PUBLIC SECTOR AI ADOPTION: JAPAN FACTSHEET

A PROJECT BY PUBLIC FIRST FOR THE CENTER FOR DATA INNOVATION, SPONSORED BY GOOGLE

This factsheet draws on findings from the Global AI Adoption Index for Public Services, based on a survey of 3,335 public sector workers across ten countries. This research included a sample of **372 public sector workers** in Japan, comprising **270** from local or regional government entities, **74** from national government or national government entities and **28** from other public sector entities.

The index measures how AI is experienced in practice. What is written in government strategies does not automatically translate into real-world impact. Approaches across countries are varied, the index helps explore these differences and make recommendations to improve AI use.

It brings together five indicators that shape real-world adoption: **enthusiasm** for AI, **education** and skills, **empowerment** through clear permission and governance, **enablement** via access to tools, and **embedding** into everyday workflows. Together, these provide a practical snapshot of AI adoption in Japan, set against international peers. Full results are available on the main index webpage.

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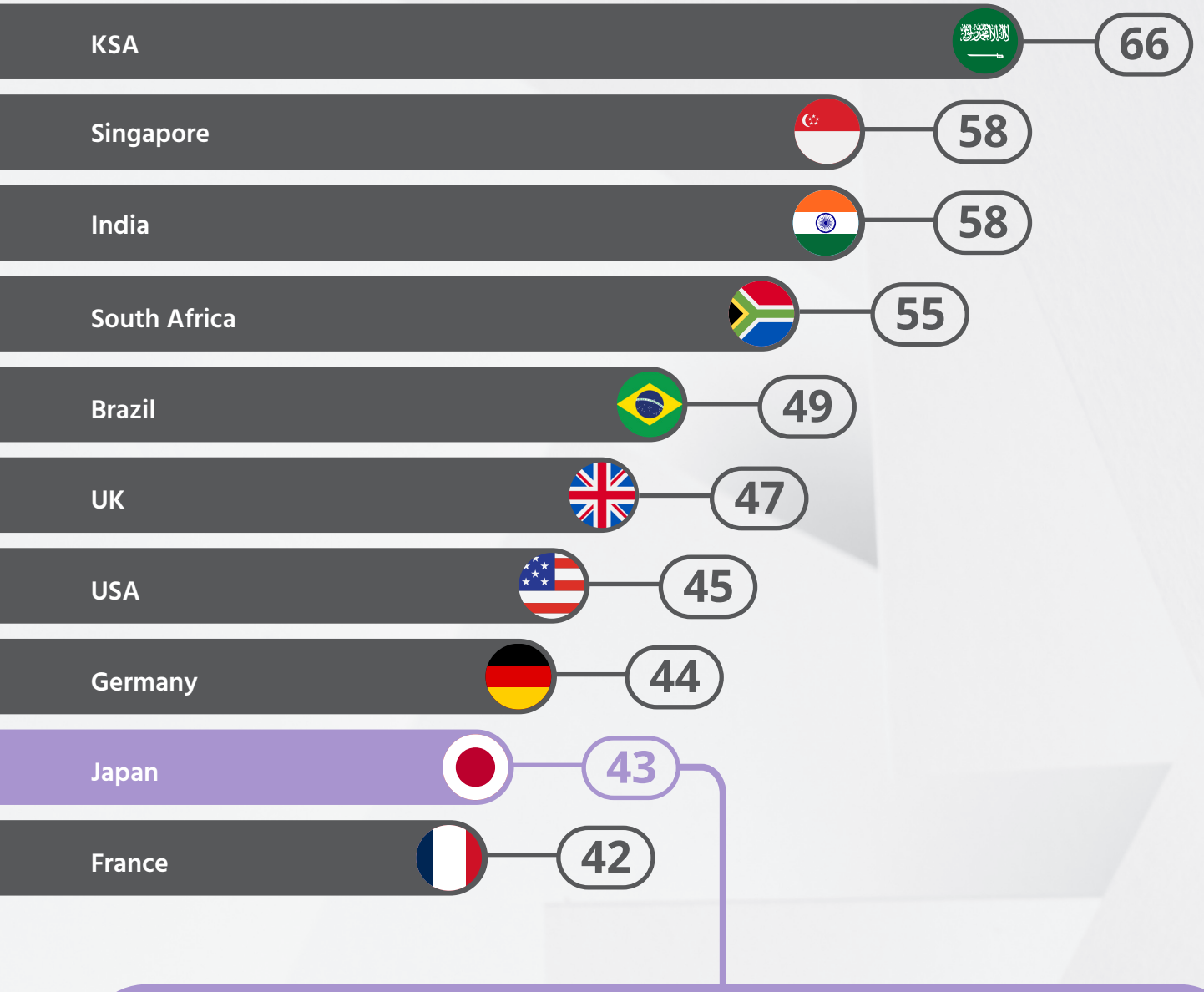
PUBLIC SECTOR AI ADOPTION: JAPAN CONTEXT

