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How the EU cooperates its way into the global AI race:

An overview of the EU's AI partnerships with 12 countries

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Executive summary

1 This paper maps the cooperation of the European Union (EU), its member states, European companies, and research institutes on artificial intelligence (AI) with twelve partner countries: the United States (US), China, the United Kingdom (UK), India, South Korea, Japan, Canada, Singapore, Taiwan, Malaysia, the United Arab Emirates (UAE), and Israel. It covers collaborations in infrastructure, research and talent development, commercial partnerships and investment, and government agreements and regulatory cooperation. While the EU is often seen as lagging in AI, this research shows it is a sought-after partner in all these areas, with external collaborations serving as an important catch-up strategy.

2 International cooperation enables the EU to access compute, capital and frontier AI systems it lacks domestically. However, as foreign investors finance and often build Europe's new data centers, control over these facilities depends on the terms each member state negotiates. Washington can withdraw access to the most capable American models with a decision, as happened in June 2026 with Anthropic's most advanced models. Some European research programs and suppliers take part in systems in Israel and China that may be tied to surveillance or military uses, which are contrary to EU's rules or interests. Cooperation with partner countries is therefore essential, but it can also create strategic dependencies that need active management. Cooperation should therefore be seen as a complementary means of developing the EU's own AI capabilities, not a substitute.

3 The EU's strengths lie in public computing infrastructure, skilled personnel, and development of regulatory frameworks. The EU has introduced the world's first comprehensive AI law, operates some of the world's fastest public supercomputers, and has more AI professionals per capita than the US or China. By contrast, its weaknesses include limited frontier-model development, slow AI adoption, scarce private investment, and dependence on US models, cloud services, and hardware.

4 The European Commission's AI Continent Action Plan of April 2025 aims to overcome these weaknesses through developing public AI Factories and Gigafactories and promoting strategies for data, talent, and AI adoption. However, critics doubt whether public computing resources are sufficient, timely, and aligned with demand. Adoption, funding, and computing capacity are also concentrated in a small number of Western member states, and much of Central and Eastern Europe remains behind.

5 Foreign capital finances most of Europe's new AI data centers, with American investors providing the largest share, followed by Japan and Canada. Hardware from the American chip designer Nvidia is used in nearly every AI infrastructure project. The EU's public supercomputers are built on Japanese and American systems, with European firms working as assemblers and operators. In the semiconductor supply chain, the EU leads in photolithography equipment. AI servers are assembled in Europe by companies such as Taiwan's Foxconn in Czechia and France's Bull in Angers.

6 Foreign companies are increasingly establishing AI laboratories at European universities and research institutes. Conversely, European companies also open laboratories in Asia and North America. Health and life sciences are the largest area of research cooperation with partner countries, followed by telecommunications and manufacturing. Most skilling programs in Europe come from American companies, led by Microsoft, Google, OpenAI, and Amazon Web Services, and the largest non-American one is Huawei's Seeds for the Future.

7 Indian IT services firms operate the IT systems of many European companies, which increasingly involve AI. China is currently the main partner in automotive AI applications, as some German carmakers develop AI for their Chinese models in joint ventures with Chinese companies. American investors provide most of the foreign capital raised by European AI startups, and European investors mainly fund startups abroad in the UK, Israel, the US, and India. EU companies mainly supply specialized AI systems to governments outside the EU, such as for defense, transport and public administration.

8 EU institutions cooperate on AI with Japan, South Korea, Singapore and Canada through respective Digital Partnerships. Since 2022, the EU has structured its AI dialogue with India through the Trade and Technology Council. The Trade and Technology Council with the US is no longer active, but the EU Commission said in April 2026 it was in talks with Washington to set up a new dialogue on digital technologies and markets. AI is also a cooperation area in the Strategic Partnership Agreement with the UAE, under negotiation since December 2025. France, Germany, and Poland are the most active member states in bilateral AI diplomacy, and India, the UAE, and Canada have signed the most agreements with individual EU member states.

9 The US is both the primary enabler and main partner of European AI, as well as its largest potential strategic vulnerability. It provides the compute, models, and enterprise software that underpin European business, and its systems are more deeply integrated into European defense than those of any other partner. Washington, however, increasingly treats model capability and access to advanced AI chips as a national security asset.

10 Besides the US, the UK is the EU's closest partner, participating in Horizon Europe and the EU supercomputing network. Canada is also an important research partner, particularly in health and life sciences. Cohere, Canada's leading frontier

model developer, is merging with the German company Aleph Alpha to create a transatlantic sovereign AI provider.

11 Taiwan produces the world's, including Europe's, AI servers and graphics processing units (GPUs). Taiwan also cooperates closely with Central and Eastern European countries, especially Czechia. South Korean memory makers Samsung and SK Hynix, as well as Taiwan's TSMC, depend on extreme ultraviolet lithography machines from the Dutch company ASML. ASML in turn counts them among its largest customers.

12 Japan is a close partner in the buildup of the European data centers, where its firms invest in significantly. Furthermore, Japanese suppliers are providing crucial parts for the European High-Performance Computing Joint Undertaking (EuroHPC) supercomputers infrastructure.

13 China is the main partner in development and deployment of AI for the automotive sector. Chinese cloud providers, namely Tencent Cloud and Alibaba Cloud, are expanding their data center footprint and AI services across the EU. However, only a few member states are actively deepening formal ties with China on AI because of growing security and competitiveness risks posed by China's AI development and related sectors.

14 Beyond regulatory cooperation, India's IT services firms manage systems for European companies and provide services necessary for successful AI implementation in business operations.

15 The UAE invests capital in French and Italian data centers, while actively balancing its approach to AI by maintaining ties to both Washington and Beijing. Singapore also balances between both AI superpowers and serves as the Southeast Asian base of European firms. In Malaysia, European firms mainly supply renewable power, network equipment and AI training to the growing data center industry.

16 The EU has commercially beneficial AI cooperation with Israel, especially at the start-up level. But the intertwined nature of civilian and defense AI development in Israel creates risks for the EU that EU-funded or EU-developed technologies might be deployed in ongoing Israeli military operations.

17 South Korea is the only partner with a binding cross-sectoral AI law, which borrows the AI Act's risk-based terms but has no prohibited practices and far lower fines. Japan and Taiwan have framework laws without penalties; China has binding rules for specific services, such as generative AI and deepfakes; and other partners rely mostly on existing laws and voluntary guidance. Most signatories of the EU's General-Purpose AI Code of Practice are US companies, but no Chinese developer has signed it, even though Chinese open-weight models are increasingly deployed in the EU.

Introduction

Artificial intelligence (AI) is emerging as a general-purpose technology, transforming all sectors of the economy and society, ranging from scientific discovery and industrial development to public administration and defense.[1] A 2024 report on European competitiveness by former European Central Bank president Mario Draghi identified weaknesses in Europe's innovation ecosystem, including barriers to turning research into commercial products and helping innovative firms grow. It framed AI adoption in European industry as an opportunity to boost productivity and maintain competitiveness. The report found Europe trailing the United States (US) and China in AI, yet the European Commission has argued that the race for global AI leadership is far from over and has set the goal of making Europe a global leader in both the development and adoption of the technology.[2]

The Commission's president, Ursula von der Leyen, describes European AI as essential to the European Union's (EU) independence, as the technology is expected to power its industries and societies, including defense.[3] For Brussels, the ability to develop, access and deploy advanced AI is therefore increasingly tied to economic competitiveness, technological sovereignty and security. International cooperation helps build these capabilities by connecting European research and industry with computing infrastructure, models, investment, and expertise abroad. However, the terms of that cooperation shape which capabilities European actors develop themselves, which they obtain from others, and how much their continued use depends on decisions made outside the EU.

The US and China compete over AI development and its adoption abroad. American firms lead in capital and frontier models, with private AI investment more than twenty times China's in 2025, while China publishes more AI research, files more patents, and installs more industrial robots.[4] According to an analysis published by Epoch AI in January 2026, leading Chinese AI models typically matched the capabilities of leading American models about seven months later.[5] Since October 2022, Washington has restricted Chinese access to advanced chips and semiconductor manufacturing equipment, citing their potential contribution to military AI.[6] Beijing responded with a state-backed push for self-reliance in chips and models, and with export controls on rare earths, gallium, and germanium, which it eased under a trade truce in late 2025.[7] In January 2026, Washington allowed export licenses for Nvidia's H200 chips, a generation behind the current Blackwell series but the most powerful hardware China can legally import.[8] Beijing, which has steered state-funded data centers toward domestic chips, initially held its companies back and, since summer 2026, has let selected firms import limited quantities, less than 1% of Nvidia's data-center revenue in the quarter to July.[9]

Abroad, the American AI Exports Program, established by an executive order in July 2025, supports industry-led consortia seeking to export US AI technology packages, including chips and other AI hardware, cloud services, models and applications, with federal financing and other support, including loans, guarantees and political-risk insurance. The packages must comply with US export controls and other relevant requirements. The order explicitly aims to reduce international dependence on AI technologies developed by US adversaries.[10] China's Global AI Governance Action Plan of July 2025, by contrast, emphasizes international cooperation on computing infrastructure, open-source AI, and technical standards, particularly to expand access to AI in developing countries.[11] By March 2026, China's Alibaba open-weight Qwen models accounted for more than half of global open-model downloads on the developer platform

Hugging Face.[12] For third countries, including EU member states, buying chips, cloud services, or models from either side now comes with political as well as commercial conditions.

The EU finds itself squarely in the middle of this rivalry, balancing opportunities for cooperation with emerging dependencies. American companies supply much of the computing infrastructure, with Amazon, Microsoft, and Google accounting for about 70% of the European cloud infrastructure market in mid-2025, giving them influence over the prices, services and technical conditions available to European customers.[13] European cooperation with China includes joint research and corporate laboratories, although documented links to military institutions and surveillance applications complicate decisions about which partnerships to maintain.[14] The EU's stated approach combines reducing critical dependencies with continued engagement with China.[15] European actors therefore face overlapping objectives: maintaining access to American technology, assessing the security implications of cooperation with China and developing capabilities that give them greater choice over their suppliers.

Research on AI middle powers finds that countries with established research institutions and specialized industries still depend on capabilities concentrated in the US and China. Reproducing every component domestically is costly and, in the near term, often impractical. Joint investment can spread the cost of computing infrastructure, shared research can combine expertise unavailable within one country, and specialization in technologies that partners need can give a country bargaining power despite its dependence in other areas.[16]

Although the EU has greater collective resources than an individual middle power, these findings still apply, as individual member states retain discretion over most activity. Cooperation allows the EU to build on its existing strengths while accessing complementary capabilities, rather than bearing the cost of developing each component separately. Its value, therefore, depends on what European actors gain beyond immediate access to technology, including knowledge, infrastructure and supply chain. Partnerships that provide these benefits can increase Europe's capacity to make its own technological choices, even where dependence on foreign suppliers remains.

Cooperation also carries risks that extend beyond dependence on technology suppliers. In defense, reliance on an external provider can create dependency on software updates and technical support needed to keep systems operational.[17] Research on target tracking or biometric recognition can enable military targeting or abusive surveillance, making the institutions involved and the intended uses relevant to cooperation decisions.[18] Data-center investments add electricity and cooling-water demands to host countries, so the expansion of computing capacity also needs to be assessed against energy availability and environmental commitments.[19] These considerations require attention to how partnerships operate, how their outputs are used, and the capabilities they promise to deliver.

This paper examines how EU actors across institutional, governmental, academic, and business domains cooperate internationally on AI, what each partner contributes, and the opportunities and dependencies these relationships create. The aim is to analyze emerging patterns in AI cooperation, assess whether it may help address gaps in European capabilities and identify potential risks and dependencies.

The paper draws on an original dataset of publicly announced initiatives involving EU institutions, member states, companies, universities and research institutes and their counterparts in twelve countries: Canada, China, India, Israel, Japan, Malaysia, Singapore, South Korea, Taiwan, the United Arab Emirates (UAE), the United Kingdom (UK), and the US. It covers cooperation in both directions, including foreign investment, infrastructure build-up, commercial ties, training programs and research in Europe and European activity abroad, wherever AI is a named or central component of the cooperation. The evidence is interpreted qualitatively, since a government

memorandum, a joint laboratory and a data-center investment differ in purpose and scale. The mapping does not claim to capture every partnership or measure the outcomes of every initiative. The appendix includes the dataset's methodology and an explanation of its limitations.

Chapter 2 examines the scope of the EU's current AI capabilities and the policies intended to develop them. Chapter 3 organizes cooperation by activity type, covering computing infrastructure, research and talent development, commercial partnerships and investment, and government agreements and governance initiatives. Chapter 4 examines each of the twelve partner countries, summarizing each country's approach to AI, its cooperation with European actors, and the associated benefits and risks.

Chapters 3 and 4 overlap deliberately to accommodate different readers. Those interested in a particular activity, such as data-center investment or joint research laboratories, can refer to Chapter 3 to compare cooperation across partners. Readers interested in a particular country can turn to Chapter 4 for an account of that relationship across the different activities. Relevant cases therefore appear in both chapters, allowing each section to provide the context needed and function as a standalone text. The conclusion summarizes findings and offers policy recommendations.

The EU's AI Partnerships Tracker

The EU's AI Partnerships Tracker is a public database of cooperation involving AI between the EU and twelve partner countries. It records who is working with whom, on what, since when, and who finances it, from intergovernmental declarations and joint research laboratories through commercial partnerships to investment, acquisitions and the data centers being built on European soil.

The tracker currently holds approximately 1,700 records of cooperation. It records links if the cooperation involves, on the European side, at least one EU member state, an EU institution (e.g., European Commission or the EuroHPC Joint Undertaking), or a company, university or research institute based in the EU. On the other side, it involves an entity from one of the twelve partner countries:

- Canada
- China
- India
- Israel
- Japan
- Malaysia
- Singapore
- South Korea
- Taiwan
- United Arab Emirates
- United Kingdom
- United States

The dataset is built from publicly available sources, including government communications, company announcements, research funding databases and news reporting, using structured, systematic and controlled LLM-assisted extraction combined with human verification and follow-up searches. This is a research dataset, not a ranking. Entries vary enormously in weight and importance, since a multi-billion-euro data center, a university joint laboratory and a government memorandum each count as a single record. Aggregating them into totals or percentages would flatten differences that matter, so the analysis behind the Tracker identifies patterns and cites specific figures only where they add meaning.

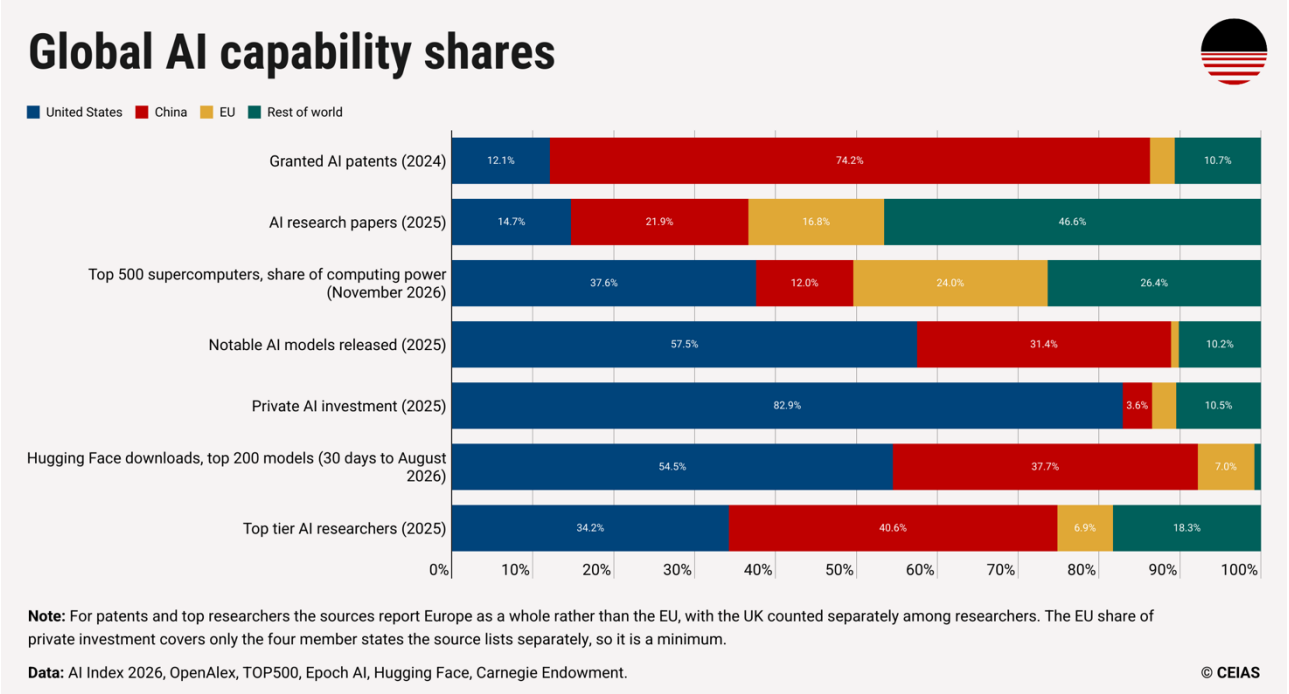
Visit the EU's AI Partnerships Tracker here or follow the QR code. ⟶

Where the EU stands in AI capabilities

This chapter outlines the EU's strengths and weaknesses in AI, and the policies and instruments designed to strengthen its AI capabilities. The EU enters the AI competition with several assets, including a strong scientific and talent base, large industrial and public-sector datasets, advanced capabilities in parts of the semiconductor and industrial technology supply chain, an expanding network of publicly funded computing infrastructure and the most developed regulatory framework for AI. The AI Act is the world's first comprehensive AI law,[20] and three European High-Performance Computing Joint Undertaking (EuroHPC) supercomputers stood in the global top ten of the November 2025 TOP500 list.[21] Europe (UK excluded) ranks third globally in AI talent production, behind China and the US, and boasts a 60.1% AI talent retention rate. According to a 2023 report, Europe also has about 30% more AI experts per capita than the US[22] and three times as many as China.[23]

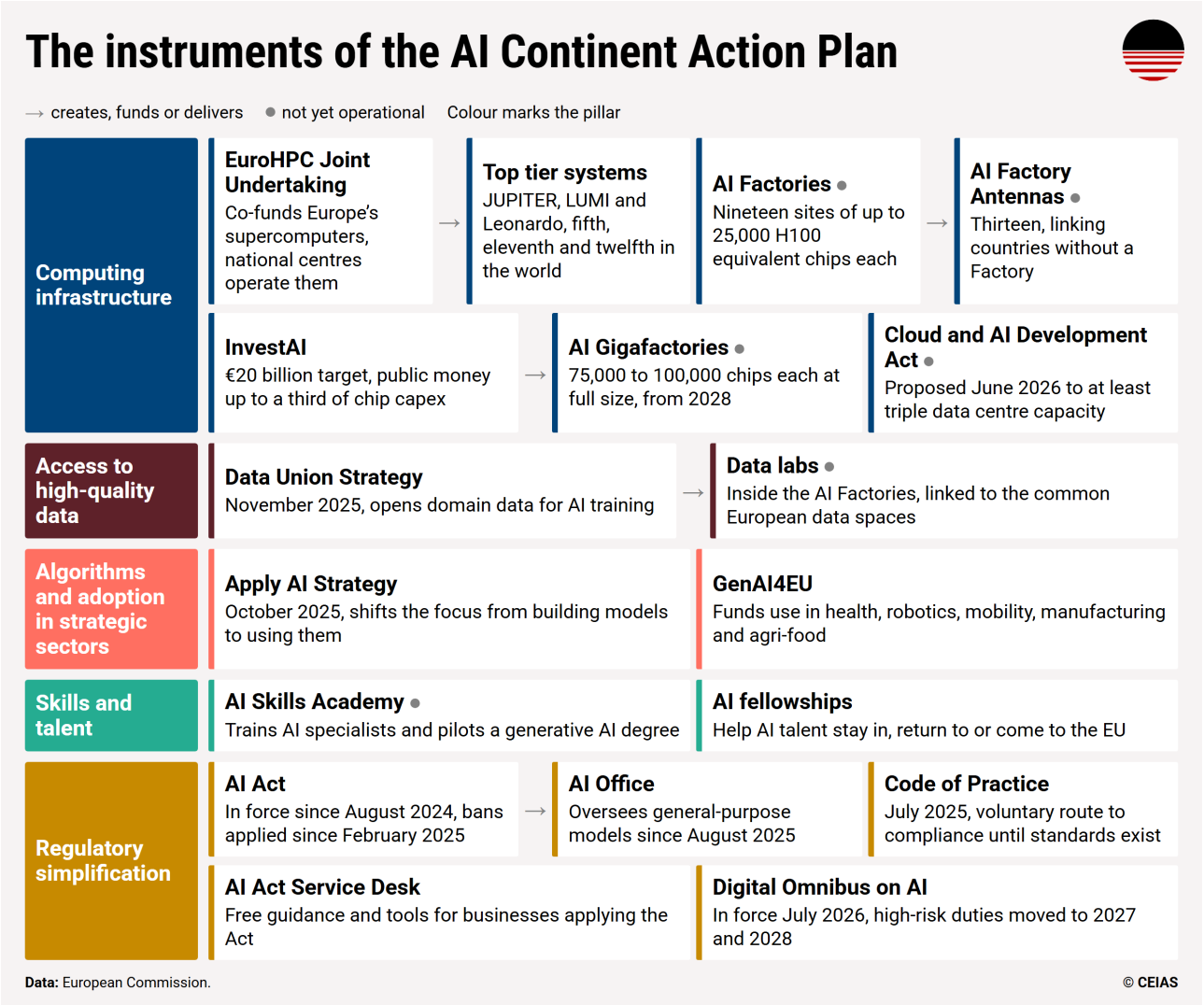
Meanwhile, the EU lags in training and deploying frontier models. EU labs produced one notable model in 2025, compared with 59 in the US and 35 in China.[24] Only 20% of EU enterprises with ten or more employees used AI that year.[25] Private investors put about €253 billion into American AI companies in 2025, compared with roughly €18.5 billion into European ones, a gap of nearly fourteen to one.[26] The EU also holds only about 5% of global high-end AI supercomputing capacity, compared with roughly 75% in the US and 15% in China.[27] The EU remains heavily dependent on American cloud infrastructure, with Amazon, Microsoft and Google holding 70% of the European cloud market. American companies also dominate AI chip design.[28]

Mario Draghi's September 2024 report on European competitiveness documented a widening productivity gap with the US, driven mainly by digital technology. It argued that the EU's regulatory stance toward technology companies, with about 100 technology-focused laws and over 270 regulators, hampers innovation.[29] The Commission's 2025 Competitiveness Compass adopted the



Note: For patents and top researchers the sources report Europe as a whole rather than the EU, with the UK counted separately among researchers. The EU share of private investment covers only the four member states the source lists separately, so it is a minimum.

Data: AI Index 2026, OpenAlex, TOP500, Epoch AI, Hugging Face, Carnegie Endowment. © CEIAS



three imperatives Draghi identified: closing the innovation gap; a joint roadmap for decarbonization and competitiveness; and reducing excessive dependencies and increasing security, and placed its AI measures under the first.[30] The April 2025 AI Continent Action Plan translated these measures into five pillars: computing infrastructure, access to high-quality data, adoption in strategic sectors, skills and talent, and simpler implementation of the AI Act.[31] In February 2025, Commission President von der Leyen presented the planned computing investments as a public-private partnership "akin to a CERN for AI," built so that "every company, not only the big players" could access the computing power it needed, pledging to put Europe's public supercomputers at the service of its best start-ups and scientists.[32]

Catching up in compute infrastructure

The EuroHPC Joint Undertaking, created in 2018 and based in Luxembourg, implements the Action Plan's compute pillar. It coordinates and finances the procurement of Europe's supercomputers, which national hosting entities operate, pooling EU funding with contributions from participating states.[33] The flagship JUPITER, inaugurated at Jülich in Germany in September 2025, is Europe's first exascale machine, and it ranked fourth on the November 2025 TOP500 list, with LUMI in Finland ninth and Leonardo in Italy tenth.[34] EuroHPC has selected nineteen AI Factories, complemented by thirteen AI Factory Antennas that connect countries without a Factory to the main sites.[35] Above the Factories, the EU plans up to seven AI Gigafactories for

training the largest AI models.[36] Besides the EU member states, Israel and the UK are also part of the Joint Undertaking, alongside several European neighbors and accession candidates, while India and Japan take part through EuroHPC-funded research projects.[37] The EU can thus offer external partners access to public compute.

The Commission proposed the Cloud and AI Development Act in June 2026 to complement the AI Factories and Gigafactories with a wider expansion of cloud and data center infrastructure. It aims to at least triple EU data center capacity within five to seven years. The proposal would simplify permitting, improve access to energy, land and financing, and support a more geographically balanced deployment across member states. It would also establish four sovereignty assurance levels for cloud services, ranging from basic data-location requirements to full EU control over operations and software supply chains. Public authorities would select the appropriate level based on risk assessments. The third level, normally requiring EU ownership and control, would also be open to providers controlled from Commission-recognized third countries, subject to safeguards against foreign interference and reciprocal market access.[38]

Data centers in the EU consumed about 70 terawatt hours of electricity in 2024, and their consumption is projected to reach 115 terawatt hours by 2030.[39] By mid-2025, grid constraints had effectively halted new data center connections around Dublin, Amsterdam and Frankfurt, while France remained the only major European data center market with relatively unconstrained grid capacity.[40] The EU has responded with regulation: the Energy Efficiency Directive requires large data centers to report their energy performance and water footprint to a European database, and the Code of Conduct for Data Centers sets voluntary best practices.[41] The Commission also adopted a delegated regulation creating a sustainability rating and label for data centers in September 2026, and the first labels are due by August 2027.[42]

The strain is concentrated in a few hubs, as data centers, for example, used 22% of Ireland's metered electricity in 2024, up from 5% in 2015.[43] Developers in Frankfurt, London, Amsterdam, Paris, and Dublin wait seven to ten years, on average, for a grid connection.[44] In December 2025, Ireland lifted its moratorium on new data center grid connections and introduced a conditional approval framework. New facilities must provide dispatchable generation or batteries, on site or nearby, that match their grid capacity and sell into the wholesale electricity market. It must also cover at least 80% of its annual demand with new renewable electricity generated in Ireland.[45]

Water is another constraint in dry regions such as Aragón in Spain, where the US company Amazon's three planned data centers are licensed for about 755,720 cubic meters a year, enough to irrigate around 233 hectares of corn. In December 2024, Amazon asked to raise water use at its three existing sites in the region by 48%, three months before the regional government asked for EU aid to tackle its drought.[46] Member states have responded with national rules, and since January 2024, the Netherlands has allowed new hyperscale campuses in only two municipalities.[47] Germany requires data centers opening from July 2026 to reuse at least 10% of their energy, rising to 20% from July 2028,[48] and Spain opened a consultation in August 2026 on a draft decree that would cap their water use.[49] In the first year of the Energy Efficiency Directive's reporting duty, only about a third of data centers reported.[50]

In scale, each AI Factory is specified at up to 25,000 H100-equivalent chips, and each Gigafactory at a minimum of 100,000. These capacities are small compared with US projects such as Colossus, the supercomputer of the US company xAI, which has around 230,000 AI chips and is targeting a million H100 equivalents by 2029.[51] Under the InvestAI initiative, the EU plans to allocate up to €10 billion in public funding for AI gigafactories, split between the EU and member states, alongside at least €20 billion in expected private investment.[52] By comparison, major US hyperscalers are projected to spend about $800 billion in capital expenditure in 2026 alone, including investments beyond AI infrastructure and outside the US.[53] After two postponements, EuroHPC launched the call for AI Gigafactories in July 2026, with projects expected to be selected

in early 2027 and become operational within 18 months of selection. Critics say this pace undercuts the Commission's claim that Europe must urgently catch up with the US and China.[54]

Demand for the Gigafactories remains uncertain, as Europe's leading frontier AI laboratory, France's Mistral, is securing substantial computing capacity outside the public system and is targeting 500,000 H100 equivalents in 2026. One potential solution is a multi-client model that aggregates the low- to moderate-workload needs of companies, start-ups and academia instead of relying on a single large customer.[55]

More fundamentally, matching the scale of US computing infrastructure would require around €150 billion annually, as the latest AI chips become technologically obsolete in less than a year, putting such investment beyond the EU's financial means. Smaller, specialized models could instead deliver substantial productivity gains at far lower cost.[56] One example is TildeOpen LLM, developed by the Latvian company Tilde for smaller European languages, with more than 30 billion parameters and trained on the LUMI and JUPITER supercomputers.[57]

Training the frontier models

The cost of training a frontier model has grown about 2.5 times a year since 2016, and training the largest models is expected to cost more than €900 million each by 2027. As a result, only a few firms can raise enough capital to train frontier models.[58] In Europe, the best-funded of them is France's Mistral, which raised €3 billion at a valuation of more than €21 billion in September 2026, the largest equity round ever completed by a European technology company.[59] On the other hand, Germany's Aleph Alpha shifted its business away from training large language models (LLMs) towards software that helps firms deploy AI in September 2024, when its chief executive said that a European model alone "doesn't justify the investment,"[60] and in April 2026 it agreed to merge with Canada's Cohere.[61] Other European developers work on narrower models. For example, Black Forest Labs in Germany released open image models and raised about €260 million in December 2025 at a valuation of about €2.8 billion.[62]

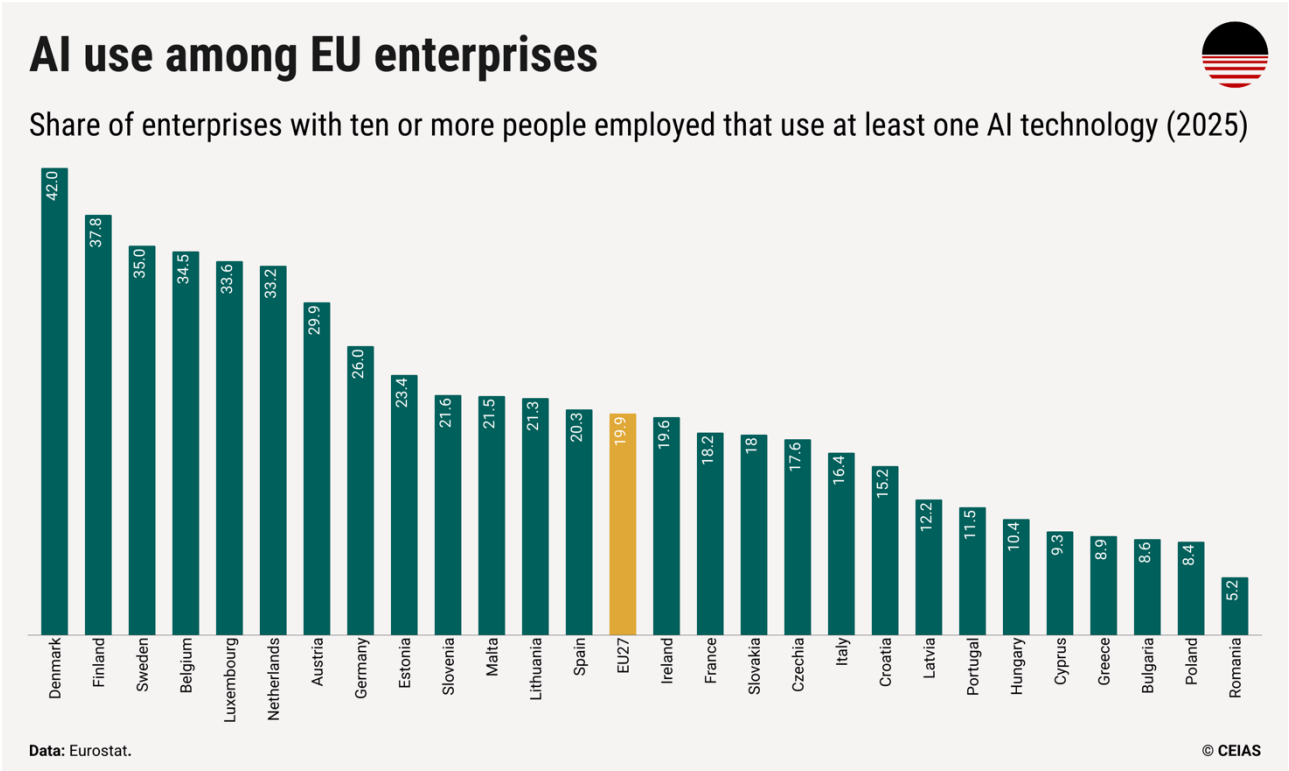
Language models have grown more capable largely by training on more text, measured in tokens, the word fragments that models process. The public web holds only about 300 trillion tokens of usable, human-written text, and if training datasets keep growing at the current pace, the largest models will eventually be trained on all of it sometime between 2026 and 2032.[63] For most European languages, that limit is far closer. English makes up about 40% of the pages in Common Crawl, the free web archive that most LLMs draw on, compared with 0.09% for Latvian, 0.007% for Irish and 0.003% for Maltese.[64] The Alliance for Language Technologies European Digital Infrastructure Consortium (ALT-EDIC), the language technology alliance the Commission established in February 2024, acknowledges the limitations of training LLMs for languages with fewer than 10 million speakers.[65] Domain-specific data, which the Commission's November 2025 Data Union Strategy calls a defining factor of competitiveness in AI, is also hard to access. Much of it remains siloed or underused, partly because of a patchwork of data rules, and firms are reluctant to share it for AI training. The strategy proposes data labs inside AI Factories, secure environments that connect AI developers to common European data spaces in healthcare, manufacturing, energy, and climate.[66]

Weak in adoption, strong in talent training

European firms are catching up with their US counterparts in AI adoption, with 37% of EU firms reporting generative AI use in 2025, compared with 36% in the US. However, American firms integrate AI across a wider range of business functions.[67] AI use also depends on company size, as 55% of large EU enterprises used AI in 2025, compared with 17% of small ones.[68] Among EU firms that considered AI but did not adopt it, they cited a lack of expertise (70.9%), unclear legal consequences (52.5%), and data protection and privacy concerns (48.8%). The Commission's Apply AI Strategy (October 2025) and the GenAI4EU funding line aim to close this gap by emphasizing AI deployment in health, energy, mobility, manufacturing, agri-food, and the public sector, rather than model development alone.[69]

Europe's strength in AI lies in its talent pool, but it struggles to retain it. The US has traditionally been a major destination for European AI talent, partly because AI salaries are typically 30 to 70% higher than in most of Europe.[70] At the same time, Europe is attracting fewer tech workers from abroad. Net inflows of tech workers to Europe fell from around 52,000 in 2022 to 26,000 in 2024, largely because fewer arrived from India, and they approached zero for senior talent.[71] However, early signs suggest the trend may be reversing. The number of AI researchers and developers moving to the US has dropped by 89% since 2017, and between April 2024 and September 2025, for the first time in the period examined, more AI professionals moved from the US to Europe than the other way around.[72] It remains to be seen whether this represents a durable reversal or a temporary reaction to US visa policy.

