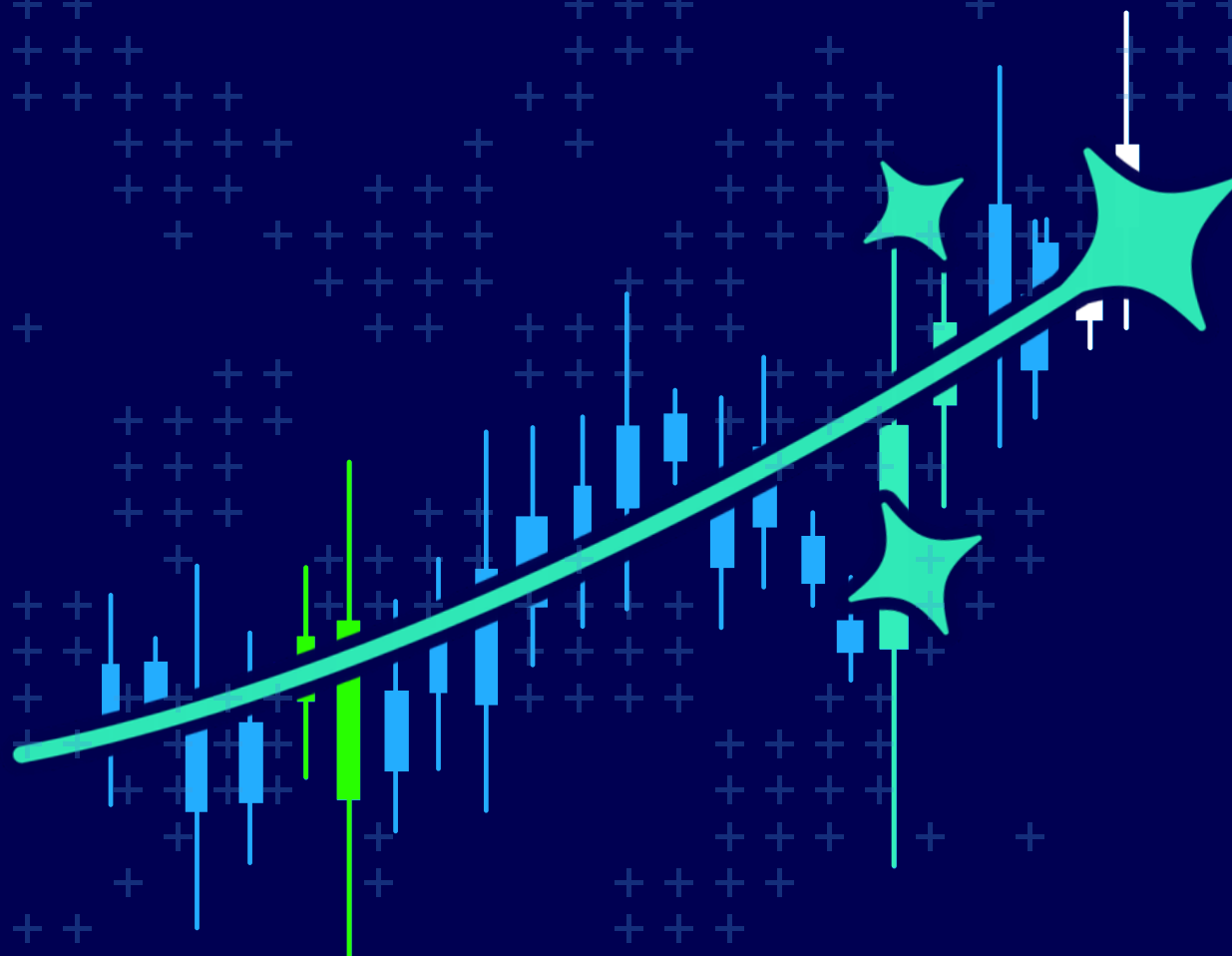




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REVIEW · UNREVIEWED · SEP 2026 · VOLUME 3, ISSUE 1

LMS Adoption and Market Dynamics in Japanese Higher Education: Usage, Platform Competition, Buyer Behavior, and Institutional Risk

A national market assessment of learning management systems across Japanese universities and vocational education.

Eric Hawkinson



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Registered with Crossref. Cite and link this work as <https://doi.org/10.62883/ZTDW6513> – the address that outlives site redesigns.

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Abstract

Japan has become a highly penetrated learning management system (LMS) market, but widespread institutional adoption does not necessarily indicate equivalent levels of instructional use or market maturity. Drawing on national survey data, institutional documentation, government sources, and publicly available evidence, this study examines LMS adoption, platform distribution, course-level utilization, institutional purchasing behavior, system integration, and regulatory considerations across Japanese higher education. National data indicate that 89.5% of responding universities had an institution-wide LMS by 2023, with adoption approaching saturation among medium and large universities while remaining lower among the smallest institutions. The analysis identifies a fragmented competitive environment led by Moodle, Google Classroom, Universal Passport, WebClass, and manaba, with significant variation by institutional size. It also finds that LMS selection is shaped by institutional referenceability, integration with academic administration systems, implementation requirements, cost, and procurement practices. Multiple-LMS environments and deep connections to enrollment, identity, course creation, and academic-calendar workflows create substantial switching costs. Regulatory issues surrounding personal information, cloud architecture, copyright, and professional-school governance further influence market entry and deployment. The study argues that future LMS opportunities in Japan are likely to be concentrated less in first-time university adoption than in replacement, integration, analytics, interoperability, and services surrounding the LMS layer. It also identifies Japan's professional training college sector as a comparatively under-measured area requiring further primary research. The paper concludes with a proposed institutional fieldwork framework designed to investigate buyer decision-making, faculty adoption, switching barriers, and unmet needs across universities and vocational institutions.

KEYWORDS

earning management systems · LMS adoption; Japan · higher education · educational technology · Moodle · Google Classroom · manaba · WebClass · university procurement;

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ERIC HAWKINSON

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.



Roles

Professor – Kyoto University of Foreign Studies
Research Coordinator – MAVR Research Group
Founder – Together Learning
Developer – Reality Labo
Community Leader – Team Teachers
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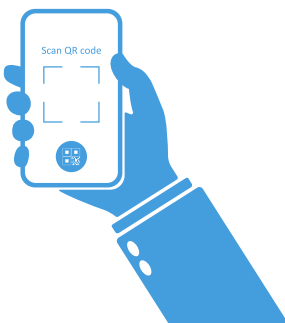
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