Driven by the vision of becoming "**the country most friendly for AI development and utilization**", Japan has set out a clear ambition to use AI to address long-standing public sector challenges, including **workforce shortages**, an **ageing population**, and the need to **improve productivity** across government. National strategies and guidance led by the Cabinet Office and digital agencies have framed AI as a key enabler of administrative reform, data-driven policymaking, and more efficient public services.

In practice, however, adoption across the public sector has been cautious. While Japan has strong technical capability and a mature private-sector AI ecosystem, public sector use has often been limited to small pilots or tightly controlled applications. A strong emphasis on risk management, compliance and reliability has shaped how AI is approached, with public trust, data protection and system stability prioritised over rapid experimentation.

As a result, Japan's challenge is not a lack of strategic intent, but creating an environment in which public servants feel confident using AI in their day-to-day work. Clear permission from leadership, practical training, and better integration of AI into existing systems will be critical to moving from cautious experimentation to routine, scalable use across government.

JAPAN IN THE GLOBAL INDEX



Japan has set out a clear ambition to use AI to address long-standing public sector challenges, including workforce shortages and productivity constraints. The next phase is about translating this strategic intent into confident, everyday use by public servants across government.

- Japanese public servants currently report some of the most conservative levels of confidence and hands-on AI use in the global index. **Nearly 80%** of public servants say they **do not feel confident** using AI tools, and **three in ten** report **never having used AI at work** at all.
- Access to AI tools is limited, with **fewer than half (44%)** of public servants saying their organisation has **invested in AI tools** such as licences or local automation systems. Compared with peer countries, use is more likely to be confined to small pilots or tightly controlled applications rather than integrated into everyday workflows.
- Organisational rules are often unclear or restrictive, and more than a quarter say AI use is actively discouraged, contributing to low optimism about AI's practical value.

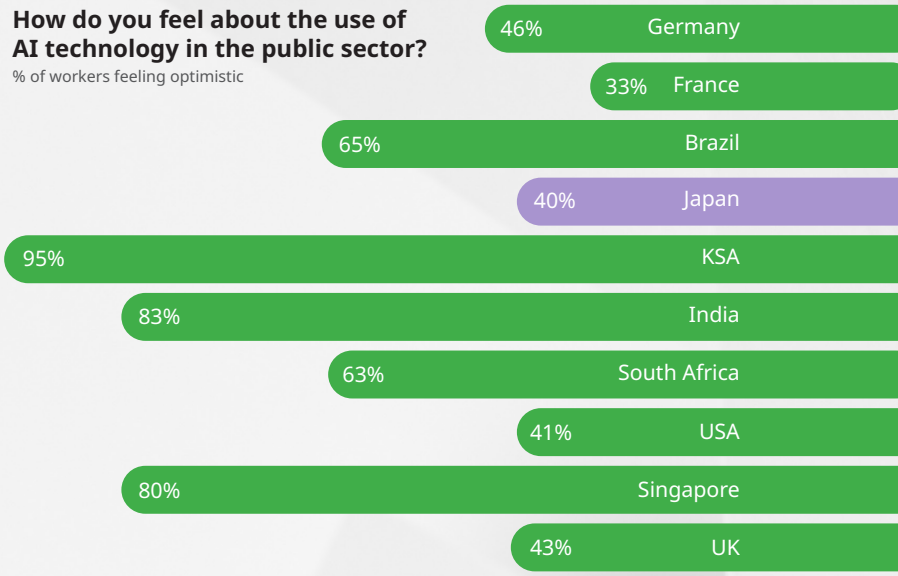
With clearer permission from leadership, targeted training to build basic confidence, and better access to trusted tools that can leapfrog legacy systems, Japan could move from cautious experimentation to routine, scalable use. This will support public servants to work more effectively and meet Japan's strategic goals.

WHAT OUR RESEARCH SHOWS

Our research suggests Japan sits at the more cautious end of the AI maturity index, with public sector workers reporting the most conservative levels of confidence and knowledge across all countries. Adoption is limited: 3 in 10 workers have never used AI at work, and where it is used, it is largely confined to simple, one-off tasks. **More than 65%** do not believe AI is used **effectively** within their team, department or organisation. Limited exposure to meaningful use means few workers experience tangible benefits, contributing to low optimism about AI's wider potential.

