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**DIRECTORATE FOR FINANCIAL AND ENTERPRISE AFFAIRS  
COMPETITION COMMITTEE**

**Executive Summary of the Roundtable on Competition in Artificial Intelligence  
Infrastructure**

**Annex to the Summary of Record of the 147th meeting of the Competition Committee**

4 December 2025

This Executive Summary by the OECD Secretariat contains the key findings from the discussion of the Roundtable on Competition and AI Infrastructure held during the 147th meeting of the Competition Committee on 4 December 2025.

More information related to this discussion can be found at  
[www.oecd.org/en/events/2025/12/competition-in-artificial-intelligence-infrastructure.html](http://www.oecd.org/en/events/2025/12/competition-in-artificial-intelligence-infrastructure.html)

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## *Executive Summary of the Roundtable on Competition in Artificial Intelligence Infrastructure*

By the Secretariat<sup>1</sup>

On 4 December 2025, the Competition Committee held a roundtable on Competition in Artificial Intelligence Infrastructure. Taking into account the background note prepared by the OECD Secretariat, the written contributions, as well as the discussion by delegates and the interventions by the expert panellists, the following key points emerged:

### **1. Vertical integration, partnerships and investment links across the stack can generate efficiencies but also create risks of foreclosure or advantage accumulation**

The roundtable underlined a rise in arrangements involving integration between chip design, cloud services, model development and other layers. These include vertical mergers, strategic partnerships, long-term commitments and minority shareholdings. Such arrangements can improve coordination across layers, increase returns on research and development and stabilise supply. However, concerns were also identified. These include restricted or delayed access to critical inputs, differentiated access to new technologies, bundling across services and the alignment of incentives that can reduce rivalry.

Participants observed that access to compute has become a central lever of competitive advantage for downstream actors. This increases the relevance of agreements that determine how and when firms can obtain accelerators or specialised infrastructure. There was agreement that competition authorities may need to consider not only traditional vertical theories of harm but also how broader ecosystems develop when assessing these arrangements. Transparency around the conditions under which access is offered was seen as important for maintaining a contestable environment. Contributions also pointed to concerns about killer acquisitions and risks associated with minority crossholdings where these could soften rivalry or influence access conditions.

### **2. Ensuring interoperability and manageable switching costs is important for preserving the openness of AI infrastructure markets.**

The discussion highlighted that switching between providers at different levels of the AI stack can be complex. Technical constraints arise when development frameworks, accelerator software, data management systems or networking environments are optimised for specific hardware. Commercial factors such as long-term credits or data transfer charges may further contribute to lock-in.

Participants noted that switching can involve substantial recoding or reconfiguration and may require firms to acquire new technical skills. Once users adopt integrated environments, their ability to change providers may diminish over time. This poses risks for long-term contestability.

Interoperability measures, clarity over access conditions, and transparency regarding compatibility features were described as important safeguards. Some contributions noted that open-source options and transparent compatibility pathways can support portability and help assess any foreclosure incentives in practice. Participants expressed interest in approaches that support portability and reduce unnecessary technical or contractual

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<sup>1</sup> This Executive Summary does not necessarily represent the consensus view of the Competition Committee. It does, however, encapsulate key points from the discussion.

frictions. Maintaining diverse options for developers and users was viewed as essential for continued innovation.

### **3. Competition tools may need to account for innovation dynamics, rapid market evolution and expanding state intervention.**

Authorities noted that conventional indicators may not sufficiently capture competitive dynamics in fast-moving markets with high research and development intensity. Certain contributions emphasised the relevance of assessing innovation rivalry, the number and capability of alternative innovators, and the effects of transactions on incentives to invest. Participants also reflected on lessons from previous enforcement cases in adjacent hardware markets to inform timely and proportionate interventions.

Participants also discussed the usefulness of market studies for mapping emerging issues, understanding bottlenecks and informing advocacy. The conversation recognised that public intervention in semiconductor production, cloud expansion and related areas is increasing. This reinforces the importance of ensuring that such measures support, rather than distort, competitive conditions. The forward-looking discussion included potential pro-competitive measures such as investment in shared or public compute capacity and the careful design of state aid to avoid favouring single-vendor dependencies.”

Participants stressed that authorities should continue developing technical expertise to understand the interaction between hardware, software and energy demands and to ensure analytical approaches remain relevant as the technology evolves.

### **4. International cooperation and ongoing knowledge development are essential due to the global nature of AI infrastructure.**

The roundtable noted that many components of AI infrastructure are globally sourced. This creates interdependencies across jurisdictions and increases the value of cross-border cooperation. Sharing knowledge, analytical approaches and technical understanding can help authorities respond effectively to developments that occur beyond national boundaries. Participants also stressed the importance of maintaining regular dialogue to track changes in supply chains, identify emerging risks and support coherent approaches to competition analysis. The discussion concluded that ensuring AI infrastructure markets remain open and competitive will require sustained monitoring, coordinated action where appropriate and continued investment in institutional capacity.