Forrester Global Sovereignty Forecast: Despite Rising Geopolitical Tensions, Technology Sovereignty Will Advance Slowly Through 2030

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China and the US will remain leaders in technology sovereignty, leaving most European and midsize countries dependent on external alliances to close capability gaps

CAMBRIDGE, Mass.--(BUSINESS WIRE)--Jul. 16, 2026-- According to Forrester's (Nasdaq: FORR) Global Sovereignty Forecast, 2025 To 2030, global technology sovereignty — a country's ability to develop, operate, and secure critical technologies independently of foreign governments' influence — will evolve slowly over the next five years. The average tech sovereignty score across all 14 countries assessed (Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico, South Korea, Spain, the UK, and the US) is expected to rise only minimally, from 39% in 2025 to 40% in 2030. China and the US lead the pack, recording the highest overall tech sovereignty scores at 82% and 79%, respectively. Both countries are expected to maintain their lead over the next five years, underscoring that tech sovereignty will remain concentrated among a small number of geopolitical and economic powers. To close capability gaps and reduce critical technology dependencies, other countries will need to rely on strategic partnerships and alliances.

Released for the first time, Forrester's Global Sovereignty Forecast includes a tech sovereignty index, which measures a country's ability to develop, operate, and secure critical technologies independently to reduce exposure to geopolitical risks. The index assesses each country across nine dimensions of technology sovereignty: government AI investment, cloud sovereignty, technology workforce availability, AI model development, data center capacity relative to technology spending, data center autonomy, semiconductor production, software creation, and rare earths processing.

Among all technology dimensions, semiconductor manufacturing shows the strongest projected improvement, led by the US and South Korea, whose chip production scores are expected to increase from 45% in 2025 to 79% in 2030, followed by Japan (36% to 53%), China (40% to 51%), and India (0% to 13%). Even with these improvements, semiconductors and software will remain among the most significant sovereignty challenges due to concentrated chip supply chains and a handful of dominant software providers.

Additional key findings from the forecast include:

- **Asia Pacific is highly polarized.** The region encompasses both the world's strongest and most constrained technology sovereignty positions. After China, South Korea is expected to rise from 45% in 2025 to 47% in 2030, followed by Japan from 43% to 46%. India is also forecasted to improve from 32% to 35%, while Australia is expected to remain flat at 29%.

- **North America presents a sharp sovereignty divide.** While the US is forecasted to remain a global leader, Canada is expected to improve more modestly, from 33% to 34%. Mexico will continue to remain the lowest among the 14 countries assessed, at 20%, highlighting the region's uneven distribution of technology power.

- **Europe's largest economies remain dependent on foreign technology providers.** Germany and Spain are each forecasted to rise from 34% in 2025 to 36% in 2030, France from 33% to 35%, the UK from 30% to 32%, and Italy from 27% to 29% Despite these improvements, Europe's lower scores reflect significant dependencies on chips, cloud, software, and data center capacity.

"Ongoing geopolitical volatility, AI competition, and semiconductor supply chain risks have put tech sovereignty firmly in the spotlight," said Dario Maisto, principal analyst at Forrester. "Today, tech sovereignty is concentrated in the hands of a few global leaders, creating an uneven competitive advantage for some countries. To compete in the AI era, nations must understand their strategic dependencies and build durable partnerships that safeguard their data, infrastructure, and long-term autonomy."

Resources:

- Learn more about the *Global Sovereignty Forecast, 2025 To 2030* by downloading the report **[client access required]**.

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