

Market Competition, Demographic Change, and Educational Reform: The Problems Confronting Japan's Private Universities in a Period of Contraction

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1. Introduction

East Asia is one of the regions where public-private dynamics in higher education is changing most rapidly. As Altbach (2004) points out, private higher education in East Asia is unusual in the extent of the power it has in the higher education system as a whole in terms of both student numbers and prestige. Some private universities in Japan, South Korea, and the Philippines for example, have longer histories than major public universities and can compete in terms of quality even with top public universities. In this sense the relationship between public and private sectors in higher education is not a new topic for many countries in East Asia; focus on the relationship has recently become heightened because of a number of important structural changes that appear to be developing across East Asian higher education in general.

First, private higher education is still growing. In addition to countries which already have higher education systems dominated by private sectors (South Korea, Japan, Taiwan, and Philippines), the private sector is currently developing very quickly in Thailand and Indonesia. In the mid-1990s, Malaysia officially authorised private higher education, and transitional economies such as China and Vietnam have also begun to follow this trend.

Secondly, several countries have begun to introduce what might be termed 'corporate-style management' into their public higher education sectors. From the beginning of the 1990s, public universities in China gained corporate status. Some Indonesian, Malaysian, and Thai public institutions were also 'incorporated' and given greater flexibility in their governance and control over their finance around 2000; Japanese national universities were incorporated from 2004. Definitions of 'incorporation' are slightly different in different systems, but they all share the common ideas that public higher education should take more control over its governance, be independent from government, and that public financial support to institutions should be on a more contractual basis.¹ These incorporated public institutions are increasingly becoming reliant on income from the private sector; through providing educational services for tuition payments, or setting up their own income-generating business operations for example.

Thirdly, foreign higher education providers are increasingly operating offshore programmes in East Asian countries, sometime setting up branch campuses and working through partner institutions. Laos for example, has only three national universities but two foreign higher education colleges. In Malaysia and Singapore, some foreign branches and joint programmes have been set up through the invitation of the respective governments which want to establish themselves at the centre of regional higher education 'hubs'. China has allowed the operation of foreign higher education programmes if they are set up as joint ventures with local partners. In 2004, the Japanese government also started to recognise foreign universities established in Japan although in reality such institutions have already existed for 25 years.

Fourthly, for-profit higher education programmes are expanding. The Philippines has a long history of allowing for-profit private higher education, and Malaysia does not make a distinction between for-profit and non-profit in the legal treatment of its higher education institutions. Japan had previously not permitted for-profit universities and colleges, but from 2004 began to allow them in special districts under the government's deregulation programme.

Finally, the increasing importance of the market and market competition in higher education in the region can be seen in almost every aspect of the system. Most countries continue to experience increasing demand for higher education and the weakening barrier both between

1 Singapore Management University, established as a 'publicly funded private university', can also be seen as an example of the introduction of a corporate management system into a public higher education system.

public and private domestic institutions, and between domestic and foreign higher education institutions, have led to their higher education sectors becoming increasingly competitive. The level of competition is particularly high in Japan and South Korea both of which face a serious over-supply of higher education provision, due to a combination of deregulation policies which has allowed the establishment of more institutions at the same time the number of graduates has shrunk dramatically due to falling birth-rates over the past three decades.

In short, the relationship between the public and the private sectors in higher education across East Asia is in a particularly volatile state due to the increase in the size of the private sector, the introduction of corporate style management into the public sector, and the recognition of for-profit higher education. In Japan and South Korea, this volatility has been exacerbated by the fact that they have been experiencing deregulation of their higher education systems while their main potential market for students has been shrinking. In the case of all these countries, these conditions beg the interesting question of how, under market principles, can a higher education system protect and improve the optimum public and private interest. This paper will begin to explore this question and concentrates on Japan – the oldest and most developed privately-dominated higher education system in East Asia. It will suggest that the changing dynamic between the public and private sectors of higher education in Japan may well have ramifications for other countries in East Asia, if not globally.

2. How does Japan's private higher education system fit into global typologies of private higher education?

Perhaps the two best known typologies of private higher education are those of Levy (1986) and Geiger (1986). Based mainly on a study of Latin American systems, Levy developed a typology of private higher education institutions that included religious institutions, secular elite institutions, and demand absorbing institutions. Geiger based his comparative study of the public-private relationship of higher education in North America, Europe, and East Asia; and developed a typology of higher education institutions specifically for understanding the complex American system. Geiger's categories included private research universities, liberal arts colleges, and urban service universities. Levy's 'demand absorbing' institutions and Geiger's 'urban service' universities appear to have a great deal in common with Japan's private universities in terms

of development based on the social demand for mass higher education, and their tendency to be located in large city areas where high demand is most pronounced.

Levy also developed a typology according to the relationship between public and private institutions in different societies, describing these for example, as 'homogeneous' (Chile), 'dichotomously distinctive' (Mexico), and 'qualified distinctive' (Brazil). Within this typology, Japan would be categorised as a type of 'qualified distinctive' higher education. In Japan, only a relatively small public subsidy (currently around 10% of its running costs) is given to the private sector, which by this dimension clearly distinguishes it from the public sector (which currently receives around 80% of its costs from the state). Geiger in turn, categorised countries into 'mass private' (Philippines), 'parallel public and private' (Belgium, Netherlands), and 'peripheral private' (France, Sweden, UK). Japan's system – where 75% of university institutions are private, attended by almost 80% of the total student body – is clearly one of 'mass private' higher education.

