CONCIERTO | SOVEREIGN INTELLIGENCE

Sovereign Perspectives · Sovereign Strategy

Digital Non-Alignment

Sovereign AI and the New Geopolitics of Technology

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In Brief

- The two-bloc framing of AI is a false choice for the global majority, and dependency on either pole carries the same strategic cost.
- Renting national intelligence transfers control over an economy's most important faculty to actors outside its jurisdiction.
- Consumption-priced AI operates as a permanent import, drawing national wealth outward without building a domestic asset.
- Digital non-alignment sources capability from anyone and keeps ownership at home, turning the frontier from an indispensable sovereign into a replaceable supplier.
- It is a governance posture available to any nation, and it turns on principles a government can adopt today.

The choice before most nations is not which AI bloc to join. It is whether to own the intelligence they will run on, or to rent it for good.

Executive Summary

Artificial intelligence has become the defining strategic technology of the century, and its production is concentrating in a very small number of countries. In 2024, institutions in one country produced 40 of the world's notable AI models, to China's 15 and all of Europe's three. The frontier is made in two places, and most of the world can only consume what those two places produce. This paper argues that the framing of a two-bloc AI world presents the global majority with a false choice, and that there is a third path the world's leaders are already naming: to source capability from anyone while keeping ownership and control at home.



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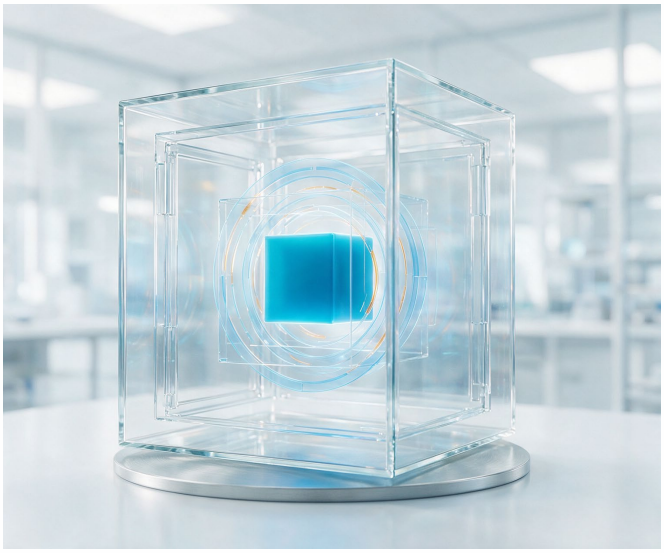
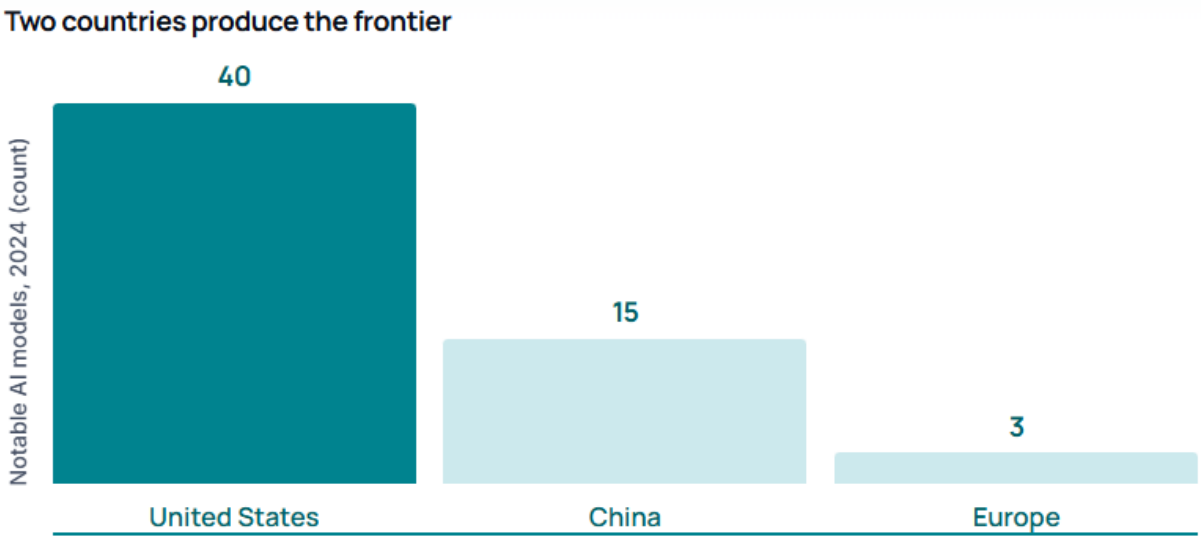
1. A New Fault Line Runs Through the World Order



