

CONSULTING DAY 2025



9 e 10 Ottobre 2025
VENEZIA | Hotel Avani Rio Novo

AVANI
HOTELS
& RESORTS

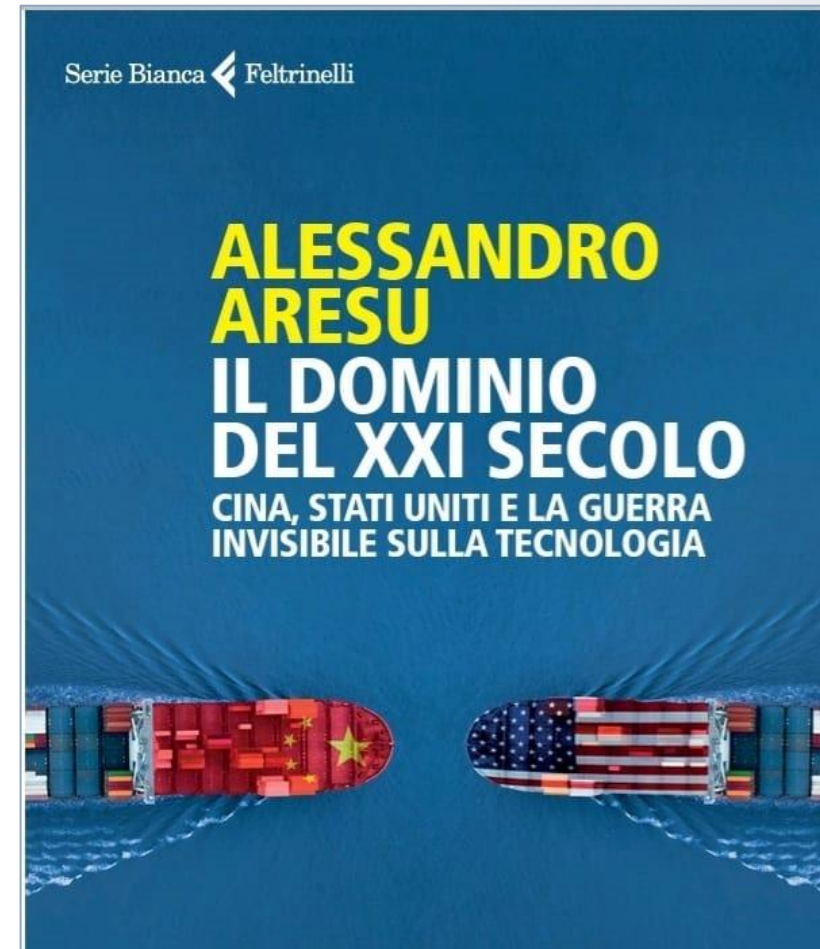
GEOPOLITICA DELL'INTELLIGENZA ARTIFICIALE ALESSANDRO ARESU

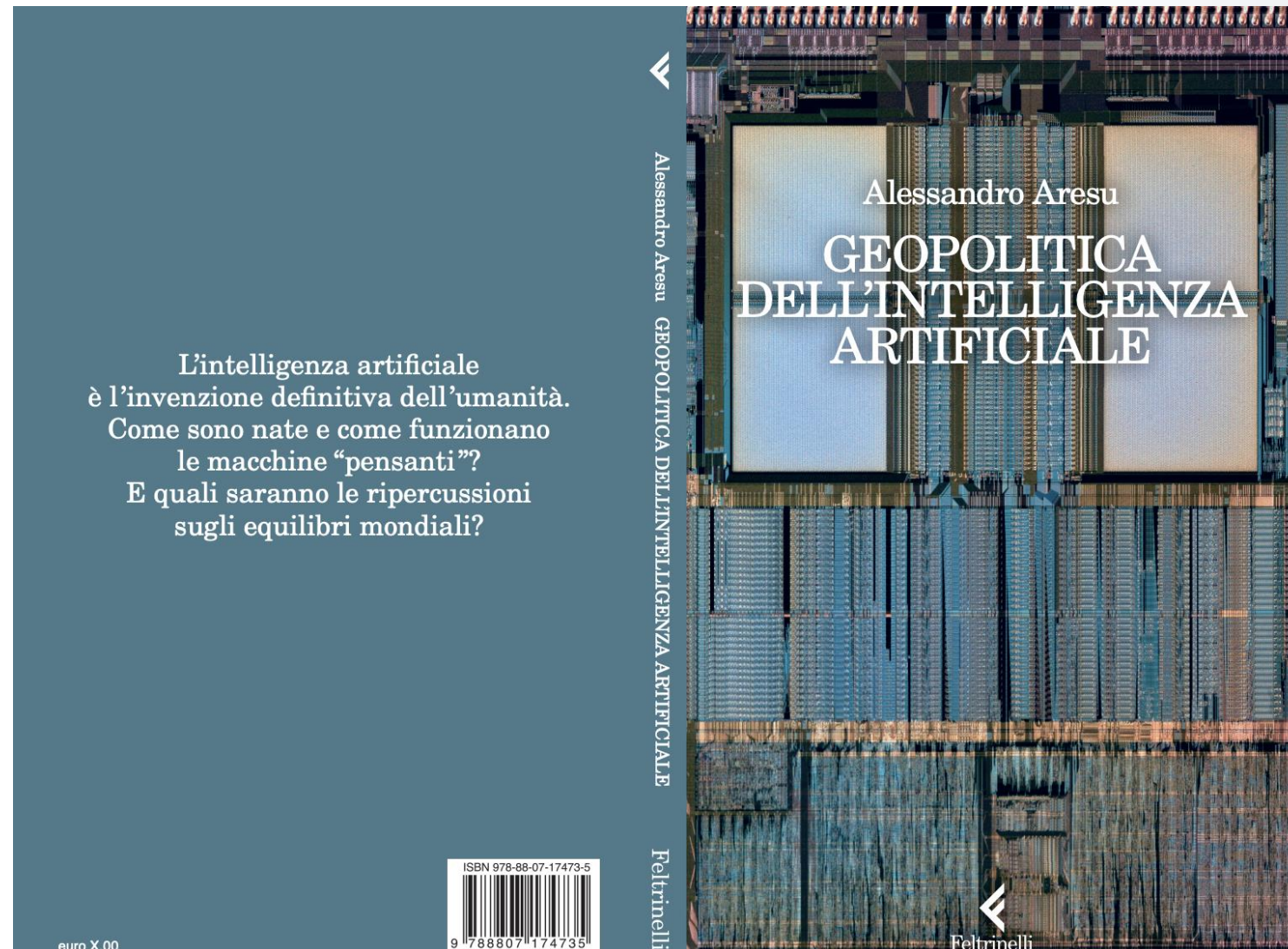


I. IL CONTESTO STRATEGICO

II. LA STORIA DELLA FILIERA

III. I FATTORI DELLA COMPETIZIONE





