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LMS Usage and Adoption in Japan

Penetration, platform shares, buyer dynamics and a fieldwork design for universities and vocational institutions.

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Eric is a learning futurist, tinkering with and designing technologies that may better inform the future of teaching and learning. Eric's projects have included augmented tourism rallies, AR community art exhibitions, mixed reality escape rooms, and other experiments in immersive technology.

His core passion is to understand the factors and technologies reshaping how humans happily teach, learn, work, and grow. He works with districts, schools, and companies to best design and deploy technology for teaching and learning, has helped set up immersive learning labs, designed online courses, and consulted on technology initiatives in different contexts.



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Executive assessment

89.5%

of responding universities had an institution-wide LMS in 2023 (AXIES)

816

universities in MEXT's 2026 preliminary count, 3,000,542 students

2,647

professional training colleges (senmon gakko), 580,229 students

Japan is already a highly penetrated university LMS market. The best recent nationwide evidence is the 2023 higher-education ICT survey conducted by the Academic eXchange for Information Environment and Strategy, or AXIES, with cooperation from Japan's Ministry of Education, Culture, Sports, Science and Technology. The survey covered all 1,171 universities, junior colleges and colleges of technology in scope, received 718 institutional responses, and the published university analysis used 488 university responses. It found that 89.5% of responding universities had an institution-wide LMS. Adoption had continued to rise after the emergency-online-teaching period rather than falling back once campuses returned to predominantly face-to-face instruction.

The size effect is pronounced. In 2023, institution-wide LMS adoption was 100.0% among universities with more than 10,000 undergraduates, 98.6% at 5,001-10,000 students, 95.3% at 3,001-5,000, 91.5% at 1,001-3,000, and 78.3% at 1,000 or fewer students. In 2013, the corresponding small-institution figure was only 29.5%. The remaining university greenfield opportunity is therefore concentrated disproportionately in smaller institutions.

This is a large education market even though core-LMS penetration is high. MEXT's August 26, 2026 preliminary School Basic Survey counts 816 universities, comprising 85 national, 104 local-public and 627 private universities, with 3,000,542 university students. Japan also has 58 colleges of technology, or KOSEN, with 56,249 students, and 2,647 professional training colleges, or senmon gakko, with 580,229 students. The professional-school sector is particularly important for an EDT & Partners TVET definition because it is more than three times as numerous as the university sector by institution count.

If the 2023 AXIES university adoption rate were mechanically applied to the 816-university 2026 universe, it would imply roughly 730 universities with institution-wide LMS deployments and 86 without one. That is a scenario calculation, not a measured 2026 installed-base count. Given the continued upward trend through 2023, the actual 2026 greenfield university pool may be smaller.

For market attractiveness, this shifts the commercial question. The university opportunity is primarily replacement, consolidation, cloud migration, integration, analytics and improvement in utilization, rather than first-time LMS installation. The TVET/senmon-gakko segment is much less well measured publicly and therefore deserves primary research before assuming that its penetration resembles the university market. That conclusion follows from the high measured university penetration, the substantial professional-school universe, and the absence of an equivalent recent national TVET LMS census in the sources reviewed.

A second important finding is that "LMS adoption" does not mean uniform depth of use. Among institutions able to report course-level usage in the AXIES study, the 2023 share of courses using an LMS ranged from 64.7% to 77.4% across university-size groups. Moreover, only 45.5% of the smallest universities and roughly 57–72% of the other size groups could provide the underlying course-use counts. The distinction between "we have an LMS," "faculty use it," and "faculty use advanced capabilities" should therefore be central to interviews.