Every era has a technology that reorganizes power, and the nations that shaped each era owned the means of its production rather than leasing them. Intelligence is that technology now, and it differs from earlier ones in a way that matters: it is not a tool a nation acquires once, but a faculty it runs on continuously, present in the decisions of its ministries, the operations of its banks, and the workflows of its firms. The concentration is visible in what the world produces. Notable AI models come almost entirely from two countries, and the rest of the world, including all of Europe combined, produces only a fraction.

A nation's place in this order is not set by how much AI it uses. It is set by how much of that AI it owns.



The rest of the world, including all of Europe combined, produced only a handful. In 2025 the US produced 59 and China 35. Source: Stanford HAI, 2025 & 2026 AI Index Reports (model counts from Epoch AI).

Figure 1. Notable AI models by country of origin, 2024. Source: Stanford HAI, 2025 AI Index Report (data: Epoch AI).

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2. The Two-Bloc Trap

The prevailing account of AI geopolitics describes a contest between two poles and invites every other nation to choose a side. But the choice on offer is a choice of landlord, not a choice of ownership. Whichever pole a nation aligns with, it aligns as a tenant, and tenancy carries the same cost regardless of which bloc grants it: access that can be repriced, terms that shift with another government's politics, and sensitive data passing through infrastructure the nation does not control.

> **The bloc a nation joins changes the flag over the landlord. It leaves the fact of the lease untouched.**

What the two-bloc framing promises	What tenancy actually delivers
Access to the frontier	Access on terms set in another jurisdiction, revisable without consent
A strategic partner	A provider whose obligations run to its own government first
A path to modernization	Modernization built on a foundation the nation cannot control
Security through a strong ally	A single point of dependence that widens the attack surface of the state



3. The Cost of Renting a Nation's Intelligence

When a nation rents its intelligence, it does not merely buy a service. It cedes a set of controls that, taken together, define strategic autonomy in the age of AI. The concessions are easy to miss one at a time, because each reads as a reasonable term in a commercial contract; seen together, they describe a transfer of national capability.

A nation that runs on borrowed intelligence gradually runs on borrowed judgment.

Domain	What passes out of national control	Why it matters to the state
Economic	The price and availability of a core input to every sector	A foreign meter sets a growing share of the national cost base
Informational	The data that grounds the intelligence, and the record of its use	The nation's knowledge improves a capability it will never own
Cultural	The values, language, and assumptions embedded in the model	Public life is mediated by intelligence shaped elsewhere
Continuity	The guarantee that the capability keeps running	A crisis abroad becomes a crisis at home