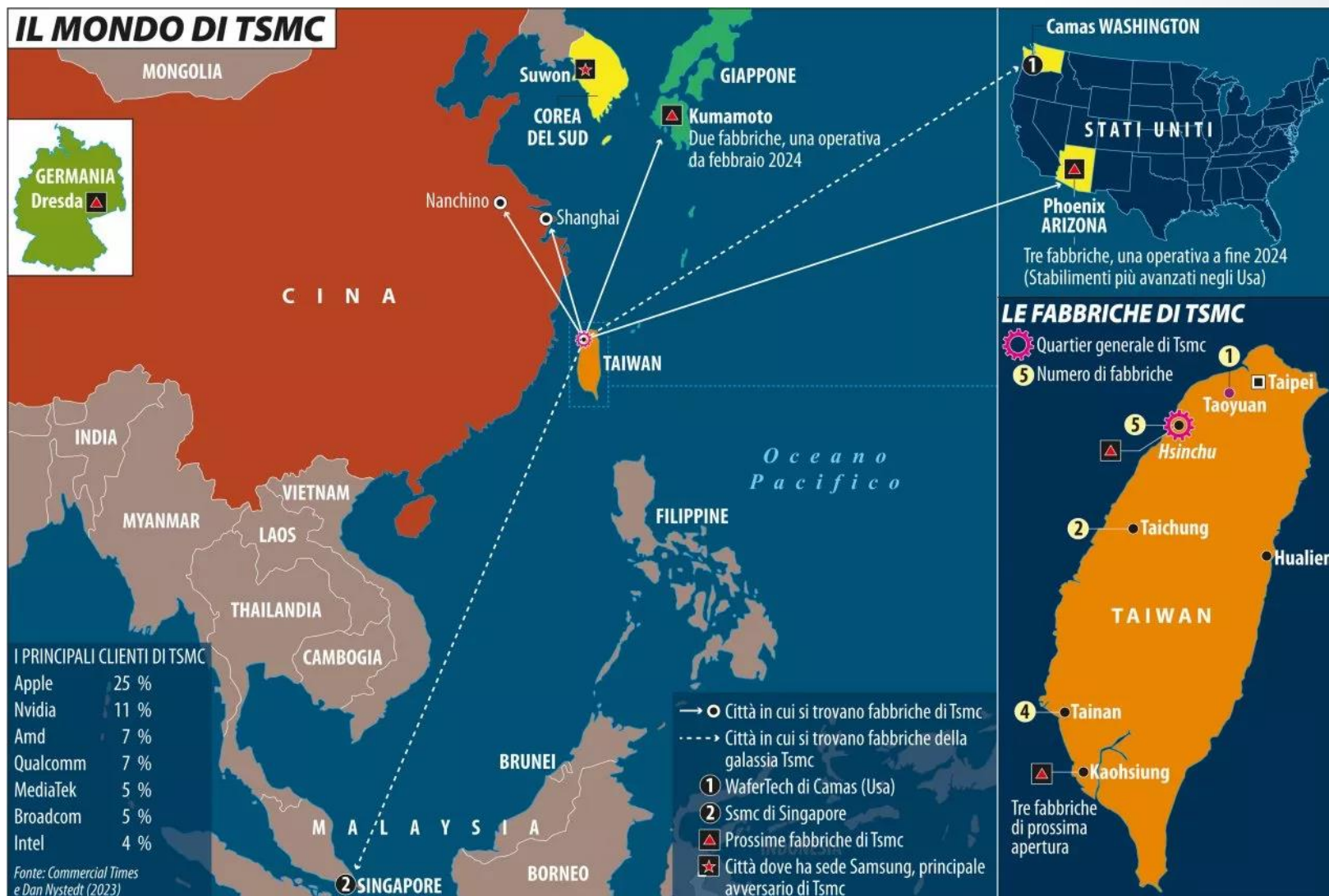




Number of TEUs

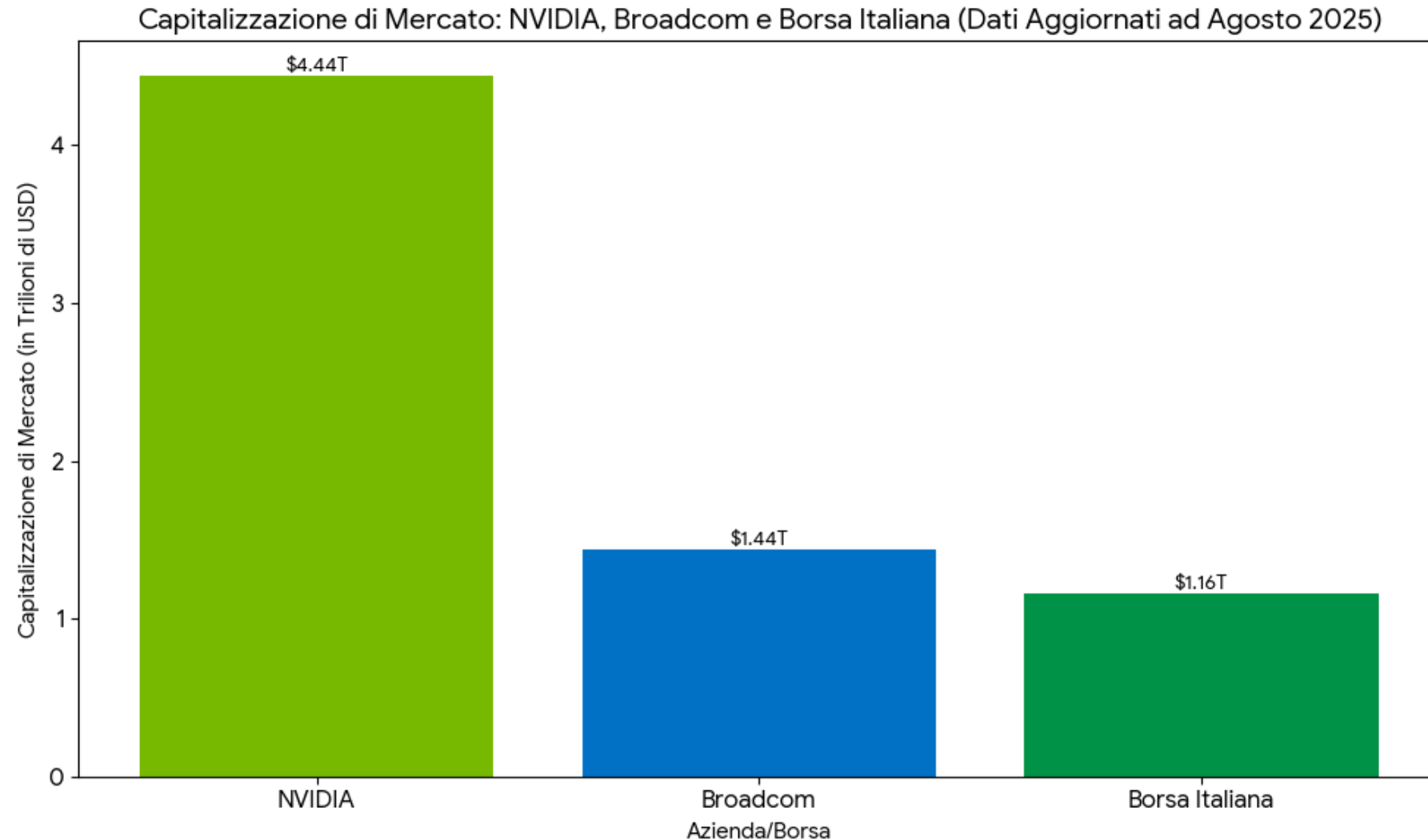
Rank	Port	Country	2023	2024	% change
1	Shanghai	CN	49,158,000	51,510,000	4.8%
2	Singapore	SG	39,012,900	41,124,100	5.4%
3	Ningbo - Zhoushan	CN	35,300,000	39,300,000	11.3%
4	Shenzhen	CN	29,880,000	33,400,000	11.8%
5	Qingdao	CN	28,760,000	30,870,000	7.3%