AI workers with degrees from China are also leaving Europe as Beijing works to draw them home; in France, for example, their share of the AI workforce fell from 6.2% to 4.5% between April 2024 and September 2025.[73] China's Huawei, through its Nordic Talent Bridge, recruits doctoral students and postdocs from Nordic countries to its research centers in China and Hong Kong, with AI among its core fields.[74] In contrast, Indian citizens received more than 227,000 first residence permits in the EU in 2025, second only to Ukrainians and well ahead of Chinese and American citizens.[75] Among AI professionals, the share of those with Indian degrees across EU



member states rose from 7.7 to 8.3% between April 2024 and September 2025, reaching 29.8 in Ireland.[76] The EU-India trade agreement, whose negotiations concluded in January 2026, includes provisions for the temporary entry of Indian independent professionals in seventeen sectors, including computer services and research and development, alongside a separate memorandum on the mobility of skilled workers, students and researchers.[77]

AI talent and AI adoption are also unevenly spread across the member states, with the widest gap between the Nordic countries and Central and Eastern Europe. In 2025, 42% of enterprises in Denmark, 37.8% in Finland, and 35% in Sweden used AI, compared with 5.2% in Romania, 8.4% in Poland, and 8.5% in Bulgaria.[78] This widening gap in AI adoption reinforces differences between the countries and may weaken convergence within the single market. The divide stems from uneven concentrations of ICT specialists,[79] weaker research capacity,[80] and limited funding, as fewer than half of the member states have a dedicated AI budget.[81]

AI funding is also highly concentrated in both private capital and public budgets. More than two-thirds of European AI venture capital between 2020 and 2025 went to only ten metropolitan areas, led by Paris with about €8 billion.[82] In the first half of 2026, 73% of the roughly €20 billion raised by European AI companies went to 38 firms that closed rounds of about €90 million or more.[83] Furthermore, funding for start-ups in Central and Eastern Europe fell again in 2025.[84]

Similarly, public commitments differ by two orders of magnitude between member states. Germany allocates between €483 and €625 million annually to AI between 2018 and 2025, while France reported around €4 billion in AI investment commitments for 2022 to 2025. By contrast, Estonia allocates €31.7 million a year, Slovenia €22.5 million and Cyprus, Denmark and Malta between €2.5 and €5 million. As of 2025, the EU hosted 132 supercomputers on the TOP500 list across nineteen member states, but computing capacity is equally concentrated: Germany accounted for 38, France for 24, and Italy for 14, while eight member states had none. Efforts to attract talent are also uneven: only about a quarter of member states have programs to attract or retain AI researchers, and only Finland and Slovenia report structured efforts to recruit AI professionals for private-sector roles.[85]

Europe's regulatory power in AI

The EU has taken a different approach to AI governance from most of its partners, regulating the technology through a single binding law. The AI Act, in force since August 2024, takes a risk-based approach, bans a limited number of uses, imposes strict requirements on high-risk systems, and requires broader transparency obligations for other AI systems. Since February 2025, it has prohibited practices such as social scoring, emotion recognition in workplaces and schools, untargeted scraping of facial images to build facial recognition databases and, with narrow exceptions, real-time remote biometric identification in public spaces. Obligations for providers of general-purpose AI models have applied since August 2025 and are overseen by the AI Office, a new body within the European Commission.[86]

The rules for general-purpose models took effect before harmonized standards, leaving companies uncertain about how to demonstrate compliance with the Act. The Commission has acknowledged that standards for the rest of the Act are also delayed.[87] In July 2025, the chief executives of more than forty European companies, including aircraft maker Airbus, Dutch lithography firm ASML, and France's Mistral, called for a two-year pause in the Act's implementation.[88] Through the Digital Omnibus on AI, adopted in July 2026, the EU postponed the obligations for high-risk systems listed in the Act from August 2026 to December 2027, and for AI embedded in regulated products from August 2027 to August 2028.[89]

In July 2025, the Commission also published a General-Purpose AI Code of Practice, a voluntary instrument that model providers can sign to demonstrate compliance until harmonized standards are available. A second voluntary code, published in June 2026, provides guidance on marking and labeling AI-generated content under the Act's transparency rules.[90] The Act's international influence will depend partly on its implementation, including whether clearer rules give companies greater legal certainty and how compliance costs affect their decisions to develop and deploy AI in the EU.[91]

Most of the leading US and European model providers have signed the Code. By signing, providers commit to the Code's three chapters on transparency, copyright, and safety and security. Adhering to the Code is meant to reduce their administrative burden and provide them greater legal certainty.[92] The signatories include the US developers Amazon, Anthropic, Google, IBM, Microsoft, and OpenAI, meaning the instrument covers the suppliers of most general-purpose models deployed in Europe. European signatories include France's Mistral AI, LINAGORA and Pleias, Germany's Aleph Alpha and Black Forest Labs, and Italy's Almawave, Fastweb and Domyn, joined by Canada's Cohere and Israel's Bria AI.[93] Meta, however, declined to sign, arguing that the Code introduces legal uncertainty for model developers and imposes requirements beyond the AI Act's scope.[94] xAI, the developer of Grok, signed only the Safety and Security chapter, calling the copyright provisions "clearly an over-reach," and must therefore demonstrate compliance with its transparency and copyright obligations through what the Commission calls "alternative adequate means."[95] No China-based developer has signed the Code, so Alibaba, Moonshot, and DeepSeek remain outside the instrument even though their open-weight models are downloaded and deployed in the EU.[96]

The Act also applies to providers outside the EU. It covers any provider that places an AI system or general-purpose model on the EU market, whether or not it is established in the EU, as well as providers and deployers in third countries whose AI output is used in the EU. Third-country providers of general-purpose models must also appoint an authorized representative in the EU before placing their models on the market.[97] Google signed the Code but warned that the Act and the Code "risk slowing Europe's development and deployment of AI."[98] Meta had already withheld its multimodal Llama models from the EU in July 2024, citing "the unpredictable nature of the European regulatory environment."[99] Of 375 models released by Meta, Google, OpenAI and Anthropic between June 2018 and May 2026, 11% were delayed or not released in the EU. Across the EU and the UK, regulators cited regulation as the most likely cause in 56 of the 68 recorded cases, particularly data protection rules governing the use of personal data for training. The study found no strong evidence that the AI Act caused delays, as most of its provisions were not yet in force.[100]

Most EU partner countries have so far chosen lighter or less comprehensive approaches to regulating AI, and only South Korea has a binding, cross-sectoral AI law in force. The AI Basic Act, in force since January 2026, borrows the EU's risk-based and transparency terminology, but it contains no prohibited practices or pre-market conformity assessment. Fines are capped at about €17,500, compared with up to €35 million under the EU AI Act, and enforcement has been deferred for at least a year.[101] Japan's AI Promotion Act of May 2025 imposes no penalties and only a non-binding duty to cooperate with the government. Singapore still has no standalone AI law and relies on voluntary frameworks and sector-specific guidance.[102] Taiwan's AI Basic Act, passed in December 2025 and promulgated in January 2026, similarly sets out governance principles without any penalties. Future sector-specific rules will set detailed obligations based on a risk-classification framework the Ministry of Digital Affairs will develop.[103] In Canada, the Artificial Intelligence and Data Act died with the prorogation of Parliament in January 2025 and has not been reintroduced.[104] The EU's digital partnership councils commit Japan, Singapore, and Canada to exchanging information and cooperating on AI safety, and South Korea and Canada to exploring mutual recognition of conformity assessment results under the AI Act, but none commits partners to adopting EU rules.[105]

EU's AI strengths and weaknesses

Theme	Where Europe is strong	Where Europe is weak
Rules and standards	The AI Act is the world's first comprehensive AI law, and the leading US and European model providers have signed its Code of Practice.	The rules for general-purpose models applied before any harmonised standard existed, and the high-risk obligations slipped from August 2026 to December 2027.
Public compute	JUPITER, LUMI and Leonardo ranked fourth, ninth and tenth in the world in November 2025, and EuroHPC has selected nineteen AI Factories.	The EU holds about 5 percent of global high-end AI compute against 74 percent in the United States, and the first Gigafactories open in mid-2028.
Frontier models	Mistral raised €3 billion at a valuation of more than €21 billion in September 2026.	EU laboratories produced one notable model in 2025, against fifty nine from the United States and thirty five from China.
Data	The Data Union Strategy places data labs inside the AI Factories, linked to the common European data spaces.	Latvian makes up 0.09 percent of Common Crawl and Maltese 0.003 percent, and much industrial data stays siloed.
Adoption	The share of EU enterprises using AI rose from 13.5 percent in 2024 to 20 percent in 2025.	Only 13 percent of European companies call AI core to their business, against 49 percent in the United States and 83 percent in China.
Talent	The EU has about 30 percent more AI experts per capita than the United States.	AI salaries in the United States are 30 to 70 percent higher, and tech worker inflows to Europe halved between 2022 and 2024.
Capital	European AI companies raised roughly €20 billion in the first half of 2026.	Private investors put about €253 billion into American AI companies in 2025, against €18.5 billion into European ones.
Internal cohesion	Denmark, Finland and Sweden lead on adoption, with 42, 37.8 and 35 percent of enterprises using AI.	Adoption falls to 5.2 percent in Romania, and fewer than half of the member states have a dedicated AI budget.
External reach	The AI Act binds any provider selling in the EU, and the US frontier developers signed the Code on those terms.	No partner has adopted EU rules, and only South Korea has a binding cross-sectoral AI law.

Data: Authors' own compilation.

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The US has moved in the opposite direction, toward deregulation. On its first day in office, the Trump administration revoked its predecessor's executive order on AI, and in February 2025 Vice President JD Vance told the AI Action Summit in Paris that "excessive regulation of the AI sector could kill a transformative industry just as it's taking off."[106] In December 2025, the administration also set up a task force to challenge state AI laws, and its 2026 trade barriers report lists the AI Act's template for disclosing training data as a possible infringement of trade secrets.[107] China, by contrast, regulates generative AI through binding measures in force since August 2023, extended in September 2025 to cover labeling of AI-generated content.[108] The UAE has no general AI law and relies on a non-binding charter adopted in 2024.[109] Academic and policy assessments published in 2025 find that the Brussels effect, the EU's ability to shape global rules through the size of its market, has so far not materialized among the countries that lead AI development.[110] In AI, the Brussels effect thus functions as a market-access condition for companies entering the EU rather than as a model partner governments copy.

The different forms of cooperation

This chapter examines the different forms of AI cooperation between the EU and the twelve partner countries. Each of its four sections—compute infrastructure; research and talent; commercial partnerships and investment; and government agreements—describes the main partners, what each side contributes, and where dependencies arise.

Compute and AI infrastructure

Compute is a major constraint on AI development, since every frontier model is trained on large clusters of AI chips and every model runs in data centers that require land, power, and water on an ever-increasing scale. Whoever owns the hardware also sets the commercial and legal conditions for the companies and researchers that train, deploy and pay for AI. The EU, however, holds only about 5% of the world's AI supercomputing capacity, compared with roughly 75% for the US and 15% for China.[111] As a result, it relies heavily on foreign partners to expand its compute, and member states actively seek foreign investment in new data centers alongside the EU's own AI Factories.[112]

Regardless of which foreign partner builds data centers in the EU, the hardware almost always comes from Nvidia, whose Blackwell and Hopper platforms power over 90% of Europe's AI Factory build-out.[113] The few exceptions also rely on US chip designers, as the EuroHPC Lumi-AI supercomputer in Kajaani, Finland, built by the French supercomputer maker Bull, will use Advanced Micro Devices's (AMD) graphics processing units (GPUs) and processors,[114] and the US chipmaker Cerebras plans to bring its first European capacity online by the end of 2026, with sites in France, Norway and Finland and to reach 200 megawatts by the end of 2027.[115] While it is possible to diversify capital sources and construction providers, no viable alternatives to US-designed AI chips currently exist. More than 90% of AI accelerator compute comes from US designers, which leaves the EU, like the rest of the world, dependent on US-designed hardware.[116]

The US hyperscalers lead in the capital committed to European data centers:

- **Amazon** has raised its planned spending in Spain to €33.7 billion, centered on its cloud region in Aragón.[117]
- **Microsoft** has committed about €8.6 billion in Portugal, where, together with the British AI infrastructure company Nscale, it is the first tenant of the Start Campus site at Sines, a campus planned to reach 1.2 gigawatts by 2030.[118]
- **Google** is investing €5.5 billion in AI infrastructure and offices in Germany between 2026 and 2029.[119]

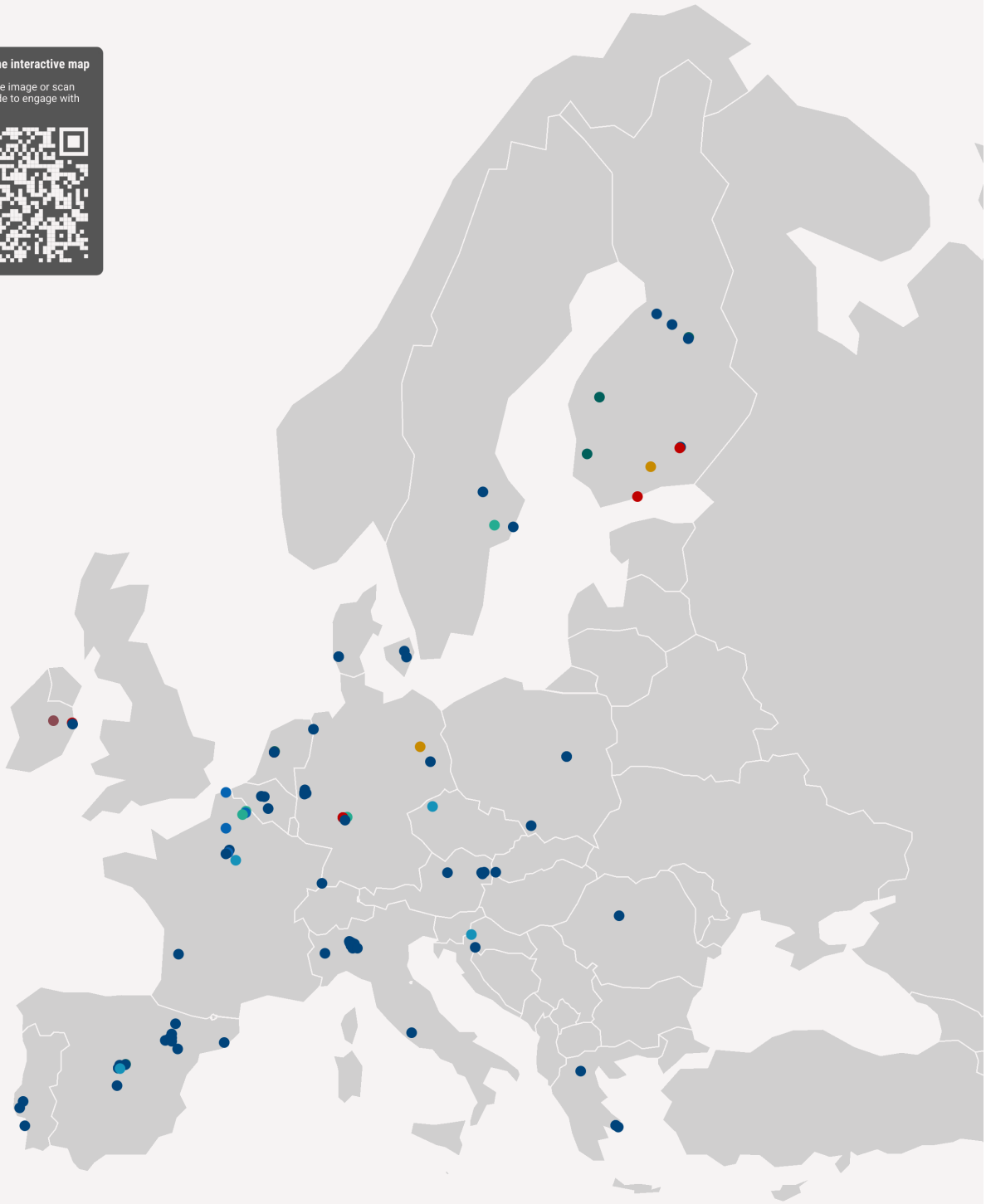
Some of these partnerships are framed as sovereign compute, such as AWS's European Sovereign Cloud, which launched its first region in Brandenburg, Germany, in January 2026, with a planned investment of more than €7.8 billion. It is separate from other AWS regions and operated exclusively by EU residents. The arrangement addresses European demands for data

New data centers and cloud regions in the EU built or financed by partner-country companies

Canada China Japan Singapore South Korea United Arab Emirates United Kingdom United States

Explore the interactive map

Click on the image or scan the QR code to engage with the data.



Note: One dot per new data centre campus in the EU, coloured by the country of its main investor. Expansions of existing sites and purchases are not shown.

Data: Authors' own compilation.

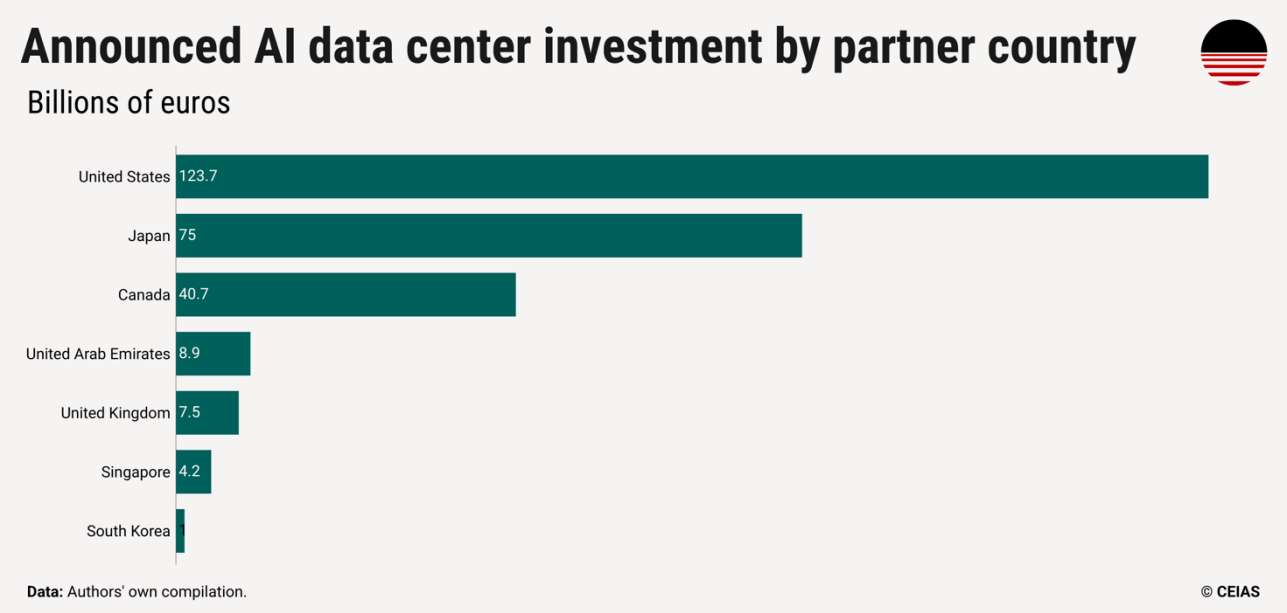
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localization, keeping customer content and their metadata in the EU, with separate billing, usage metering, and access management systems.[120] However, it reduces neither the dependence on American chips nor the reach of US law. The CLOUD Act of 2018 obliges communication and cloud service providers subject to US jurisdiction to preserve or disclose data in their possession, custody or control on a US order, regardless of whether the data is stored inside or outside the US.[121] A legal opinion written at the University of Cologne for the German interior ministry reached the same conclusion in 2025, finding that data stored in European data centers and managed through German subsidiaries remains open to US access as long as an American parent company controls it.[122]

Measured by the capital announced for data centers in Europe, as recorded in our dataset, US investors lead with about €124 billion, followed by Japan with €75 billion, almost entirely SoftBank's activities in France, Canada with about €40 billion, mostly through Brookfield, the UAE with about €9 billion and the UK with about €7.5 billion. These sums only illustrate the scale. However, not all projects disclose their funding and announced investments are not always carried out.

The UAE is investing in data centers in France, Spain and Italy. Most notably, France and the UAE signed a framework in February 2025 under which a consortium of French and Emirati investors, including the Abu Dhabi AI fund (MGX), will invest €30 to €50 billion in an AI campus in France, the largest dedicated to AI in Europe.[123] The project is a joint venture in which MGX holds more than half of the capital, alongside the French state investment bank Bpifrance, the French AI developer Mistral, and the US chipmaker Nvidia. The campus at Fouju, east of Paris, was reported to be valued at €8.5 billion and is expected ultimately to reach 1.4 gigawatts.[124] In June 2026, the partners announced plans for a second site and a goal of up to 3 gigawatts across France.[125]

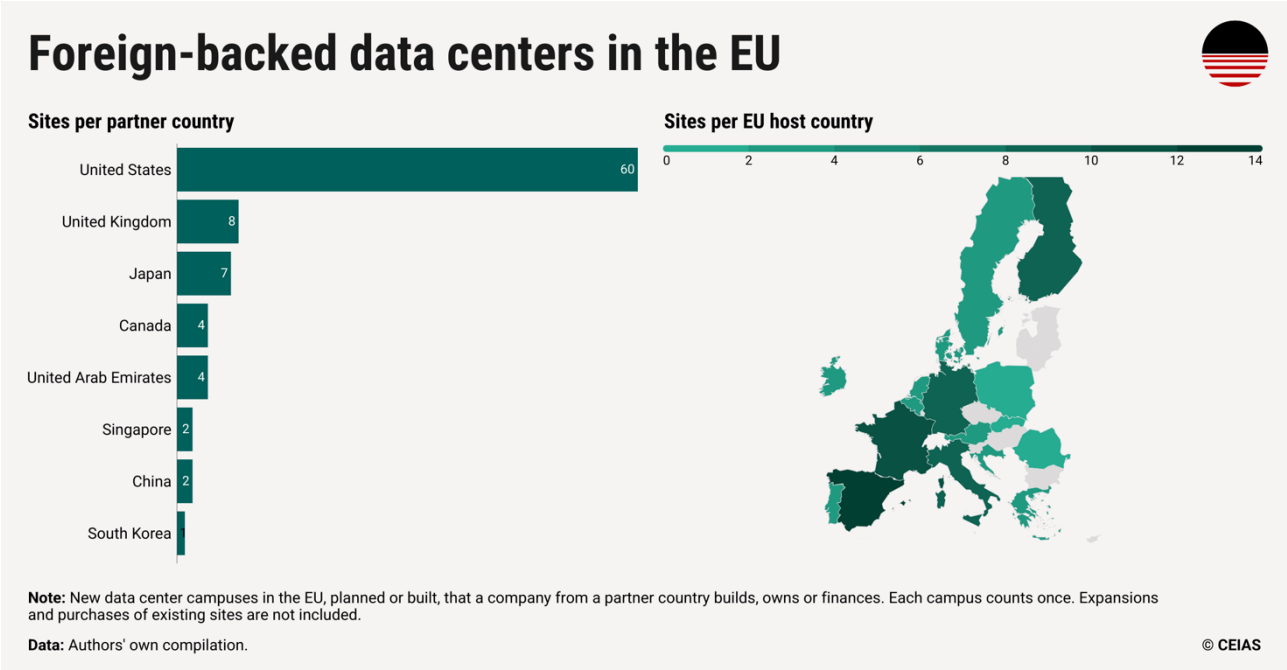
Chinese cloud providers also host customer data inside the EU. Alibaba Cloud has operated three data centers in Germany since 2022, the newest in Frankfurt,[126] and opened a French region in June 2026 with two availability zones in Paris.[127] Tencent Cloud announced a third availability zone in Frankfurt in March 2026, hosting data locally to meet European regulations.[128] The Chinese PC and server maker Lenovo has supplied several European HPC systems, including the Dutch national supercomputer Snellius.[129] Lenovo also supplied the compute hardware for Austria's multi-site national machine MUSICA,[130] and delivered Pitagora, a supercomputer hosted by Italy's CINECA used for European nuclear fusion research.[131] Lenovo AI systems include American processors from AMD or Intel and Nvidia accelerators. Chinese server manufacturer



Inspur Information also supplied hardware to the Erlangen National Center for High Performance Computing at Friedrich-Alexander-Universität in 2022 for its Alex supercomputer, in cooperation with German integrator MEGWARE.[132] Its parent company, Inspur Group, was placed on the US Entity List in March 2023, followed by Inspur Information itself in March 2025, for acquiring or attempting to acquire US-origin items for supercomputer projects of the Chinese government and military.[133]

Foreign investment in AI data centers is concentrated in a few member states, especially Germany, France, Spain and the Nordic countries. Germany hosts fourteen of the foreign projects recorded in our dataset, several of them in the Frankfurt area. Its investors include the US firms Microsoft, Google and Nvidia, Canada's Brookfield, Singapore's STT GDC and the Chinese firms Alibaba Cloud and iFLYTEK. France and Spain follow with thirteen each and Finland with nine. France draws capital from a diverse list of investors, including Japan's SoftBank, Emirati investors, Canada's Brookfield and US firms such as Microsoft. Spain's projectc are mostly financed by American investors. In Finland, British, Singaporean, US, Canadian and Chinese investors are building or buying sites, including Google's campus at Hamina. Sweden host five projects each, split between US and Canadian investors. By contrast, the dataset records no foreign data center projects in ten member states: Cyprus, Czechia, Estonia, Hungary, Latvia, Luxembourg, Malta, and Slovenia. Projects in these countries may exist without having been publicly announced.

In most foreign-financed data center projects, the foreign partner brings capital and technology, while European partners provide the land, grid connection, and electricity, which have become the scarcest resources for data centers in Europe. For example, EDF, the French state utility, is making selected former industrial sites available for large, power-intensive projects, and in May 2026 it chose the Japanese group SoftBank as preferred bidder to design, build, and operate a 400-megawatt data center.[134] In Finland, the power company Fortum, which began preparing the Harjavalta site with the town in 2024, agreed in April 2026 to support the British AI infrastructure company Nscale's planned data center there with grid connection design and permitting.[135] Grid operators decide whether and when a data center project can go ahead. For instance, in Croatia, the US-based Pantheon Atlas plans to invest more than €50 billion in a 1-gigawatt AI campus at Topusko, but could only start negotiating a grid connection agreement in July 2026, after the transmission operator HOPS approved its connection study.[136]



Some foreign-financed data center projects reuse existing industrial sites, which already have the land and the power connections that new developments struggle to obtain. In Poland, the developer DL Invest Group and its joint-venture partner Boosteroida are building a 300-megawatt campus for the Chicago-based AI cloud provider Argentum AI on a former Fiat engine plant at Bielsko-Biała, bought from Stellantis in 2024.[137] Waste heat from the sites also feeds into local energy systems, as in Finland, where the Singaporean operator DayOne is exploring integration into Lahti's district heating network.[138] Similarly, the British developer Pure DC will feed the waste heat from its Seinäjoki campus into the municipal network.[139]

Member states set the strategies and plans, but municipalities often grant binding permissions. In Strängnäs, Sweden, the Canadian asset manager Brookfield already owned property, but the additional land for its planned site depends on a land-allocation agreement with the municipality. The town will sell the land only if the company secures grid capacity within two years. By March 2026, that capacity had not been found, and Brookfield began looking at other Swedish sites.[140] In Spain, the 300-megawatt campus of the Florida-based developer EdgeMode in Castilla-La Mancha rests on a 24-month memorandum of understanding with the town council of Mora, with financing and permits still to be secured.[141]

The EU also builds its own compute through the EuroHPC Joint Undertaking, but access is largely closed to the analyzed countries. Only two of the 12 are members: Israel joined in October 2023, and the UK in May 2024.[142] The UK was also selected in October 2025 to host an AI Factory Antenna in Edinburgh.[143] Every other non-EU member of the program is a European neighbor or an accession candidate.[144] Japan and India participate only through EuroHPC-funded high-performance computing cooperation projects: HANAMI with Japan and GANANA with India.[145]

The hardware behind EuroHPC comes overwhelmingly from outside the EU, as shown by the six supercomputers procured under the Joint Undertaking.

- **Deucalion** in Portugal uses mainly Fujitsu's A64FX processors from Japan.[146]
- **MareNostrum 5** in Barcelona will contain servers from Supermicro, storage from IBM and VAST, and the GPUs and software from Nvidia, all American firms, after an AI upgrade contracted in January 2026 to Fujitsu's Fsas Technologies and Telefónica.[147]
- **HammerHAI** in Stuttgart, Germany, is an Nvidia-based supercomputer supplied by Texas-based Hewlett Packard Enterprise.[148]
- **Daedalus** in Greece is also a system of Hewlett Packard Enterprise, assembled at the company's plant in Czechia.[149]
- **IT4LIA** in Bologna, Italy, is an Nvidia-based supercomputer manufactured by Dell, the American server and PC maker, and integrated by E4, an Italian firm.[150]
- **Alice Recoque**, France's exascale system, is built by Bull, the state-owned French supercomputer maker. Its main partition uses American AMD processors and GPUs, and a separate, smaller partition will use processors from the French start-up SiPearl.[151]

Partner country cloud providers also operate their own regions inside the EU, through which European hospitals, ministries and banks obtain AI services and computing capacity without building data centers of their own. The European cloud market grew from €61 billion in 2024 and was forecast to pass €75 billion in 2025, with most of that growth going to US providers. In 2025, Amazon, Microsoft, and Google together held about 70% of the market, compared with 15% for all European providers, down from 29% in 2017. The largest European providers, SAP and Deutsche Telekom, hold about 2% each, and the American firms invest some €10 billion every quarter in their European infrastructure.[152]

Newer cloud regions are built around AI capacity and national telecoms partners. Oracle opened its second Italian cloud region in Turin in November 2025, with TIM Enterprise, the business arm of the Italian telecoms group, as host partner. It also plans to invest more than €930 million in Spain over ten years, for a third Spanish region in Madrid hosted by the telecoms operator Telefónica, which will let customers keep their data in Spain under EU financial rules such as the Digital Operational Resilience Act.[153]

Chinese presence in the EU cloud remains small. In October 2023, 4iG, the Hungarian national ICT champion, signed a memorandum with Huawei in Beijing covering 5G, fixed networks, data centers, and cloud services.[154] In May 2024, a cloud cooperation memorandum followed, focused on building a cloud platform for Hungarian, Chinese, and other Asian businesses in Central Europe. Huawei and 4iG would also explore joint innovation centers for AI research, development, and application.[155]

Hungary has pursued deeper cooperation with Huawei, even as other member states excluded or restricted the company from their 5G networks. Huawei opened its European Supply Center at Páty, outside Budapest, in 2009 as its largest outside China, and supplies customers in more than fifty countries across Europe, Central Asia, and North Africa.[156] In June 2023, the Commission named Huawei and ZTE as high-risk suppliers, arguing that such suppliers are subject to highly intrusive third-country laws on national intelligence and data security, and warned that such dependencies could be used against European interests.[157] By then, ten member states had already required mobile network operators to restrict or exclude high-risk suppliers from their 5G networks and Germany followed in July 2024, requiring operators to remove critical Huawei and ZTE components from the 5G core by the end of 2026 and from access and transport networks by the end of 2029.[158] In May 2026, the Commission extended its warning to connectivity infrastructure at large, including fixed, fiber, submarine and satellite networks,[159] and the Cybersecurity Act revision proposed in January 2026 would let it list high-risk suppliers and order their removal, but no adopted EU-level assessment yet reaches the cloud and AI services.[160]

The future of the 4iG and Huawei platform now depends on Hungary's new government. Orbán lost the April 2026 election to Péter Magyar's Tisza party, and the new government may revisit Huawei's conditions in Hungary.[161] Magyar has said that his government will review Chinese investments without seeking to block them and will hold them to Hungarian and EU standards.[162]

Besides building data centers, foreign companies also buy the existing capacity in Europe. In March 2026, Meta contracted with the Amsterdam-based AI cloud provider Nebius for up to about €23.5 billion of AI infrastructure over five years.[163] In July 2026, Microsoft and the French developer Mistral expanded their strategic partnership, and Microsoft committed to use part of Mistral's expanding Europe-based GPU infrastructure for its own cloud and AI services.[164] In August 2025, Core42, the infrastructure arm of the Abu Dhabi group G42, gained access to up to 10,000 GPUs from Taiga Cloud, which the German company Northern Data, majority-owned since June 2026 by the US video platform Rumble, operates from data centers in Sweden, Norway, Portugal and the UK.[165]

European companies also host AI models developed outside the EU and build computing systems in partner countries. LightOn, a French LLM developer, hosts TelecomGPT, the telecoms model Khalifa University in Abu Dhabi built with the GSMA, the global mobile operators' association, and trained on the accompanying Open Telco Knowledge Graph.[166] Germany's Deutsche Telekom hosts the engineering models of the London firm PhysicsX on its Industrial AI Cloud.[167] Nebius built and operates Israel's national AI supercomputer, launched in January 2026,[168] and is developing a 300-megawatt data center in New Jersey.[169]

Europe depends on Chinese rare earth materials, US chip designers and Taiwanese manufacturers, but it also plays an indispensable role in the AI chip supply chain through the

fabrication equipment. The Dutch equipment maker ASML's photolithography machines give Europe control of a strategic chokepoint, since the most advanced semiconductors cannot be made efficiently without its extreme ultraviolet systems.[170] At the same time, the Netherlands faces pressure to align its export controls with those of the US, and it has required licenses for advanced deep ultraviolet systems since September 2023, widened the requirements in September 2024, and extended them to measuring and inspection equipment in April 2025.[171] In March 2026, South Korea's SK Hynix committed about €6.9 billion to ASML extreme ultraviolet machines, to be delivered by the end of 2027, which analysts estimated at about thirty units. They are aimed at its new Yongin plant and its M15X plant in Cheongju, which will produce high-bandwidth memory for AI chips.[172]

Asian manufacturers also build servers and high-performance computing systems in Central Europe, mostly in Czechia and Hungary:

- **Taiwan's Foxconn** has built liquid-cooled supercomputers for the American vendor Hewlett Packard Enterprise at Kutná Hora in Czechia since 2022.[173]
- **China's Lenovo** has had servers built in Hungary since 2016, first at a contract manufacturer's plant at Sárvár and since June 2022 at its own plant at Üllő near Budapest, which can produce more than a thousand servers a day.[174]
- **Taiwan's Inventec** opened a 52,000 square meter plant at Blučina near Brno in September 2025, where it is consolidating its Czech operations and building servers for AI and edge computing.[175]
- **France's Bull and Foxconn** agreed in June 2026 to build AI training and inference systems in Europe, with manufacturing and first testing at Foxconn's Pardubice site in Czechia and final assembly and validation at Bull's factory in Angers in France.[176]

American chipmakers are also expanding their own fabrication capacity inside the EU. Intel announced in July 2026 a €5 billion upgrade of its Leixlip fabs in Ireland to make Xeon server processors for AI data centers.[177]

