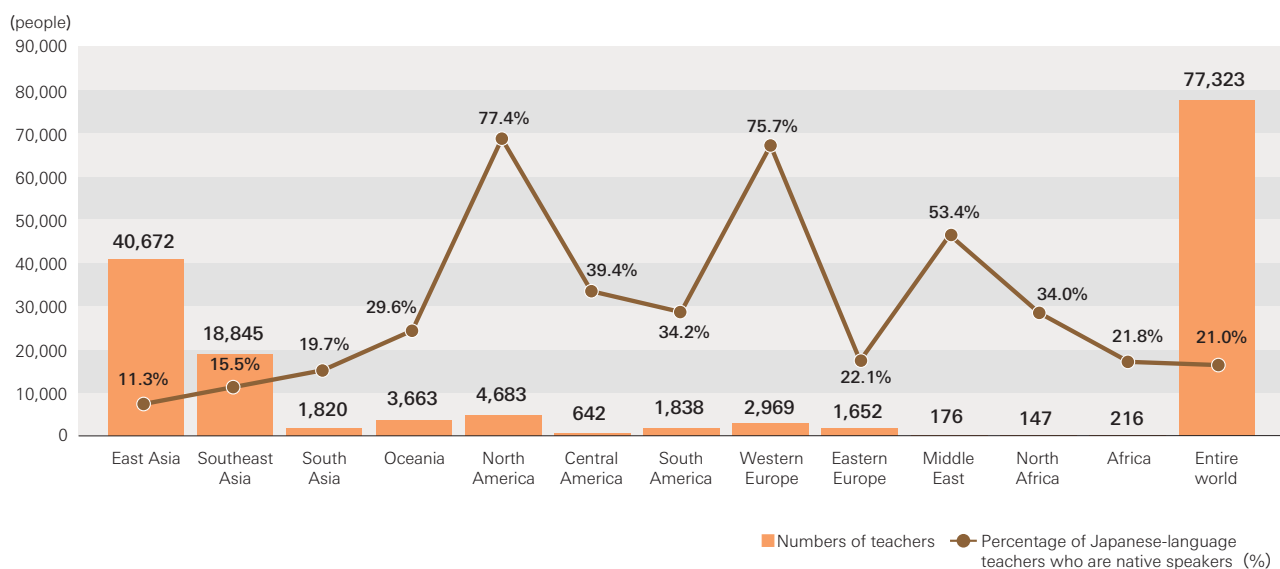
Looking at the results by region, the number of learners per teacher is high in Oceania (121.0 people), followed by Southeast Asia (64.5 people) and Africa (50.0 people). In Southeast Asia the number of teachers has grown greatly in the present survey, so the number of learners per teacher

has also fallen since the previous survey. Furthermore, the percentage of teachers who are native speakers is higher in North America (77.4%) and Western Europe (75.7%), and this trend has been consistent through the surveys in recent years.

Table 1-4-4 Number of teachers and number of Japanese-language teachers who are native speakers by region

| Region | Teachers (People) | Learners (People) | Learners per teacher (People) | Japanese-language teachers who are native speakers | |
|-----------------|-------------------|-------------------|-------------------------------|--|------|
| | | | | (People) | (%) |
| East Asia | 40,672 | 1,744,110 | 42.9 | 4,582 | 11.3 |
| Southeast Asia | 18,845 | 1,215,835 | 64.5 | 2,917 | 15.5 |
| South Asia | 1,820 | 57,356 | 31.5 | 359 | 19.7 |
| Oceania | 3,663 | 443,215 | 121.0 | 1,086 | 29.6 |
| North America | 4,683 | 186,394 | 39.8 | 3,623 | 77.4 |
| Central America | 642 | 17,367 | 27.1 | 253 | 39.4 |
| South America | 1,838 | 42,226 | 23.0 | 629 | 34.2 |
| Western Europe | 2,969 | 90,114 | 30.4 | 2,247 | 75.7 |
| Eastern Europe | 1,652 | 36,836 | 22.3 | 365 | 22.1 |
| Middle East | 176 | 4,948 | 28.1 | 94 | 53.4 |
| North Africa | 147 | 2,569 | 17.5 | 50 | 34.0 |
| Africa | 216 | 10,804 | 50.0 | 47 | 21.8 |
| Entire world | 77,323 | 3,851,774 | 49.8 | 16,252 | 21.0 |

Graph 1-4-1 Number of Japanese-language teachers and percentage of Japanese-language teachers who are native speakers, by region



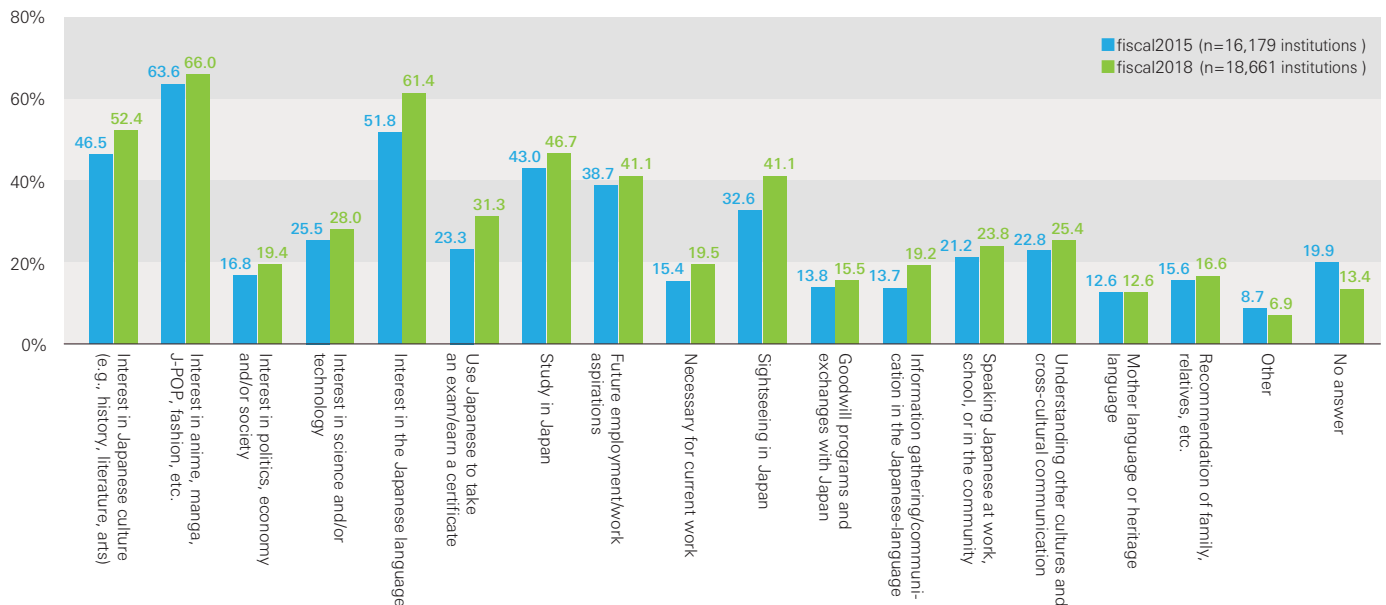
5. Overview of learning objectives and reasons

“Interest in anime, manga, J-POP, fashion, etc.” scores 66.0%, continuing at the top from the previous survey

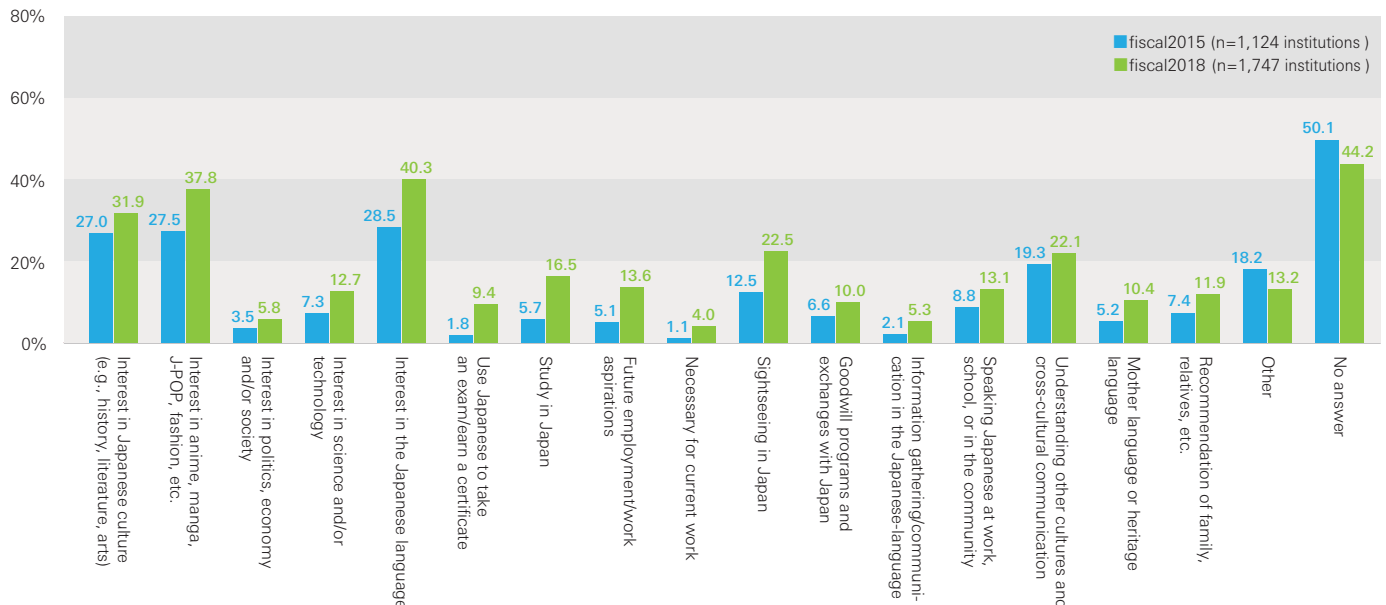
In the fiscal2018 survey, among the items presented as the learning objectives and reasons for learners enrolled in Japanese-language educational institutions around the world, the most common answer was “interest in anime, manga, J-POP, fashion, etc.” (66.0%), and in fact two-thirds of the institutions worldwide gave this answer. This was followed by “interest in Japanese language” (61.4%)

at second place, “interest in history, literature, arts, etc.” (52.4%) in third place, and “study in Japan” (46.7%) in fourth place, and the ranking to here was the same as in the previous survey. In the present survey, growth was largest for the fifth-placed “sightseeing in Japan” (41.1%), which has increased by nearly 10 percentage points since the previous survey.

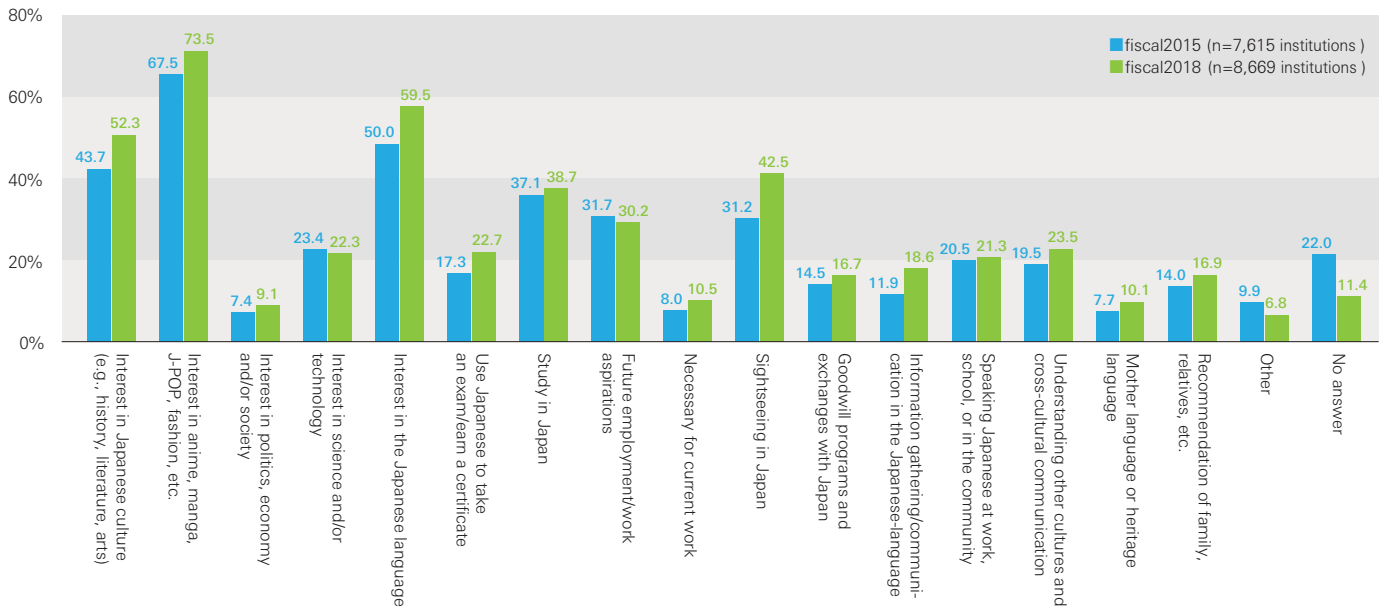
Graph 1-5-1 Objectives of Japanese-language learning (all educational stages)



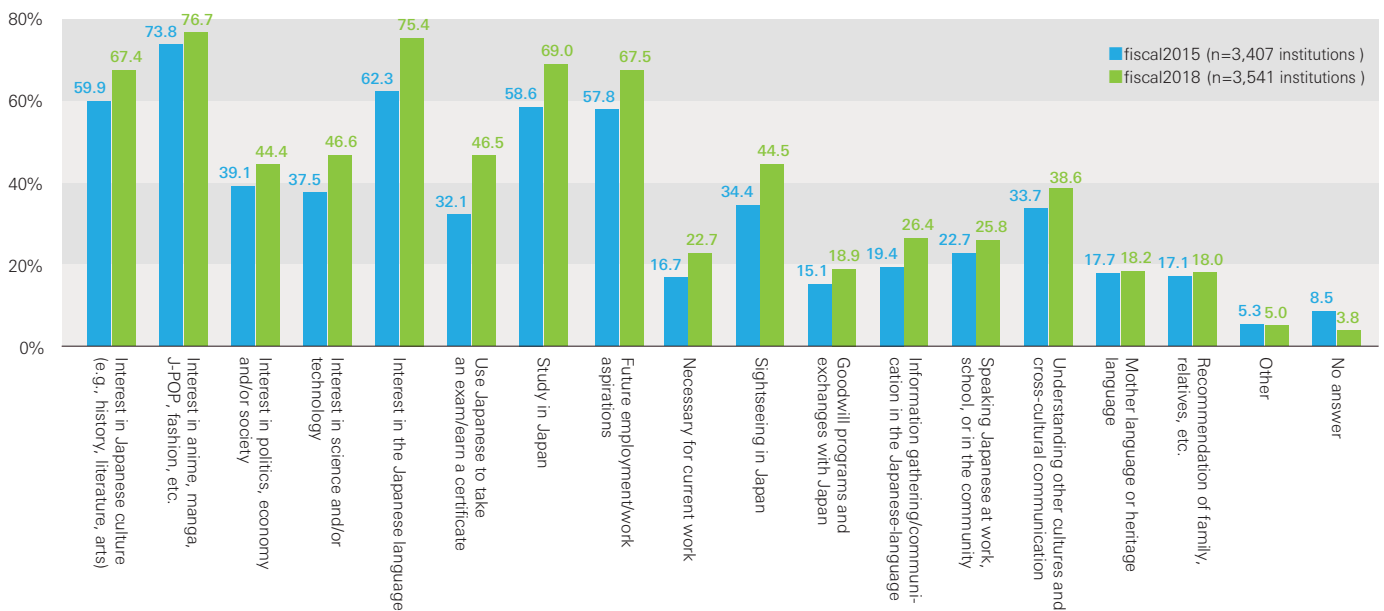
Graph 1-5-2 Objectives of Japanese-language learning (primary education)



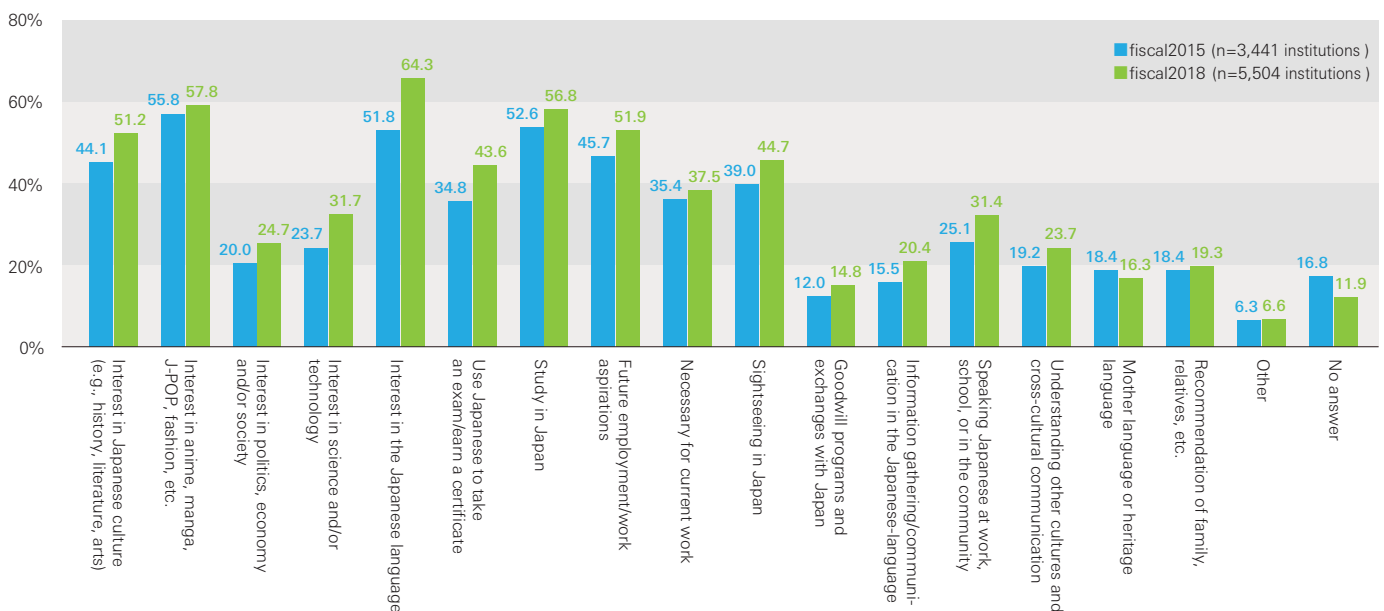
Graph I-5-3 Objectives of Japanese-language learning (secondary education)



Graph I-5-4 Objectives of Japanese-language learning (higher education)



Graph I-5-5 Objectives of Japanese-language learning (non-school education)



Chapter 2 Status of Japanese-language education by region

1. East Asia

The number of learners increased in China, which has the greatest number of learners in the world, exceeding 1,000,000 people again. The number of learners decreased in the Republic of Korea and Taiwan, affected by the falling birthrate, etc.

Status of Japanese-language education in East Asia

The number of institutions in East Asia overall is 6,483 institutions (up 8.4%), the number of teachers is 40,672 people (up 7.4%), and the number of learners is 1,744,110 people (down 1.1%), so the number of institutions and the number of teachers increased compared to the fiscal2015 survey, while on the other hand the number of learners declined slightly. Despite that, the number of learners in East Asia still accounted for approximately 45.3% in the world overall.

The number of institutions is highest in the Republic of Korea (2,998), followed by China (2,435) and Taiwan (846). The number of teachers is highest in China (20,220 people), followed by the Republic of Korea (15,345 people) and Taiwan (4,106 people). The greatest number of learners is in China (1,004,625 people, 57.6% of the region overall), followed by the Republic of Korea (531,511 people, 30.5%)

and Taiwan (170,159 people, 9.8%). These three regions alone account for 97.8% of the learners in East Asia, and this figure has hardly changed from the 98.1% in the previous survey, but the number of learners in China has increased by approximately 50,000 people, while on the other hand they decreased by approximately 25,000 people in the Republic of Korea and approximately 50,000 people in Taiwan, so changes to the breakdown of learners in East Asia have been seen.

Regarding the number of learners in the East Asia region, looking at the percentage by educational stage, primary education is low at 0.6%, secondary education is 32.2%, higher education is 39.8%, and non-school education is 27.3%, so compared to the fiscal2015 survey the percentage for higher education decreased by 4.6 percentage points while on the other hand non-school education increased by 5.5 percentage points.

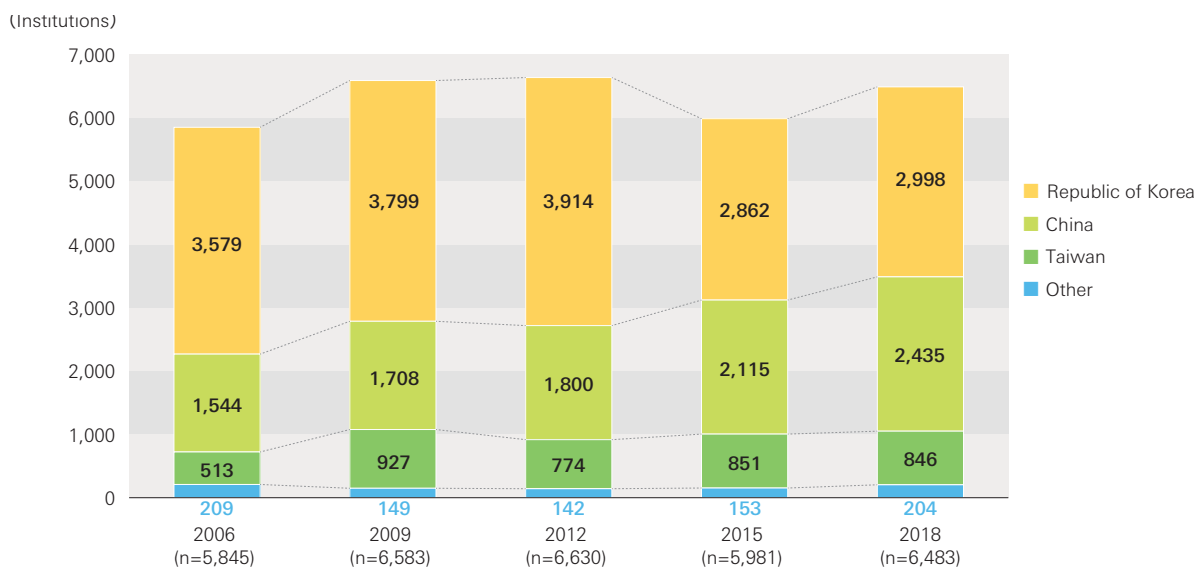
Table 2-1-1 Number of institutions, number of teachers, and number of learners in East Asia

| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|--------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| China | 2,115 | 18,312 | 953,283 | 2,435 | 20,220 | 1,004,625 | 75.0 | 3,892 | 90,109 | 575,455 | 335,169 | 1,339,724,852 |
| Republic of Korea | 2,862 | 14,855 | 556,237 | 2,998 | 15,345 | 531,511 | 1,040.8 | 480 | 411,255 | 39,774 | 80,002 | 51,069,375 |
| Taiwan | 851 | 3,877 | 220,045 | 846 | 4,106 | 170,159 | 721.4 | 2,574 | 54,551 | 70,433 | 42,601 | 23,588,932 |
| Hong Kong | 70 | 523 | 22,613 | 70 | 575 | 24,558 | 334.7 | 927 | 2,031 | 5,694 | 15,906 | 7,336,585 |
| Mongolia | 76 | 253 | 9,914 | 128 | 363 | 11,755 | 444.1 | 2,755 | 3,845 | 2,738 | 2,417 | 2,647,199 |
| Macao | 7 | 48 | 1,328 | 6 | 63 | 1,502 | 240.1 | 0 | 0 | 658 | 844 | 625,674 |
| East Asia overall | 5,981 | 37,868 | 1,763,420 | 6,483 | 40,672 | 1,744,110 | 122.4 | 10,628 | 561,791 | 694,752 | 476,939 | 1,424,992,617 |

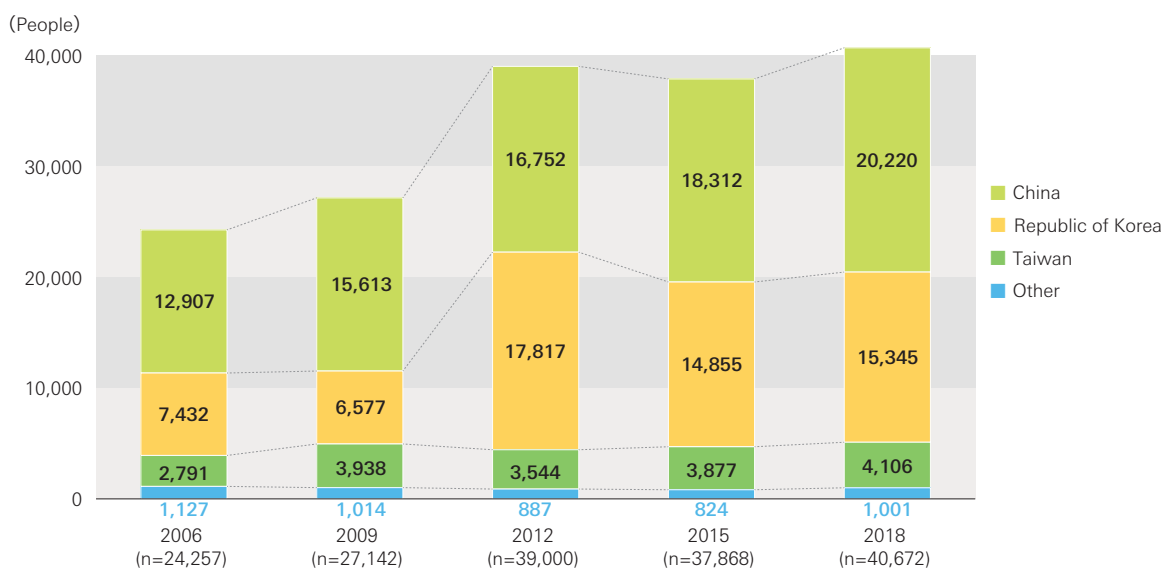
Source: *Population and Vital Statistics Report 2019*, by United Nations

(Only the data of Taiwan was quoted for December 2018 figures, from the homepage of the Department of Statistics, Taiwan Ministry of the Interior)

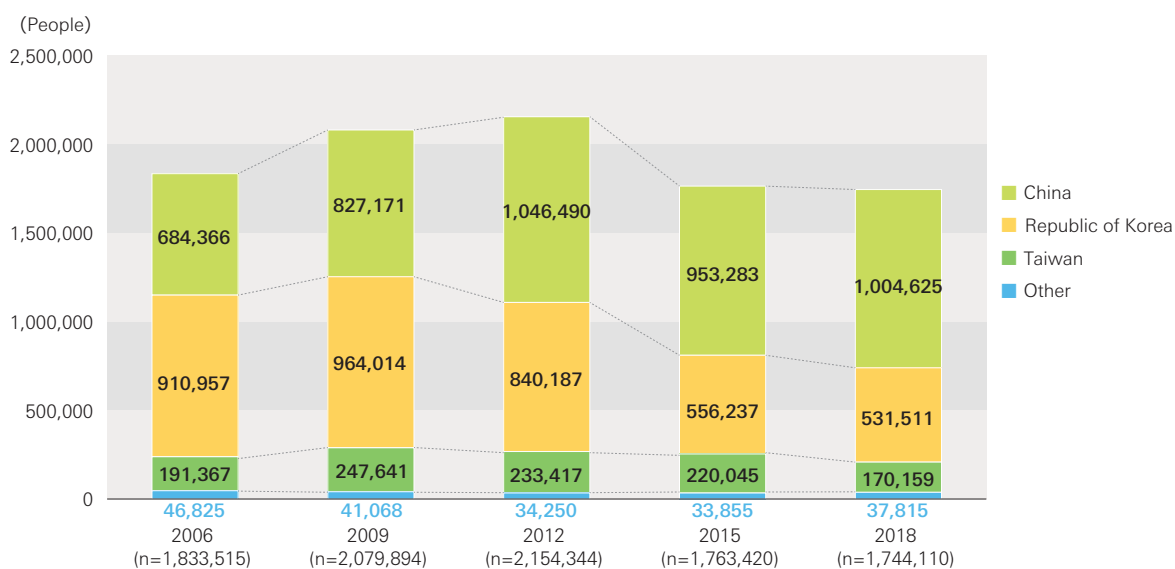
Graph 2-1-1 Number of Institutions in East Asia



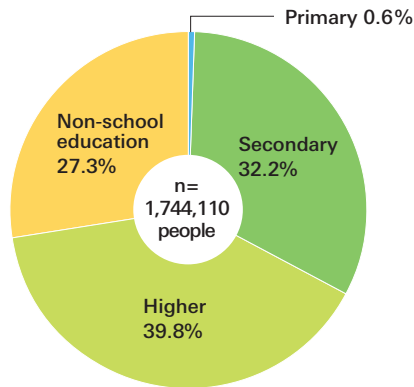
Graph 2-1-2 Number of Teachers in East Asia



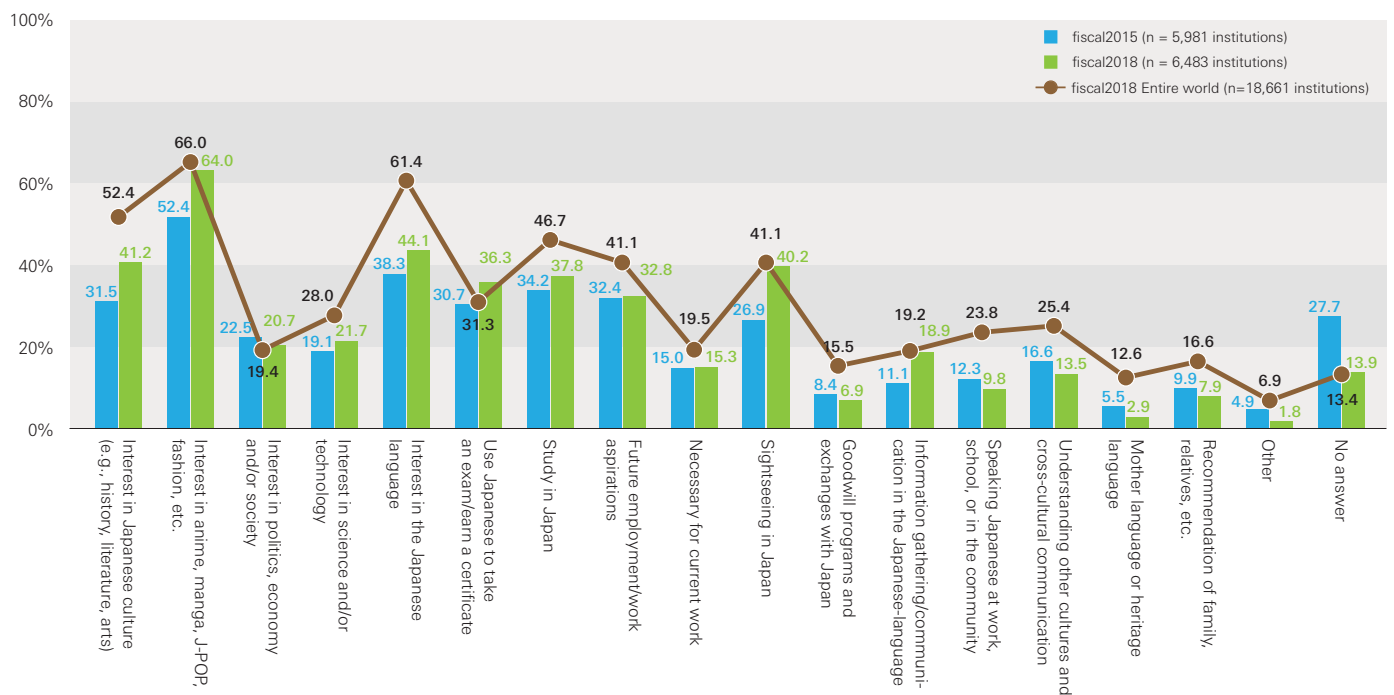
Graph 2-1-3 Number of Learners in East Asia



Graph 2-1-4 Percentages of learners by educational stage in East Asia



Graph 2-1-5 Objectives of Japanese-language learning in East Asia



Trends in each country and region

[China]

In China, which has the greatest number of learners in the world, the number of institutions, the number of teachers, and the number of learners all increased compared to the fiscal2015 survey. Looking at the results by educational stage, in primary education the scale itself is not large, but the rate of increase of each item was the highest of all of the educational stages. Examples of Japanese-language classes being established from primary education onwards with the objective of the prior introduction of Japanese-language education in education that fosters an international perspective from early childhood and

in secondary education can be seen in multiple regions. Until now Japanese-language teaching materials for primary-school students were only published by publishing companies at the local level, but in 2017 teaching materials for primary-school students called “Easy Japanese for Primary-School Students” were published by the People’s Education Press under the umbrella of the Ministry of Education of China.