Typologies are helpful but by their nature static; to fully understand the current system of Japanese private higher education and how it might change in the future, it is necessary to have some knowledge of its diverse origins and development over the past 130 years. As Kaneko (1997) describes, in the 1880s there were many political leaders outside the new Meiji restoration government as well as entrepreneurs who supported the establishment of non-governmental higher education institutions. Some universities were started by intellectuals who had direct experience of the western world; others by expert groups such as medical doctors or engineers; others relied on networks of retired and current academics in the public higher education sectors. None of these institutions were however, immediately recognised by the Japanese government. Indeed, it was only when the demand for higher education graduates in the private industrial sector expanded in the 1920s – combined with the emergence of parliament-based cabinets and a wider electorate (Itoh 1999) – that the government finally officially recognised the existence of a private sector of higher education.

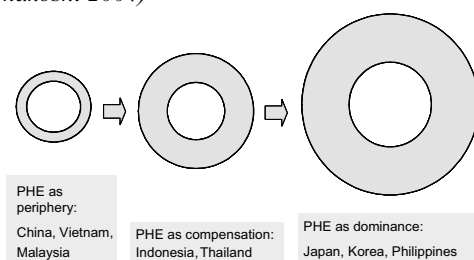
The 1960s saw the Japanese private sector taking on the clear characteristics of the 'demand-absorbing' mass higher education system. With only limited resources at its disposal to rebuild the country from the wreckage of World War II, the Japanese government could not establish a public mass higher education as the US did in the 1950s and 1960s. Instead, public resources were intensively invested in a limited number of students in the public sector, so that by the 1970s almost all Japanese students began to stay on in the education system until the age

of eighteen and the private sector absorbed the surplus demand for access to higher education.

Umakoshi (2004) has pointed out a positive correlation between the general expansion of higher education systems and an increasing share of students admitted to the private sector in East Asia. Most East Asian countries which developed mass private higher education sectors such as Japan, Korea, and the Philippines, developed a system where demand-absorbing private institutions came to dominate the number of university places and where only a small minority of students attended public higher education. In developing his argument, Umakoshi refers to Cummings' (1997) 'J-model' in which East Asian countries are described as following the Japanese model, just like 'flying geese' in their transition from private-peripheral type to private-dominant types of higher education systems. In reality however, the current public-private dynamics in East Asian countries as outlined in the introductory part of this article, are much more complex than Umakoshi's model suggests.

Umakoshi's model is based on two basic assumptions: (1) public and private higher education are clearly distinct from each other; and (2) the higher education systems of these countries go through the same pattern of 'private higher education as a peripheral system', 'private higher education as a compensatory system' and then, 'private higher education as a dominant system' as the overall system develops into one of mass higher education. It is quite clear however, that many Asian countries are experiencing the disappearance of a clear distinction between public and private higher education. Currently, as we have seen, most of the public higher education institutions in the region are introducing corporate-style management under titles such as 'incorporation', 'corporatisation' or 'autonomisation', and increasing the 'privatised' elements of their operations. Especially in China, public institutions own affiliated 'independent' colleges, which charge full cost tuition fees and sometimes earn profits. It is far from clear that East Asian countries are all following the rather simple kind of transitional model that Umakoshi suggests. Indeed in the case of Japan and Korea we can expect to see the *contraction* of the private sectors of their higher education systems due to the shrinking number of secondary school graduates and the fact that already more than 70% of high school graduates continue on to higher or post-secondary education. Significant numbers of less prestigious private higher education institutions in both countries are facing the prospect of closing over the next few years.

Figure 1: Transitional model of private-sector types. The shaded areas represent private sectors; the cores represent public sectors (Umakoshi 2004)



Both of Umakoshi's assumptions therefore, need closer examination in the light of recent developments in Japan. As shown in Table 1, Japanese higher education has three sectors; national institutions are funded by national government and from 2004 have had public corporation status as 'national university corporations' or 'independent administrative corporations'; local-public universities institutions are funded and operated by local governments (prefectures or cities) and are currently in the transitional process from direct operation by local government to 'local-public university corporations';² and private institutions are operated by non-profit organisations called 'School Corporations'. These private institutions receive around 10% of their running costs from the government through the Promotion and Mutual Aid Corporation for Private Schools of Japan but otherwise are financially independent.³ Let us look first at the relationship between the public and private higher education sectors and then at the effects of the contraction of the private sector as supply begins to exceed demand.

2 For the purposes of this article, at points both national and local-public institutions are included in the term 'public'.

3 Since 2004, a tiny number of private universities have operated as for-profit stock companies within so-called Special Districts for Administrative Reform as pilot cases of deregulation.

Table 1: Institutions and Students in Higher Education in Japan (2006)

	Total	National	Local Public	Private
<i>Institutions</i>				
Universities	744	87	89	568
Junior colleges	468	8	40	420
Colleges of technology	64	55	6	3
Specialised training colleges (tertiary programs)	2.996	11	194	2.791
<i>Students</i>				
Universities	2.859.212	628.947	127.872	2.102.393
Junior colleges	202.254	597	11.909	189.748
Colleges of technology	59.380	52.587	4.493	2.300
Specialised training colleges (tertiary programs)	667.188	668	27.425	639.095

Source: MEXT 2006

3. The increasingly complex relationship between the public and private sectors in Japanese higher education

Ichikawa (2000) is amongst those who have identified a move towards an increasingly unclear division between national, regional, and private sectors in the rapidly-changing picture that we have described in some detail above, and sees this as evidence of the recent emergence of 'borderless' structures in the higher education system. As we show in this section, the relationship between the sectors actually has been becoming increasingly complex over the past four decades.

