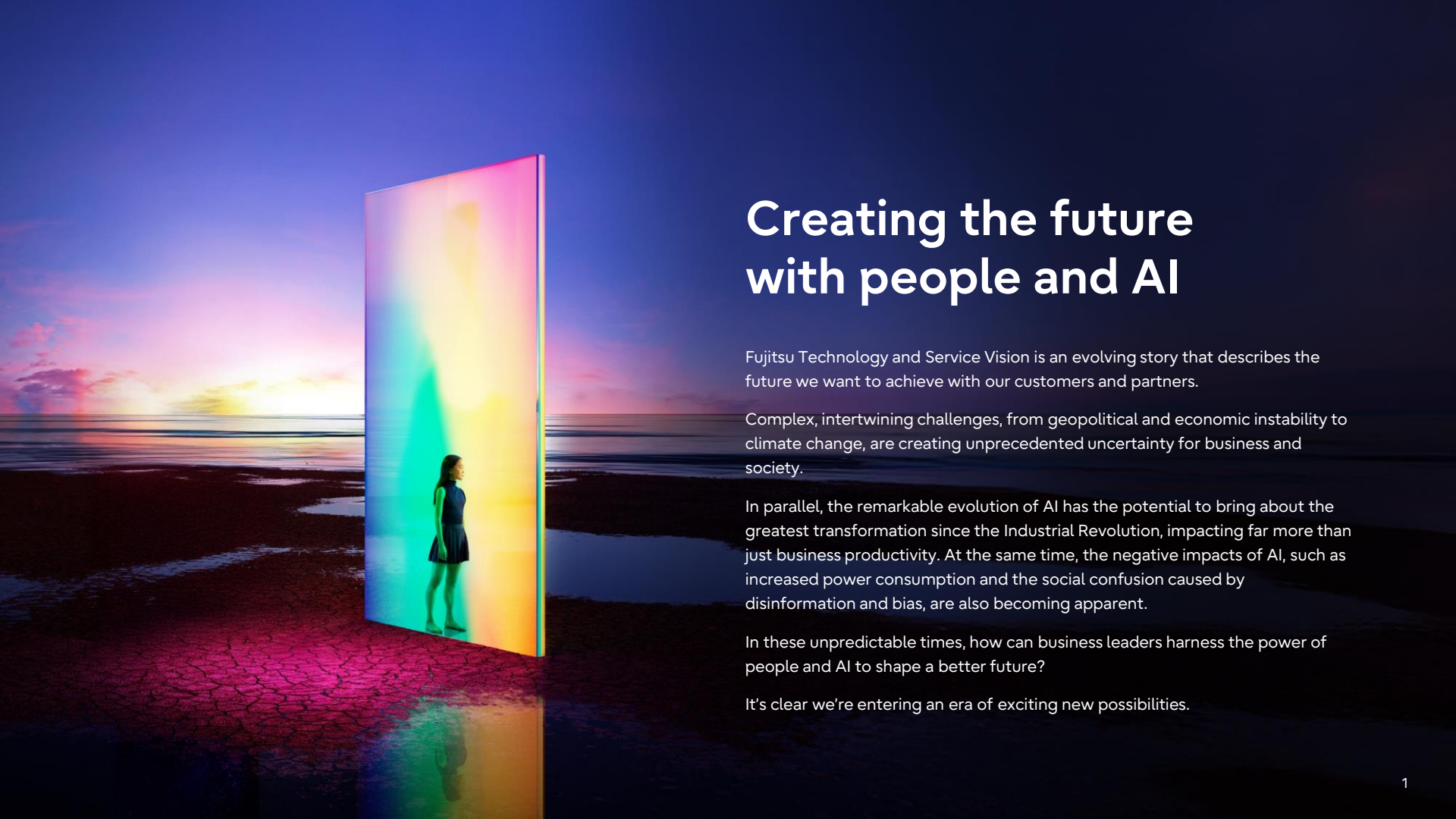
Fujitsu Technology and Service Vision 2025

Executive summary | English edition



Creating the future with people and AI

Fujitsu Technology and Service Vision is an evolving story that describes the future we want to achieve with our customers and partners.

Complex, intertwining challenges, from geopolitical and economic instability to climate change, are creating unprecedented uncertainty for business and society.

In parallel, the remarkable evolution of AI has the potential to bring about the greatest transformation since the Industrial Revolution, impacting far more than just business productivity. At the same time, the negative impacts of AI, such as increased power consumption and the social confusion caused by disinformation and bias, are also becoming apparent.

In these unpredictable times, how can business leaders harness the power of people and AI to shape a better future?

It's clear we're entering an era of exciting new possibilities.

External factors affecting business

In addition to economic and technology issues, business leaders are also addressing structural societal issues. According to Fujitsu's February 2025 survey[1] of 800 CxOs, inflation and fluctuations in interest and exchange rates will have the most significant impact on business over the next three years. The rapid evolution of AI was the next most significant factor, followed by poverty, inequality and population issues. These issues are having a significant effect on business strategy.