Furthermore, in secondary education as well, the number of institutions, the number of teachers, and the number of learners all recorded large increases. One reason for this is the increase in the number of students selecting Japanese

as the foreign-language subject in their university entrance exams because Japanese is comparatively easy to learn for Chinese speakers. This trend is particularly marked in the southern region (Guangdong Province, Guizhou Province, Jiangsu Province, Zhejiang Province, etc.) where the number of learners has increased markedly. On the other hand, in higher education, the number of institutions, the number of teachers, and the number of learners all decreased from the previous survey, although there were differences in the extent of the decrease. The background to this is the reorganization and integration of academic departments, which had become disorderly at one time, and also the fact that English has continued to be regarded as the most important of the skills necessary in the job market for university graduates and above, so cases in which students who took their university entrance exams in the Japanese language did not continue learning it after entering university are often seen.

In the category of non-school education, the number of institutions, the number of teachers, and the number of learners have all increased. Furthermore, against the background of the increase in tourists visiting Japan due to the depreciation of the yen, relaxation of conditions for getting visas, etc., the number of learners in private-sector educational institutions, etc., including adults, have increased, and the number of people learning the Japanese language in order to gain a promotion or take exams to gain a variety of qualifications has continued to grow.

[The Republic of Korea]

In the Republic of Korea, the number of institutions and the number of teachers increased slightly while on the other hand the number of learners declined slightly. Looking at the results by educational stage, the number of learners in the category of non-school education increased, while on the other hand, in each stage from primary education to higher education, in other words, among the young learners, it has decreased since the previous survey. The fact that due to the rapidly falling birthrate the absolute number of students from primary education to higher education is itself decreasing is the main factor in the decrease in the number of learners. Other reasons for the decrease are that the Republic of Korea made efforts to start English education earlier and gives it greater priority in reforms to the school educational system, and in addition in the revised education curriculum in secondary education introduced in 2011, second foreign-languages, including the Japanese language, were changed from compulsory subjects to elective subjects. Furthermore, in

higher education, the higher education policy called the Prime program (a policy to reduce the number of students in humanities, arts, and physical education academic departments and instead increase the quota of science and engineering students) announced by the Ministry of Education of the Republic of Korea in 2016 accelerates the integration and abolition of humanities faculties. Due to these measures, cases are being seen of Japanese studies departments, etc. being integrated into other academic departments, shrinking their quota of students, and it is thought that the number of learners of the Japanese language has decreased as a consequence of this.

On the other hand, the number of learners in the category of non-school education, including private-sector Japanese-language schools, etc., increased by nearly 30,000 people from the previous survey. The background to this is that recent graduates are aiming to get jobs in Japan due to the severity of the employment situation for recent graduates in the Republic of Korea, and so the number of students studying in Japan with this goal in mind is increasing. Looking at other indicators, the number of people applying to take the Japanese-Language Proficiency Test (JLPT) in the Republic of Korea has continued to increase since it bottomed out in 2015, and in 2018 it exceeded 100,000 people a year for the first time since 2011. Furthermore, the number of people applying to take the Examination for Japanese University Admission for International Students (EJU) in the Republic of Korea reached 9,000 people in 2018, 45% higher than the previous year and setting a new all-time record by a huge margin. Furthermore, it is thought that the fact that in fiscal 2018, the year of the survey, the number of people travelling to Japan for the purpose of tourism reached an all-time high is also a factor behind the increase in the number of learners in non-school education.

Japanese-language learners have decreased in the country overall while on the other hand the number of institutions and the number of teachers have increased slightly since the previous survey. Although the number of students, particularly in secondary and higher education, has been decreasing, this does not mean that subjects can be abolished and faculty staff can be fired immediately as a result; furthermore, in the category of non-school education, there was large growth in the number of institutions and the number of teachers for the above reasons, so for the country overall the result was an increase. Note that in the period from 2016 to 2018 the Japanese-language faculty staff recruitment exams in public secondary educational institutions, which had been suspended for 5 years until then, were implemented again.

[Taiwan]

In Taiwan, the number of teachers increased by 5.9% but the number of institutions declined slightly, by 0.6%, and the number of learners decreased by 22.7% compared to the previous survey. Looking at the increases and decreases in the number of learners by educational stage, in the category of non-school education the number of learners increased slightly, but it decreased in all of the stages from primary education to higher education, and in particular the number of learners in secondary education and higher education, which accounts for three-quarters of Japanese-language learners, decreased by nearly 30% compared to the previous survey.

In secondary education, the number of institutions was largely unchanged whereas there was a large decrease in the number of learners, but it is thought that the main reasons for this are the decrease in the number of classes provided and the smaller class sizes. Taiwan is a region with one of the lowest birthrates in the world, but in addition to the rapidly falling birthrate it is thought that another reason for this result is that there are increasing cases of orientation toward other foreign-languages, in particular English, in the formulation of curricula by schools and the selection of subjects by students.

Furthermore, unsurprisingly, the decrease in the population of the generation that goes to university due to the falling birthrate, and the resulting succession of integrations and abolitions of universities, faculties, and academic departments is in the background to the decrease in higher education, which accounts for 40% of learners. There are 29 fewer higher educational institutions actually implementing Japanese-language education, a 17% decrease from the previous survey. Furthermore, another factor is that the population of young people, the major demographic among the learners, is continuing to decrease rapidly every year and in that context, universities are adopting the survival strategy of shifting their priorities away from liberal arts subjects such as languages, etc., toward more pragmatic subjects.

On the other hand, in the category of non-school education, the number of institutions, the number of teachers, and the number of learners have all increased slightly since the previous survey. This is linked to the increase in people visiting Japan from Taiwan with for tourism and people utilizing working holidays to stay in

Japan, and the percentage of people who actually selected “sightseeing in Japan” in the question about learning objectives and reasons was even higher than China and the Republic of Korea, which similarly recorded many tourists visiting Japan in fiscal2018. There is a wide range of age groups from young people to the elderly, which is deserving of attention in the context of the trend that the number of learners in school education is decreasing.

[Hong Kong]

Regarding Hong Kong, there was no change in the number of institutions from the previous survey, but the number of teachers and the number of learners have increased by just under 10% since the previous survey. Among all of the educational stages, the number of learners is increasing in secondary education and higher education, but the number of learners has increased in higher education in particular, with an increase of more than 50% compared to the previous survey. In secondary education as well the number of learners has increased by more than 20%, and the number of people studying the Japanese language in the comparatively young generations is increasing. The factors behind this increase in learners in the young generations are: (1) opportunities to encounter “Japan” in a natural way exist in daily life, for example, people routinely view the anime, dramas, etc., of Japan from a young age; and (2) Japan is the most popular travel destination after Taiwan (in 2019 a total of more than 2,290,000 people), etc. This trend can also be seen from the fact that the number of working holiday visas issued more than doubled from 239 in 2015 to 571 in 2018, etc.

[Mongolia]

In Mongolia, the number of institutions is up 68.4%, the number of teachers is up 43.5%, and the number of learners is up 18.6%, so the increasing trend has continued from the fiscal2015 survey. In particular, the increase in the category of non-school education was marked, with the number of institutions, the number of teachers, and the number of learners all more than doubling compared to the previous survey. The background to this is the increase in learners who have the objective of visiting Japan utilizing the technical internship system, etc., and the fact that in response to this many Japanese-language schools and language centers have been newly established locally.

2. Southeast Asia

There has been a large increase in the number of learners in Vietnam and Myanmar, etc., but Indonesia, the country with the most Japanese-language education in the region, declined slightly

Status of Japanese-language education in Southeast Asia

The number of institutions in Southeast Asia overall is 5,388 institutions (up 37.7%), the number of teachers is 18,845 people (up 82.0%) and the number of learners is 1,215,835 people (up 11.1%), so all of these figures have increased compared to the fiscal2015 survey.

The country with the greatest number of institutions is Indonesia (2,879), followed by Vietnam (818) and Thailand (659). The order for the number of teachers is Vietnam (7,030 people), Indonesia (5,793 people) and Thailand (2,047 people). Regarding the number of learners, the order is Indonesia (709,479 people), Thailand (184,962 people) and Vietnam (174,521 people), and the order of the rankings is slightly different for the number of institutions, the number of teachers, and the number of learners. The number of learners in Indonesia accounts for 58.4% of the learners in Southeast Asia overall, but this percentage has decreased by approximately 10% compared to the fiscal2015 survey. Looking at the number of learners compared to the previous survey for each country, in Indonesia the number

of learners has gone down 4.8%, but in Vietnam it has gone up 169.1% and in Myanmar it has gone up 215.0%, so the rise in enthusiasm for learning the Japanese language is particularly marked in these two countries.

Looking at the percentage by educational stage of the number of learners in the Southeast Asia region, primary education is low with 1.3% and secondary education accounts for the majority with 70.3%, but it has decreased from 78.2% in the fiscal2015 survey. Higher education is largely unchanged from the previous survey with 9.5%, but non-school education institutions are 18.9%, an increase of 7.7 percentage points from the previous survey.

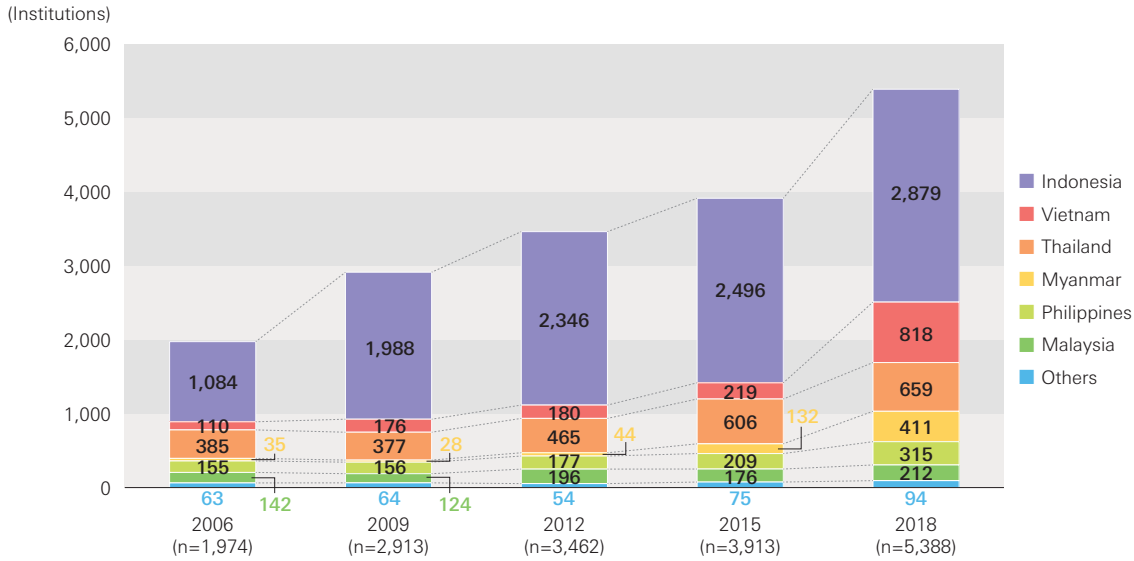
Regarding Japanese-language education in Southeast Asia, the Japan Foundation commenced the dispatch of NIHONGO Partners to secondary educational institutions, etc. in the 10 ASEAN countries in 2014. In the 5 years up until fiscal2018 when the survey was conducted, a cumulative total of 1,506 people were dispatched, and they served as assistants in Japanese-language classes and presented the Japanese culture.

Table 2-2-1 Number of institutions, number of teachers, and number of learners in Southeast Asia

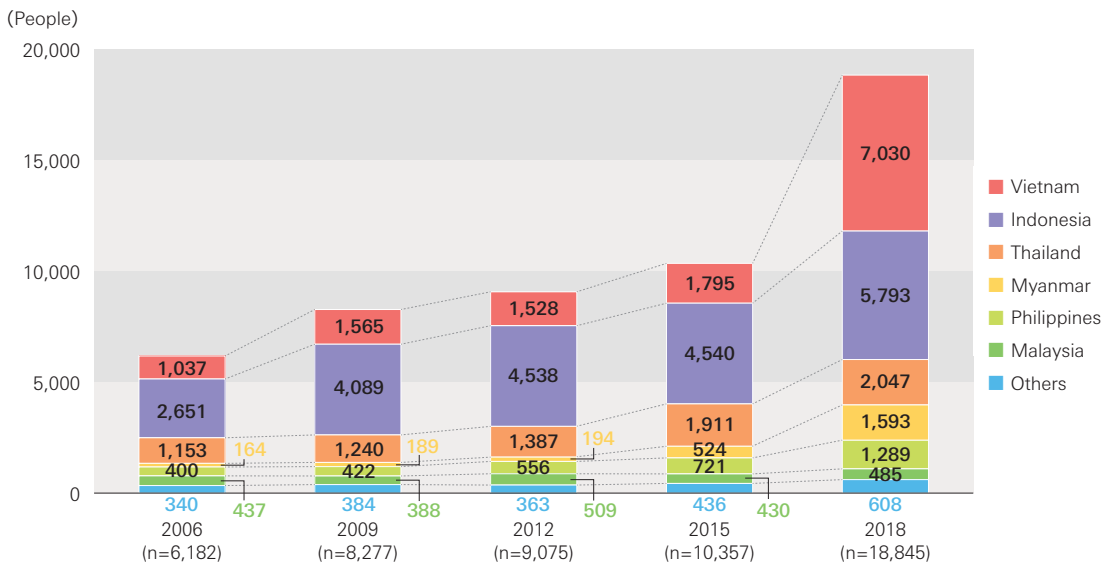
| Country and region | 2015 | | | 2018 | | | | | | | Population* (People) | |
|-------------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|--------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| Indonesia | 2,496 | 4,540 | 745,125 | 2,879 | 5,793 | 709,479 | 298.6 | 7,148 | 650,215 | 28,799 | 23,317 | 237,641,326 |
| Thailand | 606 | 1,911 | 173,817 | 659 | 2,047 | 184,962 | 280.3 | 4,028 | 143,872 | 20,506 | 16,556 | 65,981,659 |
| Vietnam | 219 | 1,795 | 64,863 | 818 | 7,030 | 174,521 | 203.3 | 2,054 | 26,239 | 31,271 | 114,957 | 85,846,997 |
| Philippines | 209 | 721 | 50,038 | 315 | 1,289 | 51,530 | 51.0 | 1,217 | 11,412 | 13,508 | 25,393 | 100,979,303 |
| Malaysia | 176 | 430 | 33,224 | 212 | 485 | 39,247 | 138.5 | 45 | 19,417 | 14,720 | 5,065 | 28,334,135 |
| Myanmar | 132 | 524 | 11,301 | 411 | 1,593 | 35,600 | 69.1 | 21 | 23 | 1,760 | 33,796 | 51,486,253 |
| Singapore | 30 | 227 | 10,798 | 19 | 221 | 12,300 | 326.1 | 394 | 1,457 | 4,056 | 6,393 | 3,771,721 |
| Cambodia | 29 | 157 | 4,009 | 51 | 307 | 5,419 | 40.5 | 35 | 1,205 | 931 | 3,248 | 13,395,682 |
| Laos | 14 | 49 | 1,046 | 16 | 58 | 1,955 | 30.1 | 312 | 785 | 173 | 685 | 6,492,228 |
| East Timor | - | - | - | 6 | 17 | 651 | 55.0 | 0 | 0 | 70 | 581 | 1,183,643 |
| Brunei | 2 | 3 | 216 | 2 | 5 | 171 | 43.5 | 0 | 0 | 121 | 50 | 393,372 |
| Southeast Asia overall | 3,913 | 10,357 | 1,094,437 | 5,388 | 18,845 | 1,215,835 | 204.2 | 15,254 | 854,625 | 115,915 | 230,041 | 595,506,319 |

Source: Population and Vital Statistics Report 2019, by United Nations

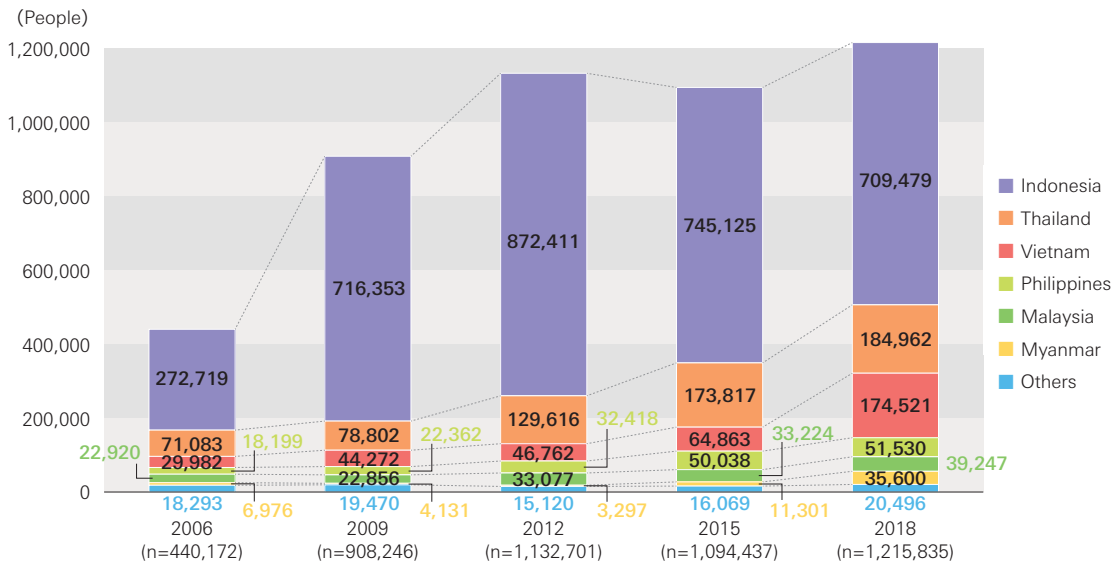
Graph 2-2-1 Number of Institutions in Southeast Asia



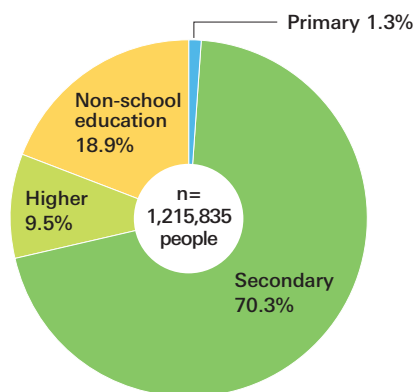
Graph 2-2-2 Number of Teachers in Southeast Asia



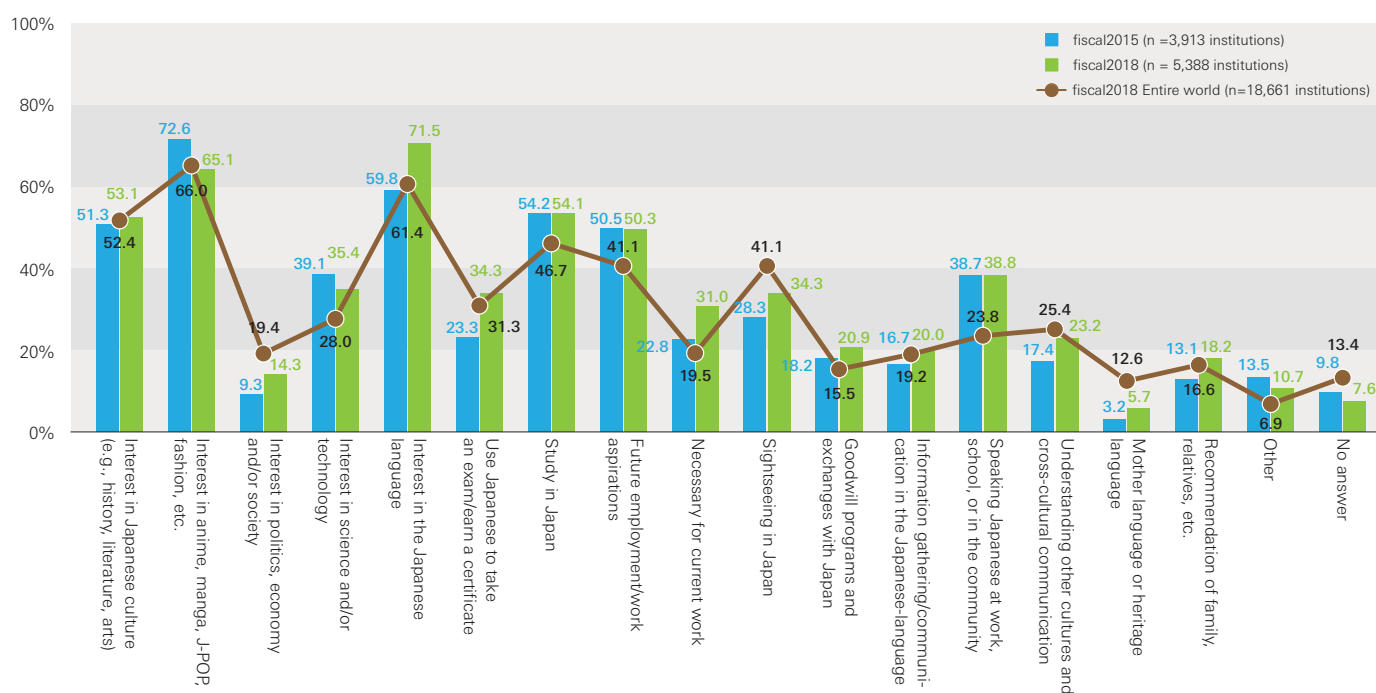
Graph 2-2-3 Number of Learners in Southeast Asia



Graph 2-2-4 Percentages of learners by educational stage in Southeast Asia



Graph 2-2-5 Objectives of Japanese-language learning in Southeast Asia



Trends in each country

[Indonesia]

Just as in the fiscal2015 survey, in Indonesia, which has the second greatest number of learners in the world, the number of institutions and the number of teachers increased while on the other hand the number of learners has decreased since the previous survey. Looking at the results by educational stage, the number of institutions, the number of teachers, and the number of learners all increased in primary, higher and non-school education, but in secondary education, which offers the largest scale Japanese-language education in this country, the number of learners decreased again as in the previous survey. It is thought that the reason for the decrease in the number of learners was that in this country the number of learners in

secondary education accounts for more than 90% of the learners overall, but due to the revision of the education curriculum in 2013, studying a second foreign-language, which had been a compulsory subject, became an elective subject and since then some secondary educational institutions have cancelled Japanese-language classes or reduced class sizes, etc. However, the size of the decrease in the number of learners was small compared to the fiscal2015 survey, so we can also infer that the decrease in the number of learners is slowing down.

Primary education does not account for a very large percentage of Japanese-language education in the country overall, but the number of institutions, the number of teachers, and the number of learners have all increased

since the previous survey. Learners in primary education are concentrated in West Java province and Bali province, but the number of learners decreased by approximately 2,600 people due to the impact of the fact that there were several public primary schools with a large number of pupils that cancelled their Japanese-language classes in West Java province, where the number of learners in primary education was greatest in the previous survey. On the other hand, in Bali province, Japanese-language classes were newly confirmed in several primary schools affiliated with universities in the province, so the number of learners increased by approximately 3,800 people.

There are similar differences for each region in higher education, but the number of learners has increased in the Special Capital Region of Jakarta and West Java province where there are large numbers of learners, so it has increased compared to the previous survey for the country overall.

In the category of non-school education, which includes private-sector Japanese-language schools and training institutions, etc., cases in which Indonesian people who have the education of a high-school graduate or equivalent learn the Japanese language at private-sector institutions for a short period and then utilize a technical internship system, etc., to go to Japan have been confirmed. The number of learners in this category is nearly three times the number in the previous survey, and many provinces in which the increase in the number of learners is particularly marked have been seen in the regions as well. From fiscal2019 a new residency status, Specified Skilled Worker, was established in Japan, so it is expected that the number of people coming to Japan for the purpose of work will increase, and there is a possibility that the number of Japanese-language learners will also increase as a consequence of that.

[Thailand]

In Thailand, as in the fiscal2015 survey, the number of institutions, the number of teachers, and the number of learners all increased. Comparing the number of learners by educational stage with the fiscal2015 survey, the number of learners increased in primary education and secondary education, while on the other hand it decreased in higher education and the category of non-school education.

Primary education is not a very large proportion of Japanese-language education in the country overall, but the number of institutions, the number of teachers, and the number of learners all increased slightly compared to the previous survey. In primary education, there are some

international schools and university-affiliated primary schools, etc., that are providing education in second foreign-languages in addition to English in early childhood.

In secondary education, which accounts for nearly 80% of the number of learners in the country overall, the number of learners has increased by approximately 25%, or in terms of the number of people by nearly 30,000 people, since the previous survey. It is thought that the increase in the number of World Class Standard Schools (WCSSs), which the Thai Ministry of Education has been establishing since 2010 with the objective of raising the educational level of secondary educational institutions to meet the requirements of internationalization, has contributed to this. The characteristic feature of the WCSSs is that they offer cross-curricular education enabling the study of second foreign-languages in not only the humanities subjects but also in science subjects. Furthermore, the assignment to public secondary educational institutions of approximately 200 students who completed the “Japanese-language teacher training for public servants in Thailand secondary education” implemented by the Thai Ministry of Education with the Japan Foundation over 4 years from 2013, and the new establishment and expansion of Japanese-language classes at each school has also had an effect. In addition, since the previous survey in fiscal2015, the Japan Foundation has dispatched 60 to 80 NIHONGO Partners to secondary educational institutions in each region every year, and the fact that some schools launched new Japanese-language classes and clubs is also one factor behind the increase in the number of learners in this category.

On the other hand, all of the items have decreased in higher education. The reasons for this include the fact that cases in which securing Japanese-language teachers has become more difficult than before due to budget reductions in the institutions have been seen, and furthermore the cancellation or reduction of classes, primarily in regional universities which had been maintaining their Japanese-language courses with few human resources in the first place. Furthermore, the fact that the number of university students in Thailand overall is decreasing due to the falling birthrate is also an underlying cause.

Finally, the number of learners has decreased by approximately 45% compared to the previous survey in the category of non-school education as well.

[Vietnam]

In Vietnam, against a background of good Japan-Vietnam

relations and due to the active expansion of Japanese-language education by the Government of Vietnam, etc., the number of institutions, the number of teachers, and the number of learners all recorded large increases in all of the educational stages. However, in many cases the teachers work concurrently in multiple institutions (for example, teachers in primary, secondary, or higher education teaching at private institutions, too, or teaching at more than one private institution, etc.), so in this survey there is a tendency for both the number of teachers and the increase in the number of teachers to appear as numbers larger than the actual situation.

