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WORLD ECONOMIC FORUM

Industries in the Intelligent Age

Asia's Human-led AI Opportunity: A Framework for Transformation

WHITE PAPER

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Reading guide

The World Economic Forum's AI Transformation of Industries initiative seeks to catalyse responsible industry transformation across industries and society. It advances understanding of AI's impact on business and society while actively accelerating practical implementation through leadership convening, ecosystem collaboration and the scaling of real-world solutions.

A central pillar of the initiative is MINDS (Meaningful, Intelligent, Novel and Deployable Solutions), a programme that recognizes and showcases real-world AI deployments delivering scalable, inclusive impact across sectors.

This white paper series examines the transformative role of AI across industries, combining cross-industry analysis with in-depth sectoral and regional perspectives.

Building on last year's foundational assessment of AI's state of development, strategic potential and emerging opportunities, this year's series shifts from what is possible to what is required. The focus moves decisively towards operationalization, highlighting the actions organizations could take to move from experimentation to enterprise-wide implementation.

Each paper offers a practical, executive-level view of what transformation looks like on the ground, drawing on real-world case studies, leading practices and emerging data from across industries. While each paper is standalone, common themes emerge: new operating models, evolving roles of leadership, human-AI collaboration, and the growing importance of AI governance and orchestration.

As AI adoption accelerates, this series aims to equip leaders with the insights, capabilities and decision frameworks required to build competitive, responsible and future-ready AI-enabled organizations.

Together, these papers offer a comprehensive view of AI's current development and adoption, as well as a view of its future potential impact. Each paper can be read standalone or alongside the others, with common themes emerging across industries.

Cross industry

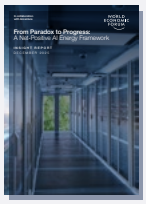
Impact on industrial ecosystems



Organizational Transformation in the Age of AI: How Organizations Maximize AI's Potential



AI in Action: Beyond Experimentation to Transform Industry



From Paradox to Progress: A Net-Positive AI Energy Framework



Artificial Intelligence and Cybersecurity: Balancing Risks and Rewards

Regional specific

Impact on regions



Asia's Human-led AI Opportunity: A Framework for Transformation

Industry or function specific

Impact on industries, sectors and functions

Advanced manufacturing and supply chains



Intelligent Industrial Operations Outlook 2026

Consumer goods



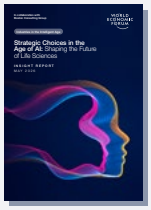
Unlocking AI Value at Scale: Workforce Adoption A Practical Guide for Consumer Industries

Healthcare



The Future of AI-Enabled Health: Leading the Way

Life science



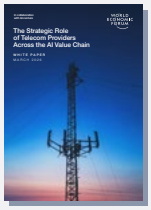
Strategic Choices in the Age of AI Shaping the Future of Life Sciences

Media, entertainment and sport



Artificiall ntelligence in Media, Entertainment and Sport

Telecommunications



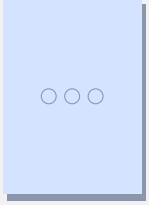
The Strategic Role of Telecom Providers Across the AI Value Chain

Transport



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Foreword



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Artificial intelligence (AI) promises to be the transformative technology of a generation.

In boardrooms, it can sharpen decisions, accelerate innovation and help leaders find new paths to growth. On factory floors and in service operations, it can reduce friction, improve quality and make work more productive, adaptive and resilient.

For governments, it offers the potential to strengthen public services, upgrade industries and support more inclusive economic development.

Across these settings, AI is more than a tool for efficiency; it is becoming a force that can reshape how value is created and how societies prosper. But whether that promise is realized rests on a fundamental assumption: that AI transformation is human-led.

Organizations, ecosystems and countries increasingly recognize that AI cannot be treated only as a technology deployment challenge. They know the stakes are broader: how work changes, how trust is built, how institutions adapt and how the gains are shared. The *why* is clear; the harder question is *how* to put this into practice.

This question is especially important in Asia. The region's diversity, scale and dynamism make it one of the most important arenas in which AI's future is being shaped. Different economies move at different speeds and from different starting points. Yet, many confront the same underlying challenge: ensuring that technological progress translates into better outcomes for people, organizations and society.

This report traces how human-led AI transformation is beginning to take shape across Asia, where it is gaining traction, where barriers remain and what practical lessons are emerging – lessons that matter not only for Asia, but for the world, proving that the most powerful thing about AI is not the technology itself, rather the human potential it unlocks.

Executive summary

As artificial intelligence (AI) capabilities evolve from generative AI to agentic AI, adoption is no longer confined to pilot projects or isolated productivity improvements. Across the globe, AI is increasingly embedded into core operations, workflows and decision-making processes. In China, products such as OpenClaw have moved rapidly from tech-community experimentation into the public spotlight.

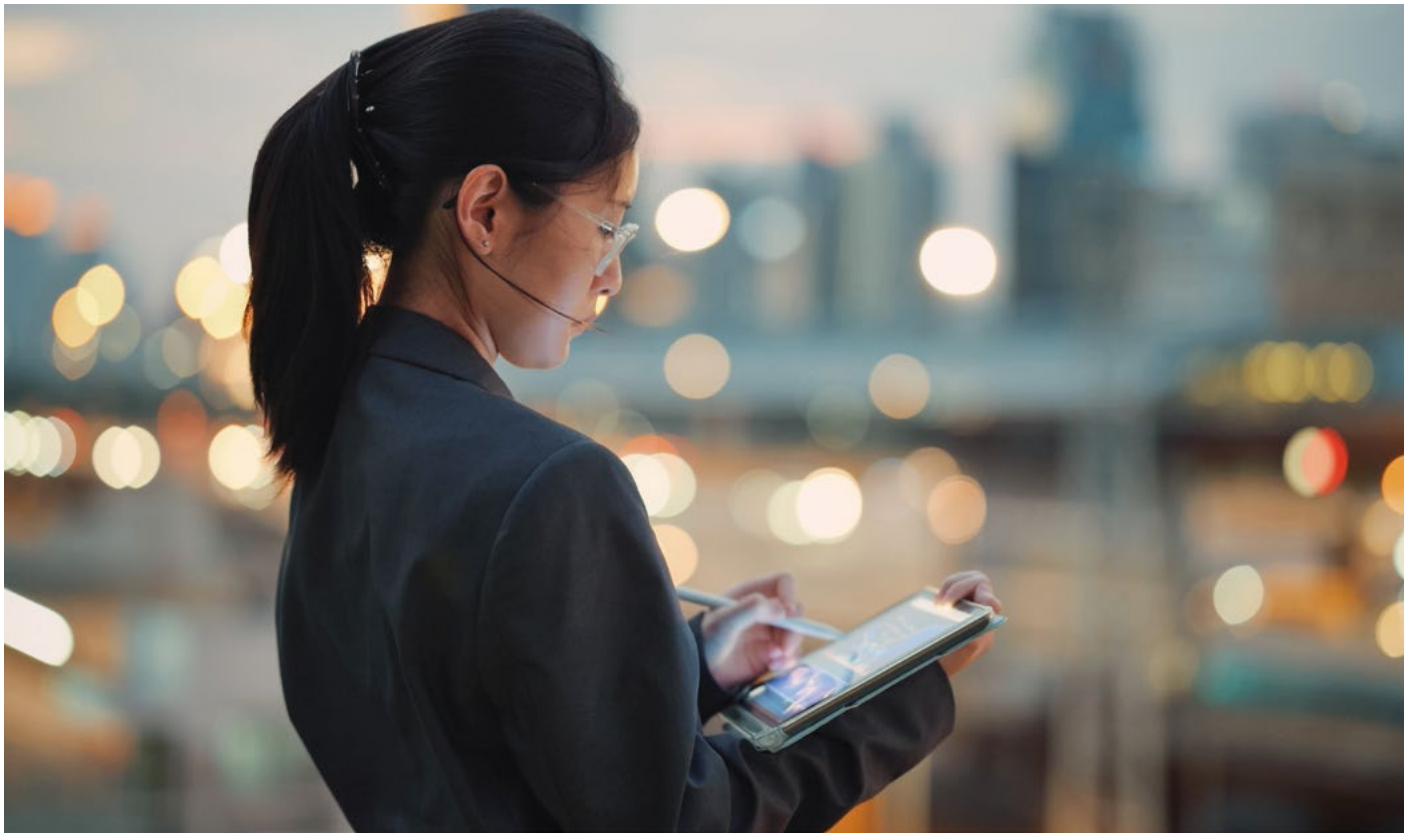
Yet wider adoption and more autonomous deployment have not consistently translated into durable value. This paper argues that the main bottleneck is the widening gap between what AI systems can do and the pace at which human systems adapt. The more consequential question is therefore not whether AI is being adopted but whether human roles – direction, judgement and accountability – are being deliberately reorganized to keep pace with technical capability.

