

MATRIX CONFERENCE 2026 • MALMÖ

Digital Sovereignty Is No Longer a Buzzword

It's Procurement Policy

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CompuGroup Medical • Healthcare IT on the Matrix protocol

01 · THE MOMENT

“We cannot afford to depend on others for the technologies that keep our hospitals running.”

Ursula v.d.Leyen, European Commission, 3 June 2026 — on adopting the European Technological Sovereignty Package

For the first time, open source sits explicitly at the centre of Europe’s digital strategy. The timing is not coincidental — it is the political response to a dependency Europe can no longer afford.

01 • THE MOMENT

Meanwhile, clinical reality runs on WhatsApp

Not out of ignorance — because it works, and the patients are already there.

82%

of healthcare organisations
carry significant shadow IT
exposure

58%

of healthcare staff use free,
generic AI tools at least
monthly

>50%

believe health data ends up in
consumer messaging apps

The NHS has internally described WhatsApp use as a “privacy and clinical safety timebomb”.

Sources: Bitglass/Zscaler shadow IT survey 2023 · Wolters Kluwer Shadow AI study 2024 · ACM shadow health data study · NHS reporting

02 · DEFINITION

Sovereignty is not isolation

It is the ability to decide: with whom, over which infrastructure, under whose conditions.

01

Data sovereignty

Where does the data live?

Self-hosting and EU-based homeservers — full control over storage location.

02

Infrastructure sovereignty

Who operates the platform?

Every organisation can run its own homeserver; federation instead of one central operator.

03

Protocol sovereignty

Who controls the standard?

Open specification under open governance — no single entity, including us, controls it.

Matrix addresses all three at once. That is what makes it different.

02 · DEFINITION

Three layers, four platforms

	WhatsApp	Signal	Microsoft Teams	Matrix
Data sovereignty	Meta servers (US / IE); metadata retained	Signal Foundation (US); minimal data	Microsoft cloud; no E2EE by default	Self-hosted, EU-based; full control
Infrastructure sovereignty	Centralised; no self-hosting	Centralised; no official self-hosting	Centralised; no full self-hosting	Federated; run your own homeserver
Protocol sovereignty	Proprietary; Meta-controlled	Open source, but Signal-steered; no federation	Proprietary; Microsoft-controlled	Open standard; open governance

All three sit under US jurisdiction — the CLOUD Act applies wherever the servers stand.



02 • DEFINITION — ECONOMIC VIEW

European providers hold just 15% of the cloud market

Sovereignty is also a question of where market growth and its margins land.

15%

European providers' share of
cloud infrastructure, 2025
(29% in 2017)

70%

held by Amazon, Microsoft and
Google combined

2%

each for SAP and Deutsche
Telekom, the largest European
providers

Market growth only builds European capital if European providers own the platforms.

Source: Synergy Research Group, European cloud infrastructure market, 2017–2025 (via The Register, July 2025, and CNBC, February 2026).

02 · DEFINITION — SECURITY VIEW

One US satellite service disrupted Ukraine's drones

The risk is not a state. One service, one company or one owner can cut the link.

Dependence

A rich person decides

A commercial company, not a government, can switch it off. Starshield limits hit Ukrainian missions in October 2026.

Alternatives

An European Satellite Network and Open standards

Eutelsat's LEO business runs on published open standards, with several terminal makers. Starlink publishes nothing (TDMA/OFDMA waves).

In war, sovereignty means the mission keeps flying

A second satellite network and open standards mean no single company decides a mission.

03 · PROOF

Europe has already chosen — 20+ governments

Country / sector	Product	Scope
Germany — defence	BwMessenger (BWI)	100,000+ users, cleared for VS-NfD
Germany — public administration	BundesMessenger	Federal, state and municipal bodies; SaaS via T-Systems
Germany — healthcare	TI-Messenger (gematik)	74m insured reachable; 11,343 staff users (Sep 2026)
Germany — digital workplace	openDesk (ZenDiS)	Sovereign public-sector workplace
France — government	Tchap / LaSuite (DINUM)	All ministries
Sweden — social insurance	SAFOS Chatt (Försäkringskassan)	National agency
European Union	Element / Matrix, internal	European Commission's own comms

This is no longer a pilot phase. It is production infrastructure.