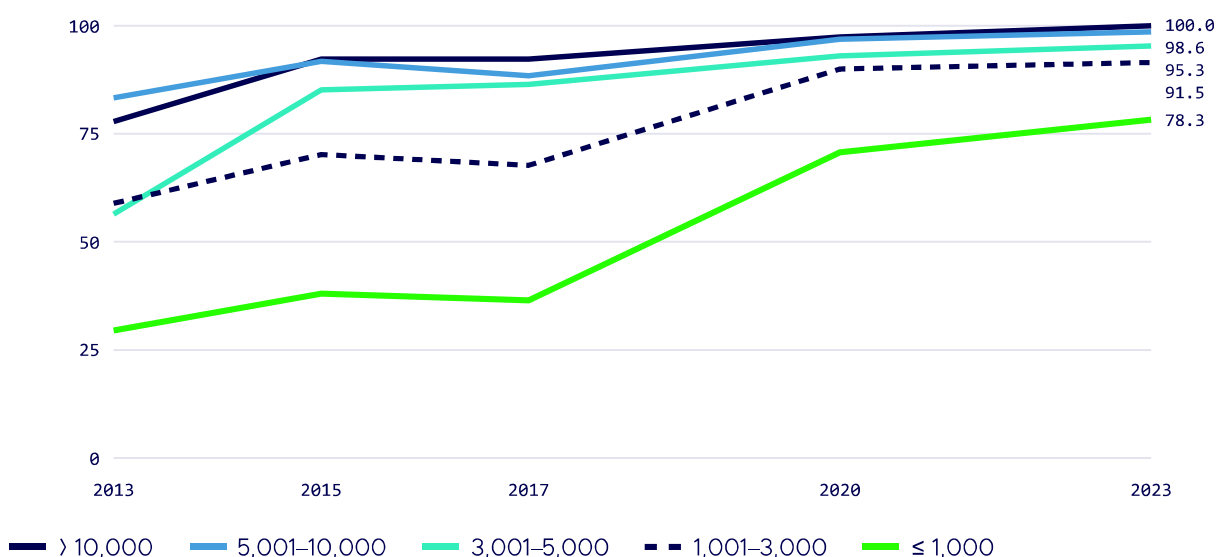
Adoption, usage and market structure

The post-COVID adoption curve

AXIES has run nationwide higher-education ICT surveys in 2015, 2017, 2020 and 2023, supplementing a comparable MEXT-commissioned 2013 study. The 2023 authors note that more than 90% of universities had conducted online classes during the COVID period and that LMS adoption increased accordingly. What is strategically significant is that institution-wide adoption continued increasing between 2020 and 2023 after the return toward face-to-face instruction.

The adoption trajectory by undergraduate enrollment is:

FIGURE 1 · INSTITUTION-WIDE LMS ADOPTION BY UNDERGRADUATE ENROLLMENT, 2013–2023 (%)



Source: AXIES higher-education ICT surveys 2015–2023 and MEXT-commissioned 2013 study, as reported in the 2024 AXIES analysis.

Undergraduates	2013	2015	2017	2020	2023
More than 10,000 students	77.8%	92.3%	92.3%	97.4%	100.0%
5,001-10,000	83.3%	91.8%	88.4%	96.9%	98.6%
3,001-5,000	56.4%	85.2%	86.4%	93.0%	95.3%
1,001-3,000	58.9%	70.2%	67.7%	90.0%	91.5%
1,000 or fewer	29.5%	38.0%	36.5%	70.7%	78.3%

Two commercial implications follow. First, the pandemic appears to have accelerated an underlying transition rather than creating a temporary category. Second, the most obvious first-LMS opportunity among universities is at the very small end, while the larger institutions are almost entirely a replacement or expansion market. These are inferences from the AXIES time series.

Course-level utilization

The nationwide data also permits a distinction between installation and actual instructional use. For 2023, universities that could quantify LMS-enabled courses reported LMS usage in:

72.8% of courses at institutions above 10,000 students; 68.8% at 5,001-10,000; 64.7% at 3,001-5,000; 77.4% at 1,001-3,000; and 77.1% at institutions with 1,000 or fewer students.

These figures should not be interpreted as national course-level averages because the share of institutions able to report the underlying number varied considerably. In 2023, 72.5% of the largest group could report course-use counts, compared with 58.9%, 62.3%, 57.1% and 45.5% in the smaller groups.

That measurement gap is itself commercially relevant. It suggests that some institutions have an LMS without strong central visibility into actual course adoption. An analytics proposition that helps institutions measure faculty adoption, student engagement and course activity may address a different need from the core LMS itself. That is an inference that should be tested in interviews.

Multiple-LMS environments are common

Japan should not be modeled as a simple one-university/one-LMS market. Among 2023 institutions with institution-wide deployments, the average number of LMS types was 1.6 at the largest universities, 1.5 in the 5,001-10,000 group, 1.6 at 3,001-5,000, 1.4 at 1,001-3,000 and 1.3 among the smallest institutions.

Only 52.5% of the largest universities used a single LMS type, compared with 63.0%, 54.1%, 64.3% and 78.0% in successively smaller groups. Forty percent of the largest institutions reported two systems, and a small number reported as many as five.