The Institute for Health Metrics and Evaluation (IHME) at the University of Washington shocked the world by suggesting that the global population will peak at 9.7 billion in 2064, a much lower number than was previously forecast.[2] A dramatic increase in productivity will be essential to maintain sustainable growth in a society with a declining population. AI and other related technologies clearly have the potential to improve productivity significantly.

External factors with the greatest impact on business in the next three years

Sample size: 800

1	**Inflation, interest rate and exchange rate fluctuations**	Politics and economics
2	**Rapid evolution of AI**	Technology
3	**Poverty, inequality, access to education and healthcare**	Well-being
4	**Population problems (population decline, aging and labor shortages)**	Politics and economics Well-being
5	Energy problems (clean energy, supply security)	Environment
6	Climate change (global warming, forest fires and floods)	Environment
7	Human rights issues (dignity, race, ethnicity, gender and minorities)	Well-being
8	Geopolitical tensions and conflicts	Politics and economics

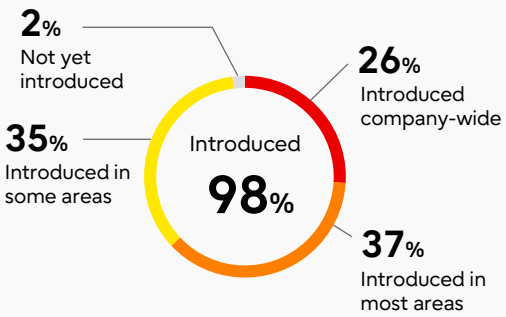
1) Fujitsu commissioned Frost & Sullivan to conduct a survey of CxOs in Europe, North America, APAC, and Japan – February 2025.
2) Institute for Health Metrics and Evaluation. Used with permission. All rights reserved.

Creating value with people-AI collaboration

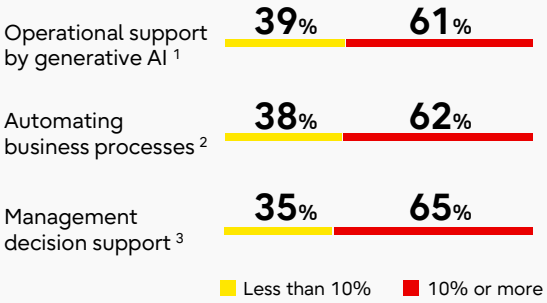
Many organizations are already pursuing strategic AI initiatives. Almost all organizations surveyed have completed trial or company-wide generative AI initiatives. Over 60% of organizations that use AI report that it's already increased employee productivity by more than 10%. AI is clearly producing tangible results.

According to our survey, 81% of business leaders expect that by 2030, more than 50% of their business processes will be integrated with AI, while 79% of business leaders expect that by 2030, their entire workforce will be assisted by AI. Business leaders need to introduce AI strategically, transforming their organizations to become AI-driven, enabling people and AI to collaborate and create value together.

Status of generative AI introduction



AI-based productivity improvements



Sample size: 1) 297 2) 255 3) 245
Number of respondents who currently use AI in their respective operations

Predictions for 2030

Business driven by AI

81%

More than 50% of business processes will integrate AI

Collaboration of people and AI

79%

Nearly every employee will be assisted by AI to perform their tasks

Accelerating value creation for the environment and society using ecosystems

To grow sustainably, organizations need to not only address external factors and improve productivity through AI but also maintain a long-term perspective, despite the short-term pressures they face. We're now seeing the emergence of organizations that see addressing environmental and well-being challenges as a major business opportunity. These organizations are actively pursuing net positivity[1] to create new value.

Many organizations are now pursuing ecosystems to create net positive value. Cross-industry ecosystems, for example for promoting renewable energy, creating smart cities, extending healthy life expectancy, are underway around the world.

Shifting towards net positive business

Will shift from a business focused solely on economic growth to one that also pursues environmental and well-being value

83%

Shifting towards an ecosystem-based business

Will shift from delivering value as an individual organization to an ecosystem-based business model

