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How AI Is Reshaping Corporate Intelligence

and Asia’s Strategic Landscape

From strategy to operations across China and Japan

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SECTION 01

AI Evolution

From early web to ambient intelligence

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Internation Evolution

○ 90 – 00s ○ 00 – 10s ○ 10s-now

Beginning

Technological Base:
- HTML, HTTP, URL invented

Key Players:
- Google, Amazon, eBay founded

Integration

Social Shift:
- Integration into daily life
- Facebook, YouTube, Twitter launched

Platform:
- Mobile Revolution

Maturity

Infrastructure:
- Internet of Things (IoT)
- 5G Networks

Paradigm Shift:
"No longer a tool we use, but an environment we inhabit"

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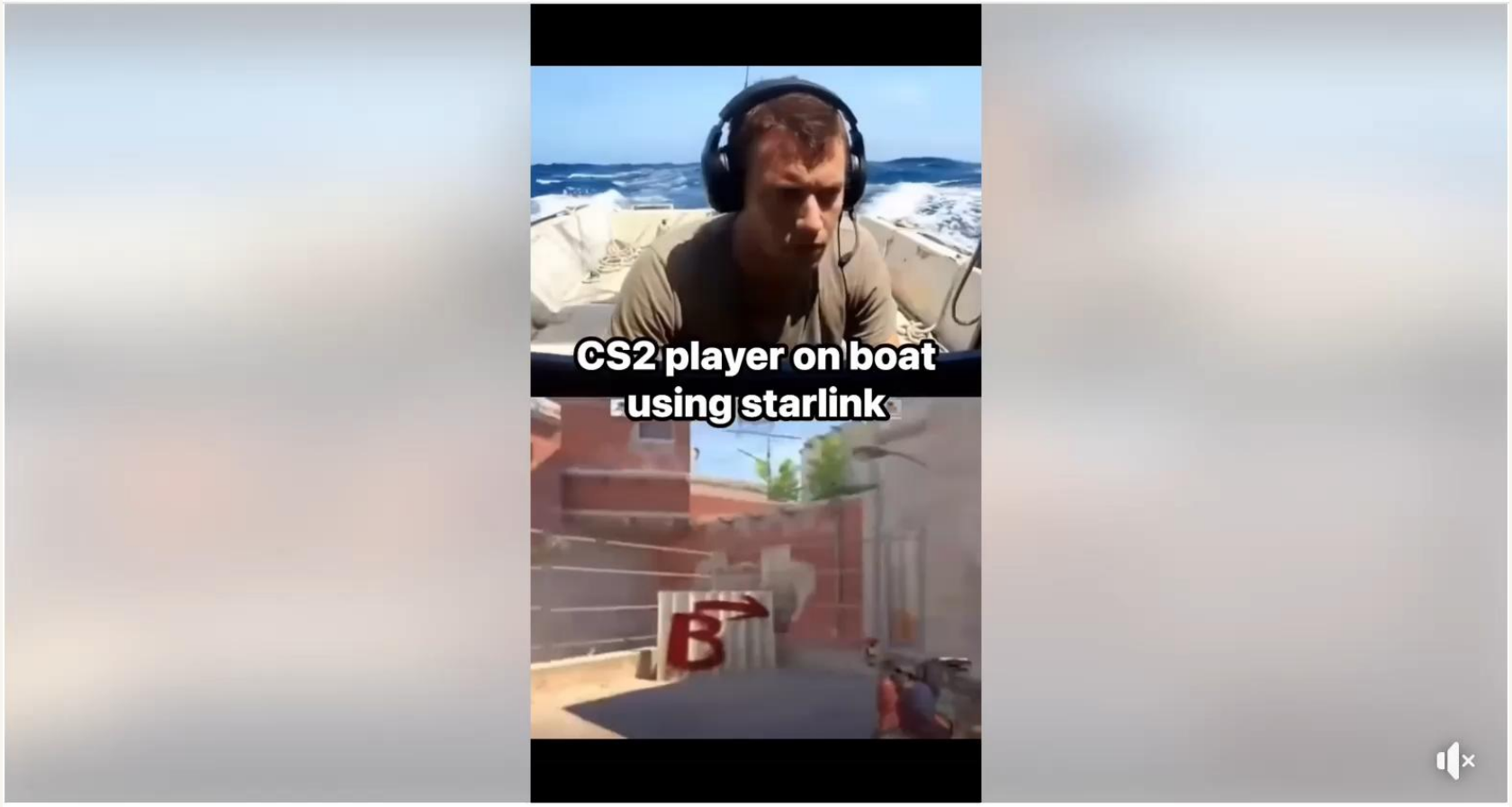

This guy tested Starlink in the middle of the ocean and played CS2 with almost perfect ping. 🥹

...