The basic aims of Japanese higher education policies until the mid-1970s were to ensure higher education graduates and equality of access to higher education with the lowest commitment of public funds possible. The policies for this very difficult task were largely based around a clear distinction of the function of the private and public sectors. The focus of the public sector was on training the human resources required for national development and implementing university-based research activities. Both of these aims were regarded as essential for the economic

development of the country (Amano 1986). At the same time, the existence of the private higher education sector ensured equality of access by absorbing the demand for higher education as a by-product of the realisation of universal attendance in secondary education. Umakoshi's (2004) argument suggests that this policy was a typical model in Asian countries. In general, private institutions in Japan have large educational programmes in the social sciences such as law, economics, and business. The tuition fees of these courses have been set relatively low in order to compete with public sector institutions, and teaching classes are large in order to keep fees reasonably inexpensive (Yonezawa and Baba 1998).⁴

However, in the context of broader welfare state policies that developed more generally in the country in the 1970s, Japanese private higher education institutions began to receive public money for the first time. At the same time however, the numbers of students in such institutions became strictly controlled under a national higher education plan. This in effect brought the public and private sectors closer together and is a trend which continued for example, when local government also started to become more actively involved in the higher education sector. Especially in rural regions, local governments from the 1970s began to demand the establishment of more higher education institutions within their areas, both to provide access for local high school graduates but also to retain members of the younger generation within their local communities which were becoming rapidly depopulated as young people migrated to the cities. The number of local public institutions increased considerably during the 1980s and 1990s. The problem for these institutions however, has been that local governments in general are under higher pressure from taxpayers than national ones, and local public universities and other higher education institutions were not protected by bureaucrats from the Ministry of Education. As a result, the idea of new public management in public universities began to become increasingly

4 Urata (1998), using data from 1996, identifies an overlapping hierarchy of public and private universities in his analysis of how private universities set their tuition fees. One of the interesting features of the fee structure of private universities in Japan has been that the lower the level, the higher the fees and the worse the student: staff ratio. This otherwise counterintuitive feature is due to what economists call the 'law of inelastic demand', i.e., the less options left to the individual as he goes down the system, the higher the cost. These fee levels can also be directly correlated with the salaries of professors; those in lower level universities are today generally paid more than those in higher level ones. Yano and Maruyama (1988) suggest that the salary of teaching staff in private universities rose rapidly from the 1960s as the system expanded, and already exceeded that in national universities by around 1980.

popular and many outsourced their services to private companies from the 1990s.

As Osumi (1999) points out, the Japanese style of 'new public management' follows British and New Zealand models, having the characteristics of being 'top down', 'comprehensive' and 'radical', in comparison with the more 'bottom-up', 'ad-hoc' and 'modest' Northern European (Finland, Denmark, and Sweden) and American models. As a result, 'new public management' in Japan focuses on the active encouragement of market mechanisms and the maximum privatisation of public services.

On the other hand, private higher education institutions in Japan have been operated by School Corporations (Gakkō Hōjin), special non-profit legal entities set up for public purposes. In general, public support for local private institutions has been regarded as an effective policy for increasing the opportunity for access within the local community. At the same time, local governments can participate in or even control the governing boards of those publicly-supported private higher education institutions.

It is important to understand that Japanese higher education already faced a period of contraction at the beginning of 1970s, when the first baby boomer generation finished their higher education. Many of the new private institutions that had been established in rural areas started at that time to rely on financial support from local communities because they could not get enough students to support themselves through fees. In many cases, senior members of local communities became members of the governing boards of those private institutions. As a further example of this trend, in the 1980s many newly-founded private higher education institutions received facilities and property from local public governments. Some local governments these days indeed provide all facilities of local private universities, send administrative staff to operate the institutions with their salaries covered by public funds, and appoint members to their governing boards. This type of public involvement in setting up new institutions was initially categorised as a 'public-private cooperation model'. In the 1990s, a 'publicly founded-privately operated model' was developed in cases where the local government provided the initial facilities as well as almost all of the administration.

The domination of a neo-liberal ideology and its replacement of welfare state policy became clear in the 1980s, and the national government set strict budgetary ceilings aiming at developing what became known as 'small government'. These neo-liberal trends further weakened the boundary between the public and private sectors although opposite of what had happened under the welfare state policies. Those who believed

in the importance of market forces advocated equal competition among national, local-public, and private sectors.

Discussion about 'equality' between the public and private higher education sectors in Japan first appeared in the 1970s and has been one of the most important themes in debates about higher education reform ever since. In 1975, the cost of tuition at national and local institutions was negligible while average tuitions fees in the private sector were 4.3 times higher than those in the public sector (the gap in medical studies was much larger). The fact that the majority of higher education students were 'forced' to study in private institutions – because of the limitation on places provided by the public sector – led to the rise of tuition fees in public institutions as a means of 'equalising' educational expenditure between the public and private sectors. Since the 1970s, the tuition fees of public institutions have continuously gone up faster than private ones, in part because of moves towards equalisation but also because of increasing government budgetary stringency. According to MEXT data, the tuition fee gap between public and private institutions in 2004 was reduced to 1:1.6.⁵

The strict control of student numbers which had been brought in under the higher education plan was deregulated in 1986 when the second baby boomer generation started to enter tertiary education. Even after passing this generation through the system, the government continued to loosen the regulation of student numbers. Amano (1997) has described this policy change as a move from a 'planning' to a 'market' model.

