

JAPAN × INDIA
A STRONGER TOMORROW TOGETHER

IDEAS
PEOPLE
PARTNERSHIP
REAL IMPACT

Japan × India

Technology Partnership

Building What Comes Next.

Yokohama India Center
SEPTEMBER 2026

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Agenda

Japan × India — Technology Partnership

From global shifts to practical collaboration.

01

THE SHIFT

Why technology competitiveness is changing.

02

THE GAP

Why capability and speed matter for Japan.

03

THE OPPORTUNITY

Why India — and why Japan × India.

04

THE ACTION

How to turn the opportunity into capability.

SECTION 01

THE SHIFT

What is changing in technology,
and why AI is moving beyond software
into engineering and the physical world.

*Different
Strengths.
A Shared
Future.*



01
First, The Shift

What is changing in technology, and why AI is moving beyond software into engineering and the physical world.



02
The Gap

What this means for Japan, particularly in terms of technology capability and speed.



03
The Opportunity

Why India is becoming increasingly relevant, and how Japan and India can bring complementary capabilities together.



04
The Action

How to move from opportunity to impact: start with a real business problem, build the right capability, and scale what works.

JAPAN × INDIA
BUILDING A SMARTER
TOMORROW

The technology race is *changing*.

AI is moving from a digital tool to an industrial capability.



88%

of organizations
use AI in 2025



2.7%

gap between U.S. and
Chinese AI models



54%

of global industrial robot
installations were in China
in 2024



AI MODELS

Foundation models



SOFTWARE & AGENTS

Applications, agents



ROBOTICS & PHYSICAL AI

Control systems, simulation



REAL-WORLD IMPACT

Factories, mobility, services

FROM
INTELLIGENCE
TO A BRIGHTER
TOMORROW

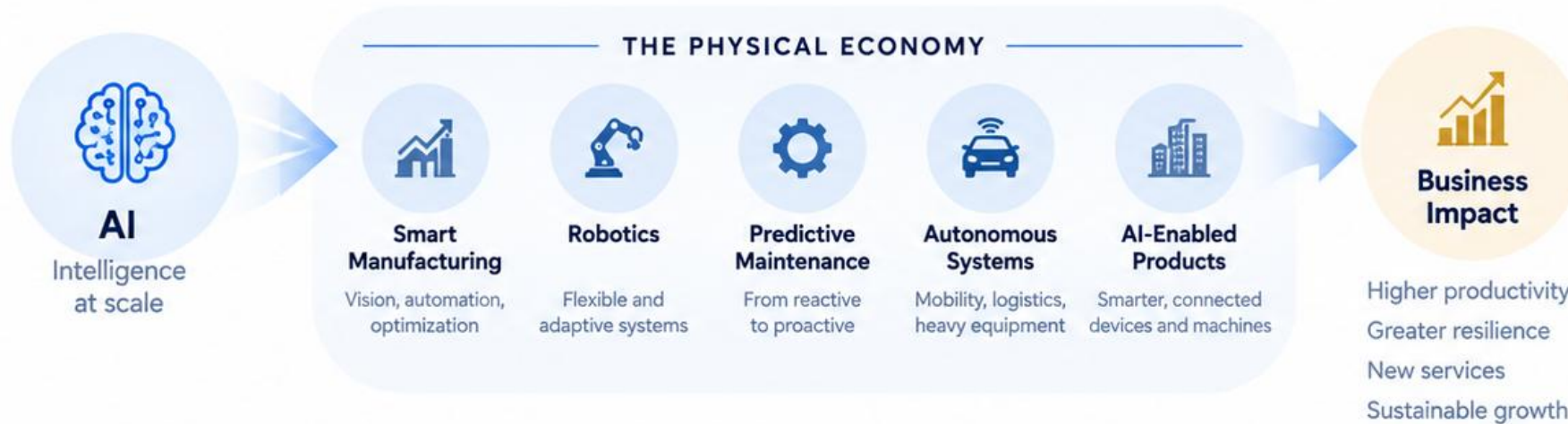


The focus is shifting from who uses AI to who can turn AI into *real-world capability*.

AI Is Moving Into the Physical Economy.

The next wave of AI will increasingly operate where the physical economy operates.

PEOPLE
TECHNOLOGY
OPPORTUNITY
REAL IMPACT



AI is moving from the screen into the systems that run *the physical economy*.

The Global Race Is Accelerating.

Competition is increasingly about ecosystems — not just individual AI models.

