

GLOBAL SOUTH AI SAFETY HACKATHON · JUNE 2026

From Compute to Access

Inference Sovereignty as the Missing Layer of AI Governance

A measurement framework for the Global South, with case studies from Southeast Asia

Track: Asia · Sub-track: Governance, Policy, and Geopolitics · Hub: Ho Chi Minh City

The dominant AI sovereignty debate asks:

Who can create intelligence?

For most states, that question is already settled.

The real question is who can access it.

WHY NOW

Frontier training costs are pricing out everyone but a handful of states

~\$100M

GPT-4, 2023

Epoch AI

\$200–500M

Frontier runs, 2026

Epoch AI estimate

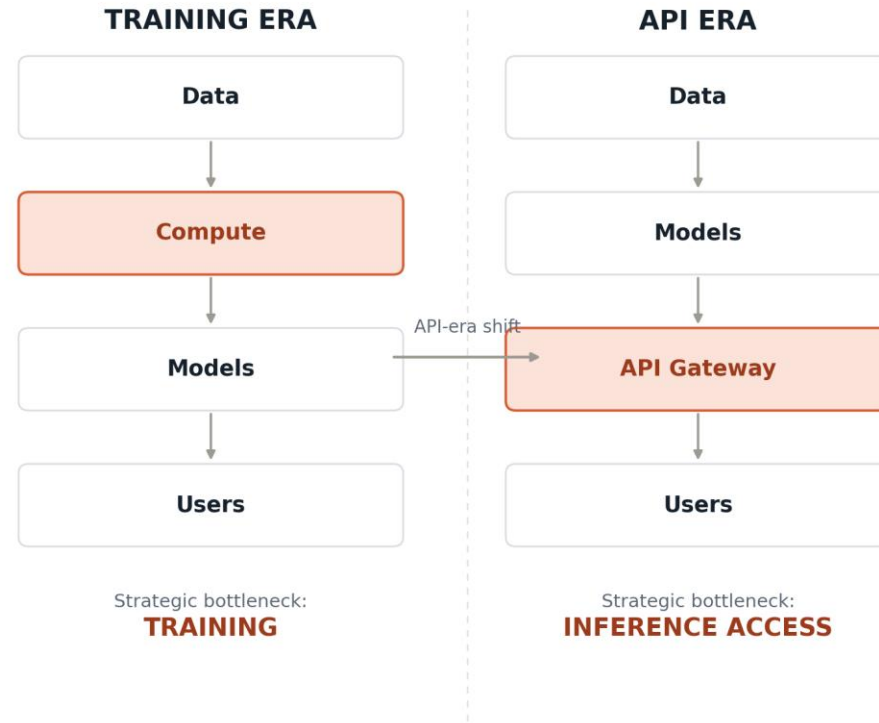
\$1B+

Projected by 2028

Epoch AI growth trend

Each step prices out another tier of states from ever training a frontier model.

The strategic bottleneck moved



Training era: compute is the chokepoint. API era: the gateway is.

MEASUREMENT

How do you measure dependence?



Provider concentration

Reliance on a single foreign provider



Switching cost

Cost of migrating to an alternative



Fallback capability gap

No domestic or open-weight alternative



Regulatory leverage gap

Can the state compel provider behavior?



Resilience gap

Tested plan if access is disrupted

$$IDS = 100 \times (\sum w_i \cdot score_i) / (\sum w_i \cdot 3)$$

0 = full sovereignty · 100 = full dependence · weights are analyst-adjustable

Three countries, three different routes to managing dependence

Vietnam

LEGAL-EXTRATERRITORIAL

- Binding Law 134/2025 + Decree 142/2026
- Applies to foreign providers regardless of HQ

67

High dependence

Indonesia

SECTORAL-FRAGMENTED

- Hard rules for finance & health only
- General-purpose AI governance still voluntary