This matters for market sizing. Product "shares" cannot simply be added to 100%, and apparently entrenched universities may still constitute expansion opportunities. It also creates plausible demand for integration, identity, analytics and content interoperability across systems.

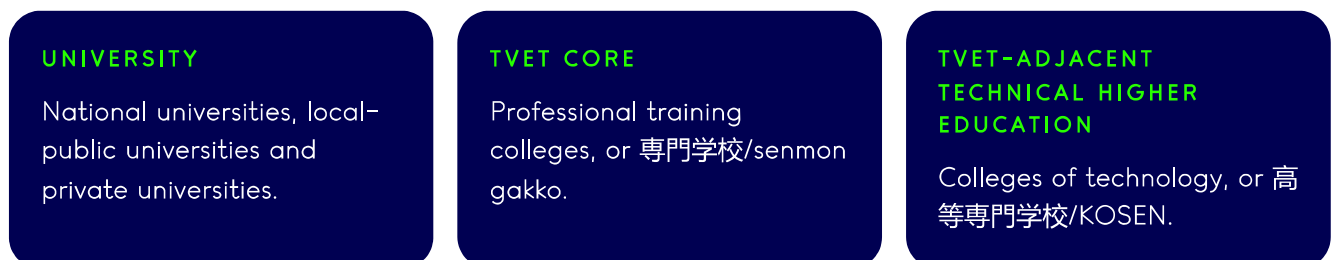
The addressable institutional base

As of May 1, 2026, MEXT's preliminary census identifies 816 universities: 85 national, 104 local-public and 627 private. Universities enroll just over 3.0 million students, of whom 2.664 million are undergraduates and approximately 285,000 graduate students.

This ownership mix makes private institutions particularly important commercially. Private universities represent approximately three quarters of the university count in the current MEXT data. The AXIES respondent base was similarly dominated by private universities: among the 488 university responses analyzed, 74 were national, 48 local-public and 366 private.

The non-university postsecondary market is also material. MEXT reports 2,647 professional training colleges in 2026, of which 2,467 are private, enrolling 580,229 students. Japan has 58 KOSEN, of which 51 are national, enrolling 56,249 students.

For EDT's research, I would therefore define the relevant education segments explicitly:



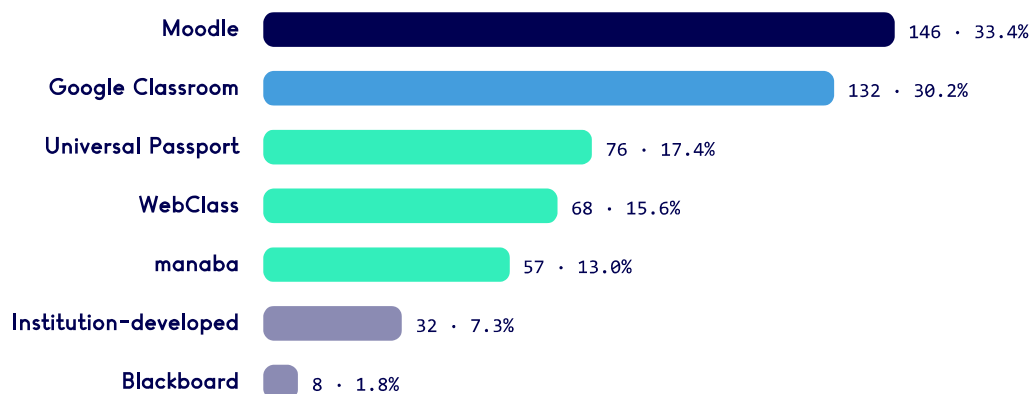
That distinction matters because Japan does not organize all vocational education under a single institution type. MEXT treats professional training colleges and KOSEN separately in its census and regulatory structures.

Competitive ecosystem

The strongest national installed-base data

The AXIES study provides a much better basis for market-share discussion than vendor marketing claims. Among the 437 university respondents with institution-wide LMS installations in the 2023 analysis, the reported platform counts across size groups sum to:

FIGURE 2 · INSTITUTION-WIDE LMS PLATFORMS REPORTED, 437 ADOPTERS (COUNT · SHARE OF ADOPTERS)



Calculated from published AXIES 2023 counts across size groups. Shares are not mutually exclusive; respondents could report multiple institution-wide LMS products.

