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Europe's tech sovereignty: what's in it for Matrix?

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accessnow

Access Now defends and extends **the digital rights of people and communities at risk.**

100 staff

7 global regions
and officially registered in **4** countries



EU Tech Sovereignty Package

- European Technological Sovereignty Package.
- Published by the European Commission on June 3, 2026.
- Complements and supports the Apply AI Strategy.
- Four initiatives
 - Chips Act 2.0;
 - Cloud and AI Development Act (CADA);
 - EU Open Source Strategy;
 - Strategic Roadmap for Digitization and AI in Energy.



What is tech sovereignty?

- European Commission's definition: *"Tech sovereignty is Europe's ability to act independently in the digital world by developing and controlling key technologies, data, and infrastructure, while reducing reliance on non-EU providers."*
- According to the European Commission, *"tech sovereignty enables Europe to:*
 - *Strengthen its competitiveness, resilience, and security;*
 - *Ensure strategic autonomy in key digital technologies;*
 - *Support open and fair digital markets;*
 - *Protect citizens' rights and democratic processes in the on-line space;*
 - *Enable innovation and long-term technological leadership."*



Various meanings of “sovereignty”

- The Sovereign Internet Law in Russia is an informal name for a set of amendments to introduce Internet governance in Russia that enables:
 - surveillance on the Internet;
 - the isolation of Russia from the Internet.
- Sovereignty for whom?



Alternative terms to “tech sovereignty”

- Digital autonomy.
- Digital self-determination.



Europe's ability to act independently

- European Commission's definition: *“Tech sovereignty is **Europe's ability to act independently** in the digital world by developing and controlling key technologies, data, and infrastructure, while reducing reliance on non-EU providers.”*
- To what extent is it realistic to act independently?
- Realistically speaking, it should be more about managing dependencies.
 - Alternatives need to exist.
 - There must be a way how to switch between alternatives.



Greens/EFA political group's definition

- Greens/EFA political group's definition of tech sovereignty: *“European technological sovereignty should be understood as Europe’s ability to develop, provide, and maintain digital technologies required for people’s welfare, the public interest, and Europe’s economic development, as well as the ability to act and decide independently, and ensure that the market provides real consumer choices and the possibility to freely choose any specific technologies and solutions.”*



The current landscape of cloud & AI

- As summarized by the European Commission.
- *“characterized by a **pronounced dependence on a limited number of third-country providers**”*
- *“[Market] share of EU [cloud computing services] providers decreased from 29% in 2017 to 15% in 2022 and has remained stagnant since then.”*
- *“Currently, three non-EU hyperscalers control over 70% of the European cloud market share.”*
- These is one of the arguments that the European Commission officially uses to justify the proposal of the Cloud and AI Development Act (CADA).



CADA's objectives

- As presented by the European Commission, *“the proposal aims to:*
 - *increase computing capacity and AI developed and deployed in the EU through innovative and sustainable Cloud and AI technologies;*
 - *ensure attractive conditions for the deployment of sustainable and innovative computing capacity across the Union;*
 - *address concerns regarding data sovereignty and operational continuity of cloud and AI;*
 - *help protect public order by making the supply of cloud computing services more resilient, in particular in the public sector.”*



Data center capacities

- Member States shall designate data center acceleration zones.
- The aim is to triple data center capacities in the next five to seven years.
- 248 billion EUR to build it, according to European Commission's study.



Cloud computing sovereignty

- CADA establishes a Union cloud computing sovereignty framework.
- Four Union assurance levels defined by criteria.
 - Set the levels of 3rd country control and data localization.
 - Cloud computing service providers must meet the criteria in order to provide their cloud computing services to Union entities and public sector bodies.
- Central repository of cloud computing services.
- Public procurement rules.



EuroCloud Federation

- CADA establishes the European public sector cloud federation (EuroCloud Federation).
 - Open for the participation of Union entities and public sector bodies on a voluntary basis.
 - It shall facilitate the sharing of public center data center services and cloud computing services.
 - The European Commission shall establish a platform providing at least:
 - a catalogue providing information on available public sector data center services and cloud computing services;
 - a service platform for the exchange of orchestration of computing, storage, and network resources and services.
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Open Source

- Promoting open source solutions and open source first.
- EU Open Source Solutions Catalogue as a centralized catalogue to access software made available for reuse by Union entities and public sector bodies.



Sovereignty at the AI application layer

- Lovable
 - Swedish vibe coding start-up.
 - Let's you build a website or an app via an AI chat.
 - Closely tied to Anthropic's and Google's LLMs in the existing hyperscaler ecosystem.
 - Anthropic eventually creates an in-chat app builder.
- Reasonable economic decisions of individual market actors don't necessarily build a sovereignty strategy.



Cloud lock-in

- DeepL
 - Partnership with AWS.
- More demand for frontier AI may lead to more demand for proprietary LLMs and hyperscalers.



More data centers for the hyperscalers

- The Big Tech companies are major owners and operators of data centers in the Union.
- They are also massively renting data centers' capacities from co-location companies.
- According to the European Commission's impact assessment, data centers' capacities are often leased to the Big Tech.
- McKinsey's report projects is expected to account for 65% of the data center demand by 2028.
- Accelerating the expansion of data centers may lead to cementing the power of the existing hyperscalers.



Is Open Source European?

- The Open Source Strategy is not legally binding.
- The focus on “European” steers the attention away from Open Source.
- Uncertainty about what “tech sovereignty” actually means.



Clash with the deregulation agenda

- Another Commission's priority next to tech sovereignty is so-call simplification.
- The Commission delivers it via so-called Omnibuses across various legislative acts.
- As a matter of fact, it is no simplification. It is harmful deregulation.
- It removes or weakens provisions that protect people and businesses from Big Tech's abuse of power.
- Therefore, it is absolutely contradictory to the idea of tech sovereignty.



Conclusion

- The power of the hyperscalers throughout the stack is real.
- It creates dangerous dependencies for Europe.
- The Tech Sovereignty Package does not necessarily deliver a solution.
- On top of that, the deregulation omnibuses remove protections that were already adopted.
- AI first, more demand for frontier AI, more data centers don't imply less dependency on the existing hyperscalers. Quite the opposite. Sovereignty-washing.
- There is need for interoperable, decentralized, Open Source solutions that deliver agency over technology and our (digital) future. The Matrix community can be an advocate of that approach.

Good luck!



Questions?

Reading

- [Series: What Europe's AI Market Actually Looks Like | TechPolicy.Press](#)
- [EU's data centre expansion will fast-track profits and power for US Big Tech and investors - SOMO](#)