Seen this way, the human role in AI transformation is easily misunderstood. It does not mean involving humans in every task, nor does it rest on a generic appeal to "human-centricity". Human-led AI (HLAI) transformation refers to the functions that remain non-delegable as AI scales, including setting directions, keeping judgement and holding accountability. The importance of humans lies not in resisting automation, but in ensuring that the transition to new operating models is driven by deliberate human intent – not by deployment momentum alone.

Asia is a critical testbed for this transformation, combining industrial scale, demographic diversity, strong policy involvement and rapid real-world deployment. Some economies are advancing through broad, system-wide acceleration; others through sequenced integration as well as through opportunity-driven expansion focused on priority sectors or enabling digital rails.

Building on the World Economic Forum reports *Blueprint to Action: China's Path to AI-Powered Industry Transformation* and *Organizational Transformation in the Age of AI: How Organizations Maximize AI's Potential*, this white paper advances a practical framework for HLAI transformation. It moves beyond a narrow focus on human presence in individual processes to address how direction, judgement and accountability are structured around human roles across systems. The framework provides an architecture for exercising these responsibilities at organizational, ecosystem and regional levels.

Our message is straightforward: the future of AI transformation in Asia will be determined less by model capability than by whether human systems can be deliberately reorganized to enable AI to be deeply embedded and scaled.



Introduction

Artificial intelligence is moving from isolated pilots to core operational deployment across industries. While 77% of organizations adopt advanced AI, fewer than one-third report achieving widespread and sustained value from their initiatives.[1] This gap reveals that large-scale deployment does not automatically translate into system-wide impact.

In earlier phases of adoption, the central question was what to use AI for. Now, as adoption accelerates and reaches more people than ever,[2] the more pressing question is whether organizations can govern it fast enough for that capability to translate into durable value. The bottleneck is no longer model capability alone, but the widening gap between the pace of AI advancement and the readiness of human systems to adapt.

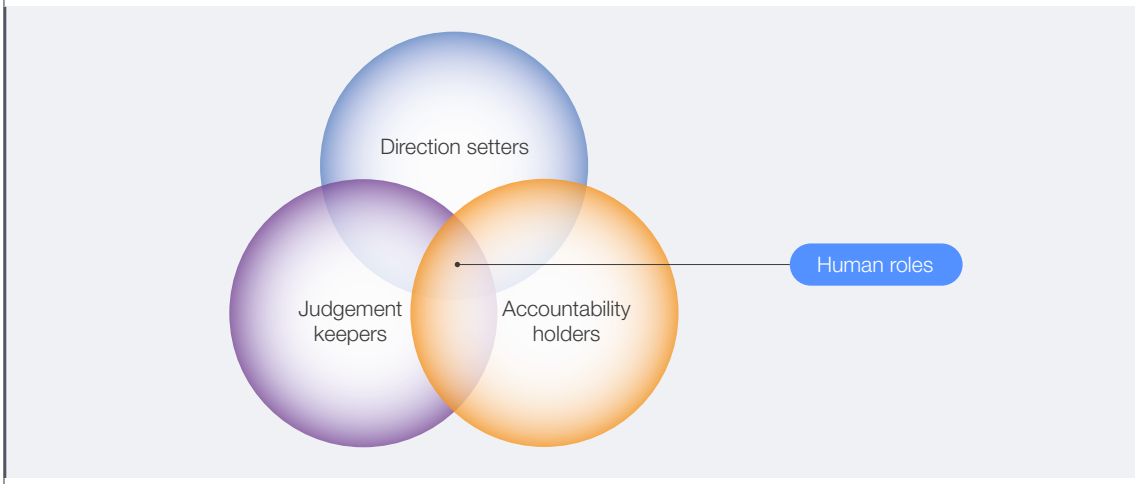
That gap becomes more consequential as agentic systems and orchestration layers begin to act and not just respond, a development characterized as a move from "augmentation" to "co-intelligence".[3] This shift makes it even more critical that people continue to define the objectives, boundaries, responsibilities and adaptive conditions within which AI operates.

This is why human-led AI (HLAI) transformation is necessary for the next phase of adoption. HLAI is not about placing people into every AI-enabled task, nor simply designing AI around human preferences. What distinguishes it is a focus on transformation rather than intervention: deliberately redesigning the human system around AI as it becomes embedded in core operations and decision-making.

HLAI transformation refers to a purpose-driven redesign of strategy, processes and organizational structures in which humans act as:

- **Direction setters**: defining the strategic objectives, value priorities and boundaries within which AI operates – shaping not just where it is applied, but what it is designed to serve.
- **Judgement keepers**: embedding human reasoning at the decision points where context, risk and consequence cannot be fully specified in advance – and holding the line where it should not expand.
- **Accountability holders**: ensuring that someone remains genuinely answerable for outcomes – concentrating responsibility where it can be exercised and enforced, not diffusing it across systems.

FIGURE 1 **Human roles**



HLAI begins with intent – defining the outcomes that matter, the decisions that must improve and the capabilities that need to be strengthened. These choices set the direction of transformation. They determine not only where AI is applied, but how the organization itself must change to realize value.[4]

Critically, this redesign does not stop at the level of the firm boundary. Because value creation increasingly spans interconnected systems, scaling AI also depends on how organizations align with partners, labour markets and institutional environments. Without this broader alignment, AI remains locally effective but systemically fragmented, and the gap between deployment and durable value persists.