Moodle: 146 institutions, approximately 33.4% of institution-wide adopters in the sample. Google Classroom: 132, approximately 30.2%. Universal Passport: 76, approximately 17.4%. WebClass: 68, approximately 15.6%. manaba: 57, approximately 13.0%. Institution-developed systems: 32, approximately 7.3%. Blackboard: 8, approximately 1.8%.

These are calculated from the published AXIES counts and are not mutually exclusive market shares, because respondents could report multiple institution-wide LMS products. Universal Passport also sits closer to the integrated campus-information/portal category than a pure-play LMS in many deployments, although it was included as an LMS choice in the AXIES survey.

The absence of Canvas from the principal categories in the national table does not mean zero Japanese adoption. For example, a current Canvas LMS endpoint exists for Yamato University. Rather, the AXIES data show that Canvas did not form one of the major reported categories in this particular 2023 national analysis.

Market position varies sharply with institution size

Footprint among adopters	> 10,000	5,001–10,000	3,001–5,000	1,001–3,000	≤ 1,000
Moodle	30.0%	37.0%	49.2%	35.0%	22.8%
Google Classroom	32.5%		19.7–27.9%		41.5%
WebClass	15.0%	19.2%	19.7%	15.7%	11.4%
manaba	20.0%	16.4%	13.1%	13.6%	8.1%
Blackboard	7.5%	5.5%	–	–	–

Moodle is particularly strong in medium-size universities: 30.0% of the >10,000 group, 37.0% at 5,001–10,000, 49.2% at 3,001–5,000, 35.0% at 1,001–3,000 and 22.8% among universities with 1,000 or fewer students. AXIES found a statistically significant association between university size and Moodle adoption.

Current institutional evidence confirms continuing use. Gunma University describes its university-wide LMS as Moodle; Kyushu University states that Moodle continues after April 2026 even as other digital teaching services are retired; Chiba University uses Moodle for course materials and quizzes; and the University of Toyama runs Moodle for both liberal-arts and specialist courses.

Google Classroom has the opposite size pattern: 32.5% of the largest group and 41.5% of universities with 1,000 or fewer students, compared with 19.7–27.9% in the middle groups. AXIES also found this size relationship statistically significant. The likely commercial interpretation is that Classroom's accessibility and broader Google ecosystem are especially competitive for small institutions, although the causal reason should be established through interviews rather than assumed.

WebClass, a Japanese higher-education-oriented LMS, is comparatively even across the market: 15.0%, 19.2%, 19.7%, 15.7% and 11.4% across the five size classes. Current evidence includes Kansai University's LMS, which identifies itself as WebClass.

manaba is more prominent in large universities than small ones: 20.0% above 10,000 students, 16.4% at 5,001–10,000, 13.1% at 3,001–5,000, 13.6% at 1,001–3,000 and 8.1% below 1,001. The AXIES test did not find a statistically significant size association for manaba, however, so the observed gradient should not be overinterpreted.

Current manaba institutions include the University of Tsukuba, where the university's Educational Cloud service explicitly identifies manaba as its LMS, and Chuo University, where manaba is the university-wide class-support system supporting materials, reports, quizzes and attendance.

Blackboard appears primarily in the largest institutions in the 2023 sample: 7.5% above 10,000 students and 5.5% at 5,001–10,000, but almost absent in the three smaller categories. AXIES found the size association statistically significant.

Domestic integration is part of the competitive proposition

The evidence shows that the competitive unit is often not the LMS alone but the LMS integrated with student records, course registration and identity.

At Otaru University of Commerce, manaba synchronizes user, course and enrollment-roster information from CampusSquare. Courses are automatically created from the academic system, with synchronization every 30 minutes during April and October and daily during other months.

At Otsuma Women's University, the manaba account is tied to the same institutional credentials used for Universal Passport.

At Tsurumi University, enrollment data from the campus portal feed manaba, while course information is rolled over on March 20 for the next academic year.

Kyoto Sangyo University's 2026 Moodle notice similarly says that course information is loaded when the new year's Moodle environment opens and enrollment synchronization begins on March 31.

These examples point to a significant switching barrier: replacing the front-end LMS is not enough. A competitor must reproduce enrollment feeds, course creation, SSO, authorization, annual rollover, downstream reporting and operational support. This is an inference from the observed integrations.