6	Guangzhou	CN	25,100,000	26,070,000	3.9%
7	Busan	KR	23,140,000	24,400,000	5.4%
8	Tianjin	CN	22,190,000	23,290,000	5.0%
9	Jebel Ali	AE	14,472,000	15,530,000	7.3%
10	Port Kelang	MY	14,061,022	14,644,727	4.2%

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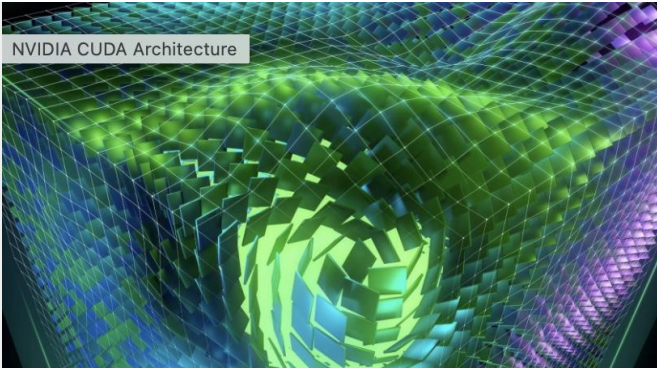


GEOPOLITICA DELL'INTELLIGENZA ARTIFICIALE







		
1999	2006	2012
GPU	CUDA	AI
Invents the GPU, the graphics processing unit, which sets the stage to reshape the computing industry.	Opens parallel processing capabilities of GPUs to science and research with unveiling of <u>CUDA</u> ® architecture.	Sparks the era of <u>modern AI</u> by powering the breakthrough AlexNet neural network.



