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DIGITAL SOVEREIGNTY AND A NEW MULTILATERALISM FOR THE AI ERA

ABSTRACT

Artificial intelligence (AI) is transforming not only economies but the very nature of global power, reshaping sovereignty itself in the digital age. This policy brief examines how control over digital infrastructures – chips, cloud computing, data networks and algorithmic systems – has become the new determinant of geopolitical influence. As technological interdependence is increasingly weaponised, creating new vulnerabilities for states and unprecedented forms of digital dependency for societies, the need for a new multilateral digital order has never been more urgent. Drawing on the frameworks established by the United Nations through the Pact for the Future and the Global Digital Compact, this analysis argues that Europe can play a transformative role in building a shared digital civilisation rooted in democratic values, rights-based governance and sustainable development. Through the EuroStack vision[1] and deep cooperation with Global South partners, Europe has the opportunity to contribute to a fairer digital order built not on dependency but on reciprocity, trust and a shared commitment to treating AI, data and compute as global public goods.

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1.1 The digital stack as global power infrastructure

The 21st century has witnessed a fundamental transformation in the nature of sovereignty. Where once territorial boundaries, military capacity and trade relationships defined the contours of national power, today sovereignty is increasingly determined by who owns and governs the digital infrastructures that underpin modern societies. The chips that compute, the clouds that store collective knowledge, the networks that connect billions of people and the algorithms that shape everything from political discourse to climate planning – control over this digital stack now determines who sets the rules of the global order.

This transformation reflects a deeper shift in the material basis of power, what I have been calling the political economy of the digital stack,[2] a new regime in which technological infrastructures reorganise value, authority and geopolitical leverage. The semiconductor industry, concentrated in a handful of facilities primarily in Taiwan, South Korea and the Netherlands, has become perhaps the most strategically significant manufacturing sector in human history. Advanced chips are not merely components of consumer electronics; they are the substrate upon which artificial intelligence (AI) systems are trained and deployed, the foundation of modern military capabilities, and the enabling technology for virtually every aspect of digital infrastructure. Control over chip design, manufacturing and supply chains has accordingly become a matter of national security for major powers.

Cloud computing represents another critical layer of this digital stack. The vast majority of the world's cloud infrastructure is controlled by a small number of hyperscale providers, predominantly American in origin, whose data centres process and store an ever-growing share of global information. This concentration creates profound dependencies: governments, businesses and citizens increasingly rely on infrastructure they neither own nor control, subject to the jurisdiction and commercial decisions of foreign entities. The shift to cloud computing has been presented as a matter of efficiency and innovation, but it also represents a fundamental restructuring of information sovereignty.

The rise of what might be called *compute diplomacy* shows how digital infrastructure has become a central instrument of statecraft. Export controls, restrictions on access to computing power, and proprietary standards now function as tools of geopolitical leverage. This logic was formalised in *Pax Silica*, the Trump administration's December 2025 initiative to reorganise AI and semiconductor supply chains into a US-led alliance. Modelled on *Pax Americana* and *Pax Romana*, it brings together Japan, South Korea, Singapore, the Netherlands, the UK, Israel, the UAE, Qatar, and Australia to control critical minerals, energy, semiconductors, AI infrastructure, and data centres.

The European Union is relegated to "guest" status—a deliberate divide-and-rule strategy favouring bilateral deals over engagement with the EU as a bloc. As Jacob Helberg, Under Secretary for Economic Affairs and former Palantir executive, put it: *"If the 20th century ran on oil and steel, the 21st century runs on compute and the minerals that feed it."* This approach is reinforced by the US *Stargate* initiative, a $500 billion AI infrastructure programme announced after Trump's second inauguration, which explicitly ties frontier AI development to US-controlled chip ecosystems, keeping the most advanced capabilities anchored in American infrastructure.

China's Digital Silk Road, meanwhile, extends end-to-end digital supply chains and infrastructure across Asia, Africa, Latin America and even Europe, creating new patterns of technological dependency oriented toward Beijing.

These dynamics reveal a deeper trend that should concern all nations committed to maintaining their autonomy in an interconnected world: technological interdependence is being weaponised. The complex global supply chains that once seemed to guarantee

mutual benefit and shared prosperity have been revealed as vectors of vulnerability, creating new forms of leverage that can be exercised by those who control critical nodes in the network. States that once celebrated their integration into global technology markets now find themselves exposed to risks they had not anticipated and dependent on systems they cannot easily replace.

1.2 Weaponised interdependence and rising digital inequality

The weaponisation of technological interdependence operates through multiple channels. Control over standards, protocols and cloud infrastructure translates into leverage over states that have become dependent on these systems. A country that relies entirely on foreign cloud providers for its government services, healthcare systems and educational infrastructure has ceded a form of sovereignty that traditional international relations theory struggles to conceptualise. The ability to deny access to these services, extract data from them or shape their development according to foreign interests represents a new form of power that operates beneath the threshold of traditional conflict.

Equally concerning is the emergence of AI energy and compute inequality as a new dimension of the global development divide.[3] Training state-of-the-art AI models requires enormous computational resources and correspondingly massive energy consumption.[4] The infrastructure necessary for the frontier of AI development is concentrated in wealthy nations with access to capital, energy, data and technical expertise. Developing countries face a stark choice: accept dependent relationships with foreign providers or be excluded from the AI revolution entirely. Neither option is consistent with genuine self-determination.

