



# Beyond ChatGPT & DeepSeek: Decoding AI's rise in Europe & China



# DXC at a glance

\$12.87B

FY25 revenue

60+

years of innovation delivering mission-critical systems for customers

120,000+

employees worldwide

70+

countries

200+

partner ecosystem with best-of-breed partners

50K+

engineers

AA

rating from MSCI for outstanding ESG performance

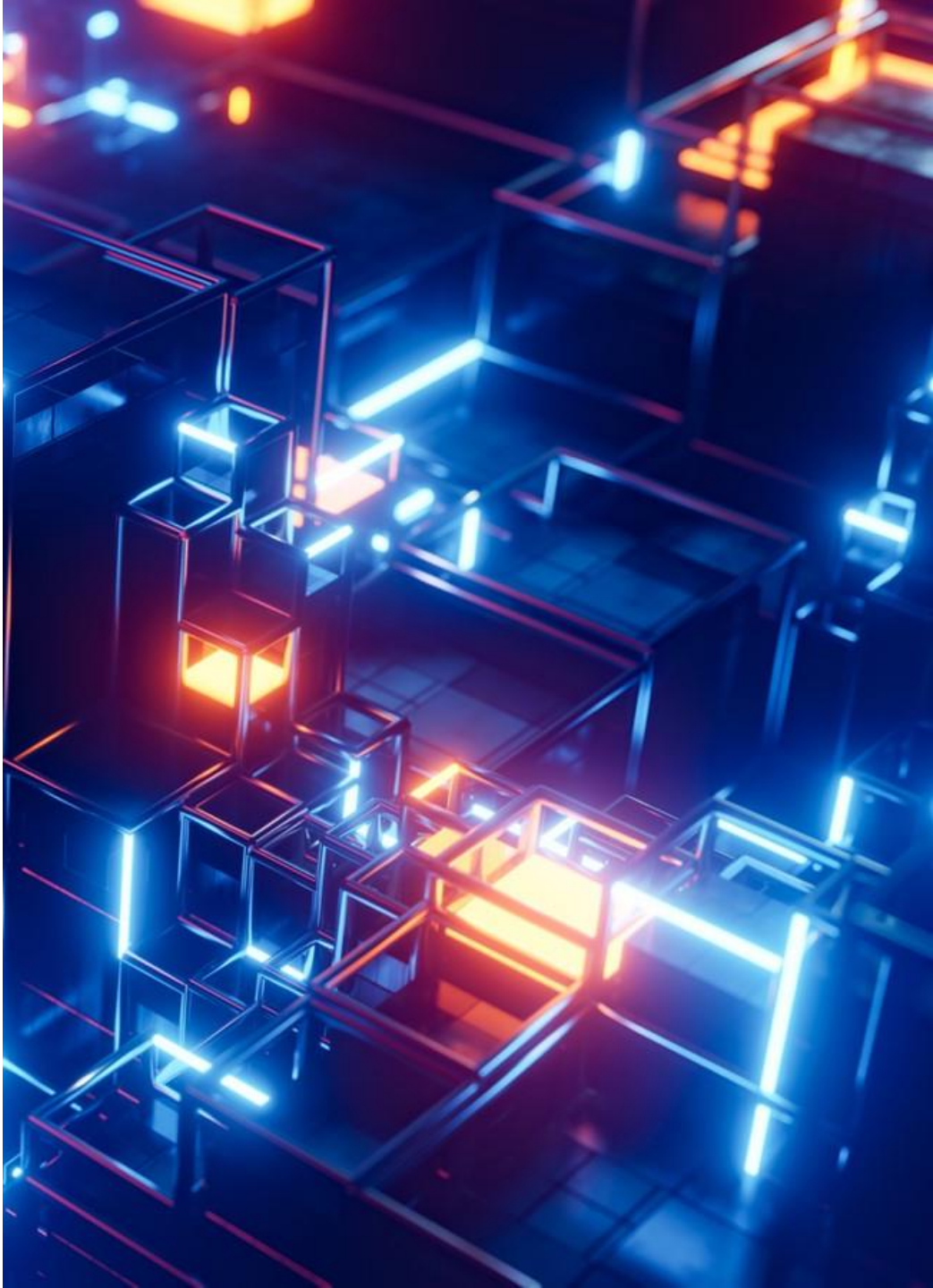
#294

in the 2024 Fortune 500