How do you feel about the use of AI technology in the public sector?

% of workers feeling optimistic



Education and empowerment are the main constraints. Most workers report no organisational investment in AI tools such as licences or automation systems (44%), and more than a quarter say AI use is discouraged or restricted. Training is limited, with **59%** receiving **no formal support**. Combined with difficulties integrating AI into existing systems, this creates a high-friction environment for experimentation.

Overall, caution outweighs momentum. Without clearer policies, investment in tools and integration, and targeted training to build confidence, AI is likely to remain peripheral — promising in theory but out of reach in practice.

Enthusiasm 51/100

Perceptions of AI are mixed, with recognition of potential benefits but limited enthusiasm or inconsistent experiences. Engagement exists but remains cautious, episodic, or uneven across roles.

Education 43/100

Training is limited, low quality, or absent, leading to conservative levels of confidence and difficulty understanding AI systems. Lack of knowledge and upskilling opportunities are primary constraints on adoption.

Empowerment 39/100

AI use is constrained by unclear, overly restrictive, or poorly communicated rules, leading to hesitation and risk aversion. Concerns about compliance, security, or leadership support significantly discourage use.

Enablement 44/100

Some AI tools and resources are available, but access is uneven across departments or not well matched to everyday needs. Gaps in coverage, support, or role-specific access prevent consistent and scalable use across the organisation.

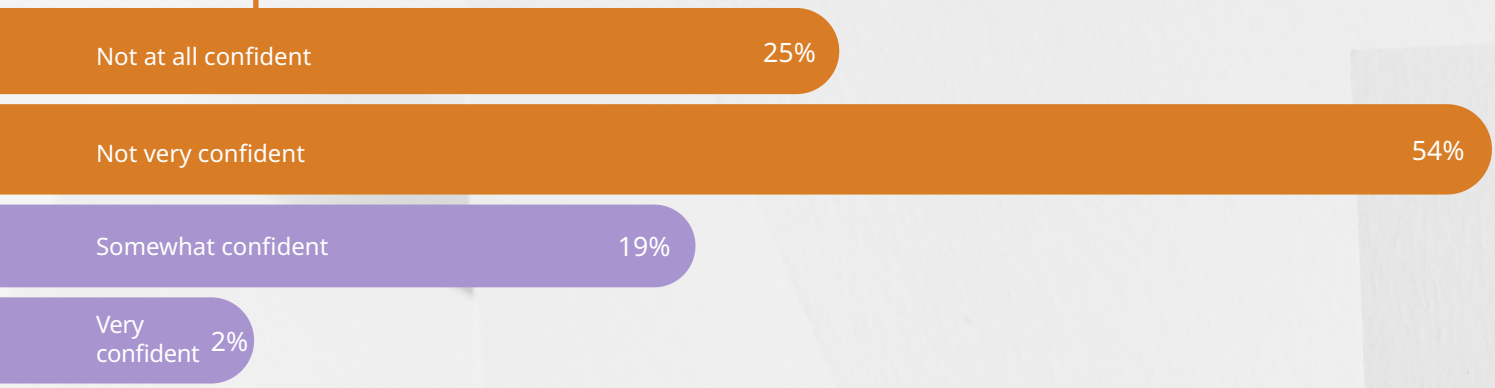
Embedding 37/100

Minimal formal infrastructure, with few supporting structures, limited investment, and significant barriers to integration with existing systems. Structural barriers significantly limit the ability to scale AI use.

UNIQUE FEATURES OF JAPAN

What distinguishes Japan is an environment that actively inhibits experimentation and learning. Confidence is subdued, peer learning is rare, and organisational signals often discourage rather than enable AI use. As a result, AI remains peripheral to everyday practice rather than being experimented with or gradually embedded.

Japanese public servants report some of the most conservative levels of confidence and knowledge about AI of any country surveyed, and their **limited education score (43/100)** reflects this. **80%** say they do not feel confident in their ability to use AI tools, while **two-thirds (66%)** report knowing **little to nothing** about AI. Many public servants are unclear about what they can and cannot use AI for at work **(47%)**, their workplace's overall approach to AI usage **(45%)**, and what data they are permitted to share with AI tools **(42%)**.



Unlike many other peer countries, Japan shows little evidence of informal or peer-led experimentation. **63%** say they have **not learned a new way of using AI from a colleague**, and the great majority report never having used AI without their manager's knowledge or accessed tools via personal logins. This points to a strongly risk-averse and compliance-oriented culture, with strong adherence to organisational guidance and existing governance frameworks when it comes to AI use.

