

Europe's Digital Sovereignty

A Technology Stack that empowers Europe and its people

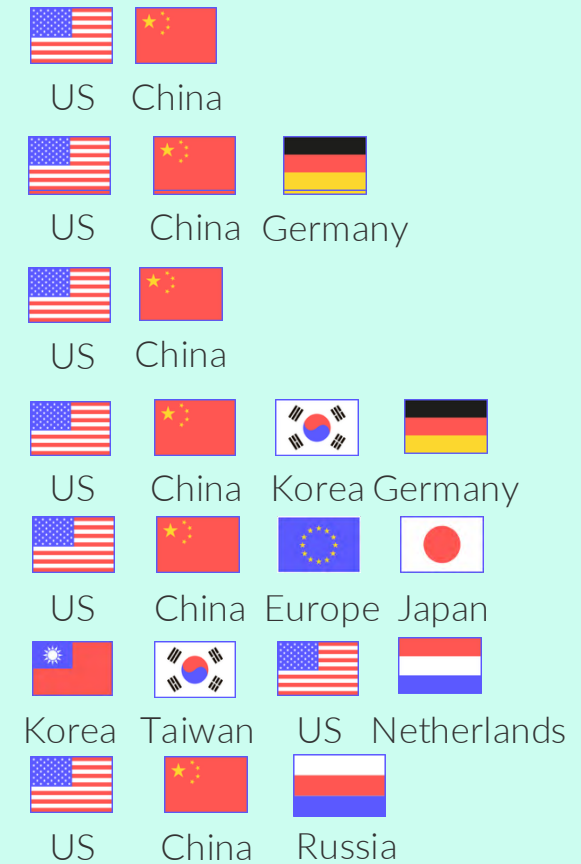
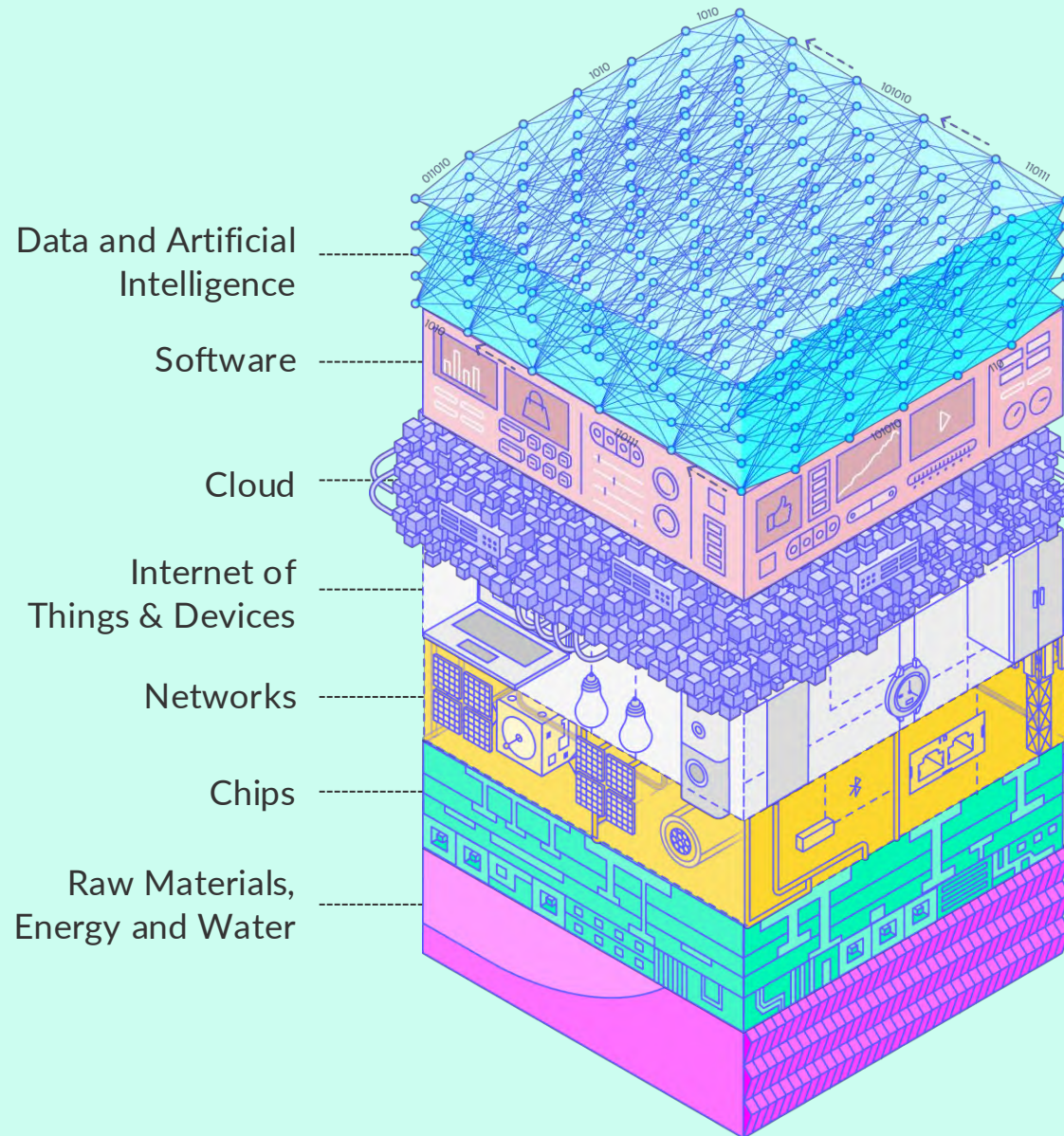
Francesca Bria

Arbeit.digital, Vienna, 2026

<https://www.euro-stack.info>

euro-stack.info

The Stack is the supply chain architecture of modern power and wealth in the 21st century