Looking at the results by educational stage, Japanese-language educational institutions were confirmed in primary education, for which implementation was not confirmed in the previous survey. Japan is also supporting Japanese-language education based on the National Foreign Language Project the Government of Vietnam is implementing, and a total of 5 primary schools in Hanoi City and Ho Chi Minh City introduced the Japanese language as the first foreign-language on a trial basis in 2016. Furthermore, in some other regions there are schools that have introduced Japanese-language classes in their extra-curricular activities, etc., so a total of 20 institutions has been reached in primary education overall.

Furthermore, the number of institutions, the number of teachers, and the number of learners has more than doubled compared to the previous survey in secondary education as well, but in addition to the regional expansion we have been able to confirm a large increase in schools introducing Japanese-language education in regions where the Japanese language had already been introduced before. The background to this is that the bureaus of education and training with jurisdiction over secondary education in each region are actively promoting Japanese-language education.

In higher education as well, the number of institutions, the number of teachers, and the number of learners have recorded similar large increases. Previously foreign-language universities were central to the provision of Japanese-language courses, but we have been able to additionally confirm faculties, academic departments and junior colleges that have introduced Japanese-language education in long-term care, nursing, science and engineering and tourism courses, with work in Japan and employment in local Japanese companies in mind.

The greatest rate of increase in all of the educational stages was seen in the category of non-school education, which

accounts for approximately two-thirds of the number of learners in the country overall. The number of learners recorded a large increase of approximately 80,000 people, or 235%, compared to the previous survey, and it is thought that a factor behind this is the large increase in the number of cases of learners that are studying at local Japanese-language schools, etc., because they are hoping to work in Japan, gain employment at local Japanese companies, or go to Japan by utilizing the technical internship system, etc. Institutions offering preparatory education for technical internship and training candidates have been confirmed not only in the major cities of Hanoi City and Ho Chi Minh City but also in regions that had not been implementing Japanese-language education before, and there are also cases of former technical interns who have returned to Vietnam from Japan establishing institutions locally or working as Japanese-language teachers. Furthermore, in addition to the technical interns, the number of companies that are actively increasing the employment of Vietnamese people in job categories such as engineer, etc., is also growing, and employment opportunities in Japan and opportunities to get work at local Japanese companies are rapidly increasing. In these kinds of companies, the number of people who are learning the Japanese language at private-sector language centers, etc. in order to utilize Japanese-language proficiency as a skill for obtaining better benefits is also increasing.

[Philippines]

In the Philippines, the number of institutions, the number of teachers, and the number of learners have all increased. Looking at the results by educational stage, in primary education and secondary education the number of institutions, the number of teachers, and the number of learners all increased. Primary education only accounts for a tiny percentage of Japanese-language education overall, but the implementation of Japanese-language classes at several private schools was confirmed in this survey as well. On the other hand, implementation still could not be confirmed in public schools.

In secondary education, a large expansion has been seen, and the number of institutions, the number of teachers, and the number of learners all increased to nearly double their level from the previous survey. In the Philippines, the “K to 12” policy that extends the basic educational stage by 2 years was enshrined into law in 2013, and a special curriculum including a foreign-language education program as one of the compulsory subjects in public high

schools was established as a study option. Actually, the number of new schools implementing Japanese-language education has increased, but the large majority are foreign-language programs in public high schools, and it is thought the number of learners has grown in proportion to the increase in the number of institutions.

On the other hand, in higher education the result is that the number of institutions, the number of teachers, and the number of learners have all declined slightly since the previous survey. Substantially, they are largely unchanged from the previous survey, but the number of universities with more than 100 students taking courses has decreased since the previous survey. In the category of non-school education, which accounts for approximately half of the number of learners in the country overall, the result was that the number of institutions and the number of teachers recorded large increases. Private sector Japanese-language educational institutions in the Philippines differ in scale, but the number of institutions itself has consistently increased over the last few surveys.

[Malaysia]

In Malaysia, the number of institutions, the number of teachers, and the number of learners have all increased by about 10% to 20% compared to the previous survey. In secondary education, which accounts for half of the number of learners inside the country overall, the number of learners has increased compared to the previous survey. In secondary education in Malaysia, as a part of the Look East Policy, from 1984 Japanese-language education was commenced as an international language elective subject in boarding schools for talented *bumiputera* (Malays and other indigenous people of Malaysia) pupils, and classes in the Japanese language have been implemented as an elective subject in day schools as well since 2005. Since 2017, a new syllabus concerning the Japanese-language curriculum and evaluation standards has also been enforced. The number of learners has similarly increased by nearly 20% in higher education, which accounts for about 40% of the number of learners in the country overall. In higher education, preparatory education for study in Japan aimed at students who have completed their secondary education is being offered in 4 institutions, and in addition Japanese-language education is being offered at the national universities in each region, and the number of such universities has been increasing compared to the previous survey.

On the other hand, the number of teachers in higher education has decreased since the previous survey, and

the lack of teachers has become an issue. In the category of non-school education, the number of learners has increased by more than 50% compared to the previous survey, showing the highest rate of increase among all of the educational stages. Some private-sector Japanese-language schools offering classes utilizing ICT effectively have emerged, and the fact that they have put in place an environment in which working adult students can learn without being bound by place or time is a factor that has boosted the increase in learners.

[Myanmar]

In Myanmar, the results showed the expansion of the scale of Japanese-language education against the background of the entry of Japanese companies in recent years, and other factors, with the number of institutions, the number of teachers, and the number of learners all increasing by more than 200% from the previous survey, and the number of learners rapidly growing to the 12th greatest number in the entire world. Furthermore, the number of people taking the Japanese-Language Proficiency Test increased by approximately 4.5 times from the previous survey. It was confirmed that institutions offering Japanese-language education had appeared for the first time in primary education and secondary education, where Japanese-language education had not been implemented previously, and in addition we were able to confirm new universities implementing Japanese-language education in higher education as well. In the category of non-school education, which accounts for most of the Japanese-language education in the country overall in terms of raw numbers, the number of institutions, the number of teachers, and the number of learners all recorded large increases in this survey as well. Since the transition to civilian rule in 2011, the number of Japanese-language schools has consistently increased.

Previously there were many cases of graduates who had studied at the Yangon University of Foreign Languages or the Mandalay University of Foreign Languages and people who had experienced visiting Japan, etc., holding small-scale classes or serving as home teachers, but in recent years the numbers of schools with financial clout and schools affiliated with Japanese-language schools inside Japan have been increasing. Furthermore, there are many cases of Japanese companies or local companies that trade with Japanese companies offering Japanese-language education to their employees, and institutions that send technical interns to Japan also often offer classes in the Japanese-language.

[Other countries and regions]

In addition, regarding Southeast Asia, in Cambodia and Laos where the scale of Japanese-language education is comparatively small, the result is that the number of institutions, the number of teachers, and the learners have all recorded large increases. Furthermore, in the present

survey, Japanese-language educational institutions were confirmed in East Timor for the first time, and we have confirmed that classes in the Japanese-language are being held in the National University of East Timor and several private-sector institutions.

3. South Asia

The number of learners has increased in India, which has the greatest number of learners in the region, and also in Nepal and Bangladesh

Status of Japanese-language education in South Asia

The number of institutions in South Asia is 604 (up 48.0%), the number of teachers is 1,820 people (up 42.5%), and the number of learners is 57,356 people (up 40.6%), so all of these figures have increased since the fiscal2015 survey.

The country with the greatest number of institutions is India (304), followed by Nepal (126) and Bangladesh (85). The ranking for the number of teachers is the same, in the order of India (1,006 people), Nepal (443 people) and

Bangladesh (220 people). On the other hand, regarding the number of learners the order is India (38,100 people) followed by Sri Lanka (8,454 people), followed by Nepal (5,326 people).

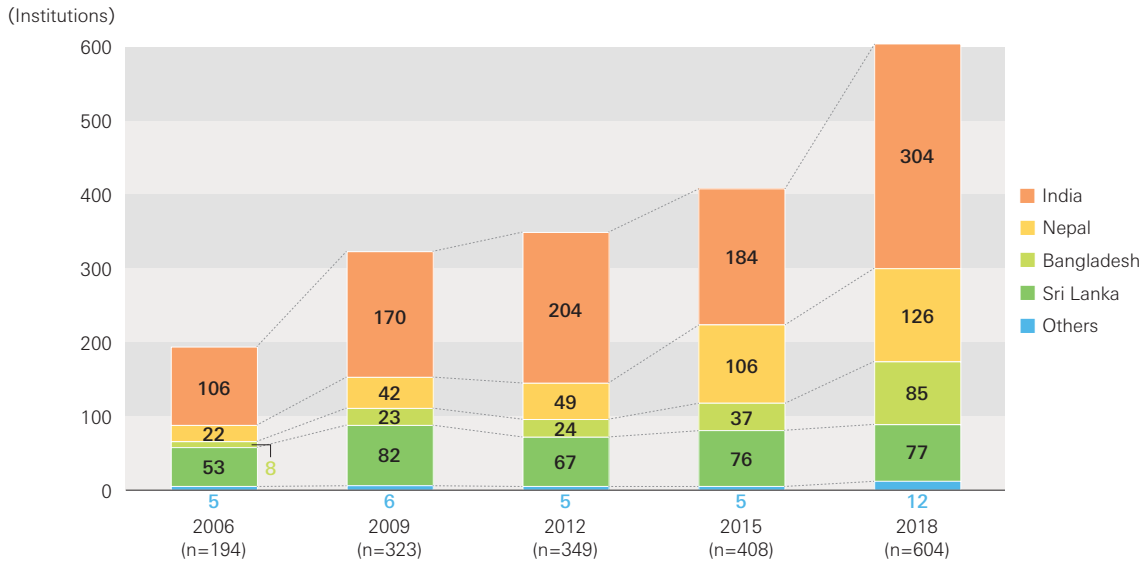
Regarding the number of learners in the South Asia region, looking at the percentage by educational stage, primary education is 14.8%, secondary education is 21.6%, higher education is 16.1%, and non-school education is 47.4%.

Table 2-3-1 Number of institutions, number of teachers, and number of learners in South Asia

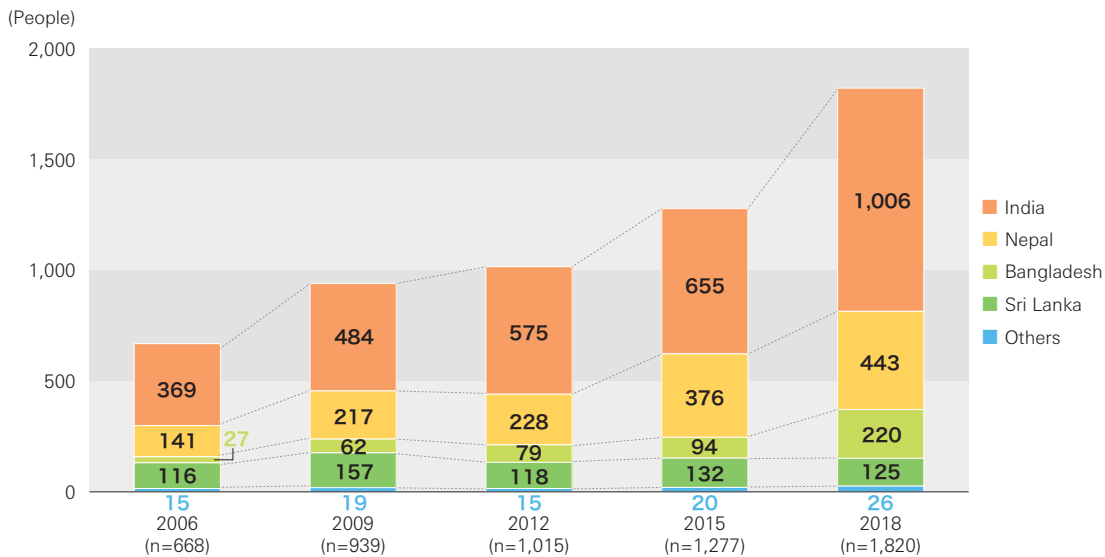
| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|---------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| India | 184 | 655 | 24,011 | 304 | 1,006 | 38,100 | 3.1 | 7,983 | 5,526 | 7,553 | 17,038 | 1,210,854,977 |
| Sri Lanka | 76 | 132 | 10,120 | 77 | 125 | 8,454 | 41.5 | 517 | 6,768 | 584 | 585 | 20,359,439 |
| Nepal | 106 | 376 | 4,262 | 126 | 443 | 5,326 | 20.1 | 0 | 0 | 200 | 5,126 | 26,494,504 |
| Bangladesh | 37 | 94 | 2,158 | 85 | 220 | 4,801 | 3.3 | 0 | 100 | 648 | 4,053 | 144,043,697 |
| Pakistan | 3 | 13 | 84 | 8 | 16 | 587 | 0.3 | 0 | 5 | 244 | 338 | 207,774,520 |
| Bhutan | 1 | 4 | 30 | 2 | 8 | 48 | 6.6 | 0 | 0 | 0 | 48 | 727,145 |
| Maldives | 1 | 3 | 130 | 2 | 2 | 40 | 9.9 | 0 | 0 | 20 | 20 | 402,071 |
| South Asia overall | 408 | 1,277 | 40,795 | 604 | 1,820 | 57,356 | 3.6 | 8,500 | 12,399 | 9,249 | 27,208 | 1,610,656,353 |

Source: *Population and Vital Statistics Report 2019*, by United Nations

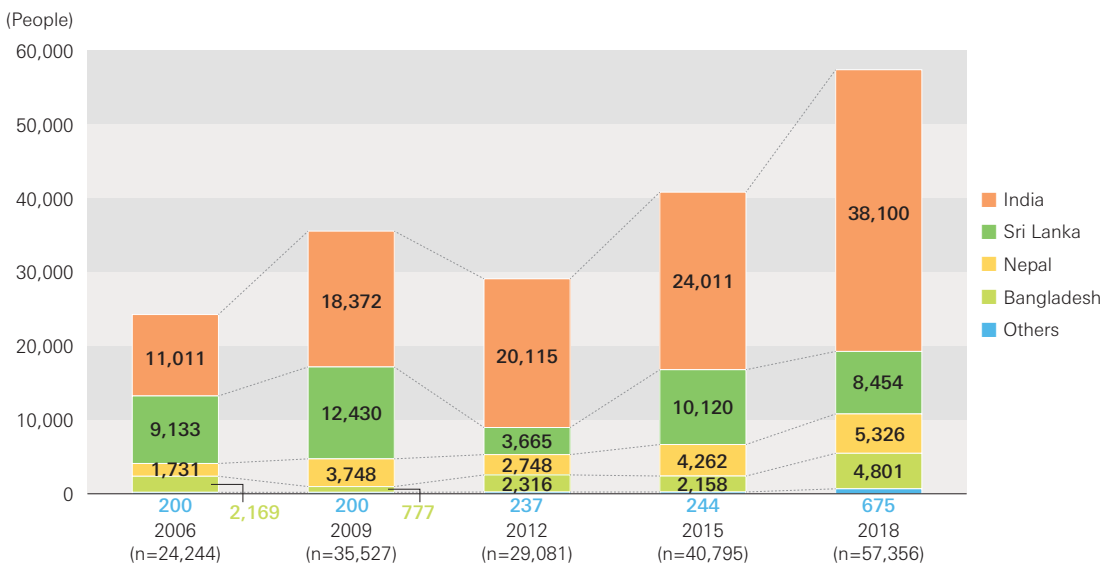
Graph 2-3-1 Number of Institutions in South Asia



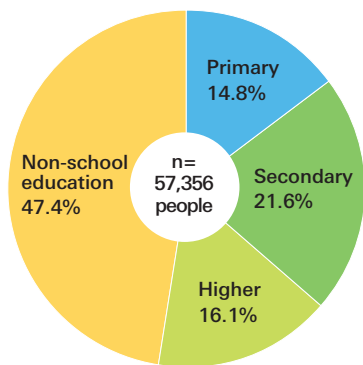
Graph 2-3-2 Number of Teachers in South Asia



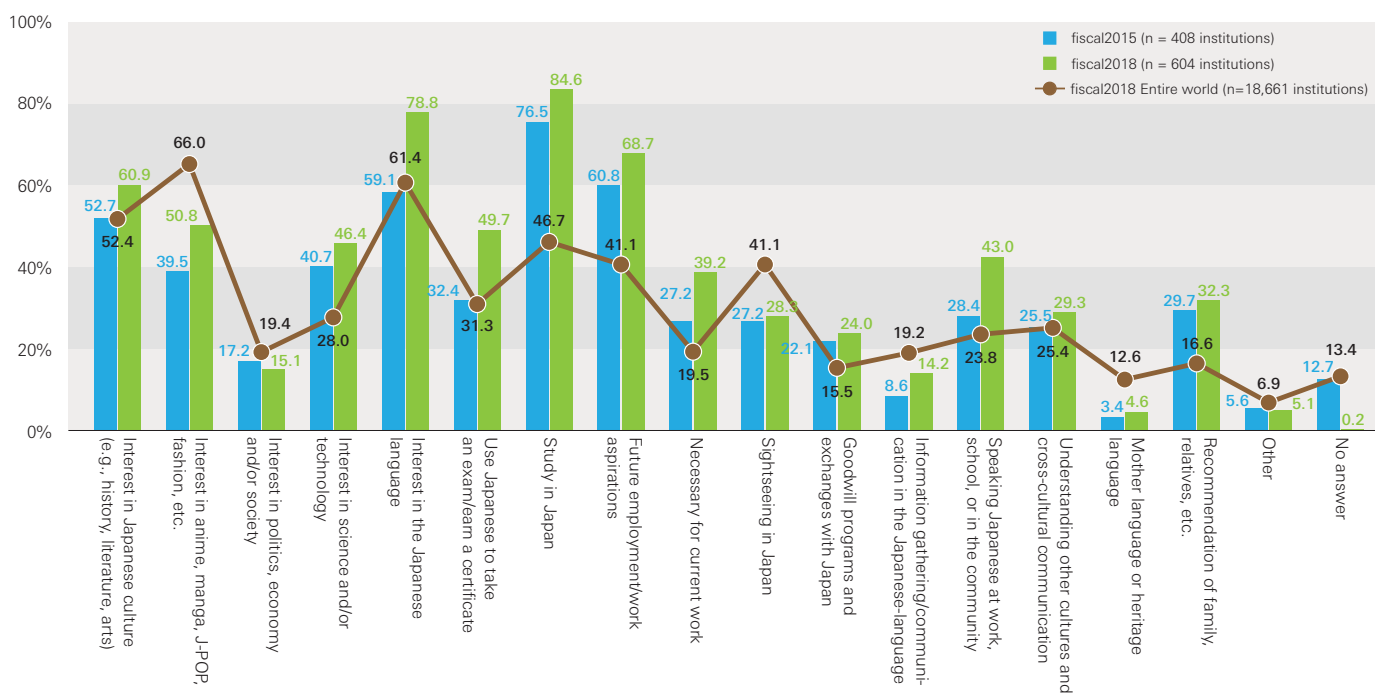
Graph 2-3-3 Number of Learners in South Asia



Graph 2-3-4 Percentages of learners by educational stage in South Asia



Graph 2-3-5 Objectives of Japanese-language learning in South Asia



Trends in major countries

[India]

In India, the number of institutions was up 65.2%, the number of teachers was up 53.6%, and the number of learners was up 58.7% compared to the previous survey, so all of the items recorded a large increase. In the context of the increasingly close economic relations between Japan and India, including the declaration in the Joint Statement of the Japan-India Summit Meeting held in September 2017 regarding “establishing Japanese-language certificate courses at 100 higher educational institutions in India as well as training 1,000 Japanese-language teachers, over the next five years,” opportunities for employment in Japanese companies are increasing and as result the demand for Japanese-language learning is growing.

Looking at the results for the number of learners by educational stage, primary education has actually recorded a large increase of nearly six times compared to the previous survey, and it is thought that the factors behind this are that classes in the Japanese language in India are often introduced at the discretion of the principals, and introduction has been seen at large-scale schools with large numbers of children.

Regarding secondary education, since the Central Board of Secondary Education (hereinafter referred to as “CBSE”), which is one of the organizations that implements secondary education completion exams combined with university entrance exams and has approximately 20,000 member schools inside India, added the Japanese language to the exam subjects in 2006, the expansion of Japanese-language education has continued in each survey, but in this survey it only increased slightly.

Regarding higher education, the number of institutions, the number of teachers, and the number of learners all increased, and it is thought that the background to this

is the local entry of Japanese companies boosted by good Japan-India economic relations, and the increasing interest in and popularity of the Japanese language as a skill that leads to getting a job due to intensifying recruitment of Indian students. Due to the shortage of IT human resources in Japan, the number of universities with engineer training courses that are offering classes in the Japanese language in collaboration with local private-sector language schools and Japanese human resources dispatch companies, etc., is increasing, primarily in southern India.

In the present survey, there has been a similar large increase in learners in the category of non-school education as well. It is thought that this also is caused by an increase in learners with the objective of working at Japanese companies, but Japanese-language training in Indian companies engaged in business with Japan, not only in Japanese companies, is thriving in Bengaluru and Chennai in southern India, and classes in the Japanese-language are being implemented in the form of dispatching teachers from local private-sector Japanese-language schools.

[Other countries and regions]

In addition, regarding South Asia, in Sri Lanka where Japanese-language learning is on a large scale within the region, the number of learners is down 16.5%. It is thought that the decrease in secondary education, which accounts for the majority of the number of learners in this country, had an effect, but the orientation of the learners has dispersed to other languages, particularly Chinese and Korean, and Japanese-language learners have decreased relatively. In addition, in Nepal the number of learners increased 25.0% and in Bangladesh it increased 122.5%.

4. Oceania

Australia and New Zealand, which account for the majority of learners in the region, both increased

Status of Japanese-language education in Oceania

The number of institutions in Oceania is 2,108 (up 7.3%), the number of teachers is 3,663 people (up 11.8%), and the number of learners is 443,2015 people (up 13.0%), so all of these figures have increased since the fiscal 2015 survey.

The country with by far the largest number of institutions is Australia, with 1,764; followed by New Zealand, with 275. The trend is the same for the number of teachers and the number of learners. Australia has 3,135 teachers and 405,175 learners, and New Zealand has 421 teachers and 32,764 learners. The composition ratio of the number of learners in Oceania is Australia, 91.4% and New Zealand, 7.4%, a total of 98.8% for these 2 countries combined.

Looking at the increases and decreases for each country and region, regarding the number of institutions, there was

an increase in 7 countries and regions, no change from the previous survey in 4 countries, and a decrease in 3 countries and regions. Regarding the number of teachers, there was an increase in 8 countries and regions, no change from the previous survey in 3 countries, and a decrease in 3 countries and regions. Regarding the number of learners, there was an increase in 7 countries and regions, no change from the previous survey in 1 country, and a decrease in 6 countries and regions. Note that in this survey we were not able to confirm any Japanese-language educational institutions in Fiji.

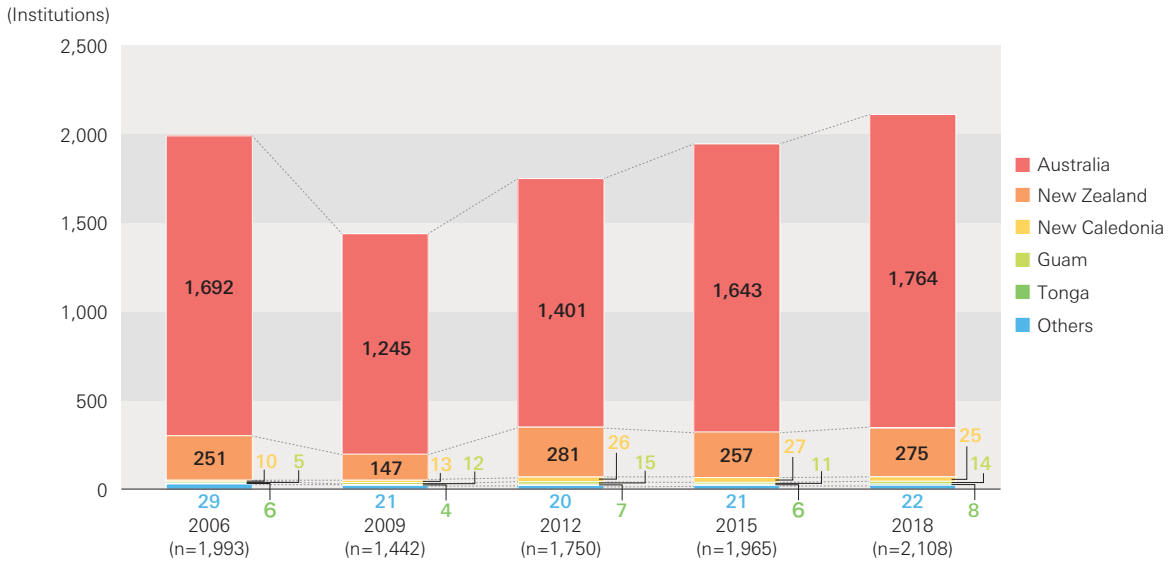
Regarding the number of learners in the Oceania region, looking at the percentage by educational stage, primary education is 60.9% and secondary education is 35.0%, so these 2 categories account for most of the learners.

Table 2-4-1 Number of institutions, number of teachers, and number of learners in Oceania

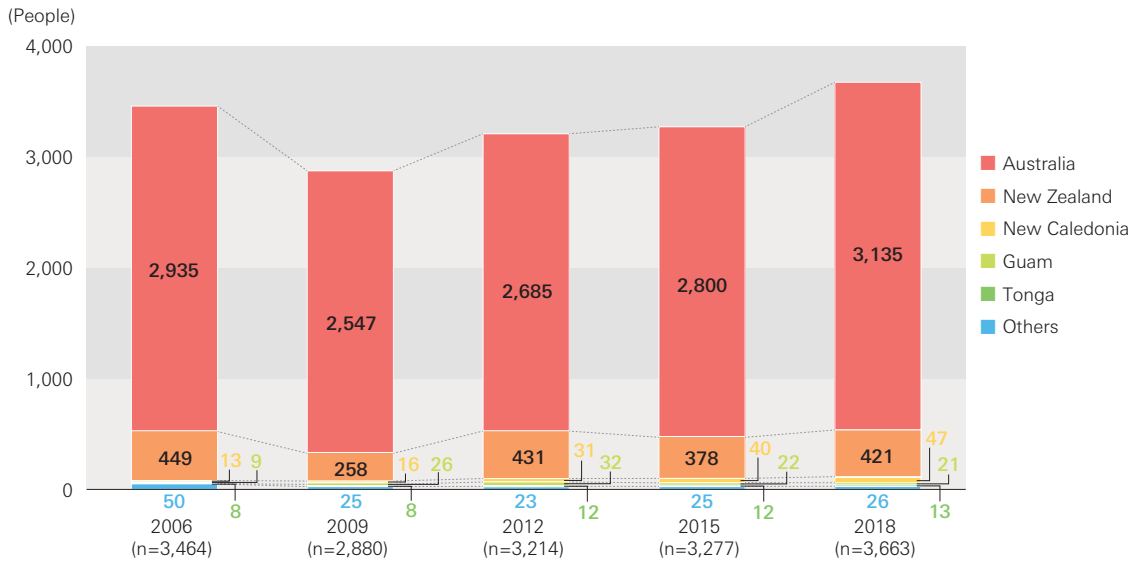
| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|--------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| Australia | 1,643 | 2,800 | 357,348 | 1,764 | 3,135 | 405,175 | 1,708.3 | 258,794 | 131,223 | 11,353 | 3,805 | 23,717,421 |
| New Zealand | 257 | 378 | 29,925 | 275 | 421 | 32,764 | 752.6 | 11,270 | 19,592 | 1,853 | 49 | 4,353,198 |
| New Caledonia | 27 | 40 | 2,026 | 25 | 47 | 2,159 | 803.3 | 0 | 2,039 | 120 | 0 | 268,767 |
| Guam | 11 | 22 | 1,547 | 14 | 21 | 1,505 | 944.4 | 52 | 1,208 | 245 | 0 | 159,358 |
| Northern Mariana Islands | 3 | 3 | 345 | 4 | 4 | 540 | 1,002.2 | 0 | 500 | 40 | 0 | 53,883 |
| Micronesia | 5 | 6 | 281 | 5 | 6 | 243 | 236.3 | 0 | 122 | 30 | 91 | 102,843 |
| Marshall | 4 | 4 | 324 | 4 | 4 | 242 | 455.2 | 0 | 186 | 56 | 0 | 53,158 |
| Tonga | 6 | 12 | 153 | 8 | 13 | 219 | 218.4 | 0 | 205 | 3 | 11 | 100,266 |
| French Polynesia | 1 | 1 | 58 | 3 | 2 | 134 | 47.6 | 0 | 80 | 0 | 54 | 281,674 |
| Papua New Guinea | 1 | 1 | 30 | 2 | 3 | 79 | 1.1 | 0 | 54 | 25 | 0 | 7,275,324 |
| Palau | 3 | 3 | 214 | 2 | 2 | 77 | 436.0 | 0 | 42 | 35 | 0 | 17,661 |
| Kiribati | 1 | 3 | 45 | 1 | 3 | 45 | 40.9 | 0 | 0 | 0 | 45 | 110,136 |
| Samoa | 1 | 1 | 44 | 1 | 2 | 33 | 16.8 | 0 | 0 | 30 | 3 | 195,979 |
| Fiji | 2 | 3 | 8 | - | - | - | - | - | - | - | - | - |
| Oceania overall | 1,965 | 3,277 | 392,348 | 2,108 | 3,663 | 443,215 | 1,208.0 | 270,116 | 155,251 | 13,790 | 4,058 | 36,689,668 |