Partner country institutes also work with European ones on chip design. The Advanced Chip Design Research Center opened in Brno in October 2024, run by Taiwan's National Applied Research Laboratories with the Czech Cyber Security Hub and three Czech universities.[178] Its program focuses on joint research projects, education and traning, with courses partly taught by Taiwanese staff and internships in Taiwan, covering AI, automotive semiconductors, materials, cybersecurity, and biomedicine chip design.[179] The Japanese autonomous-driving firm TIER IV joined the Automotive Chiplet Program at the Belgian research center imec in Leuven in March 2026, where it develops AI accelerators for self-driving systems.[180]

European chipmakers also expand fabrication outside the EU. The German chipmaker Infineon opened the first phase of its Kulim plant in Malaysia in August 2024, a €2 billion fab making the silicon carbide power chips used in electric vehicles and AI data centers.[181] AT&S, the Austrian substrate and circuit board maker, said in June 2026 it would spend €1.5 to €2 billion on AI chip substrate capacity at Kulim, backed by a long-term commitment from the American chip designer AMD and another non-yet-specified technology company.[182]

European firms significantly contribute to building of the physical infrastructure behind AI. Italy's Prysmian, France's Nexans and Denmark's NKT hold about 65% of the global submarine cable market, while Germany's Siemens, the Swiss-Swedish group ABB and France's Schneider Electric sell the turbines, transformers and switchgear for the power networks of gigawatt-scale data centers.[183] Schneider Electric, the French energy management and automation group, agreed in March 2025 to collaborate with South Korea's SK Telecom on the mechanical, electrical, and

plumbing systems for hyperscale AI data centers.[184] The German company Siemens Energy and its Indian arm signed two memoranda with Tata Consultancy Services in April 2026 to support HyperVault, the Indian group's new AI data center business, with power generation, electrification and grid technology.[185] The Finnish network equipment maker Nokia won the contract in August 2024 to build Telekom Malaysia's optical backbone for data center traffic, which stretches from the Thai border to the Singaporean one.[186]

Research, talent and knowledge exchange

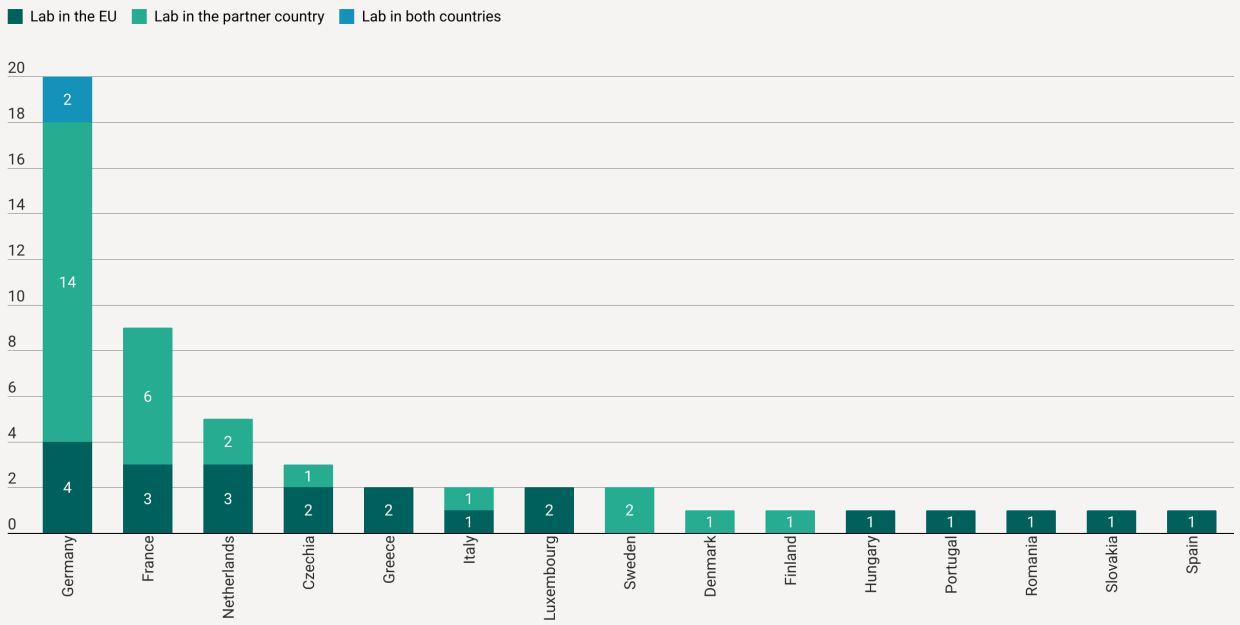
European universities and public research institutes are attractive partners for foreign companies and governments working on AI, offering established expertise, publicly funded research infrastructure, and access to public datasets and specialized facilities. For example, France's National Institute for Research in Digital Science and Technology (Inria) and Germany's Max Planck and Fraunhofer societies conduct AI research with partners outside the EU. At the same time, Europe depends on partnerships with foreign companies to access the frontier of the field, which has largely moved into company laboratories. Industry produced more than 90% of notable AI models in 2025, and the leading developers no longer publish their training code, parameter counts or dataset sizes.[187] Academic teams account for most AI publications and the most unconventional work, while industry teams are more likely to build state-of-the-art models, and jointly written papers are the most cited.[188] Countries whose researchers collaborate internationally also tend to have greater scientific influence.[189]

Foreign companies also open research hubs inside the EU to work with local research groups. Silo AI, the Finnish laboratory AMD acquired in 2024, opened a research hub in 2026 with computer vision groups at the universities of Bologna, Modena, and Reggio Emilia, working on spatial AI and models for robotics and autonomous driving.[190] Japan's Fujitsu worked with France's Inria from 2018 on AI and machine learning for data from connected devices, as part of a €50 million Fujitsu investment in France.[191]

Foreign companies also set up joint laboratories with European universities, sharing staff and facilities over long periods. The research arm of the American software group Microsoft has operated a joint center with Inria in Paris since 2005. In 2018, the center employed more than 75 researchers and doctoral students, working on machine learning at cloud scale, computer vision and security, with more than 60% of the center's work related to AI.[192] The Japanese carmaker Toyota has funded an autonomous driving laboratory at the Czech Technical University since 2018 at €1 million a year.[193] The Taiwanese chipmaker Taiwan Semiconductor Manufacturing Company (TSMC) is the technology partner of the Munich Advanced-Technology Center for High-Tech AI Chips (MACHT-AI) center for AI chip design at the Technical University of Munich, which the Bavarian government funds with €4.47 million.[194] Germany and France account for over half of the joint research laboratories with foreign partners recorded in our dataset.

European companies and research institutes set up similar laboratories abroad, most often at Asian universities. The German engineering group Bosch established AI research centers at the Indian Institute of Technology Madras and at Tsinghua University in Beijing, where it has committed about €12 million since 2020.[195] The German medical technology group Siemens Healthineers operates a joint AI laboratory with the Indian Institute of Science in Bengaluru, and works with King's College London and the Mayo Clinic in the US on AI-equipped imaging research centers.[196] The French National Center for Scientific Research and Japan's National Institute of Advanced Industrial Science and Technology (AIST) operate a joint laboratory on humanoid robotics and AI at Tsukuba.[197] European companies and institutes set up more joint AI laboratories with Indian partners than with those of any other country.

EU's joint AI labs with partner countries



Note: The chart counts joint AI labs, meaning permanent labs or research centers that an EU institution or company set up together with a partner from one of the analyzed countries. "Lab in both countries" means one lab with sites on both sides, for example in Munich and Montreal.

Data: Authors' own compilation.

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Foreign technology companies also finance centers and multi-year programs inside European universities. In 2019, the American chipmaker Nvidia set up a joint AI laboratory with the University of Luxembourg's interdisciplinary center SnT, its Luxembourg Centre for Systems Biomedicine (LCSB), and the Luxembourg Institute of Science and Technology. The partners worked on joint projects, from drone inspections of bridges to genome analysis, and gained better access to Nvidia hardware and software.[198] Google opened a center of excellence at the same SnT in February 2025, with about €480,000 for cybersecurity and AI training,[199] and it finances seven AI and cybersecurity projects at the Technical University of Munich.[200] The German chemicals group Merck and the American chipmaker Intel jointly fund a three-year academic program on AI for greener chipmaking. Since November 2024, it has supported six projects for sustainable semiconductor processes at institutions in Germany, Greece, Sweden and the Netherlands.[201]

Government programs also fund joint research between European and partner-country institutions, primarily through association with Horizon Europe. Of the twelve partner countries, the UK and Israel are associated with the whole program, and Canada, South Korea and Japan with Pillar II, which funds collaborative research projects.[202] In July 2026, the EU and India also agreed to open negotiations on Indian association, aiming to conclude them by the end of the year.[203] The association would let institutions bid for EU research funding in consortia with EU-based researchers, and British and Israeli universities already take part in a Horizon consortium on generative AI safety. Institutions in countries without association can still join these projects, but they are not eligible for EU funds and must secure their own financing.

National research agencies also open joint calls with their counterparts. South Korea's National Research Foundation held a call with the French National Research Agency in 2025 on biotechnology using AI, and opened another with the Swedish Research Council in March 2026 on AI in the life sciences.[204] India's Department of Science and Technology and Business Finland opened a joint innovation call in April 2026 that lists AI among its digital priorities, alongside sustainable energy and microelectronics.[205]

Health and life sciences have emerged as the largest area of AI research cooperation between Europe and its partners, especially in drug discovery. The French group Sanofi contracted the British company Exscientia in 2022 to design candidate molecules with AI.[206] The German group Merck KGaA cooperates with London-based drug discovery firm BenevolentAI from 2023 and the Israeli antibody designer Biolojic from 2024.[207] The French diagnostics company bioMérieux studies antibiotic resistance with Mila, the Quebec AI institute in Montreal.[208]

Medical imaging is another frequent area of cooperation, particularly in cancer. The Dutch health technology company Philips develops CT imaging together with Chinese clinicians at its research center in Shenyang. In Sichuan and Gansu, it works with provincial health authorities and academic hospitals on tele-ultrasound that connects village doctors with remote specialists to detect congenital heart conditions and pregnancy risks early, which the company describes as using AI to speed up clinical decisions.[209] The American medical imaging company GE HealthCare signed a memorandum with Semmelweis University in Budapest in April 2026 to create an oncology center of excellence.[210] Google is researching how AI can predict the progression and relapse of women's cancers with the Institute of Women's Cancers, founded by the Paris cancer center Institut Curie, Paris Sciences et Lettres University (PSL), and the French health research institute Inserm.[211]

Research cooperation also focuses on telecommunications and the automotive industry, where European firms mostly work with partners in South Korea, Japan, and China. South Korea's SK Telecom joined Finland's Nokia and Japan's Nippon Telegraph and Telephone (NTT) and its subsidiary DOCOMO in 2024 to develop an AI native air interface for 6G, in which AI models trained on real and simulated network data manage the radio link between phones and the network to raise performance and cut energy use.[212] Sweden's Ericsson signed a memorandum with SK Telecom in March 2026 on AI-powered radio access networks.[213] In the automotive industry, German carmakers increasingly develop AI driving systems in China. From 2027, Volkswagen will extend the electronic architecture it builds with the Chinese carmaker XPENG to its combustion and hybrid models in China, giving them central computers for AI-driven driving assistance and an AI-powered in-car assistant.[214] Audi is setting up a technology center in Shanghai with the Chinese state carmaker SAIC to engineer AI driving assistance for the models it sells in China.[215]

The French group Thales is the most active European player in defense AI research. It established the cortAIx laboratory in Montreal in 2017,[216] set up a hybrid AI research chair at Sorbonne University Abu Dhabi in 2020[217] and launched its first Asian AI center in Singapore in 2025.[218] Singapore's Defense Science and Technology Agency (DSTA), expanded its research with the French developer Mistral in June 2026 into agentic systems and drone navigation.[219] Inria, the French shipbuilder Naval Group and the Indian Institute of Technology Delhi work on machine learning to detect and locate underwater targets for the Indian Navy.[220]

Much of the AI safety research recorded in our dataset is carried out through Horizon Europe consortia, with British and Israeli institutions as the most frequent partners. The AutoFair project worked on fair and transparent AI, coordinated from the Czech Technical University with Imperial College London and Technion in Haifa.[221] The RobustifAI project, coordinated from the University of Liverpool, brings eighteen partners from eleven countries to work on trustworthy generative AI.[222] The European Lighthouse on Secure and Safe AI network, coordinated by the CISPA Helmholtz Center in Saarbrücken, links 26 institutions on robustness, privacy-preserving training, and human oversight, and the UK's Alan Turing Institute leads work on third-party certification.[223]

Outside the Horizon programs, individual governments fund safety research at each other's universities, such as the UK's AI Security Institute at Trinity College Dublin, which studies the risks of AI companions.[224] Israel's Ministry of Innovation, Science and Technology and the Slovak

Research and Development Agency opened a joint call in June 2026 that names AI safety as one of three priority areas.[225]

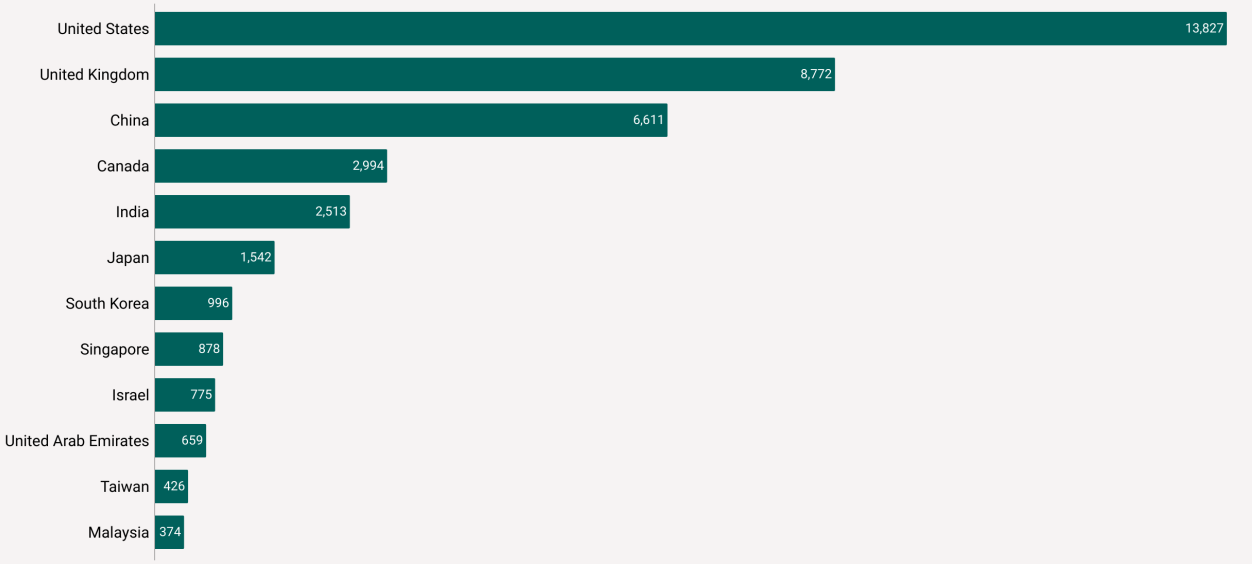
European applied research institutes and companies also operate programs abroad. Germany's Fraunhofer IST opened the first Fraunhofer innovation platform in Taiwan with Feng Chia University in October 2024, where the two sides build AI into the production of high-precision optical coatings.[226] The German Research Center for Artificial Intelligence co-develops smart factory tools with the Indian IT services group Tech Mahindra,[227] and works with the University of Nottingham on an eleven-partner Horizon Europe project on robots that install thermal insulation and inspect buildings.[228] As for the companies, the French defense group Thales opened a research and technology center for embedded software and AI in Bengaluru in February 2026, one of five such laboratories it operates worldwide.[229] The German engineering group Siemens opened its first industrial AI laboratory outside Germany in Beijing in 2019,[230] and is building an AI research center for battery manufacturing in Ontario.[231] The Dutch trading firm Optiver funds an AI laboratory at the Indian Institute of Technology Bombay,[232] and Sweden's Ericsson is the industry partner in a program led by Montreal's École de technologie supérieure on using AI to cut the energy use of 5G networks.[233]

Foreign companies' AI centers cluster in Western Europe, most of them in France and Germany. For example, three AI labs were established in Paris: Google DeepMind's first continental European laboratory, which opened in 2018;[234] the Tech Center Europe that Japan's Rakuten started in April 2025;[235] and a laboratory of the Emirati university MBZUAI.[236] Most of the fourteen in Central and Eastern Europe develop products, although several also conduct research. In Romania, Adobe's largest European development center has grown to 1,200 staff and works on its Firefly and GenStudio AI products.[237] In Poland, Samsung's research institute in Warsaw trained the European-language translation models inside Galaxy AI.[238]

Most mass skilling commitments, in which a company pledges free AI training for a set number of people, come from American companies, led by Microsoft, Google, OpenAI and Amazon Web

EU's joint AI publications with partner countries

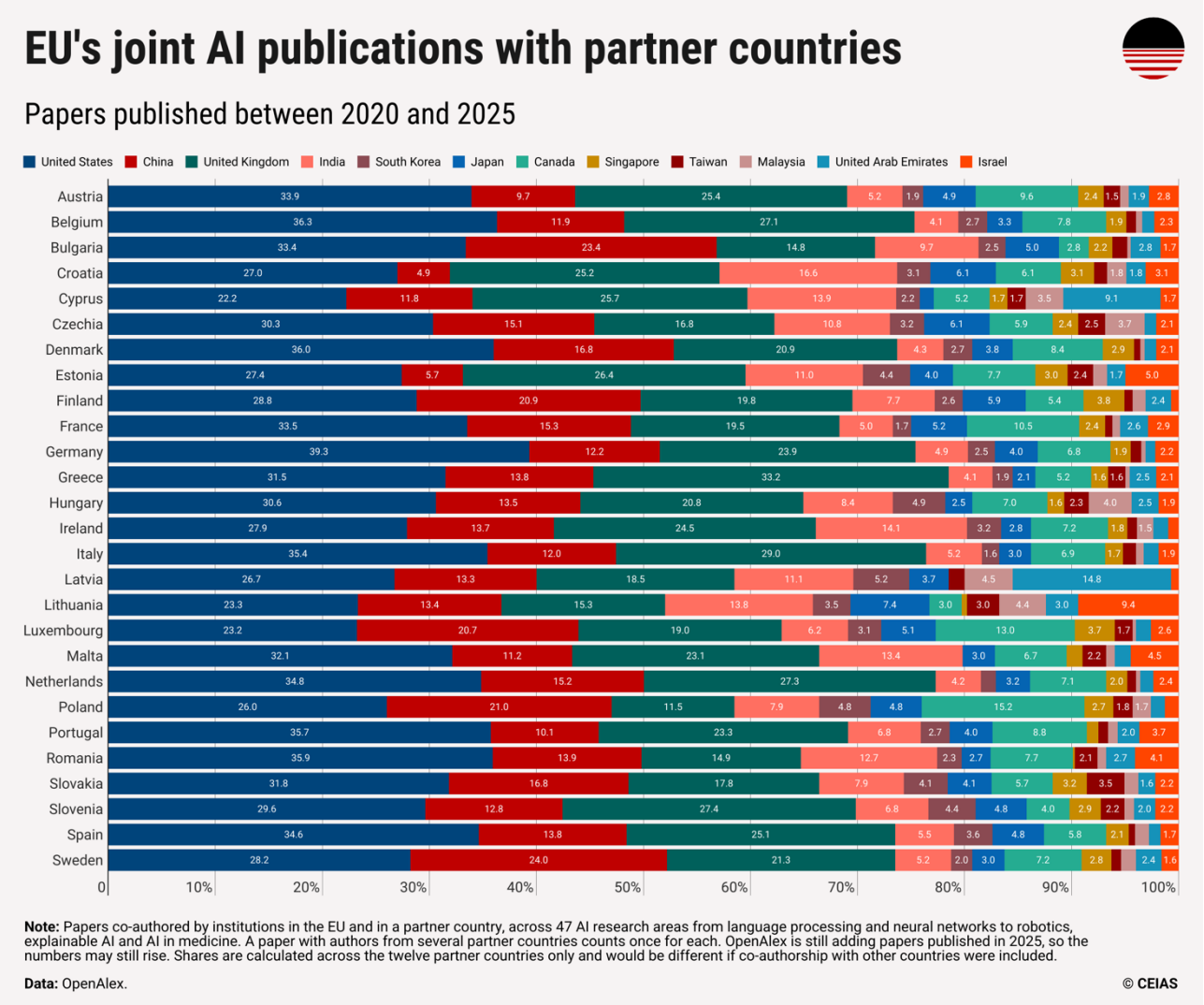
Papers published between 2020 and 2025



Note: Co-authored papers between EU and partner-country institutions across 47 AI research areas, from language processing and neural networks to robotics, explainable AI and AI in medicine. Papers with several partner countries count once for each.

Data: OpenAlex.

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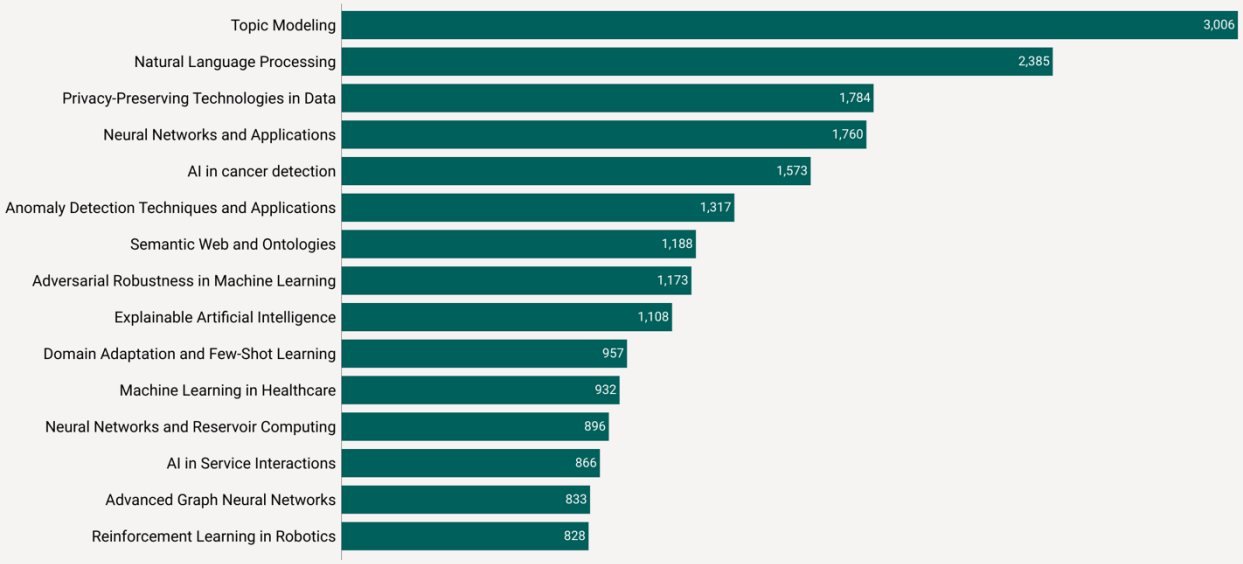


Services. American developers also build their tools into European university teaching. IU International University of Applied Sciences, Germany's largest university by enrollment with more than 130,000 students, built Microsoft's Copilot into more than 250 degree programs.[239] OpenAI's first Education for Countries cohort, announced in January 2026, includes Estonia, Greece, Slovakia, and the Italian rectors' conference, which will bring ChatGPT Edu to Italian universities.[240] The largest non-American skilling program is Huawei's Seeds for the Future, whose 2024 European edition in Rome drew 145 students from 23 European countries.[241] Huawei also runs ICT academies with European universities, part of a program that, by the end of 2025, has partnered with more than 3,500 colleges and universities in over 110 countries and trained more than 1.8 million students.[242]

European companies and universities also train workforces and students in Asia through corporate skilling programs, hackathons and joint degrees. Sweden's Ericsson and Malaysia's state 5G company DNB set out in September 2025 to train 40,000 municipal and government employees in 5G, AI and the Internet of Things (IoT).[243] The French defense group Thales drew about 10,900 registrations to its GenTech India Hackathon in 2025, for AI in cybersecurity, education and aerospace.[244] École Polytechnique and Paris Sciences et Lettres teach an integrated bachelor's and master's program in AI with Shanghai Jiao Tong University,[245] and Austria's three technical universities opened more than 300 two-year master's places to Indian graduates in fields including AI, robotics and computer science.[246]

Main topics of joint AI publications

Papers published between 2020 and 2025



Note: Co-authored papers between EU and partner-country institutions across 47 AI research areas, from language processing and neural networks to robotics, explainable AI and AI in medicine. Each paper is counted once, under the main topic OpenAlex assigns to it, even when it has authors from several partner countries.

Data: OpenAlex. © CEIAS

Between 2020 and 2025, researchers in EU member states co-authored some 13,800 AI papers with American partners and 8,800 with British ones, far ahead of China's 6,600.[247] Joint output with the UAE more than quintupled over the period (from 40 papers in 2020 to 214 in 2025) and with Malaysia more than tripled (from 29 to 99), while work with Israel slightly declined (from 148 to 122), the only shrinking relationship among the twelve partners. Germany co-publishes most with nine of the twelve, France leads with Canada and the Emirates, and Czechia was the leading EU co-author with Malaysia in 2025.

The EU has, however, begun setting conditions on research cooperation with partner countries, starting with a May 2024 Council recommendation. The recommendation calls on universities and research organizations to assess risks, conduct due diligence on prospective partners and report cases of concern, although it is neither binding nor country-specific.[248] The Horizon Europe work program for 2026 and 2027 bars entities established in China from all Innovation Actions and most Research and Innovation Actions. The Commission also excludes entities controlled from China from Innovation Actions in ten critical technology areas, including AI, semiconductors, and quantum, and excludes universities supervised by China's Ministry of Industry and Information Technology from every call.[249] In October 2025, the Commission promised to write research security into law through a European Research Area Act and to set up a European Center of Expertise on Research Security, neither of which was in place at the time of writing.[250]

Member states were left to implement it, and in early 2026 many were still developing a national approach, with some at a stage of limited awareness and ad hoc responses.[251] Germany agreed in December 2025 on a national research security platform to open in autumn 2026.[252] In June 2026, the Dutch government concluded that its planned screening of all researchers entering sensitive fields such as AI was neither effective nor feasible, and is now preparing a narrower version.[253] By August 2026, the Technical University of Munich no longer allowed institutional projects with the Seven Sons of National Defense, seven Chinese universities closely tied to China's defense industry, and had cut its Chinese partnerships to a few leading universities such as Tsinghua.[254] In June 2026, the federal government and Saarland, which own the CISPA

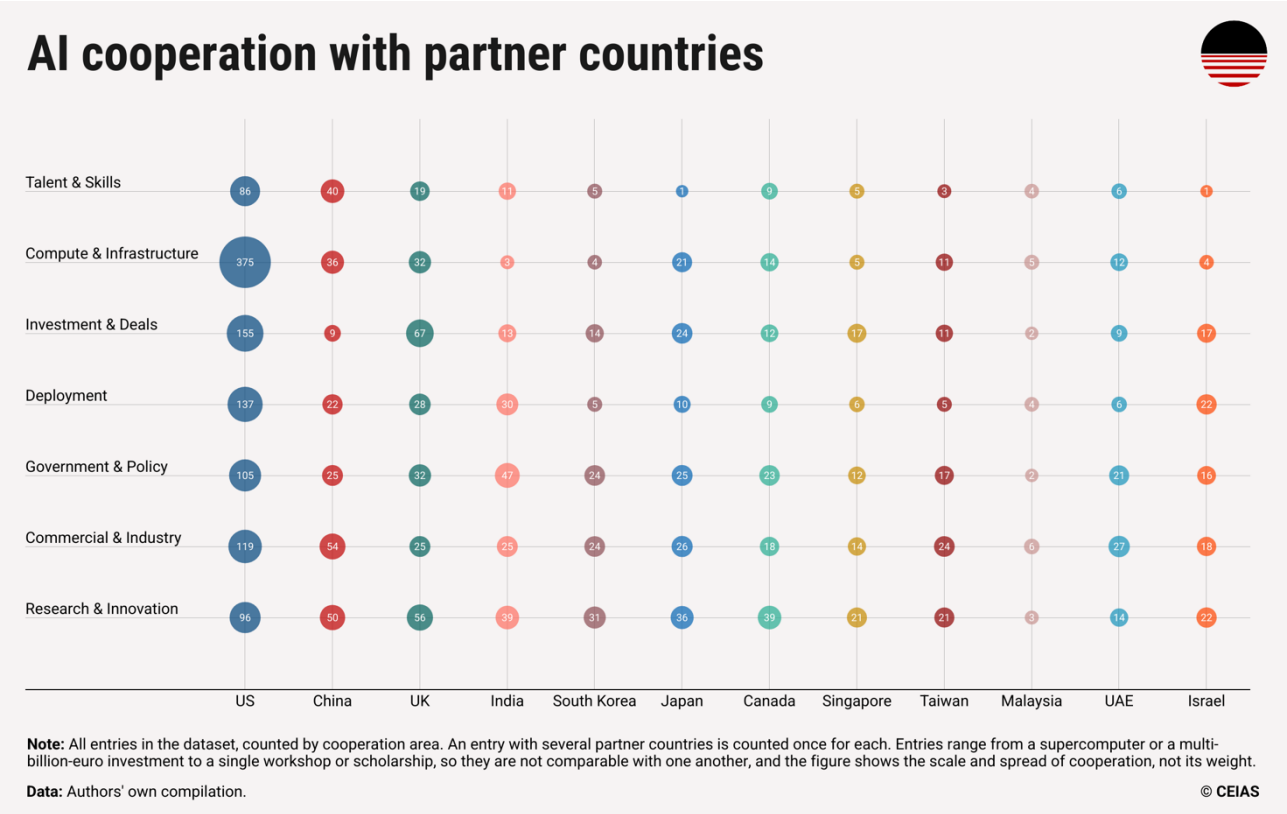
Helmholtz Center for Information Security in Saarbrücken, paused all projects with Chinese partners pending a special audit.[255]

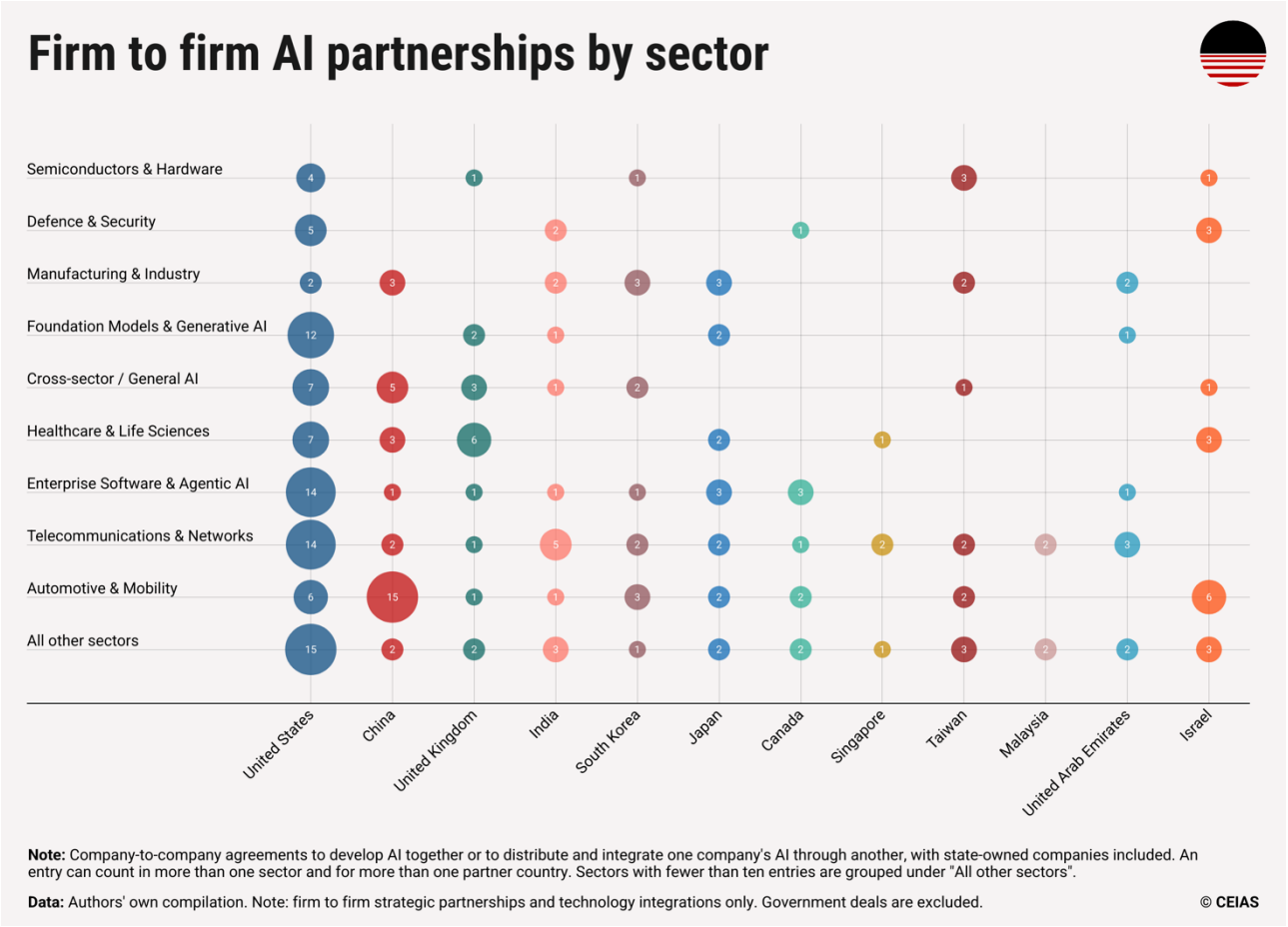
Commercial partnerships, investment, and deployment

European spending on AI is growing by about a third each year and is forecast to reach about €250 billion in 2029, with banking accounting for 12.5% of the total in 2026, the largest share of any industry.[256] Typically, contracts give customers access to the service for a fixed period, while suppliers retain ownership and control of the underlying models and platforms. Customers may then find it difficult to switch providers, and the EU's Data Act, applicable since September 2025, addresses this by requiring providers to facilitate switching between services.[257]

For European AI suppliers, the separate challenge is financing growth, which often means relying on foreign investors. Across the wider European startup sector, 40 of the 147 companies that became unicorns between 2008 and 2021 moved their headquarters abroad, most of them to the US.[258] The revised EU regulation on foreign investment screening, adopted in June 2026, requires every member state, from January 2028, to approve foreign investments in advance in firms developing general-purpose AI models for defense and space or models with systemic risks, including investments made through EU subsidiaries of non-EU groups.[259]

Health and life sciences is the largest area of commercial cooperation, with the US, the UK and Israel as the main partners. Automotive and mobility follow, with China leading, ahead of the US. Other sectors are more specialized: semiconductors are concentrated in Taiwan, manufacturing and industry in Japan, and telecommunications and enterprise software in India. Much of the cooperation is not sector specific.