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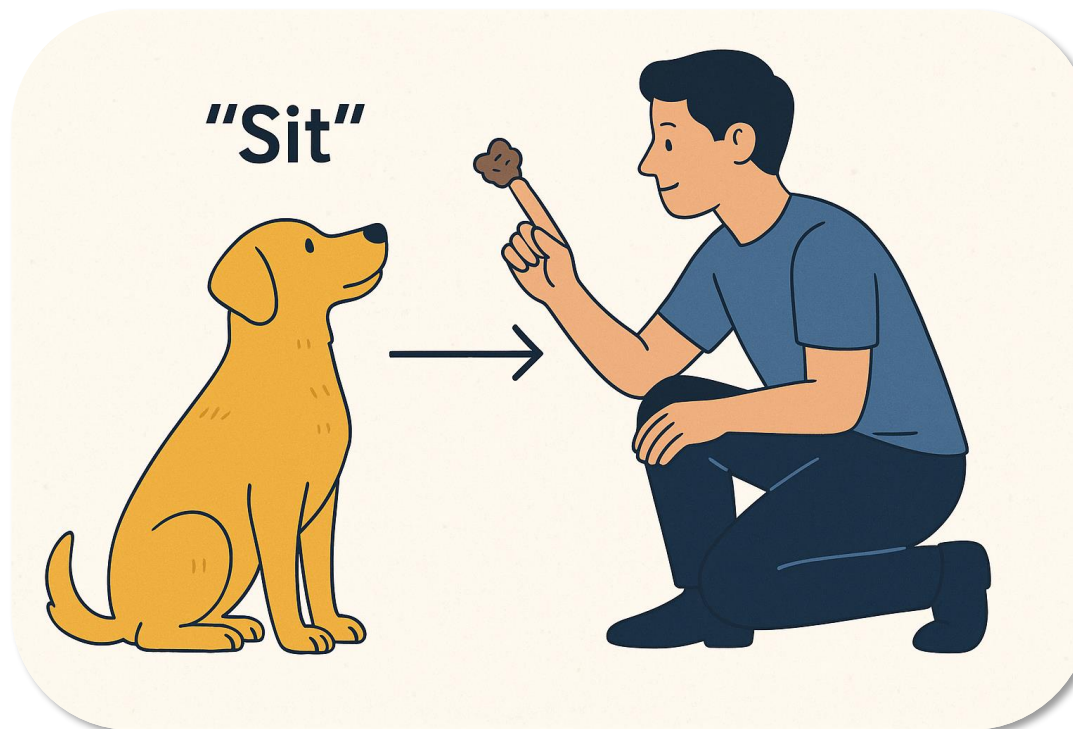
# What is an AI model?

AI models have become commodities

An AI model is a program trained on data to identify patterns or make decisions — without needing ongoing human input.

AI learns like we do — by experience. We train it with large datasets that help it recognize or predict things, and it gets more accurate over time.

AI models are now readily available and often interchangeable, making them a commodity.