PEOPLE
TECHNOLOGY
OPPORTUNITY
REAL IMPACT

ECOSYSTEM CAPABILITY

DIFFERENT STRENGTHS. A MORE CONNECTED WORLD.



U.S.

FRONTIER INNOVATION
AT SCALE



Frontier AI

Leading model development



Capital

Highest private AI investment



Compute

World-class infrastructure



Global talent

Attracts top talent worldwide

IDEAS TO GLOBAL PLATFORMS



CHINA

RESEARCH TO
REAL-WORLD SCALE



AI research

Highest publication volume,
citations and patent grants



Manufacturing

World-scale industrial base



Robotics

Leads industrial robot installations



Deployment scale

Rapid adoption across industries

RESEARCH TO MASS DEPLOYMENT



JAPAN

INDUSTRIAL STRENGTH
AND TRUST



Industrial base

Advanced manufacturing



Robotics

Global leadership and expertise



Engineering

Precision, quality and systems know-how



Real-world data

Rich operational environments

PHYSICAL-WORLD EXCELLENCE



INDIA

TECHNOLOGY CAPABILITY
AT SCALE



Software

Global product and enterprise capability



AI & data

Growing AI talent and innovation



Engineering

Deep engineering and ER&D capability



Technology talent

Large, young and globally connected

TALENT TO GLOBAL IMPACT

KEY FACTS

(Stanford HAI AI Index 2026)



59 vs 35

U.S. produced 59 notable AI models
in 2025 vs 35 for China.



China led

in publication volume,
citations and patent grants.



54%

of global industrial robot
installations were in China in 2024



\$285.9B vs \$12.4B

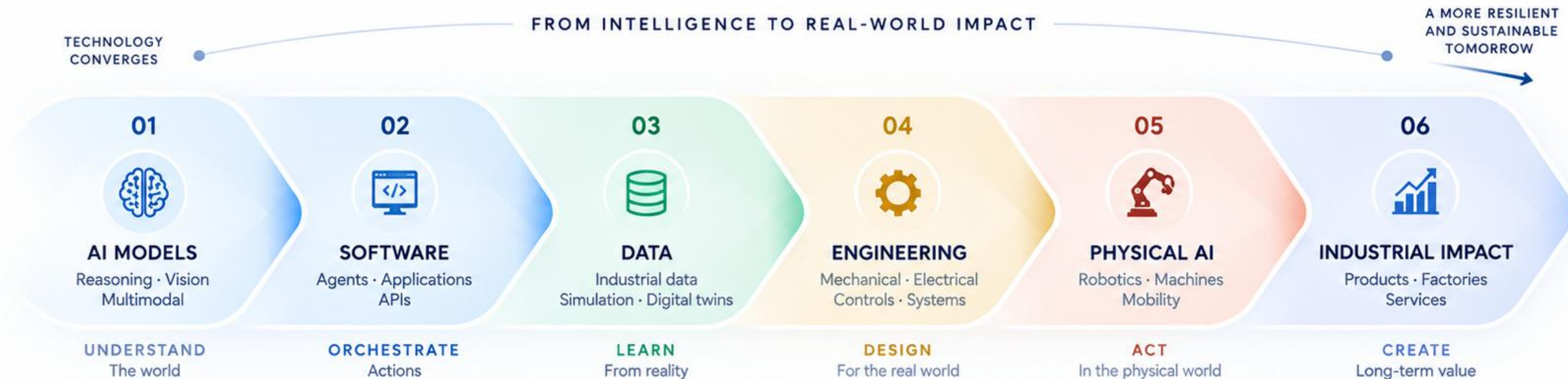
U.S. private AI investment in 2025
vs China.



The competitive unit is becoming the ecosystem — *models + capital + talent + manufacturing + deployment.*

The Next Frontier Is Multidisciplinary.

The next generation of industrial capability sits at the intersection of AI, software, data and engineering.



AI alone is not the capability.

Value emerges when intelligence meets *domain expertise, engineering and the physical world.*



The competitive advantage is not one technology — *it is the system that connects them.*

JAPAN × INDIA

A STRONGER TOMORROW TOGETHER

SECTION 02

THE GAP

What this changing technology landscape means for Japan — and how both countries can achieve more together.

DIFFERENT
STRENGTHS.
A BIGGER
OPPORTUNITY.



