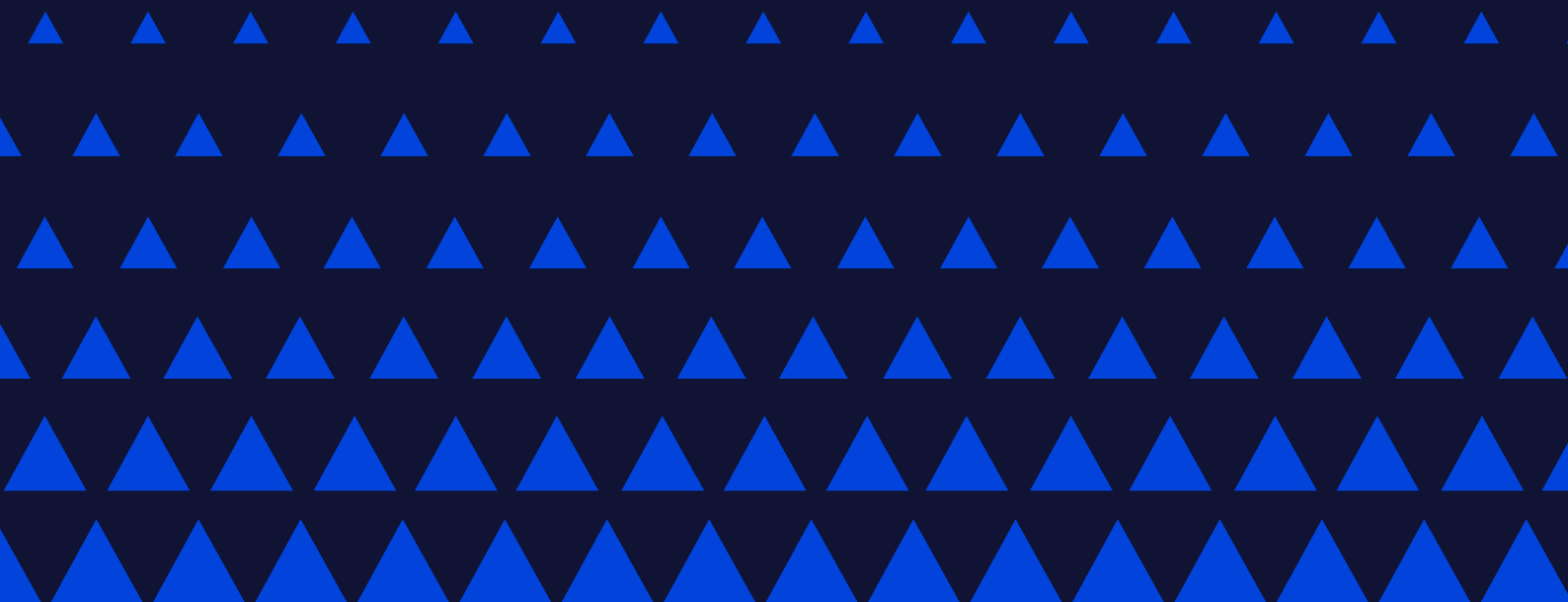


CAMP Discussion Paper

Confronting Canada's Gatekeeper Crisis



About the Canadian Anti-Monopoly Project (CAMP)

CAMP is a think tank dedicated to addressing the issue of monopoly power in the Canadian economy. CAMP produces research and advocates for policy to make the Canadian economy more fair, free and democratic.

Executive Summary

Canada's relationship with the United States has been upended. The opening months of the second Trump administration have brought sky-high tariffs, threats to unravel national security partnerships, and a fixation on the potential of Canada as the 51st state. At the same time, the largest American technology firms are forging closer ties to the new administration and tightening their grip on global digital markets.

These twin shifts mean the companies that mediate how Canadians communicate, understand the world around us, and engage in commerce can no longer be treated as benign commercial partners. Canada finds itself in a gatekeeper crisis that extends beyond purely economic matters, and into questions about national sovereignty. As Amazon, Apple, Meta, Alphabet, Microsoft and others align themselves with a White House hostile to foreign regulation, Canada's dependence on the infrastructure of U.S. tech companies is becoming a point of strategic vulnerability—from tariff negotiations to censorship threats.