Reinforcement learning

強化學習

# 什么是 AI 模型?

AI 模型已成为商品

AI 模型是一种基于数据训练的程序，用于识别模式或做出决策，而无需持续的人工输入。

AI 和我们一样，通过经验进行学习。我们使用大型数据集对其进行训练，帮助它识别或预测事物，并且随着时间的推移它会变得更加准确。

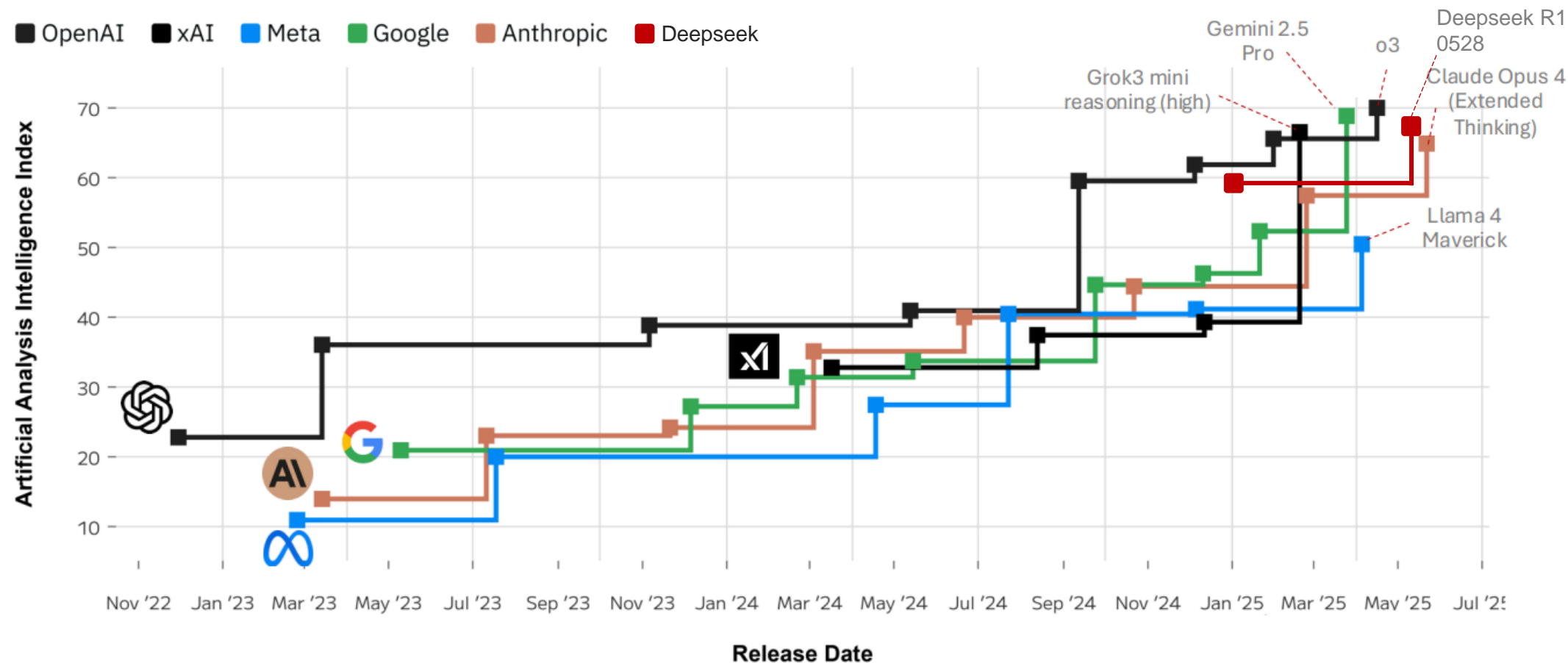
AI 模型现在很容易获得，并且通常可以互换，使它们成为一种商品。

# The AI race has begun

OpenAI no longer alone at the top

AI 竞赛已经开始

OpenAI 不再孤军奋战



Artificial Analysis Intelligence Index incorporates 7 evaluations: MMLU-Pro, GPQA Diamond, Humanity's Last Exam, LiveCodeBench, SciCode, AIME, MATH-500

Source May 2025: Artificial Analysis

# Some terminology

## 一些术语



Closed weights

Example:  
ChatGPT

Access limited  
through a  
platform or API  
only

闭合权重

示例:  
ChatGPT

仅通过平台或  
API 限制访问



Open weights

Example:  
Deepseek

Anyone can  
download and run  
the model

开放权重

示例:  
Deepseek

任何人都可以  
下载并运行该  
模型



Open source

( ≠ Open weights)

Anyone can get  
the software code  
and learn the  
underlying  
algorithms

开源

( ≠ 空重)