The assumption that compute scarcity guarantees American dominance has, however, been challenged by China's DeepSeek, which in January 2025 demonstrated that algorithmic efficiency can partially compensate for hardware restrictions. DeepSeek's R1 model, trained for reportedly under $6 million in compute, triggered a market panic that erased $593 billion from Nvidia's market capitalisation in a single session. Washington's response was not to abandon control but to change tactics: in May 2025, the Commerce Department rescinded its global AI Diffusion Framework, pivoting from regulation to cartel logic – waivers, bilateral deals and supply-chain blocs. When rulemaking cannot keep pace with technological development, managed scarcity fills the gap.

Surveillance architectures present another dimension of this problem. Digital technologies developed primarily in the USA and China are increasingly exported as geopolitical tools, carrying with them embedded assumptions about governance, privacy and state-citizen relations. Countries that adopt these systems wholesale may inadvertently import governance models incompatible with their own values and institutional traditions. The spread of facial recognition systems, predictive policing algorithms and social monitoring technologies represents not merely a commercial transaction but a form of ideological diffusion with profound implications for democratic governance worldwide.[5]

The concentration of digital infrastructure also has significant implications for economic development. The platform economy has created unprecedented concentrations of wealth and power in the hands of a small number of technology companies, many of which have market capitalisations exceeding the GDP of most nations. These platforms extract value from local economies while often contributing little to local tax bases or employment. The data they collect from users worldwide is processed and monetised primarily for the benefit of shareholders in wealthy countries, creating new patterns of digital extraction that parallel historical patterns of resource extraction.

1.3 The UN's renewed multilateralism: Pact for the Future and Global Digital Compact

Recognition of these challenges has prompted renewed attention to multilateral approaches to digital governance. **The United Nation's 2024 Pact for the Future** and its accompanying **Global Digital Compact** represent the most significant recent efforts to articulate a shared global vision for the digital age. These frameworks acknowledge that the world cannot allow itself to fracture into rival techno-blocs, each operating according to its own rules and standards, with smaller nations forced to choose between competing hegemons.

The Global Digital Compact articulates several key principles that should guide the development of global digital governance: universal connectivity that ensures all people can access the benefits of digital technologies; equitable access to data and compute resources necessary for economic development and AI innovation; trustworthy AI developed and deployed according to principles of safety, transparency, and accountability; secure and interoperable digital public infrastructures that serve citizens rather than corporate interests; and the treatment of core digital systems and AI as global public goods available to all.

The most politically consequential follow-up process for global AI governance is the member-state-led initiative adopted by General Assembly Resolution A/RES/79/325. This resolution establishes a dual-track approach: (1) an annual UN member state global dialogue on AI governance to facilitate ongoing intergovernmental discussions; and (2) the establishment of an independent International Scientific Panel on AI to provide evidence-based assessments and recommendations. These mechanisms place AI governance firmly within the intergovernmental framework, ensuring that states retain primary responsibility for shaping global AI policy. The UN Secretary-General has also released a high-level advisory body report on "Governing AI for humanity,"[6] which provides additional perspectives on the challenges ahead.

The first **digital UN General Assembly** scheduled for 2025 represents a decisive moment to translate these principles into governance architectures capable of addressing the challenges of concentration, fragmentation and growing digital divides.[7] This gathering will test whether the international community can develop institutions and mechanisms that are adequate to govern technologies which are transforming every aspect of human society. Success will require not merely agreement on principles but concrete commitments to build the infrastructure, share the resources and establish the governance frameworks necessary for a more equitable digital future.

1.4 A progressive vision: Multilateral digital sovereignty

A progressive response to these challenges must begin with a reconceptualisation of digital sovereignty.[8] Rather than viewing sovereignty as a zero-sum competition in which one nation's digital autonomy necessarily comes at the expense of another's, we should understand sovereignty as something that can be enhanced through cooperation. Treating AI, data, compute and digital public infrastructure as global digital public goods[9] creates possibilities for mutual benefit that purely competitive approaches foreclose.

This vision requires a non-aligned, democratic model for global digital cooperation that resists the gravitational pull of existing techno-blocs. Rather than forcing countries to choose between American and Chinese digital ecosystems, a truly multilateral approach would create space for diverse developmental models, respecting the right of each nation to shape its own digital future while enabling cooperation on shared challenges. This is not a call for digital autarky, which is neither feasible nor desirable, but rather for forms of interdependence that enhance rather than undermine autonomy.

The ultimate goal should be a shared digital civilisation rather than competing techno-blocs. This civilisation would be characterised by interoperability, sustainability and fairness rather

than fragmentation, by standards developed through inclusive multilateral processes rather than imposed by dominant powers, by governance frameworks that protect environmental and human rights and promote accountability, and by the distribution of the benefits of digital technologies that reduce rather than exacerbate global inequality. Building such a civilisation is the defining challenge of our era.