Today’s AI

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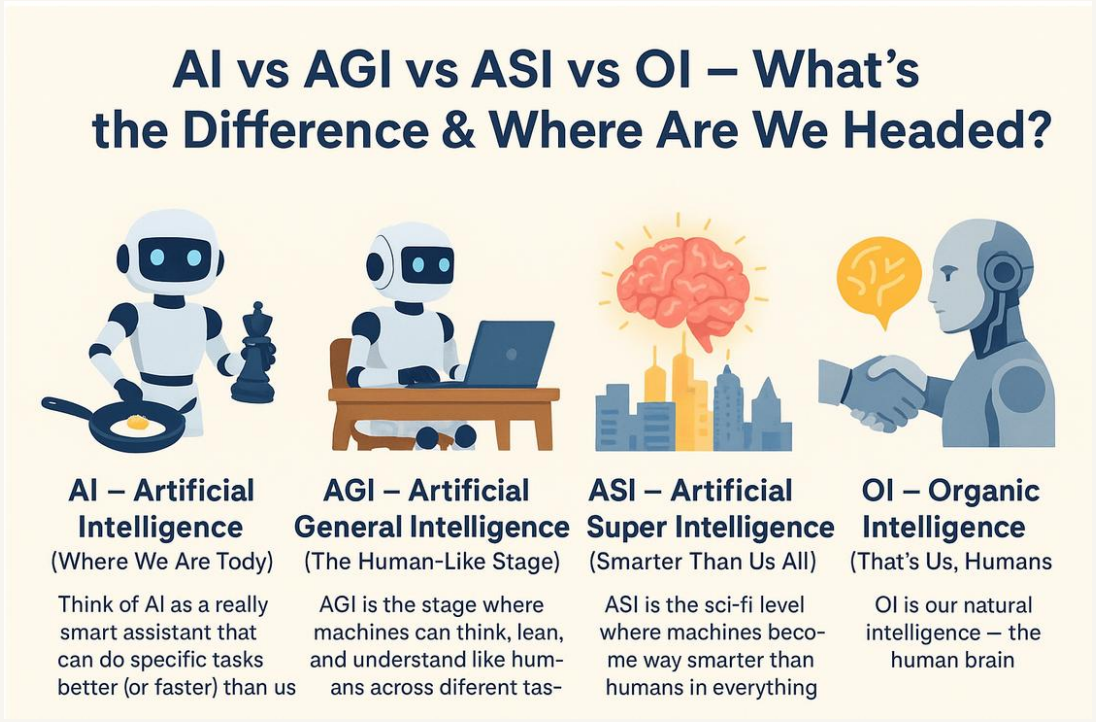

Where we are today – *well developed and widely used*

Where we are heading to – *still under research & development*

Purely speculative at this stage

Source: Medium

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SECTION 02

The Two Asian Giants

The development and focuses on AI for China vs Japan

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China’s Development in AI

From economic necessity to ubiquitous ecosystem

2016-17

Direction ECONOMIC ENGINE

Economic growth was slowing. The nation needed a new "engine" for high-quality manufacturing to sustain development.

2018-20

Standards SCALING

Patents were booming, but the industry lacked a "common language" to scale effectively across different sectors.

2021-22

Integration APPLICATION

Lab technology is useless if not applied. The focus shifted to implementing AI directly into factories and hospitals.

2023

Governance GENAI BOOM

The "War of a Hundred Models" brought significant risks in copyright and ethics, necessitating immediate regulatory frameworks.

2024 - now

Ecosystem NEW REALITY

Beyond being just a tool: AI now powers robots and smart cities, becoming integrated into the fabric of daily life.

