Tech Sovereignty Package: Key takeaways and next steps

NGI Commons Webinar

Webinar Report | 22 June 2026, 13.00-14.30 CEST | online

Introduction and Context

On 22nd June, the NGI Commons project organised a webinar entitled "Europe's Tech Sovereignty Package: Key takeaways and next steps. The webinar brought together policymakers and experts digital commons advocates to discuss the newly announced Tech Sovereignty Package. This package represents the European Union's most ambitious strategic response to the structural digital dependencies that place Europe in a subordinate position relative to non-EU technology providers.

Dr **Monique Calisti**, CEO of Martel Innovate and NGI Commons coordinator, opened the session by framing the urgency: digital commons have been elevated from cost-effective alternatives to the strategic foundation required for Europe's long-term economic resilience, industrial competitiveness, and security, particularly given the current tense geopolitical environment.

The package was published three weeks prior to this webinar, and while its full details extend beyond the scope of a single session, the webinar focused on the dimensions most relevant to the NGI Commons community: Open Source software, open hardware, digital commons governance, and procurement policy.

Gemma Carolillo, Deputy Head of Future Internet Unit at DG CONNECT, European Commission, began the webinar with a keynote introduction, explaining that her presentation would focus on the key elements of the Open Source Strategy and introduced the definition of "tech sovereignty".

The Tech Sovereignty Package – Overview

"This does not imply closing the door to international partners; rather, it is about ensuring that the EU has the ability to choose and adopt the solutions that best meet its needs."
Gemma Carolillo, Deputy Head of Future Internet Unit at DG CONNECT, European Commission.

Definition of Technological Sovereignty

The European Commission defines technological sovereignty as the capacity of the European Union to develop, build, and scale its own infrastructure in critical areas, including software as digital infrastructure and to boost homegrown innovation capacity in industrial sectors. This vision is explicitly non-isolationist: it does not mean self-sufficiency across the entire technology stack, but rather the capacity to be independent in areas where independence is strategically necessary, and to freely choose the solutions adopted across the digital stack.

Key Components of the Package

The Tech Sovereignty Package is an interconnected set of legislative and strategic initiatives:

Chips Act 2.0: Builds on the first Chips Act with a stronger focus on demand-side measures to boost the EU semiconductor ecosystem, recognising that capacity alone is insufficient without demand generation, design capability, and an end-to-end supply chain.

Cloud and AI Development Act (CADA): An anticipated regulation seeking to boost the development and adoption of EU cloud and AI, while providing a framework for risk assessment. CADA targets procurement practices, market concentration, and the multi-cloud strategy for public authorities.

EU Open Source Strategy: The first-ever external Open Source strategy of the European Commission, a landmark shift from previous internal-only strategies, repositioning Open Source as a public policy tool for sovereignty, security, and competitiveness.

Strategic Roadmap for Digitalisation and AI: A roadmap for the digitalisation and AI in the energy sector, underpinning the sustainability dimension of the package and acknowledging that AI and cloud demands place significant pressure on energy systems and infrastructure.

EU Open Source Strategy: Deep Dive

Strategic Rationale

Gemma Carolillo stated that the Commission's current perspective on the Open Source Strategy is centered on sovereignty, security, and competitiveness: “*We do not consider it as a simple development model but as a public policy tool”,* pursued Gemma.

With the strategy, we take a holistic approach. *“our intention is to work with the community, the Member States(...), coordinated efforts*” The EU Open Source Strategy represents a fundamental reframing. Rather than viewing Open Source purely as a development model or a cost-effective alternative, the Commission now treats it as a public policy instrument - given that Open Source is highly pervasive in critical digital infrastructure and that the EU faces a structural dependency on non-EU providers for most of its IT stack.

Europe's Open Source strength is substantial: the EU counts an estimated 3 million Open Source contributors and approximately 500 for-profit Open Source companies. The strategy seeks to turn this capability into a strategic resource through a holistic, collaborative approach involving Open Source communities, Member States, private sector, and civil society.

Four Strategic Pillars

The strategy is organised around four objectives:

EU Tech Sovereign Stack: Adopting and scaling existing Open Source solutions, leveraging EU networks and instruments (e.g., the NGI Internet Stack), and ensuring Open Source is the default reference framework in key policy implementations such as the EU Digital Identity Wallet.

Vibrant Open Source Ecosystem: Addressing skills, project stewardship, security maintenance (including a new maintenance instrument for long-term funding of critical Open Source components), and the cybersecurity challenges that have historically limited Open Source adoption in critical contexts.