In place of central planning, the Japanese government gradually started to strengthen the higher education quality assurance system. In 1991, the Ministry required universities to 'make efforts' at self-monitoring and self-evaluation to improve the quality of their education and research activities. In 2000 an evaluation organisation funded by the government, the National Institution for Academic Degrees and University Evaluation (NIAD-UE), started a pilot project for the evaluation of national universities. From 2004, accreditation which needed to be granted every seven years became compulsory for all national, local-

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- 5 Kaneko (1989) argued that social science majors in national universities were already paying full cost in national universities by the end of the 1980s. Yonezawa and Yoshida (2001) analysed time series data of expenditure per student and the student: staff ratio in economics and engineering for example, over twenty years (1975-95), and indicated that the gap of unit cost drastically diminished during that period and the unit cost in social science majors became almost equal between national and private universities. They also suggested that the rise in expenditure per student was not necessarily accompanied by the staff/student ratio in the private sector.

public and private universities, junior colleges, and colleges of technology. MEXT was granted powers to ensure the improvement of conditions in individual higher education institutions, adding to the powers it already had to close illegally operated institutions. Interestingly, these new quality assurance mechanisms have not slowed down the increase of higher education programmes in either the private and local-public sector so far.⁶

While there remains a nominal distinction between national, public, and private universities in Japan, the above account suggests this distinction has become increasingly blurred over the past forty years. So much so indeed, that the national and public universities are far from immune to the threats we describe in the next sections that currently face the private institutions in Japan.

4. The Current Threat Faced by Private Universities in Japan

As long ago as 1986, Geiger, using data from 1980, demonstrated that in terms of their entry requirements there was an overlapping hierarchy in which some private universities were better than some public universities. The fact remains however, that in this 'overlapping hierarchy', some private universities can compete with the best national ones, while all of the least-regarded institutions are private and it is these which face the biggest challenge over the next few years as the market for traditional entry-age students contracts. A whole spate of books have appeared in recent years which reflect this situation with titles such as Furusawa's 2001 *Daigaku Survival* (University Survival); Satō's 2001 *Daigaku no Ikinokori Senryaku* (Universities' Strategies for Survival); Yomiuri Shinbun Osaka Honsha's 2002 *Tsubureru Daigaku; Tsuburenai Daigaku* (Universities which will go Bankrupt and those which will not). Put simply, these books agree that a large number of the current private universities will disappear in the next few years. They differ only in their predictions of exactly *how many* universities will disappear (from a low of 15% to a high of 40%) and *which* institutions.

To a large extent, the problems that private universities now face are directly related to the reasons for their expansion in numbers from the end of the 1980s. Two factors particularly influenced the growth of pri-

6 The number of undergraduate students in national universities has decreased since 1993, but this is due to changes in national planning and the recent mergers of a number of institutions and cannot be directly related to the new quality assurance systems.

vate higher education during that decade. First, government legislation for equal legal treatment between male and female workers in 1986 stimulated the entry of female students into four-year higher education. This led to the growth in the female undergraduate market and the shrinking of the female junior college market. Many junior colleges could no longer fill the quota of places allocated by the national government: by 2000, almost 60% of junior colleges were under quota. A significant number of junior colleges tried to upgrade themselves into four-year universities and colleges, and the national government had to allow them to do this to prevent them from going bankrupt.⁷

Secondly, the neo-liberal ideology itself had a huge influence on governmental policy. Almost all forms of 'regulation' became targets for reform, and higher education was no exception. The regulation of student numbers was dramatically weakened. This largely explains why during 1992-2004, the number of four-year universities increased by an even faster rate than the decrease in the eighteen-year-old population. In 1992 there were 98 national, 41 public, and 384 private four-year universities in Japan; in April 2004, there were 88 national, 77 public, and 545 private four-year institutions- an overall increase of 31.9%. The beginning of this period coincided almost exactly with the peak in the number of eighteen-year-olds (the group who provide well over 90% of all university entrants) in the Japanese population. This generation, the second post-war baby boom, peaked at 2,050,000 in 1991 and then began a steady decline (31.2%) to around 1,410,000 in 2004. Due to the rapidly decreasing birth-rate in Japan since the late 1980s, there is no third baby boom on the horizon and the number of eighteen-year-olds will continue to decline to 1,183,000 in 2012 (an overall decrease of 42.3% over twenty years). By the end of the 1990s the Japanese higher education market had experienced a dramatic shift from market conditions of over-demand to over-supply. The total supply of the student places in four-year universities became nearly equal to the total demand in 2007.

Many private universities which enjoyed a huge number of applicants in the early 1990s have seen that number dwindle by as much as

7 In 1992, with 541 institutions (88% of them private) Junior Colleges (*tanki daigaku*) constituted over 44% of all of Japan's tertiary-level institutions and catered to nearly 23% of all tertiary-level students (around 92% of their in-take being female); by 2004 they catered to only 9.6% of all university students, as more and more women entered higher status four-year institutions. To survive financially, close to fifty junior colleges converted to four-year universities (and many others were absorbed into their attached four-year institutions) during the decade after 1992.

90% so that now they no longer attract even enough to fill the available places. As many as 30% of all universities now find themselves with some faculties in that situation and many of these (especially in private universities where fees account for over 80% of total income) are facing the possibility of financial collapse.⁸

5. Attempts by Private Universities to Find New Markets and Income Streams

Japan faced a contraction of its higher education system in the 1970s as the first post-war baby boom generation left the system. This potential contraction was much more than made up for by the huge increase in those staying on to the end of secondary education and demanding places in the tertiary system. A better comparison for the present situation in Japan therefore might be with the US system at the end of the 1970s when, as Kelly (1999) points out, there were many dire warnings of university collapse remarkably similar to some of the current warnings about Japanese private higher education today. During the 1970s, US colleges had 16% fewer eighteen-year-olds to draw upon and between 1979 and 1992 it was calculated it would face a further 25% reduction – a total reduction of around 40% over two decades which, as Kelly (1999, p. 41) states, almost exactly mirrors the current Japanese case. Instead of the higher education system contracting in the 1970s and the 1980s in the US however, it went up by around 36%; two year colleges, which had been expected to disappear, did even better.