What actually drives product selection

Reason for selecting the LMS (multiple responses)	> 10,000	5,001–10,000	3,001–5,000	1,001–3,000	≤ 1,000
Has the necessary functions	77.5%	65.8%	63.9%	65.0%	53.7%
Used at many universities; implementation examples easy to obtain	50.0%	58.9%	59.0%	56.4%	47.2%
Integration with other academic-administration systems	25.0%	32.9%	36.1%	29.3%	23.6%
Open-source status	27.5%	26.0%	27.9%	16.4%	17.1%
Price commensurate with functions	30.0%	–	–	–	14.6%
Low implementation cost	20.0%	–	–	–	30.9%
Many suppliers could provide competing quotations	0.8–5.5% across all size groups				

AXIES asked institutions why they selected their LMS, allowing multiple responses. "Has the necessary functions" was the most common reason at every institution size, cited by 77.5% of the largest universities, 65.8% at 5,001–10,000, 63.9% at 3,001–5,000, 65.0% at 1,001–3,000 and 53.7% of the smallest universities.

The second major factor was market referenceability: "used at many universities, so implementation methods and examples are easy to obtain" was selected by 50.0%, 58.9%, 59.0%, 56.4% and 47.2%, respectively. That is unusually important for a market-entry strategy. A vendor with several visible Japanese reference universities may acquire an advantage beyond the individual accounts themselves.

Integration with other academic-administration systems was cited by 25.0% of the largest universities, 32.9%, 36.1%, 29.3% and 23.6% across the remaining size groups. Open-source status was a selection reason for 27.5%, 26.0%, 27.9%, 16.4% and 17.1%.

Price mattered, but the pattern is nuanced. "Price commensurate with functions" was cited by 30.0% of the largest institutions but only 14.6% of the smallest. Conversely, "low implementation cost" was cited by 30.9% of the smallest universities, the highest of any size group, versus 20.0% of the largest.

Only 0.8–5.5% selected a system because many suppliers could provide competing quotations. This implies that breadth of reseller choice was much less influential than capability, referenceability, cost or integration in the reported decisions.

For EDT's buyer-dynamics work, that is one of the most actionable datasets in the research: Japanese universities appear to buy for fit and institutional confidence first, not simply for lowest headline license price. This characterization is an inference from the reported selection-reason frequencies and should be tested in procurement interviews.

Buyer dynamics and market attractiveness

Likely decision-making structure

Current university LMS pages show that LMS ownership commonly sits at the intersection of academic support and institutional IT rather than exclusively with procurement. Tsukuba's manaba service is managed within its educational-cloud environment; Chuo presents manaba as a university-wide teaching-support system; Kyoto Sangyo identifies its Information Center as the Moodle support function; and Kansai University maintains a dedicated LMS support contact.

For interviews, the practical buying committee should therefore be treated as multi-stakeholder. At each university I would seek the executive responsible for education or digital strategy, the LMS/IT service owner, academic affairs or registrar staff responsible for course/enrollment data, and at least one faculty power user. For replacement projects, procurement, information security and privacy become additional respondents.

The interview should distinguish economic buyer, technical gatekeeper, academic sponsor and operational owner. One of the hypotheses to test is that an LMS can be academically preferred yet fail on integration, security, migration or procurement requirements before reaching a contract decision. The AXIES finding that functionality, market references and systems integration are all material selection reasons supports this design.

Purchase timing and the Japanese academic calendar

Several live implementations point to a strong operational dependency on the April academic-year boundary. Otaru increases enrollment-data synchronization frequency during April and October; Tsurumi changes manaba course information around March 20; and Kyoto Sangyo begins new-year Moodle enrollment synchronization on March 31.

This implies that migrations, data conversion, testing and faculty readiness need to be completed before the academic-year rollover. For a challenger vendor, missing that window can effectively delay a large-scale replacement. The interview guide should ask institutions to work backward from their April launch date through RFP, budget approval, contracting, data conversion and training.

Market attractiveness by segment

LARGE UNIVERSITIES

Attractive for high-value replacement and enhancement, weak for greenfield. Institution-wide adoption is effectively universal in the 2023 evidence, and large institutions are more likely to operate more than one LMS. The opportunity is consequently consolidation, replacement, cloud operations, interoperability, learning analytics, AI-related capability and specialist use cases rather than basic deployment.

MID-SIZE UNIVERSITIES

Attractive but incumbent-heavy. Adoption ranges from 91.5% to 98.6% depending on the size band, Moodle is particularly strong, and integrations with academic systems matter. New entrants should expect migration and reference requirements to be substantial.