Public Administration: Reinforcing Commission-wide Open Source capacity, embedding openness and sovereignty by design in all EU investments, and developing procurement guidelines for public authorities — directly addressing one of the most persistent barriers to Open Source penetration in the public sector.

Standards and Outreach: Integrating Open Source into standard-setting bodies and building international partnerships, confirming that this strategy is about informed independence, not isolationism.

Supply-Side and Demand-Side Measures

The strategy adopts a balanced approach: supply-side measures ensure development, maintenance, and quality of Open Source solutions; demand-side measures stimulate adoption of existing solutions and incentivise creation of new ones. The European Commission has invested approximately €800 million in Open Source in the past and intends to make coordinated, targeted efforts going forward with a proposed budget envelope of €2 billion over seven years.

Giovanni Rimassa, Chief Innovation Officer at Martel Innovate, highlighted positive progress across the field and explored the significance of Digital Commons and Open Source initiatives as both community-driven resources and strategic assets for industry innovation and competitiveness.*"It is clear that the Tech Sovereignty Package unfolded against a challenging and complex situation that touches economic, social and geopolitical aspects."*

Giovanni noted that the Tech Sovereignty Package is highly ambitious, and that its ultimate effectiveness can only be assessed through implementation and practical experience. Nevertheless, three aspects are particularly encouraging:

A cooperative approach grounded in community engagement. The package recognises Digital Commons and Open Source not only as community-owned assets but also as key drivers of industrial competitiveness and economic prosperity, with industry often playing a leading role in their development and adoption.

A strong connection between software Digital Commons and physical digital infrastructure. The initiative extends beyond an Open Source Strategy to encompass critical areas such as semiconductors, energy, cloud infrastructure, and AI. In this context, concepts such as the computing continuum, the 3C Network Strategy, and the Open Internet Stack are especially relevant.

A balanced conception of sovereignty that remains open and outward-looking. The Open Source Strategy aligns technological sovereignty with openness, avoiding protectionist or isolationist tendencies. At the same time, it focuses on internal transformation by influencing public procurement practices and positioning the public sector as an anchor customer for Open Source solutions.

Cloud and AI Development Act (CADA) : NGI Commons Policy building blocks

Five Key Wins Identified by NGI Commons

Zuzanna Warso, Director of Research at Open Future Foundation, **partner of the NGI Commons initiative** presented an assessment of CADA against the recommendations published in the NGI Commons project reports. Five significant alignments were identified>

#	Win	Detail
1	**Open Source First**	Article 41 mandates Member States to take necessary measures to encourage Open Source uptake — a clear policy win, though language strength remains under discussion.
2	**Non-Price Procurement Criteria**	Introduction of a 'Union added value' award criteria allowing procurement decisions to move beyond lowest-price logic.
3	**Institutional Capacity**	CADA proposes a Network of Open Source Programme Offices (OSPOs), creating the institutional infrastructure to operationalise Open Source adoption.
4	**Multi-Vendor Strategies**	Recitals recognise the need for multi-vendor and multi-cloud strategies in public procurement, based on context-specific risk assessment.
5	**Monitoring and Enforcement**	Member States must monitor cloud and AI procurement; the Commission must track the market share of EU providers as a key success indicator.

Gaps and Remaining Challenges

Two significant gaps were identified where NGI Commons recommendations were not fully addressed:

Bundling and Vertical Integration: The challenge of cloud providers cross-subsidising between infrastructure, platform, and software layers to lock in customers with artificially low prices was not directly addressed. The proposal to require separately purchasable layers to expose such cross-subsidisation was not included in CADA. Whether CADA is the appropriate legal instrument for this remains debated, but the structural issue persists.

Transparency for IT Intermediaries: IT consultancies that channel procurement decisions towards specific cloud providers, often through undisclosed revenue-sharing or incentive arrangements, are not addressed. Without transparency obligations on intermediaries, demand-side structural lock-in may persist even if supply-side alternatives are available and technically superior.

Expert Panel Discussion: Key Debates and Perspectives

Chips Act 2.0 and Open Hardware - Semiconductor Sovereignty

Andrea Gallo, CEO of RISC-V International, highlighted the key improvement in Chips Act 2.0: the shift from a pure capacity focus to a full supply chain perspective.

The Chips Act 1.0 focused on advanced manufacturing capacity and lithography nodes. However, capacity without demand, without chip design capability, and without an ecosystem of companies to fill those fabs is insufficient.

This is addressed by the Chips Act 2.0 through:

Demand generation: Through CADA and the broader cloud and AI development framework.

Supply chain strengthening: through Operational Objectives 1 and 4, which foster startups and SMEs in chip design, develop regional centres of excellence, lower barriers to entry, and improve access to funding.