ImageNet Classification with Deep Convolutional Neural Networks

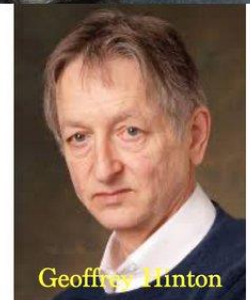
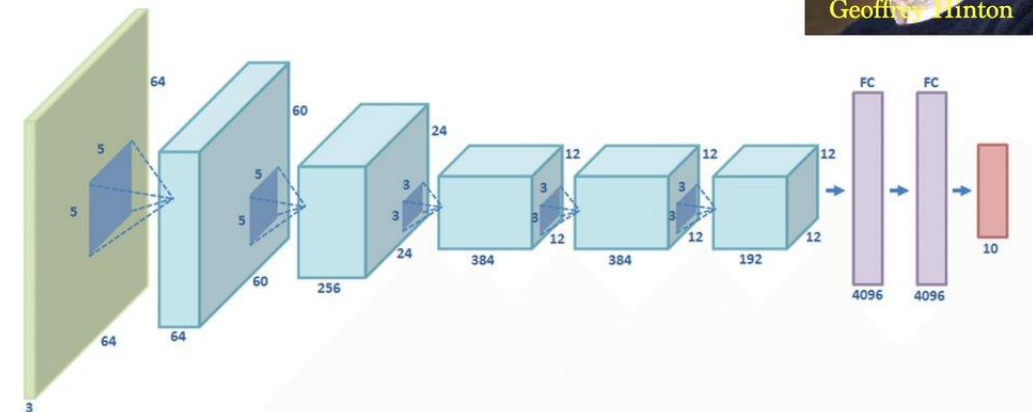
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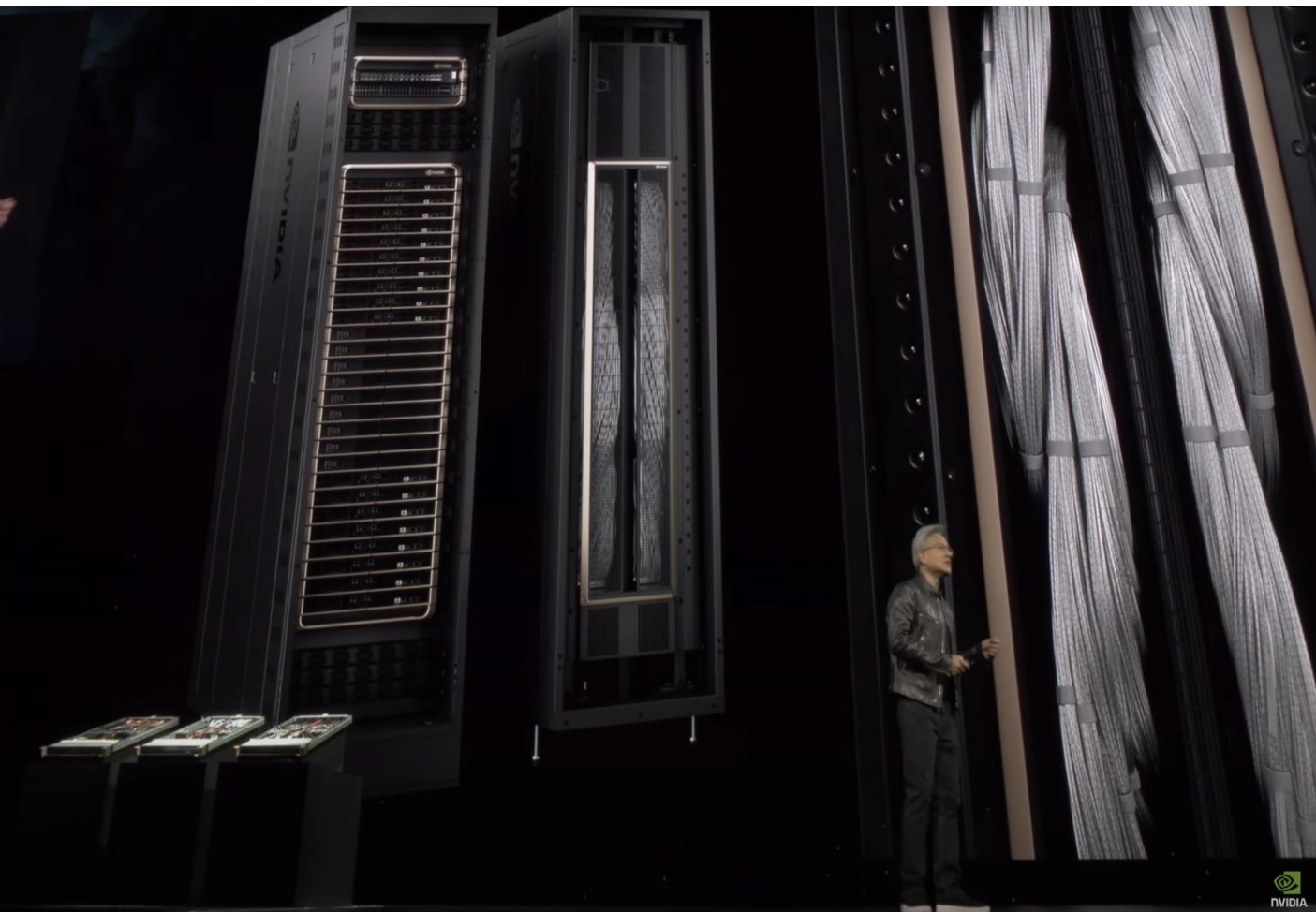
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Abstract