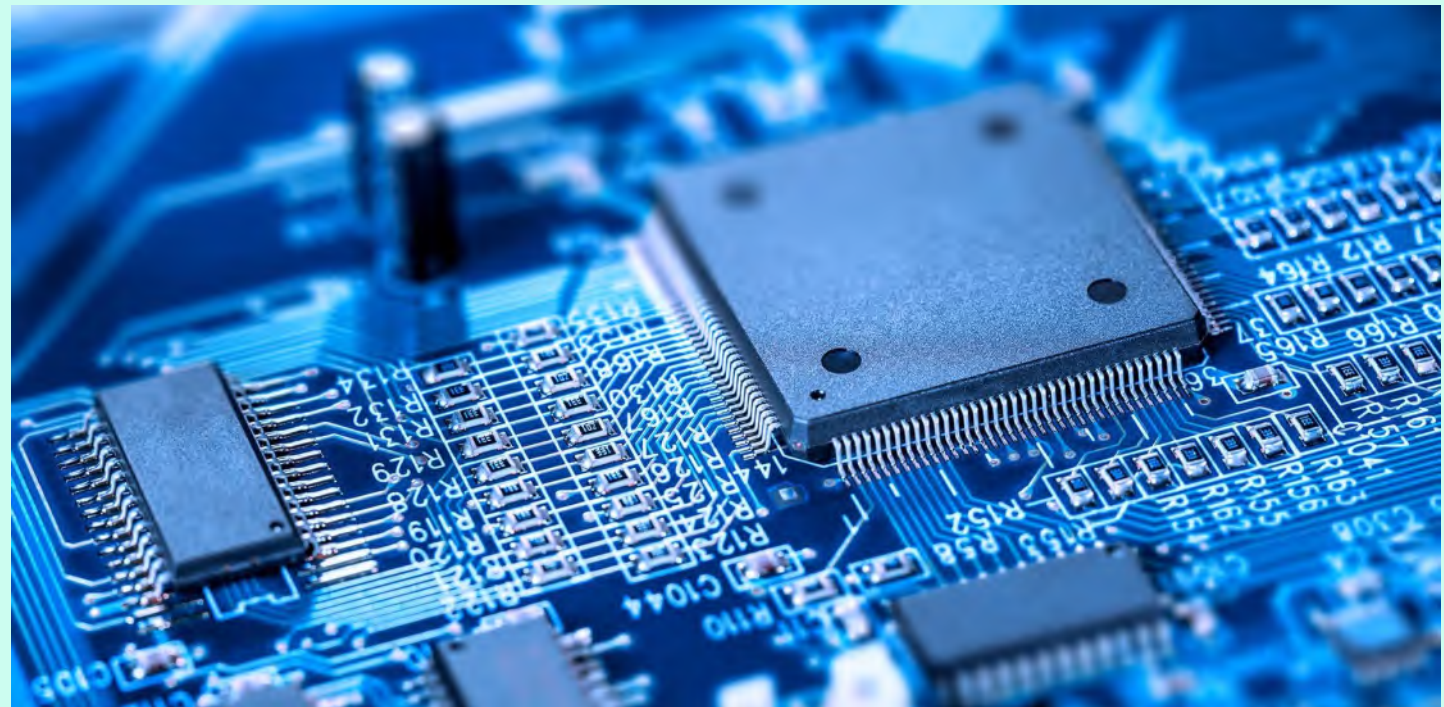


DIGITAL SOVEREIGNTY AS STRATEGIC NECESSITY

A new techno-political order.
The wars in Ukraine and the Middle East, weaponization of supply chains, trade wars, export controls, geopolitical turmoil, tech oligarchy...

Europe cannot digitalise its society on infrastructures it does not control.

Digital sovereignty is Europe's answer .

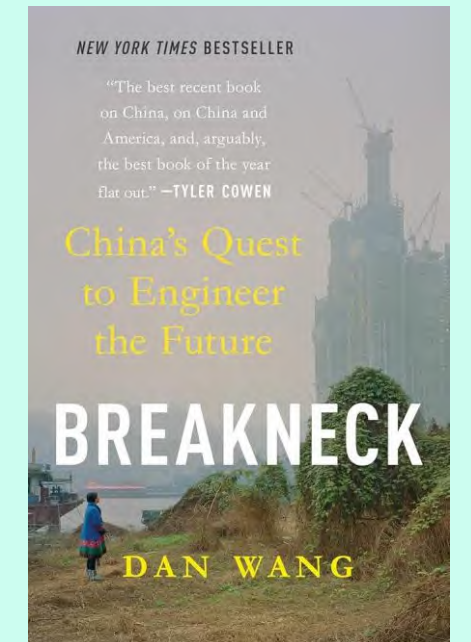
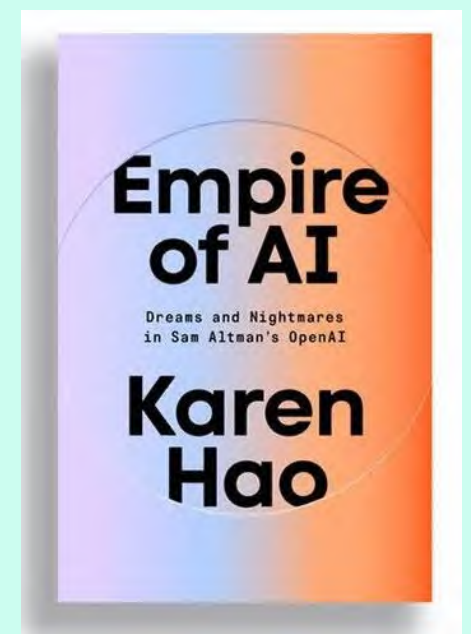


**KEY TECHNOLOGICAL TRENDS
WITH MAJOR (GEO)POLITICAL
IMPLICATIONS:**

**THE GREAT POWER RACE FOR
DIGITAL SUPREMACY.
PAX SILICA vs DIGITAL SILK
ROAD.**

**NEW COLD WAR OR NEW
MULTILATERALISM?**

**EUROPE CAN'T REMAIN A PAWN
BETWEEN TWO EMPIRES.**



RARE EARTH, RAW MATERIALS SUPPLY CHAINS VULNERABILITY



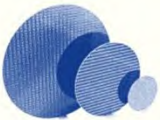
vibrating technology in phones = tungsten