Source: *Population and Vital Statistics Report 2019*, by United Nations

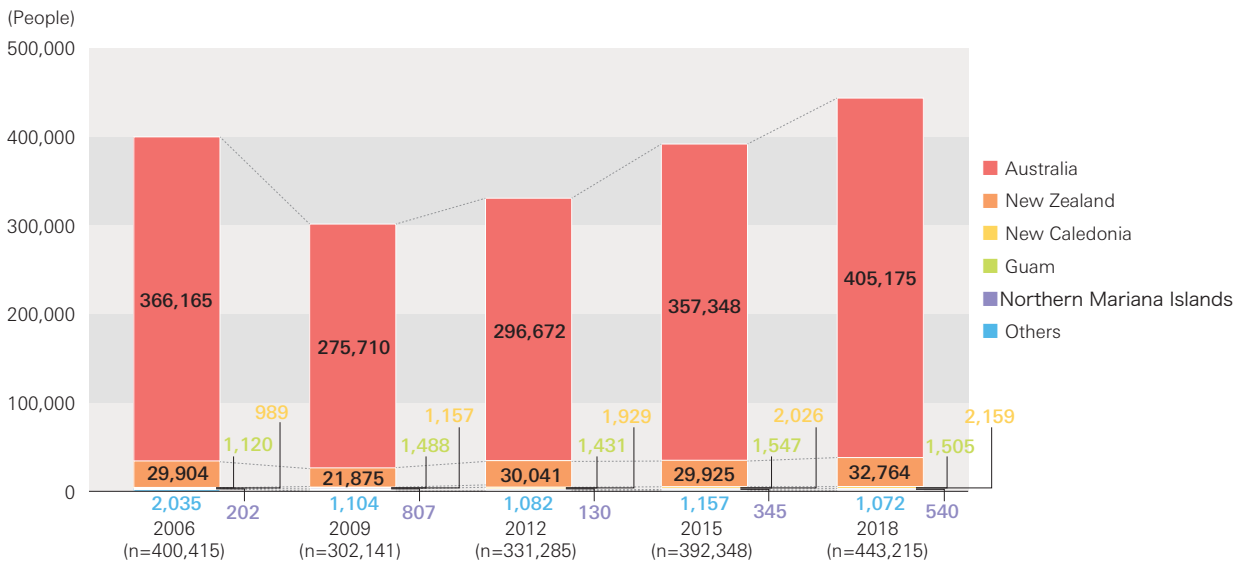
Graph 2-4-1 Number of Institutions in Oceania



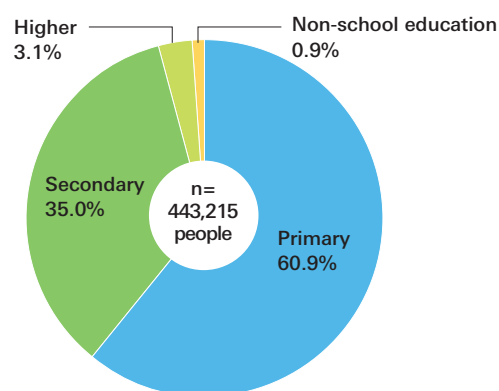
Graph 2-4-2 Number of Teachers in Oceania



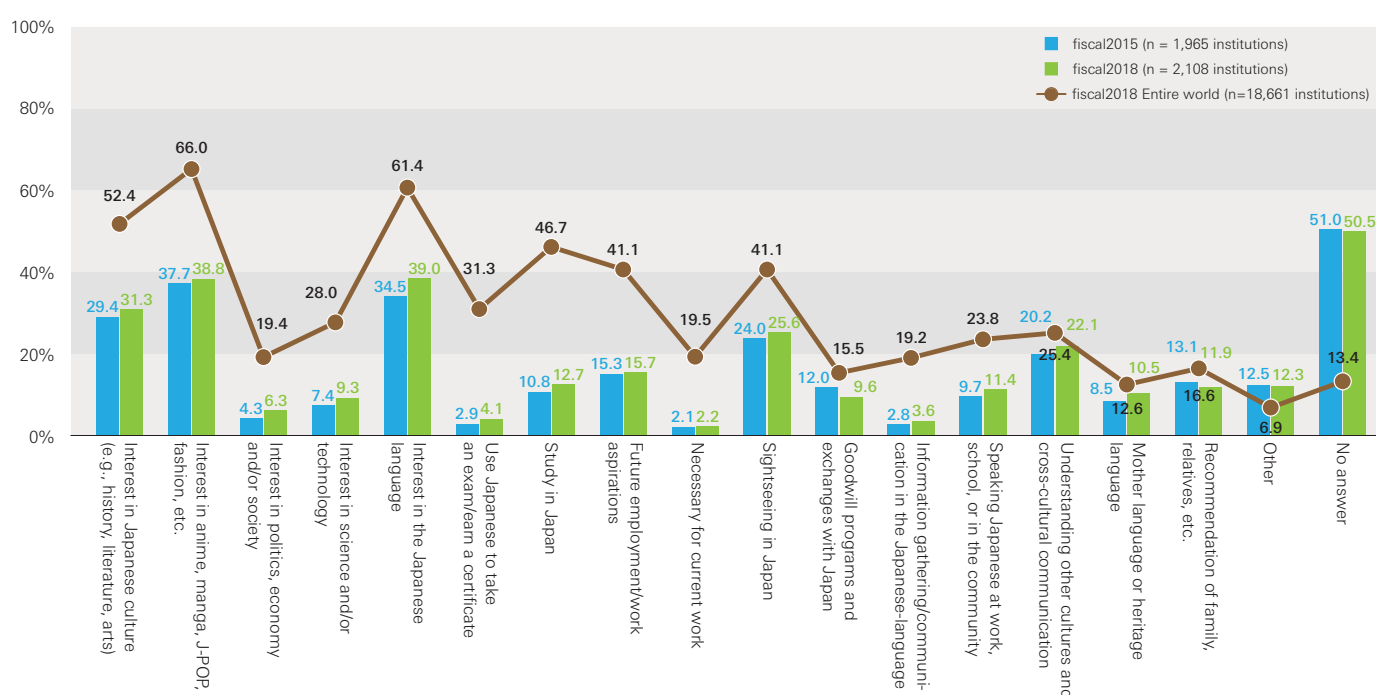
Graph 2-4-3 Number of Learners in Oceania



Graph 2-4-4 Percentages of learners by educational stage in Oceania



Graph 2-4-5 Objectives of Japanese-language learning in Oceania



Trends in each country and region

[Australia]

In Australia, the country that provides the most Japanese-language education in Oceania, the number of institutions, the number of teachers, and the number of learners have all increased. Looking at the results by educational stage, in primary education all of the items have increased, and in particular the number of learners increased by 24% and the number of people has increased by nearly 50,000 people compared to the previous survey. A policy aimed at making foreign-languages compulsory was announced in the Australia Curriculum (2011), and the curricula of each state are being revised in stages based on this. In several states the number of children and pupils receiving foreign-language education, including the Japanese language,

has recorded large increases against the background of that language education policy. Furthermore, the fact that there are advantages including the high level of interest in all aspects of Japanese culture, the many opportunities for mutual exchanges between Japan and Australia at the private-sector level, such as for travel, business, etc., and the existence of robust teacher networks in each state, has been a favorable factor for the Japanese-language to receive the benefits of the increase in the number of learners as a consequence of this policy change. Australia actually accounts for nearly 80% of the learners in primary education worldwide, and that percentage has risen since the previous survey. Note that a similar policy has not been executed in all of the states, and in New South Wales state,

where language education is not compulsory in primary education, the number of learners in primary education has decreased.

Regarding secondary education, the result is that both the number of institutions and the number of learners have decreased. The decrease in secondary education learners that does not depend on the change in the policy level is the first such decrease since commencement of the survey. In addition to cases in which the Japanese language was cancelled due to the introduction of other languages (in particular Chinese), there were also cases in which language subjects themselves, not just the Japanese language, were switched to STEM subjects (science, technology, engineering, and mathematics).

Furthermore, although its scale is small compared to primary education and secondary education, in the present survey the number of learners in higher education recorded a large increase. In response to the fact that interest in learning the Japanese language continues to be high among the young generation and policies encouraging science students to also take foreign-language subjects continue in many institutions, the number of learners has increased in almost all of the states. The impact due to the increase throughout Australia in foreign students from Asian countries, in particular students whose mother tongue is Chinese, is particularly marked, and they account for the majority of the students taking courses in some universities.

In the category of non-school education there is a tiny percentage of learners compared to the number of learners in the country overall, but the number of institutions, the number of teachers, and the number of learners have all increased 10% to 20%.

[New Zealand]

In New Zealand, the next largest country in scale of Japanese-language education after Australia, the number of institutions, the number of teachers, and the number of learners all increased in the country overall. Primary education and secondary education account for more than 90% of the number of learners in Japanese-language education in New Zealand. In primary education the number of institutions, the number of teachers, and the number of learners all increased compared to the previous survey, and in secondary education all of the items were largely unchanged. A topic in these educational stages is that in 2014 the government launched the Asian Language Learning in Schools (ALLiS) program and announced a policy of encouraging the learning of Japanese, Chinese, and Korean in primary education and secondary education. However, no new recruitment has been carried out since 2017, and subsidies for schools selected immediately after commencement of the program ended in fiscal2018, so there are concerns about its impact going forward.

In higher education the number of institutions and the number of learners increased compared to the previous survey. The number of learners in higher education reached a peak in the 1990s and the beginning of the 2000s but since then it has been in a period of stagnation. However, this is the greatest number of learners in higher education in the last 10 years of the survey. In 2014 the university network organization JSANZ (Japanese Studies Aotearoa New Zealand) was formed with the objective of promoting and enhancing Japanese-language education and research into Japanese culture in universities, and the fact that a wide range of activities has been continuously developed by the participating universities, including the publication of written works, the holding of symposiums, and the implementation of university student speech contests, etc., is bearing fruit. The percentage accounted for by the category of non-school education is tiny as in Australia, but we have been able to confirm the launch of new institutions since the previous survey.

5. North America

The number of institutions and the number of learners have decreased since the previous survey in both the United States and Canada, but the situation differs greatly depending on the region and state

Status of Japanese-language education in North America

In North America the number of institutions is 1,607 institutions (down 2.0%), the number of teachers is 4,683 people (up 1.3%), and the number of learners is 186,394 people (down 2.2%), so the increases and decreases since the fiscal 2015 survey have not been large for any of the items. The number of institutions and the number of learners decreased in both countries, and the number of teachers decreased in Canada while on the other hand it increased in the United States. The ratio of the number of learners by educational stage is primary education, 9.5%;

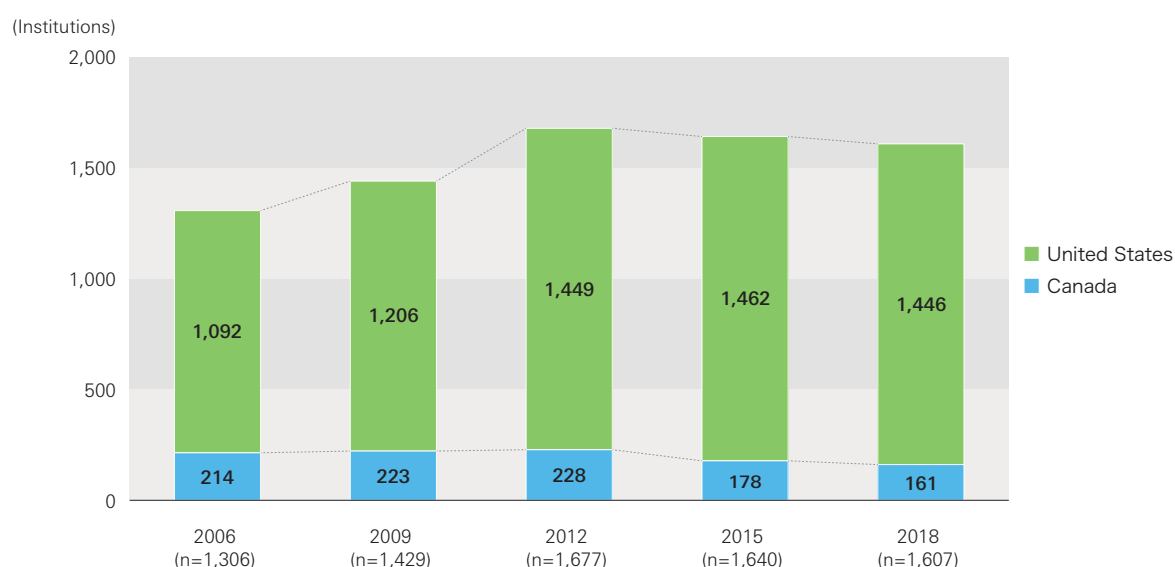
secondary education, 40.1%; higher education, 41.9%; and non-school education, 8.5%, so there was mostly no change to the major trends. Note that the United States accounts for 90% of the number of institutions, 85.9% of the number of teachers, and 89.5% of the number of learners, but looking at the number of learners per head of population, there is not much difference between the two countries. In both countries the educational systems and social conditions differ greatly depending on the state or province, and there are large differences in the distribution of learners and institutions depending on the region as well.

Table 2-5-1 Number of institutions, number of teachers, and number of learners in North America

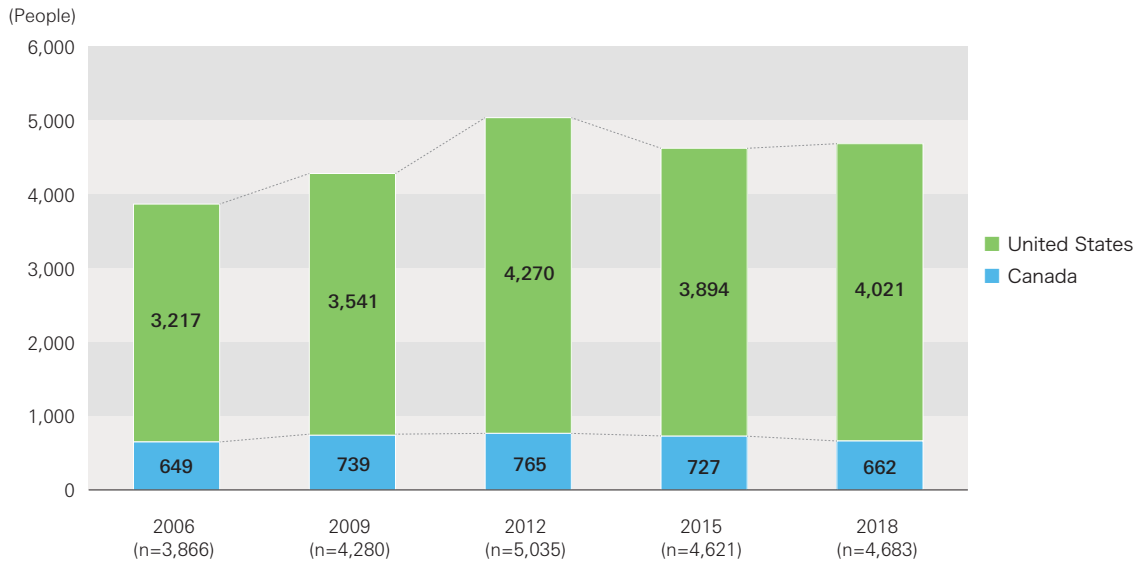
| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|------------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| United States | 1,462 | 3,894 | 170,998 | 1,446 | 4,021 | 166,905 | 54.1 | 17,609 | 70,455 | 68,237 | 10,604 | 308,745,538 |
| Canada | 178 | 727 | 19,601 | 161 | 662 | 19,489 | 55.4 | 90 | 4,375 | 9,774 | 5,250 | 35,151,730 |
| North America overall | 1,640 | 4,621 | 190,599 | 1,607 | 4,683 | 186,394 | 54.2 | 17,699 | 74,830 | 78,011 | 15,854 | 343,897,268 |

Source: *Population and Vital Statistics Report 2019*, by United Nations

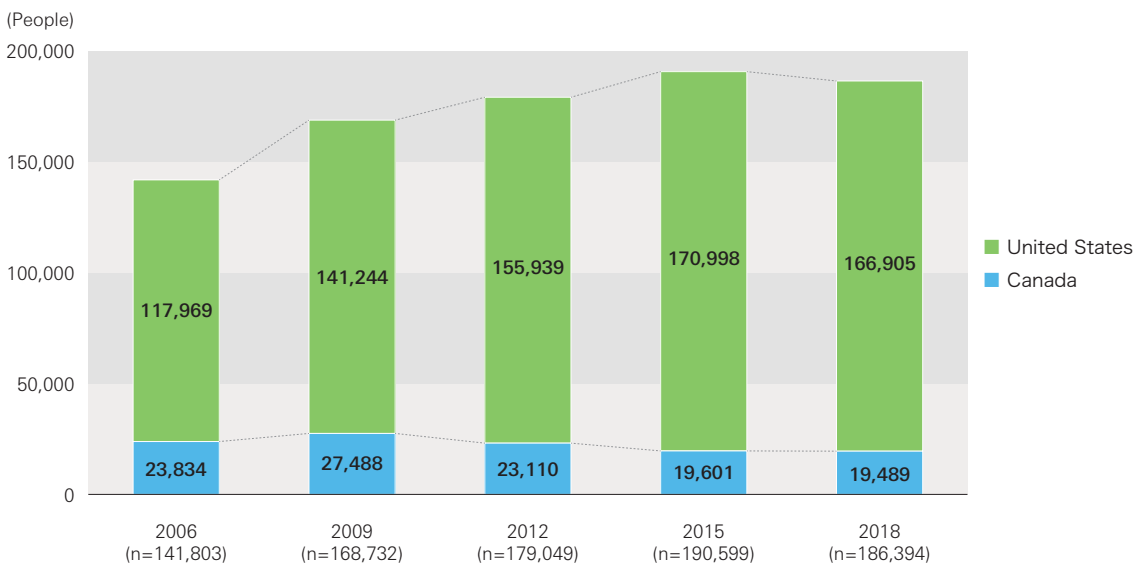
Graph 2-5-1 Number of Institutions in North America



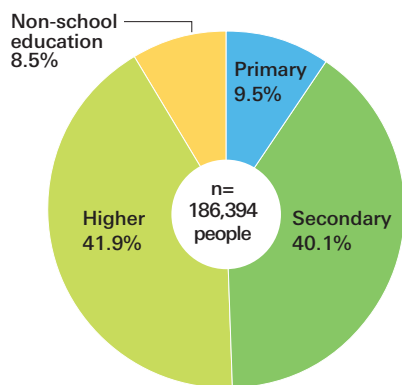
Graph 2-5-2 Number of Teachers in North America



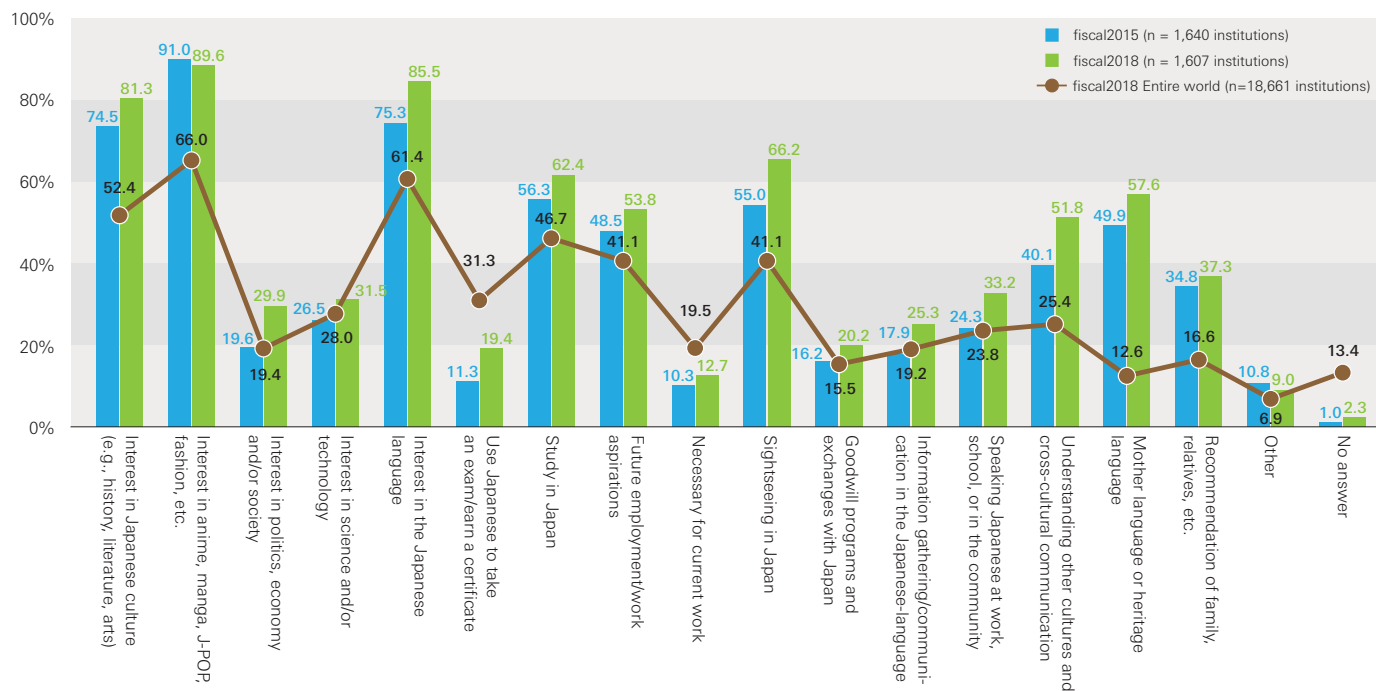
Graph 2-5-3 Number of Learners in North America



Graph 2-5-4 Percentages of learners by educational stage in North America



Graph 2-5-5 Objectives of Japanese-language learning in North America



Trends in each country

[United States]

The United States reversed its results in the fiscal2015 survey, that “the number of institutions and the number of learners have increased, while on the other hand the number of teachers began to decrease,” to produce the results in the present survey that the “number of institutions and learners decreased but the number of teachers increased.” A decrease in the number of learners was seen in the primary education and secondary educational stages, but in the K-12 levels, which constitute the compulsory education curriculum, the trend toward reduced foreign-language education budgets at the state level is continuing, and it is thought that the fact that moves to close or shrink Japanese-language programs in each region are being seen has led to the slight decline in the number of learners in the country overall. On the other hand, the number of teachers has increased since the previous survey, but there are many cases in which full-time posts have been eliminated and multiple part-time instructors have been employed instead, and due to this the number of teachers appears to have increased, but we can conclude that this is actually a result that reflects the tight budgets for education. Note regarding this that there are also reports that the abolition and shrinking of Japanese-language programs has been stopped to some extent due to the Japan Foundation’s salary subsidies, etc.

On the other hand, the number of learners in higher education increased again, as in the fiscal2015 survey. The background to this result is that it is thought that there are many cases in which learners who studied the Japanese language at the primary and secondary educational levels are continuing learning even after they enroll at university, and that foreign students from the East Asian region, such as China and the Republic of Korea, etc., who often take the Japanese language as their foreign-language subject at university, are increasing. Note that according to the statistics of the Modern Language Association of America, the overall number of students taking foreign-language courses at universities in the United States decreased between 2013 and 2016, but in that context only Japanese and Korean increased, and the results of this survey also match that result.

Japanese-language education in the United States is mainly school education and the category of non-school education, including private-sector language schools, etc., accounts for only a small percentage of it. However, in the present survey, the number of institutions, the number of teachers, and the number of learners all increased in this category.

Regarding the increases and decreases in the number of learners by state, California, which has the greatest number of learners, second-placed Hawaii, and fourth-placed New York State all decreased, but third-ranked

Washington state and fifth-ranked Texas increased. Looking at the results for the United States overall, 23 states increased and 27 states decreased. Looking at the learning objectives and reasons, in the present survey as well the highest percentage was for “interest in anime, manga, J-POP, fashion, etc.,” just as in the previous survey. Furthermore, objectives and reasons did not stop with the field of pop culture, as “interest in history, literature, arts, etc.” also accounted for a high percentage.

[Canada]

In Canada the results were that the number of institutions and the number of teachers decreased and the number of learners declined slightly. In primary education, all of the items decreased. Furthermore, in secondary education all of the items continued to decrease just as in the last few surveys, and the fact that this trend was particularly marked in the province of British Columbia, which has the greatest number of learners in the country, had an effect. Cases of courses being stopped when the teachers retired and cases of classes at different levels being integrated have been reported, and the trend of Japanese-language courses in primary and secondary education decreasing has continued in the same way as previously. Note that in this province the New Democratic Party took power in 2017, ending 16 years of rule by the Liberal Party which had promoted budget reductions in public education, so there is a possibility that the situation will be improved going forward.

On the other hand, in higher education, which has the greatest number of learners in all of the educational stages,

and non-school education, which has the greatest number of teachers, the number of learners has increased since the previous survey. In higher education, the reforms of the structure of Japanese-language departments, including the expansion of instructor posts, that have been carried out in several universities primarily in the province of British Columbia have borne fruit, so the number of learners in the country overall has increased by 17.1%. In the last few surveys, learners in secondary education have decreased while on the other hand the number of learners in higher education is increasing, and since the time of the fiscal2012 survey the latter has accounted for the highest percentage in all of the educational stages.

Furthermore, in this survey the number of institutions and the number of learners increased in non-school education as well. The number of comparatively young learners has increased, and Japanese-language educational institutions offering Japanese-language as a heritage language have increased.

Regarding the number of learners by province, the results were that 5 provinces including Ontario and Quebec, etc. increased, and 4 provinces including British Columbia and Alberta, etc. decreased, but in all provinces the increase or decrease was between a few dozen and a few hundred people, so the situation is that the total for the country overall is largely unchanged. Looking at the learning objectives and reasons, just as in the United States, the options concerning interest in all aspects of the culture of Japan, such as “interest in anime, manga, J-POP, fashion, etc.” and “interest in history, literature, arts, etc.” accounted for high percentages.

6. Central America

In Mexico, the country with the most Japanese-language education in the region, the number of learners recorded a large increase, and the number of learners is much higher than in the previous survey results for the region overall as well

Status of Japanese-language education in Central America

In Central America overall the number of institutions is 168 institutions (up 64.7%), the number of teachers is 642 people (up 51.4%), and the number of learners is 17,367 people (up 49.2%), so all of these items have recorded large increases compared to the fiscal2015 survey.

In all of the items, the percentage accounted for by Mexico is high. Regarding the number of institutions, Mexico accounts for 120 of 168, regarding the number of teachers it accounts for 483 people of 642 people, and regarding the number of learners it accounts for 13,673 people of 17,367 people.

Looking at the increases and decreases for each country, the number of institutions recorded a large increase of

76.5% in Mexico and increased or was largely unchanged in all of the countries except Nicaragua. The number of teachers increased except in Cuba and Jamaica. Furthermore, the number of learners increased in all of the countries except Honduras, and we have been able to confirm new Japanese-language educational institutions in Haiti, Puerto Rico, and Belize, countries for which we were not able to confirm Japanese-language educational institutions in the fiscal2015 survey.

Regarding the number of learners, looking at the percentage by educational stage, primary education is 6.9%, secondary education is 6.9%, higher education is 23.0%, and non-school education is 63.3%, so the category of non-school education accounts for the highest percentage and has increased by 17.4 percentage points compared to the fiscal2015 survey.