Though not limited to these markets, three digital domains—online advertising, computing infrastructure, and artificial intelligence—are emblematic of Canada's dependence on US-based Big Tech firms.

In the online advertising market that feeds publishers and advertisers, three U.S. firms control roughly 90% of an over \$16 billion Canadian market.¹

What's more, the search and social media platforms at the heart of these digital advertising giants give them the ability to throttle traffic and shape the flow of information in our democracy.

The market for computing power, core infrastructure for the private and public sector alike, is dominated by Amazon, Microsoft and Google who control roughly two-thirds of global cloud services. In addition to the systemic fragility this concentration creates political pressure in Washington could see continued access to these powerful services leveraged for diplomatic gain.

Finally, in the evolving market for artificial intelligence (AI) in which Canada was once a leader, foreign monopolies are present at every layer of the supply chain. From NVIDIA chips to Google-scale data sets, the markets and supply chains responsible for generative AI are concentrated in a few foreign hands. Beyond the potential economic harms, recent events have shown how easily the owners and developers of AI tools can insert political goals into supposedly neutral systems used by a growing number of Canadians.

Canada needs policy designed for a world where access to infrastructure and services can be used as instruments of statecraft. Failing to act would leave Canadians vulnerable to economic coercion and political manipulation. Acting will require three steps: mapping Canada's deep dependency on U.S. platforms, confronting monopoly power head-on, and rebuilding digital sovereignty without retreating into isolationism.

To begin charting a new course, this discussion paper poses a series of questions that CAMP will seek to answer with perspectives from domestic and international experts:

- How can Canada guarantee reliable, sovereign access to critical digital infrastructure, when that infrastructure is currently the domain of a tight oligopoly of American firms?
- What new or strengthened policy tools are needed to rein in the power of digital gatekeepers, and how can Canada ensure those policies have teeth?
- What mix of public investment, industrial policy, and procurement strategy is needed to foster domestic or allied alternatives to American platforms in important digital markets?
- How should Canada collaborate with like-minded countries to resist pressure to weaken regulation of digital gatekeepers and present a united front on shared policy goals?

Though the path forward is uncertain, the choice before Canada is urgent: adapt our approach to respond to this new environment or watch our autonomy as a sovereign state slip away.

Introduction

Owing to our shared geography and history, Canada has for decades developed and deepened its integration with the United States. But since the early days of 2025 and the beginning of the second Trump administration, Canada's relationship with its closest partner has changed dramatically, and possibly irreversibly.

Between being the object of the American administration's enthusiasm for tariffs and the consistent musings on the future of the country as the 51st state, Canada's place in the world has never felt less secure. The decision of voters in the 2025 federal election reflected this insecurity, where the handling of the Trump administration was the second most important issue affecting voting decisions, after the ongoing cost of living crisis.²

While the outcome of this new chapter remains unclear, the expectation of stable relations with the U.S. that Canadians had taken as a given is no longer tenable. Canada must re-evaluate this changed relationship and forge a new path if we wish to remain an independent and sovereign nation. While this reconsideration must occur across our society, in few places is it more pressing than in the digital markets that comprise the engine of the modern economy. These markets touch nearly every facet of our lives: how we communicate, how we engage in commerce, and how we keep our nation secure. In each of these areas, Canadians are dependent on a small handful of American firms with tendrils firmly affixed to our economy and society.

For decades, Canadian citizens, businesses, and policy makers operated on two foundational assumptions that let this dependency deepen unchecked: that the United States would remain an ally of the Canadian people and that major American technology companies operated with a degree of removal from the interests of their domestic government. Today, neither of these assumptions holds.

Like other countries around the world Canada has in recent years been re-evaluating our relationship with companies like Alphabet, Amazon, Apple, Meta and Microsoft, and taking important steps to temper the power they have accrued. The European Union has led the way with legislation to constrain the power of digital gatekeepers, including the General Data Protection Regulation (GDPR), the Digital Services and Markets acts (DSA and DMA, respectively), and the AI act. These policies recognize that digital platforms and infrastructures are now at the heart of economic stability, personal freedoms, democratic governance, and national security. Unfortunately for Canada, what was once simply a monopoly problem has been compounded by acute threats to our sovereignty and the future of Canada as an independent nation.

The task now is to understand the depth of our dependency on these gatekeepers and develop strategies to insulate ourselves from the risks that they now pose, ensuring Canada's economic stability and political sovereignty. How citizens and policy makers at all levels of government react will determine whether Canadians remain autonomous or become subject to the interests of other nations.