SMALL UNIVERSITIES

The strongest university greenfield segment. Full-institution deployment was 78.3% in the 2023 survey, Google Classroom had a 41.5% footprint among full-LMS adopters in the smallest group, and low implementation cost was relatively salient. A premium enterprise-LMS proposition may therefore need a materially different implementation and pricing model for this segment.

PRIVATE UNIVERSITIES

Commercially essential. They account for 627 of Japan's 816 universities in the 2026 preliminary census. Any national higher-education strategy that treats private universities as secondary would miss most institutions.

PROFESSIONAL TRAINING COLLEGES

Potentially the most interesting discovery segment. There are 2,647 professional schools and 580,229 students, but the public evidence reviewed does not provide an AXIES-equivalent current LMS penetration figure. MEXT's 2024 School Education Act reform also moves professional schools closer to university-style structures in some areas by allowing learning-time standards to be defined in credits, permitting qualifying advanced courses, and strengthening evaluation requirements. That makes the segment worth treating as its own market rather than simply applying university assumptions.

KOSEN

Smaller but digitally organized. Japan has 58 colleges with roughly 56,000 students, and the National Institute of Technology network operates centralized digital learning infrastructure, including a WebClass environment. Anan KOSEN has also publicly procured an LMS, making KOSEN useful for understanding public-sector technical-education purchasing even though the total addressable institution count is much smaller than senmon gakko.

The strategic opportunity is increasingly above the LMS layer

Because the core category is already penetrated, the most useful interviews should test willingness to pay for capabilities around the existing platform: analytics, student-success alerts, AI-enabled teaching support, assessment integrity, content interoperability, richer mobile workflows, accessibility, integrations and reduced administration.

There is some evidence of adjacent services already being rationalized. Kyushu University is continuing Moodle after April 2026 while retiring the B-QUBE digital-teaching-material distribution service and Metaboard learning dashboard at the end of March 2026. This is useful evidence that institutions periodically reconsider the wider learning-technology stack even while retaining the underlying LMS.

A market entrant should therefore not assume that winning Japan requires displacing Moodle, manaba or WebClass outright. A complementary layer with low migration risk may have a lower institutional barrier than a core-LMS replacement. This is a strategic inference from the installed-base and integration evidence.

Regulatory and culture-risk overlay

Personal information and cloud architecture

The Act on the Protection of Personal Information is a material LMS diligence issue because LMS records can contain names, institutional identifiers, enrollments, submissions, grades, usage histories and other student data.

Japan's Personal Information Protection Commission explicitly states that while ordinary outsourcing is not treated as third-party provision under the basic rule, entrusting personal-data processing to an entity located abroad can bring the special rules for provision to a foreign third party into play.

Server location alone does not resolve the issue. PPC states that where a foreign cloud operator handles personal data stored on a server in Japan, the arrangement can still constitute provision to a foreign third party, subject to the detailed statutory conditions.

PPC also requires an outsourcing organization to understand the relevant foreign country's personal-information regime and implement appropriate supervision and security measures when a foreign processor, or a foreign subprocessor, handles the data. PPC says this remains relevant even when the processor accesses data residing on servers physically located in Japan.

For a non-Japanese LMS vendor, the practical implication is that "Japan-region hosting" is not by itself a complete compliance proposition. Interviews should probe where support staff can access data, subprocessors, logging and backup locations, contractual controls, breach processes and the institution's interpretation of cross-border access.

Copyright and LMS-hosted course materials

Japan has a specific copyright framework relevant to digital course distribution. The compensation system for public transmission for educational purposes, administered by SARTRAS, was established through the 2018 copyright-law amendment. It allows qualifying educational institutions, subject to the scheme's conditions and payment of compensation by the institution's establisher, to make certain public transmissions of copyrighted materials for classes without securing individual permission each time.

SARTRAS specifically gives examples such as transmitting teacher-prepared materials containing third-party works to student devices for preparation or review and uploading such material to a server for instructional use. This directly intersects with ordinary LMS document distribution.

As of September 18, 2026, SARTRAS had announced that the compensation amounts would remain unchanged for fiscal 2027, illustrating that the scheme is an ongoing part of digital-course operations rather than a pandemic-only measure.

Professional-school regulation is evolving

The 2024 amendment of Japan's School Education Act affects the specialist-school market. MEXT says the changes permit professional training programs to define learning requirements through credits, create qualifying advanced courses, require self-evaluation on items comparable with universities and encourage external evaluation.