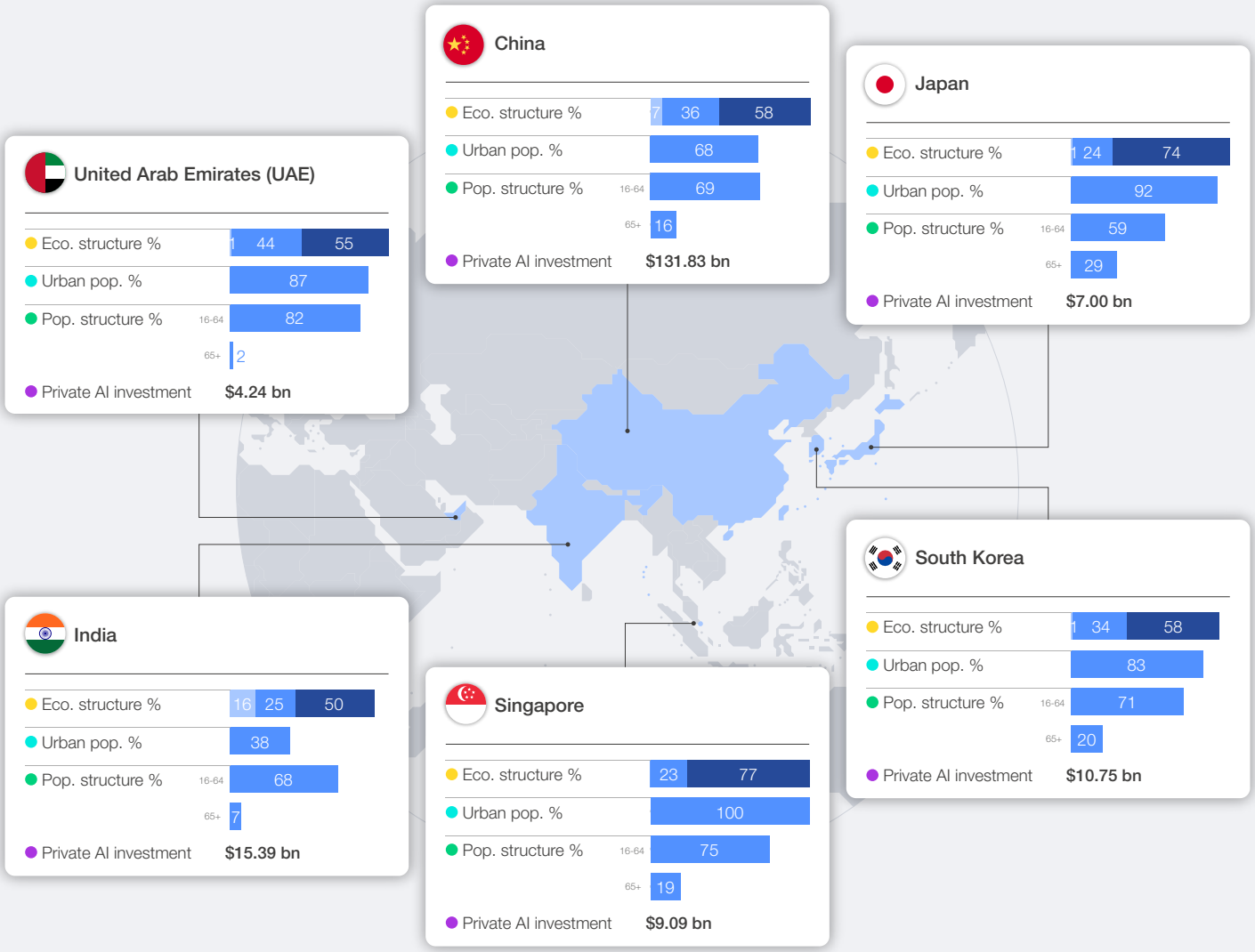
Human-in-the-lead in this context is not an ethical add-on to AI deployment, nor a brake on technological ambition, but the structural condition for sustainable scale. Only deliberate human-led redesign can convert that capacity into reliable business impact, workforce resilience and long-term competitiveness.

1 Asia's AI opportunity: dynamism, reality and possibilities

Systemic AI transformation is emerging most visibly in Asia, reflecting a combination of structural conditions: industrial scale, demographic divergence, varied economic structures and uneven but significant private AI investment (see Figure 2).[5]

Together, these make Asia not simply a region of rapid adoption, but a valuable testbed for observing how different systems adopt, adapt and scale AI under real-world constraints.

FIGURE 2 **Socioeconomic and AI investment landscape in selected Asian economies**



Note: China's figures are as of 2025. The share of population aged 65 and above is reported as of 2025 for all countries except the UAE. India's working-age population (aged 16–64, as a percentage of total population) reflects 2025 data.

Private AI investment refers to private financing (e.g., VC, PE) in AI companies with over $1.5 million in funding.

Source: World Bank; United Nations; IMF; Stanford HAI; National Bureau of Statistics of China; Statistics Bureau of China.

Two characteristics distinguish the region:

Scale, complexity and industrial AI deployment

Asia combines scale with operational capability in ways few other regions do, hosting some of the world's most tightly integrated industrial and supply chain systems. China, for example, is the only country in the world to cover all industrial categories in the UN classification system. For many economies, integration into global value chains is mediated primarily through regional production networks rather than direct global sourcing. In some cases, more than 70% of this upstream integration is regional.[6] In such environments, AI deployment does not remain localized – decisions in one node cascade rapidly across multiple actors and sectors, enabling system-wide value creation at scale that few other regions can match.

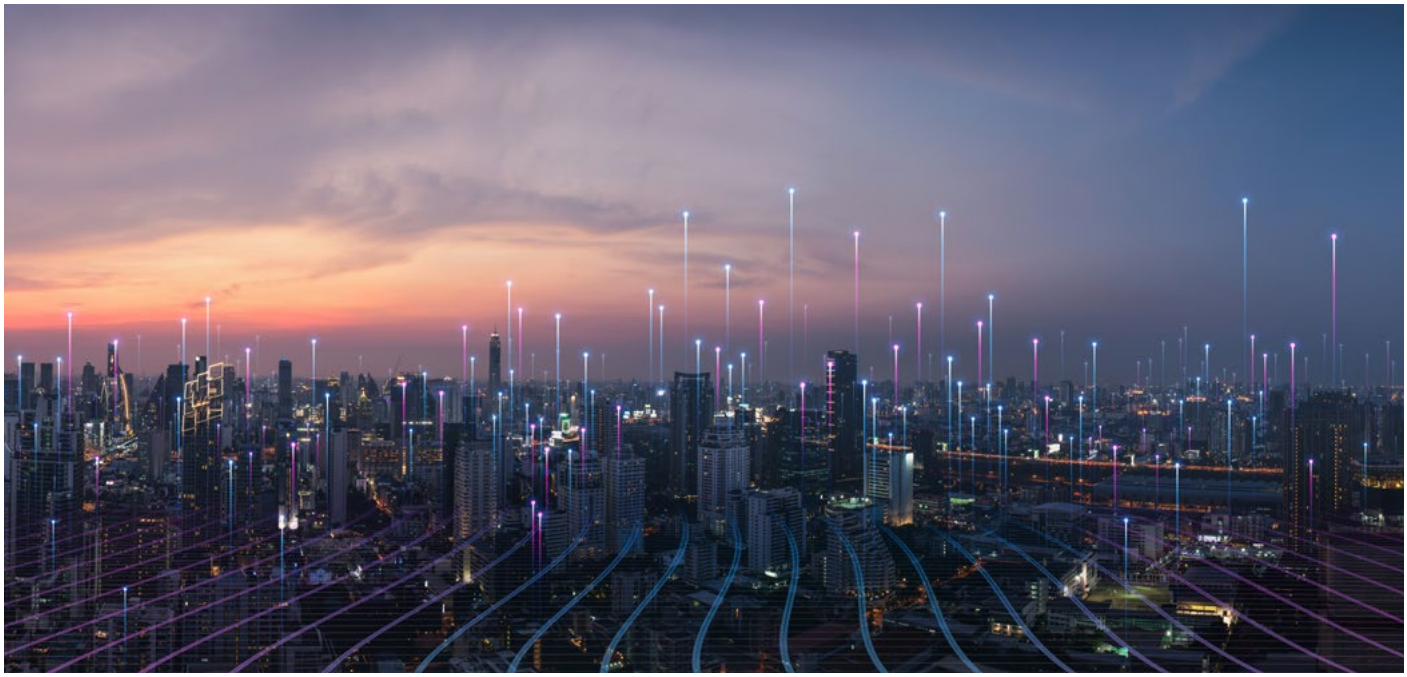
Asia's industrial base provides a distinctive foundation for capturing AI value at scale. Asia accounted for 74% of new industrial robot deployments in 2024, while China has the world's largest operational stock of industrial robots.[7] Dense production networks and established engineering ecosystems create conditions in which AI can deliver compounding gains across interconnected systems – not just within individual firms. This makes the human role more visible. Embedding AI into high-stakes operations requires decisions about where AI should be trusted, where human intervention remains necessary, how domain expertise is codified, and how direction and accountability are structured across human–AI systems.

Divergent demographic and workforce realities

Asia accounts for nearly 59% of the global population,[8] but workforce conditions remain highly uneven. Economies such as Japan and South Korea face rapid ageing, with the population aged 65 and above exceeding 29%[9] and 20%,[10] respectively. Other economies such as India and South-East Asia retain young, expanding labour forces. China sits between these poles, combining scale with emerging demographic pressure.

These differences shape the immediate motivations for AI adoption. Asian countries, especially those in South-East Asia, remain among the world's most optimistic about AI. In China, Malaysia, Thailand, Indonesia and Singapore, more than 80% of respondents say AI will profoundly change their lives in the next 3–5 years. In China specifically, this optimism translates into action: the share of people using AI on a semi-regular or regular basis has already exceeded 80%.[11]

In some contexts, AI is linked to continuity, substitution and productivity under labour pressure. In others, it is linked more to augmentation, inclusion, scale and access.[12] Yet the underlying message converges: AI is beginning to alter not just tasks but the structure of work itself – and it is spreading at a historic speed.