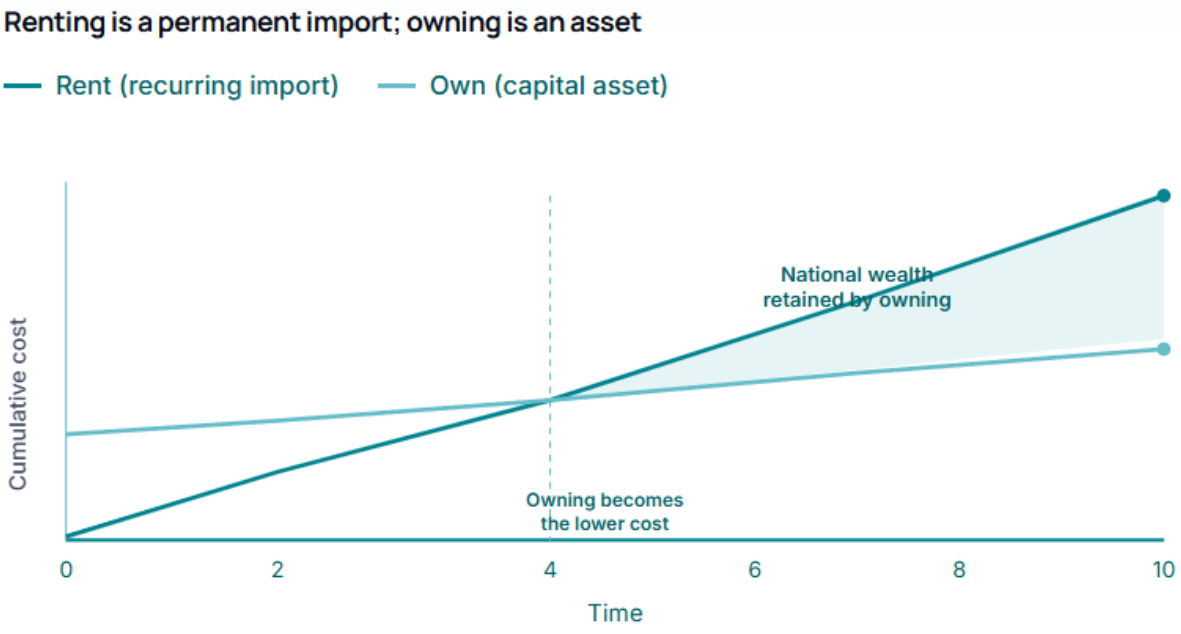


4. The Intelligence Balance of Trade



Consumption-priced AI has the economic shape of a permanent import. Every workload and automated decision carries a fee, and the fee scales with use, so success in adopting AI enlarges the bill rather than retiring it. The more productive a nation becomes with rented intelligence, the more it pays the foreign supplier, and the larger the recurring deficit grows. Governments have read the same ledger, and national AI strategies are expanding, particularly among developing economies, with state-backed investment rising in parallel, a sign of growing ambitions for domestic control.

A capability a nation pays for without end is a tax collected by a foreign supplier, and it rises every year the nation succeeds.



ILLUSTRATIVE · conceptual, not to scale. Shows the shape of the two paths, not any nation's figures.

Figure 2. The economics of renting versus owning national intelligence. Illustrative and conceptual, not to scale.

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5. Digital Non-Alignment: A Third Path

In the last century, newly independent nations refused a total binary between two blocs and held a third position: engagement with both, capture by neither, and sovereignty as the first principle. Digital non-alignment applies that principle to intelligence. A digitally non-aligned nation stays open to frontier technology and sources capability wherever it is best, while keeping ownership and control at home. It treats the frontier as a supplier and declines to treat it as a sovereign.

> **"This is our fight for sovereignty, for strategic autonomy."**
> Emmanuel Macron, President of France · on building national AI infrastructure, 2025.

This is what makes non-alignment practical rather than aspirational. A nation need not match the frontier to be sovereign over its intelligence; it needs to own the intelligence it runs on, ground it in its own data, govern it under its own rules, and keep it running inside its own boundaries. The producing blocs then shift from indispensable to merely valuable, and that shift is the whole of what sovereignty buys.

> **Non-alignment keeps the frontier as a supplier and the nation as the sovereign.**



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6. The Sovereignty Test

For a nation systemically important institutions the sovereignty test is not a spectrum but a threshold. A national exchange, a central bank, a defence ministry, a large regulated bank cannot run its core reasoning on intelligence another power can withdraw, throttle, observe, or price at will, so for them sovereignty is binary: the whole estate is sovereign or it is not. Partial sovereignty, a sovereign veneer over a rented core, fails the test the moment it matters, because the dependency is still there where it counts.

Sovereign AI has become a crowded phrase, and skeptics are right to press it, because much of what is marketed as sovereignty leaves the essential dependencies in place. A nation can stand up a national data center and still run on chips, cloud, and models it does not control. Genuine sovereignty has to be tested against what a nation actually holds, and the principles below are that test.