One of the main reasons for this was the development of a number of new markets that dramatically expanded their student base. Private universities in particular in Japan have also recognised their need to diversify away from what has been their traditional entrant: the eighteen- or nineteen-year-old Japanese student who has entered either directly from high school or a year later after a period at a full-time cram school (*yobikō*). For various reasons however, the outcomes of these new initiatives do not look as promising in Japan as they were in the US.

One recognised area for growth is the development of graduate education. Only about 8% of Japanese students currently go on to graduate education, as opposed to 13% in the UK and 16% in the US. One report from the early 1990s put Japan as second among industrialised nations

8 For recent detailed analyses of the financial situation and viability of private universities in Japan, see Maruyama (2002); Nakamura (2002); Shimano (2004).

in the percentage of its college-age youth going to university and last in the proportion going on to graduate school (*Daily Yomiuri Newspaper*, 19 Feb. 1991). In part this has been thought to be due to the reluctance of Japanese employers to hire those they feel already so qualified that they will be difficult to train in their own company way of doing things (Urata 1996, p. 189-90). Ogawa (1999) explains that graduate education in Japan has generally been seen only as a training ground for those who want to go on to be academics and that there has been little use of it for gaining professional and other non-academic skills. The UK Dearing Committee (Dearing Report 1997, p. 55) was told that the Japanese Ministry of Education planned to increase the number of graduate students by 33% between 1995-2000, mainly in science and technology. In part this reflected the fact that, as Teichler (1997, pp. 286-287, 293) points out, major Japanese production companies changed their recruitment policies in the early 1990s in favour of increasing science and engineering graduates from Master's programmes. This largely explains the doubling in the number of graduate students from the mid-1980s to the mid-1990s. While the number of undergraduate students in engineering and the natural sciences going on to graduate courses rose to almost one-quarter and one-third respectively by the mid-1990s, in the social sciences it remained around 3% where graduate study was still not seen as having employment value other than for those who wanted to be academics. Unfortunately for the lower level private universities, they have invested very heavily in the social sciences which were cheap to run and could accommodate large classes, and so the increased demand (from students and employers) for graduate education in science and engineering has had minimal effect for them.

There has however, been the initial development in the last few years of non-science-based professional schools. Over 70 universities opened Law Schools on April 1 2004, as part of the process of radically reforming the training of – and increasing the number of – lawyers in Japan. At the same time, there has been the development of MBA (Master of Business Administration) courses (Yamada, 2002). These programmes are having the effect of bringing a small number of *shakaijin*

gakusei (mature students)⁹ into universities. Most of these students however, are taking courses in the evening and weekends so that they can combine them with their jobs; there is as yet almost no evidence of students taking career development breaks and even less of housewives coming back to university once their children are old enough to go to school. Significantly, these were both huge new markets for universities and community colleges in the US in the 1970s when they were facing the same drop in 18-year-olds as currently faced in Japan (Kelly 1998). In the 1990s however, employees were very reluctant to return to full-time university education because of fears about getting new jobs as the economy slipped into recession. For housewives there were not only well-established systems for very cheap adult education at local Cultural Halls but also no evidence that employers would recognise their new qualifications if they went back to university after child-care breaks. On the university side, establishing graduate courses is an expensive proposition; there are strict minimum requirements for staff: student ratios much tougher than for undergraduate programmes. The number of non-science graduate students will need to increase much more therefore, before they become a significant means for universities to increase their income.

Another source of possible students has been those from foreign (known as *ryūgakusei* in Japanese). This again has constituted a huge source of university income in Anglophone countries such as the UK, US, and Australia over the past decade. In 2003, Japan reached the target of 100,000 foreign students enrolled (26% at graduate schools; 53% on undergraduate programmes; 19% at vocational schools) that had been set by then-Prime Minister Nakasone in 1984. Much of this rise came about in the previous five years when the numbers doubled from 51,000 to almost 110,000 as a result of the easing of immigration requirements for foreign students in 1997 and the rapidly growing demand for higher education in China and South Korea. Within 117,927 foreign students in 2005, nearly 63.0% come from China and 13.5% from South Korea. If one excludes the further 3.6% who come from Taiwan, the rest of the world contributes a mere 23,450 foreign students to the second largest higher education system in the world. Foreign students are very concen-

9 There does not seem to yet be an official definition of who falls into the category of a mature student in Japan. Universities which operate special entrance categories for '*shakaijin gakusei*' seem to have their own definitions, though most of these seem to include the idea that the candidate either has a paid job, or has had a paid job previously, while not receiving full-time education. The fact that definitions are so custom-made is a good indication of how undeveloped this market remains.

trated in the metropolises with more than 30% in Tokyo. This means that rural universities, which are most under financial threat, have found it difficult to recruit them as a mean of easing their financial situation.¹⁰ Even in urban areas, though, it is generally agreed that programmes for foreign students are more closely related to the image and public relations of universities than their finances. Many such programmes indeed run at a loss, and their financial situation was considerably worsened in the academic year starting in April 2004, which saw a severe reduction in the number of visas granted to students from China by the immigration authorities, in light of a number of very serious crimes committed by a very small number of such students in the previous year. As far as foreign students are concerned, there is not yet sufficient evidence to suggest that Japan is as good an investment of family income as the Anglophone countries and while numbers are creeping up the overall effect of this new market on the system as a whole, and the lower-level private university sector in particular, is likely to remain minimal for some time.