01
The Shift



02
The Gap



03
The Opportunity



04
The Action



Japan Has the Assets — *But the Clock Is Moving.*

Japan already has the physical-world foundation. The challenge is connecting it to new technology capability quickly.

JAPAN'S FOUNDATION

World-class industrial strengths



Manufacturing

Deep industrial know-how



Robotics

Global leadership in automation



Engineering

Precision, quality and systems expertise



Real-world data

Rich operational environments

NEW TECHNOLOGY LAYER

Extending Japan's strengths



AI

Models and reasoning



Software

Applications and agents



Data

Industrial data and simulation



Physical AI

Robotics, control and autonomy

FROM
STRENGTH
TO GREATER
POSSIBILITIES

NEXT-GENERATION INDUSTRIAL CAPABILITY

Higher productivity. New value.



Smart factories

AI-driven, resilient operations



Intelligent products

Connected, smarter machines



Autonomous systems

Mobility, logistics and infrastructure



New services

Data-enabled businesses



85.1%

of Japanese companies reported a shortage of personnel to drive DX.

IPA — DX Trend 2025



The opportunity is clear — but the clock is moving.



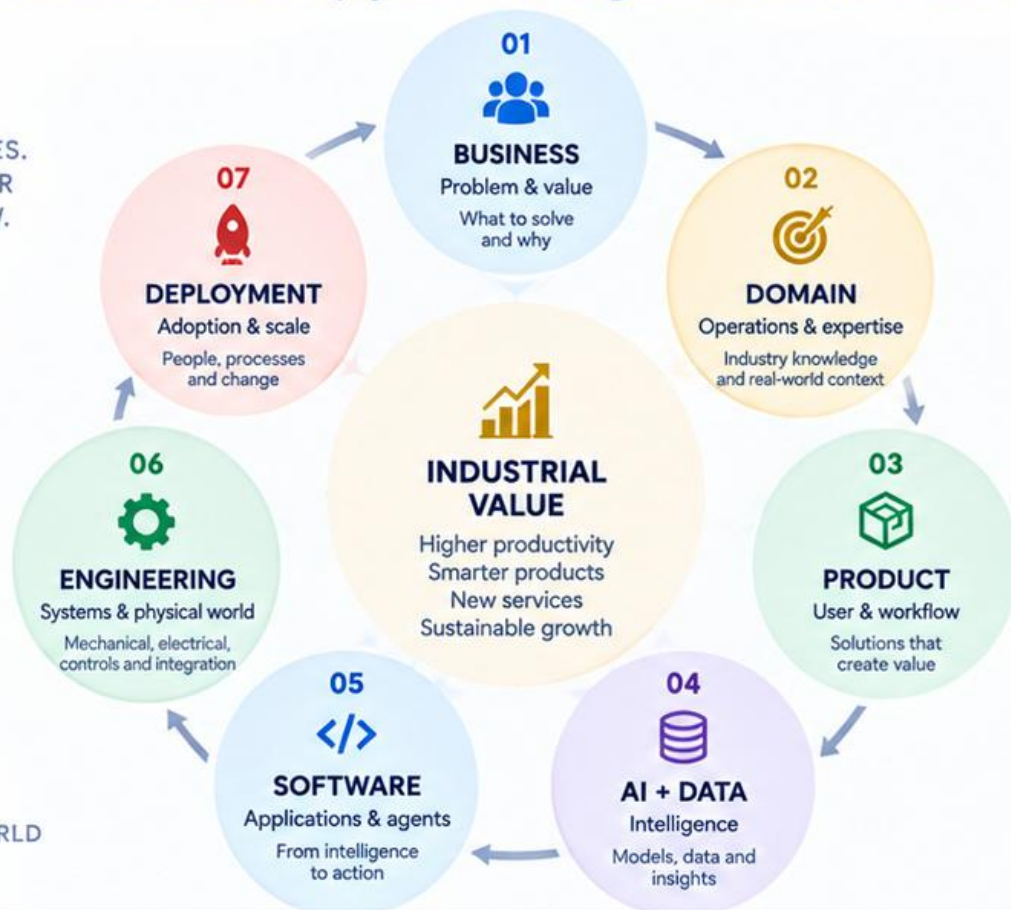
Japan does not need to replace its industrial strengths.

It needs to **connect them to new technology capability — faster.**

The Constraint Is Capability — Not Just AI Talent.

The requirement is not simply more AI engineers; it is multidisciplinary capability around business problems.

DIFFERENT
CAPABILITIES.
A STRONGER
TOMORROW.