Diverse pathways to success

Asia is not moving through AI transformation in a single way. Some economies pursue broad diffusion and deep embedding; others focus on trust-oriented integration into core systems; still others build momentum through priority sectors, digital infrastructure and selective capability spillovers.

TABLE 1 **Three AI adoption pathways across Asia**

	Broad-based scalers	Sequenced adopters	Sector-priority adopters
Characteristics	– System-wide AI integration – Parallel development of processes, standards and governance – Iterative adoption through capability building and learning	– Structured and phased adoption – Emphasis on reliability, safety and governance – Controlled experimentation and gradual scaling	– Priority-sector AI deployment – Use case-driven problem-solving – Differentiated depth, faster in high-value areas



China's push for high-quality development is accelerating AI adoption at scale, with initiatives moving swiftly from testing to deployment. The growth has been supported by a platform-style governance approach that orchestrates strategic direction, technical standards, pilot projects and shared infrastructure. The result is a distinctive combination of policy-backed scale, industrial depth and consumer dynamism – all advancing in parallel.

Having shifted from the planning to the execution phase, the national AI strategy is supported by the most recent 15th Five-Year Plan (2026–2030), with the central government prioritizing the national "AI+" Initiative to drive society-wide AI penetration.[13]

China's core AI industry exceeded RMB 1.2 trillion ($174 billion) in 2025, with over 6,200 companies.[14] By 2030, the country's AI-related industry scale is expected to exceed RMB 10 trillion – signaling a clear shift from "digitalization" to "intelligentization" as a national economic pillar.

Adoption is already visible across key sectors, shifting from past model innovation towards deep intelligence centred on key industries.[15] In manufacturing, over 30% of industrial enterprises above designated size (i.e., firms with annual revenue of RMB 20 million or more) have deployed AI by the end of 2025.[16] In energy, a 100-billion-parameter industrial foundation model is being used for grid inspection and fault diagnosis, with cumulative calls exceeding 10 million.[17] In healthcare, medical imaging, smart outpatient services and clinical decision support are the top three applications across hospital use cases.[18]

China's user base is also scaling with unusual speed: By June 2025, 515 million people were using generative AI, representing 36.5% of all internet users in the country.[19] The annual growth rate of enterprise AI agent applications in China is forecast to grow at a global-leading 135% annually over the next five years.[20]



Japan demonstrates features of a sequential and assurance-oriented AI pathway. With 29.3% of its population aged 65 and above,[21] ageing pressures create strong incentives to raise productivity while preserving system reliability – a logic reflected in policy from Society 5.0[22] to the 2025 Priority Plan for the Advancement of a Digital Society.[23]

By 2025, generative AI was used by only 26.7% of citizens and fewer than half of firms had formalized AI adoption policies.[24] These figures suggest not a lack of ambition, but a deliberate approach that places greater weight on reliability and institutional confidence. It concentrates AI adoption in manufacturing, healthcare and public administration, where it strengthens human judgement rather than simply maximizing automation.

Singapore positions governance as a catalyst for trusted AI adoption, pairing a strong AI transformation drive with flexible, voluntary frameworks like the Model AI Governance Framework for Agentic AI.[25]

Momentum is clear: 67% of Singapore businesses demonstrate higher AI investment appetite than global peers (41%), and 43% use AI to compete beyond their own sectors – over double the global average of 20%.[26]

The talent imperative is equally pressing: Singapore aims to triple its AI practitioner pool to 15,000 by 2028 and train 10,000 students in physical AI and robotics.[27] With about one in five residents aged 65 and above, AI and robotics also help offset labour constraints.[28]

India demonstrates features of a sector-priority and opportunity-led AI pathway, with momentum driven by digital public infrastructure, entrepreneurial adoption and policy support.

The India AI Mission, approved in 2024 with a budget of over Rs 10,300 crore ($1.25 billion), provides a coordinated national architecture for AI development.[29] Sector applications are advancing in agriculture, healthcare and governance, with language inclusivity built in from the outset – the Bhashini platform supports 20 Indian languages and has exceeded one million downloads.[30] The talent foundation is substantial: India ranks first globally in AI skill penetration, with AI talent concentration growing 263% since 2016.[31]

Critically, AI deployment is being scaled through existing digital public infrastructure – platforms including Aadhaar and UPI already reach 97% of India's 1.3 billion citizens.[32]

These pathways should not be read as fixed country categories, maturity rankings or judgements about transformation quality. They show that AI transformation does not follow one script, but they also converge on the same question: Can humans, organizations, ecosystems and institutions adapt quickly enough for AI deployment to translate into durable value?



2 The pitfalls of deployment before design

Asia is in a position to take the lead in global AI development.[33] Yet the human system – defined by how direction is set, judgement is exercised and accountability is held – evolves relatively slowly. Across surveyed APAC organizations, only 20% report reconfiguring end-to-end processes around AI, compared with 23% in North America and 22% in Europe. Meanwhile, just 8% have adjusted job roles or decision responsibilities accordingly.[34]

Within organizations, this gap is structural. AI is deployed in incremental, local interventions – a new tool here, an automated step there. These decisions are easy to make, require limited coordination and show quick returns. In contrast, the redesign of strategy, processes, roles and accountability requires coordinated, enterprise-wide change. It cuts across silos, challenges existing authority and takes time to show results. Organizational systems, therefore, tend to favour deployment over redesign, resulting in capability accumulating faster than the human architecture required to absorb and adapt to it.

Across ecosystems, the same dynamic is amplified. As AI-enabled decisions move across suppliers, platforms, customers and regulators, value creation becomes interdependent. Yet coordination does not emerge automatically.

Three sources of friction repeatedly appear and constrain system-wide transformation: misaligned objectives, unclear accountability across organizational boundaries and uneven capability across actors. In Asia's tightly coupled industrial networks, these frictions are particularly pronounced.

At the country and regional level, deployment before design also gives rise to a distinct gap: while AI capabilities advance rapidly, institutional frameworks, regulatory coordination and cross-jurisdictional governance often fail to evolve at a matching speed. AI can intensify these differences rather than resolve them.



3 The human-led AI transformation framework

How can Asia ensure that AI capability translates into durable value? It requires rebuilding human systems deliberately around three core responsibilities: setting direction, keeping judgement and holding accountability. Without deliberate architecture, none of these is exercised consistently or at scale.

The full promise of transformation is realized only when change extends beyond the organization itself – across the ecosystems in which organizations operate and through to the regional environments that shape the conditions for scale.

This framework (see Figure 3) operationalizes those three core responsibilities at three interdependent levels, where the actors, mechanisms and stakes are qualitatively different.

FIGURE 3 **Core responsibilities of a human-led AI transformation framework**



Organization-level pillars

Within organizations, real value shows up when people and technology advance together, necessitating the redesign of human roles. Successful redesign demands four interlocking pillars: recalibrating strategy, redesigning processes, reimagining roles and remodeling capabilities.

Recalibrating strategy anchored in long-term value

Regardless of which models an organization chooses to adopt, strategy in the AI age still boils down to what the organization is trying to achieve – which decisions matter most, which outcomes justify redesign and what the organization is not willing to sacrifice in pursuit of efficiency.

Strategic human roles	What this changes in practice
Set AI value priorities	Deployment is tied to specific decisions and performance bottlenecks, not spread opportunistically across functions.
Allocate investment against long-term value	Investment increasingly targets resilience, decision quality and workforce adaptability, not only short-term efficiency gains.
Make workforce transition a strategic issue	Role redesign and capability needs are treated as part of the business model shift, not left to emerge after deployment.

The failure mode is strategic drift: AI that expands horizontally across functions without a coherent theory of how it contributes to organizational purpose. Reversing this requires leaders to ask, periodically, whether the AI portfolio reflects deliberate human choice, or simply the accumulation of individual deployment decisions.