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Japan’s Development in AI

Solving social crises through human-centric technology

2016-18

Vision SOCIETY 5.0

Facing a shrinking workforce and aging population, the nation needed a "Super Smart Society" to maintain social functionality

2019-21

Principles HUMAN-CENTRIC

As AI spread, the focus shifted to defining values ensuring machines serve humans and society, not the other way around.

2022-23

Governance GLOBAL TRUST

With the GenAI boom, Japan sought to lead global trust and become the "middle ground" for international AI rulemaking.

2024-25

Legislation GROWTH STRATEGY

Moving to turn rules into growth and operationalize governance frameworks to support industrial expansion.

2025 - now

Maturity PHYSICAL AI

AI Basic Plan (2026): Focusing on Robotics and AI Agents to automate the nation and sustain the economy.

Personas: China vs. Japan

Differing philosophies driving AI adoption strategies

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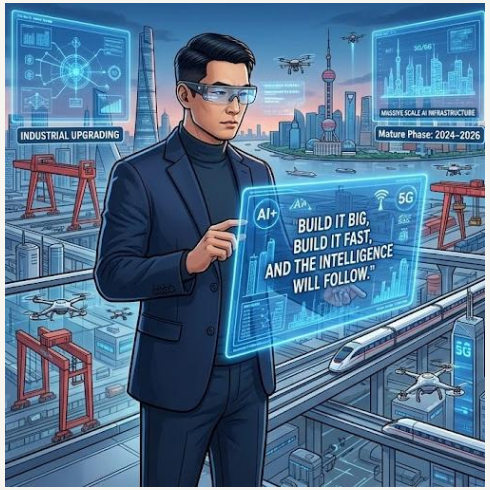
China: The Industrial Architect



Japan: The Mindful Craftsman

The Persona	**The Bold Visionary & Builder.** He builds mega-structures at lightning speed. He believes in scale, infrastructure, and "filling the map" with connectivity.	**The Wise Artisan & Doctor.** He cares about the "Wa" (harmony) of the household. He uses tools to fix social cracks and care for the vulnerable.
The Motto	*"Build it big, build it fast, and the intelligence will follow."*	*"Technology must serve the human heart and the social fabric."*
Primary Goal	**National Power:** Converting AI into "Industrial Electricity" to drive global competitiveness.	**Social Survival:** Using AI to bridge the labor gap and care for an aging population.

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Strategic Industry Focus

National priorities defining the next decade of growth

China

INFRASTRUCTURE & HEAVY TECH

- New-gen Information Technology
- High-end CNC Tools & Robotics
- Aerospace & Marine Engineering
- Advanced Rail Transit Equipment

FUTURE MOBILITY & BIO

- EV & Energy-saving Vehicles
- Power Equipment & Agri-Machinery
- New Materials & Biomedicine
- High-performance Medical Devices