2. The European digital way: Regulation, sovereign capacity and international responsibility

2.1 Europe's normative legacy in digital governance

Europe has established itself as a global standard-setter for digital rights through an ambitious programme of regulatory innovation. The General Data Protection Regulation (GDPR) pioneered a rights-based approach to data governance that has been influential worldwide, establishing principles of consent, purpose limitation and data minimisation that have shaped debates about privacy and surveillance far beyond European borders. The Digital Services Act (DSA) and Digital Markets Act (DMA) represent the most comprehensive efforts anywhere to regulate the platform economy, establishing obligations for transparency, accountability and fair competition that challenge the dominance of major technology companies.

The Data Act and the Data Governance Act extend Europe's digital regulatory framework into the emerging data economy, setting rules for data sharing, interoperability, and the development of data intermediaries that could offer real alternatives to the platform-dominated status quo. Most recently, the AI Act has established the world's first comprehensive framework for regulating artificial intelligence, introducing risk-based obligations and prohibiting practices deemed incompatible with fundamental rights.

Taken together, these measures embody a distinctive European approach to digital governance, one that places fundamental rights at its core, insists on democratic accountability, and treats emerging technologies as objects of proactive public governance rather than passive market outcomes. This approach stands in clear contrast both to the largely laissez-faire tradition of U.S. technology policy and to China's state-centric model. Europe's normative legacy demonstrates that democratic, rights-based governance of technology is not only possible, but capable of shaping digital innovation in ways that serve broader social interests.

Yet this model is now under sustained pressure. In December 2025, the United States imposed visa bans on Thierry Breton, the former EU Commissioner behind the Digital Services Act. Senator Marco Rubio labelled him the "mastermind" of European censorship; leaders of HateAid and the Global Disinformation Index were also targeted. The signal was unmistakable: regulate American technology platforms, and face retaliation.

2.2 The EuroStack: From vulnerability to capacity

Regulatory leadership alone, however, is insufficient. Europe's position has become increasingly fragile precisely because it has allowed itself to become deeply dependent on foreign digital infrastructure. Dependencies on foreign cloud services, chips, satellites and hyperscale compute are no longer simply economic risks. They have become strategic liabilities that constrain European diplomacy and weaken Europe's role in shaping global rules. The recent escalation in US tariffs and the intensification of the AI and cloud race, together with export control on chips and rare earths, have made these vulnerabilities impossible to ignore.

Denmark's recent decision to phase out Microsoft services for government use illustrates both the urgency and feasibility of this transition. As Danish Digital Minister Caroline Stage explained: "We must never make ourselves so dependent on so few that we can no longer act freely." The decision followed revelations that Microsoft had blocked the International Criminal Court prosecutor's email

account after US sanctions – demonstrating that a foreign company can sever access to critical services at Washington's behest. The US Cloud Act explicitly requires American companies to hand over data to the US government regardless of where it is stored.

The EuroStack[10] vision represents a comprehensive response to these vulnerabilities – a capacity-building strategy that addresses the full spectrum of digital infrastructure. This includes raw materials and chip alliances to secure access to the inputs necessary for semiconductor manufacturing; sovereign cloud and secure connectivity initiatives to reduce dependence on foreign providers; AI factories and green computing facilities to ensure European access to the computational resources necessary for AI development; trusted data spaces and data commons to enable the sharing of data for public benefit while protecting privacy and sovereignty; and open standards, interoperability and public digital infrastructure to create alternatives to proprietary systems.

The EuroStack is not about digital protectionism or autarky. It is about building the capacity necessary for genuine choice and genuine partnership. A Europe that controls its own digital infrastructure can engage with the world from a position of strength rather than dependence. It can offer genuine alternatives to partners who might otherwise face a binary choice between American and Chinese digital ecosystems. Most importantly, it can demonstrate that democratic societies can compete technologically while remaining true to their values.

2.3 What Europe can offer the world

Europe's significance lies not in projecting its model outward but in contributing capabilities that advance global digital equality. This distinction is crucial. The goal is not to create a European techno-bloc to rival American or Chinese ones, but to support a new multilateral digital order built on reciprocity and shared commitment to rights, trust, sustainability and democratic governance.

Europe can offer the world democratic digital governance frameworks that provide global reference points for rights-based, accountable and transparent digital ecosystems. The regulatory innovations described above – GDPR, the AI Act, DSA/DMA and data-space regulation – are not merely European rules but templates that other countries can adapt to their own circumstances. Interoperable digital public infrastructure, developed collaboratively with partners, can provide alternatives to proprietary systems that create lock-in and dependency. Open, secure and privacy-preserving digital identity systems; public payment infrastructure; and platforms for health and education represent concrete offerings that can advance the objectives of the Global Digital Compact.

Green by design and sovereign computing represents another distinctive European contribution.[11] Energy-efficient compute infrastructure[12] powered by renewable energy sources is crucial for Global South innovation and digital climate action. As AI development becomes increasingly energy-intensive, ensuring that this infrastructure is sustainable is not merely an environmental imperative but a developmental imperative. Countries that lack abundant fossil fuel resources should not be excluded from AI development because of energy constraints.

Open standards and trusted cloud environments that are GDPR-compliant, interoperable and decentralised protect sovereignty and avoid vendor lock-in. Mission-driven AI capacity to support climate adaptation, food security, health delivery, disaster preparedness and sustainable urban development demonstrates that AI can serve sustainable development goals rather than merely commercial interests. Skills, training and research partnerships build the human capital needed for an equitable digital transformation. Finally, a global coalition for digital rights and cyber-peace can embed transparency, accountability and non-weaponisation into global rules, providing the normative foundation for a more peaceful digital order.

