

15 October 2025

EU Delegation to Japan & JEITA



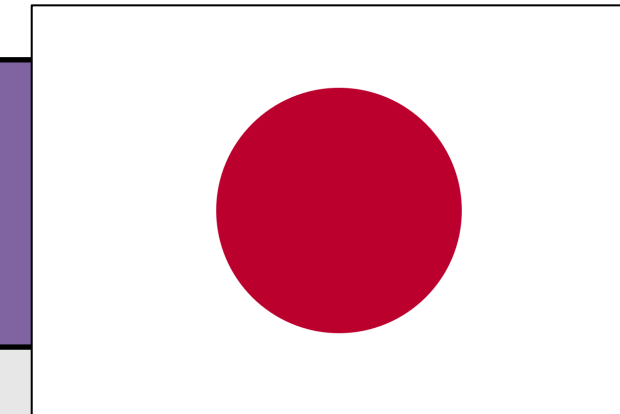
Towards a new dimension of EU-Japan digital partnership

Sebastiano Toffaletti, Secretary General

The challenge we share



- Dependent on foreign import for **>80% of digital technologies**



- **Digital trade deficit:** ¥6.65 trillion (€38 billion) in 2024

- **70% of cloud market** controlled by 3 US companies

- **US providers highly influential** in Japanese cloud market

- **Only 10%** of global Semiconductor production

- Once dominant semiconductor industry dwindled to **<10% market share**



Outspending the world to own the digital future



AI EFFECT

OpenAI leads private market surge as 7 tech startups reach combined \$1.3 trillion valuation

PUBLISHED SAT SEP 20 2025 9:00 AM EDT



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OpenAI, Oracle, SoftBank plan for new AI data centers for \$500 billion Stargate project

OpenAI weighs US\$25b Argentina data centre project

By [Walter Bianchi](#) Contributor

12 October 2025

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theguardian.com



TechScape newsletter

This article is more than 2 months old

The trillion-dollar AI arms race is here

Google, Amazon and Meta are pouring billions into AI infrastructure, but at what cost to the planet, creatives, and the grid?

thejapantimes

BUSINESS / TECH

Nvidia and OpenAI make \$100 billion deal to build data centers

FINANCIAL TIMES

“Absolutely immense”: the companies on the hook for the \$3tn AI building boom

FINANCIAL TIMES

OpenAI + Add to myFT

OpenAI extends chip spending spree with multibillion-dollar Broadcom deal

Deal could cost up to \$500bn on top of start-up's \$1tn pledge for semiconductors and data centres

AWS plans to invest €15.7 billion in Spain, supporting 17,500 jobs annually in local businesses

Written by About Amazon Team



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Microsoft plans to invest \$80 billion on AI-enabled data centers in fiscal 2025



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Amazon to invest \$13 billion in Australia's data center infrastructure over five years

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Microsoft wants to ally itself with Europe: What's behind the billion-dollar investment?