With Friends Like These

In the early months of 2025, a new chapter in the relationship between major American tech companies and the White House was emerging. After spending the first term of the Trump presidency in a resistance posture, these firms adopted a more conciliatory tone in the lead up to the second administration.

Tech company CEOs made million-dollar donations to President Trump's inauguration fundraising and enjoyed pride of place in the inauguration seating chart.³ Some overtures have gone deeper as CEOs attempt to prove they have turned over a new leaf. Before his dramatic exit, there was no clearer example than Elon Musk's deep involvement in both President Trump's campaign, and his leadership of the Department of Government Efficiency (DOGE) that has been wreaking havoc in the American federal bureaucracy.⁴ But Musk was not alone in fettering the new administration. Meta CEO Mark Zuckerberg announced the end of the company's fact-checking programs that had been perceived as hostile to conservative voices, and made routine appearances at the White House ahead of the legal challenges facing the company— including an antitrust lawsuit launched by the Federal Trade Commission (FTC).⁵

While some in Silicon Valley may see themselves as part of an ideological struggle, the détente between Big Tech and the state is based in pragmatism.⁶ Changing their tack to the prevailing winds will enable these firms to avoid the fetters of regulation or otherwise incurring the ire of the state. If dispensing with equity commitments, fact-checking, or other scruples is the way to maintaining, consolidating, and increasing their power, that is the cost of doing business— just as the inverse was true when the winds blew the other way.⁷

The fruits of these efforts so far can be seen in the tone taken by the Trump administration with respect to efforts to regulate digital giants in other jurisdictions. In a fact sheet published in February, the White House made clear that it would treat the attempts of other countries to govern the behaviour of American tech companies within their borders with hostility.⁸ In the sights of the White House are the policies like Canada's and other countries' digital services taxes (DST) and the European Union's Digital Markets Act (DMA) and Digital

Services Act (DSA), efforts to ensure fair taxation and to regulate the behaviour of these platforms.

But tech executives have not been entirely successful in their attempts to reorient the Trump administration away from its populist foundation and towards their interests. President Trump and Vice President Vance were both critical of the power of Big Tech and their CEOs on the campaign trail, and a number of important U.S. antitrust suits against the monopolistic behaviour of these platforms continue.⁹ Though opportunities to cut deals and get these companies off the hook remain, so far the enmity towards efforts to rein in Big Tech appear limited to those occurring outside American borders.

This newfound closeness would be less worrisome under the longstanding assumption that Canada could count on the U.S. as a steadfast ally that respected our sovereignty. But this is no longer the case. Threats to make Canada the 51st state, potential removal from the Five Eyes intelligence sharing partnership, and the on-again off-again tariffs undermining the Canadian economy have fundamentally changed the relationship between the two countries.¹⁰ While the future direction of Canada-U.S. relations has never been more uncertain, Canadians can no longer take for granted that the government and companies they have relied on for decades will act in alignment with our interests.

These developments are so concerning because of the monopoly problem at the heart of Canada's economy. By following the path of least resistance, Canada has become over reliant on the U.S. as a trading partner and stood by as American companies integrated themselves deeper into our economy. But just how integrated are these American companies cozying up with a government that takes the sovereignty of Canada and its allies less seriously than ever before?

The State of Integration of U.S. Firms in Canada's Digital Markets

Though many of Canada's markets are deeply entwined with American giants, few are as dominated as the digital markets that make up the backbone of the modern economy. Three markets stand out for their monopolization by American firms and their centrality to the future of Canada's economy: online advertising, computing infrastructure, and artificial intelligence.

Online Advertising

Digital advertising is the financial engine of the modern internet. Publishers and free-to-use online services depend on digital ad revenue to stay afloat and advertisers large and small depend on the same markets to reach their potential

customers. As of 2023, the Canadian online advertising market was worth approximately \$16.5 billion annually, more than three quarters of the country's total advertising market. While the market has grown rapidly in recent years, it also displays levels of concentration that would be shocking in any other market. Of that over \$16 billion figure, nearly 90% is represented by just three American companies acting as the middle men for these advertising dollars: Alphabet and Meta hold 75% of the effectively duopolized market, with Amazon in a distant third with roughly 14%.¹¹ In large part, this domination of online advertising is downstream from ownership of omnipresent platforms in areas like internet search, video streaming, social media, and e-commerce. One measure of concentration in the antitrust and competition space is the Herfindahl-Hirschman Index (HHI), calculated based on revenue share data of the players in a market. In Canada and the United States, competition regulators consider a market with an HHI of 1,800 or greater to be highly concentrated and worthy of scrutiny.¹² In 2023 the HHI of Canada's online advertising market was north of 3,300, well above a level that would warrant inspection from competition regulators.