Four drivers turning sovereignty into obligation

NIS2

Healthcare is an “essential entity”

Fines up to €10m or 2% of turnover for essential entities — audits underway, encrypted comms required (Network and Information Systems Directive 2 – NIS2).

EHDS

Interoperability becomes law

The European Health Data Space mandates structured data exchange — Matrix federation is a compliant answer, not a workaround.

EU Package

Procurement criteria in the making

The Technological Sovereignty Package (June 2026) puts open source at the centre of EU procurement criteria.

CRA

Secure-by-design becomes mandatory

The Cyber Resilience Act mandates secure-by-design software, with reporting duties from Sept 2026 and fines up to €15m from Dec 2027.

What sovereignty looks like in a tender

Five questions already appearing in European public-sector and hospital tenders today.

- 1 Is there a genuine on-premise option?
- 2 Is the core open source — and therefore auditable?
- 3 Is hosting inside the EU, under GDPR?
- 4 Is the buyer free of vendor lock-in?
- 5 Does it interoperate with other systems via an open standard?

Matrix is the only messaging foundation that answers yes to all five.

05 · HEALTHCARE

Reach is not adoption — yet

German TI-Messenger – one of the world’s largest Matrix deployment in healthcare by potential. The dashboard tells the second half.

POTENTIAL REACH

74m

statutory insured with
a TIM client in their
ePA app

150k+

healthcare
organisations in the TI

USE — gematik TI-Dashboard

11,343

staff users from
healthcare institutions

401,589

insured registered via
their ePA app

Registered insured are 0.5% of the 74 million who could be. On the provider side it is thinner still:
11,343 staff users across the entire sector.

Reach: TI-M is integrated into every statutory insurer’s ePA app — mandatory for insurers, voluntary for providers. Actual use:
gematik TI-Dashboard, 2 September 2026.

05 · HEALTHCARE — THE HONEST PART

And yet: adoption is slow. Here is why.

Being honest about this is not a weakness of the argument — it is the argument.

No incentive

Unlike other TI components, TI-Messenger use is neither mandatory nor funded through the TI-Pauschale paid to physicians. There is no business reason to switch.

Patients are elsewhere

Clinicians default to WhatsApp because their patients are already there. Asking them to adopt an additional healthcare-specific messenger is a hard sell.

Federation at scale

Element's CTO, at the 2024 TI-Messenger Summit: "the most complex setup of a decentralised system there is." The complexity is real, not rhetorical.

The problem is not the technology. It is incentives and governance.

06 · THE BOLD CLAIM

Nobody controls the standard — not even us

That is precisely the message buyers want to hear.

Proprietary platform

You buy a product.

The vendor owns the roadmap, the protocol and your exit cost. Switching means starting over.

Matrix

You buy infrastructure.

The standard is open and governed in the open. You pick the best vendor — and you can replace them.

Our invitation to the other vendors in this room

Let us build shared certification frameworks for healthcare across Europe. Interoperability between our products is not a loss of margin — it is the one advantage none of us has against Microsoft Teams, Slack or WhatsApp.

Four asks before the window closes

Policymakers

Add binding procurement criteria for open standards in critical infrastructure to the EU Open Source Strategy.

Hospitals and providers

Start your next tender with Matrix conformance as a minimum requirement — not a nice-to-have.

The Matrix community

Build a shared healthcare certification framework Europe-wide. TI-Messenger is the starting point, not the ceiling.

All of us

Use the momentum of the June 2026 Sovereignty Package. The window is open. It will not stay open.

Thank you

Questions — and the harder ones especially — very welcome.

What I hope you take away

A framework for positioning Matrix in regulated procurement.
An honest account of where adoption stalls, and why.
A concrete next step for the Matrix ecosystem in European healthcare.

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