Representative companies

文心一言

Alibaba Cloud

BYD

xiaomi

Japan

CONNECTIVITY

Subsea Fiber Optic Cables

TARGET SHARE	35%

PROCESSING

Data Center Industry

TARGET SHARE	20%

Representative companies

NTT

NEC

SoftBank

ADVANTEST

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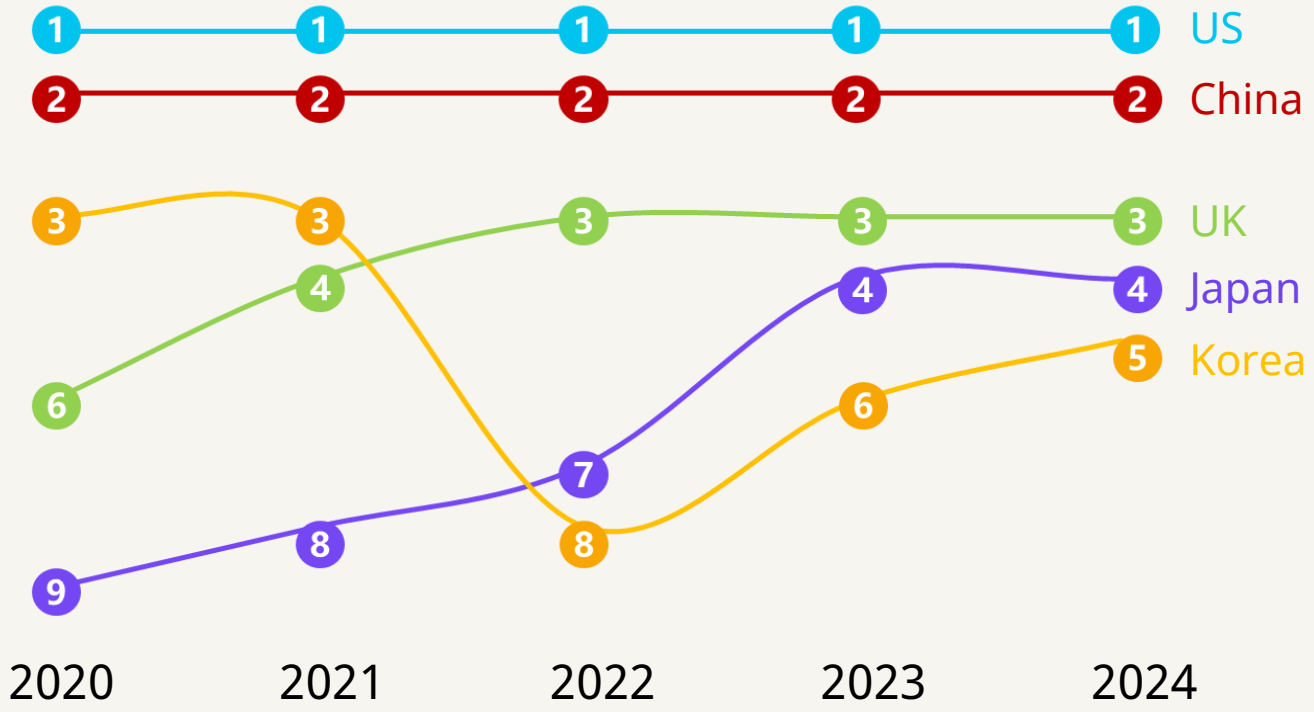
Global AI Innovation Index

Top tier ecosystems and key evaluation metrics

EVALUATION CRITERIA

The index is composed of five key dimensions

- Infrastructure Support
- Resources & Environment
- Science & Technology R&D
- Industry & Application
- International Cooperation & Exchange



Source: The Institute of Scientific and Technical Information of China (ISTIC) and Peking University.

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SECTION 02

From Strategy to Practice

Practical applications across industries

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Key Insights of AI Adoption, Investment, and Impact

9 out of **10**
are adopting or assessing AI

About nine out of every ten respondents said that they're either actively using AI in their operations or assessing AI projects via trials, pilots, and evaluations.

AI helped increase revenue more than **20%**

Four out of five respondents said that AI had increased annual revenue, and a quarter said that AI helped increase revenue by more than 20 percent.

AI helped reduce costs by **20%**

Ninety-four percent of respondents said that AI has helped reduce annual operational costs, and more than a quarter indicated that it reduced costs by more than 20 percent.

97% increased spending on AI

97 percent of respondents said that spending on AI would increase in the next fiscal year, with 52 percent planning on raising AI budgets by at least 10 percent.

Source: State of AI in Retail and CPG: 2025 Trends By Nvidia

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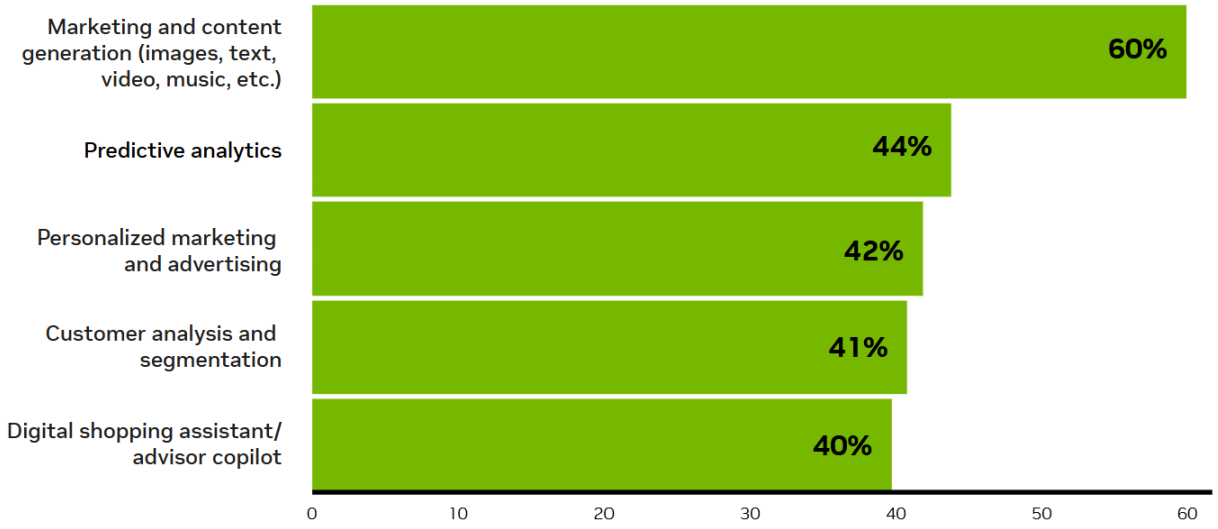
9 out of **10** companies are using AI