CASE 1

KingMed Diagnostics – Executing strategy through organizational alignment

KingMed Diagnostics advances AI through both leadership direction and employee initiatives. More than 100 AI agents are deployed across core scenarios, covering laboratory testing, clinical services, management and research collaboration. Driven by management adoption, AI supports business analysis to enable data-informed decision-making and improve decision quality. For frontline lab physicians, AI agents reduce repetitive tasks by providing coordinated, comprehensive and explainable support, while human experts retain final decision authority based on medical evidence. These efforts align the workforce with the company's strategy of delivering data-driven, AI-empowered medical diagnostic services.

CASE 2

Kingdee – Embedding AI across the organization

Kingdee rebranded from "Kingdee Cloud" to "Kingdee AI" in 2025, signaling a full transformation into an enterprise management AI company. To embed AI across the organization, the company assessed AI penetration by business unit, promoted tool adoption in R&D and delivery, established an AI innovation committee and introduced incentives such as transformation awards and token subsidy programmes. In 2025, 41% of newly added code was AI-generated, reaching 100% in certain scenarios. The R&D delivery cycle was shortened by 21%, significantly outperforming industry averages.

Redesigning end-to-end processes with human judgement by design

As AI moves from assistance to coordination and execution, processes shift from linear, function-based flows to continuous, system-level operations; tasks are no longer completed within departments but orchestrated across functions in real time.

Strategic human roles	What this changes in practice
Rebuild workflows as closed-loop systems	Sensing, decision-making, execution and learning are continuously connected, replacing fragmented sequential handoffs.
Shift coordination from hierarchy to orchestration	Manual escalation gives way to AI-enabled orchestration across functions, with clearer real-time decision interfaces.
Redesign for outcome ownership, not task completion	Processes are measured against end-to-end outcomes such as service performance, cycle time and quality, and not isolated task delivery.
Embed human judgement, escalation and learning deliberately	Human involvement is concentrated on setting constraints, intervening in high-impact cases and refining the system over time.

The most consequential design choice is the judgement architecture: specifying, explicitly and in advance, where human judgement is required, what information is needed to exercise it, what override authority looks like and how the results of human judgement feed back into system refinement. Without it, human judgement defaults to reactive intervention – exercised when someone notices something wrong, rather than when the process was designed to require it.

CASE 3

Fujitsu – Driving 5x productivity through human-led AI orchestration

Fujitsu partnered with a major electronics manufacturer to transform its global inventory management workflow by deploying orchestrated AI agents over integrated enterprise data, with human oversight. Previously, employees manually calculated component reorder quantities; now specialized AI agents (procurement, inventory, production and sales) propose mitigation measures for stockout risks identified through rules-based logic. An orchestrator agent then selects the best option and executes it via write-back to source systems, unless it exceeds a user-defined cost threshold and requires human review. Staffing requirements were recalibrated from 1,500 to 300 full-time employees as part of broader workforce transformation efforts, supporting proactive retirement planning in an ageing workforce.

CASE 4

Dmall – Rebuilding AI-enabled closed-loop workflows

Retailers face rising complexity that outstrips human decision-making, with fragmented data at headquarters, experience-driven merchandising and overloaded store teams. Dmall rebuilds operations as AI-enabled, closed-loop workflows focused on its D-BRAIN control centre. It translates business goals into coordinated actions across forecasting, pricing, replenishment and anomaly detection. Humans shift from manual execution to intelligent supervision – setting objectives and managing exceptions. This turns individual experience into scalable capability, achieving >92% AI adoption for replenishment, >99% instock rates and ~30% lower waste and labour costs.

CASE 5

China Southern Power Grid (CSG) – Human-led for transmission flow control

CSG has deployed an AI system for transmission flow control under rising renewable variability. A closed-loop workflow connects AI strategy generation, simulation validation, human decision and feedback learning to continuously improve performance. Operator expertise is embedded into the system through reward design and a safety layer that enforces operational constraints in real time. Human intervention is reserved for out-of-distribution or high-risk scenarios via predefined takeover thresholds and escalation protocols. This approach reduces decision time from minutes to seconds, lowers overload risk by ~90% and supports routine operations in the Guangxi control centre.

Reimagining roles in a human–AI operating system

AI changes what people do faster than organizations change what people are responsible for. The gap between them is where accountability diffuses at the organizational level. Training alone cannot close this gap. Instead, closing it requires redesigning roles, decision authority, accountability and performance ownership so that the workforce becomes the organization's accountability architecture.

Strategic human roles	What this changes in practice
Reconfigure work around orchestration	Organizational structures become flatter; humans coordinate across teams and AI agents, directing work rather than executing it.
Redefine roles around judgement and exceptions	Routine execution gives way to context interpretation, ambiguity resolution and system improvement.
Redistribute decision authority	The organization makes explicit who decides, who reviews and which decisions can be delegated to AI.
Reset accountability and performance ownership	Success is measured by the quality and reliability of human–AI outcomes, with clear ownership for sign-off and intervention.

Humans shift from completing tasks to directing systems – coordinating teams and AI agents as an integrated workforce, setting objectives for AI agents, monitoring outputs and intervening when needed. To make this real, performance systems must follow: realigning KPIs from individual task completion to human–AI outcomes is what makes accountability real and exercisable.

CASE 6

Yum China – Redefining the roles of frontline managers

Leveraging AI, Yum China is transforming frontline management and opening new career pathways for store leaders. Routine tasks such as labour scheduling, inventory and demand forecasting are automated, freeing managers to focus on customer experience and team development. Managers review AI recommendations, shifting from execution to judgement. Centralized AI platforms handle recruiting and customer inquiries. Some frontline staff train these systems or transition into specialist roles. As a result, general manager turnover improved from 9.7% to 7.8%; centralized recruitment fills over 90% of hiring needs; and chatbots resolve up to 90% of 150,000 daily customer inquiries.

CASE 7

Motovis – Empowering employees via a unified operating system

Motovis restructured its operating model into a unified "Human–AI Operating System" that defines clear shared responsibilities between humans and AI agents. AI agents perform data-intensive execution tasks tracked by clearly defined, business-aligned KPIs, while employees act as orchestrators focusing on strategic alignment through objectives and key results (OKRs). A human-in-the-loop mechanism enables staff to adjust agents that deviate from organizational goals. This approach transforms the workforce from task executors into high-value supervisors, improving workforce productivity by 22%, increasing agent execution accuracy by 25% and freeing employees to spend 55% more time on strategic tasks.

CASE 8

Animoca Brands – Refining human–AI relationship with agentic AI

Animoca Brands is adopting more agile, governed frameworks for AI scalability, enabling small teams with coordinated agents to handle work that once required larger groups or specialized resources – lowering the cost of creation, prototyping and testing. With around 90% of employees already using AI tools daily across workflows company-wide, agentic AI refines the human–AI relationship: leadership focuses less on supervising manual processes and more on setting direction, defining constraints, allocating responsibility and ensuring accountability. With proper governance, execution becomes easier, faster and more distributed.

Remodelling capabilities through upskilling, reskilling and embedded learning

Once roles are redesigned, the workforce challenge becomes one of transition. Workforce transition should not be reduced to one-off training. Some workers need to deepen existing expertise through AI-enabled upskilling. Others need reskilling as routine tasks decline and demand rises for judgement, coordination and oversight.

A further challenge is knowledge continuity. As roles change, organizations need to capture the tacit knowledge of experienced workers before it is lost. Otherwise, firms may automate parts of the system while eroding the practical expertise needed to manage exceptions, maintain resilience and train the next layer of talent.

Strategic human roles	What this changes in practice
Upskill for redesigned roles	Capability development moves into daily workflows, embedded in operational tasks rather than separate programmes.
Reskill and redeploy across changing work	Expert and frontline knowledge is codified into reusable guidance and workflow support for broader application.
Embed learning in operational contexts	Workforce development draws on operational performance and AI feedback, evolving alongside deployment.
Preserve and transfer institutional knowledge	Tacit expertise is captured and structured into learning pathways before it is lost through role change.
Continuously update workforce capability	Learning priorities shift with operational evidence, new failure modes and changing autonomy boundaries.

Workforce transition is therefore not an adjunct to deployment; it is one of the conditions under which role redesign becomes durable rather than nominal. Only organizations that embed learning in workflows, preserve institutional knowledge and continuously recalibrate against how systems actually perform will find that human roles strengthen over time rather than erode.