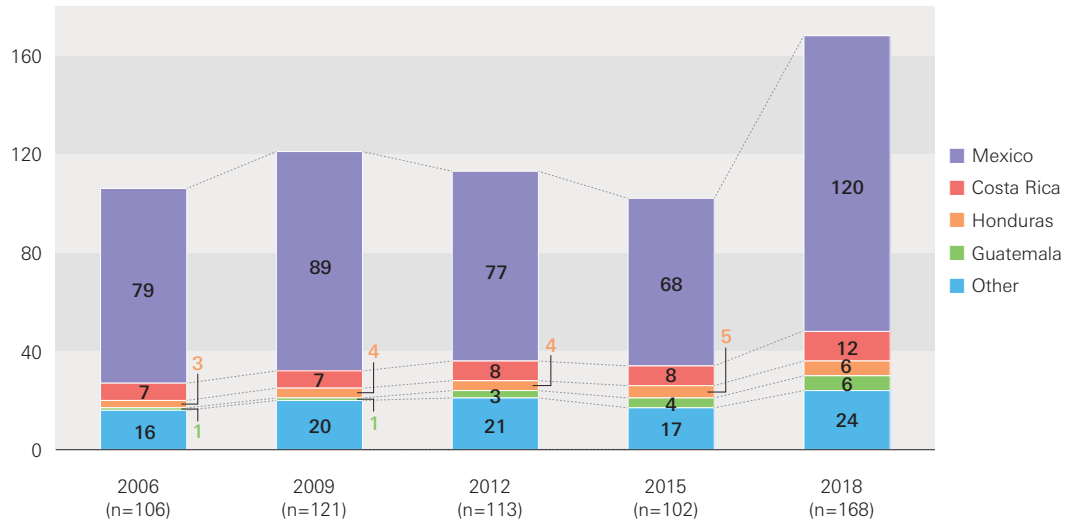
Table 2-6-1 Number of institutions, number of teachers, and number of learners in Central America

| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|------------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| Mexico | 68 | 322 | 9,240 | 120 | 483 | 13,673 | 12.2 | 1,081 | 1,115 | 3,307 | 8,170 | 112,336,538 |
| Costa Rica | 8 | 26 | 522 | 12 | 39 | 892 | 20.7 | 0 | 0 | 300 | 592 | 4,301,712 |
| Cuba | 3 | 12 | 243 | 4 | 10 | 574 | 5.1 | 0 | 0 | 22 | 552 | 11,167,325 |
| Honduras | 5 | 17 | 617 | 6 | 21 | 492 | 5.9 | 111 | 31 | 15 | 335 | 8,303,771 |
| El Salvador | 4 | 17 | 269 | 4 | 24 | 424 | 7.4 | 0 | 0 | 10 | 414 | 5,744,113 |
| Guatemala | 4 | 8 | 271 | 6 | 10 | 333 | 3.0 | 0 | 0 | 19 | 314 | 11,237,196 |
| Dominican Republic | 1 | 6 | 50 | 4 | 26 | 227 | 2.4 | 0 | 0 | 60 | 167 | 9,445,281 |
| Jamaica | 3 | 6 | 127 | 3 | 5 | 217 | 8.0 | 0 | 0 | 177 | 40 | 2,697,983 |
| Trinidad and Tobago | 1 | 2 | 82 | 1 | 3 | 170 | 12.8 | 0 | 0 | 0 | 170 | 1,332,901 |
| Panama | 3 | 4 | 107 | 3 | 6 | 132 | 3.9 | 0 | 37 | 30 | 65 | 3,405,813 |
| Nicaragua | 2 | 4 | 109 | 1 | 7 | 120 | 2.3 | 0 | 0 | 0 | 120 | 5,142,098 |
| Puerto Rico | - | - | - | 1 | 1 | 50 | 1.3 | 0 | 0 | 50 | 0 | 3,725,789 |
| Haiti | - | - | - | 1 | 4 | 36 | 0.4 | 0 | 0 | 0 | 36 | 8,373,750 |
| Belize | - | - | - | 2 | 3 | 27 | 8.4 | 0 | 15 | 0 | 12 | 322,453 |
| Central America total | 102 | 424 | 11,637 | 168 | 642 | 17,367 | 9.3 | 1,192 | 1,198 | 3,990 | 10,987 | 187,536,723 |

Source: *Population and Vital Statistics Report 2019*, by United Nations

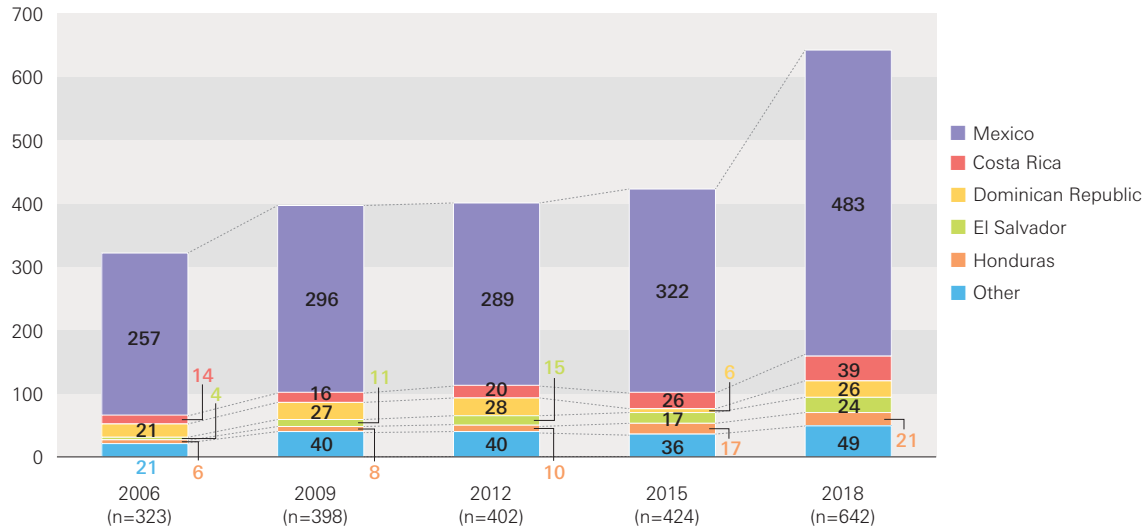
Graph 2-6-1 Number of Institutions in Central America

(Institutions)



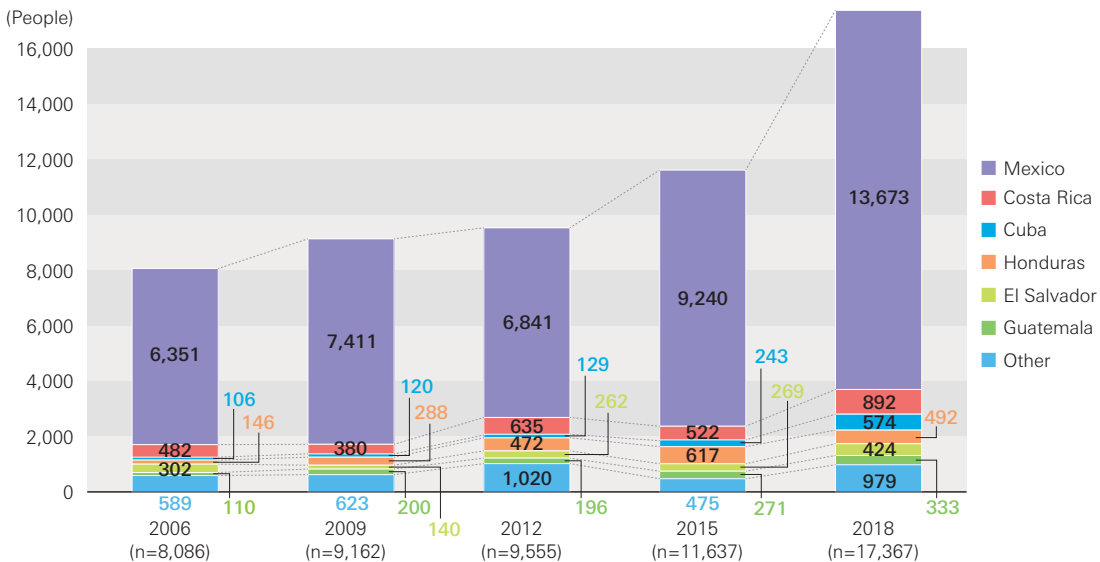
Graph 2-6-2 Number of Teachers in Central America

(People)

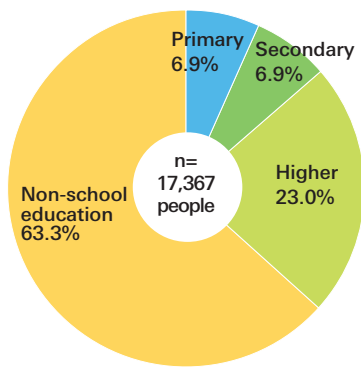


Graph 2-6-3 Number of Learners in Central America

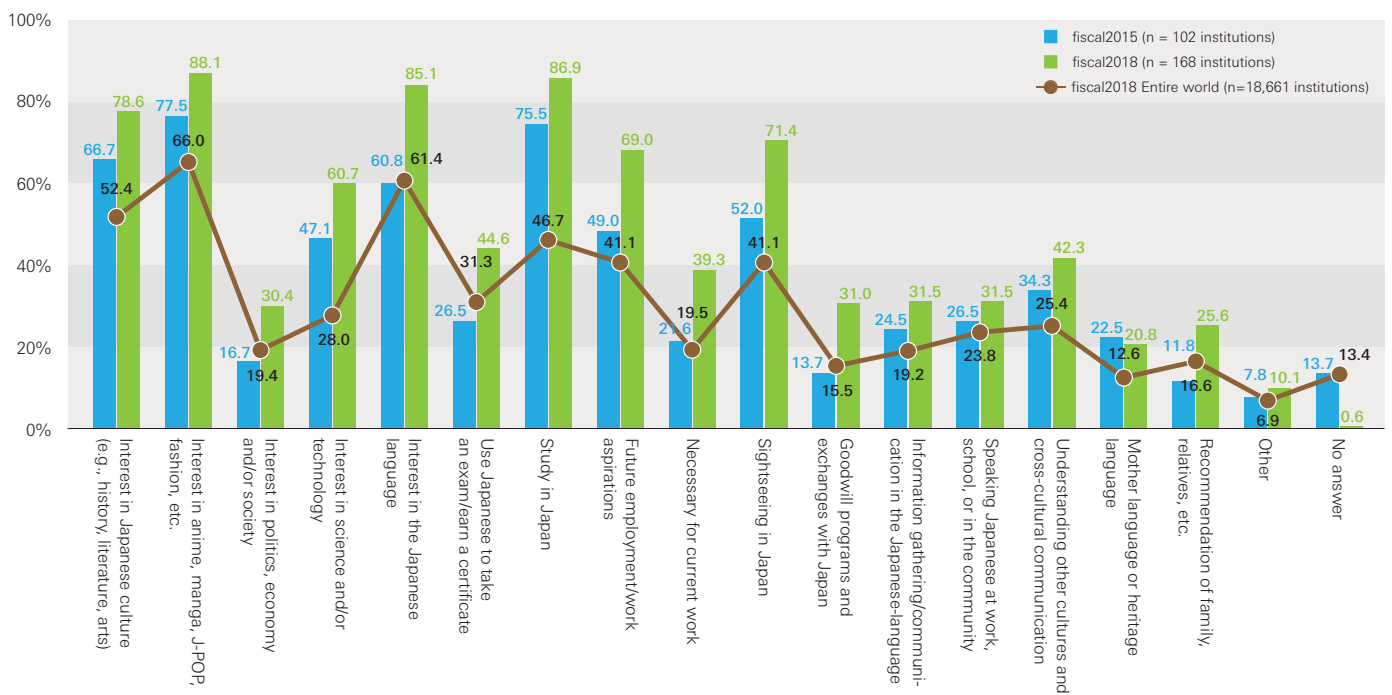
(People)



Graph 2-6-4 Percentages of learners by educational stage in Central America



Graph 2-6-5 Objectives of Japanese-language learning in Central America



Trends in each country and region

[Mexico]

In Mexico, the country where the scale of the Japanese-language education is largest in the Central America region, the number of institutions, the number of learners, and the number of teachers all recorded large increases compared to the previous survey, and in particular the number of learners in non-school education nearly doubled compared to the previous survey. It is thought that the factors behind this are that since about 2014 a succession of Japanese companies, primarily in the automobile-related manufacturing industries, have entered the Bajío region (the central highlands region of Mexico) and as a result interest in Japan has grown, and in addition opportunities for people to actually utilize the Japanese they have studied in their work are increasing. In the present survey, many new institutions were actually confirmed in the states that constitute this region (Guanajuato, Querétaro, Aguascalientes, and Jalisco). Furthermore, it can be determined from the data that the popularity of Japan's subcultures and pop culture is continuing to be high and that there are many motivated learners who want to study in Japan, so interest in Japanese-language education is rising, particularly among the comparatively young generations.

Therefore, the number of institutions and the number of teachers has also increased as a consequence of the popularity of Japanese-language education, but a situation has arisen in which the increase in the number of teachers

is not keeping pace with demand. That trend was also manifested in the survey results; for example, the number of institutions that replied that "there are not enough teachers for the number of learners" was more the double the worldwide average. Furthermore, there were very few cases in which people could make a living as a full-time Japanese-language instructor locally, and the present situation is that there are many part-time teachers who are working in a number of schools at the same time and also many teachers teaching the Japanese language on weekends while doing different work on weekdays.

[Other countries and regions]

Except for Mexico, the scale of Japanese-language education is comparatively small in most of the countries. In Costa Rica, the number of institutions, the number of teachers, and the number of learners all increased by more than 50%, and this country passed Honduras to become the country with the second largest scale of Japanese-language education in Central America. The number of learners recorded large increases in higher education and the category of non-school education while on the other hand the lack of teachers who can teach the Japanese language at an intermediate and senior level is an issue. Furthermore, in Cuba the number of learners increased primarily in the category of non-school education, so this country has risen to third in Central America.

7. South America

Increase in Brazil, which accounts for more than 60% of the number of learners in the region overall, and Argentina rises to second

Status of Japanese-language education in South America

The number of institutions in South America is 501 (up 4.2%), the number of teachers is 1,838 people (up 6.9%), and the number of learners is 42,226 people (up 10.7%), so the number of institutions, the number of teachers, and the number of learners have all increased since the fiscal2015 survey.

The number of institutions, in order from most to least, is Brazil (380), Argentina (46), Colombia (18), and Paraguay (12), and the number of teachers is in the order of Brazil (1,182 people), Argentina (206 people), Paraguay (146 people), and Colombia (91 people). On the other hand, looking at the number of learners, there is no change to the top two as Brazil has the greatest number of learners with 26,157 people followed by Argentina with 5,054 people, but next comes Peru with 3,792 people. We can infer that in Peru there are a comparatively large number of learners

relative to the number of institutions (10) and the number of teachers (72 people).

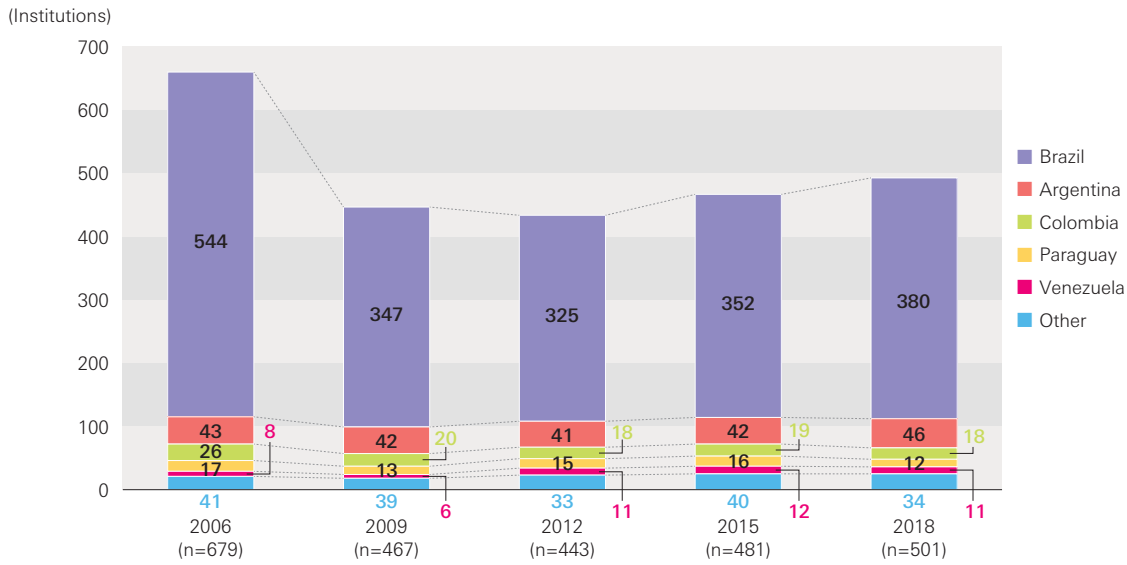
Looking at the increases and decreases for each country, the results were that the number of institutions has increased in 4 countries including Brazil and the number of teachers has increased except in Chile and Peru. The number of learners has increased except in Paraguay and Peru. Regarding the number of learners, looking at the percentage by educational stage, primary education is 15.2%, secondary education is 19.6%, higher education is 6.1%, and non-school education is 59.1%, so the trend is for the ratio accounted for by non-school education to be high, as in the fiscal2015 survey. In the present survey the learning objective of “mother language or heritage language” is much more prominent in the South America region than in the other regions, but in the last few surveys the items concerning interest in all aspects of Japanese culture and study in Japan have scored higher percentages.

Table 2-7-1 Number of institutions, number of teachers, and number of learners in South America

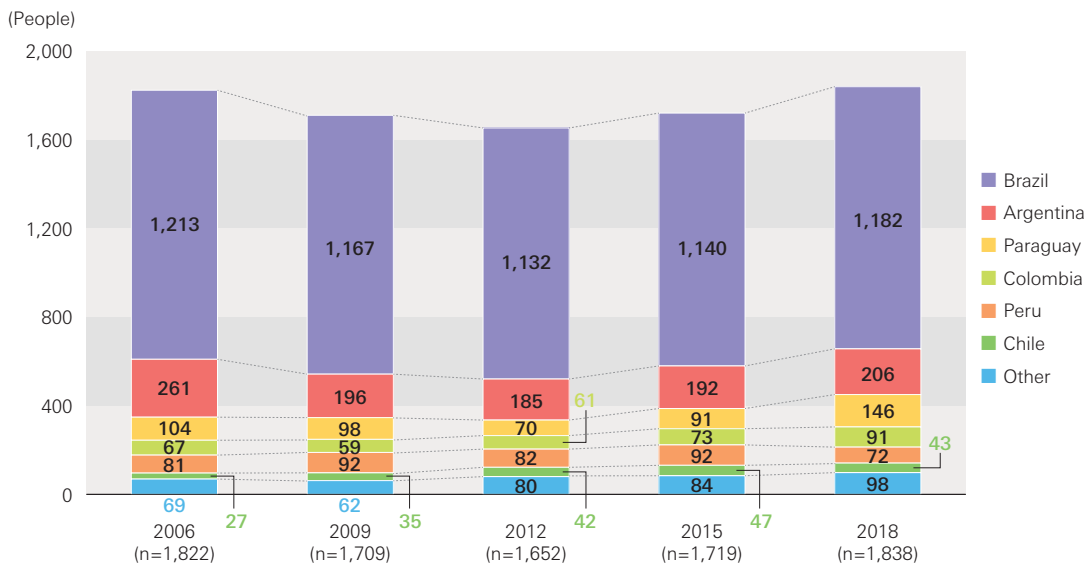
| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|----------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| Brazil | 352 | 1,140 | 22,993 | 380 | 1,182 | 26,157 | 13.7 | 2,666 | 5,825 | 1,499 | 16,167 | 190,755,799 |
| Argentina | 42 | 192 | 3,571 | 46 | 206 | 5,054 | 12.6 | 490 | 180 | 0 | 4,384 | 40,117,096 |
| Peru | 19 | 92 | 4,074 | 10 | 72 | 3,792 | 12.9 | 1,602 | 1,056 | 40 | 1,094 | 29,381,884 |
| Paraguay | 16 | 91 | 3,725 | 12 | 146 | 3,010 | 58.3 | 1,336 | 916 | 100 | 658 | 5,163,198 |
| Colombia | 19 | 73 | 1,502 | 18 | 91 | 1,645 | 4.0 | 47 | 126 | 547 | 925 | 41,468,384 |
| Chile | 8 | 47 | 1,078 | 10 | 43 | 1,205 | 8.0 | 0 | 100 | 238 | 867 | 15,116,435 |
| Bolivia | 6 | 36 | 489 | 6 | 40 | 557 | 5.5 | 272 | 66 | 0 | 219 | 10,059,856 |
| Venezuela | 12 | 35 | 399 | 11 | 35 | 443 | 1.6 | 4 | 0 | 25 | 414 | 27,227,930 |
| Uruguay | 3 | 7 | 244 | 4 | 12 | 251 | 7.6 | 0 | 0 | 100 | 151 | 3,286,314 |
| Ecuador | 4 | 6 | 77 | 4 | 11 | 112 | 0.8 | 0 | 0 | 30 | 82 | 14,483,499 |
| South America total | 481 | 1,719 | 38,152 | 501 | 1,838 | 42,226 | 11.2 | 6,417 | 8,269 | 2,579 | 24,961 | 377,060,395 |

Source: Population and Vital Statistics Report 2019, by United Nations

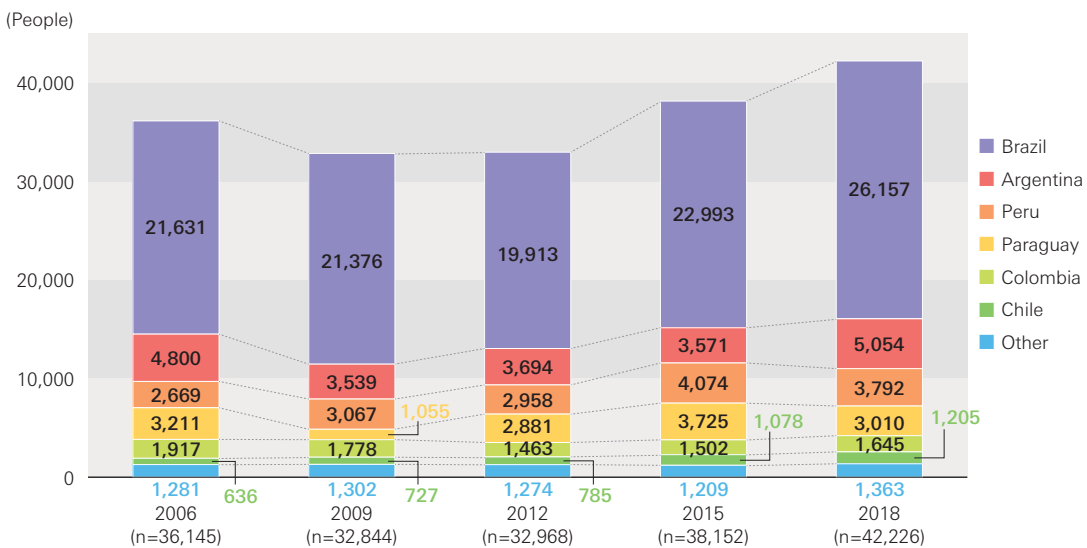
Graph 2-7-1 Number of Institutions in South America



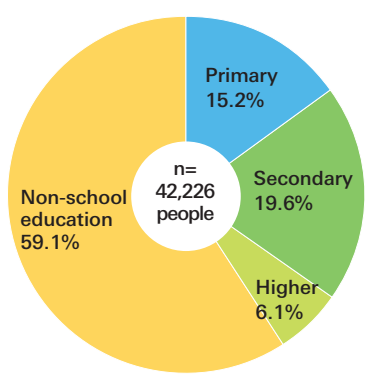
Graph 2-7-2 Number of Teachers in South America



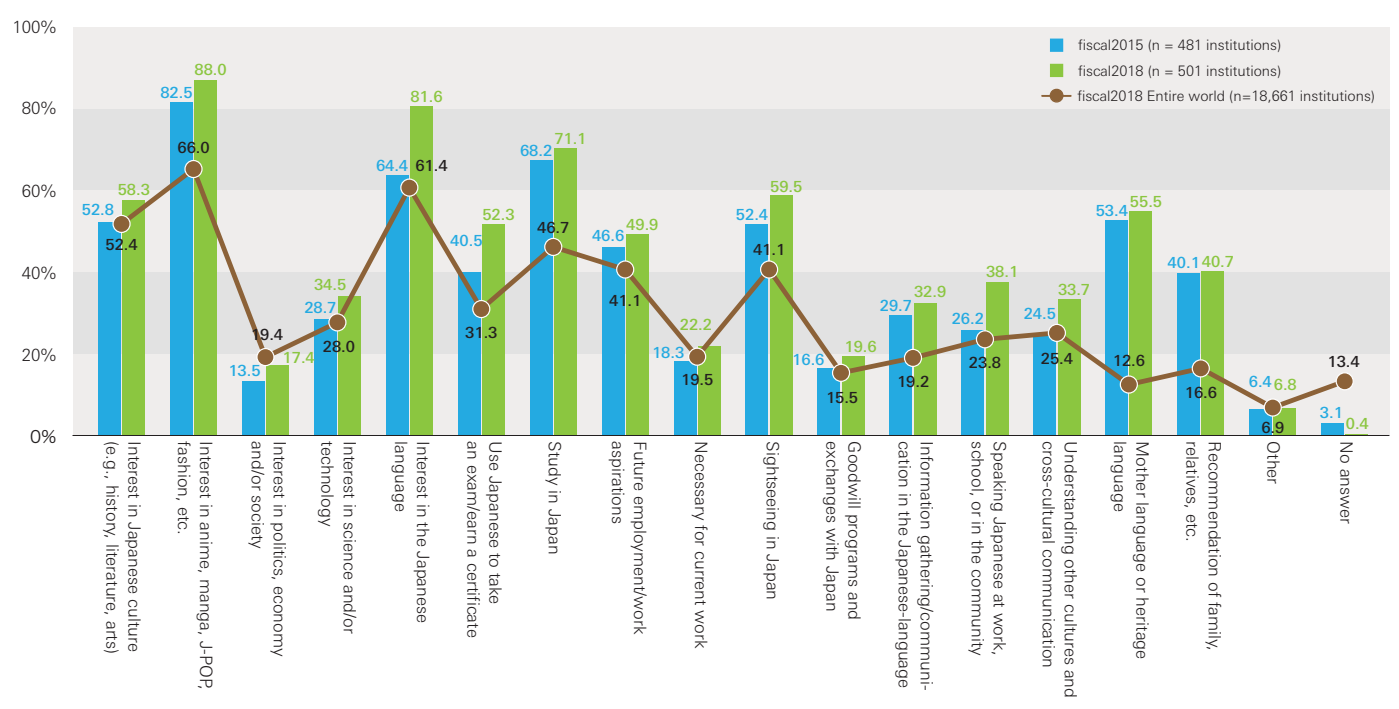
Graph 2-7-3 Number of Learners in South America



Graph 2-7-4 Percentages of learners by educational stage in South America



Graph 2-7-5 Objectives of Japanese-language learning in South America



Trends in each country

[Brazil]

As in past surveys, Brazil is the country with the most Japanese-language education in South America, and the number of institutions, the number of teachers, and the number of learners all increased slightly.

Looking at the results by educational stage, the rate of increase in the number of learners was highest in secondary education, and the building up of the increase in learners in individual institutions in each region, including the fact that a state bilingual school was newly established in the State of Amazonas and as a result learners increased by thousands of people, and the fact that Japanese-language learners increased in the State of Pernambuco contributed to the results for secondary education overall.

Furthermore, the number of institutions, the number of teachers, and the number of learners all increased in the category of non-school education, which accounts for more than 60% of the number of learners in Brazil. In states where learners in private-sector language schools increased and the number of learners increased, many cases of language schools that had not implemented Japanese-language education previously newly establishing classes have been seen.

Note that although its percentage in the country overall is not high, the number of institutions and the number of learners have increased in higher education as well. In particular, the number of learners recorded a large increase in the State of Amazonas, the State of São Paulo, and the State of Rio de Janeiro, and in the other states the number of people has been largely maintained from the fiscal2015 survey. Note that in the State of Amazonas a Japanese-language course was commenced in 2011 at the Federal

University of Amazonas (UFAM) and since then the number of learners has been increasing year by year. On the other hand, primary education was the only one of all of the educational stages in which the number of learners decreased, and the main reason for this is that a number of cases were seen of the implementation of classes in the Japanese-language being stopped in institutions where Japanese-language classes existed until the previous survey.

[Other countries and regions]

In Argentina, which in the present survey has the second largest scale of Japanese-language education in South America after Brazil, the number of institutions, the number of teachers, and the number of learners have all increased since the previous survey. In particular, the number of learners increased by more than 40% compared to the previous survey, and the increase in non-school education was the main factor behind this. In Peru, where there are many people of Japanese descent as in Brazil, the number of institutions, the number of teachers, and the learners all decreased. The size of the decrease was particularly large in the category of non-school education, and the problem areas are the many institutions indicating that there are not enough teachers and teaching materials to meet demand. This trend is particularly marked in regional cities other than the capital Lima. Additional results were that in Paraguay, which has a comparatively large number of learners, the number of learners decreased, and in Colombia the number of learners increased.

8. Western Europe

Learners increase in France, Germany, Spain, Italy, etc.

Status of Japanese-language education in Western Europe

In Western Europe the results are that the number of institutions is 1,123 institutions (down 0.4%), the number of teachers is 2,969 people (up 6.6%), and learners are 90,114 (up 7.8%), and the number of institutions and the number of learners set new all-time records. The countries with the greatest number of institutions are the United Kingdom (288), France (229), Germany (157), Spain (141), and Switzerland (72). Regarding the number of teachers, the order is France (763 people), the United Kingdom (646 people), and Germany (473 people); and the number of learners is the same order as the number of teachers: France (24,150 people), the United Kingdom (20,040 people), Germany (15,465 people), Spain (8,495 people), and Italy (7,831 people). The top-ranked countries are countries in which the populations themselves are

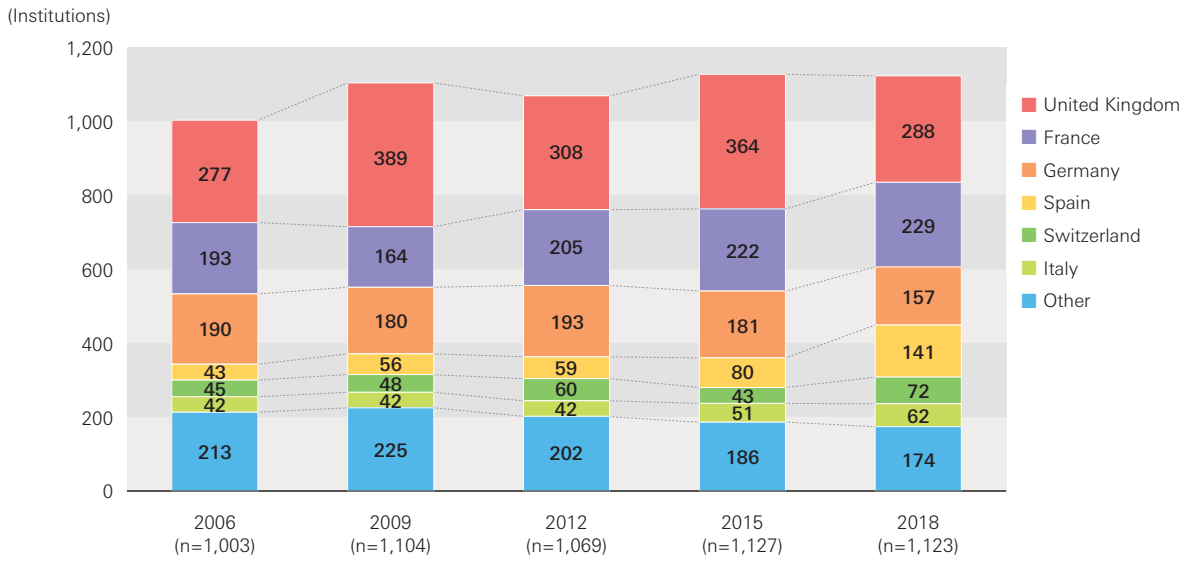
large, but looking at the number of learners per 100,000 population, Ireland (59 people) is top. Looking at the increases and decreases compared with the fiscal 2015 survey by country, the number of institutions has increased in 10 countries, was unchanged in 3 countries, and has decreased in 7 countries; and the number of teachers has increased in 11 countries and has decreased in 9 countries, so the number of countries that increased was higher for both items. The number of learners has increased in 10 countries and decreased in 10 countries. The ratios of the number of learners by educational stage are primary education, 4.6%; secondary education, 17.7%; higher education, 44.2%; and non-school education, 33.6%, so the percentage of the category of non-school education has grown even larger since the previous survey. Furthermore, implementation of Japanese-language education in Monaco was not confirmed in the present survey.