3. Proposals for EU action toward a democratic global digital order

3.1 Bilateral and regional cooperation with Global South and democratic partners

To deliver on this vision, Europe must expand its alliances. A progressive digital multilateralism requires deep cooperation with India, Brazil, the African Union, ASEAN and Latin American partners – countries that are building sovereign digital capabilities through their own distinctive initiatives. These partnerships demonstrate that the future of digital governance will be plural, polycentric and anchored in diverse developmental models rather than dependent on any single power.

Cooperation with India should build on the remarkable success of India Stack, which has demonstrated how digital public infrastructure can serve hundreds of millions of people while remaining under national control. Collaboration on open-source governance and data trusteeship can advance shared interests in digital sovereignty while creating models that other countries can adapt. Partnership with Brazil should address, amongst other things, digital payments, building on the success of the Pix instant payment system, as well as democratic AI governance, digital commons, and the use of digital technologies for forest and climate monitoring.

Engagement with the African Union should support Smart Africa initiatives, expand connectivity across the continent, build cloud capacity, and establish green data corridors that link European and African data infrastructure in ways that benefit both regions. Cooperation with ASEAN and Latin America should focus on standards harmonisation and the development of trusted cloud alternatives to hyperscale providers. Small island states face unique vulnerabilities to climate change and could benefit from climate-AI applications and early warning systems developed in partnership with European institutions. Democratic partners, including Canada, Australia and Singapore, share European commitments to rights-based AI and interoperability and represent natural allies in building a coalition for a fairer digital order.

These partnerships should be supported by concrete tools: Global Europe and Global Gateway investment mechanisms can direct resources toward digital development priorities; EuroStack, AI and cloud partnerships can share European technological capabilities with partners; digital development missions can provide technical assistance and capacity building; circular semiconductor supply chains can create more resilient and sustainable production networks; and joint digital public infrastructure and public AI compute and AI laboratories can develop shared resources available to all partners.

3.2 Multilateral and mini-lateral action

Beyond bilateral partnerships, Europe should pursue ambitious agendas in multilateral and mini-lateral forums. Within the UN system, particularly through the Pact for the Future and the Global Digital Compact, Europe should advocate for global principles for AI accountability, transparency and inclusive democratic technology governance; compute accountability and reporting mechanisms that create transparency about who has access to the computational resources necessary for AI development; fundamental-rights-based digital governance that places human dignity at the centre of technology policy; digital commons and global digital public infrastructure architecture that establishes common foundations for cooperation on applications including digital identity, payments and data governance; and rights-based digital identity systems that protect privacy while enabling access to services.

In forums such as the G20, OECD, ITU, WTO and GPAI, Europe should work with like-minded partners to establish standards for cybersecurity, cross-border data flows and green computing; align AI safety regimes to ensure consistent protections across jurisdictions; secure affordable access to public compute for developing countries; advance public digital commons developed on principles

of interoperability, open source and security; support joint public AI development for sustainable development goals; and establish public compute-sharing arrangements for climate modelling, urban planning, education and health – initiatives that could take the form of public AI factories and Giga factories serving multiple countries, following the example of European High Performance Computing (EuroHPC).

3.3 Three strategic priorities

Three priorities should define a European strategy aligned with the Pact for the Future. Firstly, co-building digital public goods globally through joint programmes to develop open, interoperable, rights-preserving digital public infrastructure and sovereign cloud and compute capabilities. These programmes should prioritise least-developed countries and climate-vulnerable regions, ensuring that those most in need of digital transformation can access it on terms compatible with their sovereignty and development priorities.

Secondly, establishing shared norms and standards for global AI governance by strengthening the global dialogue on AI governance,[13] launched in the General Assembly in September 2025 (Resolution A/RES/79/325), and by advancing rights-based norms through the UN, ITU, G20, OECD and regional bodies. These norms should address algorithmic transparency, privacy protections, safety evaluations and compute accountability, creating a common framework within which AI development can proceed in ways that benefit humanity as a whole rather than merely the shareholders of technology companies.

Thirdly, building a global digital commons coalition – a new multilateral alliance of states committed to shared digital infrastructure, rights-respecting innovation and reciprocal capacity building. This coalition would bring together countries that reject the false choice between American and Chinese digital ecosystems and are willing to invest in building alternatives. Such a coalition could achieve collectively what no country can achieve alone: genuine digital sovereignty within a framework of cooperation and mutual benefit.

3.4 Operationalisation: Governance, instruments and financing

To move from vision to implementation, Europe requires a clear operational framework. This section outlines the governance structures, policy instruments and financing mechanisms necessary to realise the proposals set out above. These recommendations are designed to provide actionable guidance for political decisionmakers, particularly Members of the European Parliament and ministers responsible for digital policy, industrial strategy and international cooperation.