electric vehicles = lithium, cobalt and nickel



wind turbines = boron



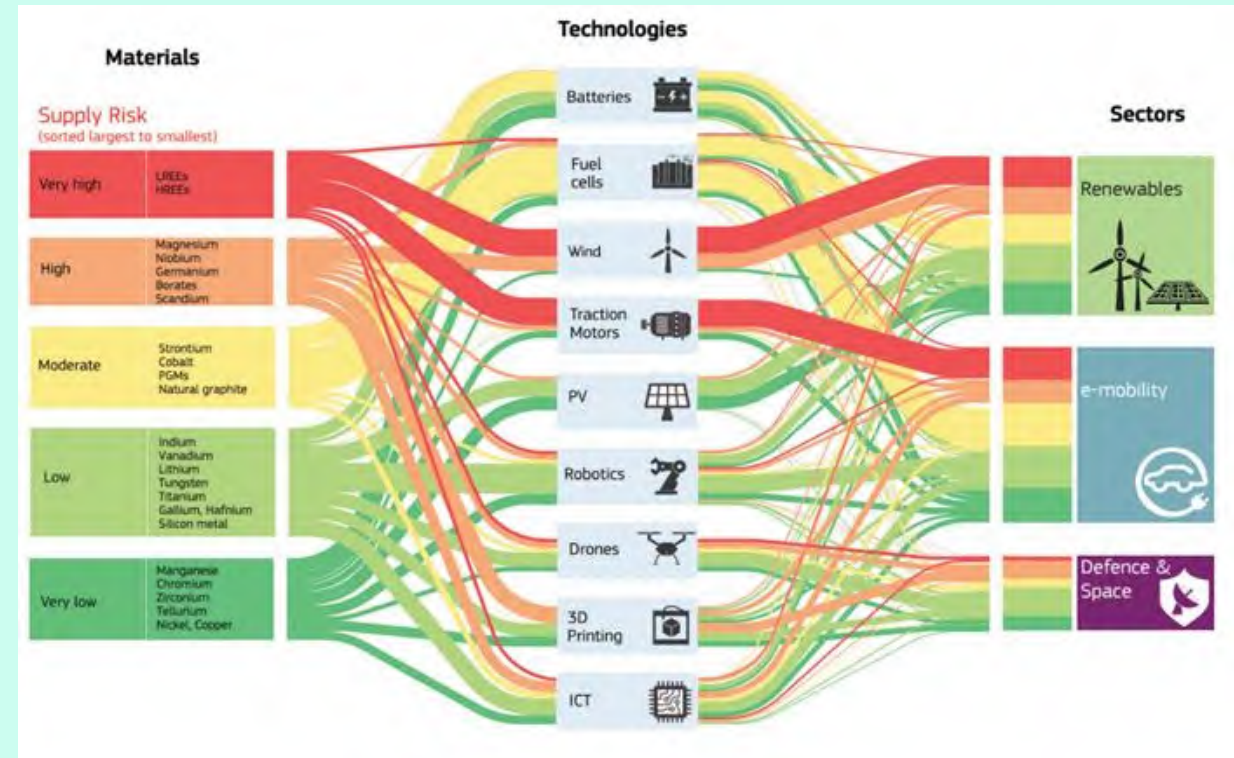
semiconductors = silicon metal



manufacture of glass and production of fertilisers for plant growth = borates

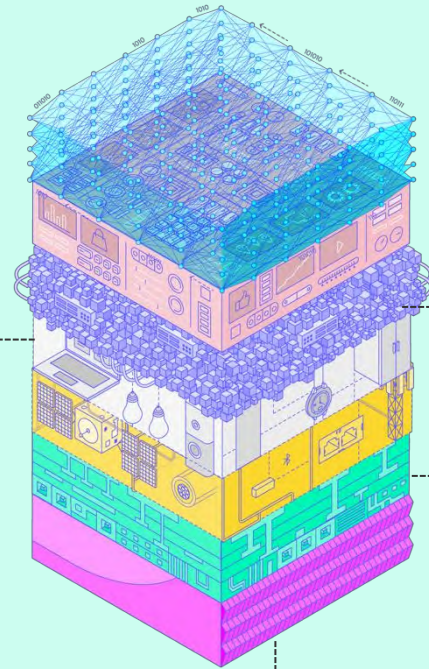


building and flying aeroplanes = magnesium and scandium

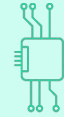
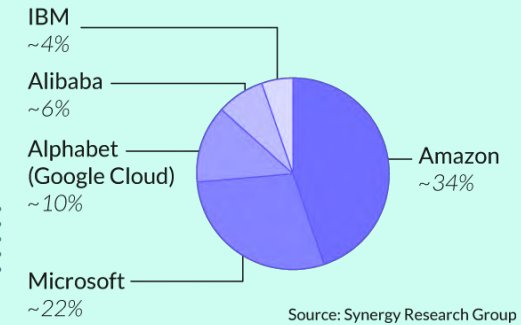


Europe's Innovation Gap is a sovereignty deficit

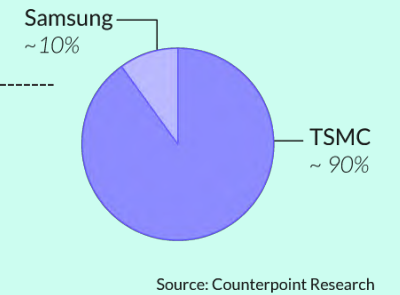
80% of EU digital tech is imported.
 70% of EU cloud is non-European
 4% of global AI training happens in Europe
 10% of chip manufacturing capacity
 300bln of European savings leave for US capital markets



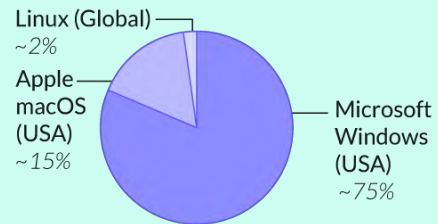
Cloud Infrastructure market,
Percentage distribution



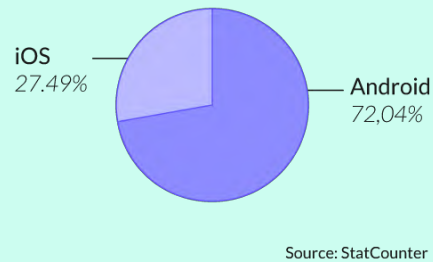
Advanced nodes manufacturing market,
Percentage distribution



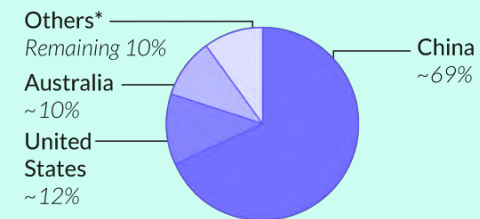
OS Desktop market,
Percentage distribution



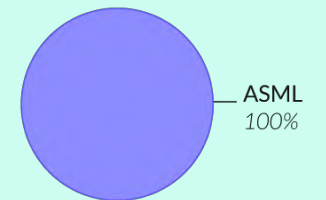
Global Mobile Operating System
Percentage distribution