For LMS vendors, that does not automatically mandate LMS purchase, but it strengthens the rationale for structured course, credit, assessment and quality-assurance data in a segment containing 2,647 professional colleges. That market implication is an inference that should be tested directly with specialist-school administrators.

Culture risk should be tested as organizational behavior, not stereotype

The available evidence supports several Japan-specific operating hypotheses without requiring broad cultural generalizations.

Referenceability is unusually important. Roughly half or more of universities in most size categories said a reason for LMS selection was that the system was already used by many other universities and implementation examples were easy to obtain. This creates a potential "reference flywheel": early credible Japanese higher-education customers can lower perceived adoption risk for later institutions.

Integration creates institutional inertia. Current deployments automatically synchronize student, enrollment and course data with campus systems and institutional accounts. A replacement therefore affects administrative workflows beyond teaching.

Operational reliability around April matters. The observed March/April rollover processes mean failed migration has immediate teaching consequences at the beginning of the academic year. This plausibly increases institutional risk sensitivity around switching.

Local evidence matters more than a global installed base alone. The AXIES survey explicitly finds domestic university usage and available implementation examples to be major selection reasons. For an international vendor, Japanese references, implementation partners, Japanese-language support and demonstrable integrations should therefore be tested as separate buying criteria rather than bundled into a generic "localization" question.

Recommended institutional fieldwork

A particularly strong research design is possible by matching public-sector and private universities on LMS platform. This controls partly for product differences and makes it easier to isolate governance, budget, procurement and decision-making differences.

One terminology issue should be resolved at the outset. MEXT distinguishes national universities, 国立, from local-public universities, 公立. If EDT's "public universities" means all publicly controlled universities, national institutions are appropriate. If the quota strictly means the Japanese legal category 公立, the sample must instead come from the 104 local-public universities counted by MEXT in 2026.

MANABA PAIR	MOODLE PAIR	WEBCLASS PAIR
University of Tsukuba National	Kyushu University National	University of Miyazaki National
Chuo University Private	Ritsumeikan Asia Pacific University Private	Kansai University Private

Public-sector university sample

University of Tsukuba, manaba. Tsukuba currently states that manaba is its learning-management system. It provides a useful large research-university case for a Japanese commercial SaaS LMS and centralized educational-cloud governance.

Kyushu University, Moodle. Kyushu currently operates Moodle and explicitly confirms that it continues after April 2026 while other education-platform services are retired. This is a valuable case for understanding open-source LMS economics, internal capability and decisions about which adjacent services to keep or replace.

University of Miyazaki, WebClass. Its institutional learning environment provides the third major Japanese platform family and would complete a manaba/Moodle/WebClass public-sector comparison.

These three are national universities rather than the narrower 公立 category. If EDT requires three legally local-public institutions, the recruiting frame should be redrawn from MEXT's 104 公立 universities rather than silently conflating the categories.

Private university sample

Chuo University, manaba. Chuo currently describes manaba as its university-wide class-support system, including materials, reports, quizzes and attendance. It creates a clean private-university comparison with Tsukuba.

Ritsumeikan Asia Pacific University, Moodle. APU states that it has used an LMS since academic year 2001 and introduced its cloud-based APU Moodle environment from academic year 2023 for material distribution, reports and attendance. Its international orientation adds a useful perspective on multilingual and globally benchmarked requirements while giving a private-sector comparison with Kyushu's Moodle operation.

Kansai University, WebClass. Its current LMS identifies WebClass directly and maintains dedicated user support. This provides the private comparison for the WebClass case.

The resulting six-university design is analytically stronger than simply selecting six famous institutions: manaba pair: Tsukuba and Chuo. Moodle pair: Kyushu and APU. WebClass pair: Miyazaki and Kansai. It allows EDT to ask nearly identical questions about adoption, satisfaction, integration, switching and governance while partially controlling for the LMS being discussed.

TVET sample

Anan College, National Institute of Technology. Anan KOSEN is an attractive public technical-education case because LMS procurement activity is publicly visible, while the broader KOSEN system also exposes a centralized WebClass learning environment. It can reveal how a technically sophisticated, publicly governed vocational institution evaluates and procures learning platforms.

