

Why Google Japan Lost to Sky Co., Ltd. in the Education Sector: An Autopsy Report of the "Quirky Structure"

Introduction

Within Japan's GIGA School Program, the global tech giant Google has, paradoxically, failed to fully leverage its potential in the Japanese education sector. Instead, domestic vendors like Sky Co., Ltd. have seized the initiative. This phenomenon is not merely a matter of product performance differences; rather, it stems from a "quirky structure" created by Japan's unique administrative culture and procurement practices. This report analyzes the four core factors behind this dynamic, interspersed with Ayana's insightful observations.

1. The Ministry of Education (MEXT) & Local Governments' "Package Faith"

MEXT and local governments in Japan rarely conceive of independently operating or building their Google Workspace (GWS) environments. There's a strong "bento box faith" – a belief that "everything being pre-packaged, like SkyMenu, is righteousness."

Result: The flexible and open GWS is often shunned as "too difficult to use." This preference for bundled solutions, even if they lack transparency or full functionality (like the intentional bypassing of Google Vault and audit logs, as observed in Chiba City), seems to override the original intent of comprehensive digital education.

2. The Entrenched Relationship with Sky Co., Ltd. & NEC Corporation

Sky Co., Ltd. and NEC Corporation have been continuously supplying ICT to the education sector since the 2000s, building trust as "long-standing partners" with local governments. Sales representatives maintain personal contact, respond to phone calls, and resolve issues based on these "traditional relationships." **In Contrast:** Google, typically fostering a "learn-it-yourself" approach after initial

adoption, is often viewed with caution by Japanese institutions accustomed to a "Showa-era context" (i.e., a reliance on hands-on, face-to-face support and established networks). This existing "old boys' network" (as seen with potential ties between former Chiba City Mayor Kumagai and NEC/NTT groups, and the confirmed hardware compatibility between SkyMenu and NEC devices) often circumvents true competitive bidding.

3. Google Japan's Lack of Aggressive Sales (or Absence of Japan-Specific Strategy)

Google's philosophy is fundamentally "learn and use it yourself." **In Contrast:** Sky Co., Ltd. offers extensive training, paper manuals, and explanation sessions specifically for local government officials, meticulously bridging the digital literacy gap. This direct, hand-holding approach aligns better with the operational style of many Japanese public sector entities. This disparity in sales and support strategies allows Sky to capture market share, even when core Google features (like proper email authentication and Vault auditing) are intentionally undermined or ignored in the implemented systems.

4. The "Security Paradox": Unobservable Infrastructure Driven by Local Government Demands

Despite publicly stating the adoption of "Google Workspace for Education," the reality in places like Chiba City is often a proprietary infrastructure spearheaded by Sky Co., Ltd. and NEC. This setup intentionally bypasses Google's native auditing and log management functions (like Google Vault), funneling educational emails through local systems like "CHAINS" (Chiba City Administrative Information Network System) which are managed by NEC. **The Crux:** This is not merely a technical oversight; it's a "deliberate log-hiding and trace-avoidance configuration" (as seen with mail routing via NEC-affiliated IPs and CHAINS, leading to DMARC failures and the inability to trace official communications). The educational logs from SkyMenu are isolated within CHAINS (a closed network), making them physically inaccessible for external audit or parental review.

This suggests that the local government itself may have demanded a system designed to prevent oversight, rendering the "Google 導入" (Google adoption) claim a mere facade. This "bypassing Google for accountability avoidance" structure effectively allows for the potential commercial exploitation of children's data without transparency or parental consent, a practice that would face severe ethical and legal repercussions under Western standards like GDPR or COPPA.

Conclusion

This "quirky structure" reveals that Google's actual role in Japan's GIGA School initiative is often relegated to a nominal presence, with its robust auditing and transparency features deliberately undermined. The underlying reasons are a complex interplay of administrative preference for bundled solutions, deep-seated relationships with domestic vendors, Google Japan's differing sales approach, and, most critically, an apparent intentional design by local governments (in cooperation with vendors) to create a system that lacks accountability and transparency, potentially facilitating the undisclosed commercial use of educational data.

This situation raises significant ethical and governance concerns, potentially amounting to the unauthorized use of public funds and children's data under the guise of "modern education."

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