81%

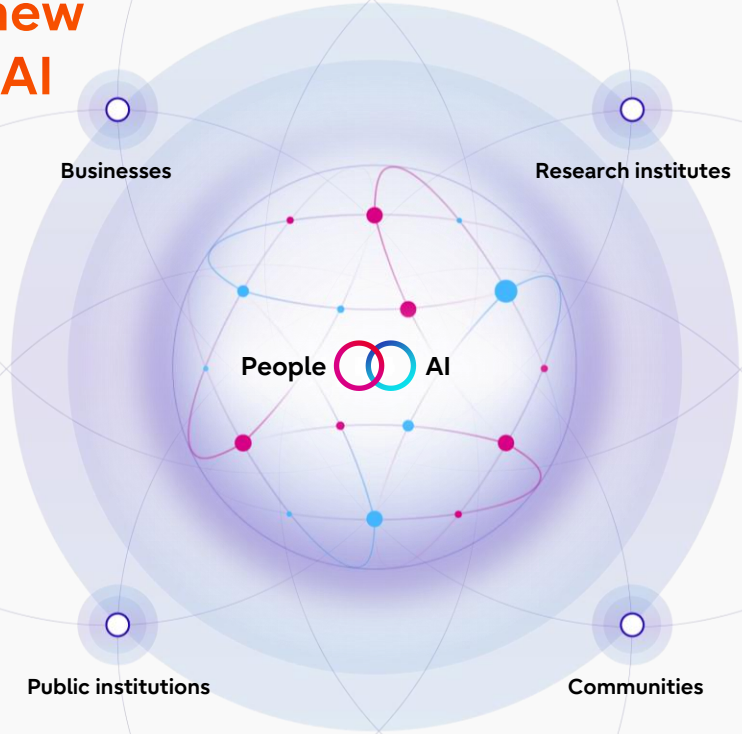
1) Net positive: A company's positive impact on the environment and society is greater than its negative impact on the environment and society.

Creating net positive value through new ecosystems centered on people and AI

As AI implementation accelerates, the future of business will be increasingly shaped by people-AI collaboration. At the same time, we've seen the emergence of pioneering organizations that regard addressing social challenges as a business opportunity, building cross-industry ecosystems to produce tangible results. The combination of these two major trends is key to future business strategies.

New value-creation ecosystems, with people and AI at the center, can generate value and realize net positivity through collaboration with cross-industry partners. These 'regenerative ecosystems' can help us to address even our most complex social challenges.

Next, we share our technology vision, exploring how AI-centered technologies will create value through new ecosystems.



A regenerative ecosystem

Creating value with people-AI collaboration

People AI

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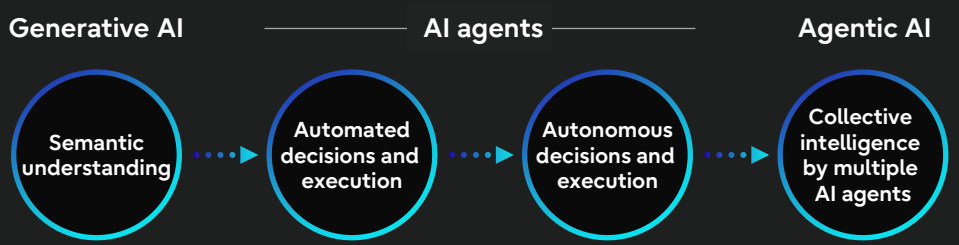
Scaling value creation with ecosystems

Evolving AI agents transform people, business and society

Generative AI understands semantics, making it possible for people and AI to communicate naturally. But this is just the beginning. The real AI revolution begins now. The key is the evolution to AI agents and ultimately to Agentic AI that can act autonomously to achieve their goals.

AI agents automatically determine and execute actions, in accordance with pre-set rules, based on collected and analyzed information. In the future, AI agents with the ability to learn from real-world situations, referred to as embodiment, will evolve to autonomously judge situations and take optimal actions. Furthermore, multiple AI agents will form Agentic AI systems that work together to tackle more complex challenges. We believe that AI will become an entity that coexists with people, creating new value through goals shared between people and AI.

We will now describe how the evolution of AI agents will transform people, business and society.



People – Unlocking human potential

Collaboration with AI agents to maximize people's creativity and productivity.

Business – Redesigning business

AI agents will deliver diverse intelligence across organizational barriers, driving innovation.

Society – Contributing to net positive

Multi-AI agents will connect various organizations to create value for the environment and society.

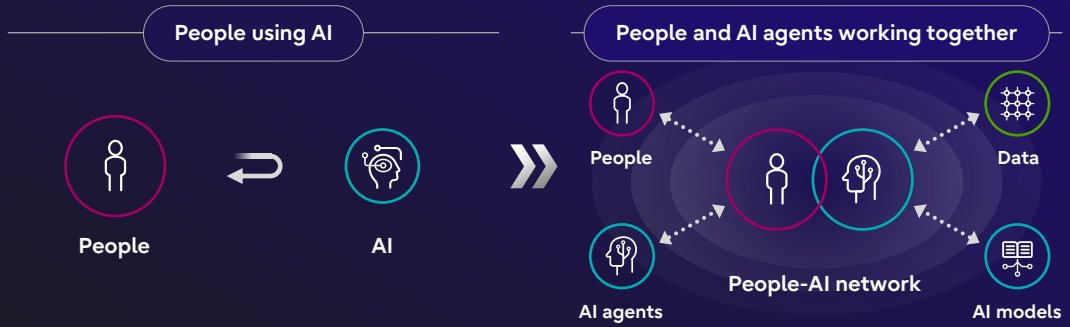
Unlocking human potential

AI agents maximize individual creativity and productivity

AI agents will act as partners, acting autonomously to maximize people's abilities and creativity, within clear goals and guidelines set by people. This will free people up from routine tasks, dramatically increasing productivity and giving people more time to take on more creative challenges.