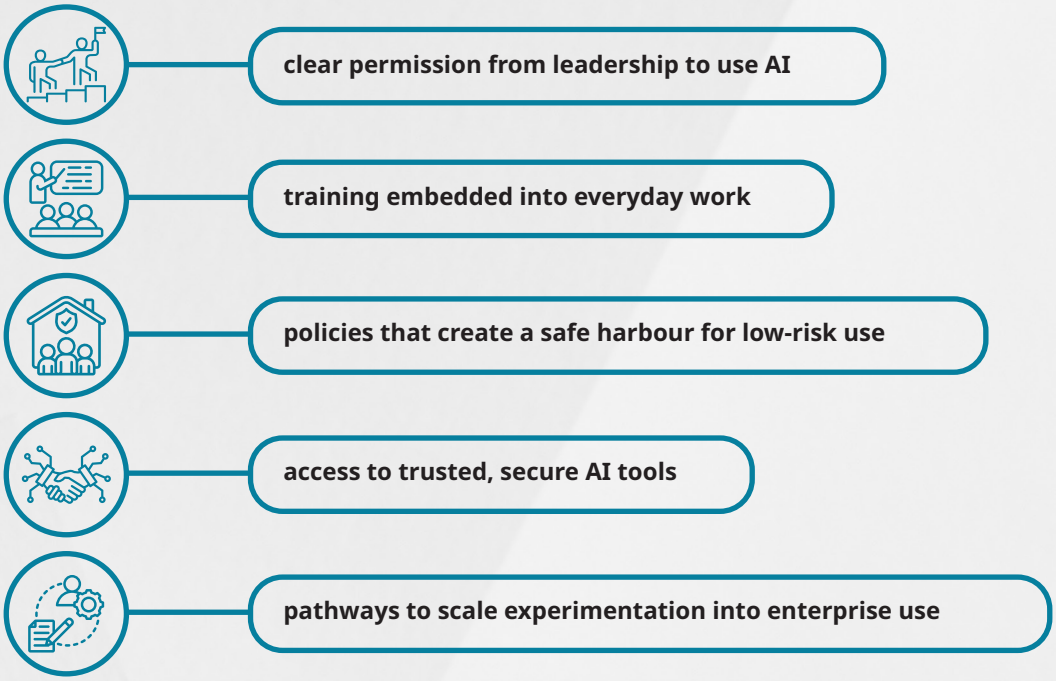
Which of the following, if any, have you experienced at work?

Empowerment is also a weak spot for Japan. There is little impetus from Japanese senior management to encourage the use of AI in the workplace. Japan has the **highest share** of respondents reporting that their organisation **actively discourages** the use of AI. Most public servants have also received no training on how to use AI tools and even where training exists, only small minorities report **applying AI to real work problems (26%)** or seeing **improvements in team productivity (31%)**.

Japan's challenge is the absence of an enabling environment in which public servants can build confidence safely and incrementally. Without clearer permission structures, practical training, and visible senior sponsorship, AI is unlikely to move beyond isolated, low-impact use.

HOW TO ENHANCE AI USE IN THE PUBLIC SECTOR: STEPS THAT CAN BE TAKEN IN JAPAN

Our research points to five actions that consistently support stronger AI adoption across countries:



Together, these create the conditions for public servants to move from basic experimentation to confident use that can prepare the ground for significant public sector transformation.

WHAT MATTERS MOST FOR JAPAN

For Japan, the priority is to **rapidly build confidence** and **normalise AI use** in everyday public sector work. Low adoption is driven by limited knowledge, unclear permission and a lack of visible benefits. To change this, Japan needs to move quickly on the basics and create momentum. Three priorities stand out:

1

Build confidence from the ground up with simple, accessible AI training

Many Japanese public servants lack basic confidence in AI. Short, practical "introduction to AI" courses — focused on what AI is, how it can be used safely, and where it adds value in public sector roles — are essential. To build confidence quickly, training should start with a small number of trusted, commonly provided tools that staff are officially allowed to use. This reduces fear about compliance and data security and makes it easier to get started.

2

Pair investment in tools with clear permission and visible leadership support

Training alone will not work without **access and permission**. Japan needs clearer signals from senior leaders that AI use is allowed, encouraged and expected for appropriate tasks. This should be backed by investment in approved, secure AI tools and clear guidance on data use. Leaders should actively champion AI, share examples of use, and model adoption themselves to shift workplace norms.

3

Incentivise early use through clear benefits, case studies and rewards

To break inertia, Japan should actively encourage experimentation. Sharing concrete case studies where AI saves time or improves outcomes — alongside incentives such as innovation challenges, recognition or small prizes — can help create early wins. These signals can catalyse a culture shift, moving AI from a perceived risk to a practical tool worth trying.