Table 2-8-1 Number of institutions, number of teachers, and number of learners in Western Europe

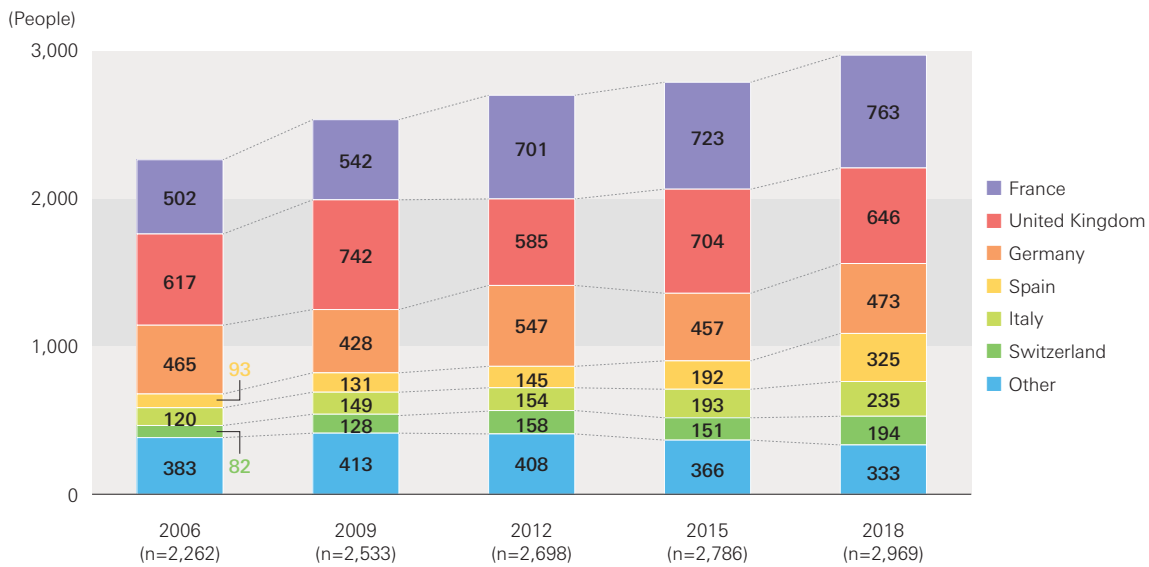
| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|-----------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| France | 222 | 723 | 20,875 | 229 | 763 | 24,150 | 37.6 | 175 | 5,634 | 12,321 | 6,020 | 64,300,821 |
| United Kingdom | 364 | 704 | 20,093 | 288 | 646 | 20,040 | 31.6 | 3,878 | 4,494 | 7,678 | 3,990 | 63,379,787 |
| Germany | 181 | 457 | 13,256 | 157 | 473 | 15,465 | 19.3 | 18 | 1,736 | 7,043 | 6,668 | 80,219,695 |
| Spain | 80 | 192 | 5,122 | 141 | 325 | 8,495 | 18.1 | 5 | 36 | 1,743 | 6,711 | 46,815,915 |
| Italy | 51 | 193 | 7,031 | 62 | 235 | 7,831 | 13.2 | 0 | 706 | 5,639 | 1,486 | 59,433,744 |
| Switzerland | 43 | 151 | 3,709 | 72 | 194 | 3,008 | 37.4 | 4 | 120 | 676 | 2,208 | 8,035,391 |
| Ireland | 40 | 68 | 3,070 | 44 | 67 | 2,803 | 58.9 | 1 | 2,194 | 503 | 105 | 4,761,865 |
| Sweden | 43 | 86 | 2,457 | 29 | 57 | 1,769 | 18.7 | 55 | 353 | 1,186 | 175 | 9,482,855 |
| Netherlands | 15 | 41 | 1,502 | 16 | 40 | 1,496 | 9.0 | 0 | 0 | 1,079 | 417 | 16,655,799 |
| Belgium | 12 | 37 | 1,191 | 5 | 20 | 960 | 8.7 | 0 | 0 | 353 | 607 | 11,000,638 |
| Australia | 12 | 30 | 1,322 | 14 | 28 | 800 | 9.5 | 0 | 41 | 632 | 127 | 8,401,940 |
| Denmark | 4 | 13 | 354 | 15 | 23 | 751 | 13.5 | 0 | 187 | 174 | 390 | 5,560,628 |
| Portugal | 10 | 15 | 573 | 14 | 28 | 682 | 6.6 | 0 | 0 | 185 | 497 | 10,282,306 |
| Norway | 10 | 16 | 505 | 9 | 17 | 640 | 12.9 | 0 | 210 | 389 | 41 | 4,979,955 |
| Greece | 11 | 19 | 479 | 11 | 29 | 608 | 5.6 | 0 | 0 | 0 | 608 | 10,816,286 |
| Finland | 20 | 29 | 1,601 | 6 | 11 | 284 | 5.3 | 0 | 0 | 158 | 126 | 5,375,276 |
| Luxembourg | 3 | 3 | 135 | 6 | 6 | 218 | 42.5 | 0 | 160 | 0 | 58 | 512,353 |
| Iceland | 4 | 7 | 273 | 4 | 5 | 99 | 31.4 | 0 | 53 | 41 | 5 | 315,556 |
| Malta | 1 | 1 | 6 | 1 | 2 | 15 | 3.6 | 0 | 0 | 0 | 15 | 417,432 |
| Monaco | 1 | 1 | 5 | - | - | - | - | - | - | - | - | - |
| Western Europe total | 1,127 | 2,786 | 83,559 | 1,123 | 2,969 | 90,114 | 21.9 | 4,136 | 15,924 | 39,800 | 30,254 | 410,748,242 |

Source: *Population and Vital Statistics Report 2019*, by United Nations

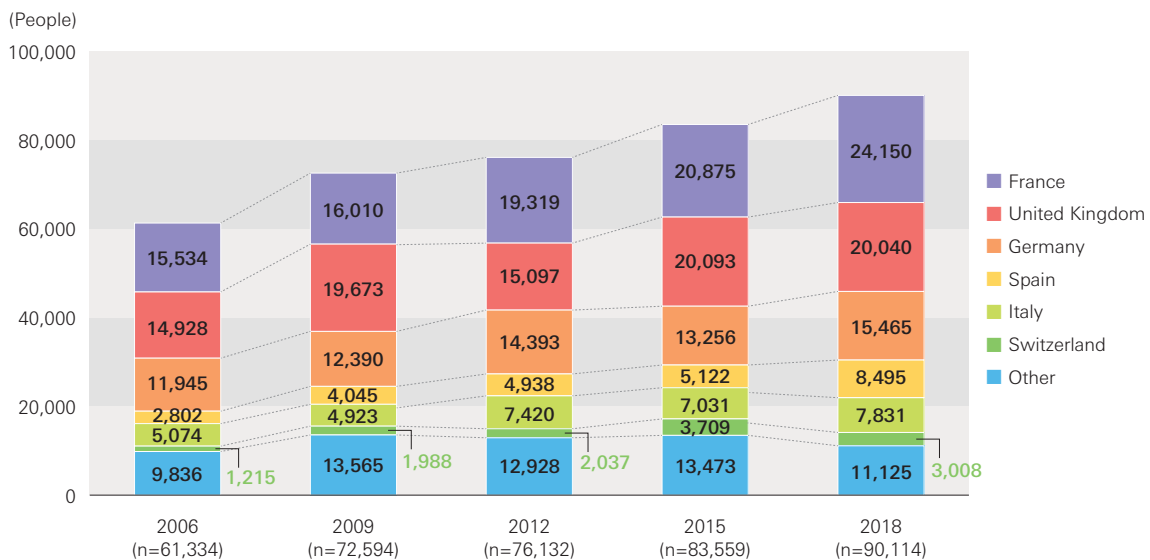
Graph 2-8-1 Number of Institutions in Western Europe



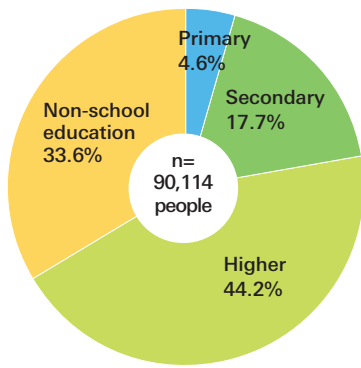
Graph 2-8-2 Number of Teachers in Western Europe



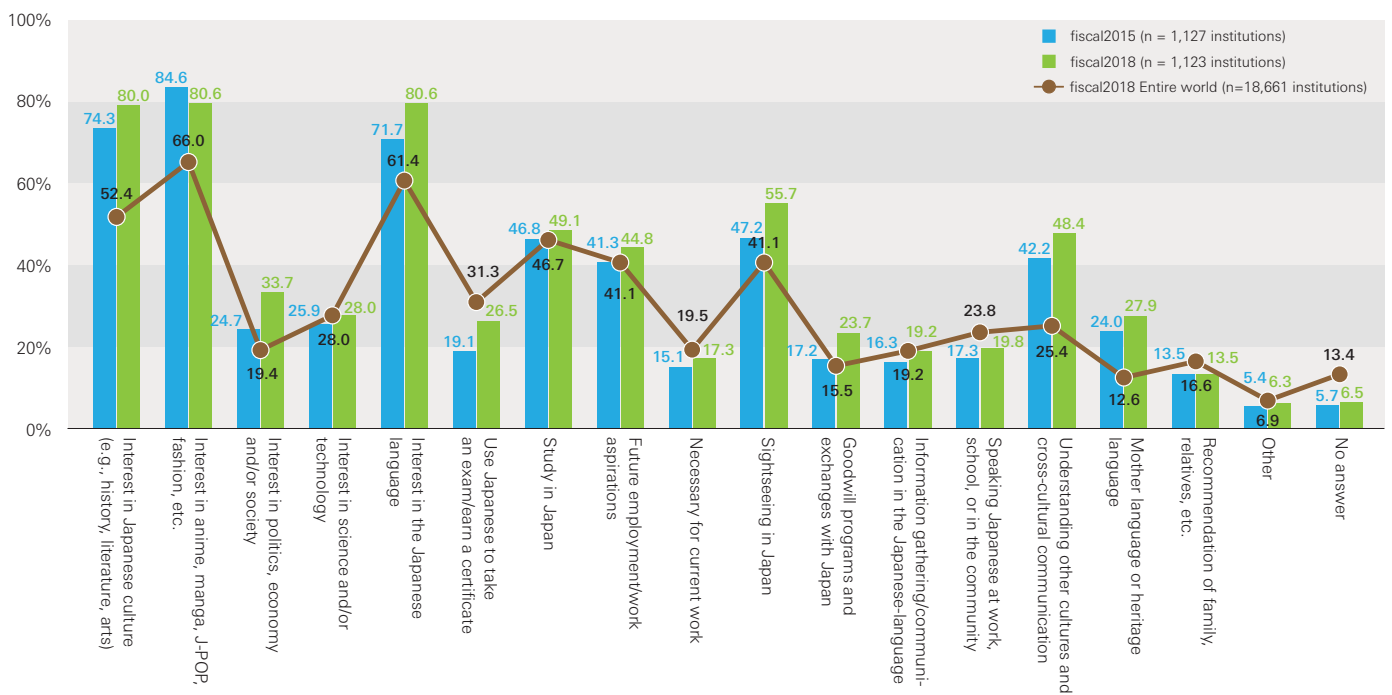
Graph 2-8-3 Number of Learners in Western Europe



Graph 2-8-4 Percentages of learners by educational stage in Western Europe



Graph 2-8-5 Objectives of Japanese-language learning in Western Europe



Trends in each country

[United Kingdom]

In the United Kingdom, which has the greatest number of institutions in Western Europe, the number of institutions and the number of teachers decreased compared to the previous survey and the number of learners was largely unchanged. Looking at the results by educational stage, in primary education and secondary education the number of institutions, the number of teachers, and the number of learners all decreased while on the other hand all of the items increased in higher education and the category of non-school education.

In primary education, foreign-language education was made compulsory in England from 2014 and as a consequence of this Japanese-language education greatly expanded in primary education in the fiscal2015 survey, but the background to the survey results of this survey is thought to be that there were schools that were forced to stop their Japanese-language classes due to continuing financial difficulties and budget squeezes. On the other hand, it is worth noting that there are a substantial number of schools that are continuing classes in the Japanese-language, and the majority of primary educational institutions that are implementing Japanese-language education in Western Europe continue to be schools in the United Kingdom.

In secondary education as well, the reduction of education budgets is similarly a large factor directly leading to the survey results, but in addition there is the reason that more importance is now being placed on STEM (science, technology, engineering, and mathematics) subjects in public education. It is thought that other reasons include the fact that in the spring of 2015 there was a time when the possibility arose that the Japanese-language subject in the university entrance exams (A-Levels) would be abolished, and in addition the fact that there were many teachers who thought that the exams had become more difficult as a consequence of the introduction of the new Japanese-language curriculum in the GCSEs (the general qualification exams for completing secondary education), so Japanese has been avoided as an examination subject.

On the other hand, regarding higher education, in the background the number of universities that are offering Japanese-language classes in not only major courses related to the Japanese-language, but also in faculties of science subjects such as engineering faculties and medical faculties, is increasing. It has been reported that the growth in the number of learners is marked compared to the number of institutions and the number of teachers, and several

universities have not been able to secure a sufficient number of Japanese-language teachers, meaning that there are some university students that want to take Japanese-language courses but are unable to do so. In the category of non-school education, one factor is that there has been a large growth in learners in Japanese-language courses in extension classes and lifelong learning institutions in not only urban areas but also the regional universities.

[France]

In France, which has the greatest number of teachers and greatest number of learners in Western Europe, the number of institutions and the number of teachers increased slightly compared to the previous survey and the number of learners increased by 15.7% compared to the previous survey, reaching a record high.

Looking at the results by educational stage, although its scale is not large, in primary education expansion from the time of the previous survey has been seen. The number of learners at international schools where it is possible to take International Baccalaureate exams in the Japanese language increased from the previous survey, but in those kinds of schools, cases in which the guardians get their children to study the Japanese language as a heritage language are increasing, and actually looking at the survey items concerning learning objectives and reasons, in primary education the highest percentage of respondents selected “Because Japanese is the mother language/the language of family or relatives (heritage language).”

In secondary education, the number of institutions, the number of teachers, and the number of learners all increased by slightly more than 10%. The number of learners in secondary education has been increasing stably throughout the last few surveys, but the characteristic of this data is that most of these learners are learners in curricular subjects, and that percentage is much higher compared to other Western European countries.

In higher education, the number of teachers and the number of learners have both increased since the previous survey while on the other hand the number of institutions has decreased. The number of learners per institutions is increasing.

In the category of non-school education, the number of institutions, the number of teachers, and the number of learners all increased. Most of these are private-sector language schools and organizations, and the percentage of

all institutions in France that they account for is increasing.

Furthermore, looking at the learning objectives and reasons, “interest in anime, manga, J-POP, fashion, etc.” and “interest in history, literature, arts, etc.” came top. Note that *Japonism 2018*, a large-scale and extensive series of events to introduce Japanese culture, was held in France in fiscal2018, and it is thought that many more people than previously have become interested in Japan from a variety of perspectives due to this and for other reasons.

[Germany]

In Germany, where the scale of Japanese-language education is the next largest after the United Kingdom and France, the number of institutions decreased while on the other hand the number of teachers and the number of learners increased.

In primary and secondary education, all of the items decreased, but at the secondary educational stage the first generation of teachers who had been teaching since the time when Japanese-language education began (the first half of the 1980s) have begun to reach retirement age, and looking at the answers from the individual institutions we could ascertain that there are multiple schools concerned about aging faculty staff and the training and hiring of successors. In primary and secondary education, the rate of decrease in the number of teachers is higher than the rate of decrease in the number of institutions and the number of learners, but the decrease in the number of teachers is a problem that directly leads to the offering of Japanese-language classes, and is a local issue.

In higher education, the number of institutions and the number of teachers decreased while on the other hand the number of learners increased. There were many cases in which the number of students taking the courses had increased for individual universities, but in recent years reductions in budgets for non-European zone language education in university education have been advanced in some states.

In the category of non-school education, the number of teachers and the number of learners increased. In the previous survey in fiscal2015, the size of the decrease in the number of learners was large, but the background to this was the effect of the fact that more German courses are being offered in the lifelong learning institutions in each region due to the government policy of accepting refugees. However, the reason for the increase in the present survey is that there were many cases in which there was a big need for the Japanese-language courses that had been

stopped or abolished, so they were gradually resumed and re-expanded. Looking at the regional trends, North Rhine-Westphalia state, the capital Berlin, Baden-Württemberg state, and Bavaria state, which have the greatest number of learners, recorded large increases in the number of learners.

[Spain]

In the present survey, Spain is one of the countries in Western Europe that has expanded its Japanese-language education the most, and the number of institutions, the number of teachers, and the number of learners all recorded large increases. Furthermore, we were able to confirm new institutions in primary education and secondary education, in which Japanese-language education had not been implemented previously. These institutions are all integrated primary and secondary schools, international schools, in cities which offer Japanese-language classes in extra-curricular activities rather than curricular subjects. Note that there are still few cases of primary and secondary educational institutions providing Japanese-language classes, but in the category of non-school education (private-sector language classes, etc.) young learners studying Japanese-language exist in more substantial numbers than before.

In higher education, the number of institutions, the number of teachers, and the number of learners all recorded large increases, a result that shows the big need for Japanese-language education. Furthermore, there are several universities that plan to establish new Master's courses in Japan studies and East Asia studies in Spain going forward, and as a consequence of that the demand for Japanese-language classes is predicted to continue.

All of the items recorded similar large increases in the category of non-school education as well, but over the last few years cases of the Japanese language being introduced in public language schools (EOIs) established by the autonomous communities in Spain have been increasing, and new institutions were confirmed in this survey as well. In the EOIs the tuition fees are kept cheap with government subsidies, and their certificates of completion are certified as public qualifications in Spain, so they are highly popular and there is a large number of learners at each institution. In addition, regarding private-sector language schools centered on large urban areas, many cases in which the number of people enrolled increased compared to the previous survey have been seen, reflecting the growing popularity of Japanese-language learning locally.

[Italy]

In Italy, the number of institutions, the number of teachers, and the number of learners all increased. At several schools, Japanese-language education was implemented as a curricular subject but otherwise implementation of Japanese-language education as an extra-curricular subject is mainstream nationwide, but there are also many cases in which the decision of whether or not to offer it is made after commencement of a semester, so in some respects it is difficult to conclude that Japanese-language education is being implemented stably.

In higher education, this survey newly confirmed the implementation of Japanese-language education at several technical universities and universities for foreigners, and the number of learners has also increased. On the other hand, there was only a slight increase in the number of institutions and the number of teachers, so we can conclude that the substantial trends are largely unchanged.

We were able to ascertain once again that the category of non-school education increased similarly to higher education but there are the issues that non-school education is small-scale, there are a comparatively large number of new institutions, and institutions that can offer Japanese-language courses at a variety of levels over the long term are limited.

[Other countries and regions]

Looking at the other countries, in Switzerland, where Japanese-language education is comparatively thriving in the region, we could confirm 72 institutions, a result that is higher than Italy. On the other hand, the number of learners in the country overall has decreased since the previous survey, and the number of institutions, the number of teachers, and the number of learners have decreased in all of the stages from primary education to higher education. In primary education, there is a trend of the budgets for elective subject classes to be reduced in each canton, and the number of classes in the Japanese-language, which is a foreign-language subject, has decreased.

Furthermore, in Ireland, which has a high number of learners relative to its population, the number of institutions increased and the number of teachers and the number of learners declined slightly.

In Monaco, where implementation of Japanese-language education had been confirmed up until the previous survey, the private-sector organization which had been the only institution in the country stopped its activities, so in the present survey the result is that no Japanese-language education has been implemented in this country.

9. Eastern Europe

There were increases in Russia and Poland, where there are large numbers of learners, and in the Central Asian region the increase in Turkmenistan was particularly marked

Status of Japanese-language education in Eastern Europe

In Eastern Europe the number of institutions is 477 institutions (up 19.8%), the number of teachers is 1,652 (up 22.7%), and the number of learners is 36,836 (up 35.7%), so all of the items have increased since the previous survey. The countries with the greatest number of institutions are Russia (169), Poland (48), Hungary (39), Serbia (23), and the Czech Republic (21), and the greatest number of teachers is in the order of Russia (633), Poland (200), Ukraine (97), Hungary (95), and Romania (87). The number of learners is in the order of Russia (11,764), Poland (4,483), Turkmenistan (3,259), Uzbekistan (2,288), and Ukraine (2,174), and countries in Central Asia, Turkmenistan and Uzbekistan, are rapidly growing in third place and below. Looking at the increases and decreases compared to the previous survey in fiscal2015, the number

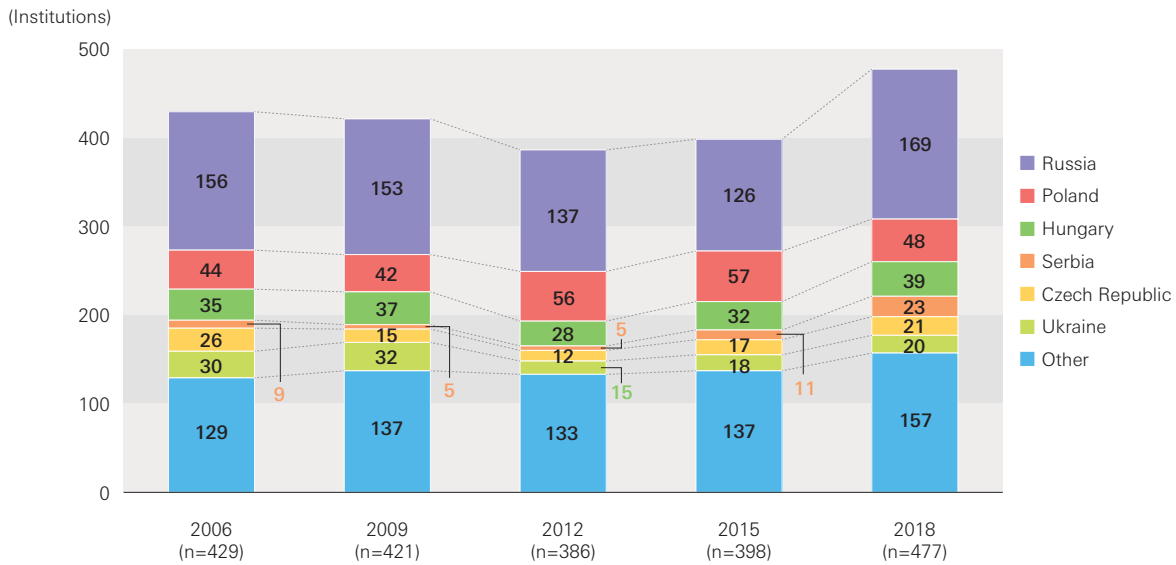
of institutions has increased in 18 countries, is unchanged in 2 countries, and has decreased in 8 countries; and the number of teachers has increased in 19 countries, is unchanged in 1 country, and has decreased in 8 countries, so both of these items recorded increases in the greater number of countries. Furthermore, the implementation of Japanese-language education was newly confirmed in Montenegro in the present survey. Note that the number of learners has increased in 23 countries and has decreased in 5 countries. The ratios of the number of learners by educational stage are primary education, 7.5%; secondary education, 22.1%; higher education, 37.8%; and non-school education, 32.7%, so the ratios accounted for by secondary education (17.6% in the previous survey) and non-school education (30.1% in the previous survey) have grown larger since the previous survey.

Table 2-9-I Number of institutions, number of teachers, and number of learners in Eastern Europe

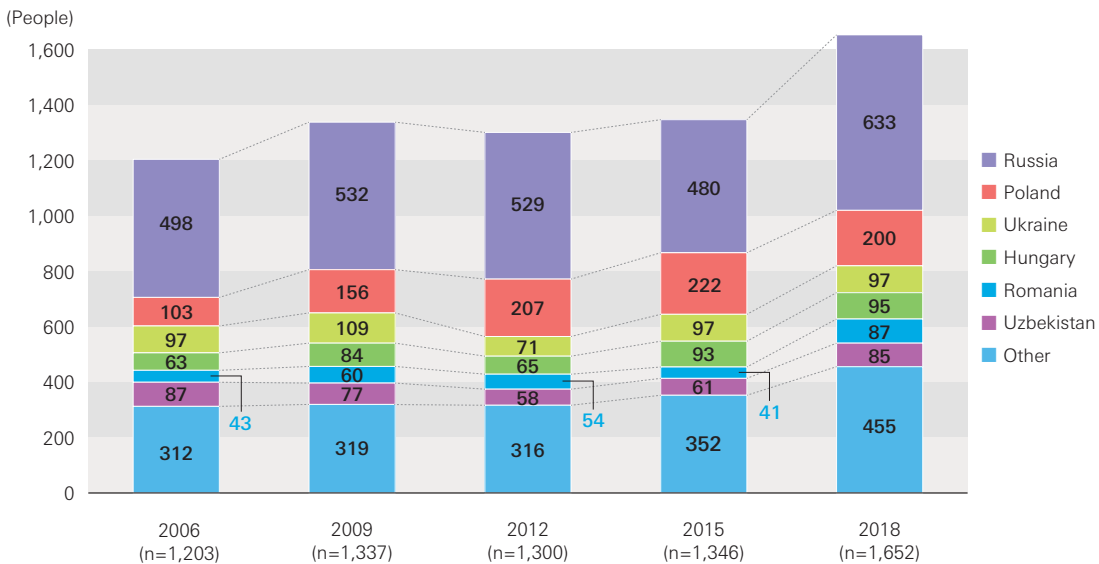
| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|-----------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| Russia | 126 | 480 | 8,650 | 169 | 633 | 11,764 | 8.2 | 1,059 | 3,257 | 3,497 | 3,951 | 143,436,145 |
| Poland | 57 | 222 | 4,416 | 48 | 200 | 4,483 | 11.8 | 0 | 308 | 2,364 | 1,811 | 38,044,565 |
| Turkmenistan | 1 | 5 | 49 | 9 | 35 | 3,259 | 72.7 | 0 | 1,590 | 1,669 | 0 | 4,483,251 |
| Uzbekistan | 14 | 61 | 1,505 | 15 | 85 | 2,288 | 11.5 | 10 | 182 | 868 | 1,228 | 19,810,077 |
| Ukraine | 18 | 97 | 1,523 | 20 | 97 | 2,174 | 4.5 | 209 | 465 | 809 | 691 | 48,240,902 |
| Hungary | 32 | 93 | 1,992 | 39 | 95 | 1,906 | 19.2 | 139 | 328 | 949 | 490 | 9,937,628 |
| Kyrgyz | 23 | 48 | 924 | 19 | 47 | 1,606 | 31.4 | 503 | 410 | 388 | 305 | 5,107,640 |
| Romania | 18 | 41 | 2,052 | 14 | 87 | 1,389 | 6.9 | 25 | 50 | 585 | 729 | 20,039,141 |
| Bulgaria | 7 | 33 | 1,245 | 8 | 40 | 1,347 | 18.3 | 400 | 539 | 142 | 266 | 7,364,570 |
| Czech Republic | 17 | 53 | 1,175 | 21 | 73 | 1,246 | 11.9 | 0 | 51 | 651 | 544 | 10,436,560 |
| Serbia | 11 | 31 | 533 | 23 | 35 | 797 | 11.1 | 167 | 171 | 378 | 81 | 7,186,862 |
| Latvia | 3 | 8 | 156 | 2 | 4 | 697 | 33.7 | 163 | 405 | 129 | 0 | 2,070,371 |
| Kazakhstan | 5 | 30 | 297 | 10 | 35 | 451 | 2.8 | 0 | 48 | 149 | 254 | 16,009,597 |
| Belarus | 8 | 16 | 305 | 9 | 27 | 415 | 4.4 | 0 | 0 | 136 | 279 | 9,503,807 |
| Estonia | 11 | 17 | 317 | 14 | 25 | 390 | 30.1 | 0 | 120 | 129 | 141 | 1,294,455 |
| Georgia | 5 | 12 | 237 | 6 | 18 | 385 | 10.4 | 0 | 0 | 111 | 274 | 3,713,804 |
| Lithuania | 6 | 10 | 301 | 11 | 17 | 373 | 12.3 | 10 | 112 | 167 | 84 | 3,043,429 |
| Slovenia | 1 | 8 | 275 | 6 | 19 | 312 | 15.1 | 0 | 10 | 145 | 157 | 2,062,874 |
| Slovakia | 9 | 22 | 275 | 8 | 16 | 259 | 4.8 | 0 | 0 | 46 | 213 | 5,397,036 |
| Azerbaijan | 4 | 9 | 239 | 5 | 12 | 255 | 2.9 | 46 | 50 | 95 | 64 | 8,922,447 |
| Armenia | 9 | 23 | 235 | 6 | 21 | 217 | 7.6 | 9 | 43 | 45 | 120 | 2,871,771 |
| Albania | 1 | 2 | 15 | 1 | 1 | 200 | 7.1 | 0 | 0 | 200 | 0 | 2,800,138 |
| Croatia | 5 | 11 | 175 | 7 | 19 | 199 | 4.6 | 7 | 0 | 45 | 147 | 4,284,889 |
| Tajikistan | 3 | 9 | 77 | 2 | 4 | 186 | 2.5 | 0 | 0 | 186 | 0 | 7,564,502 |
| Moldova | 1 | 2 | 75 | 1 | 3 | 115 | 4.1 | 0 | 0 | 0 | 115 | 2,805,194 |
| Bosnia and Herzegovina | 2 | 2 | 88 | 1 | 1 | 65 | 1.8 | 0 | 0 | 0 | 65 | 3,531,159 |
| North Macedonia | 1 | 1 | 23 | 2 | 2 | 49 | 2.4 | 0 | 0 | 30 | 19 | 2,022,547 |
| Montenegro | - | - | - | 1 | 1 | 9 | 1.5 | 0 | 0 | 0 | 9 | 620,029 |
| Eastern Europe total | 398 | 1,346 | 27,154 | 477 | 1,652 | 36,836 | 9.4 | 2,747 | 8,139 | 13,913 | 12,037 | 392,605,390 |