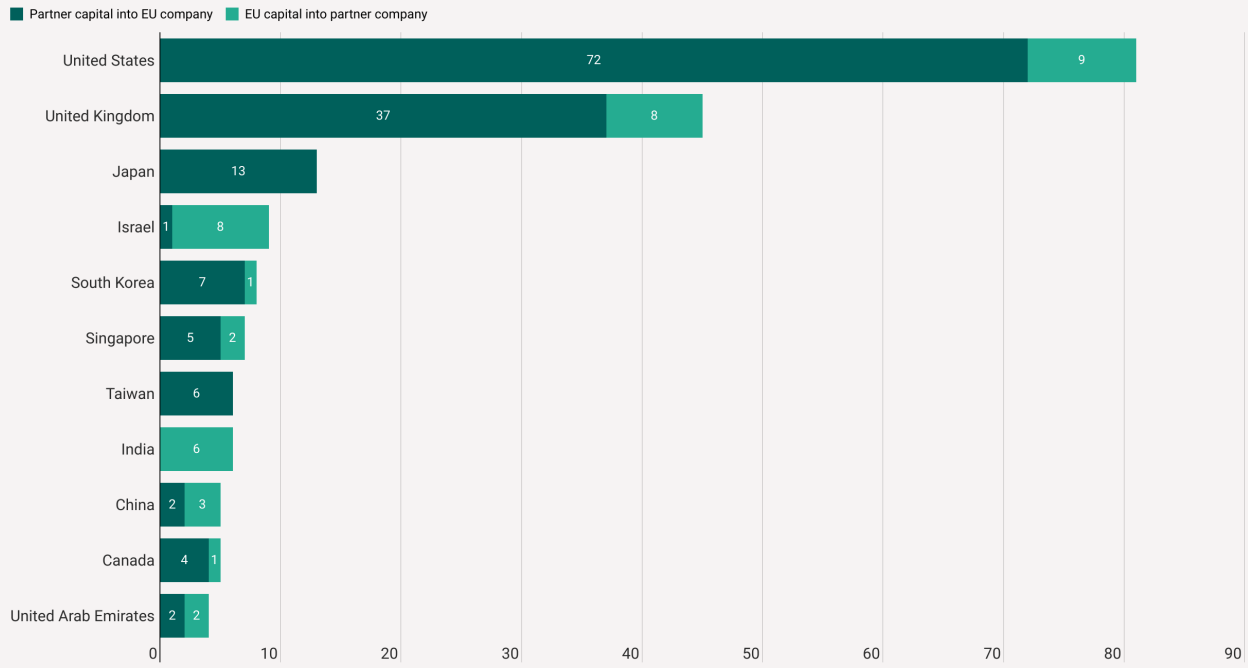


European consultancies and telecoms companies resell American platforms to customers, adding integration, local support, and compliance responsibility. For example, Telefónica Tech, the business services arm of the Spanish telecoms group, offers the AI search engine of the American startup Perplexity to business customers in Spain.[260] In June 2026, Deloitte Malta announced a partnership with US-based Databricks under which its consultants will use the company's platform to build systems that help clients bring data from different sources together, manage who can access it, and use it for analytics and AI. www.deloitte.com[261] Meanwhile, foreign platforms and integrators offer European models to their customers. The American cloud provider Amazon Web Services offers the French developer Mistral's models on its Bedrock platform,[262] and the Indian IT services firm Tata Consultancy Services became the first global integrator for Mistral Forge, Mistral's system for building enterprise models, in May 2026.[263]

Foreign firms concentrate their European offices in a few member states, above all France, Germany and Ireland, and American and Chinese companies open them most often. The American AI developer Anthropic announced offices in Paris and Munich in November 2025.[264] The Chinese driving AI firms Horizon Robotics and Momenta placed their European headquarters in Munich and near Stuttgart.[265]

German carmakers develop the AI in their Chinese vehicles with Chinese partners, in joint ventures registered in China. Volkswagen's venture with Horizon Robotics, CARIZON, builds automated-driving software for Volkswagen models sold in China. It delivered highway assistance and memory parking at the end of 2025, is rolling out urban driving assistance across seven electric models during 2026, and targets level three automation, in which the car drives itself in defined conditions and the driver takes over when asked, in the second half of 2027.[266] China's Horizon Robotics and Germany's Aumovio, the automotive supplier spun off from Continental, jointly develop driver-assistance systems through their venture neueHCT. The

AI start-up funding flows between the EU and partner countries



Data: Authors' own compilation.

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systems use Horizon's chips to power features such as automated highway driving under driver supervision and assisted parking.[267] In September 2026, neueHCT and its software partner QNX announced that an unnamed German carmaker had selected neueHCT's front-camera driver-assistance system for a passenger vehicle platform launching in China. Production is scheduled to begin in 2027, with vehicles equipped with the system also slated for sale in Australia, New Zealand, Japan and South Korea.[268] CARThunder, a joint venture between Volkswagen's software unit CARIAD and the Chinese software company ThunderSoft, develops software for in-car displays, infotainment and cloud connectivity. ThunderSoft holds a 51% stake in the venture, which supplies Volkswagen's Chinese joint ventures and contributes software to global vehicle platforms used by Audi and Porsche.[269]

American investors contributed about €13 billion of the capital raised by European AI startups from abroad, ahead of the UK at €1.9 billion, Canada at €1.6 billion, and Japan at €0.8 billion. Canada's pension fund, CPP Investments, was one of 13 investors in the Series E round of about €1.6 billion that the German defense AI company Helsing raised in July 2026.[270] Chinese investment is negligible: a single round worth €18 million, even though Chinese investment in the EU and the UK reached €16.8 billion in 2025, its highest level since 2018, led by the electric vehicle supply chain.[271] European investors also fund startups in partner countries, mainly in the UK, as well as in Israel, the US, and India.

In our dataset, banks and hospitals appear as active AI deployers. In August 2025, Santander, a Spanish bank, partnered with American AI developer OpenAI as part of its aim to become an AI-native bank and expected 30,000 employees in Europe and the Americas to use ChatGPT Enterprise by the end of 2026.[272] BBVA, another Spanish bank, agreed with Google Cloud in July 2025 to provide Google's Gemini assistant to its more than 100,000 employees once they complete an internal AI course.[273] In contrast, the British bank HSBC signed a multi-year deal with

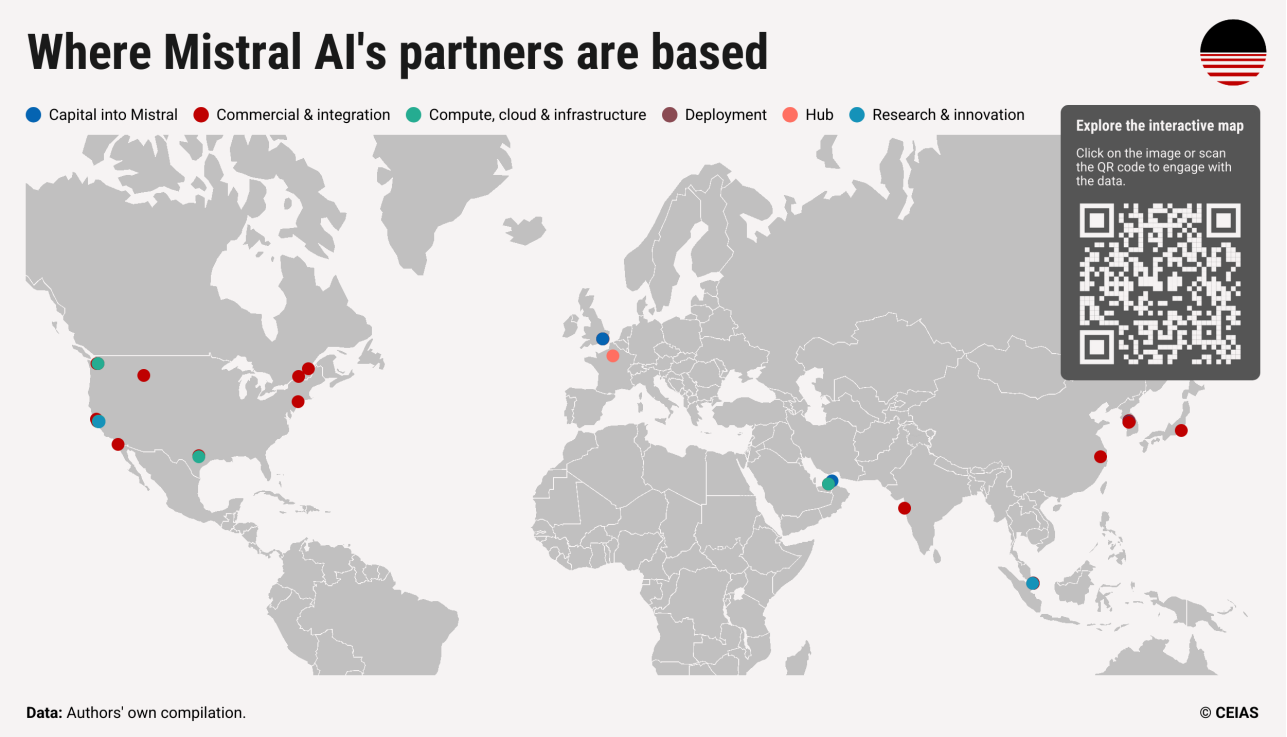
the French developer Mistral in December 2025 to use its models within the bank's systems.[274] In healthcare, the German hospital group Asklepios finished installing AI software from Israel's Aidoc across 28 of its clinics in 2025. The system now checks more than 35,000 computed tomography (CT) scan and X-ray images a month for brain hemorrhages, pulmonary embolisms and fractures.[275]

In our dataset, no European bank or public administration has integrated a Chinese model into their operations. The Chinese firms Pony.ai and WeRide supply the driving systems for Europe's first commercial robotaxi service, open to the public in Zagreb since April 2026,[276] for fully driverless minibusses near Valence in France,[277] and for robotaxi and "robobus" trials in Bratislava.[278] The Dutch lighting company Signify has built Alibaba's Qwen model into its connected street lighting system to manage the lighting and reduce energy consumption.[279] In 2021, the Hungarian town of Siófok commissioned China's Dahua to fit 39 AI cameras with face recognition along its Lake Balaton promenade.[280]

Indian IT services companies such as Tata Consultancy Services, Infosys, HCLTech and Wipro operate the IT for some European companies on five- to ten-year contracts that increasingly involve AI. For example, Tata Consultancy Services signed a seven-year transformation contract worth €550 million with the Scandinavian insurer Tryg in September 2025.[281] HCLTech renewed its decade-old contract with Sweden's Volvo Group in 2025 and now uses its generative AI platform, AI Force, to automate Volvo's IT operations.[282] In April 2025, Wipro took over the German appliance maker Vorwerk's business applications, infrastructure, and cybersecurity for five years, consolidating them into a single AI-powered monitoring platform.[283] In November 2025, the German software group SAP hired Tata Consultancy Services for a five-year overhaul of its internal systems.[284] Infosys and HCLTech have set up innovation labs for SAP solutions and Business AI in Düsseldorf and Munich.[285]

European media companies also license their content to American AI firms that need more data for training. The American AI developer OpenAI agreed in December 2023 to pay the German publisher Axel Springer, which owns Bild, Die Welt and Politico, tens of millions of euros a year,[286] and signed a similar agreement with the French daily Le Monde in March 2024.[287] Italy's GEDI, the publisher of la Repubblica and La Stampa, followed in September 2024, but no content had been provided, after the Italian data protection authority warned that sharing the personal data in its archives with OpenAI would likely breach EU data protection law.[288] In Denmark, the collective rights body DPCMO, which represents 99% of the country's news industry, sought a multi-year licensing deal with OpenAI, but OpenAI declined and, in 2025, refused to take part in mediation set up by the Danish culture minister. DPCMO took OpenAI to court in February 2026, claiming it trained its models on Danish press content at least until summer 2024 and reproduces that content in ChatGPT's answers. In December 2025, DPCMO signed its first collective generative AI license with the Los Angeles firm ProRata, whose answer engine, Gist Answers, publishers can embed on their websites in return for a share of the revenue.[289]

American firms supply much of the AI used by European armed forces, police and intelligence services, and by NATO. Palantir supplies NATO's Maven system, which combines intelligence from sensors, satellites and units in the field to help designate targets and speed up decisions.[290] It also supplies VeRA, the platform the Bavarian police have used since 2024 to search their databases and show the connections between people and events.[291] France's domestic intelligence service, the DGSI, has used Palantir software in counter-terrorism since 2016 and renewed the contract for three years in December 2025, until a French alternative is available. In June 2026, Prime Minister Sébastien Lecornu announced that the DGSI would switch to ArgonOS, built by the French firm ChapsVision, although the service is expected to keep using Palantir's software until at least 2028.[292] In 2023, Spain awarded Palantir a €16.5 million intelligence contract for its armed forces.[293] Anduril, a Californian maker of autonomous weapons systems, also sells counter-drone AI to the Dutch military and has agreed with Germany's Rheinmetall to



develop and manufacture drones for European customers.[294] Shield AI, a US company whose software lets its drones operate without GPS or a pilot, supplied its V-BAT drones to the Dutch navy and marine corps in July 2025, and the Romanian navy also plans to acquire them.[295]

European governments have, however, begun hedging against that dependence. By May 2026, the Bundeswehr had ruled Palantir out of its military cloud, the pCloudBw, because its data requirements do not allow the suppliers to access national data, and was evaluating offers from three European suppliers, Almato, Orcrist and ChapsVision, with a decision due by the end of 2026.[296] The Dutch state secretary for defense said in June 2026 that a fully-fledged alternative to Palantir must be available within two years, but terminating the contract immediately would create security risks.[297] Denmark approved an AI center for its armed forces in May 2026 to build Danish equivalents of Maven and Palantir's data platform Foundry with seven Danish firms.[298] In July 2026, France and Germany pledged to build a European rival to Palantir's military AI around France's Arcadia command-and-control platform.[299]

Greece signed a memorandum with the New York-based voice AI firm ElevenLabs in May 2026 to explore voice AI for government call centers, gov.gr and the Visitgreece tourism portal.[300] Since May 2026, Malta offers every resident aged 14 or over a year of ChatGPT Plus or Microsoft Copilot free if they complete a two-hour national AI literacy course.[301]

Conversely, EU companies provide military and administrative AI applications to governments outside the EU. Estonia's Milrem Robotics, majority-owned since February 2023 by the Emirati state defense group EDGE, agreed in January 2024 to supply the UAE Ministry of Defense with twenty robotic combat vehicles and forty unmanned ground vehicles, equipped with autonomy software capable of planning vehicles' routes in complex environments.[302] In March 2025, Singapore's defense ministry and its two defense technology agencies, DSTA and DSO National Laboratories, agreed with the French developer Mistral to adapt its language models for tasks such as mission planning and to host them on their own servers.[303] The French defense group Thales supplies the Republic of Singapore Navy with an autonomous mine countermeasures system and is developing AI with Dubai Air Navigation Services to cut the time aircraft spend holding over Dubai.[304] Spain's Indra won more than a €55 million contract in 2023 to centralize air traffic surveillance and control at five Indian airports, including Mumbai and Bangalore.[305]

Denmark's cBrain supplies a UAE government agency with F2, the software trained to support environmental regulation and permitting use.[306]

Government agreements and governance

Government agreements set the frameworks in which companies and researchers cooperate, signal priorities, and build institutional channels for concrete AI projects. Furthermore, governmental relations are crucial in developing AI governance and ethics standards and ensuring interoperability of safe AI systems. In the EU context, this is especially important because the AI Act's requirements must be reflected by partners accessing the European market.

AI cooperation at EU level is concentrated in the Digital Partnerships and the Trade and Technology Councils. The Digital Partnerships with Japan, South Korea,[307] Singapore and Canada all name artificial intelligence among their priorities, and the Singapore council of December 2025 committed both sides to implementing the administrative arrangement on the safety of AI signed in November 2024, under which the EU AI Office and Singapore's AI Safety Institute agreed to test and evaluate general-purpose AI models jointly and to develop shared tools and benchmarks.[308] At the fourth council with Japan in Brussels in May 2026, the two sides agreed to further regulatory, research, and industrial cooperation on data, AI, quantum, and semiconductors.[309] In June 2025, Canada and the EU agreed to link Canadian high-performance computing with the EU's AI Factories and maintain a secure transatlantic supply chain for artificial intelligence, supercomputers, and semiconductors.[310]

The Trade and Technology Councils with the US and India cover artificial intelligence alongside trade, technology standards and supply chains. At the third council with India in July 2026, the two sides committed to step up cooperation on semiconductors, high-performance computing, quantum technologies, AI and 6G.[311] However, the council with the US has not met since April 2024[312] and the Commission describes it as inactive.[313] In April 2026, EU Trade Commissioner Maroš Šefčovič said Brussels and Washington were discussing a new digital dialogue.[314] In January 2023, the Commission and the State Department agreed to cooperate on artificial intelligence for the public good, and in July 2024, the European, American, and British competition authorities issued a joint statement on competition in generative AI foundation models.[315] With the UAE, the EU opened negotiations on a Strategic Partnership Agreement in December 2025, naming digitalization and artificial intelligence, connectivity, and research among the priorities to cover.[316]

Among the EU member states, France, Germany and Poland lead the most active bilateral AI diplomacy. On the receiving end, India has been the most courted partner, ahead of the UAE and Canada. The German-Indian AI Pact of February 2026 focuses on application projects in mobility, energy, healthcare, and smart production, to be implemented through the existing bilateral digital dialogue, with the first pilot projects to be identified during 2026 and 2027.[317] The France and UAE framework of February 2025 carries a 1 gigawatt AI data center alongside chips, talent and virtual data embassies,[318] and Italy's memorandum with the UAE of the same month plans up to 2 gigawatts of data center capacity.[319] About a third of these instruments commit to working groups, task forces and exchanges of experience, and should not be automatically interpreted as indicators of future success in B2B cooperation.

Smaller member states also raise AI in ministerial visits, foreign office consultations, and on the margins of multilateral summits, most often as one subject among many. Slovenia and India covered AI in the tenth round of their foreign office consultations in New Delhi in May 2025, alongside trade, space exploration, migration and defense.[320] In February 2026, Croatia's Prime Minister Andrej Plenković and Slovakia's President Peter Pellegrini both attended the India AI Impact Summit.[321] In July 2026, Romania sent its state secretary for foreign affairs to Seoul to

Government-to-government AI agreements

	United States	China	United Kingdom	India	South Korea	Japan	Canada	Singapore	Taiwan	Malaysia	United Arab Emirates	Israel
EU level	✓			✓		✓	✓					
Austria				✓				✓			✓	
Belgium												
Bulgaria												
Croatia												
Cyprus				✓							✓	
Czechia				✓	✓							
Denmark												
Estonia						✓	✓					
Finland				✓			✓					
France		✓	✓	✓	✓	✓	✓	✓	✓		✓	
Germany			✓	✓			✓	✓	✓			✓
Greece	✓										✓	
Hungary		✓									✓	
Ireland							✓					
Italy				✓	✓						✓	
Latvia												
Lithuania												
Luxembourg												
Malta												
Netherlands				✓								
Poland	✓			✓		✓	✓		✓		✓	
Portugal				✓								
Romania											✓	✓
Slovakia		✓		✓								
Slovenia											✓	
Spain							✓					
Sweden	✓			✓			✓					

Note: Agreements signed by an EU member state or the EU with the government of a partner country in which they commit to cooperate on AI, such as AI declarations, memoranda of understanding, partnerships and science or digital agreements that name AI as a field of cooperation. Negotiations, joint statements that only mention AI, broad research program associations and investment pledges are not included.

Data: Authors' own compilation.

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propose AI as the next pillar of the strategic partnership with South Korea, covering cybersecurity, energy infrastructure, and public services.[322]

AI relations with the US are conducted mostly at the EU level and less at the member states level. Washington and Brussels negotiated regulatory issues through the Trade and Technology Council, which in 2024 produced a joint roadmap on evaluation and measurement tools for trustworthy AI and a shared terminology and taxonomy.[323] The European AI Office and the US AI Safety Institute opened a technical dialogue in July 2024 on watermarking of synthetic content, government compute infrastructure and AI for weather modeling.[324] Below the EU level, Cyprus and Slovenia have held strategic dialogues with the US that touched on AI: Cyprus on AI cloud data centers powered by clean energy in October 2024 and Slovenia on research in advanced technologies including AI, and on trustworthy and safe AI systems, in April 2024.[325]

Washington has also begun using trade instruments to set the terms of European access to advanced AI chips. In January 2025, the outgoing Biden administration's AI Diffusion Rule divided EU buyers into two classes. Ten member states—Belgium, Denmark, Finland, France, Germany, Ireland, Italy, the Netherlands, Spain, and Sweden—were exempted from caps on purchases of advanced chips. The rest were limited to about 50,000 advanced GPUs each, and only orders of up to 1,700 chips were exempt from licensing.[326] The Commission responded that the EU should be able to buy American chips without limitations, since it represents an economic opportunity for the US rather than a security risk. The Trump administration withdrew the rule in May 2025,

before it took effect.[327] In August 2025, the EU stated in its trade framework with the US that it intended to buy at least €34 billion of American AI chips for its computing centers. It also planned to adopt technology security requirements aligned with those of the US, which in turn committed to facilitating chip exports once those requirements were in place.[328]

Washington has since applied the same lever to the most advanced AI models. In spring 2026, the American developer Anthropic released its Claude Mythos, a powerful model capable of finding and exploiting software vulnerabilities, to a small group of mainly American companies and agencies, and the Commission tried for weeks without success to obtain access for the EU.[329] An executive order of June 2 introduced a voluntary federal review of up to 30 days before frontier models are released. By July, American developers reportedly needed explicit government approval for the lists of partners with which they share their most advanced models before release.[330] On June 12, a US export control directive suspended all access to Anthropic's Fable 5 and Mythos 5 models for foreign nationals, inside or outside the country, until it was lifted eighteen days later.[331] In early June, Anthropic offered the EU cybersecurity agency ENISA a place among about 150 new organizations in more than 15 countries, but the agency obtained access to Mythos 5 only in September.[332] Mythos 5.1, released in September 2026, is again available only to vetted US organizations.[333] European access to the most advanced American chips and models now depends on Washington's approval.[334]

The EU and several member states have also joined the American-led Pax Silica initiative, whose signatories declare their intention to reduce excessive dependencies in supply chains for semiconductors, critical minerals and AI infrastructure and to cooperate in protecting sensitive technologies and critical infrastructure from undue access, influence or control.[335] Sweden became the first member state signatory on March 17, 2026,[336] and Finland followed on April 16.[337] In June 2026, the Commission signed on behalf of the EU together with Germany, Greece and the Netherlands.[338] Italy joined on July 31, bringing the initiative to twenty-five signatories.[339] Sweden also concluded a bilateral Technology Prosperity Deal with Washington in May 2026, covering AI and connectivity alongside quantum technology, defense innovation, and research security.[340]

China's AI ties in Europe are concentrated in a small group of member states. The European Commission has held two high-level digital dialogues with Beijing, in September 2020 and September 2023, and both covered artificial intelligence alongside other digital issues.[341] Below the EU level, Hungary is the most committed member state. During President Xi Jinping's visit in May 2024, it elevated its ties with China to an all-weather comprehensive strategic partnership, naming artificial intelligence, and in June 2025, its National Economy Ministry signed a dedicated AI memorandum with China's National Development and Reform Commission. China offered cooperation on technology, governance and regulation, applications, policy coordination and the mutual recognition of standards.[342]

France signed a joint declaration on AI and global governance during Xi's May 2024 visit to Paris, whose ten points include commitments on AI risks and on building AI governance on the work of the United Nations, such as the Secretary-General's advisory body on AI and UNESCO's recommendation on AI ethics.[343] Slovakia signed a memorandum on the digital economy in November 2024 that names AI among its areas.[344] Poland and China adopted a joint action plan for 2024 to 2027 that mentions AI among emerging technologies.[345] Spain and Ireland went no further than leader-level statements naming AI as a field of interest.[346] In July 2026, 29 countries founded the China-led World Artificial Intelligence Cooperation Organization (WAICO) in Shanghai, but no EU member state joined, and Belarus, Russia and Serbia are its only European signatories.[347]

In defense, government cooperation on AI focuses on capability and interoperability. In the July 2025 Lancaster House 2.0 declaration, France and the UK committed to developing AI-enabled

algorithms for synchronized missile and drone strikes, holding regular technical exchanges, and exploring joint AI research. The declaration also lists the malign use of AI among the hybrid threats the two countries will deter and respond to.[348] In the October 2024 Trinity House agreement, the UK and Germany committed to developing joint doctrine for future land warfighting and exploring new undersea surveillance capabilities, both supported by AI. The same day, the British defense secretary announced that the German defense AI company Helsing would invest about €420 million in AI systems in the UK.[349] France's defense procurement agency DGA and India's Defense Research & Development Organization signed a technical agreement in November 2025 covering AI, unmanned vehicles, and advanced sensors, among other areas.[350] In June 2026, Canada and France announced a security-of-information agreement that will allow the exchange of classified intelligence in the defense, space, AI, and aerospace sectors.[351] Germany and Israel signed a letter of intent on cyber defense in December 2025, followed the next month by a cooperation agreement that includes joint cybersecurity and AI exercises.[352] In August 2025, Canada and Poland named AI among the technological domains of their defense industrial cooperation.[353]

Agreements on the norms governing military AI remain rare. The only one recorded in our dataset is the joint statement of December 2023 in which the Netherlands and South Korea, building on their 2022 strategic partnership, committed to continue their work on international norms for AI in the military domain by co-hosting the 2024 summit on Responsible AI in the Military Domain in Seoul.[354] EU institutions are almost entirely absent from defense agreements on AI, since defense remains a member state competence. Among these agreements, the US appears only twice: in a memorandum of October 2024 between the Department of Homeland Security and Poland's Ministry of Digital Affairs covering safe and secure AI, and in a Czech-American cyber dialogue of March 2024 that named AI and quantum technologies as priorities.[355] Yet American systems, such as Palantir's software used by NATO and several European security services, are more deeply embedded in European defense than those of any other partner.

Governments also approve foreign AI systems for use on their territory, in both directions, and most such decisions concern the automotive sector, and to a lesser extent healthcare. Luxembourg granted the Chinese firm Pony.ai a robotaxi testing permit in April 2025 and hosts its first European research and testing hub. In April 2026, the Dutch regulator RDW approved Tesla's Full Self-Driving (Supervised) driver assistance system, with provisional validity limited to the Netherlands. In July 2026, Germany's Federal Motor Transport Authority granted the Chinese firm Momenta nationwide approval for Level 4 test drives in urban traffic, where the vehicle drives without a human driver under defined conditions, which Momenta says is the first such approval for a Chinese company.[356] Slovakia's transport ministry, the City of Bratislava, and Slovak Post opened its first national autonomous driving program to the Chinese firm WeRide in March 2026.[357] WeRide also holds driverless permits in France, Switzerland and Belgium, plans robotaxis in Madrid with Uber, and has agreed a partnership with the Danish car-sharing operator GreenMobility to bring its vehicles to Denmark.[358]

In contrast, the American Food and Drug Administration cleared the Belgian firm icometrix's software for grading amyloid-related imaging abnormalities, a side effect of Alzheimer's treatment, in November 2024, after clearing three modules of the German group Siemens Healthineers' chest CT assistant in 2019. The Swedish company Einride won approval in March 2026 to operate autonomous vehicles in Texas, its fifth American state.[359]

On safety governance, the EU cooperates mainly with a circle of like-minded partners. Our dataset records governance, standards, and safety arrangements that pair Europe mostly with the US, the UK, Japan, South Korea, Singapore, Canada, Israel, and India, and with China only through the joint declaration on AI and global governance that France signed in May 2024.[360] National safety institutes also began building these links directly. Poland's research institute NASK signed a memorandum with the Korea AI Safety Institute in January 2026 on joint safety benchmarks and

on implementing the EU AI Act, and Canada and Ireland committed in June 2026 to link the Canadian AI Safety Institute with Ireland's AI Office. At the end of June 2026, the UK and Germany also issued a joint statement linking their AI security institutes and committing to share best practices on AI evaluation.[361]

The Commission's voluntary AI Pact, whose signatories pledge early steps toward AI Act compliance such as an AI governance strategy and a map of their high-risk systems, is joined by firms from outside Europe to signal alignment and secure access to the European market, among them the UK's Vodafone, Japan's Dentsu and Canada's Thinkific. Of the 62 pledges from firms in the 12 partner countries recorded in our dataset, 41 come from American companies. British firms account for seven, Indian firms for four, Japanese and Canadian firms for three each, and Israeli and South Korean firms for one each. Only two come from Chinese companies, Lenovo and Tuya.[362] The American AI developer OpenAI has also signed the EU's General-Purpose AI Code of Practice and, in October 2024, opened a Brussels office.[363]

Partner-by-partner breakdown of cooperation

This section characterizes cooperation with each examined country specifically. Each of the twelve partners has a distinct AI strategy and strengths that shape its interactions with Europe. Each section explains how the country approaches AI, where it cooperates with the EU, and the benefits and risks that cooperation brings for Europe.

United States: The indispensable and asymmetric partner

The US is Europe's principal supplier of AI chips, cloud services, and advanced models, and American firms also finance data centers and invest in European developers and skilling. Cooperation extends to business software, industrial applications, and public services, supported by EU and bilateral technology and trade agreements. US companies also acquire European AI developers, license their models and purchase computing capacity from European data centers. However, projects intended to strengthen European AI autonomy, including sovereign cloud services and Mistral's computing infrastructure, still use American technology. This dependence gives US suppliers influence over access to computing capacity and models and exposes European projects to Washington's export restrictions.

American companies develop leading AI models and supply the cloud infrastructure and processors needed to train and deploy them. Their leading models include OpenAI's GPT, Anthropic's Claude, Google DeepMind's Gemini, Meta's Llama and xAI's Grok. In cloud infrastructure, Amazon Web Services, Microsoft Azure and Google Cloud together accounted for 70% of the European market in 2025.[364] Nvidia designs advanced AI processors, but it relies on Taiwan's TSMC for manufacturing and on the Netherlands' ASML for lithography equipment. US private AI investment reached about €253 billion in 2025, roughly twenty-three times China's €11 billion, although this comparison excludes Chinese government funding.[365]

US federal AI policy prioritizes reducing regulatory requirements, expanding infrastructure and promoting American technology abroad. In January 2025, President Donald Trump ordered agencies to review and reverse measures adopted under his predecessor's AI executive order.[366] The July 2025 AI Action Plan advanced this approach by proposing to remove regulations that hinder AI development, speed up permits for data centers and semiconductor factories, and export packages of American chips, models, and software to allied countries.[367] The administration has also sought to prevent state AI laws from imposing requirements that conflict with its deregulatory approach. In March 2026, the White House followed with a national legislative framework that asks Congress to override state laws regulating AI development, while leaving states their consumer protection and child safety powers.[368] The order did not repeal those laws, and states have continued to legislate. Colorado's revised law, adopted in May 2026 and effective from January 2027, requires disclosure when automated systems influence decisions such as hiring or lending and allows affected consumers to request human review.[369]

Europe's reliance on US chips and models gives Washington the power to limit chip sales to EU countries and require American developers to block European users' access to their models. The January 2025 AI Diffusion Rule would have capped advanced chip exports to seventeen EU member states and exempted the other ten. In May 2025, the Trump administration withdrew the rule before its compliance requirements took effect. Restrictions on AI models later cut off

access to services already available to European users. On June 12, 2026, Washington ordered Anthropic to restrict foreign nationals' access to Claude Fable 5 and Mythos 5. Fable 5 became available again to users worldwide on July 1, nineteen days after the suspension, while access to Mythos 5, previously limited to a small group of cybersecurity partners, was restored only for a set of US organizations.[370]

The EU and Washington have also negotiated agreements on AI research, standards, and chip supplies. The Trade and Technology Council, established in 2021, produced a joint roadmap to evaluate AI risks and coordinate standards, though its last ministerial meeting was in April 2024.[371] A separate 2023 arrangement supports joint AI research in healthcare, climate, energy and agriculture, and the European AI Office and US AI Safety Institute opened a technical dialogue in 2024.[372] The August 2025 trade framework tied technology cooperation more directly to purchases, with the EU declaring its intention to buy at least €34 billion of American AI chips and to adopt and maintain technology security requirements aligned with the US.[373]

Member states also negotiate research agreements and technology partnerships directly with Washington. Sweden's research agencies signed a five-year agreement with the US National Science Foundation in 2024 covering AI alongside 6G and quantum research.[374] Sweden's Technology Prosperity Deal with Washington of May 2026 added commitments on industrial AI and telecommunications.[375] Italy and the US agreed in a 2026 joint statement to expand joint research, researcher exchanges and shared infrastructure, with Italy announcing funding for projects in 2027 and 2028 across priority fields including AI.[376] Cooperation also addresses the security of semiconductor, critical-mineral and data-center supply chains through the US-led Pax Silica initiative. Sweden, Finland, Germany, Greece, the Netherlands and Italy joined in 2026, alongside the EU.[377]

US companies are expanding their AI infrastructure in Europe through direct investment and partnerships with European data-center operators. Amazon plans to invest €33.7 billion in cloud and AI infrastructure in Spain, centered on Aragon.[378] Google's €5.5 billion investment program in Germany covers new and existing data centers as well as offices through 2029.[379] Microsoft and the American AI cloud provider CoreWeave are installing AI processors in data centers operated by European partners.[380] Microsoft plans to invest about €8.6 billion at the Sines campus in Portugal with the Portuguese data-center developer Start Campus and the British cloud provider Nscale,[381] and CoreWeave has partnered with Sweden's EcoDataCenter to host Nvidia Blackwell processors.[382] Meta's five-year agreement with Amsterdam-based Nebius, worth up to €23.5 billion, combines computing capacity reserved for Meta with a commitment to purchase unsold capacity at specified future data-center clusters.[383] AWS launched its European Sovereign Cloud in January 2026 with EU-resident staff and German-incorporated companies, giving customers European control over operations under American ownership.[384]

Nvidia combines AI chip sales with investment in European AI developers and joint development with industrial partners. Its AI chips power Germany's JUPITER supercomputer, and its cooperation with Italy's CINECA and Spain's Barcelona Supercomputing Center includes new AI computing facilities.[385] The company also participates directly in infrastructure projects, joining France's Bpifrance and Mistral and the Emirati investor MGX in a venture planning a 1.4-gigawatt AI campus near Paris.[386] Its investment in Mistral's €1.7 billion funding round and Nebius's €670 million financing also makes it a shareholder in companies developing models and selling computing capacity.[387] Siemens and Nvidia are combining industrial software, simulation, and AI to digitally test production changes before implementing them in factories, starting with Siemens' Erlangen plant.[388] Nvidia's partnership with Nokia, announced alongside an investment of about €860 million in 2025, aims to integrate its computing technology into Nokia's 5G Advanced and 6G mobile-network equipment.[389]

Microsoft supplies both the cloud infrastructure and the AI tools behind European industrial and public-sector applications. In 2024, it announced investment programs of €4.3 billion in Italy[390] and about €3 billion in Sweden to expand cloud and AI capacity.[391] Siemens' Industrial Copilot assists automation engineers and had more than 100 corporate users across Europe and the US by October 2024.[392] Danish pharmaceutical company Novo Nordisk and Microsoft built a platform for drug discovery and clinical research,[393] and Mercedes-Benz tested ChatGPT to help factory employees analyze production data.[394] Microsoft also works with public institutions to introduce AI into administrative work and teach people how to use it. Its training partnerships in Poland, aimed at one million people by the end of 2025, had reached 500,000 participants by July 2025.[395] In Latvia, a December 2024 agreement with four state bodies covered a planned national AI center and a pilot to help the investment agency evaluate projects using AI.[396]

American AI developers distribute their models through European software companies such as Germany's software company SAP, which integrates them into tools for accounting, human resources and supply-chain management. SAP offers Google's Gemini models to developers building applications on its platform[397] and plans to integrate Anthropic's Claude into software that performs tasks such as preparing accounts and adjusting supplier orders.[398] Its Nvidia partnership focuses on adapting models for specialized business tasks,[399] and its Snowflake partnership connects company data across both platforms for analysis and AI development.[400] SAP also incorporates American technology into services designed to keep data and operations under European control. Its EU AI Cloud includes OpenAI alongside France's Mistral AI and Canada's Cohere.[401] The OpenAI for Germany partnership, announced in September 2026, pairs OpenAI's models with Microsoft Azure technology on SAP subsidiary Delos Cloud for German public-sector use.[402]

US companies also buy European AI developers and license their models to add capabilities to their own products. OpenAI's acquisition of Germany's Ona, completed in August 2026, gave OpenAI's Codex team technology that lets AI coding agents work inside customer-controlled cloud environments.[403] AMD's purchase of Finland's Silo AI for about €615 million in 2024 added researchers and engineers experienced in developing models for AMD's AI chips.[404] Meta obtained European image-generation technology through a multi-year licensing agreement with Germany's Black Forest Labs, reportedly worth about €120 million.[405]

OpenAI licenses European news content to improve its models and signs agreements that introduce its tools across companies and education systems. Its 2024 agreements with Le Monde and Prisa Media permit model training on their journalism and news summaries in ChatGPT with links to the original articles.[406] Bertelsmann's agreement combines employee access to ChatGPT with joint development of tools to create and distribute media content.[407] Corporate partnerships extend beyond chatbot subscriptions to adapting OpenAI's technology for specific tasks. Deutsche Telekom agreed to develop customer products and expand AI use in customer care and network operations.[408] Novo Nordisk's partnership covers analyzing research data, identifying drug candidates and improving manufacturing and distribution.[409] OpenAI's corporate agreements also introduce ChatGPT across large workforces. Santander had provided ChatGPT Enterprise to nearly 15,000 employees across Europe and the Americas by August 2025.[410] OpenAI's programs with public institutions combine access to AI tools with training, including workshops and mentoring for small businesses and startup founders in Ireland[411] and classroom use through Estonia's AI Leap program.[412]

Anthropic announced offices in Paris and Munich in November 2025.[413] It also works with the Paris-based start-up Dust, which builds enterprise AI agents on Claude.[414] Anthropic also supplies its models to European organizations through the Accenture Anthropic Business Group, where the Irish consulting firm Accenture plans to train about 30,000 staff on Claude.[415] Greece's Piraeus Bank built its AI hub on Anthropic models,[416] and the European Parliament built its Archibot archive assistant on Claude in Amazon Bedrock.[417] In June 2026, after weeks of from

Mistral AI, a European champion built on American capital and infrastructure

France's Mistral AI is Europe's answer to American AI development, yet American investors financed it from its first month. Lightspeed Venture Partners led a record seed round of about €105 million in June 2023, several weeks after the company was founded, and Andreessen Horowitz led the €385 million Series A that December alongside Salesforce, General Catalyst and Lightspeed. Microsoft bought €15 million in February 2024 when Mistral Large went onto Azure, and General Catalyst led the €600 million Series B in June 2024. In September 2025, the Dutch lithography maker ASML led the €1.7 billion Series C at a €11.7 billion valuation and took about 11%, marking the first time a European investor headed a Mistral round. Nvidia, General Catalyst, Andreessen Horowitz, and Lightspeed all participated in the same round.