CASE 9

Squirrel Ai Learning – Ensuring the continuity of teaching and talent cultivation

Traditional education relies on teachers for content delivery and tacit knowledge, limiting scalability and making knowledge difficult to retain or transfer. Squirrel Ai addresses this by structuring data from billions of student behaviors, capturing implicit teacher knowledge such as student progress and learning patterns into reusable learning paths. This enables continuity across teachers and data-driven coaching at scale. Squirrel Ai now reaches over 50 million users across more than 3,000 learning centres and 60,000 schools.

CASE 10

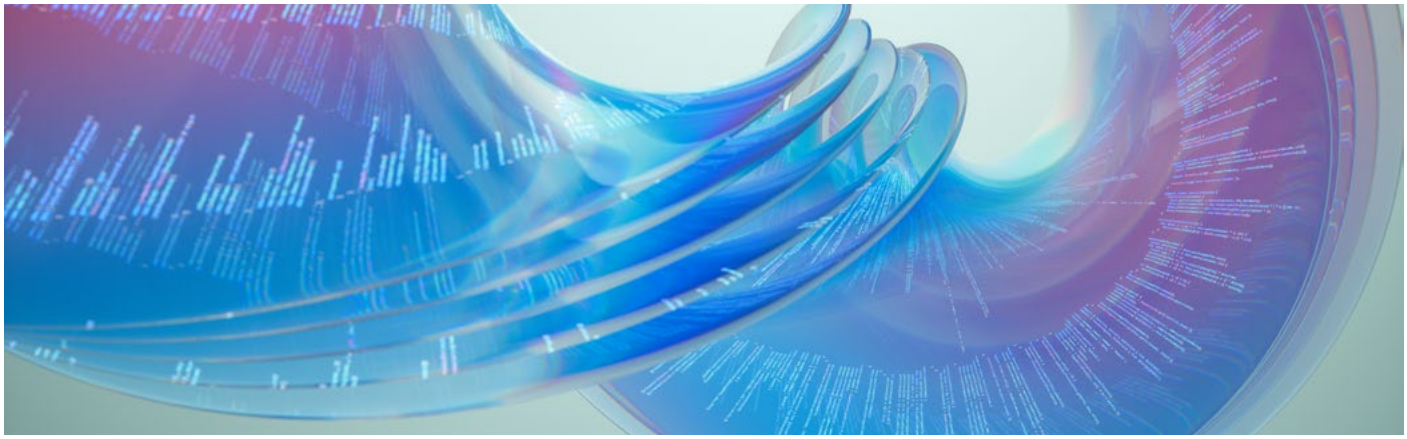
Contemporary Amperex Technology (CATL) – AI-enabled talent development

At CATL, each employee follows a tailored career development pathway with clear technical and managerial progression tracks. This is enabled by continuous upskilling embedded in the operating model, delivering over 42,000 professional training courses annually across electrochemistry, engineering statistics and beyond, with 9.93 million total attendees. To further accelerate capability building, AI is integrated into daily workflows, boosting work efficiency by 50% and enabling faster, deeper innovation.

CASE 11

Biaopu Cloud Technology (BPai) – Turning human experience into shared digital assets

Powered by BPai technology, an environmental protection company built an AI-driven management system that turns human experience into shared digital assets. Its AI centre integrates agents across health, safety and environment (HSE), employee training and production operations, while other applications have shifted employee focus from task monitoring to higher-value decision-making. The result: Operational efficiency improved by 50%, and document processing efficiency rose by more than 80%.



Ecosystem-level levers

Once AI-enabled decisions move across organizational boundaries, scaling becomes a problem of alignment. No single value chain actor can set the direction for the ecosystem as a whole, make decisions beyond its boundaries, or remain accountable for consequences it does not fully control. The human roles at this level centre on three levers: aligning value and decision architecture, building shared trust infrastructure and coordinating workforce transition across the ecosystem.

Aligning value and decision architecture across value chains

Value and decision alignment is harder than technical interoperability. Humans leading organizations enter AI-enabled value chains with different optimization priorities – cost, resilience, service quality or risk control. Without shared value definitions of what the system is trying to achieve, local AI gains do not translate into system value – direction cannot be set coherently across the chain and human judgement has no stable reference point for intervention.

The human task is therefore to establish enough common ground on objectives, decision interfaces and intervention thresholds for AI-enabled decisions to move coherently across organizational boundaries.

Strategic human roles	What this changes in practice
Shared value definitions	Actors align around system-level outcomes such as resilience, quality and safety, rather than local efficiency alone.
Clarify decision interfaces	The value chain specifies where AI-supported decisions transfer, where human review applies and how cross-boundary intervention works.
Coordinate redesign beyond the lead firm	Lead actors use standards and process agreements to align surrounding nodes, not optimize in isolation.

What matters here is whether they are aligned enough on value priorities and decision interfaces for local optimization to accumulate into system value rather than system friction.

CASE 12

HONOR – Aligning value standards across the AI device ecosystem

Guided by the ALPHA PLAN and Augmented Human Intelligence strategy, HONOR is transforming into a global AI device ecosystem company. HONOR is a lead actor in the value chain, driving standard-setting and process restructuring to foster seamless synergy. By aligning suppliers, developers and channels around consistent values, such as ultimate user experience and security compliance, HONOR drives collaborative transformation. This unified ecosystem directly empowers joint innovations like the end-cloud collaborative Robot Phone, accelerating the large-scale application of AI.

Building shared operational trust infrastructure

When AI-driven decisions cross organizational boundaries, judgement and accountability become harder to exercise. Without traceability, people cannot reconstruct what happened or intervene when it should not continue. Without shared incident response, accountability dissolves across the chain – everyone is partially responsible, and no one is fully answerable.

Shared trust infrastructure makes it possible for people to exercise these responsibilities across organizational boundaries. It requires lead organizations, ecosystem conveners, standards bodies and regulators to create practical arrangements for traceability, incident response, intervention and feedback.

Strategic human roles	What this changes in practice
Create traceability across organizations	People can reconstruct how AI-supported decisions were generated, transferred and acted upon across the chain.
Create a cross-organizational incident response	Organizations and sector bodies establish shared mechanisms to report, contain and remediate AI-related failures.
Define shared thresholds for human intervention	Ecosystem participants agree on when human judgement is required, making escalation consistent across organizations.
Use shared feedback to recalibrate the system	Performance insights and operating lessons are used to adjust thresholds, workflows and coordination rules across the ecosystem.

This is what turns trust from an abstract aspiration into a usable operating condition. One in which judgement can be kept and accountability held, even across boundaries no single actor fully controls.

CASE 13

JD Industrials – Building a standardized data ecosystem for product management

JD Industrials leverages JoyIndustrial LLM and the Mercator Standard Product Library to build a unified digital parameter system and identical product identification algorithms. This forms a standardized industrial data ecosystem that reduces redundancy and transaction costs while enabling high-quality data for industrial large language models.

IndLens, a 27-agent data governance platform, serves as the execution layer of this ecosystem, operationalizing standards at scale. It compresses processing from months to hours, improves efficiency over tenfold and reduces labour costs by 80%, enabling workforce shift toward higher-value innovation.

CASE 14

Lenovo – Human–AI collaboration across the supply chain

Lenovo is transforming its global supply chain through iChain, a human-led AI agent deployed across over 180 markets. Built on a persona-based, human-in-the-loop model, iChain delivers insights and recommendations within daily workflows, while humans retain accountability for judgment and execution. The agent also enables ecosystem-level learning by capturing partner feedback from operations, exceptions and collaboration outcomes to continuously refine AI logic and human intervention rules. This approach creates a trusted, evolving human–AI collaboration that drives scalable, resilient supply chain transformation.

CASE 15

Infosys China – Building a “China Stack” ecosystem

Infosys China partners with local hyperscalers to build a “China Stack” ecosystem, integrating domestic foundation models and agent swarms into its Topaz fabric with a common Responsible AI layer. For a process material leader, it delivered an end-to-end solution combining hybrid retrieval, an offline China-based LLM and a LangChain-like framework to optimize customer service and cut operating costs. Reusable components reduced time to stand up compliant pilots, created a repeatable pathway from proof of concept to production, and expanded the catalogue of China-ready generative AI solutions across the ecosystem.

