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# HPC & AI Computing at a Crossroads– Securing Europe’s Sovereign AI Future

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# The AI Explosion Makes Sovereignty a Strategic Imperative

**Sovereignty now means protecting not only critical infrastructure but also values, privacy, & public trust**

## Augmented data importance[1]

EU data economy hits

**€829B**

in 2025, 6% of GDP (up from 2% in 2018)

## Increased supply-chain dependency[2]

U.S. players hold

**99%**

of the data center GPU market worldwide

## Exponential energy & infra. Implication[3]

DC energy use will

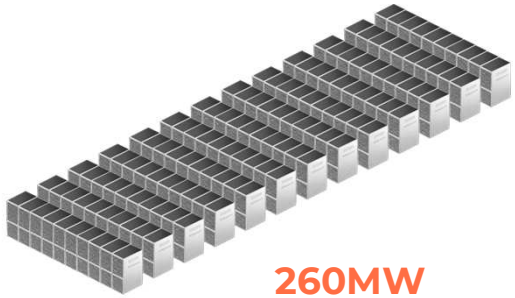
**X2+**

from 415 TWh in 2024 to 945 TWh by 2030, 1395 TWh in 2035

*Info Source: (1) The future of Europe's data economy (2) Eviden Market Analysis (3) Strategic Energy Europe*

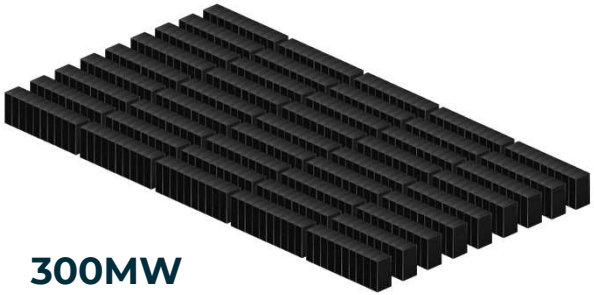
# Energy Isn’t Just an Environmental Responsibility — It’s an OPEX Driver

**BullSequana XH3000 ( 100% DLC)**



**260MW**

**xAI Colossus (85% DLC)**



**300MW**

40MW

80M€*

** Paris 20cent/kw*

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# Costly Today but Essential: AI Sovereignty to Secure Europe's Long-Term Resilience & Autonomy

## Today – higher short-term costs but crucial*

- Catch-up in critical technologies
- Smaller economies of scale
- Fragmented markets

## Tomorrow - freedom, competitiveness, and leadership

- Safeguard economic & social values
- Technology autonomy & competitiveness
- Keep talents & innovation

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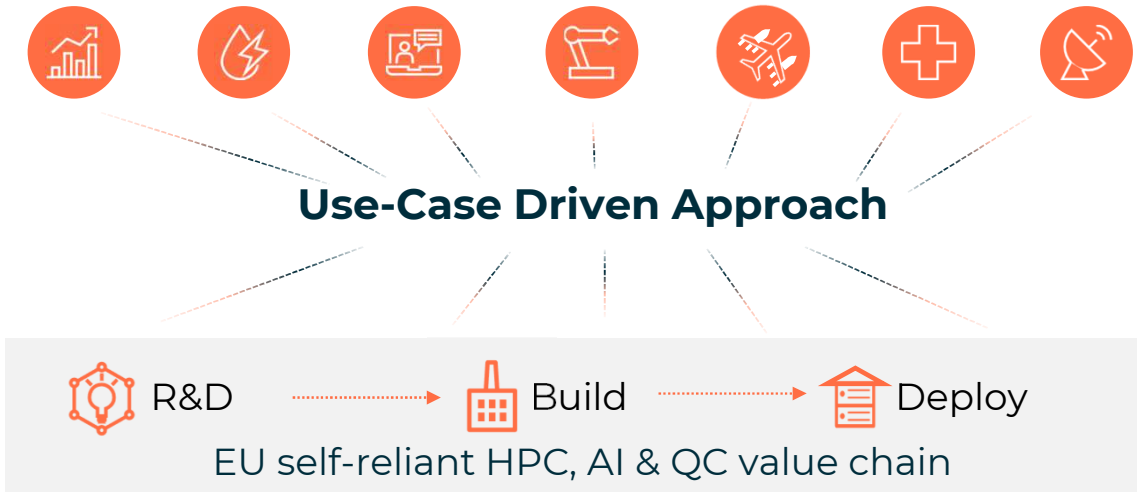
* *V.S. U.S. & China market*

# HPC-AI at a Crossroads – Securing Europe's Sovereign Simulation Future Collectively

## Eviden leads the change




- R&D: EU sovereign techno & talents, EU collaborative projects
- Energy efficiency: hold the #1, 2 & 6 in the GREEN500*
- Re-locate supply chain to EU: multiplied EU-based Bill of Materials by a factor of 4 (73%)

**User-centric approach to drive AI adoption**

**Accept initial costs as a strategic investment**

**Foster the EU HPC-AI ecosystem**

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** GREEN500 listing in Nov 2024*

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# Thank you!

Meet us at Booth A04!