Global Rare Earth Elements market,
Percentage distribution



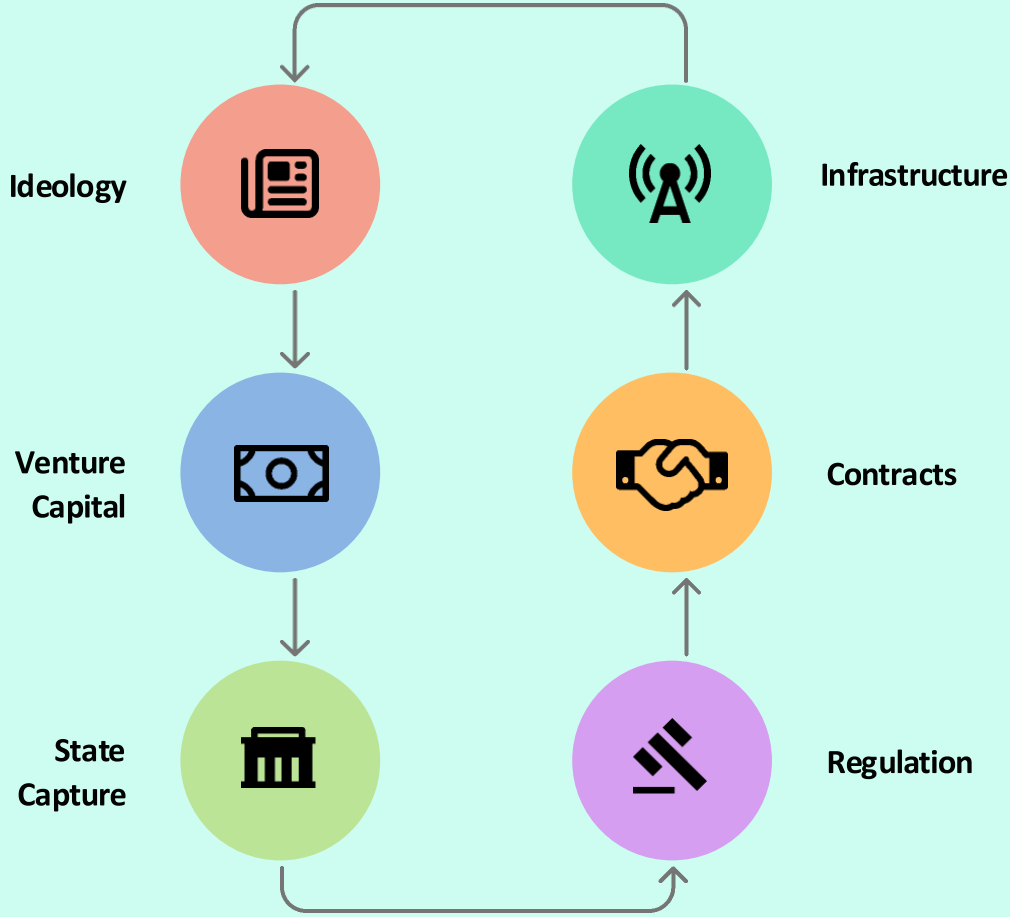
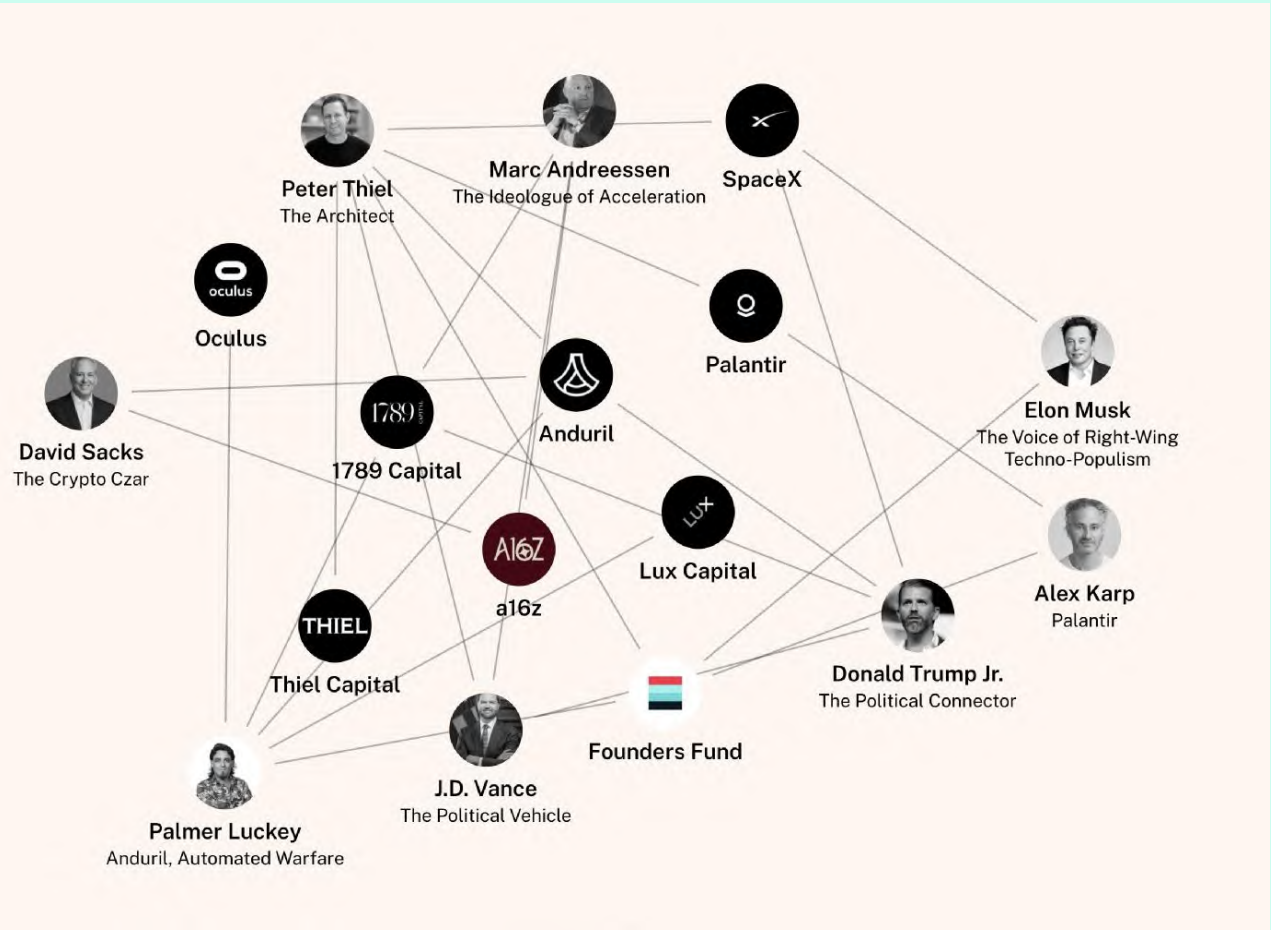
EUV Lithography equipment market,
Percentage distribution



The Authoritarian Stack

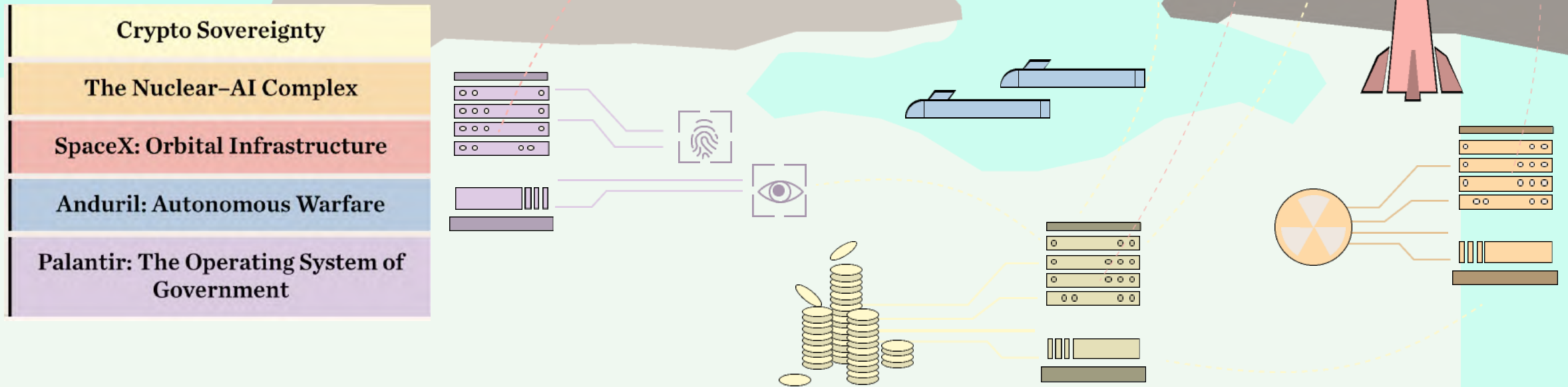
Tech Billionaires Are Building a Post-Democratic System