Japanese private universities have relied almost entirely on student fees (around 80% of their total income; in the form of entrance exam, entrance, tuition, and other fees) and (central or local) government subsidies (around 10% of their current income on average). If neither mature nor foreign students offer an immediate means of bringing more income into most universities, then what other means are available? There are three revenue-generating offices which one has found on most US and UK university campuses since the 1980s and which are only just beginning to appear in Japan: research offices, conference offices, and continuing education offices. As is well known, a far higher proportion of Japanese R&D is carried out in companies than in university laboratories, and Japanese companies have generally favoured foreign universities to do research for them. Spin-off companies however, have recently been set up in a number of universities. This is expected, at least in the short-term, only to be a source of significant income for a few major universities with strong medical, engineering, and natural science departments. Again, because of their investment in the social sciences and humanities, it is unlikely that many lower-level private universities will be able to earn substantial income through research contracts.

10 One university in Tohoku set up classrooms in Tokyo and taught some of its foreign students there via video-links so that they could combine their studies with part-time jobs in the capital where jobs are much easier to come by than in the countryside. This well-reported case was presented as an example of the widely-held belief that many foreign students in Japan had come not to study but only to look for work and earn money to send back to their families abroad.

Another possible source of income for universities is to make better use of their facilities or to provide services for their local communities. Many of the older universities have campuses in prime situations in the middle of urban areas and many newer ones have superbly developed, designed, and equipped facilities. Most universities however, are still only utilised during the day and in term time. Recently however, some university administrators have been waking up to the revenue-generating possibility of utilising their campuses during the evenings, Sundays, and during vacations; of course, in the current recession, they are trying to sell space in a very competitive market. Similarly – and sometime in conjunction with the above – some institutions are beginning to develop programmes of lectures and classes for members of the public, though here, as mentioned above in the context of luring housewives back to university as full-time students, they face strong competition from courses which have been available for many areas at local cultural centres throughout Japan.

All of the above ideas have been recognised as possibilities for introducing new revenue streams into private universities. None have managed to do so to any substantial degree. A very small number of private universities have come to rely on foreign students but this has proved to be a very unstable market – due to the sensitivity of Japan's relations with its Asian neighbours and a global demand for teaching in English which is not readily available in Japan. Across the sector as a whole it has had minimal effect; virtually no universities have been able to use their facilities to raise substantial income through 'sweating their resources';¹¹ links with industry have been hard to develop because most private universities had developed programmes at the time of their establishment that could be taught with high student: staff ratios and with little investment in infrastructure such as laboratories but which now can deliver little of research interest to commercial enterprises. Instead of trying to attract new markets therefore, many universities have turned their attention to securing a greater share of the traditional market of eighteen-year-olds and trying to deal with the issue of retention as drop-out rates have soared. In doing so, they have been to some extent 'reinventing' the idea of the University in Japan.

11 Naoi and Akabayashi (2004) argue that the inequalities in government subsidies mean that private universities can never compete in selling their facilities with public universities which can always undercut them in this market.

6. Attempts at 'Reinventing' the University

The ability of the national government to directly affect the policies of individual institutions became much more limited with the introduction of the neo-liberal ideology of the 1980s. The strong recommendation to institutions that they set up systems of self-monitoring and self-evaluation during 1990s was a governmental attempt to foster the management capacity of higher education institutions, most of which (especially national, public, and prestigious private universities) did not have strong leadership provided by Presidents and Deans, as we shall see in the next section. The University Council report in 1998 included detailed proposals for quality improvement of university education, such as guidelines of weekly study hours of students, grading and GPA systems, better use of syllabi, faculty development and so on (University Council 1998). The introduction and reinforcement of quality assurance mechanisms and the incorporation of national universities in 2004 should also be understood as a governmental initiative to drive university reform.

Partly as a result of these government initiatives but also largely because of the threat caused to institutions' existence by the lack of students, a much greater emphasis on reforming what exactly universities offer to their students has developed over the past decade (Lee-Cunin 2004). Students are beginning to be seen as consumers or, as Kitamura puts it, Japanese tertiary education is seeing the development of a buyer's market where "students will be 'courted customers' rather than 'supplicants' for admission" (1997, p. 148). During the 1990s, virtually all universities undertook some form of curriculum reform. Previously, under the label of academic freedom and a belief in the specialist nature of academic work, the teaching of academics had been left almost completely up to individuals. They designed their own syllabi, taught their own courses, set exams for their own students, and marked their students' papers; all without external evaluation or reference to colleagues. The result was that while some teaching was excellent, much of it was described as routine and unimaginative and just as seriously, there was no co-ordination between courses within and across departments. A vicious circle developed as students became disillusioned and stopped attending classes and professors decried the lack of student commitment, yet still continued to graduate them on the basis that this was the university's duty after it had accepted them (Usami 2000, for a good description of this process). As the job market for graduates came increasingly tighter during the 1990s, students became more selective of what and not just where they studied (Yano 1997) and more demanding about what they got for their money. Institutions of higher education were under in-

creasing pressure to respond to these new demands (Arimoto 1997, p. 205). Many students indeed dropped out of university altogether or attended vocational schools (*senmongakkō*) alongside or after university to make themselves more attractive to employers. In response to these trends, universities instituted FD (Faculty Development) programmes to try and get their academic staff to think about their teaching (Inoshita 2003).