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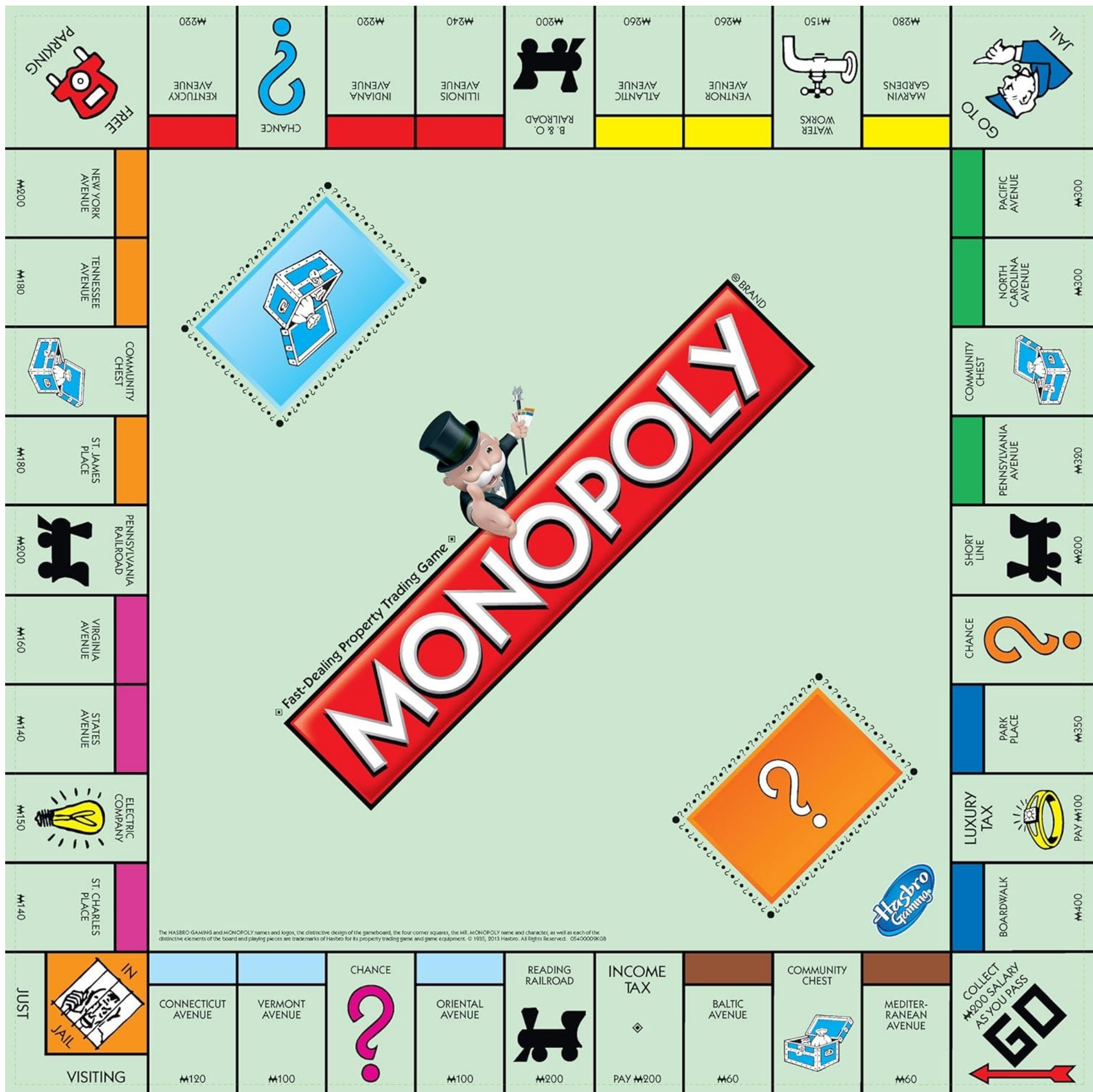
Microsoft to spend \$80bn on AI data centers in 2025

Company says US will have to be smart to win AI race with China

thejapantimes

BUSINESS / TECH

AI giant Nvidia becomes first company to reach \$4 trillion milestone



Next to the U.S. private sector, the new U.S. government tech foreign policy

- U.S. AI Action Plan
 - Export controls tying AI chips with US cloud and software – “*AmericaStack*”
- EU-U.S. trade deal
 - 15% unilateral tariff; EU to buy \$40 billion worth of Nvidia AI chips; No to network fees
- U.S. gov deal with Nvidia
 - 15% levy on AI chips exports
- U.S.-UK Tech Prosperity Deal
 - \$42 billion investments in AI and Quantum, mainly from Microsoft, Open AI and Google
- U.S.-Japan trade negotiation
 - 15% unilateral tariffs and...

Reducing dependencies: building a tech alternative together



A shared mission

Neither governments nor businesses can do this alone.

We need a true industrial policy and strong public-private partnerships to build new digital public infrastructure.