authoritarian-stack.info



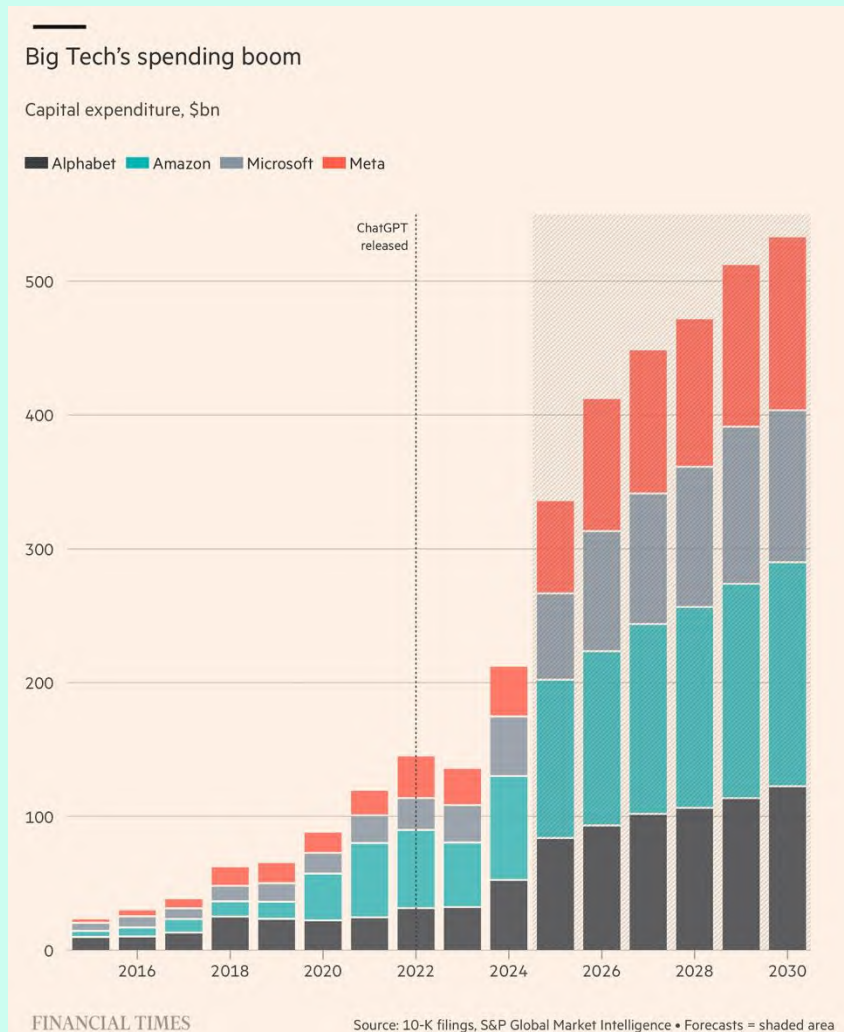
The Stack: Five Domains of Privatized Sovereignty

Critical state infrastructures are being privatized across five domains—data, defense, space, energy, and money



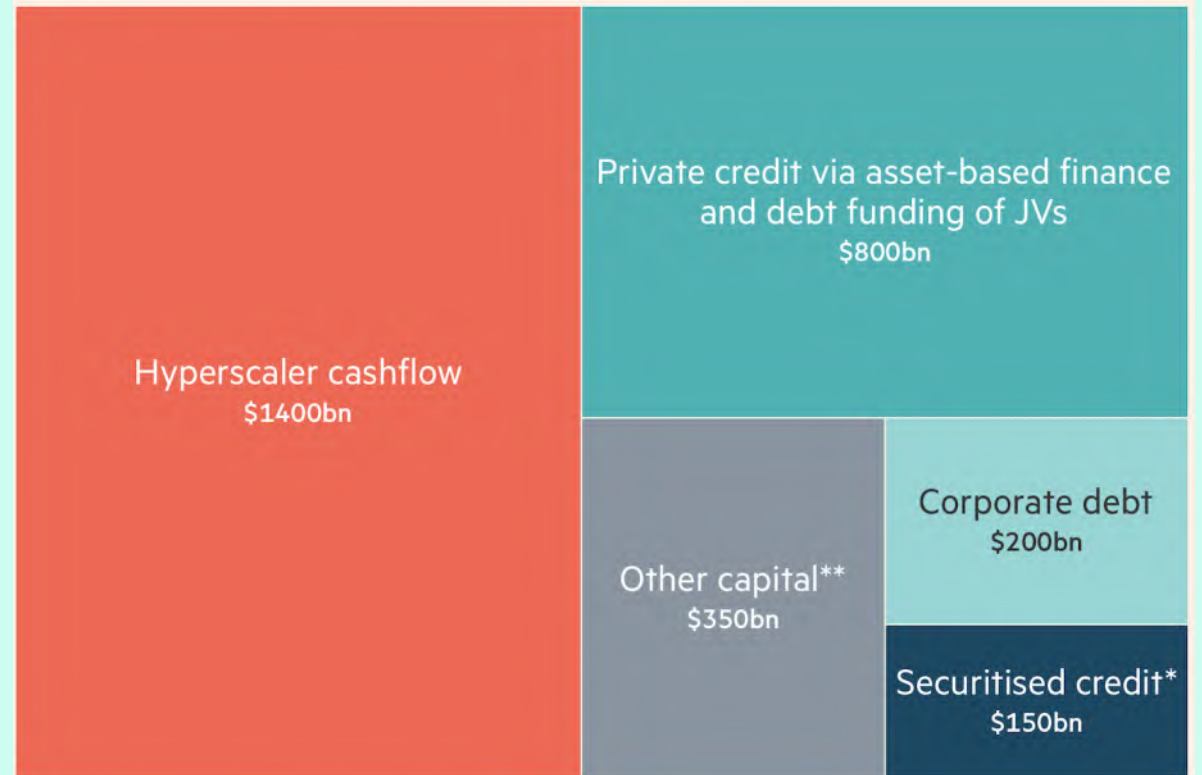
AI, COMPUTE SUPREMACY AND THE FUTURE OF WORK

Power, land, chips: bottlenecks become gold mines



Hyperscalers will fund only half of the \$2.9tn of future AI infrastructure

Main financing paths for global data centre spend (2025-2028)