In addition, AI agents will form networks that connect people with diverse knowledge and data, AI models that use data to create solutions and other AI agents. By using these networks, people and AI will work together to develop ideas beyond the capability of any individual.

Supported by this network of people and AI, people will be able to unleash their individual potential for innovation and creativity.



Future scenarios

Creating materials with an AI agent

Lee is developing new biomass materials[1] at BioMaterials. Using his direction that 'we want to achieve superior quality and durability', Lee's AI agent Nova investigated patents and proposed possible new manufacturing methods. The collaboration with Nova allowed Lee to focus more on creative work. Nova demonstrated a deep understanding of Lee's intentions, evolving into a more autonomous partner.

1) Biomass materials: Materials made from renewable organic resources such as plants.

AI, growing with people

By adding three key elements to today's generative AI, AI will evolve into autonomous AI agents that enable people and AI to collaborate, working together as intellectual partners to unlock human potential.

1 | Multimodal generative AI technology

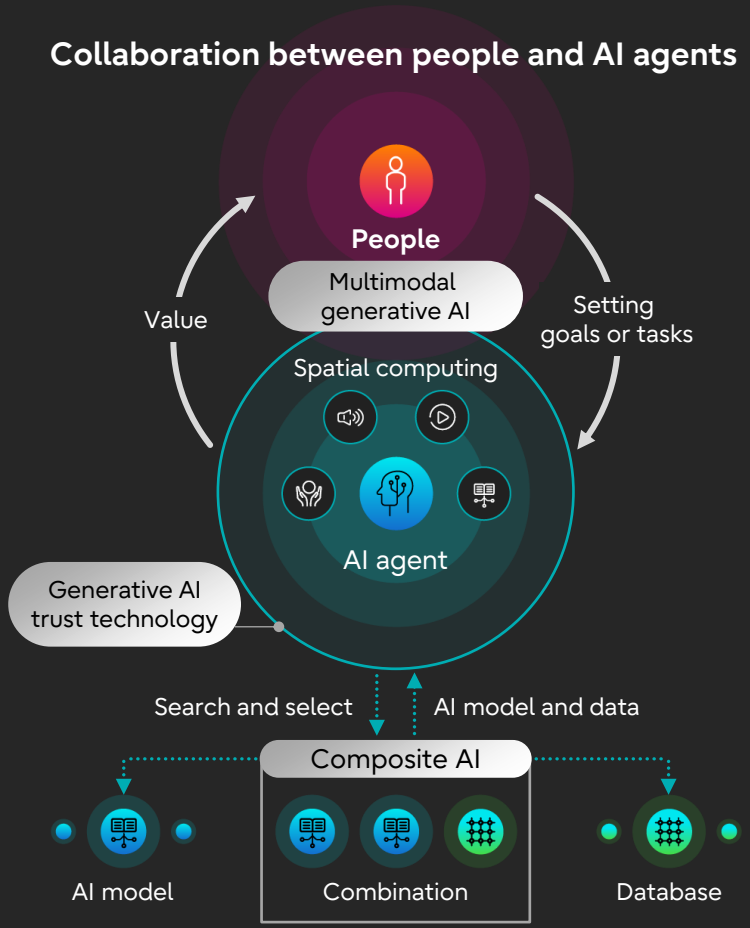
Multimodal generative AI technology estimates people's emotions and sensations, enabling natural communication. Combined with AI embodiment and spatial computing that interacts with the surrounding environment through sensors, this technology allows AI agents to understand people's goals and intentions, responding to challenges through cooperation with people.

2 | Composite AI technology

Composite AI technology selects and combines the most appropriate AI models and databases to meet specific goals defined by people. By using previously inaccessible specialized AI models and data, this stimulates human creativity, encouraging new ideas.

3 | Generative AI trust technology

Generative AI trust technologies can detect both disinformation and AI-generated hallucination. This ensures a safe environment in which to use the internal and external AI models and data provided by AI agents.



Redesigning business

Intelligence shared across organizational barriers accelerates innovation

AI agents will dramatically transform business processes and organizations. Departments within an organization will comprise people and AI agents, while organizations will shift from hierarchical structures to network structures in which departments can work together flexibly. Each department will enhance its expertise by working with AI agents. By using AI models that perform sophisticated simulations, people will formulate strategies and create new businesses.

By using multi-AI agents and collaborating with other departments to verify new strategies and business ideas, new approaches, products and services can be created quickly. Redesigning into a network-type organization where people and AI agents work together will accelerate strategy formulation and the introduction of new products and services in response to rapidly changing business conditions.