FROM
CAPABILITY
TO REAL-WORLD
IMPACT.



The winning unit is the
multidisciplinary team.

Business + Domain + AI + Software + Engineering

EVIDENCE: JAPANESE COMPANY SURVEY

Top categories identified as insufficient DX talent
(Multiple responses, n = 713)

IPA — DX Trend 2024

41.9%
Business Architects
Most cited as insufficient talent category

19.1%
Data Scientists
Identified as insufficient talent category

12.2%
Software Engineers
Identified as insufficient talent category



The bottleneck is not one missing skill — *it is the ability to connect the skills around a business problem.*

The Gap Is Between Technology Potential and Execution Speed.

Japan's challenge is not access to technology — it is connecting technology, data, people and existing systems fast enough to create business impact.

HIGH TECHNOLOGY POTENTIAL

A strong foundation to build on.



KEY BARRIERS TO SPEED

From potential to real-world impact.



Talent & Capability

Not enough multidisciplinary DX capability.

01



Legacy & Data

Existing systems and fragmented data can slow adoption.

02



From Pilot to Scale

Moving from experimentation to systematic business deployment remains difficult.

03

REAL BUSINESS IMPACT

Next-generation industrial capability.



Higher productivity



New products & services



Greater resilience



Sustainable growth



85.1%

of Japanese companies reported a shortage of personnel to drive DX.

IPA — DX Trend 2025



Legacy systems

remain a key obstacle to DX.

METI — 2025



GenAI adoption is growing,

but systematic use and business transformation remain limited.

METI — 2024



The opportunity is real — *but the window is narrowing.*

JAPAN × INDIA

A STRONGER TOMORROW TOGETHER

SECTION 03

THE OPPORTUNITY

Why India is becoming increasingly relevant —
and how Japan and India can bring complementary
capabilities together.

01
The Shift

02
The Gap

03
The Opportunity

04
The Action

If capability is the constraint — *where can we extend it?*

Not just by hiring more people.
By accessing capability beyond the local talent pool.



JAPAN



Business context



Customer understanding



Leadership



COMPLEMENTARY
STRENGTHS



INDIA



Technology talent



Engineering



AI · Data · Scale

Japan × India — extending technology capability.

JAPAN × INDIA
TECHNOLOGY CAPABILITY

India is becoming a global *technology capability hub*.

Not just AI talent — a broader ecosystem across software, data, engineering and R&D.



1,760+

SOURCE: NASSCOM, 2025

Global Capability Centers in India

~2 million professionals

PART 3

01



AI & DATA

AI/ML · Data Engineering
Analytics

600 – 650K AI talent pool
→ **1.25M+** projected by 2027

SOURCE: NASSCOM / DELOITTE, 2024

02



SOFTWARE

Product Engineering
Cloud · Platforms

BUILD
DIGITAL PRODUCTS
FOR A GLOBAL WORLD

03



ENGINEERING & R&D

Product R&D · Embedded
Deep Tech

SOLVE COMPLEX PROBLEMS
BUILD WHAT'S NEXT

TALENT
IDEAS
INNOVATION
IMPACT

FROM INDIA
FOR A BRIGHTER
TOMORROW

PEOPLE
PARTNERSHIP
PROGRESS

A STRONGER
TOMORROW
TOGETHER

The opportunity is **access to capability** — not simply access to headcount.

JAPAN × INDIA
TECHNOLOGY FOR A BRIGHTER TOMORROW

From hiring talent *to accessing capability.*

It's a shift from job titles to solving business problems.

TALENT MINDSET

“Can I hire
50 engineers
in India?”



Focus on headcount.
Narrower view. Tactical solution.



A BROADER
WAY TO THINK

CAPABILITY MINDSET

“Can I access a broader
technology capability
from India?”



AI
& Data



Software
Engineering



Engineering
& R&D



Product
Development



Scale
& Innovation

Focus on solving business problems.
Broader view. Strategic partnership.

DIFFERENT
STRENGTHS.
A BRIGHTER
TOMORROW
TOGETHER.

Think beyond headcount.
Access capability. Build what's next.

JAPAN × INDIA
STRONGER TOGETHER

India has the capability — *and the world is competing for access to it.*

Technology talent is increasingly a global market.

TALENT
CONNECTS
OPPORTUNITIES
BUILDS
TOMORROW



GLOBAL
TALENT
STRONGER
TOGETHER



Japan–India Action Plan

50,000

skilled personnel from India to Japan
over 5 years.