FINANCIAL TIMES

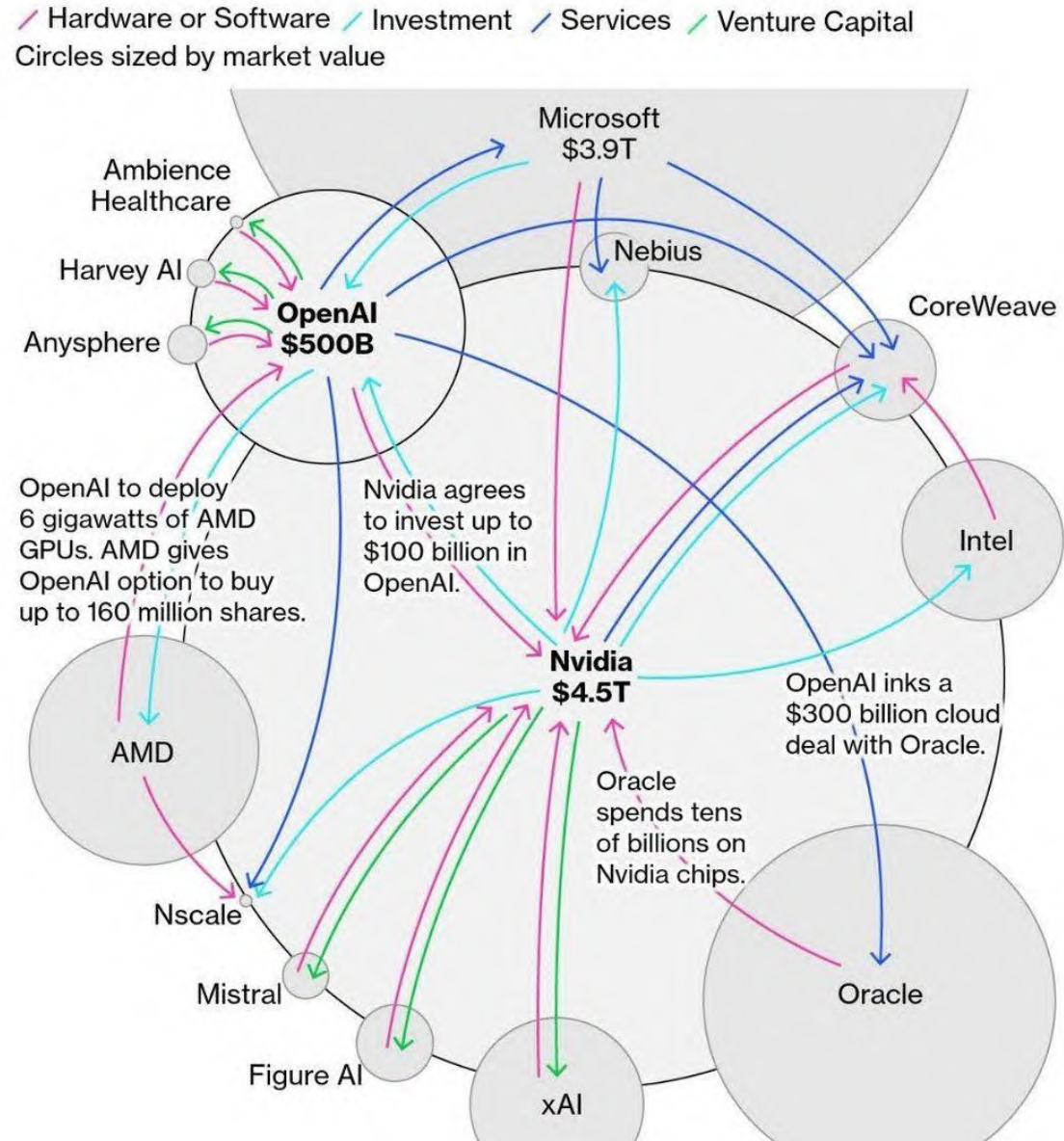
Source: Morgan Stanley Research • *Asset-backed securities, commercial mortgage-backed securities / ** Private equity, venture capital and sovereign wealth funds

AI BOOM OR BUBBLE? WHO PAYS?

What is the political economy of AI?

\$3tn AI building boom.
What is it doing to work?

Power, land, chips, mines,
data centres, declining
labour share: bottlenecks
become gold mines





Artificial intelligence

Added

Booming AI demand threatens global electricity supply

An Amazon Web Services data center
Scalzo/EPA-EFE

Tech chiefs warn that power-hungry data centres are a bottleneck in developing artificial intelligence

"Pro-Worker AI" as technology that expands human capabilities and increases the market value of expertise

Misaligned incentives and a "pro-automation ideology"

Policy shifts, needed including tax code reform and targeted investments in health care and education, to redirect AI development

The image shows a screenshot of the National Bureau of Economic Research (NBER) website. At the top left is the NBER logo with the text 'NATIONAL BUREAU of ECONOMIC RESEARCH'. To the right are a search icon and a hamburger menu icon. Below the logo is a breadcrumb trail: '< Working Papers'. The main title of the paper is 'Building Pro-Worker Artificial Intelligence' in a large, bold, black serif font. Below the title, the authors are listed as 'Daron Acemoglu, David Autor & Simon Johnson' in a smaller, bold, dark red font. Underneath the authors are social media sharing icons for X, LinkedIn, Facebook, Twitter, Instagram, Email, and Print. A horizontal line separates the title and authors from the metadata. The metadata includes 'WORKING PAPER 34854', 'DOI 10.3386/w34854', and 'ISSUE DATE February 2026'.

NBER | NATIONAL BUREAU of ECONOMIC RESEARCH

< Working Papers

Building Pro-Worker Artificial Intelligence

Daron Acemoglu, David Autor & Simon Johnson

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WORKING PAPER 34854

DOI 10.3386/w34854

ISSUE DATE February 2026



The direction of
AI is a political
choice

*If your labour trains a
model worth billions,
you deserve more than
precarity and
surveillance in return.*

FROM REGULATION TO CAPABILITY: BUILD AND BUY EUROPEAN

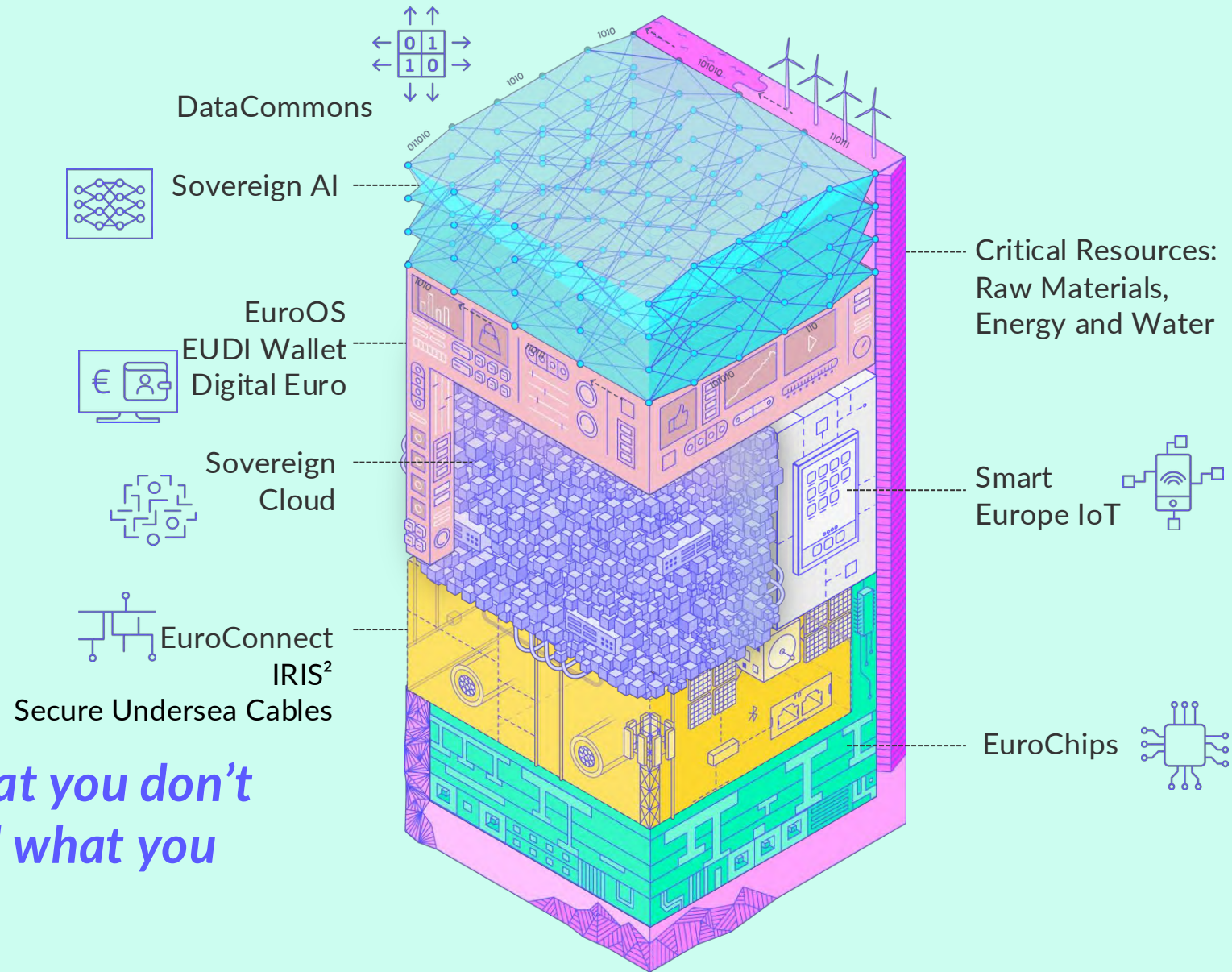
Europe spends €2.6 trillion a year on public procurement. Less than 10% goes to European digital firms. We are financing our own dependency.