Future scenarios

Collating knowledge across organizations

Sarah, who leads the product planning team, used the new material developed by Lee to launch a new commercialization project. Her AI agent Liz used multi-AI agents to ask various departments to propose ideas. Liz identified the market potential of the new material for professionals based on requests for durability and recycling. Sarah can gather intelligence from across the organization to launch new business initiatives at an amazing speed.

AI computing driving business

The convergence of AI and computing will accelerate innovation through flexible collaboration within organizations and drive business transformation. The following three technologies are particularly important.

1 | Specialized AI agents

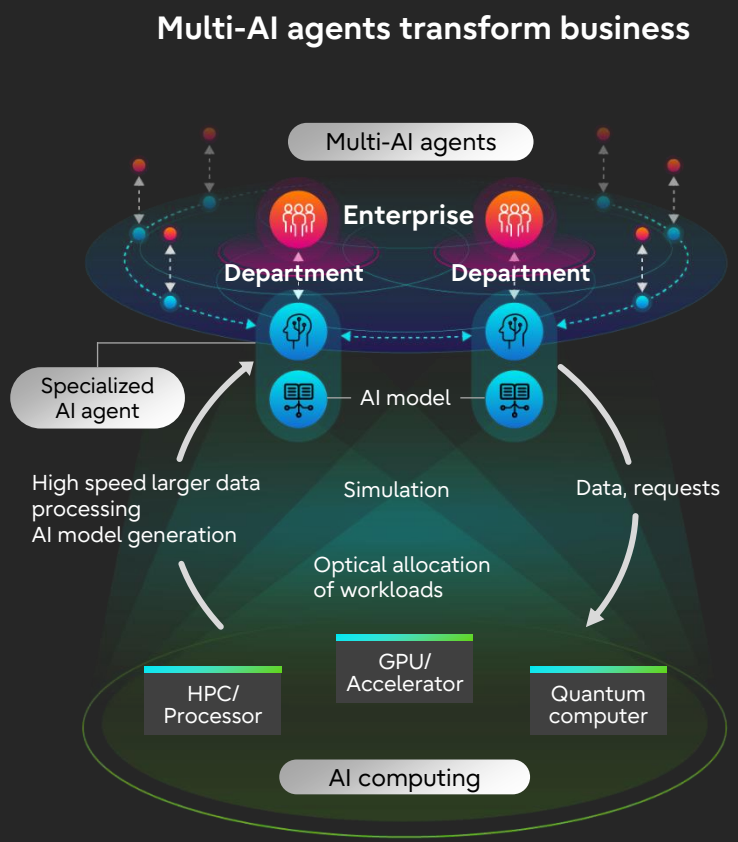
AI agents will evolve into specialized AI agents that incorporate specialized AI models with knowledge of specific analysis as well as business processes unique to each department, such as research and development, finance and human resources.

2 | Multi-AI agent technology

Multi-AI agent technology enables various specialized AI agents to collaborate autonomously. Through this network, AI agents that conduct scientific analysis, such as structural analysis, and AI agents that search for the best combination among multiple combinations, can work together to create new ideas and enable speedy validation.

3 | AI computing

To deploy and work with multiple AI agents, AI computing is required to support distributed, real-time, high-speed data processing. This provides optimal computing resources, simulations and AI models for specific workloads.

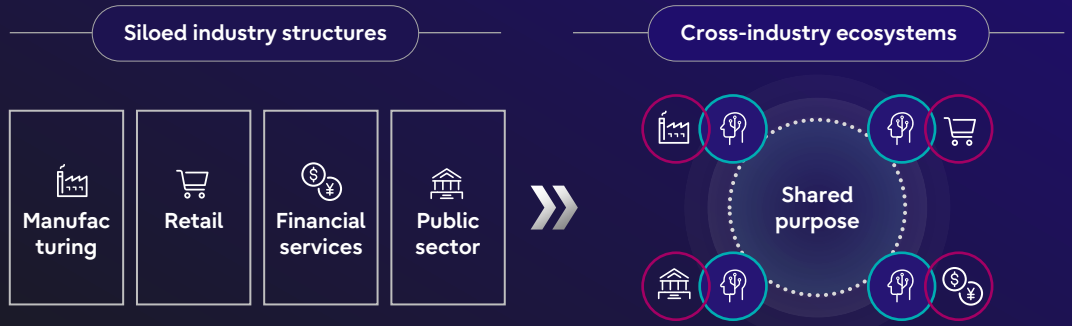


Contributing to net positive

Multi-AI agents form ecosystems across industries

In the future, AI agents will autonomously execute a wide range of transactions previously done by businesses and consumers, transforming the mechanisms for creating value for the environment and society. This evolution of AI agents will accelerate the shift from traditional vertical industrial structures to cross-industry ecosystems in which organizations work together to create social value based on a shared purpose.