任何人都可以  
获取软件代码  
并学习底层算  
法

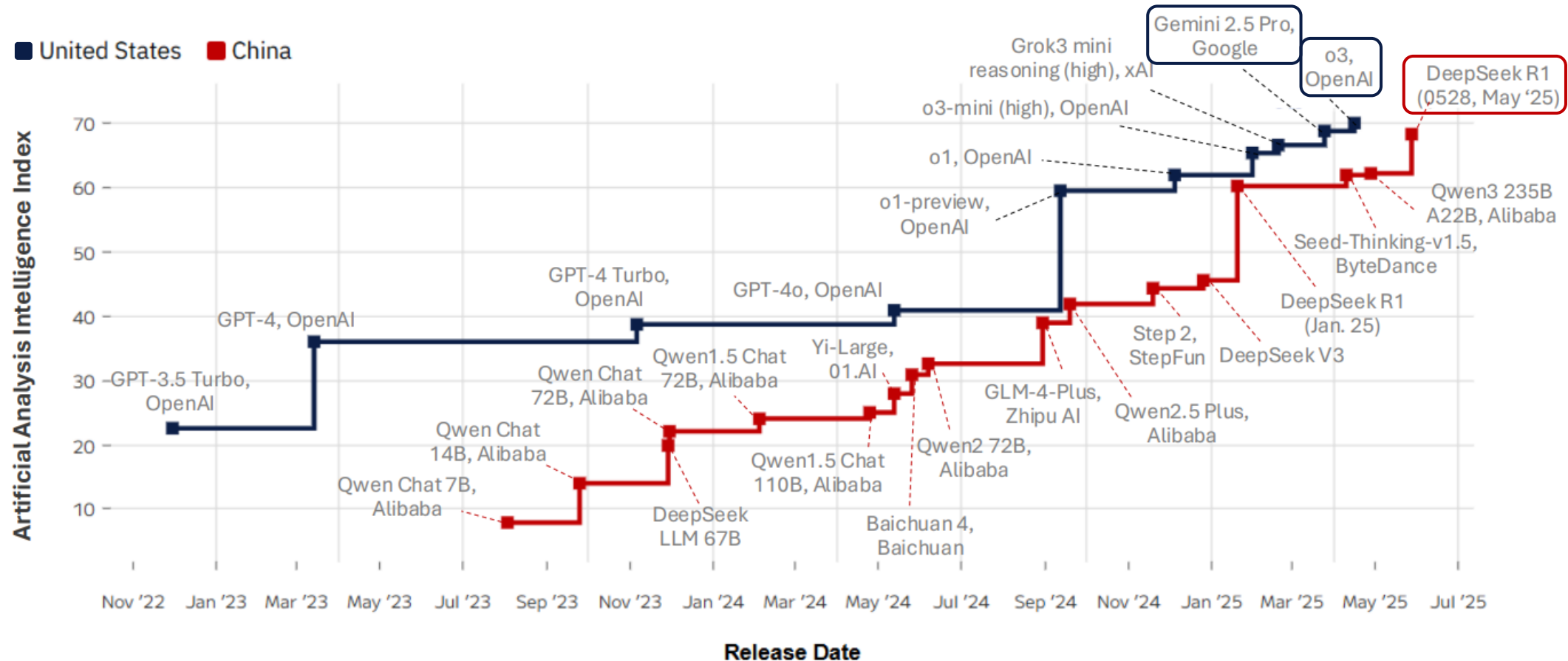
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# Comparing AI model quality over time – US & China

Closed and open weights

# 比较AI模型的质量随时间的变化 - 美国和中国

封闭和开放权重



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# Comparing AI model quality over time

Closed and open weights

# 比较 AI 模型质量随时间的变化

封闭和开放权重



The gap between US and Chinese frontier AI models has remained persistent, but is as narrow now as it has ever been

美国和中国前沿人工智能模型之间的差距仍然存在，但现在和以往一样小

DeepSeek's R1 model leads the Chinese AI labs, while OpenAI's o3 leads the US AI Labs, the EU is absent at the frontier

