



26–27 January 2027
Tokyo, Japan

The Race to 2030: Building Japan's AI-native autonomous enterprise

Program overview



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Japan enters the race to 2030 with distinctive strengths in advanced connectivity, AI, robotics, computing, and industrial innovation, but also with challenges that make transformation increasingly urgent. Workforce constraints, rising demand for AI compute and energy, the need for resilient infrastructure and growing requirements for technological and data sovereignty are changing how communications infrastructure must be designed and operated.

Across 1.5 days, TM Forum Tour Tokyo will explore how Japan's communications industry can move from individual AI deployments and domain automation towards an AI-native autonomous enterprise.

Through operator case studies, technical deep dives, panels and fireside conversations, the programme will examine how Composable IT & Ecosystems, Autonomous Networks and AI & Trustworthy Data must come together to modernise legacy environments, automate operations safely, build sovereign AI capability and create differentiated services from intelligent infrastructure.

Take a detailed look at our agenda →

Day one: Building the AI-native CSP



09:00–09:10 Welcome to TM Forum Tour Tokyo

- Setting the context for the Race to 2030
- Why the next phase of transformation must connect network, IT, AI, data, and commercial operations
- The opportunities and challenges that make Japan different

09:10–09:35 Opening keynote: The Race to 2030 – from transformation to the autonomous enterprise

- Moving beyond digital transformation towards AI-native operations
- Connecting customer intent, network and IT execution, assurance, and commercial outcomes
- Why composability, autonomy and trusted intelligence must develop together
- Turning technology investment into measurable improvements in cost, resilience, customer experience, and growth

09:35–09:55 Government keynote: Building Japan's digital infrastructure for the AI era

- Building resilient national AI, telecommunications, compute and data infrastructure
- Creating the right environment for sovereign AI and responsible use of strategically important data
- Supporting a domestic AI ecosystem involving Japanese models, technology companies, and research partners
- Balancing growing AI and data-centre demand with energy availability and sustainability
- Preparing the foundations for 6G and next-generation digital infrastructure

09:55–10:30 Leadership panel: Where can Japan lead the AI-native communications era?

- Where can Japan establish genuine global leadership — AI-RAN, IOWN, robotics, sovereign AI, autonomous networks, or advanced computing
- Which capabilities should Japanese operators build themselves, and where should they work with domestic and global partners?
- Can autonomy address workforce constraints while increasing resilience and service quality?
- How can innovation developed in Japan become globally adopted technology, architectures and standards?

10:30–11:00 Networking break

COMPOSABLE IT & ECOSYSTEMS: MODERNISING THE FOUNDATION

Day one: Building the AI-native CSP



11:00–11:25

Operator case study: Modernising brownfield BSS and OSS for the AI-native telco

- Deciding what to modernise, replace, expose through APIs, or leave in place
- Migrating towards modular, cloud-native architectures without destabilising live services
- Managing coexistence between legacy applications and new platforms during multi-year transformation
- Measuring whether transformation is genuinely improving cost, release velocity, resilience, and time-to-market

11:25–11:50

Technical deep dive: From ODA blueprint to an executable operating architecture

- Turning ODA components and APIs into reusable capabilities across network and IT
- Moving beyond point-to-point integration towards APIs, events, and machine-readable contracts
- Enabling AI agents to discover and safely interact with operational capabilities
- Embedding observability, security, policy, and governance into the platform rather than adding them afterwards

11:50–12:25

Panel: Best-of-breed, best-of-suite or hybrid – what architecture wins in an AI-native world?

- Does AI make heterogeneous environments easier to orchestrate or simply expose fragmented data and business logic?
- How can CSPs combine products from multiple suppliers without recreating integration complexity?
- Where should common data models, APIs and event standards sit?
- How do operators preserve architectural control while avoiding both vendor lock-in and excessive internal complexity?

12:25–12:45

Fireside chat: Technology changed— did the operating model?