In these ecosystems formed by multi-AI agents, data held by each organization and specialized AI models such as environmental and social simulations are shared to help solve complex societal challenges such as environmental issues, labor shortages and protecting social infrastructure. These ecosystems will drive growth for the participating organizations and create net positive value for society. This is our vision for regenerative ecosystems.



Future scenarios

Value creation through ecosystems

BioMaterials is growing an ecosystem to build a recycling-oriented business model centered on fiber materials. Data and AI models of each business are shared safely and securely. All players are collaborating via multi-AI agents, enabling them to simulate the entire life cycle of fiber materials. The AI models for environmental impact simulation are open to the public and are already being used jointly by various businesses and researchers to reduce environmental impact.

Technologies enabling ecosystems

The key enablers to solving societal challenges through cross-industry ecosystems are multi-stakeholder trust, AI security and rapid consensus building by using digital rehearsal technology.

1 | Digital trust

The evolution of digital trust ensures trust in the ecosystem. Technology to prove digital identity ensures the authenticity of ecosystem players, while technology to ensure data authenticity enables secure data sharing through data spaces[1].

2 | AI security technology

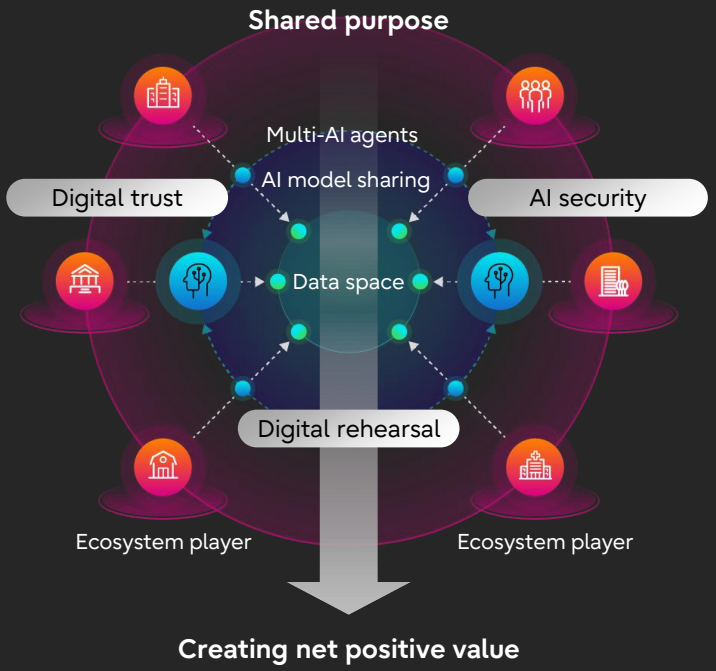
Technology to safely use AI (Security for AI) and technology to protect corporate systems and ecosystems from increasingly sophisticated cyber attacks (Security by AI) support the safe and secure use of AI and the sharing of AI models across ecosystems.

3 | Digital rehearsal

Multi-AI agents combine AI models shared by ecosystem players and pre-validate the effects and risks of measures and services. Digital rehearsals of such measures will help to envisage possible futures, facilitating consensus building among diverse stakeholders.

1) Data space: concepts and mechanisms for decentralized and secure data sharing between businesses while preserving data sovereignty.

Addressing societal challenges with ecosystems



Transformation across four areas for sustainable growth

So far, we've seen how people and evolving AI agents will transform people's lives, business and society to create value. As a transformation partner, Fujitsu will collaborate with our customers, enabling transformation by using technology.

We now introduce specific examples of how Fujitsu technology enables transformation and accelerates cross-industry initiatives in these four areas.

01 People

How do we create value through people-AI collaboration?

02 Business

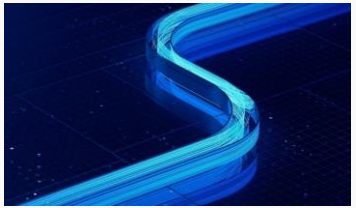
How do we realize the transformation to AI-driven organizations?

03 Society

How do we balance creating value for both business and society?

04 Technology

How do we create IT infrastructures that enable business transformation?



01 | Enhancing productivity through people-AI collaboration

Advances in AI will free people from routine tasks, allowing them to focus on more creative, higher value activities. To improve operational efficiency and employee satisfaction, organizations need to actively promote the use of AI by setting objectives, preparing data, introducing AI and embarking on full-scale use and continuous learning.

Fujitsu provides optimal technologies and services based on extensive experience and knowledge at each stage in the journey, ensuring end-to-end business processes are optimized successfully.

Our approach to AI implementation enables organizations to increase competitiveness and create new value. We select the most suitable AI technology for specific applications, providing the data conversion and expansion essential for successful AI utilization, while creating a secure AI environment.