We trained a large, deep convolutional neural network to classify the 1.2 million high-resolution images in the ImageNet LSVRC-2010 contest into the 1000 different classes. On the test data, we achieved top-1 and top-5 error rates of 37.5% and 17.0% which is considerably better than the previous state-of-the-art. The neural network, which has 60 million parameters and 650,000 neurons, consists of five convolutional layers, some of which are followed by max-pooling layers, and three fully-connected layers with a final 1000-way softmax. To make training faster, we used non-saturating neurons and a very efficient GPU implementation of the convolution operation. To reduce overfitting in the fully-connected layers we employed a recently-developed regularization method called "dropout" that proved to be very effective. We also entered a variant of this model in the ILSVRC-2012 competition and achieved a winning top-5 test error rate of 15.3%, compared to 26.2% achieved by the second-best entry.





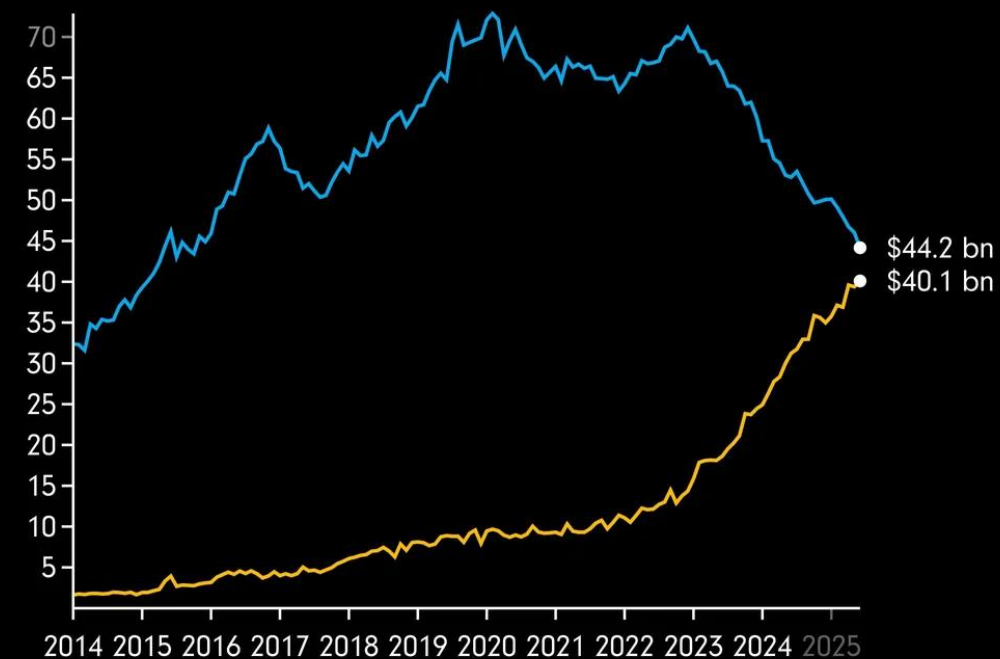


Data Center vs. Office Construction

Jun 2025

SAAR (\$ Billions) in the U.S.