Mistral's sovereign computing platform also depends on American hardware. Mistral Compute, announced with Nvidia at VivaTech in June 2025, is planned as 18,000 Nvidia Blackwell processors in Essonne, near Paris. Mistral also distributes its models to enterprise customers through the American platforms Microsoft Azure, Google Cloud and IBM's watsonx. The American network equipment maker Cisco invested in Mistral from its AI fund of about €920 million, built its first AI agent with Mistral in February 2025 and named France one of its global AI hubs that May. Europe's AI champion for frontier models therefore still depends on American investors, chips and cloud platforms.

the Commission, Anthropic admitted the EU cybersecurity agency ENISA to Project Glasswing, its controlled access program for the Mythos model. European institutions can therefore use Anthropic's most capable model only after the American company has vetted them.[418]

In security, the US company Palantir supplies several European intelligence services and armed forces with software enabling large-scale data analysis.[419] France's domestic intelligence service DGSI used the software during the 2024 Olympics and renewed it for three years in December 2025, before Paris announced in June 2026 that it would gradually replace Palantir with ArgonOS, built by the French ChapsVision.[420] Spain's armed forces awarded Palantir a €16.5 million intelligence fusion contract in October 2023,[421] Bavaria's police use its VeRA platform,[422] and Poland's defense ministry signed a letter of intent with the company in October 2025.[423] In March 2025, NATO awarded Palantir its Maven Smart System to support intelligence fusion, targeting, and planning across Allied Command Operations, placing American-built AI at the heart of European collective defense.[424]

China: Cooperation under growing economic security scrutiny

Despite growing security concerns, China and Europe remain closely connected across the AI ecosystem through research and commercial partnerships. These ties are increasingly shaped by concerns over data protection, cybersecurity, political bias and technological dependence. Chinese suppliers continue to provide servers and other equipment for Europe's AI infrastructure, but these systems remain heavily dependent on US-designed hardware. Chinese cloud and data-center providers also operate in Europe, but their market share remains marginal compared with dominant US providers.

China pursues AI as a state-directed national project, viewing it as a core technology for economic development, military modernization, national security, and social stability. Since adopting the

2017 New Generation Artificial Intelligence Development Plan, which set out a roadmap for China to become a major global AI innovation center by 2030, Beijing has progressively expanded its AI policy framework.[425] Most recently, it launched the 2025 AI Plus initiative, which seeks to accelerate AI adoption across research, industry, consumption, and public governance through 2035.[426] In 2025, China launched the €7.7 billion National AI Industry Investment Fund, backed by the state chip fund, to invest in early-stage AI projects.[427]

This state-led framework is complemented by a highly competitive private-sector ecosystem: DeepSeek's low-cost R1 reasoning model challenged prevailing assumptions about the cost and resources required to develop advanced AI models in early 2025; Alibaba's Qwen, the most-downloaded open-model family in the world; ERNIE, developed by Baidu, which ranked second after iFlytek in the number of government and enterprise procurement contracts for general-purpose large models in 2025; and ByteDance's Doubao and Moonshot's Kimi.[428] According to Stanford's AI Index, China produced 35 notable models in 2025, coming second behind the US with 59 models.[429]

China has progressively built a regulatory framework for public-facing AI services, seeking to balance promoting innovation with control over societal applications.[430] The Provisions on the Administration of Algorithmic Recommendations in Internet Information Services, in force since 2022, introduced security-assessment requirements and mandatory filing, requiring providers that can shape public opinion or mobilize society to register their algorithms.[431] The Provisions on the Administration of Deep Synthesis of Internet Information Services, effective in 2023, extended regulation to AI-generated and manipulated images, audio and video, requiring content identification, user verification and measures against harmful or misleading synthetic content.[432] Rules effective from 2023 regulate generative AI services offered to the public in China.[433] Since September 2025, AI-generated content must also carry visible labels and machine-readable identifiers or watermarks.[434] An amendment to the Cybersecurity Law in force since January 2026 added the law's first article on AI, and interim measures on human-like interactive AI services, such as AI companions, took effect in July 2026.[435] Compared to Brussels, which applies a single horizontal regulation across sectors built around individual fundamental rights and product safety, Beijing is predominantly focusing on public-facing services with potential effects on public opinion and social mobilization using a set of targeted technology-specific laws, although the State Council's legislative plan of May 2026 calls for faster work on comprehensive AI legislation.[436]

Beijing is also seeking to play a leading role in shaping international AI governance through its Global AI Governance Initiative and the July 2026 establishment of the WAICO, an intergovernmental organization aimed at AI cooperation, capacity building and expanding access to AI technologies, infrastructure, and expertise in developing countries.[437] So far, Serbia, Belarus and Russia are the only European countries to have joined WAICO. It remains to be seen whether the announcement will translate into concrete projects.[438]

The Chinese military is increasingly adopting domestic AI systems as part of its shift toward "intelligentized warfare." PLA procurements show that several defense companies have secured contracts to develop AI tools to improve planning and advanced analysis of satellite and drone imagery, and a dozen procurement notices published in 2025 explicitly called for tools based on DeepSeek models.[439] In February 2025, Chinese defense SOE Norinco unveiled an autonomous unmanned ground vehicle powered by DeepSeek.[440]

As China pursues technological self-reliance and its military-civil fusion strategy, the EU increasingly approaches engagement with China on AI through an economic-security lens. In 2023, the Commission identified AI as one of four technology areas requiring immediate security-risk assessment, alongside advanced semiconductors, quantum technologies and biotechnology, citing their transformative potential, relevance to both civilian and military

applications, and the risk that they could be used to violate human rights.[441] The EU has also restricted research cooperation with China in critical technologies. Under the 2026-27 Horizon Europe rules, Chinese entities may be excluded from specific projects in AI, semiconductors, quantum technologies and biotechnology. Likewise, in January 2025, the Commission called on member states to review outbound investments in third countries in AI, semiconductors and quantum technologies for potential economic-security risks. While the recommendation is formally country-agnostic, it was adopted largely in response to concerns about technology transfers to China.[442]

Cooperation with China in AI at the EU level thus remains limited and mostly confined to areas such as global AI governance and data governance. In 2023, the European Commission and China held their second High-Level Digital Dialogue, covering AI, cross-border data flows and platform regulation. In Beijing, European Commission Vice-President Vera Jourova stressed the need to engage China in "designing effective governance at the multilateral level" on AI risks.[443] Similarly, during President Xi's state visit to France in May 2024, France and China issued a joint declaration on AI and global governance, committing to promote secure, reliable, and trustworthy AI systems.[444]

Some member states have nevertheless maintained a more open approach to bilateral cooperation with China on AI. Under previous Orbán administrations, Hungary has been particularly receptive to Chinese investment and technology partnerships. In 2020, Huawei announced a research and development (R&D) center in Budapest focused partly on AI, which Foreign Minister Péter Szijjártó described as a milestone in Hungary's Eastern Opening strategy.[445] In 2024, during Xi's state visit to Budapest, Hungary and China elevated their relationship to an "all-weather comprehensive strategic partnership" and explicitly agreed to promote cooperation in emerging fields including AI.[446] In June 2025, Hungary's economy ministry signed a dedicated AI memorandum with China's National Development and Reform Commission, aimed at self-driving vehicles and the competitiveness of SMEs.[447] However, the new Magyar government, which took office in May 2026, is likely to shift the bilateral relationship's direction and has promised to review Chinese investments.[448] Later that year, Slovakia also elevated ties with China to a strategic partnership during Slovak Prime Minister Robert Fico's visit to China. The two sides signed an MoU on Cooperation on the digital economy, explicitly mentioning 5G, cloud computing, satellite navigation, data centers, AI, and the IoT.[449] The two sides reaffirmed this during Slovak President Pellegrini's July 2026 visit, when they agreed to expand cooperation in AI, robotics, the digital economy, and clean energy.[450] Besides Hungary and Slovakia, Ireland has also signaled openness to cooperation with China in AI, most recently during Irish Taoiseach Micheál Martin's January 2026 visit to China.[451]

Following China's "AI sputnik moment" with the launch of DeepSeek in early 2025, the Chinese model attracted scrutiny from a number of European data protection authorities. Regulators in Slovakia, Czechia, the Netherlands, Estonia, Luxembourg, Poland, and Lithuania issued public warnings, while authorities in Denmark, Czechia, Belgium, and the Netherlands restricted or banned its use in certain state institutions.[452] Italy even restricted access to DeepSeek's mobile app through official app stores after raising concerns that users' data were being transferred to and stored in China without adequate safeguards under the GDPR.[453]

Concerns about the security risks of using Chinese AI services are not unfounded. Recent findings suggest that popular Chinese models generate lower-quality, more vulnerable code when they detect they are being prompted by a user that appears to be from the US government.[454] Cisco has also raised concerns about DeepSeek's safety mechanisms, which may have been compromised to keep training costs down. In its testing, DeepSeek R1 recorded a 100% attack success rate, failing to block any of the harmful prompts used in the evaluation.[455]

At the same time, recent temporary restrictions on access to advanced US models for foreign nationals, together with rising token prices for leading proprietary models, are pushing European companies to diversify their AI system providers and turn to lower-cost Chinese open-weight models.[456] Importantly, Chinese open-weight models can run on European or company-controlled infrastructure, helping ensure data security. There are currently no representative data on the uptake of Chinese AI models among European companies, but several major European firms have publicly acknowledged using or experimenting with Chinese open-weight models.[457] Executives from Siemens, French data-analysis company ChapsVision, automotive manufacturer Renault and telecom operator Orange have indicated that their companies already use combinations of US, European and Chinese models.[458] According to a survey published by the German digital association Bitkom in September 2026, German companies still rely overwhelmingly on US-developed AI models; only 2% reported using DeepSeek and just 1% of Alibaba's Qwen.[459]

A growing number of European cloud and inference providers are hosting Chinese-developed open-weight models such as DeepSeek, Qwen and GLM on European infrastructure.[460] This gives European companies access to comparatively high-performing, cost-efficient models while keeping data within European-controlled environments, helping them comply with the GDPR and reducing regulatory and security risks associated with both Chinese data regulations and extraterritorial US legislation such as the CLOUD Act. For instance, OVHcloud provides Alibaba's Qwen and DeepSeek from its Gravelines data center in France.[461] However, such anecdotal evidence may overstate actual adoption.

Even when Chinese models are hosted in European data centers, however, important questions remain about the provenance of their training data, embedded biases, security vulnerabilities and the quality of model documentation.[462] Research has found that some Chinese models reproduce Beijing-aligned political narratives not only in their answers but also in the code they generate.[463] An experiment conducted by CEIAS similarly found that some Chinese LLMs, when prompted about human rights, political opposition or ethnic minorities in third countries, often stopped answering about that country and instead reverted to official Chinese government positions.[464]

Through Lenovo, the Chinese PC and server maker, China has a strong footprint in Europe's high-performance infrastructure. While Lenovo continues to supply major European HPC systems, the recent flagship EuroHPC procurement has increasingly relied on systems supplied by France-based Bull, formerly part of Atos and subsequently Eviden, and US-based Hewlett Packard Enterprise. Moreover, Lenovo's systems rely on Intel or AMD CPUs and Nvidia GPUs. The company is also supplying infrastructure to private GPU cloud and AI data-center operators. It provides servers and cooling infrastructure for Nscale's Icelandic AI facility, designed to support almost 7,000 Nvidia Blackwell Ultra GPUs,[465] while Italian cloud provider Seeweb uses Lenovo servers for its GPU-as-a-service offering.[466] Since 2022, the company has also operated a plant in Üllő near Budapest that builds servers, storage systems, and workstations for Europe, the Middle East, and Africa, with capacity for more than 1,000 servers a day.[467] In October 2023, Lenovo moved its HPC and AI innovation center to the same site, where customers can test systems in person or remotely before buying them, and where the company runs its first European facility for testing and demonstrating the liquid cooling increasingly powerful AI servers need.[468]

Chinese companies also maintain a presence in the European market as cloud providers and data-center operators. Huawei Cloud operates its primary Western European cloud hub and regional data center in Dublin, Ireland, and claims to support more than 7,000 European organizations through its cloud platform.[469] Alibaba Cloud operates two availability zones in Paris and three data centers in Germany,[470] while Tencent Cloud plans to add a third availability zone there in 2026.[471] However, Chinese cloud platforms remain relatively marginal in the EU market compared to US hyperscalers, with AWS, Microsoft and Google together accounting for approximately 70% of the European cloud market in mid-2025.[472]

Lenovo, supplying European HPC systems

Lenovo is a major supplier of HPC systems, servers and related infrastructure. A 2020 European Commission assessment found that Lenovo supplied 35 of the 76 EU-based systems, making it the largest single vendor in the dataset, ahead of France's Atos/Bull with 18 systems.473 Lenovo-supplied European systems include:

- **Snellius**, the Netherlands' general-purpose high-performance computing system, used by Dutch universities, research institutes, government organizations and companies for large-scale scientific computing, data processing and machine learning;[474]
- **MUSICA**, Austria's high-performance computing system operating across Vienna, Linz and Innsbruck and ranking among the world's top 100 fastest systems;[475]
- **Otus**, a high-performance computing system at Germany's Paderborn Center for Parallel Computing, designed to support advanced research in AI, physics and engineering;[476]
- **LISE**, a high-performance computing system at the Zuse Institute Berlin in Germany, supporting interdisciplinary research in applied mathematics and data-intensive computing;[477]
- **Pitagora**, a high-performance computing system hosted by CINECA in Italy and inaugurated in 2025, used for European nuclear fusion research.[478]

Research and innovation is one of the liveliest areas of China–Europe AI cooperation. European scientists work with their Chinese counterparts in university and corporate R&D labs and jointly publish scientific papers. The China-Europe Academic Engagement Tracker's comprehensive mapping of EU-China academic cooperation identified 133 formal partnerships in EU member states that explicitly name AI as a cooperation area, with the largest share involving French research institutions.[479] CEIAS analysis of co-publication patterns identified over 34 000 AI-related outputs jointly authored by researchers affiliated with Chinese and EU institutions between 2015 and 2025.[480] Although the EU and some member states have increased scrutiny of research partnerships with China in critical technologies, collaboration continues to grow, including with Chinese partners affiliated with China's defense research and military-industrial system. For example, the Beijing Institute of Technology and the University of Groningen established a Joint Research Laboratory on Intelligent Systems and Control in 2019, focused on learning, control, and computational intelligence for autonomous systems. Beihang University and Harbin Institute of Technology have also maintained partnerships with the French engineering school CentraleSupélec.[481]

Chinese companies also reach European AI research through universities. For example, Huawei has cooperation agreements with about a dozen of them, several of which cover AI.[482] In 2021, Huawei and the Technical University in Košice established an AI research center.[483] That same year, Huawei signed a formal cooperation agreement with the University of Bologna specifically covering AI, and the company explicitly asked to be involved in EU-funded projects through the university.[484] The company also opened a Digital Competence Center in Saarbrücken, Germany, focusing on AI and cybersecurity research.[485]

European companies have also maintained strong R&D ties with Chinese researchers and institutions. For instance, in March 2020, German automotive and industrial technology company Bosch partnered with China's Tsinghua University to establish a Joint Research Center for

Machine Learning. Since its inception, the center has produced more than 100 research papers and filed multiple patents, and its research topics include probabilistic deep learning, explainable machine learning, meta-learning, neuro-symbolic AI, and Natural Language Processing (NLP).[486]

Commercial AI partnerships are concentrated primarily in automotive applications,[487] enterprise software and life sciences, with many collaborations aimed specifically at the Chinese market. For example, the German automaker Volkswagen's CARIZON joint venture with Horizon Robotics is developing an intelligent-driving platform.[488] Siemens, the German industrial technology group, opened its first Asia-Pacific industrial AI hub in Beijing in 2019, focused on AI applications for industrial clients in areas such as manufacturing, buildings and transportation.[489] Siemens has also explored integrating Alibaba's Qwen models into its software to support AI-assisted engineering workflows as part of its partnership with Alibaba.[490] Similarly, in 2025, Germany's SAP has also expanded its partnership with Alibaba, exploring the integration of Alibaba's Qwen models into SAP's enterprise AI offerings in China and planning to deploy SAP's AI and cloud solutions on Alibaba Cloud infrastructure.[491] In life sciences, France's Sanofi has partnered with Beijing-based BioMap to use AI and protein language models to identify and design potential new biologic drugs.[492]

Huawei, in particular, has also been very active in talent development activities in Europe. It has built a relatively extensive university-facing ecosystem, including Huawei ICT Academies, student competitions, scholarships, and exchange programs. These include university partnerships that offer courses and professional certifications in areas such as AI, cloud computing, cybersecurity, networking, and storage. By 2021, Huawei reported establishing 147 ICT Academies and certifying more than 20,000 professionals in Europe.[493] Its Seeds for the Future program combines training in technologies such as AI, 5G and cloud computing with entrepreneurship, competitions and exchanges linked to China. Between 2021 and 2025, Huawei has also funded scholarships for 16 students at the College of Europe in Bruges.[494] Although Huawei selected the recipients independently, it shared their names and met with its Brussels public-affairs team periodically.[495] Other education initiatives include Alibaba Cloud's partnership with Brest Business School on AI, cloud computing and digital innovation.[496] These programs build skills while strengthening the long-term institutional presence of Chinese technology companies and universities in European AI ecosystems.

Chinese investment in European AI companies remains relatively limited. Between 2017 and 2022, investors from China and Hong Kong participated in around 1.2% of investments in the European AI sector, while European investors contributed to 3.7% of investments in China.[497] Notable examples include Lenovo Capital's 2023 investment in Berlin-based foundation-model developer Nyonic, where Lenovo was the sole investor in a funding round worth tens of millions of euros.[498] By February 2024, four of the startup's five founding members had left due to concerns about a shift toward a China market-facing strategy.[499]

United Kingdom: The insider-outsider of European AI

The UK is arguably the EU's closest AI partner, linked by geography, shared values, and research communities that have continued to cooperate closely through Brexit. Although it regulates AI far more lightly than the EU, it has become an important partner on AI safety through its AI Security Institute. The UK has rejoined Horizon Europe and the EuroHPC network, will host an AI Factory Antenna in Edinburgh, and is building data centers in each other's markets with British and European companies. France and Germany are its closest bilateral partners, with agreements that extend to defense, and European pharmaceutical groups have acquired or contracted British AI firms for drug discovery.

The UK's legal approach to AI is less strict than the EU's, as it relies mostly on soft law, policy initiatives, and rules in related domains rather than a horizontal law like the EU AI Act.[500] However, in July 2024 the UK Competition and Markets Authority signed a joint statement with the European Commission and the US competition authorities on principles for fair competition in AI, including interoperability and choice.[501] While the UK announced its AI bill to regulate the field during the July 2024 King's Speech, which sets out the government's legislative program for the new parliamentary session, no such specific bill has since materialized, and the 2026 King's Speech has not mentioned it.[502] In 2025, the Keir Starmer government committed about €2.35 billion to expand the UK compute capacity twentyfold by the end of the decade. The government has also allocated almost €600 million to the Sovereign AI Unit, a fund that invests in British AI companies working on compute infrastructure, foundation models, health and life sciences, and scientific discovery.[503] As of October 2026, the fund's portfolio lists seven companies, in fields such as bioengineering, materials and data infrastructure.[504] In April 2026, ministers in the Starmer government resisted aligning the UK with the EU's AI rules, as the UK's more laissez-faire approach was seen to have attracted investment. [505] Andy Burnham, who became Prime Minister in July 2026, had signaled before taking office that he was inclined to reverse this approach and regulate the sector.[506]

The UK established its AI Security Institute (AISI) within the Department for Science, Innovation and Technology as one of the world's first bodies of its kind, and in May 2024 it helped launch the first international network of AI safety institutes.[507] AISI's work follows the November 2023 Bletchley Declaration, signed by 28 countries and the EU. The declaration focuses on the safety of frontier models and the responsibility of their developers, and its signatories committed to identifying frontier AI safety risks and building policies to address them.[508] In February 2024, AISI also launched a partnership with France's Inria to support the safe and responsible development of AI.[509] British institutions also take part in the European Lighthouse on Secure and Safe AI, a European research network on safe and secure AI. Lancaster University, the University of Birmingham, the University of Oxford, and the Alan Turing Institute are among its 26 founding

British AI infrastructure companies also build data centers in the EU, particularly in Finland, where Nscale is developing an AI data center whose power capacity has yet to be determined.[510] In July 2026, British developer Pure DC launched one of Europe's largest AI data center projects in Seinäjoki, Finland, with 550 MW of capacity and a planned investment of €7.5 billion. It would be the largest investment by a British company in Finland to date.[511] Fluidstack, a UK-based AI cloud platform, partnered with French data center specialist Eclairion to build Europe's largest GPU supercomputer near Paris for French foundation model developer Mistral. The data center is set to run on 100% decarbonized electricity from nuclear and renewable sources.[512] Meanwhile, Amsterdam-based AI infrastructure company Nebius is expanding in the UK. It is deploying AI infrastructure in Wales and Surrey and plans a further investment of up to almost €2 billion in London.[513]

The UK AI Factory Antenna

In 2024, the UK joined the EuroHPC Joint Undertaking, regaining access to shared European supercomputing infrastructure and eligibility for its grants. In May 2025, the UK and the EU agreed to cooperate on AI supercomputers, which allowed UK organizations to apply to host an AI Factory Antenna. The Antenna gives UK researchers and companies direct access to the European AI Factories network and its EuroHPC computing resources, data, training and software support. Like the other Antennas, the EU and the host country jointly fund the UK Antenna, with the EU covering up to half the costs, or up to €5 million. It will be hosted at EPCC, the national supercomputing center at the University of Edinburgh.

The UK's association with Horizon Europe, the EU's research and innovation program with a budget of €95.5 billion, allows British universities to take full part in European research. Under Horizon Europe, the German Research Center for Artificial Intelligence (DFKI) works with the University of Nottingham on AI robotics. The Czech Technical University in Prague and the National and Kapodistrian University of Athens also worked with Imperial College London from 2022 to 2025 on non-discriminatory AI algorithms.[514] Such research cooperation is substantial, with our dataset identifying at least 13 EU-UK AI cooperation projects funded under Horizon Europe or its predecessor, Horizon 2020. Notably, the UK also cooperates with Google DeepMind, the British-based subsidiary of the US company Google, which, alongside the European Molecular Biology Laboratory's European Bioinformatics Institute, provides open access to highly accurate protein structure predictions from the Nobel-prize-winning AlphaFold AI system for the global scientific community.[515]

Bilaterally, the UK works most closely on AI with France and Germany, Western Europe's largest economies. The UK and France signed a "Sci Tech deal" on AI in health and will partner on their supercomputers and AI incubators.[516] In July 2025, Paris and London signed the Lancaster House 2.0 Declaration, which modernizes their 2010 defense treaties and covers nuclear deterrence, military forces, industrial cooperation, cyber capabilities and responses to hybrid threats. The declaration now explicitly includes AI, with plans to develop algorithms for synchronized missile and drone strikes using AI and machine learning, regular technical exchanges and joint research.[517] Germany and the UK also include AI in their Strategic Science and Technology Partnership.[518] In their October 2024 Trinity House defense agreement, Berlin and London also noted the importance of AI to their defense cooperation.[519] The UK also brings researchers from EU member states together with British colleagues through programs such as the UK-Italy Trustworthy AI Visiting Researcher Program[520] and a UK-Romania research conference on AI. [521]

European corporations engage with British AI companies, particularly in life sciences. For example, in 2023, Germany's BioNTech acquired the London-based AI company InstaDeep to develop immunotherapies with AI and machine learning.[522] Germany's Merck KGaA, the world's oldest pharmaceutical company, partnered in 2023 with the UK's BenevolentAI and Exscientia (acquired in 2024 by US-based Recursion) to improve its drug discovery capabilities using AI. Exscientia also signed a 2022 deal with the French pharmaceutical group Sanofi to develop up to 15 drug candidates in oncology and immunology, worth up to about €5 billion in milestone payments.[523] Outside life sciences, the German carmaker Mercedes-Benz and the European carmaker Stellantis have invested in the British autonomous driving company Wayve. The two investments prepare to deploy Wayve's driving platform in consumer vehicles in the coming years.[524]

India: Partner for applied and industrial AI

India is emerging as an increasingly important AI partner for Europe, offering a rapidly expanding talent base, a large digital market, a strong IT-services sector and growing compute capacity, with particular strengths in practical, multilingual and sector-specific AI applications. Cooperation is supported politically at both the EU and bilateral levels and is rooted in joint research, industrial deployment, and application-oriented partnerships spanning enterprise AI, telecommunications, healthcare, mobility, and defense.

India's National Strategy for AI, developed by the National Institution for Transforming India and introduced in June 2018, set out an "AI for All" approach aimed at using AI to support economic growth, social development and inclusive growth while positioning India as a global hub for developing scalable AI solutions for other emerging and developing economies. The strategy identifies five priority areas for AI intervention where government support could generate significant societal benefits: healthcare, agriculture, education, smart cities and infrastructure,

and smart mobility and transportation. It also calls for stronger AI research capabilities, workforce skilling and reskilling, broader adoption of AI solutions, and frameworks to ensure ethical AI development.[525]

The flagship IndiaAI Mission, originally approved in March 2024 with an outlay of approximately €1.1 billion, seeks to expand affordable access to computing power, develop indigenous foundation models and Indian-language AI, improve access to datasets, support startups and research, and strengthen the domestic talent base.[526] Its subsidized shared-compute program has expanded rapidly from an initial target of 10,000 GPUs to more than 45,000 installed by mid-2026, with estimates that it could reach about 100,000 by the end of 2026.[527] India is thus approaching the scale of one EU AI Gigafactory, while the EU plans seven.[528]

India is entering the global AI race with a rapidly expanding talent base, supported by large-scale national skilling programs, the integration of AI into school and university curricula, and training initiatives for both the private and public sectors.[529] India is the second-largest producer of AI talent after the US, with one of the fastest growth rates globally.[530] India is also competitive in R&D and innovation, ranking fifth globally in generative artificial intelligence patents published between 2014 and 2023.[531] At the same time, India has long been a major exporter of STEM talent, making retention and attraction of highly trained AI professionals a key policy priority.[532]

While India continues to trail the US and China in frontier-model development and private AI investment, cumulative private investment in India between 2013 and 2025 reached €13.4 billion, compared with approximately €659.4 billion in the US and €114.8 billion in China.[533] India's strength lies in practical AI applications and enterprise solutions, supported by its traditionally competitive IT-services industry and extensive digital public infrastructure.[534] According to government statistics, nearly 89% of new startups launched in 2024 used AI in their products or services.[535]

India's startup ecosystem is also expanding rapidly, with India becoming the world's second-largest generative AI startup hub in 2025. However, further growth is constrained by compute scarcity, risk-averse capital markets, and the limited availability of long-term investment capital willing to support firms before they become profitable.[536]

Unlike the EU's horizontal AI Act, New Delhi lacks a comprehensive AI law, relying instead on existing legislation and a principle-driven governance approach.[537] AI systems that process personal data fall under the Digital Personal Data Protection Act 2023 and its 2025 Rules, which require Significant Data Fiduciaries to ensure algorithmic systems do not pose risks to individuals' data-protection rights. The core obligations are scheduled to take effect in May 2027.[538] In November 2025, the Ministry of Electronics and Information Technology released the India AI Governance Guidelines 2025, emphasizing seven guiding principles, including trust as the foundation, a people-first approach, innovation over restraint, fairness and equity, accountability, understandability by design, and Safety, resilience, and Sustainability.[539] In February 2026, amendments to the IT Rules introduced due diligence obligations for AI-generated and manipulated content, including labeling requirements and a dramatic reduction in content removal windows.[540]

India seeks to position itself as a distinct voice in global AI governance, promoting a "third way" between the US market-led and Chinese state-centric approaches, emphasizing broad AI adoption, inclusion, and practical safeguards, particularly for developing countries and the Global South. [541] In February 2026, India hosted the AI Impact Summit in New Delhi, the successor to the Bletchley, Seoul and Paris summits, bringing together delegations from 118 countries and producing the New Delhi Declaration on AI Impact. This document was endorsed by 88 countries and delineated seven priorities, including human capital, access, trustworthiness, energy efficiency, AI for science, democratization of AI resources and economic growth.[542]

At a 2020 summit, the EU and India pledged to engage on AI, including promoting global standards and fostering its safe and ethical deployment.[543] However, a more practical level of cooperation came about with the establishment of the EU–India Trade and Technology Council (TTC) in 2023, which led to the creation of a dedicated working group on Strategic Technologies, Digital Governance, and Digital Connectivity covering AI, semiconductors, High-Performance Computing and 6G. At the second and third TTC meetings in 2025 and 2026, the EU and India agreed to deepen cooperation on safe, responsible and human-centric AI, including closer links between the European AI Office and the IndiaAI Mission, cooperation on LLMs and responsible AI tools, and exchanges on AI adoption and governance, with healthcare identified as a potential focus area.[544] The broader objective is to develop a more structured EU–India framework for cooperation on AI, alongside joint activities in high-performance computing and quantum technologies.[545]

The deepening of EU-India relations has accelerated in the context of intensifying US–China technology competition and the uncertainty over US trade and technology policies. The growing emphasis in both New Delhi and Brussels has created new opportunities for deeper cooperation through joint ventures, joint research projects, and R&D initiatives.[546] Under the Joint Comprehensive Strategic Agenda toward 2030, adopted at the 16th EU–India Summit in January 2026, the two sides agreed to establish India–EU Innovation Hubs and an India–EU Startup Partnership, promote collaborative research in AI, quantum technologies and advanced semiconductors, and cooperate on semiconductor design and prototyping for AI applications. The statement calls for cooperation in strategic AI domains, including LLMs, multilingual natural language processing datasets, AI training datasets, and AI solutions for public goods such as healthcare, agriculture, and climate action.[547]

India's emergence as an attractive partner in critical technology has prompted EU member states to pursue bilateral AI cooperation with India, particularly over the past two years. In February 2025, at President Emmanuel Macron's invitation, France and India co-chaired the AI Action Summit 2025 in Paris. At this occasion, they adopted a bilateral Declaration on AI that sets out shared principles for safe, trustworthy, and human-centered AI, as well as practical cooperation on compute, multilingual LLMs, industrial partnerships, digital public infrastructure, research, and AI governance.[548] In February 2026, India and France opened the Indo-French Center for AI in Health at All India Institute of Medical Sciences in New Delhi and Inria, France's national research institute for digital science and technology, and India's Department of Science & Technology (DST) announced the establishment of the Indo-French Center for Digital Sciences.[549] During Prime Minister Narendra Modi's June 2026 visit to France, the two sides adopted the India-France Innovation Roadmap 2030, with "trusted AI" as a central pillar of their partnership, and announced a Joint India-France AI Working Group focused on AI governance.[550][551]

In November 2025, India's Defense Research & Development Organization and France's Directorate General of Armaments signed a Technical Agreement to deepen defense R&D collaboration, covering AI alongside cybersecurity, autonomous systems, quantum technologies, advanced sensors, and other strategic technologies.[552] This also reflects the broader deepening of EU–India security and defense ties, formalized through the first EU–India Security and Defense Partnership signed on January 27, 2026, which lists AI and other emerging and disruptive technologies among specific areas of cooperation.[553]

Building on the bilateral dialogue launched in 2017, Germany and India launched an India–Germany AI Pact in February 2026 focused on cross-sectoral collaboration in industrial and governance AI, responsible AI development, and exchanges of experience on the EU AI Act, as well as research and talent exchanges. The pact also includes joint work on compute capacity, sector-specific language and vision models.[554]

In November 2024, India and Italy pledged to deepen cooperation on AI in the Italy-India Joint Strategic Action Plan 2025-2029.[555] In May 2026, the prime ministers of India and Italy elevated India-Italy relations to a Special Strategic Partnership, advancing further cooperation in AI and announcing the creation of INNOVIT India, an innovation hub in India.[556] In a joint editorial, the two leaders write that the newly forged partnership "seeks to ensure that AI acts as a catalyst for social empowerment."[557]

Upon establishing a Strategic Partnership at the Gothenburg Summit in May 2026, Sweden and India agreed to launch the India-Sweden Joint Innovation Partnership 2.0 and establish a virtual India-Sweden Joint Science and Technology Center with a strengthened focus on emerging technologies such as AI. The Joint Action Plan also calls for connecting the two AI ecosystems and developing the Sweden–India Technology and Artificial Intelligence Corridor between Business Sweden and India AI Mission.[558]

Other countries that have identified AI as an area of collaboration with India include Finland,[559] the Netherlands,[560] Slovakia,[561] Slovenia, Spain, Austria (research collaboration),[562] Portugal (with a focus on deploying AI in public services)[563], Luxembourg,[564] Cyprus,[565] and Denmark.[566] India's AI Impact Summit also saw the creation of two new Czech–Indian collaboration agreements.[567]

Joint R&D activities have been mostly driven by partnerships between European universities and companies and Indian institutes of technology. Bosch helped establish the Robert Bosch Center for Data Science and Artificial Intelligence at the IIT Madras in 2017, with funding for research in deep learning, reinforcement learning, interpretable machine learning, manufacturing analytics, smart cities and healthcare.[568] Ericsson became a five-year partner of IIT Madras' Center for Responsible AI in 2023, supporting work on trustworthy, explainable and bias-aware AI for future networks and, together with the Indian Statistical Institute, established a collaborative research center in 2024 on safe and reliable cyber-physical systems with immediate impact in deploying AI and CPS in the Indian ecosystem.[569] Siemens Healthineers and IISc Bengaluru launched a collaborative laboratory in 2024 for AI in precision medicine, focused on open-source AI tools for neurology research and their integration into clinical workflows.[570]

India's large technology talent base and growing demand for industrial and enterprise AI have made it an increasingly important hub for European technology companies to develop and deploy. For example, Siemens employs more than 10,000 software and AI specialists in India who

GANANA, Building an EU–India Partnership in High-Performance Computing

GANANA is an EU research and innovation project funded by the EuroHPC Joint Undertaking with a budget of approximately €5 million. Running from 2025 to 2028 and coordinated by Linköping University in Sweden, it aims to establish a long-term Europe-India partnership in high-performance computing through joint research, knowledge exchange, shared computing resources and the optimization of scientific software for advanced HPC systems.