As we enter the era of AI agents and multi-AI agents, Fujitsu will enable business growth and improved well-being through the continuous innovation of AI technologies and services.

AI introduction process using Fujitsu technologies and services

Process	Target setting	Data preparation	Introduction	AI utilization and continuous learning
Fujitsu technologies & services	**Small and large language model** ・Selecting the optimal approach	**Data expansion** ・Converting data into AI-friendly format	**AI agents** ・Selecting the right AI ・Creating a secure environment	

AI enabling forklift drivers to operate safely

Toyota Material Handling Japan

Toyota Material Handling Japan (TMHJ) and Fujitsu have combined TMHJ's logistics expertise with the Fujitsu Kozuchi AI service to develop Driving Video AI Analysis, which evaluates safe driving by analyzing forklift and operator movements. This speeds up the video checking process and increases the overall safety awareness of forklift operators.

02 | Enhancing decision-making with AI

In an uncertain business environment, organizations need to make fast, accurate management decisions. Decision Intelligence is the key to overcoming this challenge, consolidating data scattered across an organization and using AI to enhance decision-making. Decision Intelligence then models possible decisions, enabling AI agents to learn through continuous learning loops and ultimately aligning decision-making processes across the organization to ensure consistency.

Fujitsu Data Intelligence PaaS (DI PaaS) is a powerful tool for introducing Decision Intelligence. By combining advanced technologies, including AI, with a rich set of business templates in a single operating environment, organizations can quickly derive insights from data to solve complex customer challenges.

Fujitsu is helping organizations transform into AI-driven organizations, enabling Decision Intelligence through a dynamic combination of consulting services and DI PaaS.

The three elements of Decision Intelligence

1	**Modelling decisions**	Formalizing the decision-making process to ensure structure, documentation and reproducibility
2	**Optimizing decisions through feedback**	Using continuous learning loops to improve future decisions
3	**Orchestrating decision-making across the organization**	Proactively managing decision workflows, integrating them across enterprise-wide systems

DI PaaS - deriving insights from data

The screen shown in this promotional material is for demonstration purposes only, and all data presented is notional.
These screens may not fully reflect the features and capabilities of the final product.

Powered by Palantir Foundry

Creating a safe and secure society

Kansai Transmission and Distribution

Using Fujitsu Data Intelligence PaaS, Kansai Transmission and Distribution extracted power usage data from smart meters every 30 minutes, linking this with maintenance information to visualize the risks of equipment failure on a dashboard. This makes it possible to efficiently detect signs of equipment failures based on the linked information.

03 | Solving social challenges with ecosystems

Through Fujitsu Uvance, our business model to address social challenges, we're enabling data collaboration and co-creation with diverse, cross-industry partners. For example, we're demonstrating collaborative logistics using Fujitsu Unified Logistics to promote responsible supply chains and working with Paradigm Health to accelerate clinical trials.

To respond to social challenges, we need to exploit data from different industries. In recent years, the use of data spaces, which allow data to be shared and linked safely and efficiently, has increased.

Fujitsu's advanced trust technology is already helping to realize cross-industry data linkage. For example, we're leading projects to calculate product carbon footprints in accordance with global standards and estimate the effects of CO_2 reduction measures.

We'll continue to work with our partners to create new business models through ecosystems, helping to drive business growth and realize a more sustainable society.

Accelerating the response to cross-industry social challenges with partners

Digitizing clinical trials

Using Paradigm's clinical trial platform and Fujitsu's data infrastructure to improve the efficiency of clinical trial planning

Realizing the physical Internet

Standardizing logistics and commercial distribution data and helping to realize the physical Internet

Data standardization and collaboration

Participating in Catena-X, Europe's leading data space, and leading the trial to connect with Japan's Ouranos Ecosystem

Industry data linkage → Cross-industry data linkage

Improving cross-industry logistics efficiency

Sustainable Shared Transport

In May 2024, the Yamato Group established a new company, Sustainable Shared Transport (SST), to improve logistics efficiency across industry boundaries. SST started to operate an open platform for shared transport, based on a data sharing system developed with Fujitsu, helping to improve loading rates and reduce the burden on drivers.

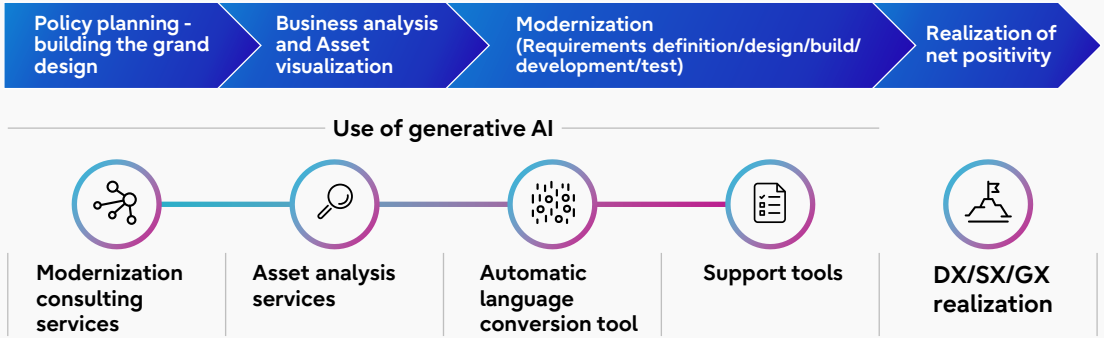
04 | IT platforms enhancing corporate competitiveness