— General office — Data center



PlotSet

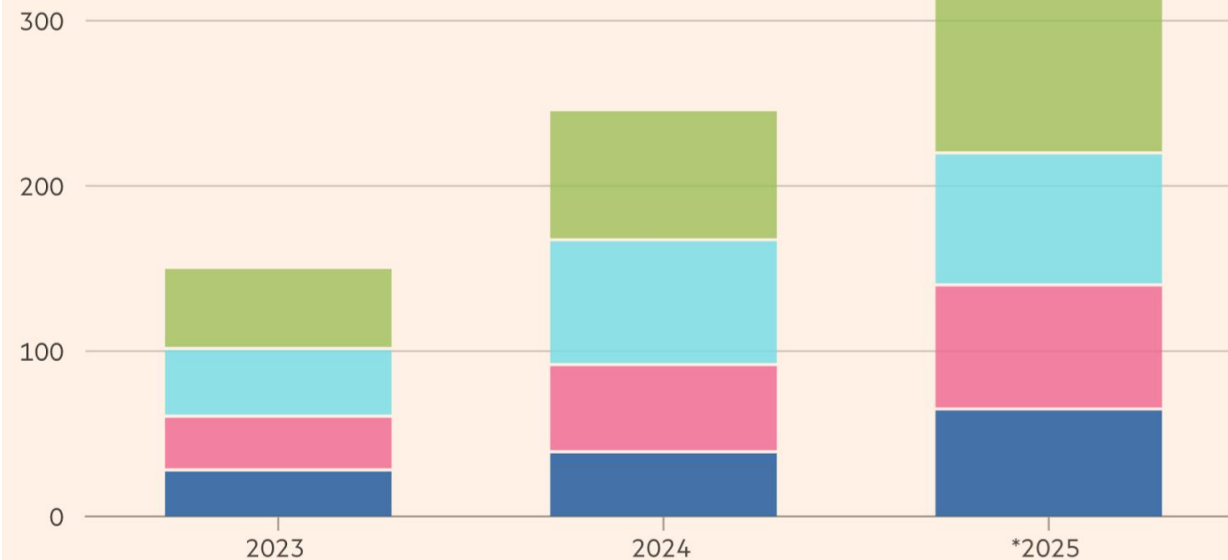
Source: U.S. Census Bureau



Big Tech's capex soars as AI investment accelerates

Capital expenditure (\$bn)