Principle	What it means for the nation
Ownership of the stack	The nation holds the intelligence it runs on as property, across every layer, rather than as access to someone else's
Residency of data	The data that grounds national intelligence stays inside national boundaries and under national law
Governance by the nation	The rules that constrain the intelligence are set by the nation, aligned to its values and legal codes
Portability of capability	The nation can move its intelligence across suppliers and venues without losing what it has built
Continuity through volatility	The capability keeps running through provider failure, sanction, and political rupture

Portability is the answer to the skeptic: a nation that can move its intelligence between suppliers keeps its optionality even while it draws on foreign compute today.

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7. The Creation Dividend

Sovereignty answers the question a nation's citizens will actually ask, which is whether AI will replace them or extend them. The International Monetary Fund estimates that about 40 percent of jobs worldwide are exposed to AI, and roughly half of the exposed jobs in advanced economies could gain from it rather than lose. Exposure is not destiny. Whether it becomes augmentation or displacement depends on who owns the faculty and whether its use is rationed by a foreign price.

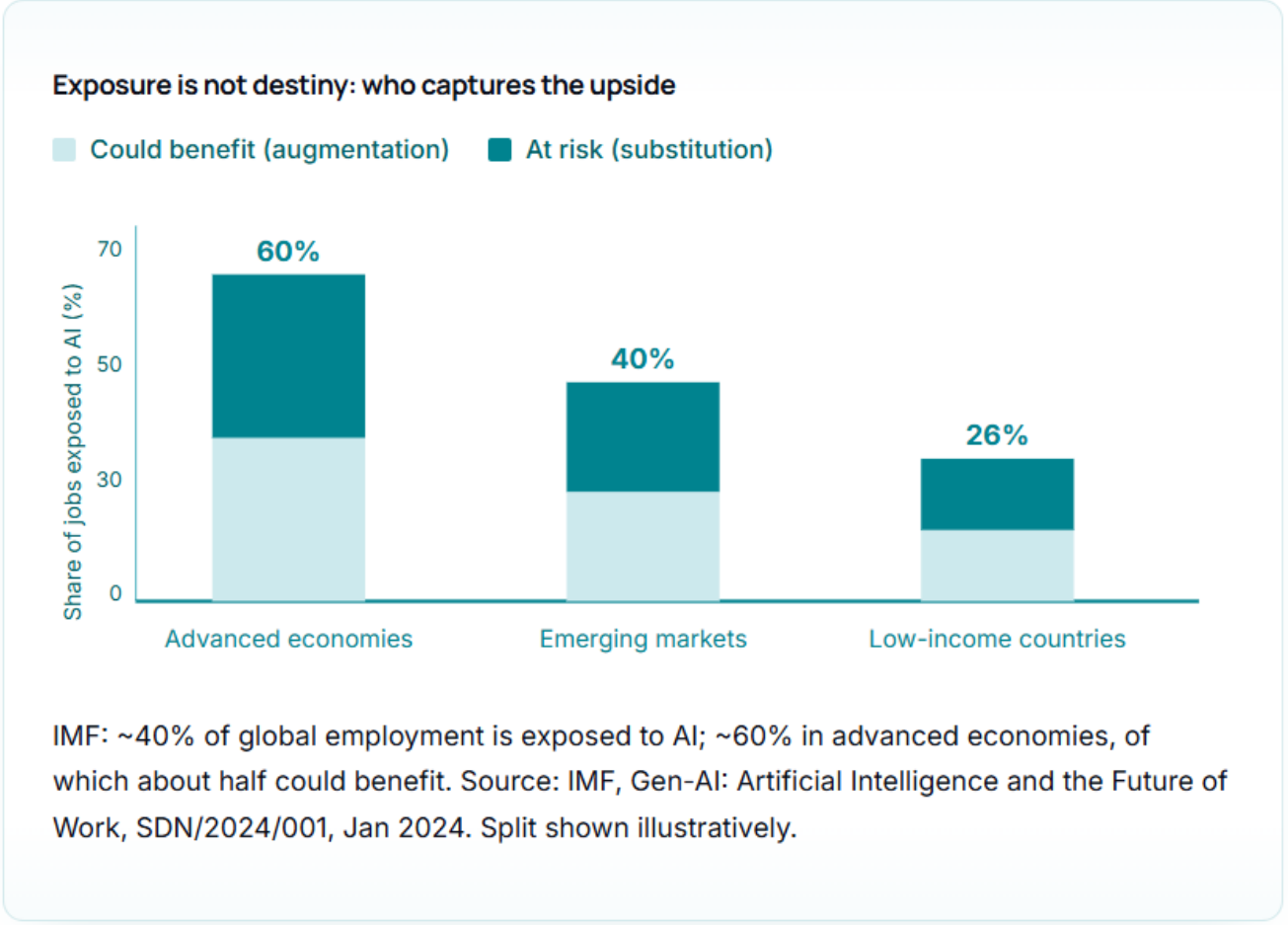

Figure 3. AI exposure and opportunity by economy type. Source: IMF, SDN/2024/001, 2024; split shown illustratively.

Owned and shared, intelligence turns a nation's workers into authors. Rented and rationed, it turns them into a line item to be cut.

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8. A Policy Agenda for Sovereign Intelligence

Digital non-alignment moves from posture to practice through deliberate policy, stated at the level a government can act on and independent of any single technology or supplier.

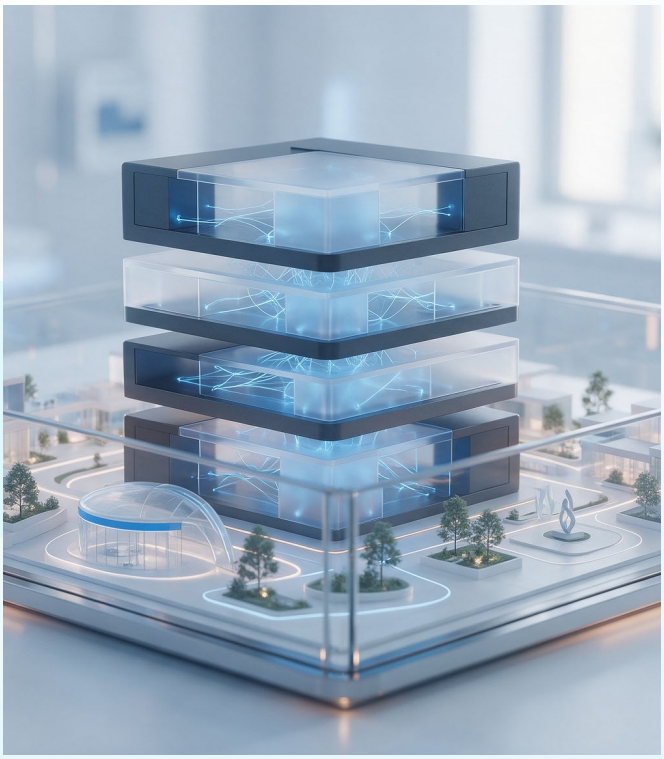
- **Classify national intelligence as critical infrastructure.** Hold the intelligence a nation runs on to the standards applied to power, water, and finance.