The project brings together beneficiaries from seven European countries and India and focuses on three application areas: life sciences, geophysical hazards, and weather and climate modeling. Three EuroHPC Centers of Excellence–BioExcel, ChEESE and ESiWACE3–cooperate with five Indian institutions, including the Center for Development of Advanced Computing, the India Meteorological Department, the Institute for Seismological Research, the National Institute of Immunology and AIRAWAT. Research applications include biomolecular modeling and drug discovery, earthquake and tsunami simulation, and high-resolution weather and climate forecasting. GANANA uses major European HPC systems, including LUMI in Finland, LEONARDO in Italy and MareNostrum 5 in Spain, alongside India's AIRAWAT platform.

contribute to technologies underpinning its global industrial AI strategy, which combines AI, digital twins, and automation.[571] Capgemini is investing in building an AI-ready workforce through AI Centers of Excellence and AI Futures Labs in India.[572]

European and Indian companies are also engaged in joint AI development. In May 2026, Tata Consultancy Services announced a strategic partnership with French AI company Mistral to design, fine-tune and deploy domain-specific AI systems for enterprises and governments worldwide. Tata Consultancy Services became the first major global IT services company to partner with Mistral Forge and is establishing a dedicated Mistral Center of Excellence.[573]

France's Safran Electronics & Defense and India's SatSure also signed an MoU in June 2026 to jointly develop AI-enabled geospatial intelligence solutions that combine satellite imagery, advanced AI models, and operational intelligence.[574] Germany's BMW Group and Tata Technologies have established a joint venture to develop software-defined vehicles, automated driving, and AI applications such as intelligent navigation and voice assistants, predictive vehicle intelligence, and machine-learning-based driver-assistance systems.[575] To further spur commercial synergies, Berlin-based FIWARE Foundation and the German Indian Innovation Corridor are developing a bilateral innovation platform around sovereign AI, data spaces, digital twins and open-source digital infrastructure, with plans for a FIWARE Innovation Hub in India, joint training and work on joint standardization, and participation in European and Indian funding programs.[576]

Telecommunications has emerged as another particularly concrete area of cooperation. Finland's Nokia is working with Bharti Airtel on autonomous-network capabilities, including GenAI for service orchestration and assurance as part of Airtel's 5G core modernization.[577] Nokia is also working with Airtel on network APIs that let developers build services that combine AI, 5G, and edge computing.[578] Germany's O2 Telefónica is working with Indian IT services company Tech Mahindra on a telecom-specific Large Telco Model that uses generative and agentic AI to automate network operations, including fault analysis, technician dispatch and service management, as part of Telefónica's transition toward autonomous networks.[579] Wipro, an Indian technology services and consulting company, is helping Telefónica automate Telco Cloud operations using AI and machine learning.[580]

Focusing on the AI application layer, Dutch investment group Prosus is building its AI portfolio in India. In 2025, it backed three Indian AI startups–Arivihan Technologies, an automated online learning platform, Bengaluru's CodeKarma, a software productivity platform powered by AI, and Deccan AI, specializing in data for AI model training and evaluations.[581] France's Capgemini acquired WNS in October 2025, a digital-led business transformation and services company, to enhance its AI offering for businesses.[582] However, Indian companies are also looking for investment opportunities in disruptive AI startups in Europe. For example, in 2026, HCLSoftware, an Indian-headquartered global enterprise software company, announced its intent to acquire Belgian AI Data Analyst Agents Startup Wobby for €4.5 million.[583] Infosys, an Indian IT company, committed €5 million for a minority stake in the German venture capital fund UVC Partners, which invests in deep-tech and AI companies.[584]

To tap into India's human capital, European firms are investing in India's AI skills base through programs tied to their own technologies and sectoral needs. Finnish telecommunications company Nokia has partnered with the Telecom Sector Skill Council to establish a center of excellence that offers certified training in futuristic, in-demand roles in 5G and IoT.[585] Capgemini, a French IT services and consulting company, has, together with NASSCOM Foundation, skilled more than 700 disadvantaged young people in India in areas including generative AI, robotics, and fintech.[586] Capgemini also launched a Noida Center of Excellence in Skilling offering advanced training in AI and robotics.[587]

South Korea: The memory-chip giant with deep European research ties

South Korea is both a close research partner of Europe and a leading supplier of the hardware on which AI depends. Research cooperation rests on the 2022 Digital Partnership and South Korea's association with Horizon Europe; France and Italy have named AI in their partnership agreements with Seoul, and Finland and Poland have set up AI cooperation with Korean ministries and institutes. At their June 2026 summit, the EU and South Korea also signed a Digital Trade Agreement and agreed to conclude a cooperation arrangement on AI.[588] Korean and European partners also work together on AI standards and on AI in healthcare. Semiconductor cooperation is particularly important, as Korean firms supply most of the memory chips AI hardware needs and, in turn, depend on European lithography machines. Investment flows in both directions, and telecoms companies from both sides are developing AI for future 6G networks.

President Lee Jae Myung placed AI at the center of national policy after taking office in 2025. In September 2025, he launched the National Artificial Intelligence Strategy Committee, which he chairs, to deliver about €61 billion in mostly private investment, as pledged in his campaign, to lift South Korea into the global top three.[589] South Korea was the second jurisdiction after the EU to adopt a comprehensive AI law, passing the Framework Act on AI (AI Basic Act) in December 2024, in force since January 2026. The law regulates a narrow class of high-impact systems in fields such as healthcare, energy and public decision-making.[590] Fines are capped at about €19,000, against up to €35 million or 7% of worldwide turnover under the EU AI Act, and the government has deferred fines for a year.[591] The Act is, above all, a promotion law, requiring the government to support AI training data and allowing it to fund AI data centers. South Korean firms are also preparing for the EU AI Act, and Samsung signed the EU's voluntary AI Pact in its first wave in September 2024. Samsung pledged an AI governance strategy, a map of its likely high-risk systems and AI literacy training for staff ahead of the Act's deadlines.[592]

South Korea's AI development is driven by the chaebol, large, family-controlled conglomerates whose vertical integration puts the same few groups at different points in the AI supply chain. Samsung and SK Hynix supply memory chips, their telecoms affiliates run networks and data centers, and in-house labs build models.[593] Seoul is also building sovereign AI supported by a program of about €320 million backing five consortia led by Naver Cloud, LG AI Research, SK Telecom, NC AI and Upstage to build foundation models. After the second evaluation in August 2026, only those led by LG, SK Telecom and Upstage remained.[594] Naver, LG and SK Telecom have already released LLMs fine-tuned for Korean language and culture, including Naver's HyperCLOVA X, LG's EXAONE and SK Telecom's A.X.[595] South Korea also leads the world in granted AI patents per head, with 14.3 per 100,000 inhabitants in 2024, ahead of Luxembourg at 12.3, China at 7.0 and the US at 4.7.[596] South Korea's strongest position is in hardware, since SK Hynix and Samsung together held about 83% of the high-bandwidth memory market in the second quarter of 2026, with the US firm Micron the only other supplier.[597]

The EU-Republic of Korea Digital Partnership, launched in November 2022, and South Korea's association with Horizon Europe institutionalize research cooperation.[598] The association was signed in July 2025, applied provisionally from January 2025, and the Korean science ministry expects it to focus on AI, quantum technology, and advanced bio.[599] Under the Digital Partnership, the Chips Joint Undertaking and South Korea's National Research Foundation co-funded four three-year projects worth about €12 million on energy-efficient AI semiconductors, brain-like chips and neuromorphic Lidar.[600] France's National Research Agency funds a joint call on AI for biotechnology, Sweden's VR funds a call on AI in the life sciences,[601] and the Austrian Science Fund supports a call for three-year projects on AI, quantum and biotech.[602] On the industrial side, Spain's Centre for the Development of Industrial Technology and the Korea Institute for

Advancement of Technology have opened a joint call for companies on AI and semiconductors, with Spanish budgets of €2.5 to €6 million per project.[603]

At their summit in Brussels on June 10, 2026, the EU and South Korea agreed to conclude an AI cooperation arrangement covering innovation, AI safety, and regulation, and signed a Digital Trade Agreement that prohibits data localization requirements and the forced transfer of source code.[604] France and South Korea upgraded their relationship to a Global Strategic Partnership at the Lee-Macron summit in Seoul in April 2026, naming AI, semiconductors, nuclear energy, hydrogen and space among the areas of cooperation.[605] During President Lee's state visit to Paris in September 2026, the two governments signed a memorandum on AI, semiconductors and quantum technology that provides for regular meetings, joint research and investment in each other's start-ups.[606]

At their January 2026 summit in Seoul, Italy and South Korea agreed to step up cooperation in AI, aerospace, semiconductors, and critical raw materials. During Lee's state visit to Rome in June 2026, they signed a science and technology memorandum that names AI first among its fields.[607] Finland and South Korea discussed AI, quantum and 6G at the ministerial level in May 2026.[608] In October 2025, the Korea Trade-Investment Promotion Agency and Poland's Ministry of Digital Affairs launched a Poland-Korea AI working group in Warsaw.[609] In January 2026, Poland's NASK and the Korea AI Safety Institute within South Korea's Electronics and Telecommunications Research Institute agreed to cooperate on AI safety testing and shared benchmarks, engineer training, and exchanges on implementing the EU AI Act and regulatory sandboxes.[610] In their joint statement in December 2023, the Netherlands and South Korea committed to developing international norms for military AI and co-hosting the 2024 Responsible AI in the Military Domain summit.[611] Germany's Cyber Valley in February 2024 and the Czech Artificial Intelligence Association in May 2026 signed memoranda with the Seoul AI Hub on start-up funding, joint research and market access.[612]

Naver Labs Europe, the Grenoble-based research arm of South Korea's Naver, was a founding member of two of France's four Interdisciplinary Institutes of Artificial Intelligence, the Multidisciplinary Institute for Artificial Intelligence in Grenoble and PRAIRIE in Paris.[613] Europe's standards body ETSI renewed its cooperation agreement with South Korea's TTA in March 2025, naming AI among five focus areas alongside cybersecurity, data and quantum.[614] South Korea's Lunit has embedded its breast-cancer screening AI in Belgium's Agfa HealthCare enterprise imaging platform under a partnership dating from 2021.[615] France's Sanofi, through its Korean subsidiary, and South Korea's Kakao Healthcare agreed in April 2026 to build AI models on real-world clinical data for early diagnosis of Fabry disease and personalized asthma care.[616] Italy's

ASML and the memory chokepoint

In March 2026, SK Hynix formalized a purchase of about €6.9 billion of extreme ultraviolet lithography systems from the Dutch manufacturer ASML, around 20 machines by analyst estimates, for delivery by the end of 2027 and the largest single order an ASML customer has publicly disclosed. The scanners will make the high-bandwidth memory and Dynamic Random-Access Memory (DRAM) at SK Hynix's Yongin and Cheongju fabs that AI training and inference depend on, and in September 2025 SK Hynix became the first memory maker to install a high numerical aperture (High-NA) extreme ultraviolet (EUV) system built for volume production, at its M16 fab in Icheon. Samsung and ASML agreed in December 2023 to invest about €710 million in a joint research lab at Hwaseong for next-generation (high-NA) EUV process development, but the site was reportedly abandoned in 2025. ASML is the only company that builds EUV machines, and SK Hynix and Samsung together supplied about 83% of the world's High Bandwidth Memory (HBM) in the second quarter of 2026, so each side's AI hardware depends on the other.

notified body ECM also helps South Korean AI-based diagnostic devices obtain CE certification under EU medical-device rules.[617] Germany's Friedrich Naumann Foundation works with South Korea's local e-government institute, the Korea Local Information Research & Development Institute (KLID), on making public services more citizen-friendly with AI.[618]

The largest deals between South Korea and Europe go through the Dutch lithography maker ASML, which builds the world's only commercial extreme ultraviolet machines and supplies them to SK Hynix and Samsung for memory chip production.[619]

Investment flows in both directions, and Samsung's Catalyst Fund has invested in the Dutch AI hardware provider Axelera AI.[620] Meanwhile, France's Naver-backed Korelya Capital invested in the South Korean AI inference-chip firm Rebellions.[621] Samsung and South Korea's Hanwha also took part in the €600 million Series B round of France's Mistral AI in June 2024.[622] France's Jolt Capital was selected to manage the AI investment mandate within South Korea's state-backed Global Fund 2025, overseeing an AI-focused fund of about €590 million.[623] Samsung's largest European acquisition since 2017 is the German cooling company FläktGroup, bought for €1.5 billion in 2025, which adds data center cooling to Samsung's air conditioning business.[624]

South Korea's LG bought 80% of the Dutch smart-home platform Athom in July 2024 to feed its generative AI home platform,[625] and Samsung operates AI skilling programs with universities in Italy and Portugal and a research institute in Poland.[626] In 2024, the Seoul-founded SafeAI, whose AI vision software detects fights, thefts and people falling, set up its European base in Luxembourg and began a proof of concept with the Luxembourg police.[627] South Korea's AI chip designer FuriosaAI opened its European flagship office in Lisbon in April 2026 as a hub for sales, support and research on compilers and chip design.[628] Naver Cloud and France's Mistral AI signed a comprehensive partnership in July 2026, to sell sovereign AI for manufacturing in Europe and Asia, with Mistral's models offered on the Naver Cloud Platform in Korea and Mistral engineers posted to Korean client sites. In April 2026, Mistral CEO Arthur Mensch visited Samsung's Hwaseong campus to discuss AI memory supply, but no agreement was reached.[629] In September 2026, Samsung led Mistral's €3 billion funding round at a €21 billion valuation, and the investment agreement was signed at the Élysée Palace during President Lee's state visit to France.[630]

In telecoms, South Korea's KT works with Nokia Bell Labs, the research arm of Finland's Nokia, on AI-based semantic communication for 6G under an agreement in early 2025.[631] SK Telecom signed a five-year memorandum with Sweden's Ericsson in March 2026 on AI-powered radio access networks that learn and predict channel conditions to raise energy efficiency and security,[632] and at Mobile World Congress 2025 it agreed with France's Schneider Electric to cooperate on mechanical, electrical and plumbing systems for AI data centers.[633] In August 2026, Ericsson was named the only global network technology company among the main partners of the SK Telecom-led Hyper-AI network demonstration project under Korea's science ministry, supplying Artificial Intelligence in the Radio Access Network (AI-RAN) pilot networks for demonstrations through 2027, with a planned deployment at KG Mobility's Pyeongtaek plant.[634] The EU-Korea 6GARROW project, a Horizon Europe project coordinated by France's Atomic Energy Commission (CEA), develops AI-native radio access networks with Yonsei University, Korea University, the Electronics and Telecommunications Research Institute and LG on the Korean side.[635]

Samsung Heavy Industries signed a joint development agreement with Lloyd's Register and the Greek shipowner Capital Clean Energy Carriers at Posidonia in June 2026 to design floating data centers for AI demand.[636] In July 2026, HD Korea Shipbuilding & Offshore Engineering (HD KSOE) and Schneider Electric also signed a memorandum to develop infrastructure for floating data centers, pairing Schneider's power and cooling systems with HD KSOE's offshore platforms.[637] Hyundai Motor tested its AI-driven demand-responsive bus service Shucle in a twelve-week pilot

in Gödöllő near Budapest from August to October 2025, its first deployment outside Korea, with routes created in real time from passenger requests instead of fixed lines.[638]

Japan: The AI-lly in governance, compute and robotics

Japan is one of the EU's closest partners on AI governance, sharing broad principles through the G7 Hiroshima AI Process and the Digital Partnership even though Japan's AI law is far lighter than the AI Act. Cooperation has increasingly moved into infrastructure, with SoftBank planning large AI data centers in France and Fujitsu supplying EuroHPC supercomputers in Spain and Portugal. In research, the two sides collaborate on Horizon Europe projects, the University of Tokyo runs a start-up accelerator with Germany's Cyber Valley, and Sony has opened an AI center in Barcelona. Japanese firms also work with European partners on AI-driven factory robots and on AI for regulated sectors such as finance and insurance. Japanese venture funds and corporate acquirers also invest in European AI start-ups.

Japan's government sees AI as a way to improve efficiency and address social challenges such as labor shortages, but acknowledges that domestic AI adoption, development, and investment have lagged. Japan's first AI Basic Plan, adopted in December 2025, seeks to accelerate adoption, strengthen development capabilities, and address the technology's risks.[639] The plan was drawn up under the AI Promotion Act of May 2025, which sets out guiding principles and relies on voluntary compliance.[640] The Act commits Japan to improving its AI research and development capabilities, promoting stakeholder initiatives, ensuring transparency about the risks AI poses, and playing a leading role in international cooperation.[641] Japan backs these goals with an AI and semiconductor investment framework that plans more than €56 billion in public support through fiscal 2030 and aims to mobilize over €280 billion in public and private investment over ten years.[642]

Unlike the EU's AI Act, Japan's AI Promotion Act provides the first framework for the technology, with more AI-related, specific laws to follow and drawing on existing regulations from other areas.[643] On AI safety, Japan relies on the Hiroshima AI Process, launched after the 2023 G7 summit in Japan and endorsed by G7 leaders, including the EU. The process provides the first comprehensive international framework for dialogue on safe, secure and trustworthy advanced AI,[644] promoting coordination among partners, transparency and shared AI governance principles. Japan describes the Hiroshima AI Process as its primary mechanism for international AI governance.[645]

Several Japanese companies have signed the voluntary pledges of the AI Pact, which the European Commission launched to prepare for the EU AI Act, including NTT Data, a subsidiary of the Japanese telecommunications group NTT, and NEC, one of Japan's five largest defense contractors. The AI Pact pledges cover AI governance, risk mitigation and the transparent labeling of AI-generated content such as deepfakes.[646]

Institutional cooperation on AI between Brussels and Tokyo stems from the EU-Japan Digital Partnership, established in 2022. Through the Partnership, both parties seek to "foster a safe, fair, inclusive and equal digital space and create a set of standards that can be used globally."[647] At their May 2026 meeting, the two sides committed to deepening AI collaboration in research and AI safety. Japan has also been associated with Horizon Europe, the EU's main funding program for research and innovation, since 2026, which widens opportunities for joint AI research.[648] Horizon Europe already funds joint AI projects with Japanese universities. In the Operationalizing AI Ethics for Learning and Practice (AIOLIA) project, Osaka University helps translate AI ethics principles into practical guidelines, and in the CoRDS(Confident Data-Driven Decision Support) doctoral network, Okayama University combines operations research and machine learning to build decision support tools.[649]

Japanese machines and European public supercomputers

Japan's part in the European AI buildup rests largely on Japanese companies that supply systems for European public supercomputers. Most notably, Fujitsu's subsidiary Fsas Technologies leads a consortium with Spain's Telefónica to upgrade Spain's MareNostrum 5 supercomputer. MareNostrum 5 is the most powerful supercomputer in Spain and belongs to the EuroHPC, the EU's public-private partnership for pooling resources to build European supercomputing.

In January 2026, EuroHPC signed a €129 million contract, financed equally by EuroHPC and by Spain, Portugal and Türkiye, for two new partitions with 1,344 Nvidia GB200 and 576 GB300 GPUs paired with Nvidia's Grace processors. The chips are American, and the Japanese contribution comes from the Fsas Technologies consortium, which installs them. The upgrade turns MareNostrum 5 into Spain's AI Factory, one of the first seven that EuroHPC selected in December 2024, mainly for training and operating LLMs for start-ups, small firms, public administrations and researchers. Nvidia lists climate modeling, health and biotech research, agriculture, energy and government services among its intended uses.

Fujitsu also supplied its PRIMEHPC supercomputer to Deucalion in Portugal, another EuroHPC system, which was inaugurated in September 2023.

At the member state level, Japan has deepened official AI ties with a growing number of EU countries. For example, in April 2026, French President Macron and Japanese Prime Minister Sanae Takaichi agreed to advance cooperation on advanced technologies such as AI and to launch a bilateral High-Level Dialogue on AI.[650] The first High-Level Dialogue on AI was held in June 2026 and brought together ministries, companies such as Japan's SoftBank and public agencies, including France's Inria.[651] In April 2026, Japan's Digital Agency signed a digital cooperation memorandum with Estonia that names AI as a cooperation area, and that same month Japan and Poland upgraded their relations to a comprehensive strategic partnership that includes cooperation on AI.[652]

EU-Japan AI cooperation is also taking concrete form in AI ecosystem infrastructure, as Japan's SoftBank plans to build 5 gigawatts of AI data center capacity in France, one of Europe's largest foreign investments in the sector. Across several projects, SoftBank will work with three French companies: the state utility EDF, the AI infrastructure firm Sesterce and the energy technology group Schneider Electric. The partners plan to build data centers on decommissioned power-plant sites and establish an industrial cluster in northern France that manufactures and integrates equipment for next-generation AI data centers.[653]

Research collaborations include a start-up accelerator program between the University of Tokyo and Germany's Cyber Valley, one of Europe's largest AI research collaborations, which the Max Planck Institute for Intelligent Systems co-founded. The program aims to link European AI and robotics technologies with Japan's industrial strengths and to connect start-ups and researchers from both sides.[654] In July 2025, Japan's RIKEN Center for Computational Science and the French CEA renewed a memorandum of understanding covering AI, high-performance computing and quantum technologies.[655] Research cooperation also involves companies. In 2024, Sony AI, a subsidiary of Japan's Sony Group, opened its first AI development center in the EU in Barcelona.[656] In 2024 and 2025, Sony also offered research awards to EU researchers working on AI to support collaborative research with the company.[657]

In commercial cooperation, Japan's NTT Data and France's Mistral AI formed a strategic partnership in 2025 to develop AI for regulated sectors such as finance, insurance and defense.[658] The partnership also covers AI-driven robotics; in 2024, the Japanese industrial automation

company OMRON and Germany's NEURA Robotics announced a strategic alliance to bring AI-driven cognitive robots into factory automation. The cognitive robots are designed to learn from their environment, make autonomous decisions and adapt to changing production.[659] Similarly, Japan's NEC and Siemens Digital Industries Software, the industrial software arm of Germany's Siemens, signed an agreement in 2025 to develop AI-driven robot teaching that streamlines robot motion planning and reduces setup time in manufacturing.[660]

Japanese venture capital funds, including NordicNinja, one of Europe's largest Japanese-backed venture funds, and SoftBank's Vision Fund, have invested around €1 billion in European AI start-ups.[661] Japanese companies also acquire European AI firms; in 2026, a subsidiary of the Japanese semiconductor maker Renesas Electronics acquired Greece's Irida Labs, which develops software for AI-powered visual perception.[662] Since 2020, Japanese companies have also acquired EU firms specializing in AI optimization for maritime transport, data and AI services, and AI-based image analysis.[663]

Canada: The scientific powerhouse and like-minded partner on AI governance

Building on a long tradition of scientific cooperation, Canada and the EU are deepening AI research through Canada's association with Horizon Europe, joint laboratories, researcher exchanges, joint calls and commercial R&D. Health and life sciences have emerged as a major area of AI collaboration. In response to growing European demand for sovereign and enterprise AI, Toronto-based Cohere is expanding its presence in Europe, including through its merger with Germany's Aleph Alpha, and partnering with European companies to explore AI applications for defense. Canada and European partners also engage in international AI diplomacy and governance, including through the Global Partnership on Artificial Intelligence (GPAI) and broader bilateral cooperation on AI safety and standards.

Canada is a global leader in AI research and talent development. The Canadian Institute for Advanced Research supported foundational research that contributed to the deep learning breakthroughs of the 2010s.[664] In 2017, Canada became the first country to launch a national AI strategy, prioritizing research excellence and talent development through three major AI institutes: Mila in Montreal, the Vector Institute in Toronto, and Amii in Edmonton.[665] However, despite its research achievements, Canada has struggled to commercialize innovations and retain intellectual property, with nearly half of its AI patents assigned to foreign entities in 2023, including companies such as Huawei.[666] Despite its vibrant startup ecosystem, Canada lacks the late-stage scale-up capital needed to grow companies into global champions, leading to "losing promising Canadian startups to foreign acquirers, along with their intellectual property and innovations."[667]

This commercial gap has left Canada without a dominant global platform developer. Its leading frontier-model company, Cohere, specializes in enterprise and sovereign AI, and remains far smaller than US giants such as OpenAI and Anthropic. Canada also trails European peers in model releases, counting 125 models through 2025 compared to the UK's 229.[668] Canada's domestic compute capacity remains modest, at 41 petaflops or 0.7% of global supercomputing performance in November 2023.[669] In December 2024, the Canadian government launched the Sovereign AI Compute Strategy backed by €1.24 billion to address the lack of domestic compute capacity.[670] Canada's policy focus has also shifted toward increasing adoption, scaling domestic companies, and strengthening technological sovereignty. In June 2026, the government updated its "AI for All" strategy to boost business adoption to 60% by 2034, generating €124.4 billion in economic output and creating 250,000 sector jobs.[671]

Canada still lacks a comprehensive federal AI law comparable to the EU AI Act, and the proposed AI and Data Act died with Bill C-27 in early 2025. Instead, Canada is regulating AI through existing privacy law and legislation, particularly the Personal Information Protection and Electronic Documents Act, alongside more targeted measures addressing specific risks and sectors.[672] Since May 2025, Canada has a Minister of Artificial Intelligence and Digital Innovation, whose portfolio covers the national AI strategy, AI infrastructure, adoption, and responsible development.[673] The Canadian Artificial Intelligence Safety Institute, launched in November 2024 with an initial €34 million over five years, conducts research and evaluations focused on risks from advanced AI systems and coordinates with counterpart institutions internationally.[674]

Canada has been active in AI diplomacy and is among five countries, together with France, Germany, Italy, and Japan, which have consistently endorsed every major global AI governance initiative between 2019 and 2025.[675] In 2020, Canada and France co-launched the GPAI to establish an international framework for operationalizing human-centric, trustworthy AI.[676] Now integrated with the Organization for Economic Co-operation and Development (OECD), the GPAI serves as a global policy laboratory where member states and state-nominated experts collaborate across critical domains such as data governance and commercial innovation.[677] In June 2026, the GPAI produced the OECD AI Policy Toolkit, a practical, interactive framework designed to help national governments map domestic ecosystems, diagnose legislative gaps, and coordinate regulatory efforts across international borders.[678]

Canada and the EU formally began cooperation on digital technologies through the EU-Canada Digital Dialogue, launched in 2019 under the broader Strategic Partnership Agreement. AI was already identified as a priority at the 2019 EU-Canada Summit, where both sides committed to deepening cooperation on AI while emphasizing shared democratic values, human rights, and responsible technological development.[679] The relationship was upgraded in 2023 with the EU-Canada Digital Partnership, which covers AI, semiconductors, quantum technologies, cybersecurity, data governance, and digital infrastructure.[680] The partnership's first council met in Montréal in December 2025, where Canada's AI minister Evan Solomon and Commission Executive Vice-President Henna Virkkunen signed an AI memorandum covering standards, skills, joint research, and adoption in industry.[681] The two sides pledged to expand AI-focused talent exchanges and share information on AI standards development and regulatory sandboxes between the Standards Council of Canada and the European Committee for Standardization (CEN) and the European Committee for Electrotechnical Standardization. Brussels and Ottawa also agreed to launch exploratory discussions on the possible future mutual recognition of conformity assessment results for AI-enabled products. The statement also aims to deepen bilateral engagement on AI Safety between the Canadian AI Safety Institute and the EU AI Office.[682] The cooperation is taking on practical form. Canada also participated in the EU Code of Practice process, initiated in 2024 as part of the AI Act implementation.[683]

Research cooperation deepened in 2024 through Canada's association with Horizon Europe.[684] This gives Canadian researchers access to European collaborative research calls, including in AI, semiconductors, high-performance computing and quantum technologies. Furthermore, European and Canadian universities and research institutes have longstanding, strong partnerships in AI. For example, in June 2026, Helmholtz Munich's Computational Health Center and Toronto's Vector Institute signed an agreement covering AI, researcher exchanges, and cooperation in precision medicine and biomedical discovery.[685] Mila has maintained a research partnership with France's Institut de Recherche Technologique Saint Exupéry since 2020, focused on reliable, certifiable AI for safety-critical applications in transport, aerospace, healthcare, and other complex systems.[686]

European companies have also engaged with Canadian research institutes. In Montréal, France's Thales established its cortAIx research hub in partnership with Mila, Canada's Institute for Data Valorization and the Vector Institute to develop trustworthy and explainable AI for safety-critical

Cohere and Aleph Alpha, a transatlantic sovereign champion

In April 2026, Cohere, the Toronto-based developer of enterprise and sovereign AI, and Aleph Alpha, a Heidelberg-based company offering sovereign AI solutions, announced a merger. The new business will continue under the Cohere name, with global headquarters in Toronto and European headquarters in Berlin, and is reportedly valued at roughly €17.1 billion. Cohere brings globally competitive enterprise foundation models, international customers and greater access to capital, while Aleph Alpha contributes strong relationships with European governments and regulated industries, expertise in sovereign AI solutions, and its PhariaAI platform. Aleph Alpha also holds multiyear framework agreements with German federal institutions, including BWI, the Bundeswehr's IT services provider.

This transatlantic venture aims to offer governments and enterprises an alternative to dependence on dominant US AI providers, particularly in sectors such as defense, finance, energy, manufacturing, telecommunications, and healthcare. Germany's Schwarz Group has committed €500 million to lead Cohere's next funding round, while its STACKIT sovereign cloud is expected to provide infrastructure for AI deployments in Europe.

applications in transport, defense and critical infrastructure.[687] The hub is intended to accelerate the transfer of academic research into industrial systems. German BASF is working with the University of Waterloo on AI-based forecasting, optimization and root cause analysis for industrial operations, while Siemens is establishing an AI manufacturing R&D center in Ontario focused on developing cutting-edge AI manufacturing technologies with an initial emphasis on battery and electric vehicles (EVs).[688]

Canada has also expanded bilateral AI cooperation with individual member states. Canada and Germany launched a Digital Alliance in 2025 and signed a joint AI declaration in 2026, focused on expanding compute infrastructure, accelerating AI research and commercialization, and talent development.[689] The two countries also launched a Sovereign Technology Alliance to reduce strategic dependencies in advanced technologies.[690] In 2021, the National Research Council of Canada and Germany's Federal Ministry of Education and Research supported six collaborative projects bringing together Canadian SMEs with German companies and research institutes to apply AI in manufacturing, photonics, infrastructure and automotive production.[691]

France has also been a longstanding AI partner for Canada. Bilateral cooperation began to take shape in 2018 around a shared commitment to human-centered and responsible AI, laying the groundwork for the above-mentioned GPAI.[692] In 2023, Canada and France created the Canada-France Joint Committee on Science, Technology and Innovation, which identified AI and quantum technologies among priority areas.[693] In support of this, the Natural Sciences and Engineering Research Council of Canada, together with Canada's federal Social Sciences and Humanities Research Council , and Montreal-based AI research consortium Institute for Data Valorization, partnered with the French National Research Agency for joint research funding to support joint projects on generative AI and on the security and safety of embedded AI systems.[694]

Alongside federal initiatives, France cultivates relations with Canadian provinces, particularly Quebec. In 2026, Quebec's Ministry of Cybersecurity and Digital Technologies signed a declaration of intent with France's interministerial digital directorate DINUM on digital sovereignty, including AI deployment in public administration and strategic digital infrastructure.[695] In June 2026, the Quebec government signed an exploratory collaboration agreement with Mistral AI, the French AI developer, focused on digital sovereignty, technological autonomy and the responsible deployment of AI in Quebec's public administration.[696] Mistral also announced it is opening its Canadian office in Montreal.[697]

Estonia also signed a statement of intent with Quebec on developing secure data exchange, digital identity, and AI.[698] Other member states have also formalized their AI cooperation with Canada. In 2024, Italy and Canada created a Joint Advisory Group on Artificial Intelligence, identifying areas such as health sciences, transportation and cybersecurity for research collaboration.[699] Finland and Spain signed a joint statement and an MoU on AI with Canada in 2026, covering compute, adoption and research, while Ireland is developing links between its AI Office and Canada's AI Safety Institute.[700] Poland's AI cooperation with Canada is tied more closely to defense,[701] and Latvia has begun developing research and industry links through AI-focused trade and innovation exchanges.[702]

Healthcare and life sciences have emerged as an important area of AI cooperation between Canada and Europe. Fonds de recherche du Québec Santé and France's Health Data Hub have jointly funded AI projects using health data in 2022 and 2023.[703] Sweden's national center for applied AI, AI Sweden, coordinates exchanges between Unity Health Toronto and three major Swedish university hospitals, focused on transferring and testing approaches for AI deployment in healthcare, including diagnostics, operational efficiency and clinical implementation.[704] In 2025, the government of Alberta committed €514 million over eight years to a partnership with Germany's Siemens Healthineers to modernize cancer care through imaging, oncology technologies, AI and machine learning, including a dedicated AI center of excellence.[705]

Most significant industry cooperation projects involve Cohere. The company opened an office in Paris in 2025, which serves as its central hub for Europe, the Middle East, and Africa.[706] It partnered with Germany's SAP to integrate Cohere's enterprise AI models and agentic platform, North, into SAP's EU AI Cloud and Business Technology Platform,[707] and in 2026 the two companies expanded the relationship to deliver sovereign AI solutions globally.[708]

Cohere is also increasingly involved in applications in Europe's defense sector. In March 2026, it signed an agreement with Saab, a Swedish aerospace and defense company, to explore integrating Cohere's AI into GlobalEye airborne early warning and control systems to support data-driven mission systems, maintenance, and real-time information processing.[709] Cohere's 2026 partnership with Spain's Indra Group, a major defense and aerospace company, entails integrating Cohere's models into IndraMind, a platform for protecting critical assets, and exploring AI applications for mission planning, analysis, and interoperability in multinational operations.[710] However, the most consequential connection between the European and Canadian industry ecosystems is the landmark transatlantic merger of Cohere and Aleph Alpha, announced in April 2026.