Source: Population and Vital Statistics Report 2019, by United Nations

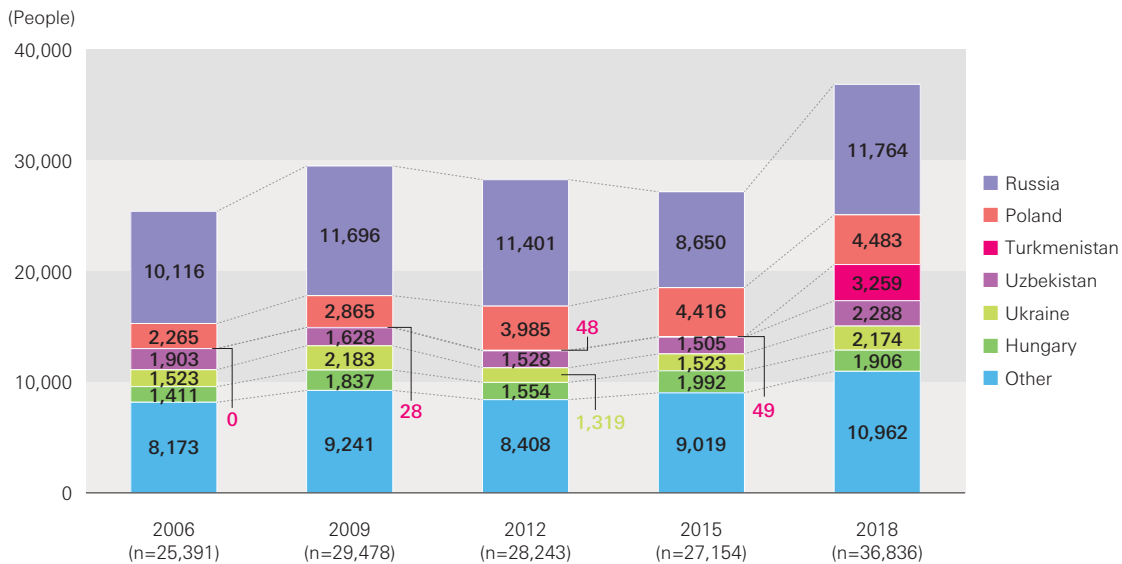
Graph 2-9-1 Number of Institutions in Eastern Europe



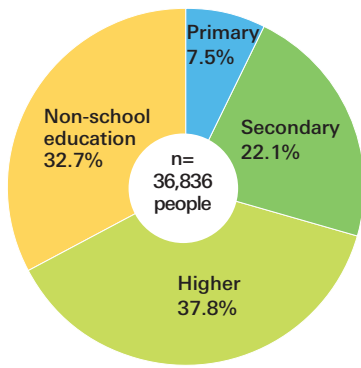
Graph 2-9-2 Number of Teachers in Eastern Europe



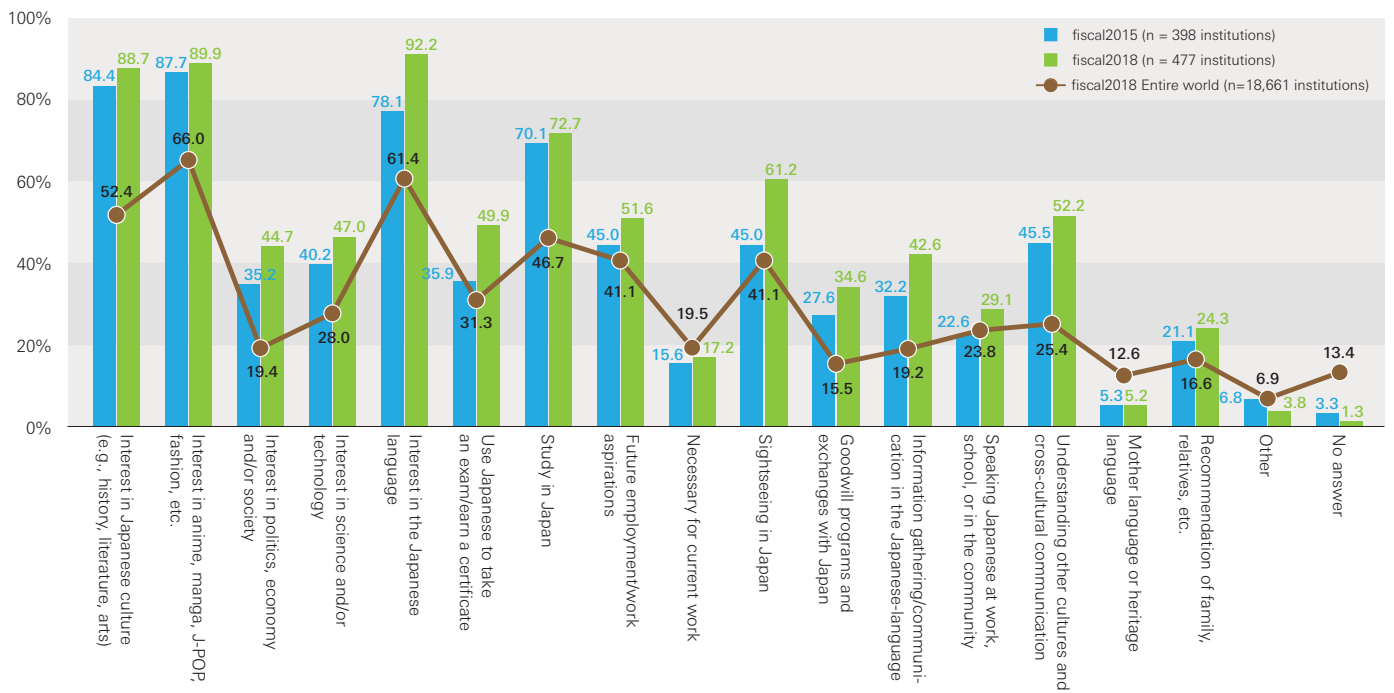
Graph 2-9-3 Number of Learners in Eastern Europe



Graph 2-9-4 Percentages of learners by educational stage in Eastern Europe



Graph 2-9-5 Objectives of Japanese-language learning in Eastern Europe



Trends in each country and region

[Russia]

In Russia, which has the largest scale of Japanese-language education in Eastern Europe, the number of institutions, the number of teachers, and the number of learners all increased by more than 30% compared to the previous survey. Since the previous survey, conditions for getting Japanese visas were relaxed in 2017, the number of direct flights with Japan has been increased and routes connecting Russia's regional cities to Japan have newly gone into service, and for these and other reasons the number of tourists visiting Japan from Russia has shown large growth. Furthermore, over the 2 years from 2017 the Japan-Russia Exchange Year (Japan Year in Russia) was implemented and events in a diverse range of fields were held in 59 cities in Russia. This also led to a large expansion of interest in and understanding of Japanese-language and Japanese culture, and it is thought that these kinds of developments form the background to the increase in institutions offering Japanese-language courses and the increase in learners.

Looking at the results for each educational stage, in primary education the number of learners continued to decrease from 2009 until the previous survey, but in this survey the number of learners exceeded 1,000 people again. Furthermore, the number of institutions, the number of teachers, and the number of learners all increased in secondary education as well.

In higher education, institutions that had newly offered courses and increased the student quota were confirmed in Moscow and Kazan, while on the other hand institutions that had closed down Japanese-language courses as a consequence of the reorganization of academic departments were also seen, so the results were that in higher education overall the number of learners increased and the number of institutions and the number of teachers decreased. In non-school education, all of the items are higher than the results in the previous survey, the demand for Japanese-language learning is reflected more easily compared to school education, and it is thought that the interest in Japan resulting from the holding of the above Japan-Russia Exchange Year project and the boom in tourism to Japan is in the reason for this.

Looking at the trends by region, the number of institutions and the number of learners is greatest in the Far Eastern Federal District containing Vladivostok and Khabarovsk, which are geographically closer to Japan and have more thriving human and economic exchanges with Japan

than other districts. Furthermore, compared to primary, secondary, and higher education in which there are large differences in increases and decreases among regions, in the category of non-school education increases have been seen across the board regardless of the region.

[Poland]

In Poland, where the scale of Japanese-language education is the largest after Russia in the Eastern Europe region, the number of institutions and the number of teachers have decreased, and the number of learners has increased slightly. In secondary education, where Japanese-language education is implemented primarily in extra-curricular activities, new institutions have been confirmed so the number of learners has increased, and in higher education, which accounts for more than half of the number of learners in the country, the number of learners has increased slightly while on the other hand it declined slightly in non-school education.

[Hungary]

In Hungary, the number of institutions and the number of teachers have increased, but the number of learners has declined slightly. In each stage except secondary education the number of learners has decreased, and that trend is particularly marked in regional cities other than the capital, Budapest. A factor behind the decrease in the number of learners in regional cities is that in some higher educational institutions, courses that are not offered if a certain number of learners do not join them are prominent. Furthermore, it is thought that several institutions do not directly employ teachers but rather rely on teachers being dispatched from Japanese institutions and organizations, so the management of Japanese-language courses is unstable. In regional cities the number of learners has decreased while on the other hand in higher educational institutions in Budapest the number of learners has increased.

Furthermore, institutions implementing Japanese-language courses are increasing in secondary education and the number of learners is also increasing. In Hungary, Japanese-language was removed from the subjects in the high-school graduation qualification certification exam and university entrance exam system (*érettségi*) in 2011, but from 2015 Japanese-language was introduced again and currently it is continuing to be certified as an exam subject. It is thought that this kind of change to the

entrance-exam system is having an effect on Japanese-language education.

[Turkmenistan]

Looking at the Central Asia region, the rapid expansion of Japanese-language education in Turkmenistan is deserving of attention. After a Japanese-language major was established in the Turkmen National Institute Of Foreign Languages, Named After D. Azadi (hereinafter referred to as “Azadi University”) in 2007 there continued to be a situation in which there was only 1 institution, but from fiscal2016 Japanese-language education was commenced at other universities and secondary educational institutions as well. It is necessary to note that the scale of Japanese-language education was small previously so straightforward comparisons cannot be made, but the rates of increase in the number of institutions, the number of teachers, and the number of learners in the country overall compared to the previous survey are the highest figures in the world.

Note that many of the teachers teaching at the institutions are graduates of Azadi University who previously worked at schools as English teachers. At this university the number of students enrolling in the Japanese-language major is increasing year by year, but the training and supply of faculty staff is not keeping pace with the rapidly-increasing number of students taking the courses, and there are concerns locally.

[Uzbekistan]

Turkmenistan has the greatest number of learners in Central Asia in the present survey, but Uzbekistan continues to have the greatest number of institutions and number of teachers in the Central Asia region, and both increased in the present survey as well. The number of learners also increased compared to the previous survey and reached a record high, passing 2,000 people for the first time. Japanese-language education is expanding stably in all of the educational stages, and in particular, regarding higher educational institutions, there are an increasing number of students studying in Japan based on the Ministry of Public Education’s subsidized foreign study program and the agreements between universities which are increasing year by year. On the other hand, the salary levels of teachers are low, so there are many teachers who work at multiple institutions concurrently or have second jobs, and the attrition rate is high so the question of whether teachers can be trained and supplied stably is an issue in this country.

10. The Middle East

Turkey, which accounts for half of the learners in the region, has increased since the previous survey, and the number of learners has increased in two-thirds of the countries in the region

Status of Japanese-language education in the Middle East

In the Middle East the number of institutions is 71 institutions (down 5.3%), the number of teachers is 176 (down 5.9%), and the number of learners is 4,948 (up 22.1%). The only country with a double-digit number of institutions is Turkey (34), which is followed by the 9 institutions in the United Arab Emirates and Israel. Regarding the number of teachers, the countries that follow Turkey with 85 people are the United Arab Emirates, with 29 people; and Israel, with 16 people. Turkey also accounts for the overall majority of the number of learners with 2,500 people, followed by Israel, with 491 people; Iraq, with 485 people; and the United Arab Emirates with 406 people. Looking at the increases and decreases from the previous survey by country, the number of

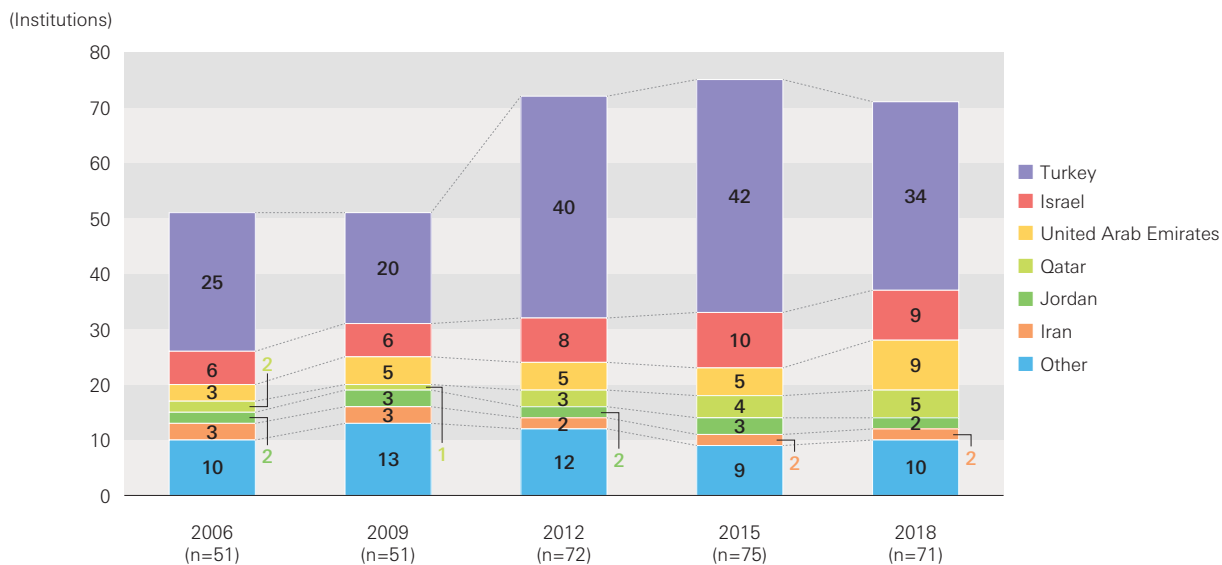
institutions has increased in 5 countries, is unchanged in 4 countries, and has decreased in 5 countries; the number of teachers has increased in 5 countries, is unchanged in 2 countries, and has decreased in 7 countries; and the number of learners has increased in 10 countries and has decreased in 4 countries. Note that this survey could not confirm implementation of Japanese-language education in Afghanistan or Syria while on the other hand we were able to confirm that Japanese-language education has resumed in Iraq. The percentages of the number of learners by educational stage are primary education, 8.6%; secondary education, 6.0%; higher education, 55.9%; and non-school education, 29.5%, and the characteristic that Japanese-language education is mainly being implemented in universities was seen.

Table 2-10-1 Number of institutions, number of teachers, and number of learners in Middle East

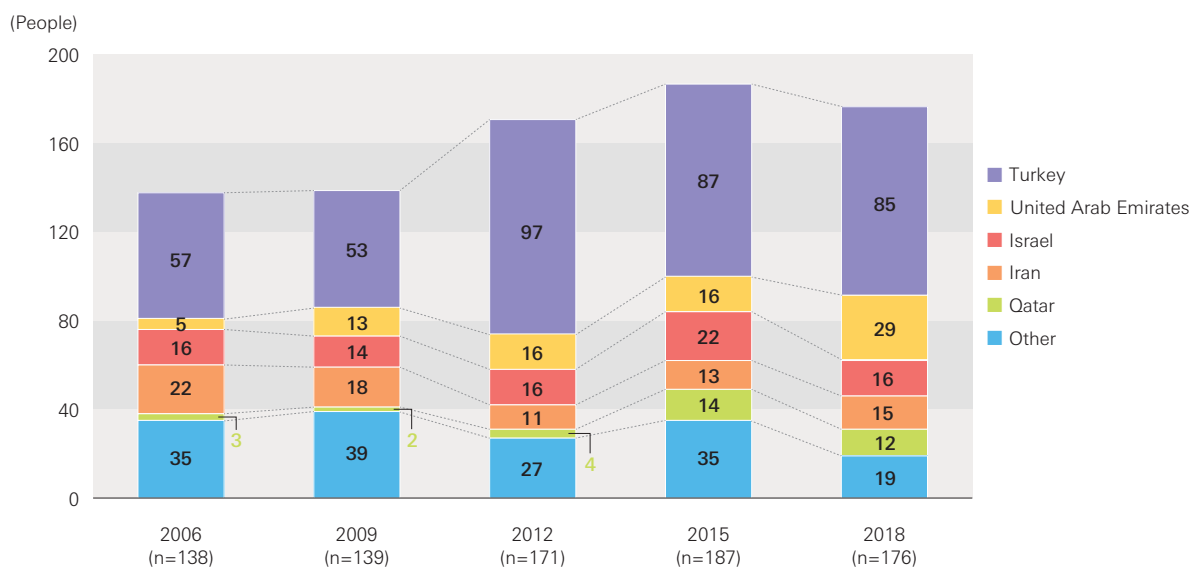
| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|--------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| Turkey | 42 | 87 | 2,194 | 34 | 85 | 2,500 | 3.4 | 0 | 155 | 1,788 | 557 | 74,526,000 |
| Israel | 10 | 22 | 458 | 9 | 16 | 491 | 6.6 | 0 | 0 | 231 | 260 | 7,412,180 |
| Iraq | - | - | - | 2 | 4 | 485 | 2.5 | 425 | 0 | 60 | 0 | 19,184,543 |
| United Arab Emirates | 5 | 16 | 395 | 9 | 29 | 406 | 9.9 | 0 | 81 | 72 | 253 | 4,106,427 |
| Qatar | 4 | 14 | 146 | 5 | 12 | 256 | 10.6 | 0 | 60 | 100 | 96 | 2,404,776 |
| Jordan | 3 | 9 | 166 | 2 | 3 | 250 | 2.6 | 0 | 0 | 250 | 0 | 9,531,712 |
| Iran | 2 | 13 | 227 | 2 | 15 | 215 | 0.3 | 0 | 0 | 97 | 118 | 79,926,270 |
| Bahrain | 2 | 2 | 95 | 2 | 2 | 110 | 8.9 | 0 | 0 | 35 | 75 | 1,234,571 |
| Oman | 1 | 1 | 20 | 2 | 2 | 75 | 2.7 | 0 | 0 | 50 | 25 | 2,773,479 |
| Kuwait | 1 | 3 | 55 | 1 | 2 | 65 | 2.1 | 0 | 0 | 0 | 65 | 3,065,850 |
| Saudi Arabia | 1 | 4 | 27 | 1 | 4 | 60 | 0.2 | 0 | 0 | 60 | 0 | 27,236,156 |
| Lebanon | 1 | 1 | 63 | 2 | 2 | 35 | 0.9 | 0 | 0 | 25 | 10 | 3,779,859 |
| Syria | 2 | 13 | 168 | - | - | - | - | - | - | - | - | - |
| Afghanistan | 1 | 2 | 40 | - | - | - | - | - | - | - | - | - |
| Middle East total | 75 | 187 | 4,054 | 71 | 176 | 4,948 | 2.1 | 425 | 296 | 2,768 | 1,459 | 235,181,823 |

Source: Population and Vital Statistics Report 2019, by United Nations

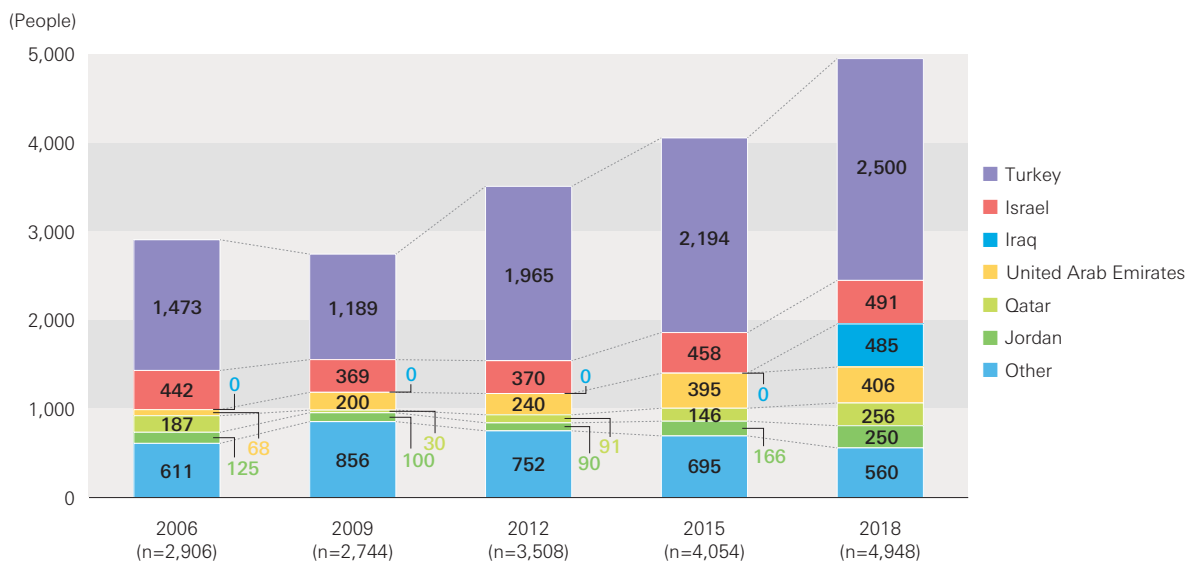
Graph 2-10-1 Number of Institutions in the Middle East



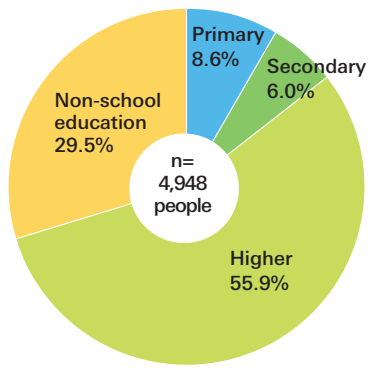
Graph 2-10-2 Number of Teachers in the Middle East



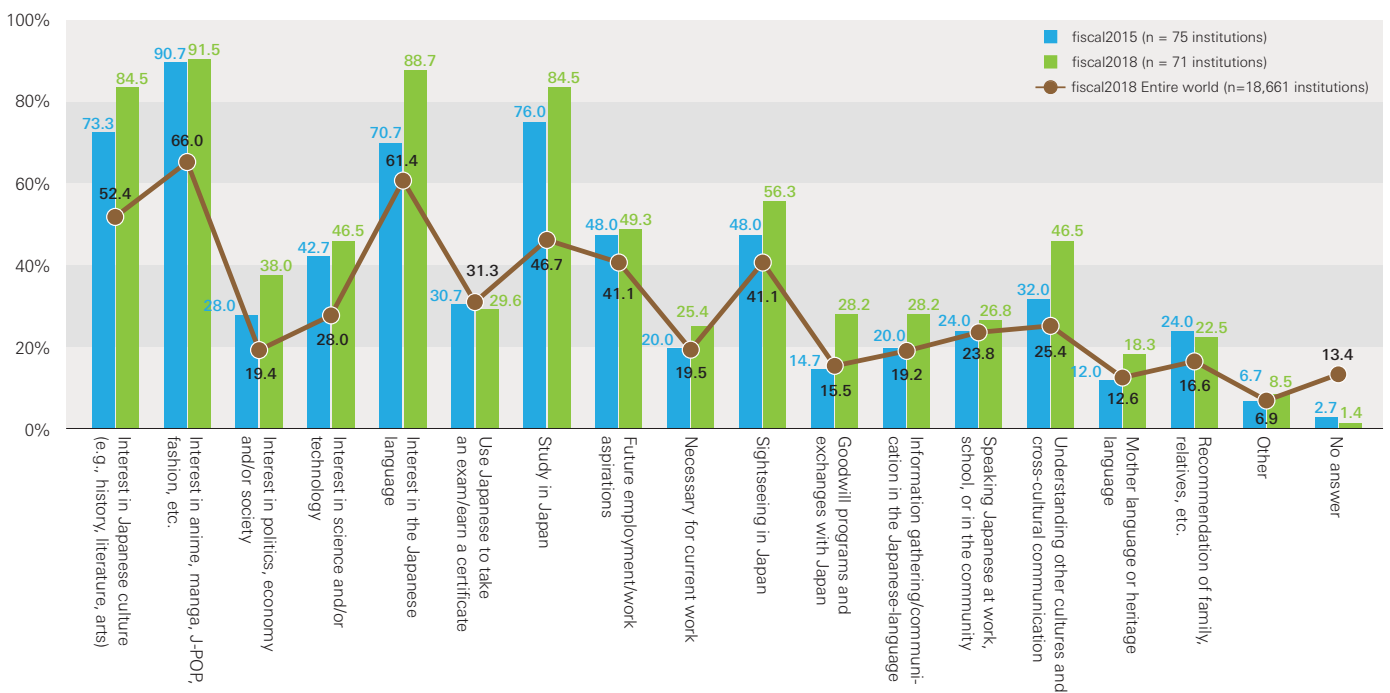
Graph 2-10-3 Number of Learners in the Middle East



Graph 2-10-4 Percentages of learners by educational stage in the Middle East



Graph 2-10-5 Objectives of Japanese-language learning in the Middle East



Trends in each country and region

[Turkey]

In Turkey, which has the largest-scale Japanese-language education in the Middle East region, the number of institutions and the number of teachers decreased in the present survey while on the other hand the number of learners increased. Higher education accounts for about 70% of the number of institutions, the number of teachers, and the number of learners in Turkey's Japanese-language education, and the category of non-school education has the next greatest number of all three items. Several private universities were closed in the declaration of a state of emergency after the *coup d'état* attempt in July 2016; furthermore, cases of temporary cancellation of open courses for the general public continued, and there is a possibility that these events influenced the results. Nonetheless, the number of people studying Japanese-language is continuing to increase because Turkey has deep ties to Japan historically and because there is a need for the Japanese-language in the industries related to tourism.

[Other countries and regions]

In the United Arab Emirates, the number of institutions, the number of teachers, and the number of learners all increased. In recent years, a series of Japanese-language courses have been established in major universities in the country, and the number of institutions in higher education has increased since the previous survey, and in addition the number of learners enrolled in private-sector institutions has recorded a large increase.

In Israel, the number of institutions and the number of teachers decreased while on the other hand learners

increased. In 2015, taking the opportunity of Prime Minister Abe's visit to Israel accompanying an economic mission from Japan, the amount of investment and exports from Japan increased, resulting in an increase in adult learners who have opportunities to deal with Japan, mainly for business.

In addition, in Iran the number of learners decreased, while on the other hand the number of teachers increased slightly; in Saudi Arabia the number of learners increased, and in Qatar the number of teachers decreased while on the other hand the number of institutions and the number of learners increased.

Furthermore, as previously noted, in the present survey we confirmed implementation of Japanese-language education in Iraq for the first time since the fiscal1984 survey 34 years ago. After the previous survey Japanese-language courses were offered at the College of Arts, University of Baghdad, and in addition classes in the Japanese-language were confirmed at a municipal primary school in Baghdad.

Note that in this survey Japanese-language education could not be confirmed in Afghanistan or Syria. Regarding Afghanistan, volunteers from a domestic Japan alumni association were implementing Japanese-language courses at Kabul University in the capital, but they were stopped in 2016 because they were difficult to run due to the shortage of teachers and unstable public security and economic situation. Regarding Syria too, at the time of the previous survey in fiscal2015 implementation of Japanese-language education was confirmed at two universities, but there is a severe situation due to the Civil War, so subsequently recruitment of new students was stopped at each university and they stopped offering the courses.