■ Meta ■ Google ■ Microsoft ■ Amazon

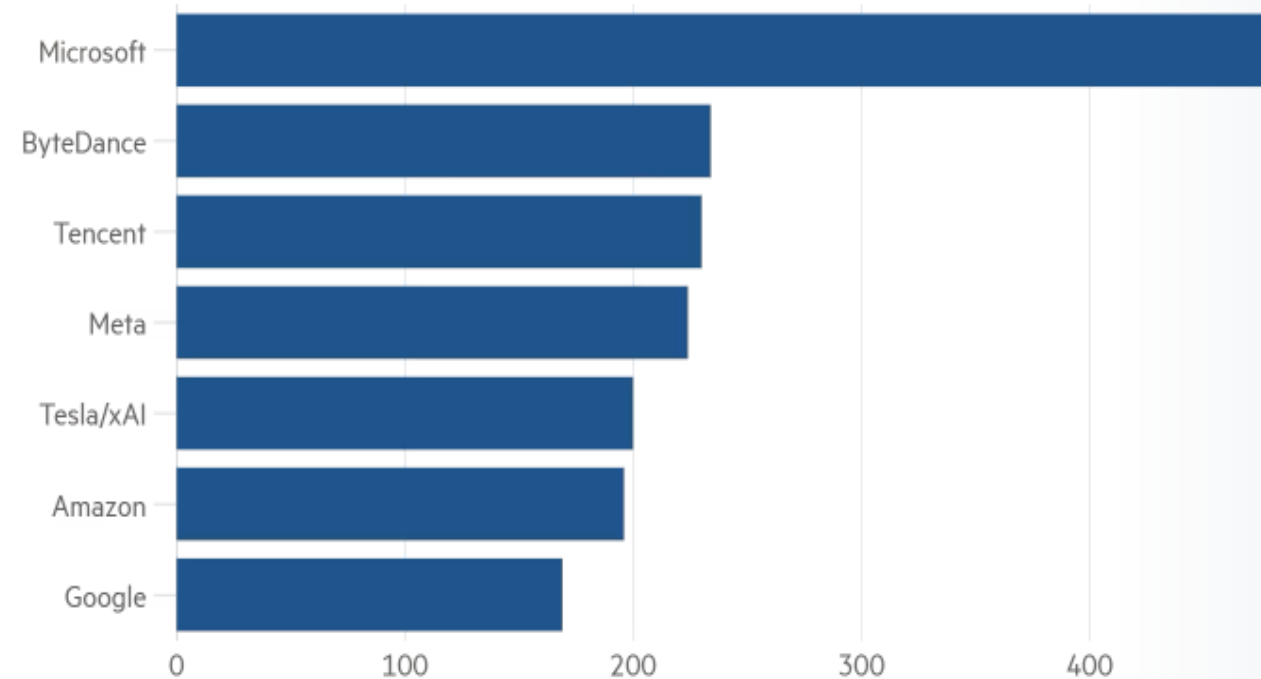


Source: Company reports and earning calls, FT calculations • The year refers to the fiscal year. Microsoft's fiscal year runs for the 12 months ending June 30, while the others align with the calendar year. *2025 data based on companies' forecasts.



Microsoft's spending on Nvidia's AI chips has far outstripped rivals'

2024 shipments of Nvidia Hopper GPUs (000)



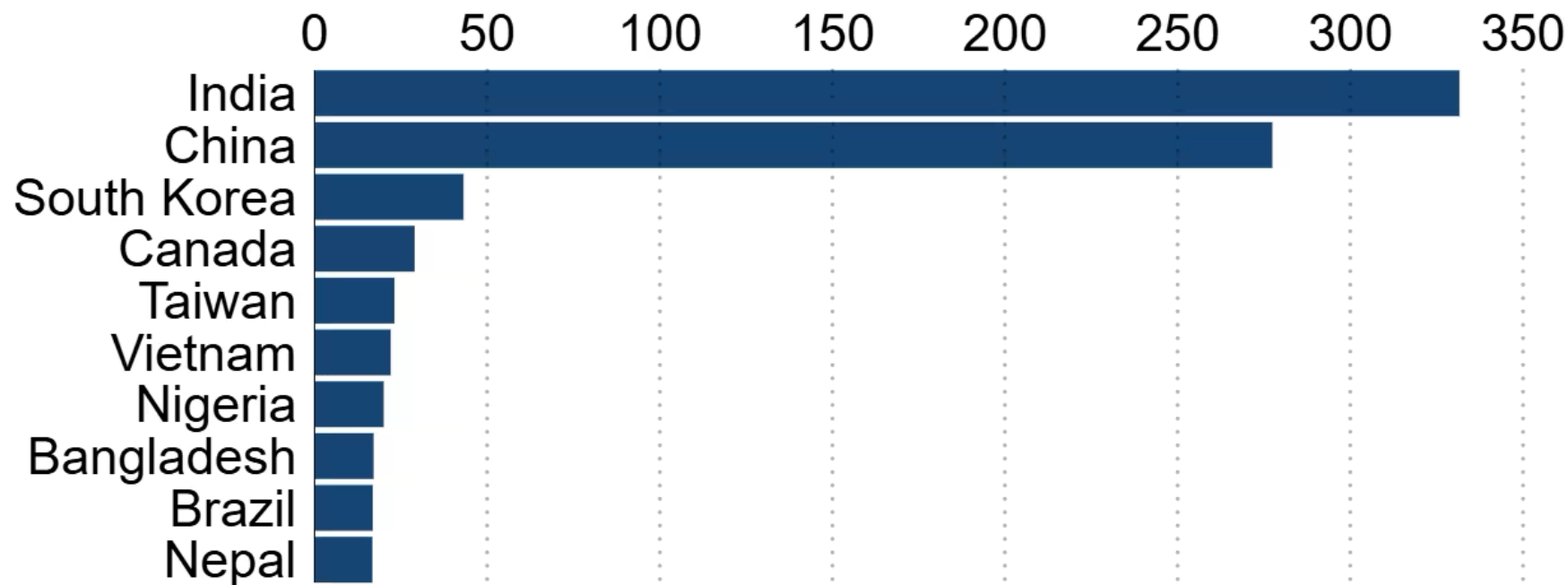
Nvidia's Hopper generation includes H100, H800, H20, H200

Source: Omdia



Top 10 sources of foreign students in U.S.

(2023-24 academic year, in thousands)



Source: International Institute of Education





GEOPOLITICA DELL'INTELLIGENZA ARTIFICIALE





Schneider Electric (1836)

Zeiss (1846)

Siemens (1847)

BASF (1865)

Linde (1879)

Air Liquide (1902)

Trumpf (1923)

ASML (1984)

ARM (1990, è di SoftBank)

DeepMind (2010, è di Google)