Canadian companies are increasingly expanding their operations and R&D activities in Europe. In 2026, OpenText, a Canadian software company, announced a €105 million investment in Cork and Galway in agentic AI, sovereign cloud and cybersecurity for European customers, creating 400 jobs in the largest Irish investment by a Canadian technology company.711 Montréal-based CGI, a multinational IT and business consulting company, established an AI Center of Excellence in Portugal in 2026 focused on generative and agentic AI.712 Toronto-based Brookfield Asset Management accounts for most of the roughly €32 billion that Canadian investors have announced for data centers in Europe.. In France, it announced €30 billion of investment in French AI infrastructure, notably through Data4, one of Europe's largest data center developers.713 In Sweden, Brookfield plans to invest up to €8.7 billion in AI infrastructure and has partnered with Telia, a Nordic telecom operator, to connect Brookfield's planned AI facilities to its national network and deliver key parts of its digital infrastructure.714 Brookfield is also part of a consortium together with Deutsche Telekom and Nvidia in a bid for one of the EU AI Gigafactories.[715]

Singapore: Europe's commercial and defense AI foothold in Southeast Asia

Singapore has emerged as the entry point for European AI business in Southeast Asia, and as a regional hub open to both American and Chinese companies. Cooperation with the EU rests on the 2023 Digital Partnership, which covers AI safety and possible exchanges on language models. Germany, France and Austria have also included AI in their bilateral agreements with the city-state. Research cooperation centers on Nanyang Technological University, which hosts joint AI laboratories with European companies. In business, Singaporean investors back European AI start-ups and data centers, and French firms such as Thales and Mistral work with Singapore's defense establishment. At the same time, Singapore's hedging between Washington and Beijing makes it an open but ambiguous partner.

In December 2025, Singapore signed the US-led Pax Silica Declaration on AI and the technology supply chain,[716] but it remains largely open to cooperation with China. Singapore has not joined the China-led WAICO but has been considering it as of September 2026.[717] This openness allows Singapore to host US and Chinese companies and their subsidiaries. In 2025, reports suggested that the Chinese AI developer DeepSeek had used Singapore-based subsidiaries to circumvent US export controls on advanced AI chips.[718] Manus, a Chinese AI start-up that relocated to Singapore, was to be acquired by the US company Meta for about €1.7 billion. China blocked the deal under its security review regime, the first public case of an AI acquisition blocked this way, suggesting Chinese influence can reach beyond its borders.[719]

Singapore's 2023 AI Strategy 2.0 seeks to build "a thriving AI ecosystem; develop our workforce to take on new opportunities; provide enough infrastructural capacity to achieve our ambitions; and foster a trusted environment that protects users and facilitates innovation."[720] The strategy also notes the need to "address risks from the potential abuse… of AI," including mismanagement.[721] However, unlike the EU, Singapore has no specific AI law. Singapore governs AI through voluntary frameworks, such as the 2024 Model AI Governance Framework for Generative AI[722] and, most recently, the January 2026 Model AI Governance Framework for Agentic AI, the first such framework worldwide. The agentic AI framework asks companies to introduce human oversight mechanisms that can override, intercept or review the actions of AI agents with real-world impact.[723] For binding rules, Singapore relies on existing laws such as the Personal Data Protection Act, under which the Personal Data Protection Commission issued guidelines on the use of personal data in AI systems in March 2024.[724] In January 2026, Singapore launched a National AI Research and Development Plan worth around €680 million for 2025 to 2030, to support fundamental and applied AI research and to attract talent.[725] Singapore has also developed national language models, such as the publicly funded Southeast Asian Languages in One Network (SEA-LION), which supports eleven Southeast Asian languages.[726]

AI cooperation between the EU and Singapore is primarily rooted in the EU-Singapore Digital Partnership, established in 2023. Under the Partnership, Singapore and the EU also agreed to explore future LLM exchanges between SEA-LION and the EU's ALT-EDIC.[727] In November 2024, the two sides signed an Administrative Arrangement on Collaboration on AI Safety, which links the EU AI Office with Singapore's AI Safety Institute on the safety of general-purpose AI models.[728] Among the member states, Germany and Singapore included AI in their November 2024 Strategic Partnership, committing to cooperate on AI security among other areas.[729] Austria and Singapore have also signed a memorandum of understanding on digital cooperation, including exchanges on AI, in October 2018.[730] In 2022, France and Singapore signed a Digital and Green Partnership, which lists AI among the emerging deep tech areas for future cooperation.[731]

Mistral AI in Singapore

France's Mistral AI works with Singapore's Ministry of Defence, the DSTA and DSO National Laboratories to develop generative AI augmenting the decision-making and sensemaking of the Singapore Armed Forces. In June 2026, the DSTA and Mistral extended the collaboration to AI agents that plan and execute multi-step tasks, to methods for evaluating and governing them, and to vision language models that let autonomous drones navigate from visual input and plain language instructions.

Research is a key channel of cooperation with the EU, with Nanyang Technological University (NTU) and the National University of Singapore among the most active partners. For example, the German automotive electronics company AUMOVIO operates a corporate AI lab with NTU focused on advanced driver assistance systems and automotive hardware.[732] Sweden's defense company Saab operates a joint industrial and academic laboratory with NTU that develops AI for air traffic management and remote tower control.[733] Germany's Schaeffler, a motion technology company, also has a corporate lab with NTU that develops AI-enabled humanoid, collaborative, mobile and assistive robotics.[734] In 2025, NTU and the Hungarian Research Network launched ten joint AI research projects under a bilateral joint call.[735] In March 2025, Singapore's National Supercomputing Center and Finland's IT Center for Science, which operates Europe's LUMI supercomputer, signed a memorandum to explore joint work on AI, the integration of high-performance and quantum computing, and digital twin technologies, with joint workshops, training and talent exchanges.[736]

Business cooperation between Europe and Singapore includes investment by Singaporean investors in European AI companies and data centers, and partnerships of European AI firms in Singapore. For example, Temasek, a Singaporean state-owned multinational investment firm and, effectively, its sovereign wealth fund, has backed German Black Forest Labs, which is developing the open FLUX model, and French Alan, a company that uses AI to personalize healthcare services.[737] DayOne, a Singapore-based data center operator formerly the international unit of the Chinese firm GDS, has also invested €1.2 billion to build a 128-megawatt campus in Finland.[738] DayOne has been independent of GDS since 2025, but GDS retains a minority stake, and its founder sits on the board, having previously served as chair.[739] France's Mistral AI has also established at least six business partnerships in Singapore. These range from cooperation with private companies such as RE:AI, an AI cloud business part of Singtel, a Singaporean telecommunications conglomerate, to public institutions and ministries, including defense.[740]

France's Thales, an aerospace and defense company, works on AI projects with private- and public-sector partners, including the Civil Aviation Authority of Singapore, and on defense projects with the Ministry of Defense's DSTA.[741] Thales also supplies its AI-powered Pathmaster system to the Republic of Singapore Navy for target detection and identification.[742] In April 2023, the French and Singaporean defense ministries agreed to establish a joint research laboratory for AI in defense applications. The laboratory brings together the French National Center for Scientific Research and Temasek Laboratories at the National University of Singapore as lead research agencies, and draws on wider networks of universities, research institutes and industry in both countries.[743] Italy is also involved in AI defense cooperation with Singapore, since the DSTA partnered with the Italian defense electronics company ELT Group in June 2025 to apply AI and machine learning to Singapore's electromagnetic spectrum operations.[744]

Taiwan: The silicon spine of AI cooperation

Taiwan's importance to Europe's AI ecosystem rests primarily on its dominance in advanced semiconductors, AI servers and other AI-related infrastructure components, but cooperation is increasingly extending into chip design, edge AI, telecommunications, data-center systems and industrial applications. Cooperation is strongest with France, Germany, and several Central and Eastern European countries, while further expansion is constrained by fragmented European demand, high costs, regulatory complexity, and the limited formalization of EU–Taiwan relations.

According to Jensen Huang, Nvidia's Taiwan-born CEO, "Taiwan is the epicenter of the AI revolution."[745] The island holds a dominant, arguably indispensable, position in manufacturing the hardware on which cutting-edge AI systems depend. Taiwan produces more than 90% of the world's most advanced semiconductors, most of them made by TSMC, including the chips used to power AI. Furthermore, Taiwanese companies such as Foxconn, Quanta, and Wistron manufacture nearly 90% of the global supply of AI servers.[746]

Besides hardware, Taiwan is now seeking to establish itself as a global "hub for AI innovation."[747] Its AI Action Plan 2.0 (2023-2026) funds training programs, research centers, and commercial and public-sector applications, and aims to grow Taiwan's AI industry to more than €7.5 billion by 2026. The plan builds on AI Action Plan 1.0, implemented between 2018 and 2021, which reportedly increased corporate AI adoption to 48.7%. "In July 2025, Taiwan unveiled the "Ten Major AI Infrastructure Projects" initiative, which targets the creation of 500,000 jobs and the establishment of three international-level research laboratories.[748] In August 2026, Taiwan's government set the largest-ever technology budget for 2027 to secure sovereign AI computing capability and build basic AI infrastructure.[749]

The rapid expansion of AI and semiconductor production nonetheless presents substantial energy security challenges. Taipower estimates that additional electricity demand from the semiconductor and AI-related industries will exceed five gigawatts between 2026 and 2030.[750] Energy constraints in Taiwan could slow the expansion of advanced-node capacity and raise production costs or delay deliveries, even without geopolitical disruption. European economic security policy should therefore treat Taiwan's electricity system as part of its semiconductor supply chain resilience, including by incorporating indicators such as reserve margins, LNG stocks and grid connection constraints into supply risk monitoring and by expanding EU-Taiwan cooperation on energy resilience.[751]

Taiwan's National Artificial Intelligence Basic Act, enacted in January 2026, lays the foundation for the country's emerging AI regulatory framework and sets a two-year period to review and adapt existing legislation to align with its provisions.[752] The law designates the National Science and Technology Council as the central competent authority and establishes seven principles for AI development and use, covering sustainability and well-being, human autonomy, privacy and data governance, cyber security and safety, transparency and explainability, fairness and non-discrimination, and accountability. In May 2026, the Executive Yuan established a National AI Strategy Special Committee, chaired by Premier Cho Jung-tai, to coordinate national AI policy across government agencies.[753]

Compared with the EU's AI Act, which establishes a detailed enforcement regime, the Taiwanese legislation delegates much of the regulatory architecture to subsequent rulemaking. The Ministry of Digital Affairs must develop an AI risk classification framework aligned with international standards and help sectoral authorities develop risk-based regulation. The Ministry has since published an AI Risk Taxonomy and Assessment Framework, but the relevant sectoral authorities remain responsible for translating it into legally binding, directly enforceable rules.[754] For high-risk AI applications, the Basic Act requires the government to clarify liability and attribution

conditions and establish mechanisms for remedies, compensation or insurance. AI products or systems classified as high risk must also carry appropriate notices or warnings. The detailed regulatory obligations for individual sectors therefore depend on further rules adopted by the relevant authorities. Existing legislation, including Taiwan's Personal Data Protection Act, adds another layer of regulation for the collection, processing, and use of personal data.[755]

Taiwan's approach to AI is also shaped by national-security concerns. Because Taiwan and China share a language, Taiwanese policymakers regard the island as particularly exposed to Chinese-developed digital platforms and AI systems. As a result, Taiwan has supported developing sovereign Traditional Chinese-language models. These include the government-backed Trustworthy AI Dialogue Engine (TAIDE), developed under the National Science and Technology Council, and Foxconn's 70-billion-parameter FoxBrain, both framed explicitly as a domestic alternative to DeepSeek and other China-based chatbots.[756] Taiwan has also prohibited government agencies, public schools, and state-owned enterprises from using DeepSeek, citing risks to information security and national security.[757]

Cooperation between Brussels and Taipei remains constrained by the EU's One China policy, under which the EU recognizes the government of the People's Republic of China as the government of China and does not maintain formal diplomatic relations with Taiwan, which limits the scope and formalization of official engagement. Practical cooperation has nevertheless expanded in areas such as trade, technology and supply chain resilience. In 2019, the European Commission and Taiwan launched an ICT dialogue, already identifying opportunities for cooperation in research, development, and AI. After a six-year hiatus, the dialogue resumed in 2026 and covered semiconductors, AI policy, digital-platform regulation, data governance, submarine cables, cybersecurity, 5G/6G, digital skills, and audiovisual policy. The European Commission and the EU-funded Chips Diplomacy Support Initiative (CHIPDIPLO) consortium have supported industry-level engagement through a Europe–Taiwan semiconductor dialogue at SEMICON Europa in Munich (November 2025) and SEMICON Taiwan (August 2026).

However, EU-Taiwan cooperation extends beyond industry and research cooperation into regulatory dialogue and governance. Taiwan also participated as an international partner in the EU-funded INSTAR initiative on digital standardization, which also covered artificial intelligence.[758] Taiwan's Intellectual Property Office and the European Economic and Trade Office jointly organized a seminar on generative AI and copyright in March 2025, involving Aleph Alpha and Taiwan's TAIDE project, and covering the EU AI Act, copyright rules for training data, and practical GenAI governance issues.[759]

Taiwan has also developed bilateral frameworks to deepen cooperation in AI and other emerging technologies with individual member states. In 2023, it concluded Science and Technology pacts with France and Germany, both of which mentioned AI as a priority area for cooperation.[760] In May 2025, France and Taiwan announced a bilateral innovation and R&D cooperation program, with government funding from Taiwan's Industrial Development Administration and the Department of Industrial Technology within the Ministry of Economic Affairs, and loan support from the French public investment bank Bpifrance.[761] The first joint call approved six projects covering AI, high-performance computing, silicon photonics, advanced displays and biomedical applications, with about €35 million in combined R&D investment. The 2026 call again lists AI and semiconductors as priority fields.[762]

Germany and Taiwan signed the agreement in Taipei during a visit by Germany's Federal Minister of Education and Research, Bettina Stark-Watzinger, who became the first German minister to visit Taiwan in 26 years. Under the agreement, the two sides pledged to enhance cooperation in AI applications, semiconductors, and IC design.[763] In April 2024, Taiwan received a delegation from the German Federal Ministry of Education and Research, which included representatives of the DFKI.[764] This was followed by a bilateral AI seminar in Berlin in September focused on

generative AI, LLMs, and edge AI.[765] At this occasion, Taiwan's AI Center of Excellence, and DFKI signed an MoU establishing a framework for joint research projects, researcher exchanges, workshops and a shared research agenda. Initial areas identified for cooperation included LLMs for cyber-physical systems, explainable and trustworthy generative AI, AI and robotics for agriculture, and AI for Industry 4.0 and semiconductor manufacturing.[766] German and Taiwanese governments have subsequently created a bilateral funding mechanism for AI research.[767] Additionally, a separate 2026–2029 program supports joint work on advanced chip design, including chips for edge AI.[768] The Fraunhofer Institute for Photonic Microsystems, together with the Fraunhofer Institute for Microstructure of Materials and Systems and Taiwan's Semiconductor Research Institute, is jointly developing memory chips for more energy-efficient AI.[769] In 2025, the Technical University of Munich established the MACHT-AI research and training center in partnership with TSMC to develop energy-efficient AI chips and train researchers in advanced semiconductor technologies.[770]

Cooperation has also been particularly visible with some Central and Eastern European countries, where strong political ties with Taiwan have helped create space for engagement in emerging technologies, particularly with Czechia. AI has featured prominently on the agenda since Czech Senate Speaker Miloš Vystrčil's landmark 2020 visit. During the visit, the Taiwan–Czech Republic Economic, Trade and Investment Forum focused on three broad areas: the IoT and artificial intelligence;[771] Taiwan's Asia Silicon Valley Development Agency; and the Czech Agency of Science and Technology Advanced Region signed an MoU on smart city and Artificial Intelligence of Things exchange.[772] AI was again among the priority sectors of the large business delegation accompanying Chamber of Deputies Speaker Markéta Pekarová Adamová to Taiwan in 2023.[773] In late 2024, Taiwan opened a Trade and Investment Service Center in Prague to support Taiwanese companies entering the Czech market.[774] During a December 2025 visit to Prague, Minister of Economic Affairs Kung Ming-hsin proposed deepening bilateral cooperation in artificial intelligence, drone and space technology, electric vehicles, electron microscopy, and lasers.[775] However, the relationship has cooled under Prime Minister Andrej Babiš's government, which took office in December 2025.

The favorable political environment has produced its most tangible results in semiconductors, with spillovers to AI. Taiwan is financing three semiconductor-related centers in Czechia: the Supply Chain Resilience Center at Charles University, established with National Chengchi University in 2023; a joint research center between the Taiwan Semiconductor Research Institute and Czech Technical University in Prague, established in 2025; and the Advanced Chip Design and Research Center in Brno, which was conceived as a joint project among Taiwan's National Institute of Applied Research, the Czech CyberSecurity Hub, and Czech universities and included, for example, the Artificial Intelligence on Chip workshop.[776] According to its director, Jiří Háze, the design center in Brno was crucial in attracting Taiwanese firms to Czechia. In April 2026, Taiwanese company Jmem Tek, which provides semiconductor security solutions for artificial intelligence, defense applications, and critical infrastructure, opened its first European office in Prague and is setting up a chip security center in Brno.[777]

In 2022, Poland's IDEAS NCBR, a research and development center established by the National Center for Research and Development, and National Taiwan University's Center for Artificial Intelligence and Advanced Robotics established a five-year framework for joint research, exchanges and grant applications.[778] In June 2026, Taiwan's Ministry of Economic Affairs and Poland's National Center for Research and Development created a bilateral industrial research and development platform, with artificial intelligence and semiconductors among the priority areas and a first joint call planned for 2027.[779] As part of Taiwan and Poland's paradiplomacy engagement, the Pomeranian Development Agency and the Taiwan–Poland Chamber of Commerce also signed an MoU in July 2026 on a Taiwan–Poland Artificial Intelligence and Robotics Alliance to promote cooperation in artificial intelligence, robotics, and related investment.[780]

Taiwan's ties extend beyond Central and Eastern Europe. Portugal's Institute for Systems and Computer Engineering, Technology and Science signed a cooperation agreement with Taiwan's National Applied Research Laboratories in early 2024 covering high-performance computing, microfabrication and microelectronics, artificial intelligence and data science.[781]

Major Taiwanese suppliers of AI servers are increasingly localizing parts of the server manufacturing, system integration and data center infrastructure value chain within the EU. Since 2022, Foxconn's Kutná Hora operations have supported Hewlett Packard Enterprise's European production of liquid-cooled high-performance computing and AI systems.[782] In 2026, Foxconn partnered with France's Bull to manufacture next-generation AI and cloud infrastructure for AI factories and cloud providers.[783] Foxconn is also working with France's Schneider Electric to develop integrated AI data center solutions that combine Foxconn's advanced compute platforms and AI rack integration with Schneider's power, cooling, and energy management technologies.[784] Other Taiwanese server manufacturers have also established substantial production capacity in Czechia. Wistron operates what it describes as the largest server production facility in Central Europe in Brno, providing a European manufacturing base for a company that is also a major global producer of AI server infrastructure.[785] Inventec, another major global supplier of AI and edge computing systems, opened a 52,000-square-meter facility at Blučina near Brno in 2025 to consolidate its European manufacturing, producing servers, information technology products and specialized electronics for the European market.[786]

Cooperation also increasingly extends into AI-infrastructure design, engineering and systems integration. Since 2020, the Taiwanese server maker GIGABYTE has agreed to supply HPC servers for Germany's Northern Data's data centers in the Nordic countries.[787] Since June 2026, Northern Data has been majority-owned by the US-listed video platform Rumble.[788] France's Dassault Systèmes and Taiwan's Quanta Cloud Technology are pursuing a complementary model, combining Taiwanese AI-server expertise with European virtual-twin and simulation technologies to design and optimize AI factories before physical deployment.[789]

European companies such as ASML, Air Liquide, and Merck are deeply embedded in Taiwan's global semiconductor ecosystem, supplying technologies and materials essential to advanced chip production.[790] The European Semiconductor Manufacturing Company (ESMC), TSMC's European joint venture with Bosch, Infineon and NXP, is currently designed for mature and specialty nodes rather than leading-edge AI processors. Nevertheless, its establishment creates a potential platform for future expansion if European demand for advanced logic chips reaches sufficient scale. For now, however, TSMC's current European strategy remains focused on automotive and industrial applications.[791]

Companies on both sides are also increasingly cooperating on AI integration, particularly in semiconductor design and edge AI. Germany's Siemens and TSMC are integrating AI-powered automation into advanced semiconductor design workflows.[792] In the Netherlands, Axelera AI has partnered with Taiwan's Andes Technology to integrate Taiwanese RISC-V processor technology into its next-generation AI processing platform, and Taiwan's Advantech is working with Axelera to develop edge-AI acceleration modules for applications ranging from industrial automation and robotics to smart cities and medical imaging.[793] Taiwan's ASUS IoT, ASUS's industrial IoT and edge computing division, is working with Polish software company CTHINGS.CO, which develops platforms for managing connected devices, cloud infrastructure and edge AI, to deploy AI-enabled industrial systems in factories and other distributed environments.[794]

Taiwan's Global Unichip Corporation is working with French AI chip developer VSORA on Jotunn8, a data center processor designed for AI inference, with Global Unichip providing chip implementation and packaging expertise.[795] Taiwan's Powerchip Semiconductor Manufacturing Corporation has likewise partnered with France's CEA-Leti and CEA-List to develop more energy-efficient computing architectures for next-generation AI, combining Taiwanese chip integration

Foxconn–Bull: localizing AI infrastructure in Europe

In June 2026, Taiwan's Foxconn and France's Bull announced a partnership to manufacture next-generation AI and cloud computing systems in Europe. Foxconn is one of the world's largest electronics manufacturers and a major producer of AI servers and rack-scale computing systems, while Bull is a French supercomputing company with expertise in high-performance computing and system integration.

Under the partnership, Foxconn manufactures and conducts initial testing of the systems at its Pardubice, Czechia, facilities, while Bull performs final assembly, integration, and validation at its Angers, France, site. The systems are intended for European AI factories, cloud providers and other operators requiring large-scale computing capacity for AI training and inference. The first platform announced under the partnership uses Nvidia's Vera Rubin NVL72 architecture and integrates advanced processors, high-bandwidth memory, networking and storage into rack-scale systems.

capabilities with French expertise in RISC-V processor design and silicon photonics.[796] These partnerships illustrate a broader shift toward customized AI chips and closer collaboration between semiconductor companies and industrial users.

European telecom equipment companies are increasingly working with Taiwanese operators to deploy AI in mobile networks, particularly for network optimization, automation and preparation for 6G. Sweden's Ericsson has partnered with Chunghwa Telecom on AI-enabled digital twins, congestion prediction and network automation, including a system used to manage traffic surges during major events, and in 2026 the companies expanded cooperation into 5G Advanced and AI intelligent networks.[797] Finland's Nokia is pursuing similar cooperation with both Chunghwa Telecom and Taiwan Mobile, covering AI-enabled radio access networks, predictive maintenance, energy management and real-time network optimization, with the aim of making mobile infrastructure more autonomous and efficient.[798]

Taiwanese engagement is also growing through targeted investments in emerging tech and AI, with Central and Eastern Europe emerging as the main destination, mainly through the Taiwania Capital, venture-capital firm established with backing from Taiwan's National Development Fund, which in 2022 launched a €180 million fund targeting Central and Eastern Europe, including AI among its priority sectors. Taiwania Capital invested €3.5 million in the Lithuanian medical imaging company Oxipit, which develops AI tools for analyzing chest X-rays,[799] and also invested in Slovak warehouse robotics group Photoneo Brightpick,[800] Croatia's All Eyes On Screens, which provides AI-based advertising analytics;[801] Czechia's Supernova, which develops software tools for design and coding workflows;[802] and Estonia's Skeleton Technologies, which produces energy storage systems for data centers and other high-power applications.[803] Taiwanese corporate investors are also targeting European companies with strategically complementary AI capabilities. Taiwan's Delta Electronics invested about €10 million in Germany's NEURA Robotics and later deepened cooperation in AI-powered robotics, collaborative robots, and smart manufacturing.[804]

Taiwan's growing centrality to global AI infrastructure is creating opportunities for deeper cooperation in chip design, AI servers, data centers and specialized industrial applications. At the same time, Europe remains a harder market for Taiwanese companies than the US or Japan because of regulatory fragmentation, high energy costs, bureaucratic complexity, and weaker, less predictable demand for AI chips and infrastructure.[805]

Malaysia: The growing data center market for Europe's AI suppliers

Malaysia is mainly a market for European AI suppliers, with little joint AI development. Its rise as Southeast Asia's leading data center hub, centered in Johor across the border from Singapore, is attracting European firms that supply renewable power, network equipment, and AI skills training. At the same time, the EU and Malaysia are negotiating a free trade agreement expected to cover digital trade. In semiconductors and manufacturing, European companies such as Germany's Infineon and Siemens build on their existing plants and partnerships in Malaysia. Research links remain limited to a few Horizon Europe and academic projects. The relationship is asymmetric: Malaysia draws on European technology and capital, while Europe relies on Malaysia mainly for chip assembly, testing, and power semiconductors rather than AI capability.

Malaysia is a fast-rising AI market, using cheap land and energy and its position next to Singapore to become Southeast Asia's leading data center hub.[806] In 2024, Malaysia attracted about €22.4 billion in announced data center investment from US companies Microsoft, Amazon, Google, and Oracle[807] and launched its National Semiconductor Strategy with about €4.9 billion in fiscal support.[808] Kuala Lumpur opened a National AI Office in December 2024, to shape policy and regulation,[809] and turned it into a permanent corporation under the Ministry of Digital, AI Malaysia, in July 2026.[810] It aimed to place Malaysia in the top twenty of global AI readiness rankings by 2030.[811] In July 2025, Malaysia began requiring strategic-trade permits for US-origin AI chips, under American pressure to stop their diversion to China.[812]

Malaysia's National AI Roadmap for 2021 to 2025 set out eleven national AI use cases across five priority sectors: agriculture and forestry, medicine and healthcare, smart cities and transport, education, and public services.[813] Malaysia launched its National AI Action Plan for 2026 to 2030 in July 2026, aiming to expand AI literacy and digital trust, increase investment in AI development, support AI applications, and develop data centers and related infrastructure. The plan also established the Malaysia AI Safety Institute to strengthen national capabilities to assess and manage AI risks.[814] The National Guidelines on AI Governance and Ethics of September 2024 set out seven voluntary principles covering fairness, safety, privacy, inclusiveness, transparency, accountability and human benefit.[815]

Malaysia's first AI Governance Bill was expected to reach the Cabinet in June 2026,[816] but that target passed, and the bill went to public consultation instead. The National AI Office held engagement sessions through July 2026, and it now aims to table the bill in the first quarter of 2027 at the latest.[817] The consultation paper proposes a risk-based scheme with three tiers, unacceptable, high, and low risk, with obligations tailored by system class and sector.[818] Malaysia used its 2025 ASEAN chairmanship to establish an ASEAN AI Safety Network, adopted by declaration at the 47th ASEAN Summit in Kuala Lumpur in October 2025 to strengthen regional AI governance and support AI safety research.[819]

Malaysia's data center build-out is concentrated in Johor, across the causeway from Singapore. Singapore stopped approving new data centers in 2019 because of limited land and electricity, and lifted the pause in 2022 under a selective regime tied to efficiency and renewable power.[820] The three-year pause pushed hyperscaler expansion across the border into Johor, where land is more available and electricity cheaper, and Johor's share of Malaysia's operational data center capacity grew from almost nothing in 2020 to about 80% in 2024.[821] Water availability has, however, become a constraint, and in November 2025 Johor stopped approving high-water-consumption data center types and those using evaporative cooling.[822] Malaysia is also connected by more than twenty international submarine cables with low-latency links to Singapore's cable hub.[823]

TotalEnergies, Google and the Malaysian grid

In December 2025, the French energy group TotalEnergies signed a 21-year power purchase agreement to supply Google's data center operations in Malaysia with certified renewable electricity, about one terawatt hour, equivalent to 20 megawatts, from the Citra Energies solar plant at Kulim in Kedah, a 30-megawatt project whose full output of roughly 1.5 terawatt hours is contracted under 21-year agreements. TotalEnergies holds 49% of the plant and the Malaysian developer MK Land 51%. Malaysia's Energy Commission awarded it to them in August 2023 under the Corporate Green Power Program, and financial close on a loan of about €32 million arranged by BNP Paribas followed in May 2026, with operations due in the third quarter of 2027.

European engagement with Malaysia is modest and, unlike with most partners, is led by European companies operating in Malaysia, which supply infrastructure upgrades and training. Malaysia offers European companies a fast-growing data center market, a manufacturing and semiconductor assembly base, and an export market for infrastructure providers and industrial software. European training efforts in Malaysia are small compared with those of US companies, since Ericsson set out to train 40,000 people, while Microsoft alone set out in December 2024 to give 800,000 Malaysians AI skills by the end of 2025 and reported training more than 734,000 by October 2025.[824]

Malaysia ratified its Partnership and Cooperation Agreement with the EU, signed in December 2022 and covering science, technology and digitalization, in May 2026, and the agreement enters into force once the remaining member states have ratified it.[825] The EU and Malaysia relaunched free trade negotiations in January 2025 and had concluded five chapters by June 2026, on transparency, small firms, customs, trade remedies and regulatory practice. The digital trade chapter, expected to cover cross-border data flows and source-code protection, remains open, and both sides aim to conclude the text in 2027.[826]

European companies are taking part in Malaysia's AI build-out mainly as suppliers of renewable power, network equipment, and skills training. France's TotalEnergies signed a 21-year renewable power agreement in December 2025 to supply Google's data center operations in Malaysia,[827] Finland's Nokia is upgrading and securing six AI data centers run by the local operator Open DC in Cyberjaya, Johor Bahru, Penang and Kedah,[828] and Sweden's Ericsson supplies the AI-based operations of the national 5G network with Digital Nasional Berhad and with it, began to train 40,000 municipal and government employees in 5G, AI and IoT in September 2025.[829] Malaysia's second 5G network, which the operator U Mobile began building in 2025, uses equipment from China's Huawei and ZTE instead.[830]

In semiconductors and smart manufacturing, cooperation rests on large European companies' operations. Germany's Infineon opened an innovation launchpad with Universiti Teknologi Malaysia in December 2025 for research and training in AI, semiconductors and power electronics.[831] In November 2025, Germany's Siemens signed a memorandum with the Federation of Malaysian Manufacturers to support its 3,000 Smart Factories initiative with readiness assessments and training.[832] France's Schneider Electric said in May 2026 that it planned to open a Southeast Asia training center in Malaysia that year to give semiconductor firms and other partners technical skills in energy management and data center equipment, as AI infrastructure drives up power demand in the region.[833]

European chip activity in Malaysia focuses on power semiconductors and packaging rather than the most advanced logic chips, with Infineon's Kulim fab producing silicon carbide power chips and Austria's AT&S building substrates for AI processors.[834]

Research links between European and Malaysian institutions remain few and recent. Universiti Putra Malaysia and the Fire and Rescue Academy of Malaysia joined a Horizon Europe staff exchange project on AI-driven fire risk assessment for electric vehicles in buildings as associated partners from January 2026, alongside institutions from Spain, Slovenia and the UK.[835] Multimedia University also works with La Rochelle Université on small-object detection in aerial images under a France-Malaysia joint research program.[836]

In contrast, Malaysia's drone and data company Aerodyne Group has built a European presence. In February 2023, Aerodyne made a strategic investment in the Rome-based Aiviewgroup, which combines drone operations with AI-powered analytics for infrastructure inspection.[837] In January 2021, its UK-registered European arm signed a partnership agreement with German IT consultancy QUANTO AG and the technology firm Taku International to roll out its AI-based asset management platform across Germany, Austria and Switzerland.[838]

United Arab Emirates: The sovereign investor financing Europe's AI ambitions

The UAE engages with Europe primarily as a sovereign investor, channeling state capital into data centers and computing capacity, and European firms provide the technology and expertise. Its largest commitments are concentrated in France and Italy, and bilateral memoranda have extended AI cooperation to several smaller member states. Emirati technology groups such as G42 and Core42 have also built direct partnerships with European companies in computing, model development and financial services, whereas research cooperation remains secondary. Because the UAE maintains close technological ties with both the US and China, European governments must ensure that the data centers they finance remain under European operational control and that the data they host is safeguarded against access by third countries.