11. North Africa

Egypt, which accounts for 60% of the number of learners in the region, reached a record-high number of learners

Status of Japanese-language education in North Africa

In North Africa the number of institutions is 36 institutions (up 71.4%), the number of teachers is 147 people (up 22.5%), and the number of learners is 2,569 people (up 44.6%), so all of the items have increased since the fiscal2015 survey. Egypt accounts for more than half of the number of institutions with 21, and all of the other countries are in single digits. Egypt also accounts for more than 80% of the number of teachers in the region overall, with 120 people; followed by Morocco with 15 people. Similarly, Egypt accounts for more than 60% of the number of learners in the region, with 1,602 people; followed by Morocco with 547 people. All of the other

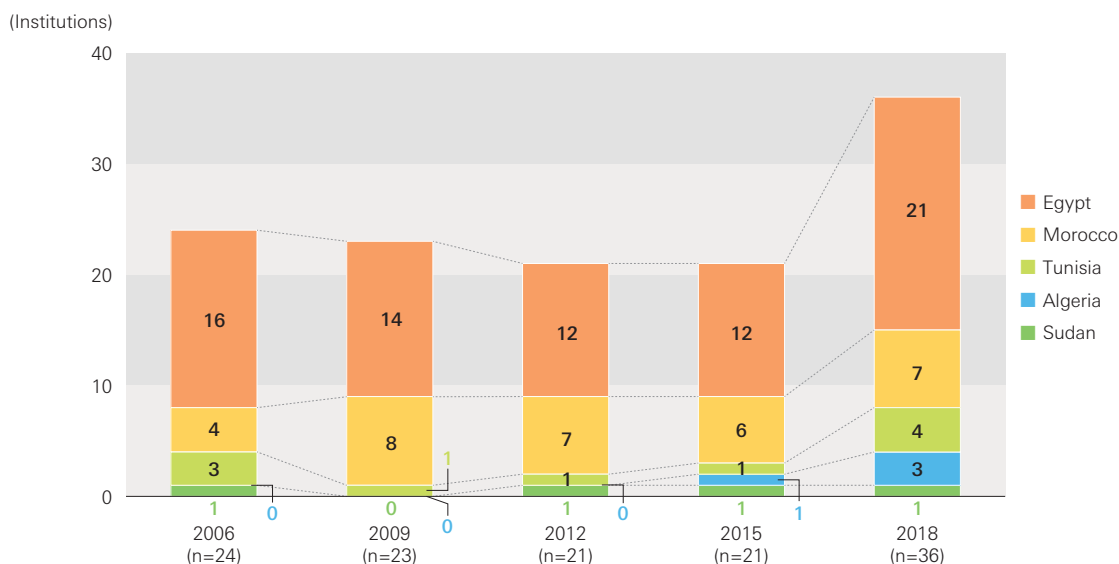
countries have between 100 and 200 people. Looking at the increases and decreases from the fiscal2015 survey by country, the number of institutions and the number of teachers has increased in the 4 countries other than Sudan, where there was no change from the previous survey, and the number of learners has increased in the 3 countries of Algeria, Egypt, and Tunisia, while on the other hand it has decreased in the 2 countries of Sudan and Morocco. The percentages of the number of learners by educational stage are secondary education, 5.8%; higher education, 50.4%; and non-school education, 43.9%. Note that there is no implementation of Japanese-language education in primary education.

Table 2-11-1 Number of institutions, number of teachers, and number of learners in North Africa

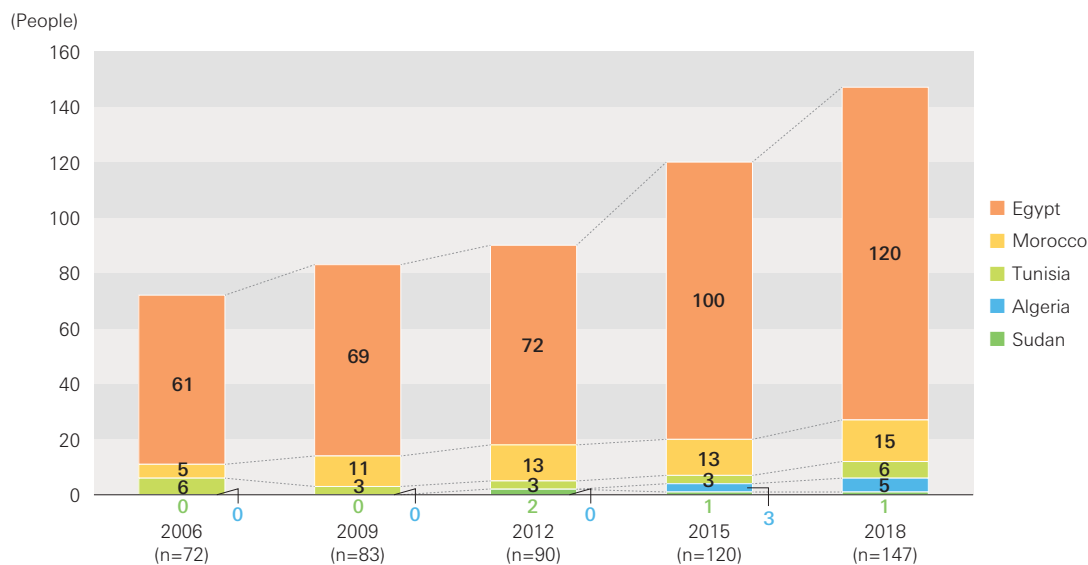
| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|---------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| Egypt | 12 | 100 | 832 | 21 | 120 | 1,602 | 1.7 | 0 | 148 | 972 | 482 | 94,798,827 |
| Morocco | 6 | 13 | 665 | 7 | 15 | 547 | 1.6 | 0 | 0 | 267 | 280 | 33,848,242 |
| Tunisia | 1 | 3 | 113 | 4 | 6 | 185 | 1.7 | 0 | 0 | 55 | 130 | 10,982,754 |
| Sudan | 1 | 1 | 150 | 1 | 1 | 130 | 0.4 | 0 | 0 | 0 | 130 | 30,894,000 |
| Algeria | 1 | 3 | 17 | 3 | 5 | 105 | 0.3 | 0 | 0 | 0 | 105 | 34,452,759 |
| North Africa total | 21 | 120 | 1,777 | 36 | 147 | 2,569 | 1.3 | 0 | 148 | 1,294 | 1,127 | 204,976,582 |

Source: Population and Vital Statistics Report 2019, by United Nations

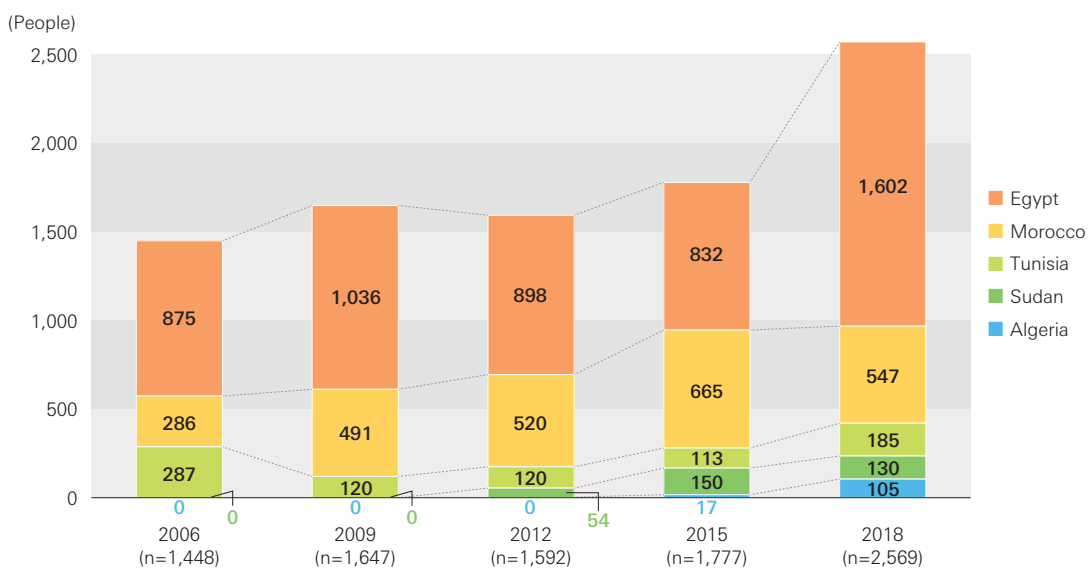
Graph 2-11-1 Number of Institutions in North Africa



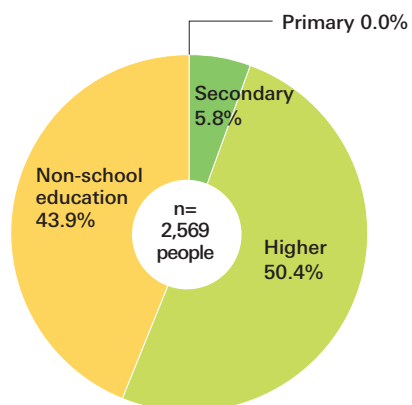
Graph 2-II-2 Number of Teachers in North Africa



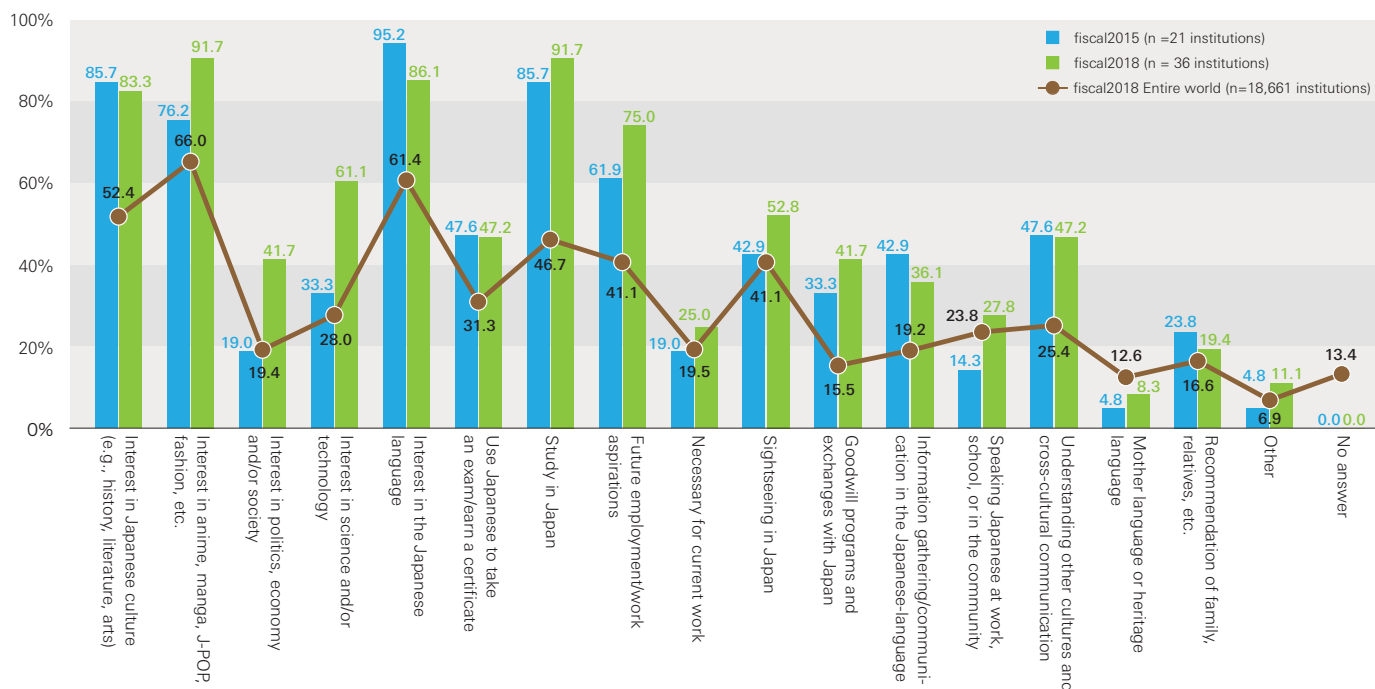
Graph 2-II-3 Number of Learners in North Africa



Graph 2-II-4 Percentages of learners by educational stage in North Africa



Graph 2-11-5 Objectives of Japanese-language learning in North Africa



Trends in each country

[Egypt]

In Egypt, which has the largest scale of Japanese-language education in North Africa, the number of institutions, the number of teachers, and the number of learners all increased. In the previous survey, the number of institutions and the number of learners in tourism training schools and private-sector language schools had decreased, partly due to the unstable social and economic conditions after the 2011 revolution, but in the present survey all of the items are at a record high.

The growth in the number of learners was largest in higher education, but in addition to the universities that had a Japanese-language major before, over the last few years a series of new majors have been established, and in particular the introduction of classes in the Japanese-language as compulsory subjects for undergraduates in the Egypt-Japan University of Science and Technology (E-JUST) from 2017 is having an effect on these results.

Furthermore, in non-school education as well, the number of institutions, the number of teachers, and the number

of learners has increased. The reason for this is that the number of private-sector language schools has increased since the previous survey, but we can conclude that Japanese-language education in non-school education is still in a situation that is easily influenced by the trends in the tourism industry.

[Other countries and regions]

In Morocco, where the scale of Japanese-language education is the largest after Egypt in the region, the number of institutions and the number of teachers increased but the number of learners decreased. The number of learners increased in higher education, with the open courses offered by JICA volunteers dispatched to urban universities playing a central role in this. The number of learners in non-school education decreased in the present survey, partly due to the fact that implementation of Japanese-language education could not be confirmed in several private institutions.

12. Africa

Japanese-language education has expanded primarily in countries with a large number of learners, such as Côte d'Ivoire, Kenya, Madagascar, Ghana, etc.

Status of Japanese-language education in Africa

In Africa the number of institutions is 95 institutions (up 39.7%), the number of teachers is 216 people (up 71.4%), and the number of learners is 10,804 people (up 52.3%), so all of the items have recorded large increases since the previous survey. In the fiscal2018 survey the existence of Japanese-language educational institutions could be confirmed in 15 countries out of the total of 54 countries in Africa. The countries with the greatest number of institutions are in the order Kenya (43), Madagascar (20), and Côte d'Ivoire (11), and the order for countries with the greatest number of teachers is Kenya, with 111 people; Madagascar, with 47 people; and Côte d'Ivoire and Ghana, with 16 people. On the other hand, Côte d'Ivoire has the greatest number of learners with 3,392 people, followed by

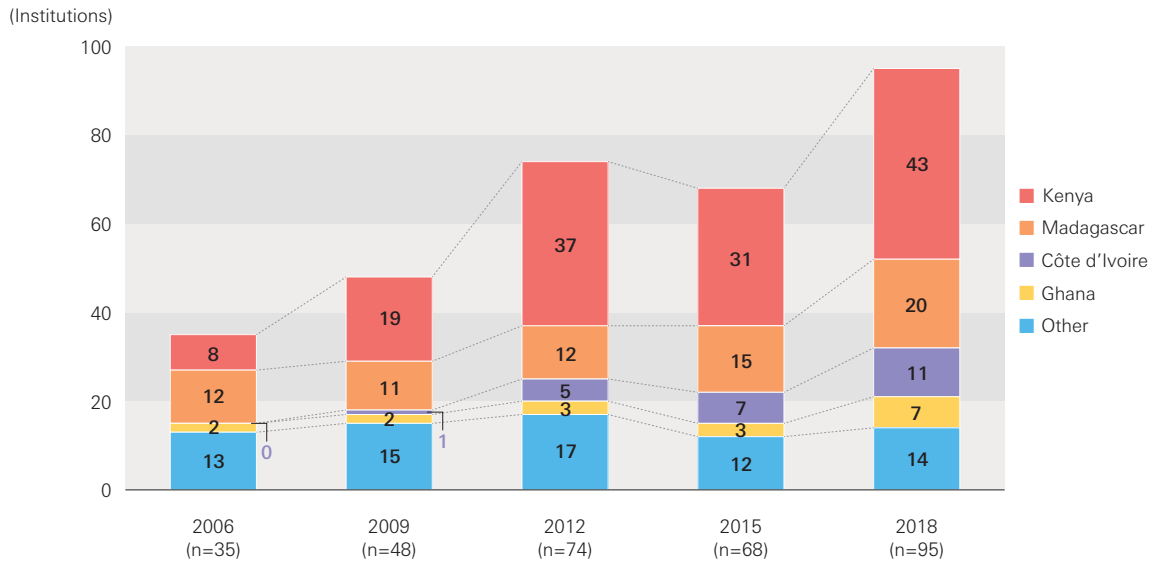
Kenya, with 2,573 people; Madagascar, with 2,532 people; and Ghana, with 939 people. Looking at the increases and decreases from the previous survey, the number of institutions has increased in 7 countries, is unchanged in 6 countries, and has decreased in 2 countries; the number of teachers has increased in 8 countries, is unchanged in 1 country, and has decreased in 6 countries; and the number of learners has increased in 12 countries and has decreased in 3 countries. Note that in this survey the implementation of Japanese-language education was newly confirmed in Zimbabwe and Mozambique, and we also learned that it has been resumed in Uganda. The percentages of the number of learners by educational stage are primary education, 14.4%; secondary education, 40.9%; higher education, 26.1%; and non-school education, 18.6%.

Table 2-12-1 Number of institutions, number of teachers, and number of learners in Africa

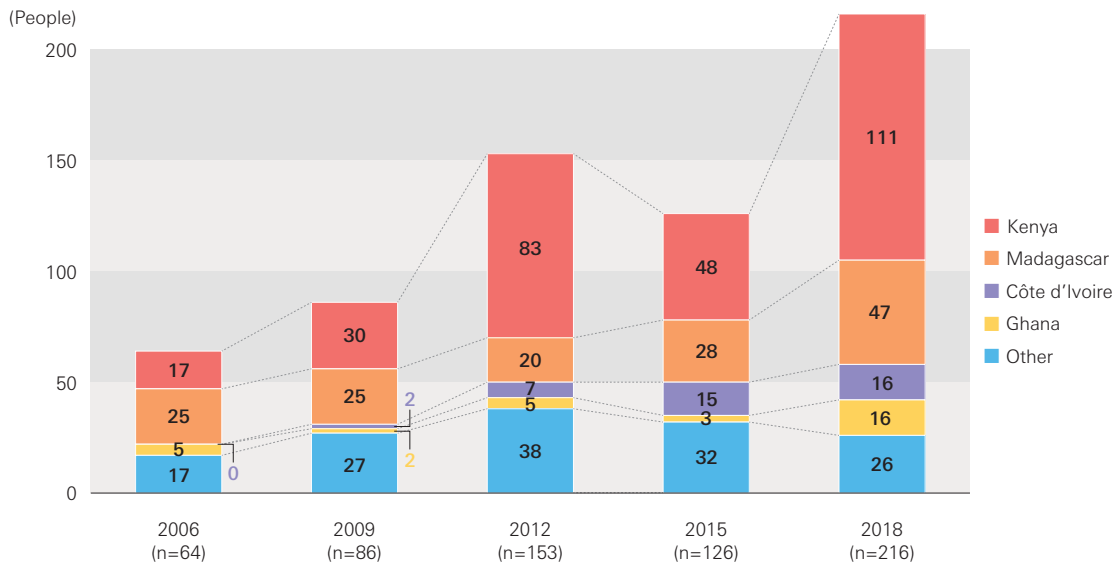
| Country and region | 2015 | | | 2018 | | | | | | | | Population* (People) |
|----------------------------------|-----------------------------|-------------------|-------------------|-----------------------------|-------------------|-------------------|--|--|---------------------|------------------|----------------------|----------------------|
| | Institutions (Institutions) | Teachers (People) | Learners (People) | Institutions (Institutions) | Teachers (People) | Learners (People) | Learners per 100,000 population (People) | Composition by educational stage (learners) (People) | | | | |
| | | | | | | | | Primary education | Secondary education | Higher education | Non-school education | |
| Côte d'Ivoire | 7 | 15 | 2,662 | 11 | 16 | 3,392 | 15.3 | 382 | 2,626 | 341 | 43 | 22,224,509 |
| Kenya | 31 | 48 | 1,107 | 43 | 111 | 2,573 | 6.7 | 375 | 1,268 | 709 | 221 | 38,610,097 |
| Madagascar | 15 | 28 | 1,537 | 20 | 47 | 2,532 | 20.7 | 46 | 296 | 1,180 | 1,010 | 12,238,914 |
| Ghana | 3 | 3 | 755 | 7 | 16 | 939 | 3.8 | 750 | 100 | 59 | 30 | 24,658,823 |
| Cameroon | 3 | 6 | 140 | 2 | 5 | 380 | 2.2 | 0 | 30 | 0 | 350 | 17,052,134 |
| Benin | 1 | 1 | 122 | 1 | 2 | 225 | 2.2 | 0 | 0 | 0 | 225 | 10,008,749 |
| Ethiopia | 2 | 6 | 505 | 2 | 5 | 190 | 0.3 | 0 | 0 | 190 | 0 | 73,750,932 |
| Zambia | 1 | 4 | 20 | 1 | 2 | 155 | 1.2 | 0 | 100 | 45 | 10 | 12,526,314 |
| Senegal | 2 | 2 | 155 | 1 | 1 | 128 | 1.0 | 0 | 0 | 128 | 0 | 13,357,492 |
| Tanzania | 1 | 1 | 14 | 1 | 1 | 108 | 0.2 | 0 | 0 | 108 | 0 | 44,928,923 |
| Mozambique | - | - | - | 1 | 1 | 82 | 0.3 | 0 | 0 | 38 | 44 | 28,861,863 |
| Uganda | - | - | - | 2 | 2 | 35 | 0.1 | 0 | 0 | 20 | 15 | 34,634,650 |
| Democratic Republic of the Congo | 1 | 9 | 28 | 1 | 5 | 30 | 0.1 | 0 | 0 | 0 | 30 | 29,916,800 |
| South Africa | 1 | 3 | 47 | 1 | 1 | 20 | 0.0 | 0 | 0 | 0 | 20 | 51,770,560 |
| Zimbabwe | - | - | - | 1 | 1 | 15 | 0.1 | 0 | 0 | 0 | 15 | 13,061,239 |
| Africa total | 68 | 126 | 7,092 | 95 | 216 | 10,804 | 2.5 | 1,553 | 4,420 | 2,818 | 2,013 | 427,601,999 |

Source: Population and Vital Statistics Report 2019, by United Nations

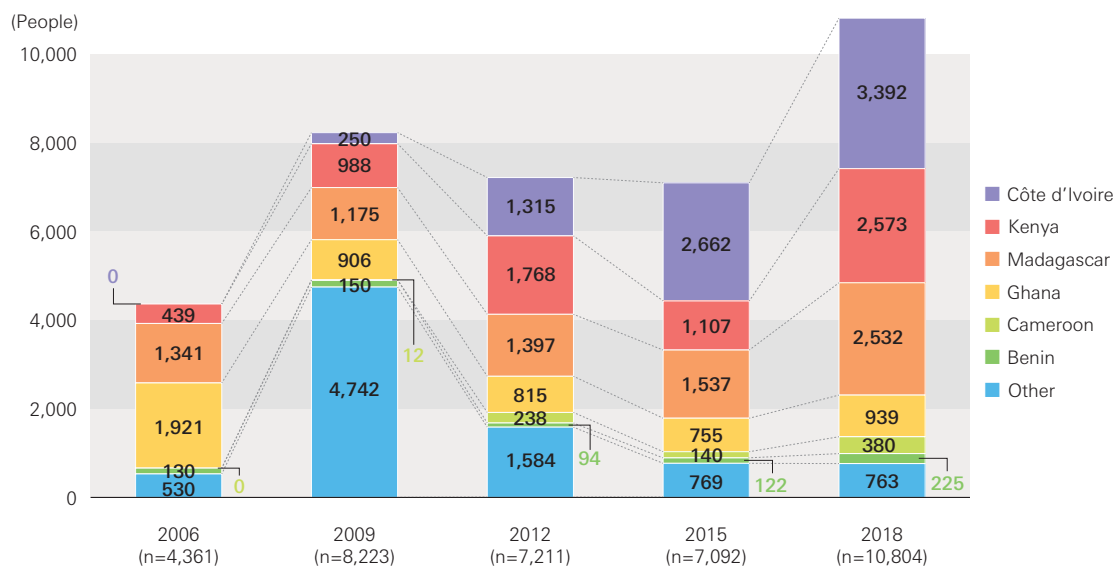
Graph 2-I2-1 Number of Institutions in Africa



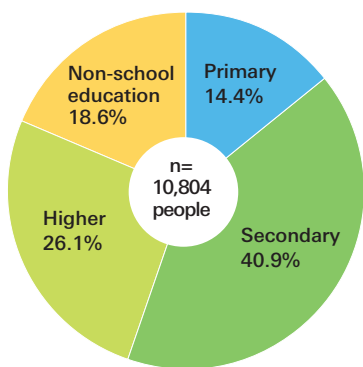
Graph 2-I2-2 Number of Teachers in Africa



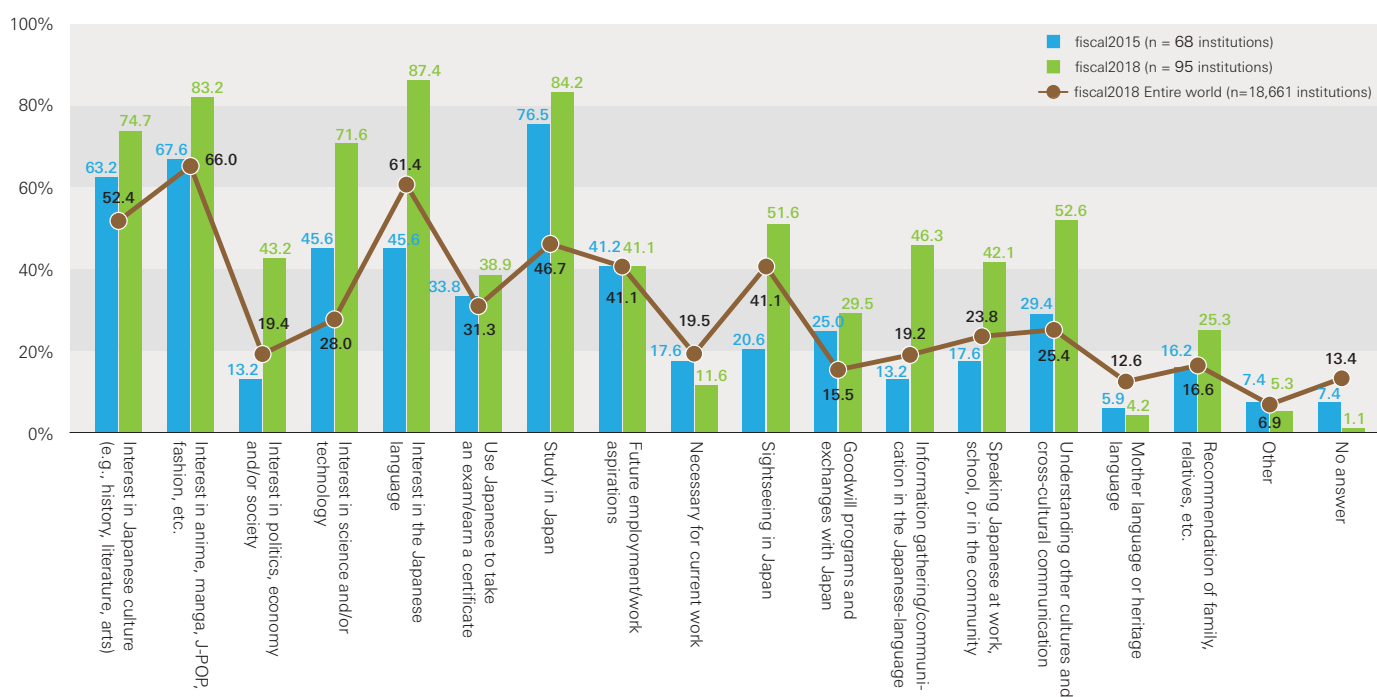
Graph 2-I2-3 Number of Learners in Africa



Graph 2-12-4 Percentages of learners by educational stage in Africa



Graph 2-12-5 Objectives of Japanese-language learning in Africa



Trends in each country

[Kenya]

In Kenya, which has the greatest number of institutions and number of teachers in Africa, the number of institutions, the number of teachers, and the number of learners all recorded large increases compared to the previous survey. We have been able to newly confirm institutions based in regional cities that offer visiting classes, and an additional reason for these results is that there were universities newly offering Japanese-language courses in higher education as well. Kenya is one of the African countries in which the number of learners has increased the most, partly due to the background that a certain number of Japanese people live in Kenya, there is demand for the Japanese language in the tourism industry, a major industry in Kenya, and Japan is a major donor country for Kenya, etc.

[Côte d'Ivoire]

In Côte d'Ivoire, which has the greatest number of learners, the number of institutions, the number of teachers, and the number of learners have all increased since the previous survey. Nearly 80% of the number of learners in this country are pupils studying the Japanese language in their extra-curricular activities in secondary education, but private schools newly offering Japanese-language classes have been confirmed. On the other hand, in higher education, the number of teachers and the number of learners decreased, and this was affected by the fact that we were no longer able to confirm the implementation of Japanese-language education in science and engineering institutions that were offering Japanese-language courses until the previous survey.

In non-school education, the number of institutions and the number of learners increased, while on the other hand the number of teachers decreased. In this category, Ivorian teachers with experience of living in Japan as former state-subsidized international students or trainees are offering introductory and beginner's level Japanese-language classes in major cities.

There are almost no teachers with Japanese-language as their mother tongue in this country; furthermore, the small number of teachers relative to the number of learners is an issue, just as in the previous survey.

[Madagascar]

The results were similar in Madagascar, too, where the number of institutions, the number of teachers, and the

number of learners all increased. In this country, the percentages of learners in higher education and non-school education are about half each, but the number of learners in higher education is the greatest in Africa. By educational stage, the number of learners in non-school education grew in particular, and this was affected by the increase in the number of learners taking the regular travelling classes by JICA volunteers. Many of the people taking the classes live in rural areas, and for people for whom studying language at urban schools is difficult these are valuable opportunities enabling them to experience the Japanese language.

Furthermore, in higher education as well, the number of learners has increased, but going forward there are plans to establish new Japanese–Malagasy courses in domestic universities, so learners are expected to continue to increase going forward.

[Ghana]

Regarding Ghana, which has the largest scale of Japanese-language education after the aforementioned 3 countries, the results are that the number of institutions, the number of teachers, and the number of learners are higher than in the previous survey. The number of institutions establishing Japanese-language courses and the number of learners are increasing, centered on higher educational institutions, and Japanese-language education has started in a series of domestic universities, etc. after the fiscal2015 survey. An environment for Japanese-language education is being established. For example, in 2018 the Japanese-Language Proficiency Test (JLPT) was implemented in the capital Accra; furthermore, in the same year the Japanese-language Teachers' Association was established.

[Other countries and regions]

In this survey, implementation of Japanese-language education was newly confirmed in Zimbabwe and Mozambique. In the former country it is private-sector language classes and in the latter country JICA volunteers are implementing Japanese-language courses in universities in the capital Maputo. Furthermore, in Uganda, where implementation of Japanese-language education had not been confirmed since the fiscal2012 survey, we learned that classes in the Japanese-language are being implemented in vocational training school and also in cram school run by a non-governmental organization (NGO), for children who have lost one or both parents to HIV/AIDS, etc.