Before the issue of sovereignty raised its head, the monopolization of the online advertising market was already a priority for competition authorities and policy makers. Both Alphabet and Meta are under concurrent antitrust investigations around the world, including in Canada, for their anti-competitive practices in online advertising markets, and Alphabet's Google has been declared a monopolist not once but twice by U.S. courts.¹³ Parallel to antitrust efforts, Republican Senator Mike Lee has introduced the AMERICA Act, an important piece of legislation that seeks to address the conflicts of interest inherent in giants like Alphabet owning all sides of the advertising market,¹⁴ akin to a bank owning the same stock exchange it competed with other traders on.

This pre-existing monopoly problem is now compounded by the threats we face to our sovereignty. First, these markets and platforms are core to the survival of the Canadian news industry, a pillar of a healthy democracy. Publishers, traditional and upcoming alike, are vulnerable to the shifting whims of these companies. Local news media in Canada is in steep decline, owing in large part to advertising revenue being coopted by online search engines and social media.¹⁵ While recently global news sites have seen an increase in referral traffic to Meta, this occurs only after a 2022 across-the-board collapse as the company attempted to distance its platforms from so-called political content.¹⁶ These companies also have a profound ability to shape the information presented to Canadians, whether it's Meta's decision to ban Canadian news in the wake of the Online News Act or the consistent meddling of Google employees in the supposedly neutral result of its monopoly search engine.¹⁷ This power was worthy of concern when the consequences were primarily economic, but in 2025 paired

with a more hostile United States they present an intensified kind of threat, potentially serving as vectors for disinformation, as the Media Ecosystem Observatory observed during the 2025 Federal Election.¹⁸

Computing Power and Infrastructure

If digital advertising is the lifeblood of internet services, computing power and cloud computing infrastructure has become essential in delivering those services and to enabling businesses well beyond digital markets. The investments in hardware that used to make up the traditional IT spend of businesses small and large has given way to cloud computing offerings such as Infrastructure as a Service (IaaS), Platform as a Service (PaaS), and Software as a Service (SaaS) that support businesses operating in all manner of industries. The tradeoff is one of convenience for control, where businesses receive plug and play offerings in exchange for growing reliance on a provider for the day-to-day operation of their business.

A growing number of Canadian businesses are making this tradeoff. As of 2024, 48% of Canadian businesses with over five employees reported using some form of cloud computing service in their operation, with the figure jumping to 81% for businesses in the information and cultural industries.¹⁹ Access to computing power is essential for businesses in software and service development, but also for traditional business functions— for accounting, client and vendor management, file storage, accepting payments, and keeping inventory. Interruptions to these services could leave thousands of businesses unable to operate, and perhaps unable to recover their data.

The government of Canada has also invested deeply in cloud computing services, with Microsoft capturing over \$200 million of the government's approximately \$300 million of spending on cloud computing between 2019 and 2023.²⁰ As the federal government expands its use of these capabilities, the delivery of a growing number of government services will depend on access to cloud computing. For businesses and government alike, continued operation depends on a monopolized market of American firms.

The state of concentration in the market for cloud computing, while not as intense as online advertising, exhibits a familiar structure. The market for cloud computing is an oligopoly, with Amazon, Microsoft, and Google alone controlling roughly two-thirds of the global market.²¹ Cloud computing has become essential infrastructure for both private and public services, and its concentration in the hands of a few firms presents an additional risk. An oligopoly cloud market increases the fragility of the system and exposes the global economy to attacks

and accidents alike. When so much of global compute is handled by a single company, that company becomes a more consequential target for attack or error. We saw a fraction of the potential consequences of this consolidation when the CrowdStrike outage took down the Microsoft operating system around the world and essential infrastructure along with it.²²