Many commentators however, feel that FD programmes have not been very successful, in part because of Japanese professors' self-image. According to Ehara (1998a) Japanese professors think of themselves as researchers in the German mould, rather than teachers in the Latin American mould, or as both researchers and teachers in the Anglo-American mould. While it has always been difficult to get a full-time post in a Japanese university, once obtained it has offered both a very high level of security and by global standards for academics, a very good salary. There has historically been little incentive therefore, to reforming teaching practices, which have been unchanged for many decades. Even now that people recognise the imperative, they find it very hard to make the cultural change (Lee-Cunin 2004; McVeigh 2002). In order to bypass such resistance, some universities have introduced new courses, often taught by new teachers, though generally on the same campus, which have a more practical element to them than those taught by their established professors. For example, students studying English may be able to take courses designed for passing TOEFL taught by teachers from a local language school or for those majoring in economics, courses to prepare them for accountancy exams taught by teachers from a local vocational school (*senmongakkō*). Such universities see the need to offer practical training which will improve their students' chances of employment, as employment rates (*shūshoku ritsu*) begin to replace entrance scores (*hensachi*) as the means of ranking universities (Asahi Daigaku Ranking 2004; Yonezawa et al. 2002). Drop-out rates continue to climb however, in most lower-level private universities and overall, attempts at reinventing themselves have proved hardly any more successful for most universities than has the search for new markets. The reason lies mainly in problems of university management.

7. University Management and the Problem of Reform

From the governmental point of view, the reform of management, especially at national universities, has been a core part of its higher education

reform policy. There has long been criticism of the inefficiency of decentralised decision-making power in national universities. The Ministry and its advisory councils have continuously tried to strengthen the leadership of university presidents and their capacity to effect management change (Study Team Concerning the Transformation of National Universities into Independent Administrative Corporations 2002). Through the incorporation of national universities, the long tradition of electing the Presidents of national universities from their own faculty was changed to appointment by a committee, although most national universities still operate an election system which is then implemented by the committee. National universities now have a Board of Directors with decision-making powers and Administrative Councils with external members who can advise on management issues. They need to produce medium-term goals and demonstrate their plans for dealing with personnel management issues such as introducing more contract-based recruitment of academic staff and performance-related payment systems.

The reason the Government has invested so much effort in introducing these management reforms into the national universities is because it has long felt that it was the management structure which was most responsible for universities inability to reform themselves in the facing of changing internal and external threats and challenges. Very much the same can be said for the private universities for whom the immediate need for reform may be even greater.

Put simply, there are two basic management styles in Japanese universities (Nihon Shiritsu Daigaku Renmei 1986, 1999, Oe 2003). One, generally known as the *kyōjukai shihai* (control by the professors' council) model has pertained in all national, public, and many private universities; the other, known as either the *gakuchō-shihai* (control by the president) or the *rijikai-shihai* (control by the school board) model, can only be found in private institutions (Ehara 1998b). As Ushiogi (2002) points out, both styles have problems for the reform of higher education institutions.

While financial decisions are made by the school board, all academic decisions rest with the professors' councils of each faculty in the *kyōjukai shihai* model. As a result, the *kyōjukai* (professors' meetings) have tended to have huge powers of veto over decisions with financial implications for the institution as a whole, without however being responsible for the financial effects of those decisions. Indeed, since the *kyōjukai* has generally operated on the basis that it will only make a decision when a consensus has been formed, according to many informants it has frequently been a negative and reactive rather than a positive and proactive force in the institutional decision-making process.

The *gakuchō-shihai* or the *rijikai-shihai* models are most commonly found in the newer private universities, many of which are family-run concerns passed on from parent to child (or adopted child) over two or three generations. Here, power over both academic and financial matters rests in the hands of an individual or a board made up of close associates of that individual. In some cases this individual is a respected academic in their own right who is fully involved in the day-to-day running of the university and who can balance the academic and financial aspects of their decisions. In many cases however, decisions are made by individuals and boards far removed from the issues they are discussing. As a result, staff often feel not only disempowered but also that decisions are arbitrary, something which those who work in such institutions say can lead to the development of a culture of fear and mistrust. There is no doubt however that with this model, decisions can be implemented much more quickly and hence Monbushō has strengthened the power of the heads of national universities to help them speed up the reform process.

As Hatakenaka (2004) points out in her comparative study of UK, US, and Japanese university management; from an Anglo-American perspective what is conspicuous about the Japanese model is the almost complete lack of academics with management and financial experience. These ‘hybrids’ as she calls them, are responsible for most management decisions in UK and US research universities and have allowed the nearly ubiquitous development of decentralised management where individual departments (or even smaller units) take responsibility for both the academic and the financial management of their own affairs.

8. Conclusion

In Japan, the strong influence of neo-liberalism has led to the ideas of New Public Management, privatisation, and ‘marketisation’ beginning to dominate the policy debate in higher education. These changes in higher education policy without doubt demand a new framework for understanding the relationship between the state and higher education institutions. Figure 3 shows the traditional relationship between the state and higher education institutions in which state governments regulate and guide higher education institutions while the institutions report to the state government. In the typical state evaluation model, external evaluation organisations intervene or act as a ‘buffer’ between the two actors.