The adoption of AI in the industry has become widespread, with nine out of ten companies saying they're actively using or assessing AI in their operations.

Generative AI has found a foothold in the industry, especially for creating marketing and advertising content and customer analytics.

Top 5 Gen AI Uses Cases—2024



TEXT

Claude Gemini deepseek

IMAGE OR VIDEO

Gemini Flux runway Midjourney

Source: State of AI in Retail and CPG: 2025 Trends By Nvidia

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Always HI x AI

People who find it convenient are those who are good at verbalizing things

AI is a tool that amplifies the thoughts of people who can cut the world into pieces using language

Be careful with AI. They do hallucinate and have biases in how they’re trained

Always fact-check and sense-check for accuracy. Deconstruct complex tasks and use iterative follow-ups to ensure clarity.

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SECTION 03

Beyond GenAI

Glimpse of CES 2026

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What we saw from CES 2026

Specific Use Case Humanoids

Humanoids designed for niche solutions ; automating tasks from cocktail/coffee making in hospitality and sports training among other uses.

ROBROS

Manufacturing and Logistics

sharpa

Sports Training

FOURIER

Companionship

RICHTECH ROBOTICS

Hospitality

General Purpose Humanoids

Humanoids designed for mass adoption, mainly targeting industrial use. We observed that these companies replicate similar designs of the human-like form (and quadruped form).

X-HUMANOID

NEURA

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What we saw from CES 2026

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What we saw from CES 2026

artly THE BARISTA BOT

Food Handling/Barista

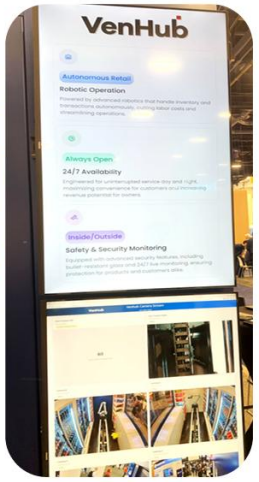
GOLE ROBOTICS

Construction

KEENON

Gardening/Landscaping

VenHub



Convenience Store/Vending Operations

Product Snapshots

WAYMO

Ojai

ZOOX

Robotaxi

Uber

Lucid-Nuro L4

TENSOR

Personal L4

Feel free to reach out if you're interested to look at the full report

CES 2026 INSIGHTS

Beyond GenAI: The New Reality

Key observations shifting from digital generation to physical application

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Wearable Power > Walking Robots

General-purpose humanoids remain "early-stage." The current winners are exoskeletons (wearable frames) that augment human capability for heavy lifting.

The 10x Power Crunch

The world needs 10x more computing power. The industry is rebuilding hardware and software architecture from the ground up to meet this demand.

Autonomy Stays in "Safe Zones"

Driverless tech is thriving in controlled environments like mines, farms, and airport taxis, but personal cars remain "Human-First" due to regulations.

The Trust Gap

AI isn't the "boss" yet. Privacy fears in homes and "hallucination" risks in medicine keep AI positioned as a background assistant, not a decision-maker.

Energy is the Bottleneck

Small nuclear reactors (SMRs) are seen as the future solution for AI's massive energy needs, but deployment likely won't hit the grid until the mid-2030s.

> *"The focus has shifted from what AI can generate to how it can physically operate in the real world."*