- Moving from project-based transformation towards persistent platform and product teams
- Clarifying ownership across network, IT, data, and AI
- Creating governance that enables faster change rather than slowing it down
- Developing the skills needed to operate modular platforms and increasingly autonomous systems

12:45–13:45

**Lunch and
networking**

**AUTONOMOUS NETWORKS: FROM
AUTOMATION TO PRODUCTION AUTONOMY**

DAY ONE CONTINUED →

Day one: Building the AI-native CSP



13:45–14:10

Operator case study: Level 4 in production – what changed and what did it deliver?

- Identifying where autonomous operations are genuinely running in live production environments
- Moving from alarm handling and recommendations to closed-loop execution
- Demonstrating measurable impact on MTTR, OPEX, energy use, SLA performance, or customer experience
- Understanding what still requires human intervention and why

14:10–14:35

Technical deep dive: Multi-agent operations in the live network

- Coordinating specialist AI agents across monitoring, diagnosis, decision-making, and execution
- Capturing and scaling operational knowledge previously held by experienced engineers
- Giving agents access to the data and tools required to act across multiple domains
- Maintaining auditability, rollback, human supervision, and operational safety

14:35–15:10

Panel: Where does Level 4 break – brownfield systems, multi-vendor networks, and human accountability?

- Can autonomy work consistently across infrastructure and software from multiple suppliers?
- Which legacy systems and operational processes remain the biggest blockers?
- How should operators determine when an agent can act autonomously and when humans must intervene?
- What evidence should be required before an autonomous use case moves into production?

15:10–15:30

Fireside chat: 6G is getting closer – what should operators be doing now?

- Moving from 5G-Advanced towards the early architecture and operational foundations for 6G
- Understanding how AI-native RAN, sensing, distributed compute, and non-terrestrial connectivity may change network design
- Exploring the emerging relationship between “AI for Network” and “Network for AI”
- Identifying which investments operators can make now without betting prematurely on future technology

15:30–16:00

Networking break

**TRUSTWORTHY AI & DATA: FROM
EXPERIMENTATION TO CONTROLLED AUTONOMY**

DAY ONE CONTINUED →

Day one: Building the AI-native CSP



16:00–16:25

Technical deep dive: Building the trusted data foundation for telco AI agents

- Creating reusable, governed data products across network, IT, customer, and commercial domains
- Improving data quality, lineage, semantics, and real-time availability
- Giving AI agents the operational context they need without giving them unrestricted access to sensitive information
- Combining structured operational data, enterprise knowledge, and retrieval techniques to improve the accuracy of AI decisions

16:25–16:50

Japan case study: Sovereign AI in practice – Japanese LLMs, domestic partners and global ecosystems

- Where Japanese-language and telecom-specific models can provide advantages over general-purpose global models
- Deciding when to use domestic models, global foundation models, open models, or a combination
- Running sensitive workloads on premises, in private cloud or through sovereign AI infrastructure
- Building partnerships across Japanese CSPs, AI developers, technology companies, universities, and research organisations
- Evaluating models on accuracy, cost, performance, security, and operational suitability, not nationality alone

16:50–17:25

Panel: Can we trust AI to operate critical communications infrastructure?

- Establishing identity, permissions, and operational boundaries for autonomous agents
- Securing AI agents, models, data and tool access against cyber threats and manipulation
- Determining accountability when an AI agent makes an incorrect operational decision
- Continuously evaluating model and agent performance after deployment
- Creating effective human oversight without rebuilding the manual bottlenecks autonomy was intended to remove

17:25–17:30

Day One closing reflections

Day two: Turning intelligent infrastructure into value



09:00–09:10

Welcome back: From autonomy to value

- Day One built the foundations: composable technology, autonomous execution, and trusted intelligence
- Day Two asks how those capabilities change the economics of connectivity and infrastructure

09:10–09:35

Japan keynote: When power becomes a technology constraint building AI, network, and compute infrastructure together