3.4.1 Governance architecture and institutional responsibilities

A coherent digital sovereignty strategy requires clear institutional leadership and coordination mechanisms. At the EU level, this should include establishing a dedicated Digital Sovereignty Coordination Unit within the European Commission to ensure alignment between internal capacity-building and external partnerships to coordinate digital diplomacy across all external relations; creating an interinstitutional Digital Sovereignty Task Force at the European Council level, with representation from member states' digital ministries and the European External Action Service; and establishing a European Digital Sovereignty and Cooperation Board, modelled on the European Semiconductor Board under the Chips Act, to coordinate investment priorities and monitor progress toward strategic autonomy goals.

At the member state level, national digital sovereignty strategies should be developed in alignment with the European framework, identifying national strengths, international cooperation and investment priorities within a common roadmap. National competence centres for semiconductors, AI and cybersecurity should be networked through EU coordination mechanisms to maximise synergies and avoid duplication.

3.4.2 Policy instruments and implementation mechanisms

The following specific instruments should be deployed or developed to operationalise the proposals in this policy brief. For bilateral and regional cooperation (Section 3.1), concrete mechanisms include digital partnership agreements with priority partners (India, Brazil, African Union, ASEAN), establishing mutual commitments on data governance, interoperability standards and joint infrastructure development; a dedicated EuroStack International Cooperation Programme, building on Global Gateway, to co-finance digital public infrastructure projects with partner countries; technology-sharing arrangements for open-source AI models, digital identity frameworks and data space architectures developed through EU programmes; and joint research and innovation facilities, including public AI laboratories and quantum computing, established in partner regions with co-investment from EU and partner-country sources.

For multilateral and mini-lateral action (Section 3.2), key initiatives should include a European proposal for a global AI governance framework to be tabled at the UN global dialogue on AI governance, covering algorithmic transparency, compute accountability and fundamental rights; a G20 initiative for a Digital Commons Charter establishing AI, data and digital public infrastructure as global public goods; a coordinated EU position within the ITU and OECD to advance interoperable standards on digital identity, data portability and green computing; a proposal for a Multilateral Compute Access Facility offering subsidised high-performance computing for developing countries, supporting climate modelling, health research, and education.

Finally, Europe should champion a Global Observatory for supply chain accountability – monitoring data centres, extractive industries, and the water and energy footprint of the AI ecosystem – grounded in environmental and social justice, and explicitly integrating Indigenous knowledge, land rights and representation in governance structures.

3.4.3 Financing framework for digital cooperation

Implementing Europe's digital cooperation agenda requires mobilising dedicated financial resources for international partnerships. The following outlines the primary funding sources available for digital cooperation with Global South and democratic partners.

The Global Gateway initiative[14] represents the EU's principal vehicle for digital cooperation financing, committing €300 billion in public and private investment for 2021-2027. Half of this amount (approximately €150 billion) is allocated to the Africa-Europe Investment Package. Key digital cooperation components include the EurAfrica Gateway Cable for submarine connectivity along the Atlantic coast; satellite connectivity through the European Secure Satellite Communications Programme, extending internet access to underserved regions; co-investment in green data centres and sovereign cloud infrastructure in partner countries; and digital skills and innovation hub partnerships supporting local capacity building. At the October 2025 Global Gateway Forum, Team Europe and South Africa announced a nearly €12 billion investment package, including digital connectivity components, demonstrating the scale of bilateral digital cooperation now possible.

The Neighbourhood, Development and International Cooperation Instrument (NDICI-Global Europe), with a budget of €79.5 billion for 2021-2027, provides the primary vehicle for Team Europe's digital development initiatives in partner countries.[15] This instrument can finance digital public infrastructure deployment, including digital identity and payment systems; technical assistance for regulatory capacity building aligned with EU digital governance frameworks; support for digital skills training and workforce development; and co-financing arrangements for joint AI research facilities and data space architectures.

For structured international partnerships, financing should be channelled through several mechanisms. Team Europe initiatives combine EU, member state

and European development finance institution resources for coordinated digital cooperation programmes. The European Investment Bank and European Bank for Reconstruction and Development can provide concessional lending for digital infrastructure projects in partner countries, meeting EU interoperability and governance standards. Co-investment arrangements with partner-country development banks, sovereign wealth funds and regional institutions such as the African Development Bank can leverage EU contributions for greater impact.[16]

Innovative financing mechanisms should also be explored, including public-private partnerships structured around public green AI compute, data sovereignty and interoperability principles, and blended finance facilities combining grants with commercial investment for sustainable digital infrastructure. Potential contributions from multilateral development banks, including the Asian Infrastructure Investment Bank and the Inter-American Development Bank, can complement EU resources in regions where these institutions have an established presence and expertise.

For the next Multiannual Financial Framework (2028-2034), digital cooperation financing should be explicitly prioritised within the proposed European Competitiveness Fund and successor instruments to NDICI-Global Europe, with dedicated budget lines for EuroStack international partnerships, digital public goods co-development and multilateral public AI compute access initiatives (including EuroHPC and the European network of AI factories).

3.4.4 Just transition safeguards: Raw materials, energy and planetary commons

Europe's digital sovereignty agenda cannot be divorced from its material basis. Semiconductors require critical raw materials, including cobalt, lithium, rare earths, copper and tantalum. Data centres demand vast quantities of energy and water. The infrastructure underpinning the EuroStack vision depends upon global supply chains that, if managed irresponsibly, risk replicating extractive colonial patterns that have historically exploited the Global South while externalising social and environmental costs. As the Friedrich-Ebert-Stiftung's analysis of the EU Critical Raw Materials Act demonstrates,[17] civil society organisations in Latin America and Africa have raised serious concerns about being positioned solely as raw materials suppliers for Europe's green and digital transitions, with consequent expansion of mining activities in fragile ecosystems and indigenous territories.