For the second case, I would deliberately choose a private professional training college, 専門学校, in IT, design, business or healthcare, rather than another KOSEN. Public sources establish a universe of 2,647 professional colleges, overwhelmingly private, but do not provide the same reliable nationwide LMS-installation map available for universities. The second TVET institution should therefore be selected after a short screening call confirming its LMS, enrollment scale and willingness to discuss buying decisions.

That is more informative than using two KOSEN because it captures both major institutional models relevant to Japanese TVET.

Interview volume and respondent structure

For the eight target institutions, an ideal field program is about 24–32 institutional interviews, rather than one interview per institution. Three or four respondents per institution lets EDT triangulate what otherwise may be very different narratives.

At minimum, each case should include the person who owns or administers the LMS, the academic/education-side stakeholder responsible for teaching and learning, and the student-information or academic-affairs stakeholder responsible for course/enrollment data. In larger replacement decisions, add procurement, information security or the executive sponsor.

The interview guide should reconstruct the latest LMS decision chronologically: trigger; incumbent; alternatives considered; requirements; stakeholders with veto authority; budget; procurement route; integrations; migration effort; security and privacy review; faculty adoption; support burden; vendor satisfaction; switching barriers; renewal timing; and the next three capabilities for which the institution would realistically allocate money.

For usage, avoid asking only "Do you use an LMS?" The national data make that question almost non-discriminating. Ask instead what percentage of courses use it, which functions are actually used, whether use is mandated, whether the institution measures faculty adoption, and what remains outside the platform.

Research partner and expert recruitment

The best existing expert network uncovered in this research is the team behind the 2024 AXIES national LMS analysis. The authors are Rieko Inaba of Tsuda University, Hiroyuki Sakai of Kyoto University, Yasuhiko Tsuji and Noshi Hiraoka of the Open University of Japan, Wakako Fushikida of Tokyo Metropolitan University, Kazuya Fujioka of Hokkaido University, and Katsusuke Shigeta of Hokkaido University's Information Initiative Center. The paper identifies Inaba as corresponding author. Their study is unusually close to EDT's research question because it directly analyzes Japanese university LMS adoption by institution size using the 2023 national ICT survey.

I would treat these academics primarily as expert-interview and referral leads, not assume that any of them is available for part-time commercial fieldwork. Availability, external-work permissions and conflicts would need to be established directly. Their value is that they are likely to know the Japanese higher-education LMS research community and can potentially point toward qualified researchers or project staff.

AXIES itself is the most relevant institutional network identified. Its ICT-use survey group has conducted national higher-education ICT research repeatedly since 2015 and, with MEXT cooperation, surveyed universities, junior colleges and KOSEN nationwide in 2023.

For the part-time research-coordinator role, the optimal profile is somewhat different from a senior academic. EDT should prioritize a Japan-based, native or near-native Japanese speaker who can interview in Japanese and synthesize in English; has experience with university administration, educational technology or institutional research; understands Japanese research etiquette and appointment-setting; and can manage consent, transcription and structured coding across 25-plus interviews. Experience with LMS administration or higher-education ICT procurement would be more useful than general consumer-market research.

A sensible recruiting sequence is to use the AXIES study authors and broader AXIES network for referrals, then look for a bilingual project researcher or recent doctoral/postdoctoral researcher in educational technology or higher-education studies. This separates subject-matter authority from fieldwork availability and reduces the risk of trying to hire a senior professor for coordination work better suited to an experienced researcher.

The invitation should identify EDT & Partners, describe the work as an internal market-attractiveness study, state the expected period and approximate hours, explain that interviews will cover LMS adoption and institutional purchasing rather than evaluate individual teaching performance, and specify that the role is compensated. That degree of specificity is likely to make institutional outreach easier because prospective researchers can explain the project accurately when approaching university contacts.

I cannot personally enter a compensated engagement, sign a consulting agreement or conduct offline interviews on EDT's behalf. The research and coordination work I can perform is within this environment. For the human field role, the AXIES/referral route above is the strongest lead generated by the desk research.

RESEARCH PRIORITY

The overall research priority should now be clear: university LMS penetration itself is no longer the principal unknown. The national evidence already puts institution-wide penetration at 89.5% in 2023 and near saturation among medium and large institutions. The higher-value questions for EDT are replacement propensity, true depth of course use, decision authority, integration-driven switching cost, incumbent satisfaction, willingness to pay for capabilities above the LMS layer, and the much less documented state of adoption across Japan's 2,647 professional training colleges.



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University of the Philippines Open University



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