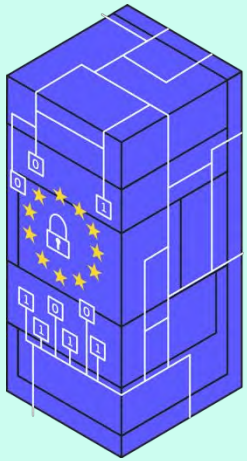
Building the EuroStack

Build European
Buy European
Because it's better!

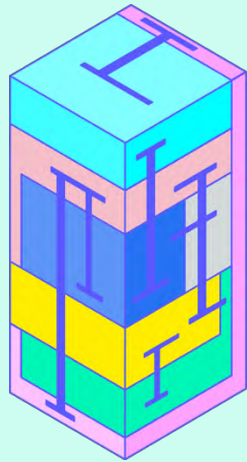
You cannot regulate what you don't own. You cannot defend what you don't control.



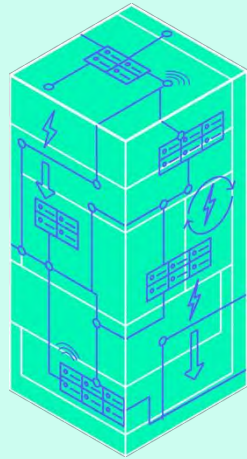
Core Principles that Make it European- Interoperable Europe- Share & Reuse. Building Digital Public Infrastructure of a Sovereign Europe



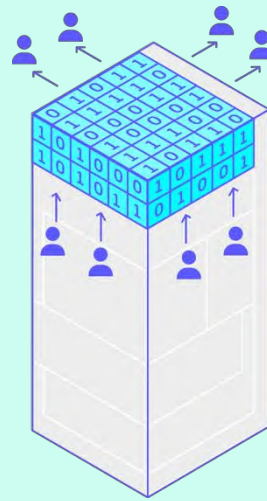
Sovereignty and Security



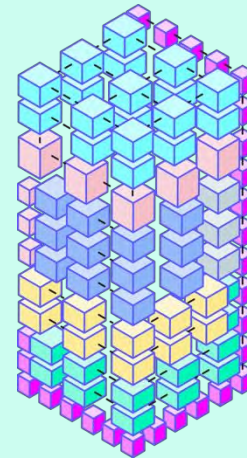
Open Source and Interoperability



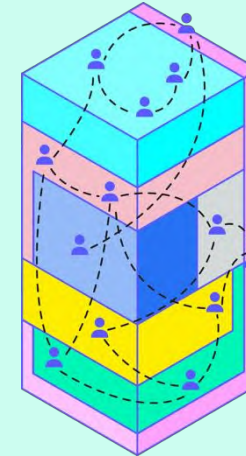
Climate alignment



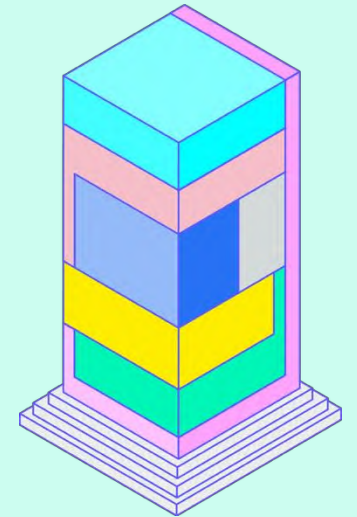
Data as a common good



Decentralisation



Inclusive governance



Democracy first

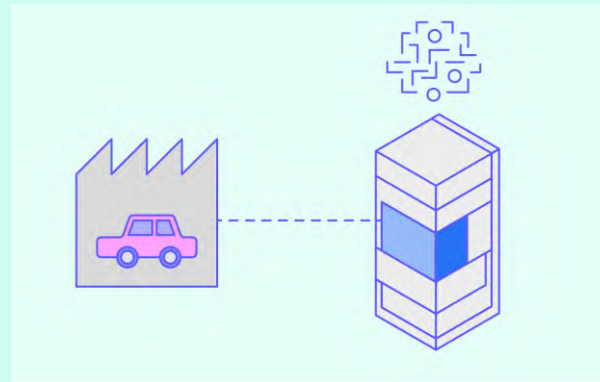
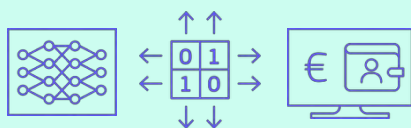
Aligning supply and demand across the digital stack.

Europe's advantage: High quality data, clean energy, strong Research & innovation/deep tech ecosystem, strong industrial sectors, efficient public service.

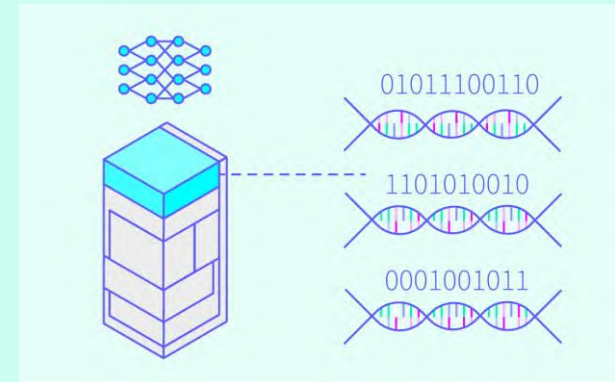
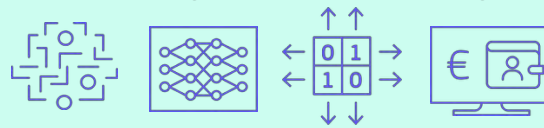
Developing interoperable scalable solutions for European States



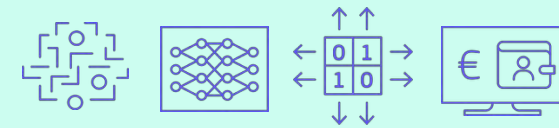
Citizen services



Clean Energy and manufacturing



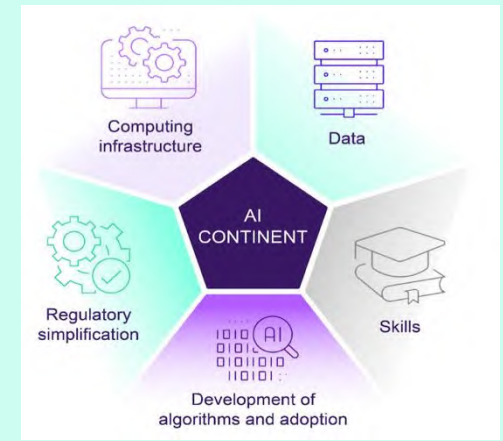
Precision medicine





Apply AI strategy

The future of European competitiveness



A DIGITAL INDUSTRIAL POLICY FOR EU STRATEGIC AUTONOMY: SECURITY, COMPETITIVENESS DEMOCRACY

Chips, Sovereign Cloud, AI Stack, Quantum, 6G and 5G, Connectivity, Satellites & Space, Energy & Critical Materials, Defense.