DeepSeek 的 R1 模型引领中国的 AI 实验室，而 OpenAI 的 o3 引领美国的 AI 实验室，欧盟则处于前沿

DeepSeek joined the ranks of OpenAI, Google and Anthropic as frontier AI labs

DeepSeek 加入了 OpenAI、Google 和 Anthropic 的行列，成为前沿的 AI 实验室

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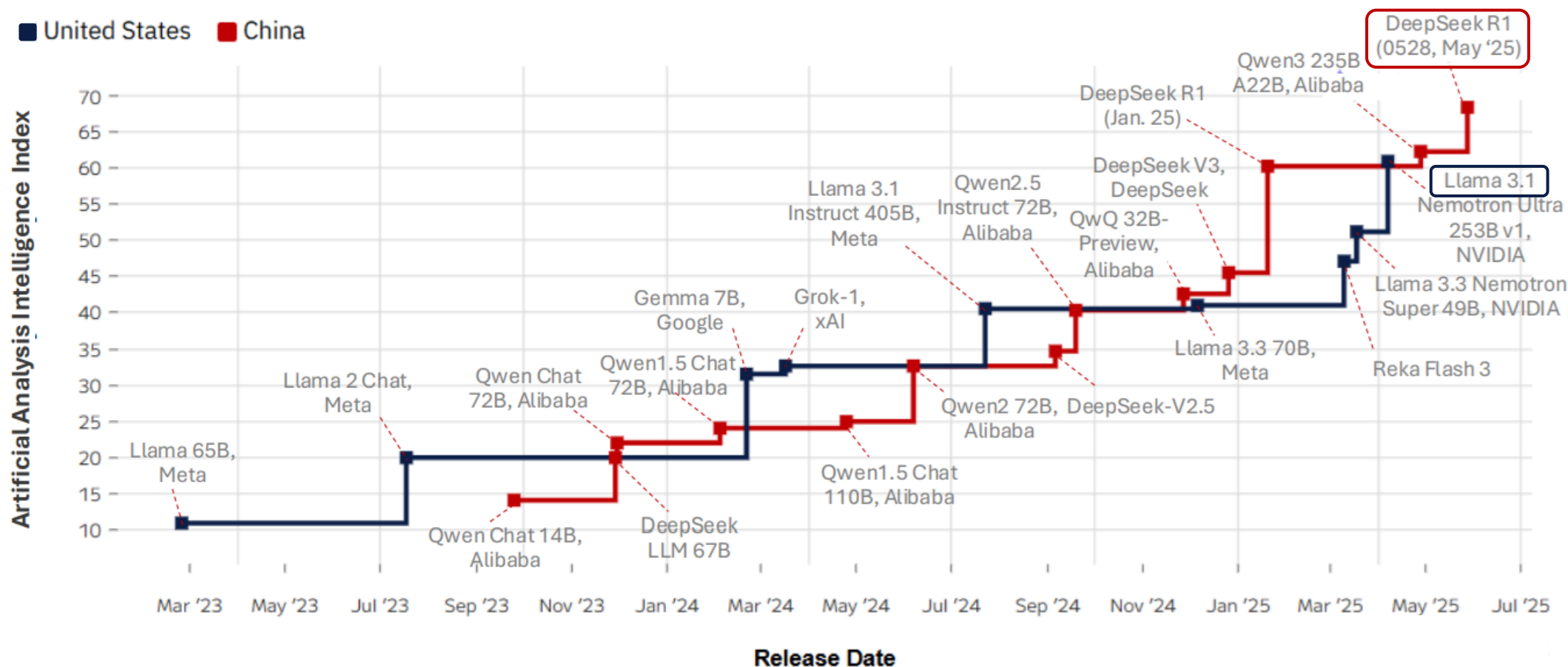


# Comparing AI model quality over time – US & China

Open weights only

# 比较 AI 模型质量随时间的变化

仅开放权重



Artificial Analysis Intelligence Index incorporates 7 evaluations: MMLU-Pro, GPQA Diamond, Humanity's Last Exam, LiveCodeBench, SciCode, AIME, MATH-500

Source May 2025: [Artificial Analysis](#)