Current technology infrastructures still present significant challenges, from complex and aging systems through to the lack of skilled resources to maintain and manage them. Indeed, there are many barriers to successful transformation, including existing black box systems, the initial investment required and the risk of failure.

Fujitsu enables IT infrastructure transformation through our extensive system design and build experience, supported by specialized engineers and comprehensive services spanning consulting to technology implementation. Together with our customers, Fujitsu designs 'To Be' and modernizes current systems to enable transformation and realize 3X[1].

1)Digital Transformation (DX), Sustainability Transformation (SX), Green Transformation (GX)

Fujitsu modernization services



AI-driven supply and demand forecasting

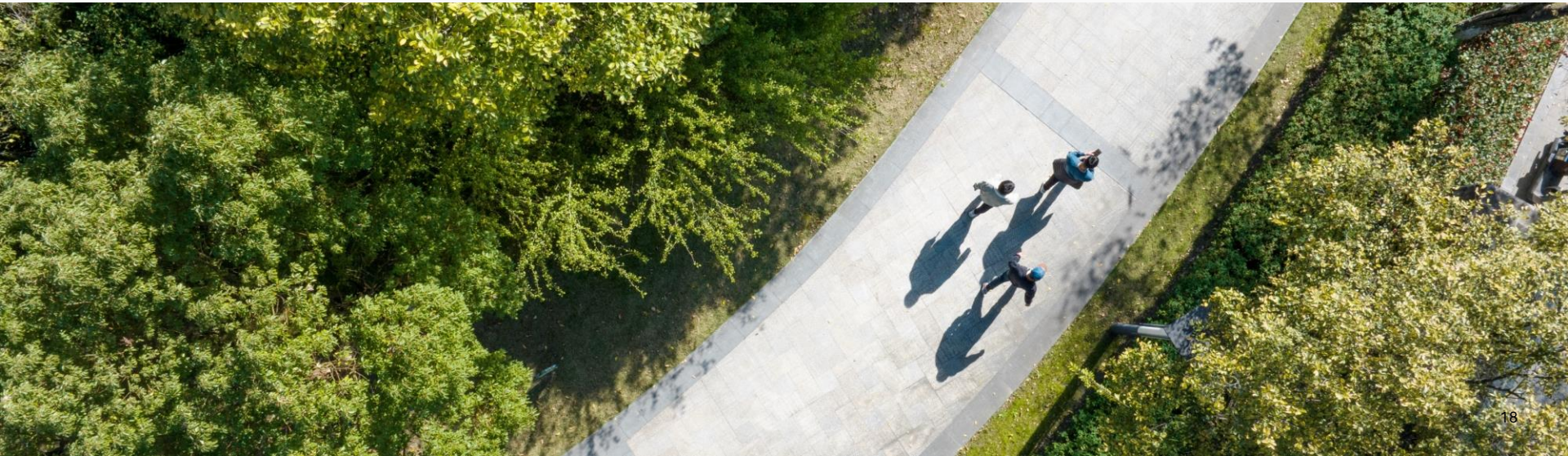
Marui Sangyo

Marui Sangyo, an organization focused on the development, manufacture and sales of construction materials, chose Fujitsu to implement modernization. Marui Sangyo and Fujitsu created an AI-based supply-demand planning system, standardized operational flows and co-created a system synchronized with real operational processes to create an environment that can respond to change.

Fujitsu - working together as your transformation partner

As a transformation partner, Fujitsu will continue to help organizations achieve successful corporate transformation in all areas, from technology to consulting, services and modernization. Our consulting organization, Uvance Wayfinders, is helping customers to formulate strategies and concepts that realize a net positive society and address complex challenges across people, business and society.

Evolving AI and other technologies have enormous potential as a driving force to change the world for the better. By working together, we'll create new value through the collaboration of people and AI, transforming the future by regenerating the environment and society combined with driving business growth.



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Future Forecasts, Forecasts and Plans

This booklet contains forward-looking statements as well as past and present facts about the Fujitsu group. These statements are based on information available at the time of writing and contain uncertainties. Therefore, the results of future business activities and events that may occur in the future may differ from those described in this booklet, but the Fujitsu group assumes no responsibility for such events. We ask our readers to be aware of the above.

June 2025