Coordinating workforce transition across the ecosystem

Ecosystems do not transform at the pace of their strongest actor, but at the pace of their weakest critical node. Coordinating workforce transition at ecosystem scale means ensuring that the capabilities required to exercise human roles do not remain concentrated in lead firms while suppliers, service providers and small and medium-sized enterprises (SMEs) fall behind. If capability gaps widen, AI scaling becomes structurally uneven and value chains become brittle.

Strategic human roles	What this changes in practice
Structured mechanisms to transfer learning	Operational lessons are codified and shared across the ecosystem, including where human judgement was needed and how roles changed.
Defining human–AI roles at the sector level	Sector actors translate redesigned workflows into shared role expectations and capability benchmarks.
Shared training pipelines and industry incubators	Employers, educators and sector institutions align training directly to real operational needs and emerging human–AI roles.
SME participation enablement	Smaller firms access shared tools, platforms, knowledge and transition support to participate in AI-enabled value chains.

This requires redesigned role expectations legible across the chain, practical pathways for partners and SMEs to build capability and sector-level institutions to turn local operating experience into wider system competence.

CASE 16

Schneider Electric – Building a human-led AI ecosystem through talent development

Schneider Electric Manufacturing in Batam, Indonesia, adopted a dual-track approach to building a human-driven AI ecosystem. Partnering with 12 universities and vocational schools, it co-develops industry-aligned curriculum and structured internships through the “Schneider Class” initiative. Internally, targeted AI bootcamps upskilled both blue and white-collar workforces. This synergy accelerated digital readiness and fuelled the deployment of advanced industrial solutions. This initiative empowered institutions with AI-aligned curriculum, trained over 1,000 students through industrial projects and deployed over 50 internal AI/IoT solutions, while certifying eight AI experts to sustain long-term ecosystem innovation.

Country and region-level enablers

Policy-makers cannot control how organizations deploy AI or how ecosystems self-organize. They can, however, make the deliberate choices that no algorithm can – on sectoral priorities, responsible regulation and workforce systems needed to navigate an uncertain transition. Countries have three key enablers at their disposal: strategic roadmaps for economic transformation, adaptive regulatory frameworks and resilient workforce systems.

Strategic roadmaps anchored in economic transformation

Strategic direction matters not because all economies require the same model of public intervention, but because large-scale AI deployment rarely unfolds without some mechanism for reducing fragmentation, concentrating effort and linking technical change to wider economic priorities. What varies is the model–market competition, industrial coordination, public procurement or state signaling. What matters is whether these arrangements give organizations and ecosystems a more coherent basis for directing AI transformation, not just adopting it.

At the regional level, the significance of these choices lies less in convergence than in whether they help human-led adaptation journey across borders. The issue, therefore, is not whether economies follow a common model, but whether their strategic choices reduce fragmentation across the wider system or deepen it.

Regional highlight: China

China's 15th Five Year Plan elevates AI to a national strategic backbone, with the AI+ Initiative driving deep integration of AI into the real economy.[35] Governance mechanisms, such as algorithm registration, transparency requirements and security standards, evolve in tandem with deployment. Internationally, China is expanding AI cooperation through broad global initiatives supporting digital infrastructure, smart cities and AI capacity-building in partner countries, while anchoring AI within its own broader transition toward high-quality, innovation-driven and self-reliant economic growth.

Adaptive regulatory frameworks that enable iteration

Regulation matters not because it slows AI down, but because it determines whether responsibility, review and intervention remain workable as AI scales beyond bounded use cases. Organizations move more confidently when the boundaries are clearer: what risks are acceptable, who remains accountable, where human review is required and how those expectations will evolve as evidence accumulates.

The challenge is to create rules that allow experimentation without allowing responsibility to dissolve. The most effective regulatory approaches are therefore not simply strict or permissive but usable. They reduce uncertainty, preserve room for learning and create credible pathways from controlled experimentation to broader deployment.

Regional highlight: Japan

Japan's adaptive regulation relies on a layered, flexible framework. The AI Promotion Act sets strategic direction, while the AI Business Operator Guidelines translate principles into practice and interpretations of existing statutes address sector-specific risks.[36] Within government operations, each ministry and agency appoints a chief AI officer to oversee deployment; the Digital Agency's Advisory Board supports high-risk reviews with tools such as risk assessment flowcharts and procurement checklists embedded in processes.[37]

Resilient workforce systems for an AI-driven economy

No firm can manage workforce transition at scale on its own. As AI reshapes work, workforce systems need to move enough people into redesigned roles quickly enough to keep pace with organizational change. It is a question of transition infrastructure: the education systems, vocational pathways, employer-led training, mid-career reskilling mechanisms and labour-market institutions that determine whether transition is orderly or disruptive.

Increasingly, this also means embedding future-oriented skilling – prioritizing durable human capabilities like analytical judgment, adaptive problem-solving and human-AI – curriculum design and lifelong learning pathways, ensuring workers are prepared not just for the next job but for continual reinvention.

CASE 17

Nankai University – Embedding AI into research and higher-order capability development

Nankai University, in collaboration with Fayu Technology, has integrated the Baishan Hybrid Intelligence Decision Model (AI4SS) into research and teaching. It moves knowledge creation upstream by involving AI in hypothesis generation, reasoning and analysis. Its use in research and teaching highlights a broader shift in education, from knowledge acquisition toward higher-order capabilities such as problem formulation, analytical framework design and creative thinking, signaling a wider transformation in talent development and workforce transition.

Regional highlight: Singapore

Singapore's SkillsFuture initiative is a national lifelong learning strategy fostering a skills-first ecosystem through government subsidies, work-study programmes and employer-led training aligned with industry needs.[38] Since 2015, over half of eligible Singaporeans aged 30 to 75 have utilized their SkillsFuture credits.[39]



4 Three pathways to putting HLAI into practice

A shared framework does not imply a single route to scale. Building on the three pathways introduced in Section 2, this section applies the framework to each.

Broad-based scalers: Wide diffusion and deep economic embedding

In some Asian contexts, AI moves quickly across sectors, functions and policy domains. The central issue is not whether diffusion should continue; it is whether diffusion can be converted into deeper operating change. The priority in this pathway is turning application momentum into repeatable operating logic, interoperable processes and durable productivity gains.

At the organizational level, the task is to consolidate use cases into clearer operating models: which decisions are being improved, where judgement remains concentrated and how roles, incentives and accountability need to shift once AI becomes part of day-to-day execution.

At the ecosystem level, shared standards, traceability, intervention rules and capability diffusion become more important than any one firm's internal progress as AI-enabled decisions move across organizational boundaries.

At the country and regional level, the enabling task is to institutionalize scale rather than merely stimulate it – through workforce systems, regulatory conditions and cross-border arrangements that reduce friction where supply chains and digital infrastructures are already intertwined.