A planetary commons approach recognises that critical raw materials, freshwater systems, a stable climate and biodiversity are shared global inheritances, the governance of which requires collective responsibility across borders. Europe, representing approximately 6% of the world's population while consuming 25-30% of globally produced metals, bears particular responsibility to ensure its digital and green transitions do not simply displace ecological burdens onto communities least responsible for overconsumption and least equipped to bear its consequences. Digital sovereignty pursued through extractive dependency would represent a contradiction in terms – genuine strategic autonomy requires solidarity with producer countries and respect for planetary boundaries.

Indigenous peoples and local communities in raw-material-rich regions possess rights that Europe must actively protect rather than merely acknowledge. Europe's digital cooperation partnerships should explicitly require alignment with ILO Convention 169 on Indigenous and Tribal Peoples, the Escazú Agreement on environmental access rights, and the UN Declaration on the Rights of Indigenous Peoples. Strategic projects in partner countries should not proceed without genuine community engagement, and European financing should be conditional upon demonstrated compliance with these international frameworks.

Water merits particular attention as both a critical input for extraction and a key resource for indigenous communities. Lithium extraction in the Andean altiplano threatens aquifers upon which communities have depended for generations; copper mining in Chile and Peru depletes watersheds in some of the world's driest regions. Europe's digital cooperation

frameworks should require hydrological impact assessments before strategic project approval, recognise indigenous water rights and traditional governance systems, and treat water sovereignty as non-negotiable. Communities should strengthen their water security in the digital transition process.

Effective monitoring mechanisms are essential to ensure stated commitments translate into practice. Europe should establish, in partnership with Global South civil society and affected communities, independent observatories to track the social and environmental impacts of raw material extraction linked to digital and green technology supply chains. These observatories should monitor water consumption and contamination in mining regions (noting that 52% of global copper mines are located in areas of high water stress); energy sources powering extraction and processing operations; labour conditions, including the persistence of artisanal mining under hazardous circumstances; land use changes and deforestation; and the distribution of economic benefits between extracting communities, national governments and international corporations. The Corporate Sustainability Due Diligence Directive provides a legal foundation, but implementation must be robust and enforcement meaningful.

Europe's partnerships must genuinely support local value creation in producer countries rather than perpetuating the historical pattern in which the Global South exports raw materials while the Global North captures processing and manufacturing value. African nations have increasingly restricted mineral exports to encourage domestic processing – a legitimate assertion of economic sovereignty that Europe should support rather than resist. Digital cooperation partnerships should include concrete commitments to technology transfer, workforce development and co-investment in processing facilities within partner countries, ensuring that communities bearing the environmental costs of extraction also capture meaningful economic benefits. The EuroStack vision of digital public infrastructure should extend to supporting partner countries' own digital sovereignty aspirations.

Finally, a just transition requires confronting demand-side questions. The Critical Raw Materials Act's recycling targets (25% of strategic raw materials from recycled sources by 2030) represent a step forward. Europe should commit to reductions in primary raw material consumption through circular economy measures, extended product lifespans, design for repairability and ultimately a reconsideration of consumption patterns that treat perpetual growth in digital devices as inevitable. Ensuring technology serves genuine human needs should become an explicit principle guiding Europe's digital sovereignty strategy, reducing the material throughput required for a dignified digital future.

3.4.5 Immediate next steps for political decisionmakers

The following actions should be prioritised in the near term. Digital partnership agreements should be concluded with at least three priority partners, such as India, Brazil and one African regional partner. The EU should prepare a European proposal for a Global Digital Commons Framework to be tabled at the UN's global dialogue on AI governance. A Digital Sovereignty and Cooperation Programme should be established and made operational within the European Commission. Finally, a pilot Multilateral Public AI Compute Access Facility should be launched for climate-modelling applications, in partnership with at least five developing countries, potentially hosted at the newly created UN University on AI in Bologna, where Italy's AI Factory and the European Centre for Meteorology are located.

Concrete projects on sovereign cloud and public AI infrastructure should be operational in at least two partner regions. Interoperability arrangements should be established between European and partner countries on data spaces, digital identity and payment systems, following the example of Brazil's Pix and the EU's digital identity wallet. A formal digital commons coalition should be launched with founding member commitments from at least ten non-EU states.

4. Conclusion: Toward a shared digital civilisation

The stakes of the current moment could hardly be higher. In an age when platforms influence elections, cloud providers shape sovereignty and compute access defines developmental possibility, the alternative paths before us are starkly defined: a fragmented world governed by technological power blocs, in which smaller nations are forced to choose sides and digital inequality compounds existing injustices; or a shared digital civilisation rooted in democratic values and sustainable development, in which digital infrastructure serves human flourishing rather than extracting value for distant shareholders.