# Comparing AI model quality over time

Open weights only

# 比较 AI 模型质量随时间的变化

仅开放权重



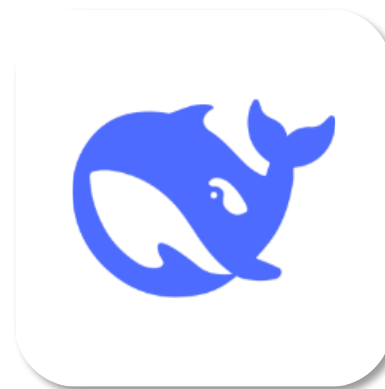
The Chinese AI labs surpassed the open weights frontier since November 2024 with Alibaba's QwQ model

DeepSeek 的 R1 是目前可用的最智能的开放权重模型



Chinese AI labs strategy is to open source the weights of their flagship models, this contrasts with the non-Chinese AI labs

中国 AI 实验室的策略是开源其旗舰模型的权重，这与非中国 AI 实验室形成鲜明对比



DeepSeek's R1 is the most intelligent open weights model currently available

DeepSeek 的 R1 是目前可用的最智能的开放权重模型

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# What is the DeepSeek AI model for different participants?

## 适合不同参与者的 DeepSeek AI 模型是什么？



For regular users – a cool new app on their mobile

对于普通用户 – 他们手机上的酷炫新应用程序



For (some) hyperscalers – a cheaper LLM, potentially driving more consumption<sup>1</sup>.

对于（一些）超大规模企业来说 – 更便宜的 LLM，可能会推动更多的消费<sup>1</sup>。



For model providers – a game-changing competitor.

对于模型提供商 一个改变游戏规则竞争对手。



For GSIs and software vendors – an opportunity to dramatically enhance their offerings.

对于 GSI 和软件供应商来说，这是一个显著增强其产品的机会。

<sup>1</sup>Jevons Paradox



# Why choose open weights models?

# 为什么选择开放权重模型？



## Sovereignty

Keep data and data processing locally for privacy and local control

## 主权

将数据和数据处理保存在本地，以实现隐私和本地控制



## Further model training

Evolve the model for specific purposes with additional training

## 进一步的模型训练

通过额外的训练为特定目的改进模型



## Cost efficiency




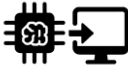


Avoiding vendor lock-in and reducing long-term costs.

## 成本效益

避免供应商锁定并降低长期成本。

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# How do China and the EU differ?

	Europe	China	
	<b>Model capability</b>	Absent from top-tier performance	Closing gap with U.S. frontier
	<b>Openness</b>	Mistral & Hugging Face	Embracing open-weight strategy
	<b>Regulation</b>	Regulatory leadership	Centralized control, fast-moving
	<b>Compute access</b>	Fragmented compute power Makes the machines that make the chips (ASML)	Limited by chip bans Domestic hardware emerging
	<b>Energy supply</b>	Constrained, variable across countries; high prices & green-energy focus	Ample, diversified and centralized; cost competitive
	<b>Strategic direction</b>	Policy-first Flexibility emerging?	Large national-scale investments Competitive drive

# Chinese AI news

# 中国 AI 新闻





# A small sample of Chinese companies in the AI race

# AI 竞赛中的中国公司的小样本

## Tech Giants 科技巨头



## Emerging Leaders 新兴领导者



## Specialized Companies 专业公司



# Key Takeaways

# 关键要点



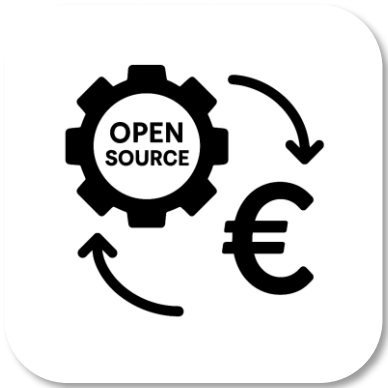
AI innovation is  
accelerating  
globally

AI 创新正在  
全球加速



Top-tier AI  
models are  
continually  
being  
challenged

顶级 AI 模型  
不断受到挑战



Open weights  
models are  
reshaping the  
value chain

开放权重模型  
正在重塑价值  
链

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Let's continue the conversation — scan to connect

