

15 October 2025

EU Delegation to Japan & JEITA

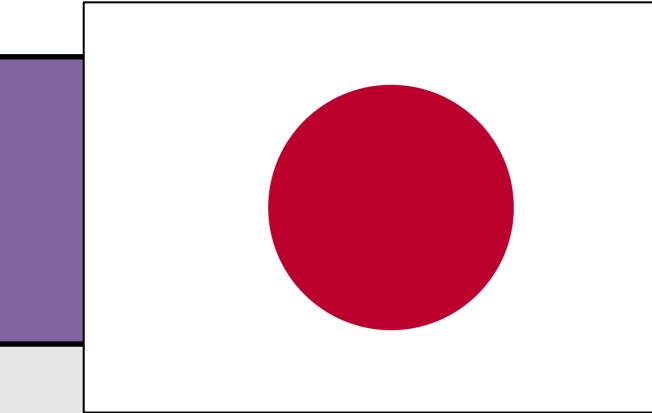
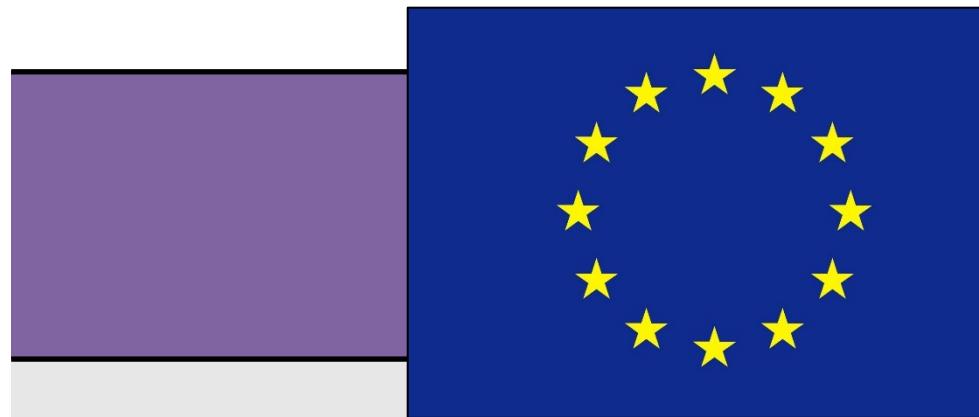


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# Towards a new dimension of EU-Japan digital partnership

Sebastiano Toffaletti, Secretary General

# The challenge we share



- Dependent on foreign import for **>80% of digital technologies**
- **70% of cloud market** controlled by 3 US companies
- **Only 10% of global Semiconductor production**
- **Digital trade deficit:** €6.65 trillion (€38 billion) in 2024
- **US providers highly influential** in Japanese cloud market
- Once dominant semiconductor industry dwindled to **<10% market share**





# 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

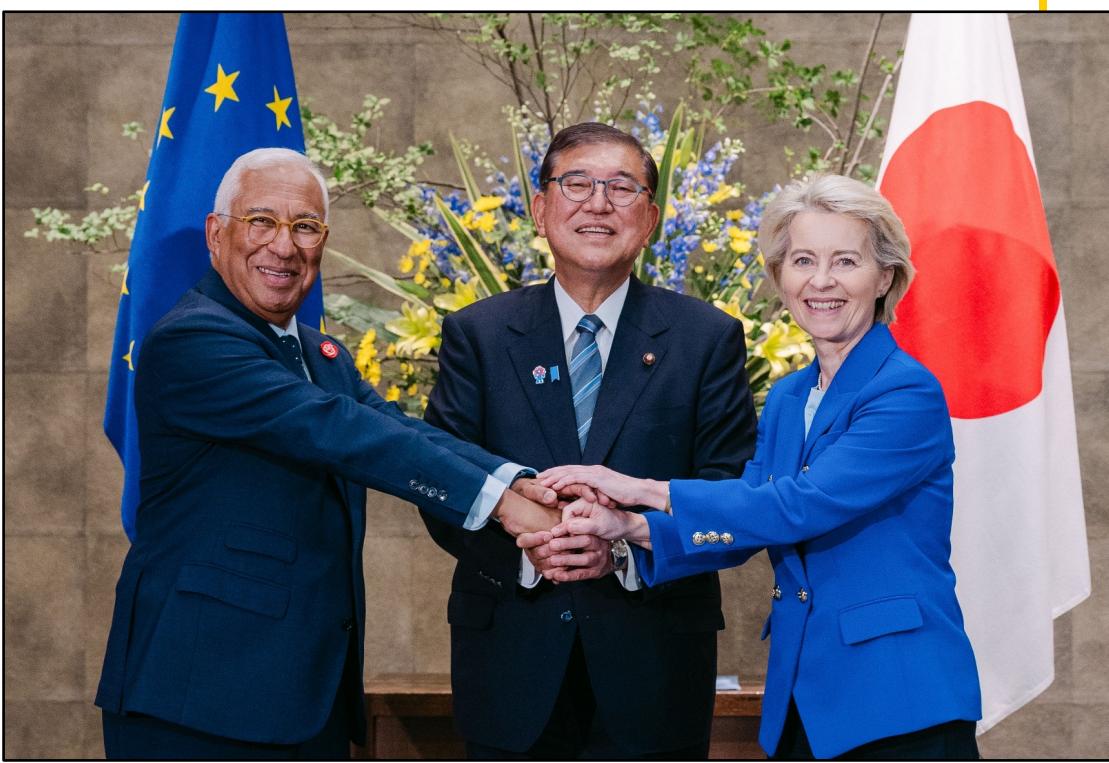
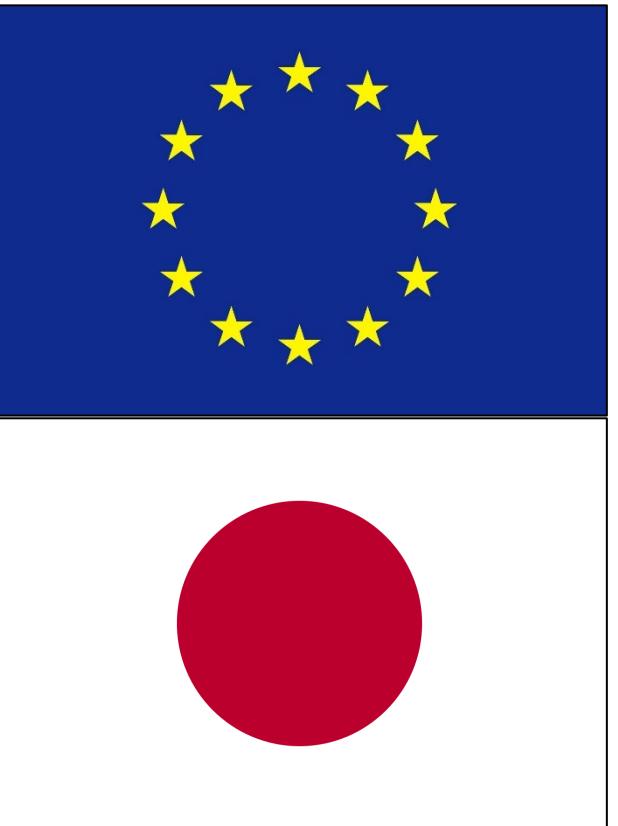
Europe: €200 billion for the AI Continent Strategy

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した

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