77

High dependence

Singapore

STRUCTURAL-NORMATIVE

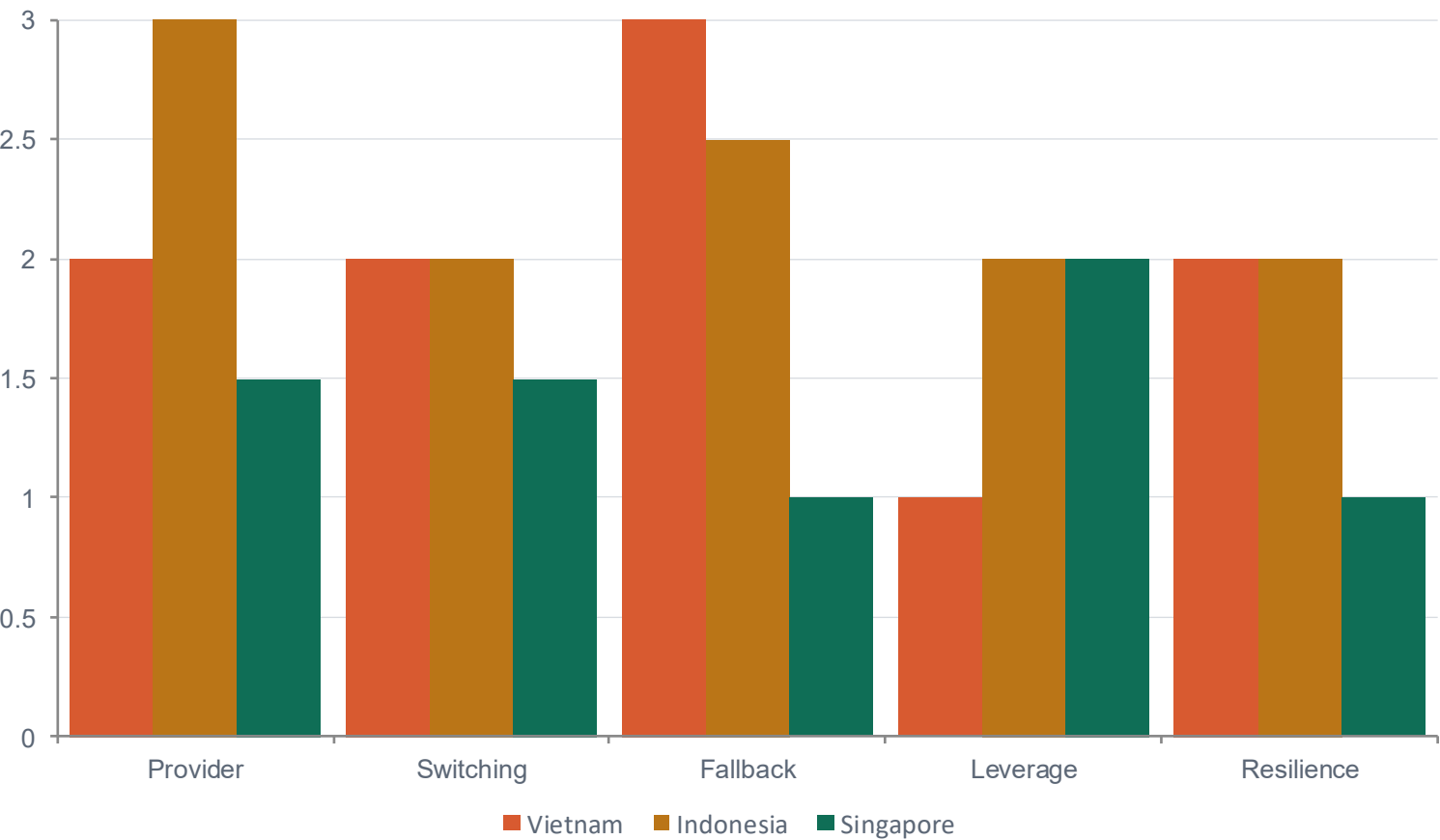
- Voluntary Model AI Governance Framework
- Leverage via AI Verify & regional norm-setting