The global race is on

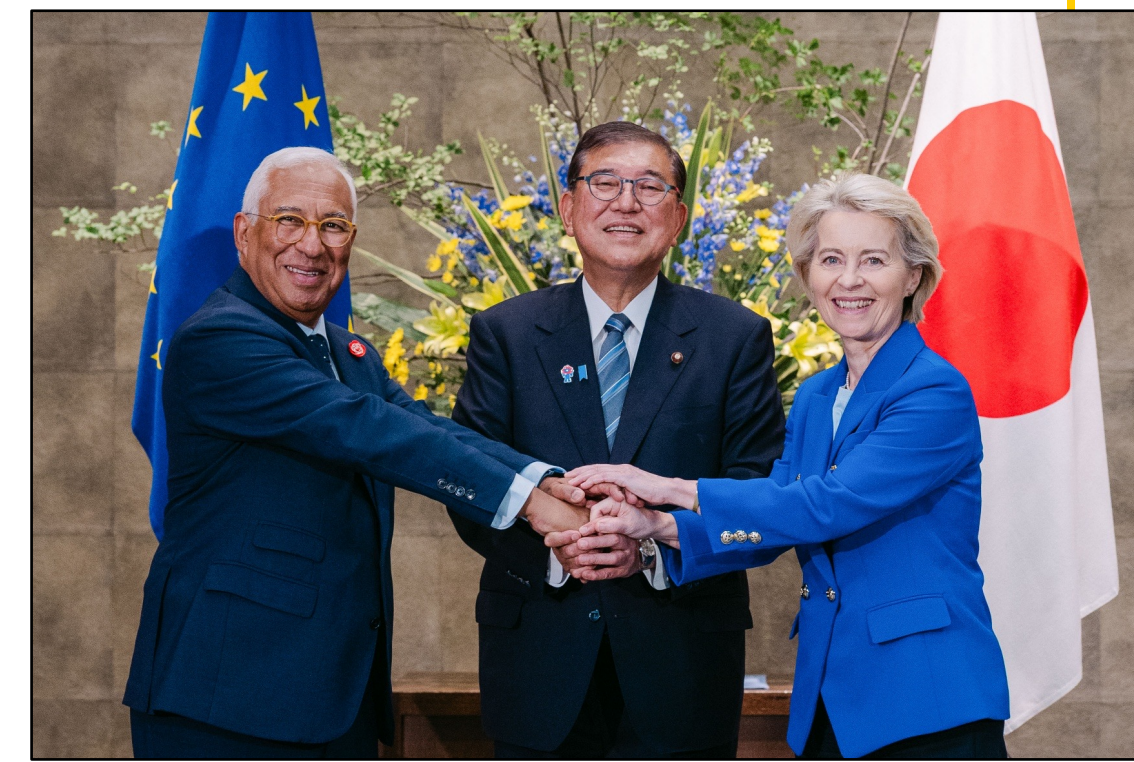
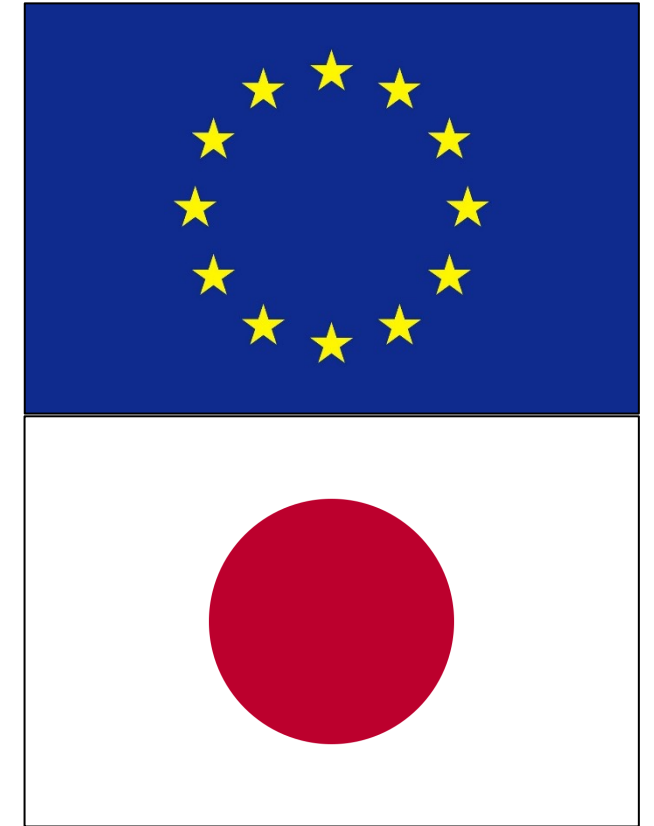
Europe: €200 billion for the AI Continent Strategy

Japan: \$65 billion for chips and AI

➡ Both are investing heavily in local technology and sovereignty

The real question

It's not whether to build sovereign tech —
it's whether we build it separately... or together.



Thank you!

CONTACT US

ありがとうございます た



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