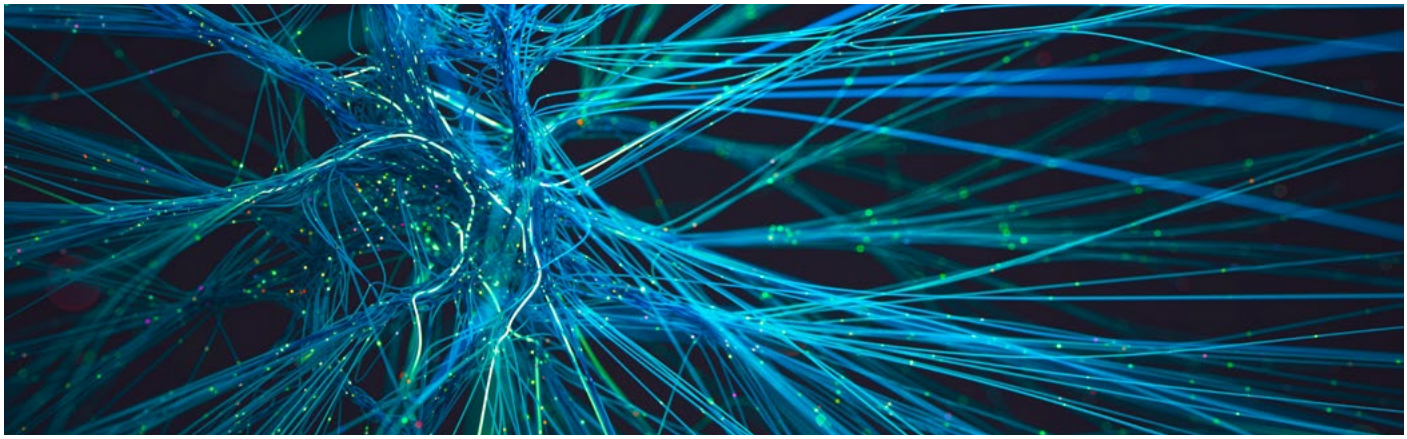
Systematization is the decisive human contribution in this pathway. Rapid diffusion creates raw material; deliberate direction setting, process redesign and ecosystem alignment are what convert it into integrated, durable value.

Sequenced adopters: Trusted integration and phased expansion

A second pathway is characterized less by broad diffusion than by staged, trust-oriented extension. The priority is extending trusted deployment beyond controlled settings into the workflows where larger gains are created.

At the organizational level, the practical task is to move from responsible experimentation to deeper process redesign. Leadership must decide where confidence is now sufficient to extend AI into more consequential operating and decision environments. It is a concentrated judgement where risk, ambiguity, continuity or critical domain knowledge still require active stewardship.

At the ecosystem level, building traceability, shared intervention thresholds and cross-organizational incident response allow trusted internal deployment to travel beyond the firm. The priority is not trust in the abstract, but the transferability of trust.



At the country and regional level, the key enabling task is to ensure that governance frameworks and public coordination do more than preserve boundaries. They must also make more ambitious scaling possible.

Under this pathway, the human task is turning trust into scale. **Extension** is what converts a foundation of governance credibility into system-wide transformation.

Sector-priority adopters: Priority-sector deployment and capability spillovers

A third pathway is shaped less by either broad diffusion or tightly sequenced integration than by concentrated momentum in selected sectors, platforms or enabling infrastructures. The priority is converting selective breakthroughs into broader system readiness.

At the country and regional level, workforce systems, infrastructure and policy coordination become salient earlier. Education systems, vocational pathways, employer training, mid-career reskilling and mobility mechanisms determine whether redesigned roles can be supplied beyond the frontier.

At the ecosystem level, the central task is to diffuse role expectations, operating knowledge and practical capability beyond lead firms. The relevant question is not simply whether smaller actors have access to tools, but if they can participate meaningfully in redesigned operating models rather than remaining dependent on a narrow set of advanced players.

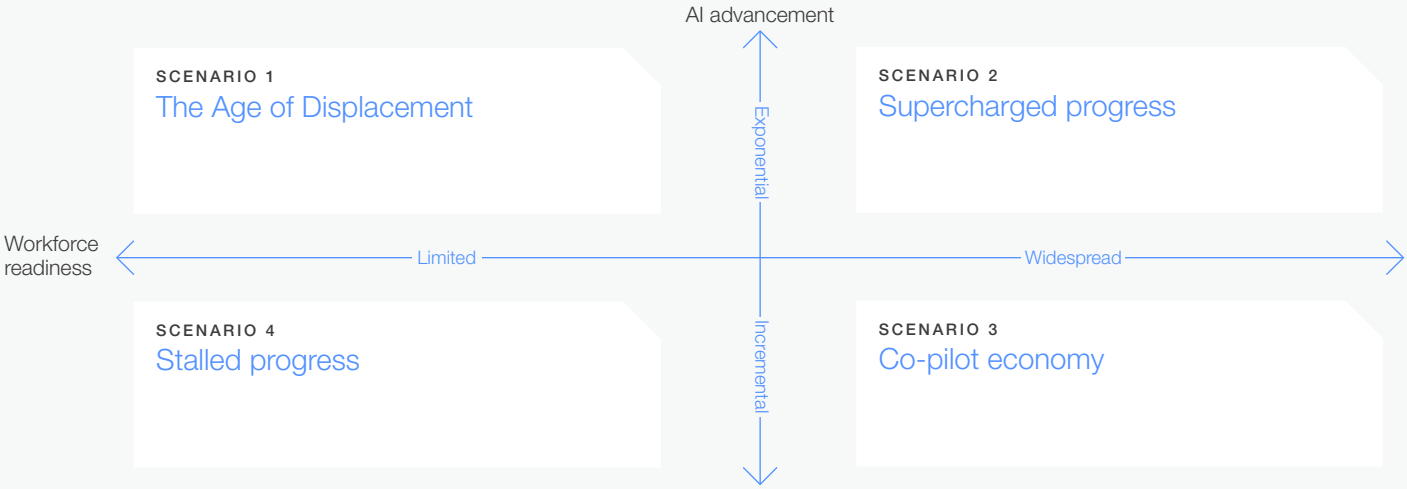
Only after these conditions begin to spread does the organizational layer become the main site of deeper redesign across a wider range of firms. At that point, more organizations can move from isolated wins to integrated operating models.

Selective success is a starting point, not an endpoint. **Diffusion capacity** is what determines whether AI creates a broader transformation dynamic or leaves islands of progress behind.

Future of jobs

The World Economic Forum report, *Four Futures for Jobs in the New Economy: AI and Talent in 2030*, frames the future of jobs around two variables: the pace of AI advancement and the breadth of workforce readiness. The decisive factor is not AI progress itself, but whether workforce systems can absorb change quickly enough. Where readiness is widespread, new occupations and human–AI work models can scale alongside automation. Where it is limited, displacement outpaces absorption and productivity gains become harder to translate into broad-based economic and social value. For Asia, this points to a strategic priority: building a more coherent workforce transition architecture that connects education, training and labour-market mobility.

FIGURE 4 **Four futures for jobs 2030**



Conclusion

Asia is not just the world's most dynamic AI market. It is the decisive test of whether human systems can be reorganized at the speed AI demands.

The scale of that test is without precedent. Dense industrial networks, divergent demographic conditions and wide variation in institutional readiness have made Asia the arena in which the next phase of AI transformation will be shaped – not in theory, but in practice. That gives this moment both urgency and global significance.

What Asia is showing, across all three adoption pathways, is that the determinants of durable value are not primarily technical; they are human and institutional. The gap between deployment and impact closes where leaders make deliberate choices about direction, judgement and accountability, and where those choices are embedded not only within organizations, but across ecosystems and enabling environments. It remains open wherever adoption is allowed to outpace design.

The implications reach well beyond the region. Asia's experience points to three shared responsibilities for global leaders and institutions.

First, the design of human roles cannot be left to emerge on its own. It must be treated as a strategic priority alongside technology investment, with the same senior attention and resourcing. Organizations that act early will gain a durable advantage; those that delay will manage widening gaps between what AI does and what humans can reliably govern.

Second, the conditions for HLAI transformation cannot be built by any single actor. They require alignment across businesses redesigning workflows and roles, governments building workforce-transition infrastructure and adaptive regulation, and civil society and academic institutions ensuring the benefits reach beyond a narrow tier of early movers. Multistakeholder coordination is a structural requirement, not an optional add-on.

Third, governance must mature alongside deployment. Increasingly autonomous systems, cross-border data flows and AI-enabled shifts in competitive advantage are creating asymmetries that existing frameworks were not designed to address. Closing those gaps will require sustained international dialogue, shared standards and new forms of coordination proportionate to the pace and reach of change.

The World Economic Forum's commitment to HLAI transformation reflects the conviction that this moment, while demanding, is genuinely navigable. The decisions made now about how to organize human roles around AI will define the character of the transformation far more than any single model or technology will.

For leaders across organizations, ecosystems and governments, the question is no longer whether to act. It is whether they can build the institutional depth, collaborative architecture and long-term commitment to bring people through change, and to make the resulting gains broad and resilient enough to endure.



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