The digital order will define the world order of the 21st century. Europe must pair sovereignty with cooperation and solidarity, recognising that genuine autonomy in an interconnected world requires building relationships of reciprocity rather than dependence. Digital cooperation is not merely desirable but a condition for peace, security and sustainability. The challenges we face – climate change, pandemic preparedness, financial stability, decent working standards and many others – cannot be addressed without digital infrastructure that serves the common good.

A shared digital civilisation is possible; one grounded in democratic values, ecological responsibility and global equality. Building it will require sustained investment, patient diplomacy and genuine commitment to treating digital infrastructure as a global public good. It will require Europe to be both ambitious in its domestic capacity building and generous in its international partnerships. Most importantly, it will require recognition that the digital future is not predetermined by the interests of existing powers but can be shaped by collective action oriented toward shared values.

A progressive European strategy, anchored in real investment, global cooperation and commitment to digital public goods, can help shape this multilateral path. The EuroStack vision, properly implemented and linked to ambitious international partnerships, offers a concrete contribution toward a more just and sustainable digital order. The current continued dependence, dominance, fragmentation and inequality is not acceptable for Europe or for the world. The moment for digital cooperation is now.

5. Implementation challenges and pathways

5.1 Overcoming institutional fragmentation

Implementing a comprehensive digital sovereignty strategy will require Europe to overcome significant institutional fragmentation. Digital policy currently spans multiple Directorate-Generals within the European Commission, involves numerous member state agencies with varying levels of capacity and divergent priorities, and intersects with both domestic and foreign policy domains. Creating coherent action will require new mechanisms for coordination that do not currently exist.

The challenge is particularly acute at the interface between internal market development and external partnerships. Building sovereign capacity through EuroStack initiatives must be closely coordinated with international partnership programmes to avoid duplication, ensure compatibility and maximise the strategic impact of limited resources. This may require the establishment of dedicated coordination mechanisms, perhaps in the form of a high-level digital sovereignty task force at the European Council that brings together relevant actors across institutional boundaries.

Member states will also need to align their national digital strategies with European frameworks while retaining the flexibility necessary to address their specific circumstances. Some member states have significant existing capabilities in particular areas – whether semiconductor manufacturing, cloud infrastructure or AI research – that can be leveraged for broader European and international benefit. Others will require significant investment and capacity building before they can fully participate in EuroStack initiatives. Managing this heterogeneity

while maintaining a common strategic direction represents a significant governance challenge.

5.2 Financing the digital transition

The scale of investment required for genuine digital sovereignty is substantial. Building competitive semiconductor manufacturing capacity, developing sovereign cloud infrastructure at scale, establishing public AI training facilities and creating digital public infrastructure that can serve as alternatives to dominant platforms will require investments measured in hundreds of billions of euros over the coming decade. These investments must compete with other pressing demands on public resources, from defence and security to climate adaptation, environmental preservation and social welfare.

Financing this transition will require creative approaches that combine public investment with private capital while ensuring that the resulting infrastructure genuinely serves public interests. Traditional procurement models may be inadequate for developing infrastructure that must remain under public control while operating at commercial scale. New models of public-private partnership, perhaps drawing on the experience of mission-oriented innovation agencies and a new model of governance for digital commons may be necessary. The European Investment Bank and national development institutions will need to play central roles in mobilising patient capital for public digital infrastructure.

International partnerships and collaboration with private foundations can also contribute to financing the digital transition, though on terms that avoid creating new dependencies. Development finance institutions, multilateral development banks and bilateral cooperation programmes all represent potential sources of investment for digital infrastructure in partner countries. Ensuring that these investments align with principles of sovereignty, interoperability and sustainability rather than creating lock-in to monopolistic digital systems, will require careful attention to conditionality and governance.

5.3 Building technical capacity and talent

The AI revolution is redrawing the global division of labour more rapidly and profoundly than any technological shift since industrialisation. Within a decade, AI and automation will replace hundreds of millions of jobs worldwide, not only routine manufacturing and clerical work, but increasingly cognitive tasks once considered automation-proof. The question is not whether this transformation will occur but who will shape it, who will benefit and who will bear the costs. The world cannot build a digital sovereign and fair transition on a foundation of skills scarcity and brain drain to US technology giants offering compensation packages that public institutions cannot match.

For the global majority, the stakes are existential. Countries that positioned themselves as outsourcing destinations – call centres in the Philippines, business process operations in India, content moderation farms across the Global South – face wholesale disruption of development strategies built over decades. Meanwhile, the new jobs being created concentrate overwhelmingly in a handful of locations: Silicon Valley; a few Chinese technology hubs; and pockets of Europe. Without deliberate intervention, AI threatens to widen the global labour divide, creating a world of AI owners and AI subjects. Europe must reject this trajectory, both for its own workforce and in solidarity with partner countries, the development pathways of which are being upended.

Building genuine technical capacity requires rethinking education from the ground up. Primary and secondary curricula must develop computational thinking alongside critical analysis of AI systems and their societal implications. Universities need resources to conduct world-leading research and train specialists in semiconductor design, AI development, cybersecurity and digital infrastructure – but also in AI ethics, digital governance and the political economy of technology. Cooperation with UN institutions such as the newly created United Nations University on Big Data and AI in Bologna, and engagement with ITU and UNESCO capacity-building programmes, can amplify European efforts.