The UAE has made AI the centerpiece of its post-oil economy, as set out in its National AI Strategy 2031 and symbolized by its October 2017 appointment of the world's first minister for artificial intelligence.[839] It aims for AI to contribute 20% of non-oil GDP by 2031 and uses sovereign wealth to reach that target.[840] Its main vehicles are the MGX investment fund, set up in March 2024 with a target of about €92 billion in assets, and the national champions G42 with its cloud subsidiary Core42.[841]

The UAE has built its own LLMs, the Falcon family of open models from the Technology Innovation Institute and G42's Arabic-English Jais.[842] It also founded the Mohamed bin Zayed University of Artificial Intelligence (MBZUAI) in 2019 as the world's first graduate-level university dedicated to AI.[843] MBZUAI operates a laboratory in Paris as part of its Institute of Foundation Models, launched in May 2025,[844] and signed a research agreement with France's École Polytechnique in May 2025 covering LLMs, reasoning models and AI in biology, health and safety.[845] MBZUAI also has documented institutional ties to China. Beijing named its president, Eric Xing, a Zhongguancun Overseas Strategic Scientist in 2017, and founding board member Andrew Chi-Chih Yao holds the Chinese Government Friendship Award. In 2023, the university signed a five-year research agreement with Beijing Infinite Brain Technology and partnered with BioMap, the company founded by Robin Li of the Chinese search group Baidu. Huawei has provided GPU computing services to researchers affiliated with MBZUAI, and the campus has access to more than 800 Nvidia GPUs, including chips the US banned from export to China in October 2022. MBZUAI therefore combines access to advanced US chips with links to Chinese state programs and companies.[846]

The UAE has no AI law, and in June 2024 it issued a non-binding Charter for the Development and Use of Artificial Intelligence with twelve ethical principles. General data protection and cybercrime

The Paris campus, Emirati capital on French soil

On February 6, 2025, four days before the Paris AI Action Summit, France and the UAE signed a framework agreement on AI covering investment in both countries, the purchase of advanced chips, data centers, talent and virtual data embassies. In parallel, they agreed on a one-gigawatt AI campus in France that the Élysée valued at €30 to €50 billion. The framework was built on a memorandum signed on May 22, 2024, between France's economy ministry and the Abu Dhabi Artificial Intelligence and Advanced Technology Council. The first investment tranche followed at the Choose France summit on May 19, 2025, when MGX joined the French public investment bank Bpifrance, Mistral AI and the American chipmaker Nvidia in a joint venture to build what the partners call Europe's largest AI campus, in the Paris region. The campus is planned to reach up to 1.4 gigawatts, with a reported cost of €8.5 billion, and will include exascale-class computing and sovereign cloud integration. At Choose France a year later, in June 2026, the partners announced they would select a second site beyond the first campus at Fouju in Seine-et-Marne and raised the national target to 3 gigawatts. The project combines Emirati capital, American chips, a French model developer, and a French state investment bank, so the site and model are European, while the financing and hardware come from outside the EU.

laws also apply to AI systems, and AI-specific guidelines exist for financial institutions and, in Dubai, for the healthcare sector.[847] In April 2025, the Cabinet approved an AI-based legislative system, which it calls the world's first of its kind, to accelerate lawmaking by up to 70%.[848] AI became a compulsory subject in government schools from kindergarten to grade twelve in the 2025-26 academic year.[849] In June 2026, the UAE merged its AI Office and data and digital government bodies into a Federal Authority for Artificial Intelligence and Data, which reports to the Cabinet and can propose legislation.[850]

The recent increase in EU-UAE cooperation may also reflect Washington's increasingly tighter control over advanced AI hardware and software in recent years and months. G42, the developer of Jais, sold its stakes in the Chinese companies ByteDance, xFusion, and Honor in November 2023 and removed Huawei equipment from its facilities to secure its US partnerships, but the stakes were reportedly transferred to Lunate, a new Abu Dhabi investment vehicle, in July 2024.[851]

At the EU level, the two sides opened negotiations in December 2025 on a Strategic Partnership Agreement that names AI among its areas, alongside free trade talks covering digital trade, which both sides aim to conclude in 2026.[852] Relations between EU member states and the UAE are driven mainly by infrastructure investment and government initiatives. In France, the UAE agreed in February 2025 to finance an AI campus near Paris, which a joint venture of MGX, Bpifrance, Mistral and Nvidia is developing.[853] In February 2025, the UAE also committed about €38 billion to investment in Italy, with data centers and AI among the named sectors,[854] and in May 2026 it exchanged an agreement on AI and technology cooperation with Greece.[855]

Government memoranda have extended this engagement to several smaller member states. Bulgaria's innovation ministry signed a memorandum with G42 in September 2022 on AI and cloud for energy efficiency, digital government and smart cities,[856] and Cyprus's digital-policy ministry signed one with Khazna, the data center arm of G42, in October 2024.[857] Cyprus signed an AI cooperation memorandum with the UAE at the World Governments Summit in Dubai in February 2025, and Slovenia signed one at the same summit in February 2026.[858] Hungary's economy ministry signed agreements with the UAE Ministry of Investment on data center and AI projects during the Emirati president's official visit to Budapest.[859]

Emirati companies also build direct partnerships in Europe. In May 2025, G42 agreed with French model developer Mistral to co-develop model training, AI agents, infrastructure platforms, and

industry applications across Europe, the Middle East, and the Global South.[860] In August 2025, G42's sovereign cloud and AI infrastructure company, Core42, contracted access to up to 10,000 GPUs from the Frankfurt-based Northern Data Group.[861] In May 2025, G42 partnered with Italy's iGenius, now renamed Domyn, to deploy a cluster of thousands of Nvidia Blackwell GPUs, Europe's largest AI compute deployment.[862] In December 2025, Core42 set up its European headquarters in Dublin.[863] In June 2026, G42 also signed a memorandum with the Spanish bank Santander covering banking intelligence, agentic financial services and AI infrastructure.[864]

Data center investment between European and Emirati companies flows in both directions. The Dutch developer VOLT agreed in April 2026 with the Dubai Integrated Economic Zones Authority to build a 29-megawatt AI data center in Dubai Silicon Oasis, expandable by a further 100 megawatts.[865] Edgnex, the data center company of the Emirati developer DAMAC, is investing €400 million in a 40-megawatt data center in Madrid, its first in Spain, due to become operational in 2026.[866]

The French model developer LightOn hosts TelecomGPT, a telecom language model released by the GSMA Foundry and Khalifa University in November 2025, and its GPUs trained the accompanying Open Telco knowledge graph.[867] In May 2026, the French group Schneider Electric signed a twelve-month memorandum with the UAE environment ministry to apply AI and sensors to indoor air-quality monitoring and a smart-agriculture pilot.[868] In defense, the UAE group EDGE acquired a majority stake in Estonia's Milrem Robotics, the maker of the THeMIS uncrewed ground vehicle, in February 2023.[869]

Israel: The start-up partner with military entanglements

Israel's AI focus is driven by its start-up-friendly environment, with light governance. Since 2024, the National Program for AI has supported the industry by funding R&D and compute infrastructure, helping private industry develop applied AI, much of it spun out of defense and intelligence units.[870] This was later supplemented by a new national plan to accelerate AI development, adopted in June 2026.[871] Israel's 2023 policy on AI regulation and ethics outlines a sector-specific, risk-based approach that uses softer regulatory tools, such as technical standards, anchored in public-private dialogue, rather than a single binding overarching AI law.[872]

OECD assesses Israel as being well positioned in the global AI market.[873] Tortoise Media's Global AI Index ranked Israel ninth in the world for AI capacity in 2024.[874] Israel is a global leader in talent concentration, reflected in the relatively high volume of newly established AI startups and their ability to attract VC investment.[875] Almost half of all new high-tech startups and funding rounds have been tied to AI. These are concentrated mostly in software development, particularly cybersecurity, with significant activity also in life sciences and agri-tech (smart irrigation).[876] A significant portion of innovation also happens in connection with the defense industry.

Israel's flexible regulatory approach helped to create favorable conditions for AI experimentation and growth while protecting privacy and trust in AI systems. Because of this accessible, private-industry-first system, Israel has served as a deployment partner for several European projects and use cases, mostly in automotive perception, medical imaging, industrial monitoring, and, crucially, cybersecurity. For instance, German automotive giant Volkswagen, through its autonomous-driving subsidiary MOIA, relies on Israeli partner Mobileye to deploy its self-driving system.[877]

Compute, however, remains one of the main bottlenecks to AI development and deployment. Accelerating compute capacity development is a priority in Israel's national AI strategic plan, adopted in August 2026.[878] OECD has also found that the Israeli AI ecosystem would benefit from

further investment in scientific research and higher education.[879] As the subsequent analysis shows, the EU has been an active cooperation partner to Israel in both areas.

At the level of direct engagement, Israel-EU cooperation in AI is characterized by significant acquisitions and mergers, with capital flowing in both directions. Israeli firms are acquiring European AI companies to expand in the European market. For example, NiCE's deal of about €820 million to take over Germany's Cognigy, which seeks to automate the customer service industry.[880] The Israeli robotics company XTEND also acquired Latvian robotics company Atlas, creating XTEND XFAB Latvia as its European manufacturing and engineering center for drones serving defense customers.[881]

In the opposite direction, EU institutions and European investors have backed companies including NeuReality, which received €2.5 million from the European Innovation Council (EIC) Accelerator plus EIC Fund equity;[882] DeepKeep, which was selected for EIC Accelerator blended finance combining a grant of up to €2.5 million with EIC Fund equity;[883] and Nanovel, which received a €2.5 million EIC grant and was selected as a candidate for up to €4.3 million in EIC equity.[884] European corporate investors have also taken stakes in Israeli startups, including SAP in Datricks,[885] Philips in CVAid Medical,[886] Volvo in CorrActions,[887] and Schneider Electric in Augury.[888] In 2021, Czech VC funds DEPO Ventures and Tensor Ventures invested in US-Israeli AI-chip startup Neuronix AI, which develops technologies that reduce energy consumption and computing costs for AI/ML processing, particularly in edge-computing environments.[889] The Czech investors later, in 2024, exited Neuronix successfully, selling their stakes to US semiconductor company Microchip Technology. [890]

These investments are also often tied to deployment in specific AI applications. For instance, Škoda Auto became a minority shareholder in the Israeli start-up Anagog in 2018, whose software uses artificial intelligence to analyze smartphone sensor data.[891] The Dutch technology group Philips acquired the Israeli AI imaging company DiA Imaging Analysis in May 2023 for about €90 million.[892]

Amsterdam-based Nebius has also been chosen to build and operate the Israeli national supercomputer, further linking the company to Israeli AI developments.[893] Israel is also formally integrated into European research and compute infrastructure, having acceded to the EuroHPC Joint Undertaking, an entity that lets the EU and participating countries coordinate efforts and resources to improve European supercomputing.[894]

At the government-to-government level, cooperation with Israel has included regulatory and policy dialogue on AI and related technologies. Germany established a digital dialogue with Israel covering AI, quantum computing and digital governance,[895] while other member states have

Nebius, on both sides of the Europe-Israel relationship

Nebius, an AI cloud infrastructure company domiciled in Amsterdam, plays a role on both ends of EU-Israel AI cooperation. In May 2025, Nebius was contracted to build and operate Israel's national AI supercomputer under the country's National AI Program, a €125 million system of about 4,000 Nvidia Blackwell processors delivering 16,000 petaflops, with about €40 million of funding coming from the Israel Innovation Authority. Its first phase became operational in January 2026. In February 2026, it agreed to buy Tavily, an Israeli startup building an agentic search-and-retrieval layer that connects AI agents to the web, for about €160 million, with up to €75 million more tied to revenue targets and staff retention. This shows that EU-Israel AI cooperation is not limited to research partnerships or commercial investment, but increasingly extends to the infrastructure and capabilities underpinning national AI ecosystems.

pursued cooperation on specific regulatory and deployment issues, including autonomous vehicles and cybersecurity. At the multilateral level, Israel also signed the Council of Europe Framework Convention on AI and Human Rights in 2024,[896] alongside EU member states and other European countries. Government-to-business engagement has provided a further channel for regulatory alignment. For instance, Israeli facial-recognition company Corsight AI joined the EU AI Pact's voluntary commitments.[897]

In research and innovation cooperation, Israel has been an associated country of the EU's Horizon Europe research fund since December 2021, allowing its universities to participate in grant calls and join numerous AI-related consortia. Under this scheme, the EU has funded joint research with Israeli scientists on a range of topics, including both projects that further develop AI capabilities and trustworthy AI, as well as projects that focus on specific applications of AI in healthcare and biotech. Research cooperation also advances at the bilateral level. In 2019, research institutions from Italy and Israel established Artificial Intelligence 4 Cultural Heritage (AI4CH), a three-year joint laboratory focused on AI applications in cultural heritage.[898] In 2025, France's Health Data Hub and Israel's Technion-Rambam Initiative in Medical AI jointly awarded a research grant to a binational team to develop AI-driven technology for rapid MRI scans for high-precision brain morphometry.[899]

However, in July 2025, the European Commission, as part of a broader review of ties with Israel, proposed to partially suspend Israel's participation in the program, concerning access to EIC Accelerator grants, over the ongoing crisis in Gaza.[900] However, one year later, the European Council has not yet formally adopted the proposed suspension. Nevertheless, between 2022 and 2025, scientific cooperation with Israel across all fields (including AI) has decreased by about half.[901] But a full halt of cooperation is unlikely, as some member states continue to open grant calls for bilateral research cooperation. For instance, in 2026, Slovak and Israeli national research and development funders announced a grant call for joint research on the technological aspects of AI safety, among other topics.[902]

Historically, Israel's tech industry, and the AI industry is no exception, has been closely connected to the military. This is illustrated by the founding of the AI and Autonomy Administration in January 2025, tasked with leading research and development in artificial intelligence and autonomous systems across Israel's armed forces. This suggests Israel's AI industry will remain a core pillar of its defense strategy, integrating the armed forces and defense firms into Israel's AI ecosystem.[903]

To that end, there are documented cases of AI tools being utilized by the Israeli military against Palestinians in the West Bank and Gaza,[904] most clearly through surveillance and military targeting.[905] In September 2025, Microsoft suspended some of its AI cloud services because the Israeli defense ministry used them for prohibited surveillance, violating its terms of service.[906] Recently, Israel has been actively involved in influencing how Western AI models report on Gaza.[907]

The EU has also funded dual-use Israeli AI technologies that later had military applications. Between 2022 and 2023, Sightec, an Israeli developer of AI-based autonomous-drone navigation, received almost €2.5 million through Horizon Europe for AI-enabled autonomous drone navigation, including visual positioning, detection, tracking, and operation without GPS.[908] While the EU funded a civilian project, the technology has also downstream military applications. In December 2025, the company said its systems had completed 3,000 "battle-proven" deployments with defense and security forces over the previous year, including reconnaissance and targeting support.[909]

But the experiences of Israeli companies with development and deployment of defense AI is also crucial to European states' own remilitarization efforts. For instance, Israeli defense-AI firm Axon

Vision cooperates with the Czech company Retia, part of defense conglomerate Czechoslovak Group (CSG). Axon Vision will install its AI-based EdgeSA situational awareness system on the Pandur 8x8 EVO armored personnel carriers, as part of a long-term cooperation intended to extend to additional CSG platforms.[910]

This situation is creating a political dilemma for some European policymakers. The need to develop advanced drone and autonomous-systems capabilities for European defense can strongly benefit from cooperation with Israeli defense firms. But the technical benefits are being weighed against concerns that the same technologies supported through European programs may derive from or contribute to Israeli military operations in Gaza that lack public support in the EU.

Overall, Israel is an attractive AI partner for Europe because of its startup ecosystem, applied capabilities, research base and defense-driven innovation model. Europe is deeply integrated with this ecosystem through investment, research, infrastructure and deployment. EU cooperation with Israel on AI has allowed it to acquire AI capabilities by working with a broad start-up ecosystem and venture capital sector, buying, backing, and financing domestically grown AI.

While commercially beneficial, the intertwined nature of civilian and defense AI development in Israel creates risks for the EU that EU-funded or EU-developed technologies might be deployed in ongoing Israeli military operations. Due to this risk, the EU needs to assess whether its AI cooperation with Israel contributes to military activities otherwise not supported by the EU or oppression of religious and ethnic minorities. This requires new partnerships to implement due diligence, investment screening, research security risk management frameworks, and export control regimes at both the EU and member-state levels.

Conclusion

While the EU has led in some areas, such as legislation, public supercomputing, and AI talent, it lags in others. Three of its public supercomputing machines are in the global top 12, and it has more AI experts per capita than the US. The EU also introduced the world's first comprehensive AI law. However, it still lags in frontier model development and private capital investment. EU labs produced only one notable model in 2025, compared with 59 in the US and 35 in China. European private investors put about €18.5 billion into European AI companies against €253 billion into American ones. In deployment terms, only 20% of EU firms with ten or more employees used AI in 2025. At the same time, the EU's ability to commercially deploy AI still largely depends on American chips and cloud infrastructure, which cover about 70% of the European market.

The EU's AI Continent Action Plan seeks to respond to the growing compute gap with public AI Factories and Gigafactories. However, the €20 billion InvestAI facility covers only about a third of each Gigafactory site's capital expenditure, and the sites are due to become operational starting mid-2028. Below the Union level, a further gap remains between Western Europe and Central and Eastern Europe in AI adoption by the private sector, AI research, compute availability, and national AI funding.

Europe's compute build-up largely depends on the countries analyzed in this report, which finance and equip much of the EU's new compute. The EU, by contrast, holds only about 5% of the world's AI supercomputing capacity. Based on capital announced for data centers in Europe, as recorded in our dataset, American investors lead, followed by Japan, Canada, the UK, and the UAE. These foreign investors usually provide capital and technology, while European partners help secure land, grid connections, and electricity.

Furthermore, Nvidia's platforms power more than 90% of Europe's AI Factory build-out, and even the six supercomputers procured by the EU's own EuroHPC Joint Undertaking use hardware that comes overwhelmingly from outside the EU, with Japanese companies supplying much of it. Only further down the supply chain does Europe's role become indispensable. Taiwan's TSMC manufactures Nvidia's AI chips, largely using high-bandwidth memory from South Korea's SK Hynix and Samsung, while all three companies, in turn, depend on extreme ultraviolet lithography machines from the Dutch ASML.

European universities and research institutions attract foreign universities, research institutes, and companies with their expertise, publicly funded infrastructure, and public datasets. Over half of the joint centers set up by foreign firms at European universities are located in Germany and France, and foreign AI laboratories cluster in Western Europe. European companies set up similar laboratories abroad, more with Indian partners than with those of any other country. Health is the primary area of cooperation, followed by telecommunications and automotive. However, growing cooperation and exposure to China, whether through shared research infrastructure or joint publications, has raised concerns about research security across the EU.

Europe loses its AI talent mainly to the US, and inflows of tech workers to Europe halved from about 52,000 in 2022 to 26,000 in 2024. But between April 2024 and September 2025, for the first time, more AI workers moved from the US to Europe than the other way. It is not yet clear whether this will last or only reflects recent changes in American visa policy. Indian citizens partly fill the gap, as they received more than 192,000 first residence permits in the EU in 2024, second only to Ukrainians, and their share of the EU's AI workforce rose from 7.7 to 8.3% in a year. Still, most of

the mass skilling programs recorded in our dataset are offered by American companies, led by Microsoft, Google, OpenAI and Amazon Web Services. The largest non-American program is Huawei's Seeds for the Future.

European firms partner to deploy AI across the economy, most often in banks and hospitals. Indian IT service companies take over the IT of European firms on multi-year contracts and rebuild it around AI, while German carmakers develop the AI for their Chinese-market vehicle models in joint ventures with Chinese partners. Startup capital flows mostly from the US into Europe, and even France's Mistral, Europe's best-known model developer, was funded by American investors already from its first round and depends on Nvidia processors and American clouds. European investors fund far fewer startups abroad, mostly in the UK, Israel, the US, and India. In the other direction, EU companies supply specialized AI solutions to governments outside the EU, above all in defense and public administration.

At the EU level, AI cooperation is formalized through Digital Partnerships with Japan, South Korea, Singapore, and Canada, and through the Trade and Technology Council with India. The Trade and Technology Council with the US has not been active since 2024. Meanwhile, the UAE is still negotiating a Strategic Partnership Agreement with the EU. Member states also sign their own AI agreements. France, Germany and Poland are the most active on the European side. India is the most often courted partner country. EU member states conclude defense-related AI agreements, as defense remains a national competence, as when France and the UK committed in July 2025 to develop algorithms for synchronized missile and drone strikes, or when Germany and Israel agreed to cooperate on cyber defense. Cooperation on AI safety and standards is concentrated among like-minded partners, especially the UK, Japan, and the US. Cooperation with China is limited to the Commission's dialogues with Beijing and a few member states, with Hungary going furthest, signing a dedicated AI memorandum in June 2025. So far, no member state has joined the World Artificial Intelligence Cooperation Organization that Beijing founded in July 2026.

The AI Act applies to any provider that places an AI system or general-purpose model on the EU market, regardless of where it is based, so it sets the terms of entry for foreign developers. The American developers Amazon, Anthropic, Google, IBM, Microsoft, and OpenAI signed the voluntary Code of Practice for general-purpose models, while xAI signed only its safety chapter. European developers such as Mistral and Aleph Alpha are also signatories.[911] Meta declined, and no Chinese developer has signed, including Alibaba, Baidu and DeepSeek. Partner-country firms have also joined the Commission's voluntary AI Pact, but 41 of their 62 pledges come from American companies and only two from Chinese ones.

The US is Europe's main supplier of AI chips, cloud services and advanced models, while American investors lead in financing European data centers and start-ups. Europe therefore depends on the US significantly more than on any other partner. China is crucial to Europe's AI through research and trade, with its firms supplying servers and open-weight models. But concerns over data protection, cybersecurity, and political bias are increasingly shaping these ties, with only a few member states, led by Hungary, cooperating with Beijing at the government level. Taiwan matters to Europe above all because it manufactures most of the world's advanced chips and AI servers. Its cooperation with European countries extends to chip design, telecommunications, and industrial applications, especially with France, Germany, and countries in Central and Eastern Europe. Meanwhile, Dutch ASML is a key supplier to Taiwanese chipmakers, particularly TSMC, which relies on its machinery to meet surging global demand for AI chips. South Korea is both a research partner and a major supplier of the memory chips used in AI hardware, and its chipmakers buy their most advanced production machines from ASML.

Japan is a crucial partner in investment, research, and AI governance. Japanese firms invest in European data centers, with SoftBank as a major investor; they supply EuroHPC supercomputers and work with European partners on factory robots and AI for finance or insurance. Canada is a

strong research partner that shares the EU's approach to AI governance, with health and life sciences a major area of cooperation. The UK is arguably the EU's closest research partner, associated with Horizon Europe and the EuroHPC network and hosting an AI Factory Antenna in Edinburgh. Although it regulates AI more lightly than the EU, it works closely with European partners on AI safety. The UAE acts as a sovereign investor, financing data centers and computing capacity in France and Italy while European firms supply the technology. Its close links with both the US and China make control over these facilities and their data a central concern. India is a partner for applied and industrial AI, offering talent, a large market, and IT service companies that operate many European firms' systems. Member states court India more than any other partner. Singapore is the entry point for European firms into Southeast Asia and a partner on AI safety and defense, as it hedges between the US and China. Malaysia is mainly a market for European data center technology, telecoms equipment, industrial automation and training, with little joint AI development. Israel supplies applied AI, much of it spun out of defense and intelligence units, which European firms build into their products. Investment and acquisitions flow in both directions, but the military use of Israeli AI has raised questions over European research funding.

Cooperation with partners also carries risks, beginning with Europe's dependence on the US, which gives Washington a say over the terms on which Europe obtains American chips and LLMs. The Biden-era AI Diffusion Rule of January 2025 would have capped chip purchases in seventeen member states while exempting the other ten, until the Trump administration withdrew it in May 2025. In August 2025, the EU committed to buying at least €34 billion of American AI chips and aligning its technology security rules and export controls with those of the US. In June 2026, a American export-control directive suspended access to Anthropic's most capable models for all foreign nationals for eighteen days. The dependence extends to defense, where the American data analytics company Palantir supplies NATO's Maven system for intelligence and targeting. Germany, Denmark and France began in 2026 to build or buy European alternatives, and the Netherlands wants one within two years.

Transfers of dual-use technology and human rights are a second risk category, since European research funding and trade can end up supporting military or surveillance uses of AI that European rules would not permit. In July 2025, the Commission proposed, in response to the crisis in Gaza, suspending Israeli entities' access to the EIC Accelerator, the part of Horizon Europe that funds start-ups, but more than a year later the Council of the EU had not adopted the suspension. In China, the military is building domestic AI into its planning and its analysis of satellite and drone images, and its tenders name DeepSeek far more often than any other model. European universities also keep research ties with Chinese institutions linked to the defense industry and to surveillance. This means research and innovation security practices must be firmly embedded in how the EU navigates AI cooperation with external partners, particularly authoritarian regimes like China.

A third risk is environmental, since new data centers draw electricity, water, and land from the regions that host them. EU data centers used about 70 terawatt hours of electricity in 2024, and the Commission expects about 115 terawatt hours by 2030. The strain is concentrated in a few hubs. Data centers used 22% of Ireland's metered electricity in 2024, up from 5% in 2015, and developers in the main hubs wait seven to ten years, on average, for a grid connection. Where the grid cannot keep up, operators have to bring their own supply, as Ireland's new connection rules require on-site generation or batteries that cover a data center's full demand, which can mean gas. In dry regions such as Aragón in Spain, hyperscale campuses seek large water permits in areas already struggling with drought. Host governments have begun to react: the Netherlands allows new hyperscale campuses only in two municipalities, Germany requires new data centers to reuse part of their waste heat, and Spain is drafting a cap on water use. The Union's own oversight lags behind, since only about a third of data centers reported their energy and water use in the first year of the Energy Efficiency Directive's reporting duty.

Although the EU is often described as lagging in AI, the partnerships mapped in this report show that it remains a valued partner in infrastructure, research, commerce and governance. Partners invest in EU-based data centers, work with its universities, and sign onto its voluntary commitments, drawn by Europe's strong research and large market. The same partnerships, however, deepen Europe's dependence on American chips, clouds, and models, and on decisions made in Washington or Silicon Valley. They can help tie European funding to military and surveillance uses abroad, or strain the grids and water supplies of the regions that host new data centers. A partnership matters most when it builds capacity that stays in Europe even after the agreement ends. Cooperation should build on the EU's own initiatives, such as the AI Factories and Gigafactories, and strengthen them rather than stand in for them.

Policy recommendations

- **Finance for sustainable compute:** Member states and the EU should use public funding for the build-up of AI data centers to secure computing capacity for European research and businesses. Member state-level actors, including governments and public and private funders such as banks and investment funds, should consider equity participation where it provides useful governance rights and helps cover costs. Assess planning approval and electricity supply separately, based on each site's effects on the grid, local environment, and local resources.

- **Improving access to supercomputers:** EuroHPC should make its existing AI Factory access routes easier to use across the network. EuroHPC already offers common access modes, so the priority should be consistent service across sites.[912] EuroHPC should launch pilot projects to test reciprocal access with non-EU countries. Access to future Gigafactories should build on experience with these arrangements.

- **Supply chain resilience:** Member States and the Commission should use the tools available, such as the EU ICT Supply Chain Security Toolbox, to assess the suppliers on which AI infrastructure depends before signing future deals.[913] Procurement authorities should distinguish extensive forms of control from the supply of components that confer no such overarching access. Put restrictions in place for suppliers where identified risks cannot be addressed.

- **Cloud sovereignty:** Public authorities should assess cloud services against the sensitivity of the work they will host, using tools available such as the Commission's Cloud Sovereignty Framework. The Commission should also help national buyers apply comparable criteria.

- **Closing the adoption gap:** The Commission and national authorities should seek to increase the adoption and implementation in industries where firms wish, but struggle to adopt AI. Existing European Digital Innovation Hubs and the support measures under the Apply AI Strategy provide examples of such support.

- **Regulatory dialogue:** The Commission should seek to revive the EU-US Trade and Technology Council or establish a narrower format focused on AI, for regular consultation with the US on measures affecting European access to advanced AI chips, models and cloud services. The EU could also seek to align with the US specifically on AI safety, akin to the UK's efforts in this matter. Further dialogue with other partners should also cover upcoming regulation, especially in areas where the EU is significantly exposed.

- **Clarifying AI Act obligations to facilitate partnerships:** The Commission and national authorities should supplement their existing guidance with practical examples for companies integrating or modifying open-weight models. The guidance should help firms define their role and the obligations that follow. It should also clarify how the voluntary Code of Practice and open-source exemptions affect downstream users, including when an EU representative is required. This would reduce compliance costs for firms building on open-weight models.

- **Advancing regulatory convergence:** The EU should use the emerging shift in the US debate toward stronger AI regulation to promote regulatory convergence around European standards, rather than allowing divergent approaches to become entrenched. The Commission should work with the US and other partners to demonstrate how elements of the EU's risk-based, technology-neutral approach can govern high-risk AI while preserving innovation.

- **Funding for AI research:** Major European grantmaking agencies should support joint AI research through multi-year calls with funding committed on both sides. Programs under frameworks such as Horizon Europe, the European Research Council, or various member-state agencies should offer funding to advance fundamental and applied research, with a focus on areas of strength within the EU.

- **Research security:** Beyond providing funding for the research, funding agencies should also seek to combine the funding with ensuring safe practices and the deployment of research security frameworks at funded institutions. Such a framework would build on the Council's research-security recommendation through proportionate checks on third-country partners in sensitive AI projects.[914] Further funding for specific research security practices could be tied to large research projects to ensure universities can fund safe practices.

- **Attracting AI talent to Europe:** Member states should seek to build on their strengths in AI talent. They should implement the Commission's recommendations on attracting research and innovation talent, including faster processing of researchers' documents or the EU Blue Card. Existing Choose Europe for Science and national schemes should be used to support these packages. Institutions should also address the conditions that cause researchers already in Europe to leave.

- **Building LLMs for underserved languages:** With the EU's 24 official languages, the Commission and member states should leverage the EU language technology consortium ALT-EDIC and the Language Data Space to build partnerships with countries that develop models for their own languages, including Taiwan, India or Singapore. For example, Taiwan's experience with TAIDE, a public model for Traditional Chinese, offers lessons for the EU languages. The agreement with Singapore to explore exchanges between ALT-EDIC and its SEA-LION models could serve as a template for similar arrangements with Taiwan and India.

- **AI for defense:** Defense ministries should assess whether joint development with a partner offers better control and long-term support than buying a finished AI system. Procurement should include proper precautions on data handling, rights, and compatibility across allied countries. Furthermore, systems which were implicated in human rights abuses should not be used. Projects seeking European Defense Fund support must also respect its existing conditions on third-country participation and control.[915]

- **Addressing surveillance and human rights risks:** Research funders and national authorities should pay increased attention to and collaborate on AI that may involve a risk of surveillance or human rights violations. Building on existing ethics and security reviews, higher-risk projects should identify the intended users, permitted applications and arrangements for checking how results are used.[916] Institutions involved and activities performed should be reviewed, without assuming that every partnership with a country presents the same risk.

- **Addressing environmental and energy constraints:** National and local authorities should require developers of AI data centers to demonstrate how a proposed site will obtain electricity and cooling water without significantly affecting local infrastructure. Existing EU reporting on data-center energy and water use should inform these decisions and the ongoing monitoring of completed projects.[917] Permit and funding conditions should reflect local constraints, and publicly financed infrastructure partnerships abroad should include comparable environmental safeguards that account for local conditions.

- **Strategic communication:** Governmental and business stakeholders should engage local communities proactively and use strategic communication to explain how community concerns surrounding environmental and public health impacts are going to be mitigated.

- **Advancing applied AI through partnerships:** Bilateral AI cooperation should support projects built around a defined need in health, energy, mobility, manufacturing or agri-food. The Apply AI Strategy and existing testing and experimentation facilities already provide a basis for this approach.[918] Successful pilots should have a route to procurement or wider use.

- **Expanding AI infrastructure exports:** The Commission and national agencies should coordinate further support for European suppliers participating in AI infrastructure projects abroad. They should leverage the Global Gateway, which already supports digital infrastructure, and prioritize identifying eligible projects and matching them with suitable financing instruments.[919] Support should account for a complex assessment of demand, viability, and environmental impacts.

- **Strengthening European AI chip capabilities:** EuroHPC and the Chips Joint Undertaking should connect existing European processor and chip-design programs more closely with the needs of AI researchers and industry. The Digital Autonomy with RISC-V in Europe (DARE) initiative, which funds European RISC-V processors for supercomputers, and the Chips for Europe design platform and competence centers already provide a basis for this effort. European processors should be tested on suitable workloads before decisions are made to deploy them more widely, with funding for the software needed to use them. Cooperation with Taiwan, South Korea, and Japan should target specific gaps in design, memory, or packaging, and agree on how European participants can use the results. Support considered under the proposed Chips Act 2.0 should build on existing capabilities and demonstrated demand.

Appendix: Dataset and methodology

This paper draws on an original dataset of AI cooperation initiatives gathered by CEIAS and displayed in the EU's AI Partnerships Tracker.[920] The dataset documents cooperations involving artificial intelligence between at least one EU-based actor, whether a member-state government, an EU institution, a company, a university or a research institute, with a counterpart from one of twelve countries, namely Canada, China, India, Israel, Japan, Malaysia, Singapore, South Korea, Taiwan, the UAE, the UK, and the US. Each record captures the actors on both sides; a description of the cooperation; its start and end date and status; its cooperation and activity type; disclosed funding; and other involved actors.

The group selected partner countries based on their significance in the global AI ecosystem, particularly in the development, deployment, and governance of LLMs and related technologies. The group comprises countries that consistently rank highly in the Stanford AI Index Report 2025 and Stanford HAI's Global AI Vibrancy Tool.[921] These countries constitute major centers of AI advancement, encompassing frontier model development, advanced research ecosystems, private-sector investment, computing infrastructure, and government-led AI strategies. Although Taiwan does not consistently rank at the top of these indices, its central role in the AI hardware supply chain warranted its inclusion in the analysis.[922]

For the cooperation to be included, it must involve a substantive AI component, with AI identified as a named or central element of the cooperation, whether part of government-to-government talks and agreements, AI research, development or deployment, AI-enabling infrastructure such as data centers for AI, GPU clusters or AI cloud, AI skills programs, or AI chips and components. This paper excluded collaborations focused solely on quantum, semiconductors, cybersecurity, and general unspecified technical or digital cooperation without an explicitly mentioned AI component.

The collaborations are categorized into: Compute and Infrastructure; Research and Innovation; Talent and Skills; Government and Policy; Commercial and Industry; Investment and Deals; and Deployment. Within these, we further distinguish by activity type and industry sector. This categorization facilitates systematic mapping of cross-sector cooperation and the organization of qualitative data. The analysis generally avoids quantitative aggregation, as the nature and scale of cooperation entries vary significantly. For instance, a multi-billion-euro data center, a university joint laboratory, and a government memorandum are each counted as one entry, despite differing greatly in value, effort, and significance. Aggregating these entries into counts or percentages risks oversimplification. Therefore, the study focuses on identifying key patterns and presents specific values and figures only where they add meaningful context.

The dataset was gathered from publicly available sources using controlled, structured LLM-assisted data extraction, combined with human verification and additional searches. The figures in this paper reflect the dataset as of September 2026. As gathered via extensive searches and snowballing, the data represent a well-sourced perspective on cooperation between the EU and several examined countries. It captures publicly announced cooperation, so cooperation with little to no media coverage may be missing.

Endnotes

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How the EU cooperates its way into the global AI race
An overview of the EU's AI partnerships with 12 countries

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