- **Set an ownership standard for the public sector.** Require that intelligence in the core functions of the state be owned, grounded in national data, and resident under national law.
- **Mandate portability and exit.** Keep national intelligence movable across suppliers and venues, so no provider becomes indispensable.
- **Build verification, not assurance.** Develop the capacity to audit and attest sovereignty as a technical reality within the nation's own oversight.
- **Convene the global majority.** Pursue non-alignment as a shared posture, and build common standards, shared capacity, and collective leverage.

A nation that classifies its intelligence as critical infrastructure has already made the essential decision. Everything after that is implementation.

9. The Choice

The geopolitics of AI is often described as a race, which persuades most of the world that its only decision is which frontier to depend on and obscures the decision that actually matters, which is whether to depend at all. Digital non-alignment restores that decision to the nations that have been told they do not have one. It asks no country to reject the frontier or to match the largest producers; it asks a country to own the intelligence it runs on, govern it under its own law and values, and keep the wealth and capability at home.

A nation that decides within this window enters the coming decade as an author of its own capability and a partner to the frontier on its own terms.



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About This Series

Sovereign Perspectives is a research program on the ownership and governance of intelligence, published by Concierto. Its papers examine the strategic, economic, and institutional questions that artificial intelligence raises for governments and other accountable institutions, and they are written for the leaders making those decisions. The program's aim is to advance the public argument, not to promote a product.



Sources

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