10 ACTIONS FOR DIGITAL SOVEREIGNTY

1. “Buy European” target: 50% by 2030

Public procurement drives scale, not foreign hyperscale monopolies.

2. Sovereign Tech Fund — €100bn

Finance EuroStack infrastructure and deep tech with scale.

3. Apply AI Flagships

Health AI, Industrial AI for SMEs, and democratic media platforms.

4. Green Sovereign Compute

AI-ready EuroHPC corridors powered by clean energy

5. Strategic stockpiles of raw materials

Aligned with Global Gateway partnerships and recycling.

6. IRIS² Secure Connectivity

Maritime + Arctic testbeds — Denmark leads.

7. Dual-use acceleration for defense and security

Drones, secure comms, integrated defence.

8. Single scale-up regime

One contract → 27 markets.

9. 75% AI diffusion in public services by 2030

Trustworthy, made-in-Europe solutions only.

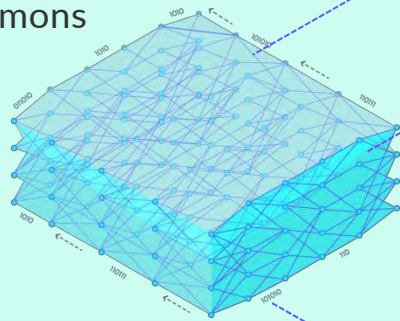
10. Digital Autonomy Index

Linking funding and procurement.

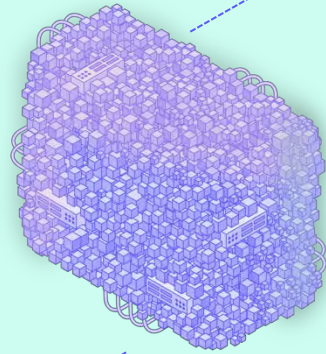
This is Europe's Independence Moment!

A SOVEREIGN
DIGITAL FUTURE
DESIGNED AND
GOVERNED
BY EUROPE, FOR EUROPE.

DataCommons



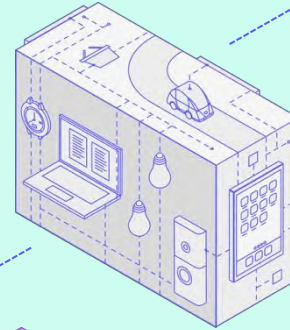
Sovereign
Cloud



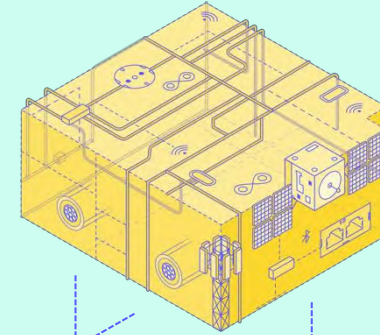
Sovereign AI
EuroHPC
AI Giga Factories



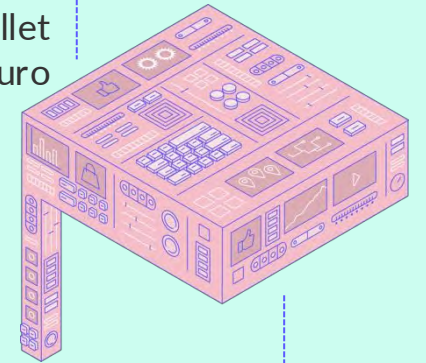
Smart Euro IoT



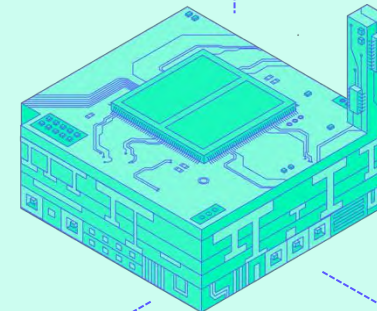
EuroConnect



EuroOS
Digital id Wallet
Digital Euro



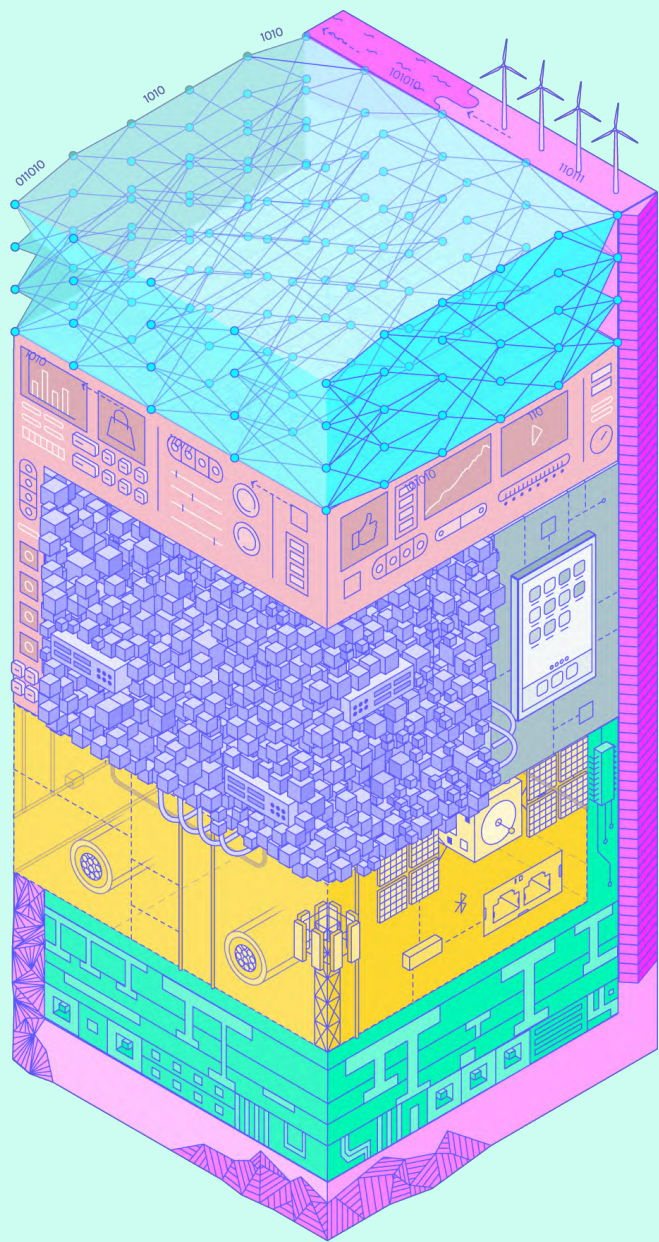
EuroChips



DIGITAL UNION TO SECURE DEMOCRACY

Because in the 21st century, if you don't control your digital infrastructure, you don't control your future.

It is the right time to advance a sovereign model of innovation, which guarantees our strategic autonomy and competitiveness, full democratic participation of citizens and workers, that protects the environment, our data, and the fundamental rights of people.



THANKS!

Francesca Bria – francescabria.com