47

Moderate dependence

COMPARATIVE FINDING

The state with the strongest law isn't the least dependent



Vietnam

67

Indonesia

77

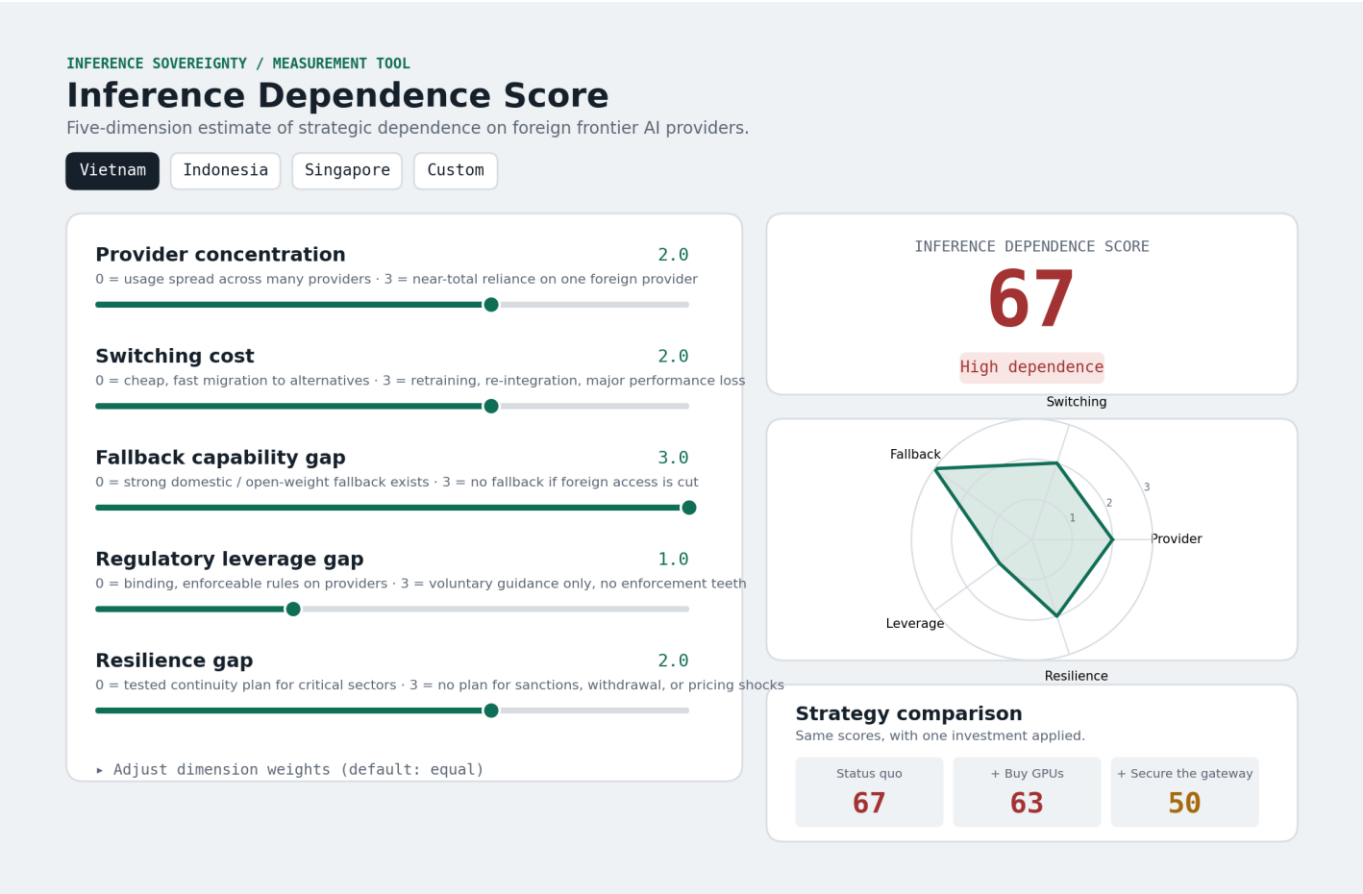
Singapore

47

Vietnam's binding, extraterritorial law still scores higher dependence than Singapore's voluntary framework.

THE TOOL

The measurement, not just the argument



Status quo 67

+ Buy GPUs 63

+ Secure the gateway 50

Compute investment barely moves the score. Securing the gateway does.

STRONGEST RECOMMENDATION

National AI gateways

A sovereign API layer, like a national payment switch, between domestic users and foreign AI providers.



**Provider changes terms,
raises prices, or fails**



**Gateway reroutes traffic
to an alternative back end**



**Critical services
continue uninterrupted**

Privacy

Prompt sanitization and PII masking enforced structurally at the chokepoint, not left to each agency.

Failover

Triggered by uptime and semantic-drift monitoring — auto-routes to a localized open-weight fallback.

Frontier-scale infrastructure sovereignty is concentrated among a handful of states.

Inference sovereignty is everyone else's question.

[Research report](#)

[IDS framework](#)

[Interactive calculator](#)

[Policy recommendations](#)