Design ecosystem: recognising that manufactured capacity must be matched with European companies capable of designing the products to be manufactured

RISC-V as an Open Standard Enabler

RISC-V exemplifies the open standards model for digital sovereignty. As a publicly available open instruction set architecture - analogous to USB or Wi-Fi - RISC-V allows any organisation in any geography to design chips locally, aligning to an internationally recognised standard without dependency on proprietary architectures.

RISC-V is now recognised by ISO/IEC JTC1 as a standard specification submitter, and numerous EU-funded projects have leveraged RISC-V for HPC, automotive, and strategic chip design. The architecture also enables multi-vendor competition and avoids single-vendor lock-in, as multiple commercial and open hardware IP vendors can supply RISC-V implementations under clear and stable licensing terms.

Open Source Strategy: Ambitious Intent, Weaker Instruments

Astor Nummelin Carlberg from SUSE offered a frank assessment: the EU Open Source Strategy is arguably the most ambitious and analytically sophisticated Open Source strategy in the world. It correctly understands the difference between Open Source projects and products, upstream and downstream dynamics, and the importance of Open Source as a sovereign tool.

However, there is a paradox: when it comes to actually deploying this tool to change behaviours, particularly in procurement, the strategy falls short. The sense of urgency in the text (with market concentration data, dependency risks, and geopolitical threats) is not matched by the strength of the policy instruments. The €264 billion paid annually to non-EU proprietary vendors illustrates the depth of the lock-in that must be overcome.

The Upstream First Principle and the Forking Debate

David Szegeti, Chief Architect - CTO Organization at Red Hat raised a concern relevant to any EU-specific Open Source initiative: the risk of encouraging or inadvertently incentivising the forking of globally collaborative upstream projects.

Open Source communities are inherently global. A project may have contributors from Czech Republic, Asia, and Wisconsin simultaneously, geographically anchoring a project as 'EU-based' misunderstands how community-driven development works.

Forking should be treated as a last resort, not a default strategy. The strategy does not explicitly encourage forking, but the capability question remains. Can Europe maintain a credible fork of critical software if geopolitical circumstances require it? This is indeed a legitimate capacity-building consideration.

Supply chain security is increasingly complex. With AI-assisted vulnerability discovery and the scale of modern dependency trees (Java, Go, Rust packages, etc.), even large vendors like Suse and Red Hat find it challenging to maintain security across all upstream versions. Smaller entities face even greater challenges.

Astor added that the Linux Foundation itself was created as a private sector response to over-dependence on a concentrated OS market, demonstrating that managing dependencies through open collaborative frameworks is a proven model. Open Source has survived intense commercial competition between private actors; it can survive geopolitical tension as well.

The Digital Omnibus and Regulatory Coherence

Moderator Dr. **Monique Calisti** launched a substantive debate on the Digital Omnibus deregulation initiative and its potential tension with the Tech Sovereignty Package.

Astor argued for nuance over camps: the debate is not between pro- and anti-regulation but between good and bad regulation. The Payment Services Directive, for example, was a regulation that created an entire new market (fintech) by mandating interoperability obligations on banks. Open Source first as a procurement principle similarly creates market conditions rather than simply constraining choices.

Zuzanna of Open Future identified a core tension: Europe is simultaneously trying to level the playing field by loosening some regulations (omnibus approach), while also trying to transform its traditional strengths : legal certainty, rule of law, trustworthiness — into competitive advantages (sovereignty approach). These directions risk pulling against each other.

David of Red Hat noted genuine use cases for regulatory simplification, particularly where the AI Act and GDPR create conflicting compliance obligations in LLM-adjacent contexts. Simplification where regulations genuinely conflict makes sense.

Standardisation: Adopting vs. Contributing

Andrea raised an important point absent from the package: while the strategy references adoption of and alignment with international standards, there is insufficient emphasis on Europe actively contributing to international standards. Adoption and contribution are complementary but distinct. European contribution to global standards builds interoperability, enables healthy competition, and ensures that open standards reflect EU values and interests, not just EU compliance with externally set norms.

Key Takeaway

What the Community Welcomes

Laszlo Igneczi, Executive Director at Open Forum Europe, partner of the NGI Commons project wrapped up the webinar on a positive note.

Open Source is recognised as a strategic policy tool. It is not a lobby outcome, but a recognition that open technology is the European way of addressing future digital challenges. This elevates community expectations and responsibilities.

Concrete legislative provisions: Both CADA and Chips Act 2.0 contain specific, actionable legislative measures aligned with the strategic Open Source principle.

Open Source as solution, not risk: The package frames Open Source as a proven security and transparency solution, reversing earlier tendencies to treat it as a vulnerability or threat.