Figure 4 shows the relationship between state government and higher education institutions through the market. The higher education market tends to be highly segmented as indeed is typically observed

with Japan’s private higher education sector. In most cases, the state government maintains a direct means to guide and regulate those institutions in the market and the institutions are required to report to ensure that they comply with legal and fiduciary regulations. The main relationship between the government and institutions however, is not through these direct channels but through the market. While the state government sets higher education policies, these policies are not aimed at controlling higher education institutions directly. Rather, the state government tries to influence the market and by utilising market mechanisms, indirectly impact the behaviour of higher education market institutions. Both state government and higher education institutions accumulate information on the market mechanisms and both can assess the likely outcomes of a particular policy.

Figure 3: Relation between state government and higher education institutions without market

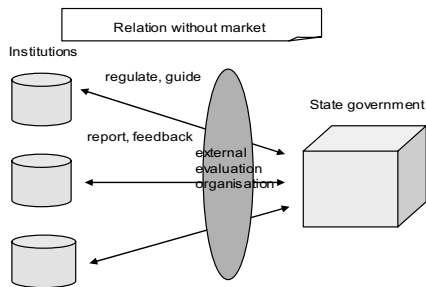
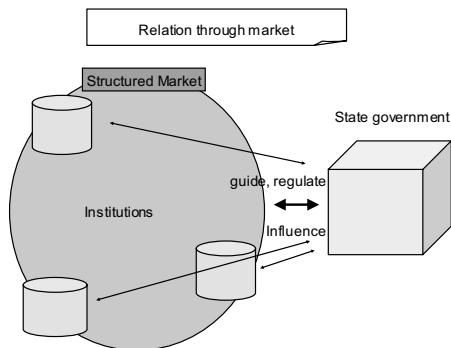


Figure 4: Relation between state government and higher education institutions through market



The role of market mechanisms in Japan has become intensified in a way that probably has not been seen in any other system for a number of overlapping reasons. With over 70% of graduates going on to tertiary education, Japan already has a 'universal system' and room for further expansion within this age group appears to be somewhat limited. Although there is an 'overlapping hierarchy', with some exceptions private universities cater to the bottom 75% of students on the academic scale and still rely almost entirely on fees from students for their survival. The governmental subsidy introduced in the 1970s in the era of welfare-state reforms was expected to increase to 50% of running costs but after peaking at just under 30% in the early 1980s has since steadily fallen under the pressure of neo-liberalism to around a mere 10%. Despite protestations from the private university sector that the state has a moral if not a legal obligation to help them financially (in return for having helped with the excess demand for higher education in the post-war period)¹², there is little possibility in the current climate of the overall state subsidy being increased; state support may be increasingly provided to the top research-oriented private universities through various research programmes established with state money. Lower-level private universities see a bleak future. Many have seen application rates fall to between half and one-tenth (10%) of those of only ten years ago. Many are seeing only around half of their graduates secure employment within six months of graduation and up to 20% of students drop out while on course. Many go to vocational schools (*senmongakkō*) which are enjoying something of a boom, to earn practical qualifications which will improve their job prospects. Others are seeing their campuses increasingly turned into what Refsing (1992) has memorably called 'depositories' as students string out their courses in the hope that the job market will pick up; in many private universities, only about 60% of universities are completing their courses within the expected 4 years.

To survive, it is widely accepted that many private universities will need to reform very quickly (Kitamura 2002; Kusaka et al. 2003). As we have seen above, their internal management structures often make reforms, even minor reforms, extremely difficult to implement. It is difficult for them to enter the new markets that the US universities developed in the 1970s when they faced the same pressure. The reforms they are

12 Some private university leaders even argue that the state's moral obligation should be tied to the fact that the only higher education from the 9th to the end of the 19th century was provided by the private sector. Possibly the best account in English of the historical relationship between the state and the private education sector in Japan is provided by James and Benjamin (1988).

trying to implement give interesting insights into what they see as their inherent weaknesses. They have concentrated on establishing courses which will be seen as more socially relevant to the need of students in the employment field (such as business and law schools, or in the welfare field which is the major expected growth area in the Japanese economy as the population continues to age) and improving the quality of support and services that they provide to those students. Due to how universities are administered and because of the perception that professors have of themselves, reform is proving very hard to implement in many institutions. The next few years will be very painful for private universities in Japan. On the positive side however, it is likely that those universities able to successfully reform themselves in the face of the financial pressures will come to play a more important role in socialising and training young people to be part of the professional and social fabric of the society rather than simply, as many have hitherto described them, as liminal sites for young people to 'play' in before they are trained to be corporate workers by companies. In this respect, it can be argued that the market may be playing a positive role in the public interest. The blurring, if not yet disappearance, of the distinction between the public and private university sectors in Japan might also be argued to be in the private interest as individuals have a clearer concept of the return of their investment in higher education and also greater opportunity of investment regardless of their social class backgrounds.

The emphasis on allowing the market to determine policy outcomes is not new of course, in a highly developed large private higher education system such as exists in Japan. What is new is that Japan is about to see a 'hollowing out' of its huge private higher education system of a sort that has never been seen before. It is still hard to anticipate how that process will actually take place. The other interesting feature of the Japanese case is that the relationship which has long existed between the state and private universities is now becoming extended to the national and public institutions. In Japan we can see a critical transformation and integration of public and private higher education policies. It is possible that the emergence of this new relationship between the state, institutions, and the market across the public and private higher education sectors may go further; namely to the integration of the higher education policies with the industrial policies needed for Japan's knowledge economy (Yonezawa 2007). What is also clear is that we need to watch very closely what happens in Japan over the next decade since it will have important implications for our understanding of the relationship between public and private higher education not only across East Asia but globally as well.

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