Immigration reform must attract global talent while developing domestic capacity, ensuring Europe is not permanently dependent on imported skills that can be poached by better-funded competitors.

Most fundamentally, Europe should champion a new international framework for the AI-era division of labour; one that distributes the gains from automation more equitably and supports workforce transitions globally. This means genuine technology transfer and joint capacity building. Partnerships should include joint AI research facilities located in partner countries, shared training programmes that build local capacity rather than extract talent and collaborative development of AI applications addressing local priorities. The goal is to build coalitions for a just transition that protect workers everywhere from bearing the costs of a transformation, the benefits of which flow primarily to capital.

5.4 Managing relations with major powers

Pursuing digital sovereignty will inevitably create tensions with the major technology powers, particularly the USA and China. Both countries have strong interests in maintaining the current structure of global digital infrastructure, which gives them significant advantages. American technology companies dominate global cloud markets, digital advertising, social media and AI infrastructure development. Chinese companies have made significant inroads in telecommunications infrastructure, e-commerce, Internet of things and smart cities, and AI diffusion across the industrial sector and public administration. Neither power is likely to welcome European efforts to reduce its dependence on their systems or to offer alternatives to Global South partners.

Managing these relationships will require diplomatic skill and strategic patience. Europe should be clear about its intentions and the values that drive its approach, while also recognising the importance of continued cooperation with both the USA and China on matters of shared concern. Climate change, pandemic preparedness, financial stability, global taxation, AI weapons and nuclear non-proliferation all require cooperation among major powers that could be complicated by digital decoupling. Finding ways to pursue digital sovereignty while maintaining productive relationships with major technology powers represents one of the central challenges of the coming years.

The transatlantic relationship demands particular honesty. The USA remains Europe's most important security ally and shares democratic values that distinguish both from authoritarian alternatives. Yet Europe must name clearly what it opposes: tech nationalism that weaponises export controls and investment screening for geopolitical dominance rather than genuine security; trade practices that shield American platforms from competition while demanding market access abroad; regulatory frameworks that permit mass data extraction by private monopolies while criminalising equivalent conduct by foreign actors; and an economic model in which a handful of corporations capture the gains from digital transformation while externalising costs onto workers, communities and democracies worldwide. The Trump-era tariff wars showed how quickly alliance solidarity can give way to mercantilist reflexes, while the unchecked dominance of U.S. technology platforms confirms that supremacy—not real partnership—remains the underlying logic.

Against this backdrop, the EU–US trade accommodation commits Europe to large-scale, largely asymmetric economic concessions: estimated purchases of around $40 billion in advanced Nvidia AI chips, up to $750 billion in U.S. energy products over time, and hundreds of billions in anticipated European investment in American strategic sectors, including defense. While often framed as trade normalisation, this effectively trades strategic autonomy for tariff relief in a world where trade barriers have become a permanent instrument of statecraft.

This shift also reflects a deeper erosion of trust. According to ECFR polling from January 2026, analysed by Ivan Krastev, only 16% of EU citizens now view the United States as an ally, while

majorities in South Africa, Brazil, and India see China as either an ally or a necessary partner. As Krastev notes, "Trump was polarising domestically but depolarising internationally. China became another name for multipolarity."

Europe should cooperate with the United States and China where interests genuinely align—on global AI governance, cybersecurity, and limiting monopolistic dominance and authoritarian surveillance exports—while building autonomous capacity and offering Global South partners alternatives to a digital order designed to entrench existing hierarchies. Solidarity with democratic allies cannot mean acquiescence to monopolistic extraction.

6. Final reflections: The democratic imperative

The argument for digital sovereignty is ultimately an argument for democratic self-determination in the digital age. As more and more of social, economic, and political life migrates to digital platforms and depends on digital infrastructure, the question of who controls that infrastructure becomes a question about the very possibility of democratic governance. A society that depends entirely on foreign-controlled infrastructure cannot fully govern itself; a world in which a handful of platforms mediate public discourse and shape elections cannot be a democratic world.

This democratic imperative distinguishes the European approach from both American and Chinese alternatives. The American model, despite emerging from a democratic society, has produced unprecedented concentrations of private power with limited accountability to democratic governance. The Chinese model subordinates digital development to state control in ways that are incompatible with fundamental rights and political pluralism. Europe's contribution lies in demonstrating that a third way is possible: digital development that is innovative and competitive while remaining subject to democratic governance and respectful of fundamental rights.

Success in this endeavour will have implications far beyond Europe's borders. If Europe can demonstrate that digital sovereignty is achievable within a framework of democratic governance, it will offer hope to countries around the world that are struggling to maintain autonomy in an increasingly digital global order. If it fails, the world may indeed fracture into competing techno-blocs, with authoritarian models gaining ground as democratic alternatives prove unable to compete. The stakes could not be higher, and the time for decisive action is now.

Building a shared digital civilisation rooted in democratic values, ecological sustainability and global equality represents perhaps the greatest governance challenge of our time. It requires reimagining international cooperation for the digital age, developing new institutions and mechanisms that can govern technologies transforming every aspect of human life, and mobilising the political will and resources necessary to implement this vision. Europe, with its distinctive combination of regulatory leadership, commitment to fundamental rights and capacity for international partnership, is uniquely positioned to contribute to this endeavour.

ENDNOTES

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