Governance and institutional structure: The OSPO network and Digital Commons EDIC are recognised as necessary institutional infrastructure. The foundation framework remains to be detailed but signals the right direction.

Collaborative approach: The Commission explicitly acknowledges that implementation is a shared endeavour, not a top-down mandate.

Gaps Identified as Opportunities

Open Source first principle needs strengthening. Particularly in the legislative text around procurement. The language in current proposals should be made stronger and more operative.

Standardisation: Broader scope is needed. The strategy should more explicitly address open hardware, full supply chain standardisation, and Europe's active contribution to (not just adoption of) international standards.

Funding ambition: The €2 billion over seven years envelope could be higher given the multiplicative societal return of Open Source investment.

Maintainer and developer upskilling: Skills provisions should explicitly target Open Source maintainers and developers, including support for upstream participation — the core of Open Source's value chain.

Transparency for intermediaries: Undisclosed incentive arrangements between IT consultancies and cloud providers remain an unaddressed structural barrier to procurement change.

Bundling and layer separation: The cross-subsidisation challenge in cloud markets requires further legislative attention, whether in CADA or future instruments.

Next Steps and Community Action

Legislative Engagement

The legislative process is ongoing. The NGI Commons community and allied organisations are encouraged to actively engage with the following legislative files currently in progress:

Cloud and AI Development Act (CADA): Negotiations between EU institutions are underway; community input can still influence final text, particularly on Open Source first language and procurement strength.

Chips Act 2.0: Legislative development of demand-side measures offers further input opportunities.

Digital Networks Act (DNA): Currently in the pipeline; Open Source provisions should be considered where absent.

Standardisation Regulation: Expected to be tabled after the summer break; Open Source standardisation principles should be integrated.

Public Procurement Reform: Expected before the summer break; a critical opportunity to embed Open Source first requirements.

Procurement Guidelines Development: Contribute to the development of guidelines for public authorities to assess and procure Open Source — a Commission commitment that requires community expertise to be operationalised effectively.

Branding and Visibility: The Commission acknowledged that communicating the quality and readiness of Open Source solutions to public sector procurement officers remains an unfinished task. The community has a role in demonstrating and communicating real-world Open Source quality.

Gemma Carolillo concluding comments

Gemma of DG CONNECT concluded with a direct appeal to the community:

“Stay engaged during legislative negotiations: Make your voice heard!”

Noting that feedback should be provided before the legislative proposals are finalised, not only after.

Engage with Commission-led procurement processes: the Commission is actively expanding its own Open Source procurement, which creates demonstrable examples for wider public sector adoption.

Help communicate quality: ensuring that the public sector understands the availability and quality of Open Source solutions is a shared responsibility between the Commission, industry, and the community.

Conclusion

The NGI Commons Webinar on the Tech Sovereignty Package revealed a community that is informed, engaged, and constructively critical. The broad consensus is that the package marks a genuine and historically significant step forward: One that should be welcomed and built upon, not dismissed for its imperfections.

The fundamental insight that undergirds the entire discussion is simple but consequential: Europe's digital dependencies are the cumulative result of millions of procurement decisions over decades. Reversing this trajectory requires changing procurement behaviour. Systematically, at scale, through both legislative mandate and institutional capacity. The Tech Sovereignty Package provides the framework; the community's task is to ensure it is implemented with the ambition the moment demands.

As Laszlo Igneczi concluded: this is a time for action, on legislative files, on community networks, on national and European levels, and on the concrete tools that will translate strategic intent into digital sovereignty in practice.

Community Coordination and Capacity Building

Digital Commons Task Force: Join this expert group to contribute to shaping policy input and community positions between major events.

Digital Commons Policy Summit 2026: 12 November, Brussels. Second edition of the summit, organised jointly with the European Commission in alignment with the Open Internet Stack initiative. A critical moment to consolidate community positions and present them to policymakers.

NGI Commons Cascade Funding: Cascade funding mechanisms are available for distributing EU public funding to Open Source projects and communities. Details are available via the NGI Commons channels and the info address provided.

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Funded by the European Union

Project funded by
Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra
Swiss Confederation
Federal Department of Economic Affairs, Education and Research EAER
State Secretariat for Education, Research and Innovation SERI

NGI Commons (Open Source and Internet Commons for Europe’s Digital Sovereignty) project is funded by the European Union’s **Horizon Europe research and innovation programme** under Grant Agreement number 101135279. This work has received funding from the **Swiss State Secretariat for Education, Research, and Innovation (SERI)**. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union. Neither the European Union nor the granting authority can be held responsible for them.