- Responding to rapid growth in electricity demand from AI and data-centre infrastructure
- Coordinating network architecture, compute location, power availability, and renewable energy
- Deciding where AI training and inference should run across central, regional and edge infrastructure
- Using AI itself to optimise energy consumption across RAN, cloud, data centres and compute
- Turning energy efficiency from a sustainability metric into an architectural and economic requirement

09:35–10:00

Technical deep dive: AI-RAN and physical AI – when networks carry decisions, not just data

- Combining communications and AI computing resources within next-generation infrastructure
- Supporting robots, autonomous mobility, factories, and other physical-AI environments
- Meeting increasingly demanding requirements for latency, reliability, inference, and assurance
- Understanding where AI-RAN creates genuine operational or commercial value rather than additional infrastructure complexity

10:00–10:20

Fireside chat: Sovereign AI at the edge – what should stay in Japan, and what should run locally?

- Determining which data, models and inference workloads require domestic or local execution
- Combining edge computing with Japanese and global AI models
- Managing data residency, model governance, and security across distributed infrastructure
- Understanding the commercial opportunity for CSP-provided sovereign AI and inference services

10:20–10:50

Networking break

FROM CAPABILITY TO COMMERCIAL OUTCOME

DAY TWO CONTINUED →

Day two: Turning intelligent infrastructure into value



10:50–11:15

Technical deep dive: Building the commercial stack for outcome-based services

- Translating a customer requirement into product configuration, network policy, and service orchestration
- Connecting catalogue, order management, orchestration, assurance, SLA management, charging, and settlement
- Dynamically adapting the service when network conditions or customer requirements change
- Proving that a promised outcome was delivered before billing for it

11:15–11:40

Operator case study: Turning network APIs into products customers will actually buy

- Moving from exposing technical network capabilities to creating consumable commercial products
- Using common APIs to reduce friction for developers and enterprise customers
- Integrating API products with identity, security, product management, charging, and partner settlement
- Identifying where Japanese operators can collaborate to create scale while still differentiating commercially

11:40–12:15

Panel: Beyond connectivity – what will customers pay telcos to guarantee?

- Moving beyond best-effort connectivity and flat-rate access towards assured performance
- Combining connectivity, compute, intelligence, security, and assurance around customer outcomes
- Identifying where customers will genuinely pay premiums for latency, reliability, coverage, security, or local AI capability
- Creating commercial models that share value and accountability across multiple ecosystem partners

12:15–12:40

Operator case study: Always connected Japan – integrating terrestrial, satellite, and autonomous operations

- Combining terrestrial and non-terrestrial connectivity into a consistent service experience
- Supporting remote locations, transport, maritime industries, and emergency services
- Using autonomous operations to anticipate disruption, reroute services and restore connectivity
- Designing communications infrastructure for earthquakes, extreme weather, and other major events
- Turning resilience and continuity into measurable service capabilities

Day two:

Turning intelligent infrastructure into value



12:40–13:15

Closing leadership panel: What must Japan's communications industry build together?

- Which architectures, APIs, data models, and assurance frameworks require industry-wide agreement?
- Where should Japanese companies collaborate around domestic AI capability while remaining connected to global ecosystems?
- How can the industry prevent fragmentation across autonomous agents, network platforms, and AI infrastructure?
- Which capabilities should Japan seek to standardise and export globally?
- What needs to happen between now and 2030 rather than waiting for 6G?

13:15–13:20

The Tokyo action agenda: Five priorities for the Race to 2030

1. Modernise brownfield IT around modular, interoperable and AI-ready foundations
2. Move autonomous operations from pilots to measurable production deployments
3. Build trusted data, AI governance, and agent assurance into the architecture
4. Develop energy-efficient, resilient, and sovereign AI and communications infrastructure
5. Turn autonomous capabilities into products and outcomes customers are prepared to pay for

13:30

Conference closes