SOURCE: MOFA, Japan–India Action Plan, 2025



CBRE Global Tech Talent Guidebook 2025:

AI-development talent concentrated in the U.S. and India;
Bengaluru among the largest AI-development markets.

PEOPLE × TECHNOLOGY × OPPORTUNITY

JAPAN × INDIA
A BRIGHTER TOMORROW TOGETHER

JAPAN × INDIA

A STRONGER TOMORROW TOGETHER

PEOPLE
TECHNOLOGY
OPPORTUNITY
REAL IMPACT

SECTION 04

THE ACTION

How to move from opportunity
to impact — together.

REAL
SOLUTIONS
BRIGHTER
TOMORROWS



01
The Shift



02
The Gap



03
The Opportunity



04
The Action

Multiple ways to access *technology capability from India.*

Choose the operating model that fits your goals, needs and pace.

01



Hire in Japan

Bring Indian talent to work in Japan



CLOSE COLLABORATION
AND INTEGRATION

02



GCC in India

Set up your own Global Capability Center



LONG-TERM CAPABILITY
BUILDING

03



Work with a Partner

Engage a trusted technology partner



SPEED AND
FLEXIBILITY

04



Project-based Teams

Build dedicated teams for specific initiatives



FOCUSED EXECUTION
AND SCALE

05



Hybrid Models

Combine onshore, offshore and partners



FLEXIBLE, RESILIENT
AND FUTURE-READY

DIFFERENT
PATHS.
A STRONGER
TOMORROW
TOGETHER.



PEOPLE
CAPABILITY
OPPORTUNITY



It's not one model — it's **the right model** for your ambition.

JAPAN × INDIA
BUILD TOGETHER

Which model is right *for your goals?*

Different needs. Different paths. A common opportunity.

PEOPLE
CAPABILITY
OPPORTUNITY
A BRIGHTER
TOMORROW
TOGETHER.

	 Hire in Japan Bring Indian talent to work in Japan	 GCC in India Set up your own Global Capability Center	 Work with a Partner Engage a trusted technology partner	 Project-based Teams Build dedicated teams for specific initiatives	 Hybrid Models Combine onshore, offshore and partners
 Best for	Close collaboration and business alignment	Long-term capability and scale	Speed, access to expertise	Focused initiatives and quick execution	Flexibility and long-term growth
 Typical use cases	Key roles, client-facing, bilingual needs	Product development, R&D, AI, data, core engineering	End-to-end development, specialized skills (AI, cloud, embedded, etc.)	Specific projects (e.g. AI pilot, platform development, modernization)	Combination of the above
 Speed to start	Medium	Slower	Fast	Fast	Medium
 Control & ownership	High	High	Medium	Medium	High
 Scalability	Limited	High	High	Medium	High
 Typical cost structure	Higher	Lower over time	Variable (project/retainer)	Project-based	Optimized
 Key advantage	Deep integration with Japan business	Build your own strategic capability	Access to proven capability and talent	Deliver outcomes quickly	Best of both worlds

KEY TAKEAWAY

There is no *one-size-fits-all* model.

The right model depends on your goals, timeline, control needs and long-term ambition.



START
FOCUSED



LEARN
WHAT WORKS



SCALE
WITH CONFIDENCE



JAPAN × INDIA
DIFFERENT STRENGTHS. A BRIGHTER TOMORROW TOGETHER.

What should we build where?

A Japan × India capability architecture.

Combine the strengths of both countries to create a stronger, more competitive organization.

PEOPLE
TECHNOLOGY
OPPORTUNITY
A BRIGHTER
TOMORROW
TOGETHER.



You don't have to *build it all at once*.

Start with a focused initiative, prove the value, and then scale.

SMALL
STEPS
BIG
OPPORTUNITIES
A BRIGHTER
TOMORROW
TOGETHER.



ONE PROBLEM

Pick a specific business challenge or use case.



ONE TEAM

Start with a small, focused team across Japan and India.



ONE PROOF POINT

Deliver measurable outcomes and learn what works.



Start small. Prove value. **Then scale.**

REAL PROGRESS HAPPENS STEP BY STEP.



Different beginnings. A **brighter future together.**

JAPAN × INDIA
BUILD TOGETHER



JAPAN x INDIA TECHNOLOGY NETWORK

Thank You

LET'S BUILD A STRONGER TOMORROW



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