But in today's geopolitical climate the issue is one of not just concentration but of control as well. In a prescient 2023 report, researchers at the Dais noted that "access to US-based cloud computing infrastructure depends on a reliable American policy regime around data protection, and access for non-US-based companies."²³ While it's unlikely the author's understood the extent of the risk that Canada would face today, their concern is an important reminder that Canada's dependence on a small handful of foreign firms has been a risk long before the second Trump administration. It is no longer an outside risk that, despite commitments from companies like Microsoft, continued access to cloud computing services becomes a point of leverage in the dealings of the Trump administration with countries around the world.²⁴

Artificial Intelligence

One of the industries consuming the fastest growing share of this computing power is artificial intelligence (AI), seen as the next frontier for technological development and key to the future economic success of companies and countries around the world.²⁵ While the ultimate capabilities of these tools are evolving, the use of generative AI tools in the process of gathering and synthesizing information is growing at a rapid clip. Though far from declaring Google's monopoly in search a thing of the past, chatbots like ChatGPT have garnered hundreds of millions of users in a relatively short time frame and are increasingly common tools for users of all kinds.²⁶

With concerns flowing from but not limited to the highly concentrated market for computing power, there are several dimensions to the monopoly problem in the markets for AI. At the base of the AI supply chain, companies like Taiwan Semiconductor Manufacturing (TSMC) and the American company NVIDIA design and produce the lion's share of the advanced chips used to train and run AI models. Model development is not simply a matter of computing though, and the training of those models also relies on the vast stores of data held by companies like Google that have already been the subject of long running worries about the potential for data as a competitive moat for entrenched gatekeepers. At the application layer everyday users are most familiar with, names like Amazon, Apple, Google, Meta and Microsoft use a web of partnerships and investments to extend their monopoly power into this emerging market.²⁷

The increasing use of monopolized artificial intelligence tools presents a range of potential harms, including AI-facilitated surveillance and exploitation of workers, the manipulation of minors and other vulnerable populations, and undermining national resilience and security. Perhaps most concerning, however, is the power to appear as a neutral source of accurate information in an increasingly polarized world. It is now clear that these services hold the power to shape access to information for individuals around the world to further the political aims of those that control the switch.

The potential to use GenAI for political manipulation was made clear in a particularly ham-fisted example courtesy of Elon Musk's xAI and its Grok chatbot. After users reported a string of Grok responses bringing up the so-called "white genocide" in South Africa completely unrelated to user prompts, it was revealed that the response had been hard coded into the platform by a "rogue employee."²⁸ While Grok is by no means dominant in the market, the event is a clear example of the ability to insert editorial and political points of view into supposedly neutral tools for gathering and synthesizing information.

While a particularly inept attempt may generate more derision than concern, the Grok event alerts us to the danger of more subtle and sophisticated actors abusing these tools for their own interests. Concerns about the control of information flows through AI is only the most recent iteration of worries about the ability of dominant American platforms, such as in search and social media, to shape the information environment around us without our knowledge or control. Today, four in ten Canadians report having used AI in the past three months, and we should expect that number to rise in the coming years as the tools become more commonplace.²⁹ Whether Canadians will be able to have any assurance or oversight of the tools they use to understand the world around them remains to be seen.

Revisiting the Assumptions at the Heart of Canada's Approach to Digital Gatekeepers

Throughout our history, Canadian citizens and policymakers have understood that Canada's economic infrastructure required fair rules of the road to ensure the public interest was met while pursuing economic objectives.³⁰ The history of the implementation of this understanding is decidedly mixed, though recent developments provide the grounds for optimism.

On the competition policy front, in 2022, 2023, and 2024, Canada embarked on a series of reforms that strengthened our approach to reigning in economic gatekeepers, domestic and foreign alike.³¹ Those reforms are already showing

fruit through investigations and lawsuits brought by the Competition Bureau, Canada's competition cop, against entrenched incumbents like Google in online search and Loblaw's in retail grocery.³² On the communications policy front, legislation like C-11 and C-18 have recognized that companies operating channels of communication, from telecommunications and internet service providers to companies providing internet search and social media, have obligations to Canadians above and beyond traditional economic regulation, but have made narrow challenges to that gatekeeping power.³³

To date, Canada's attempts to regulate Big Tech firms have been based on a set of assumptions about their relationship with the U.S. government and the U.S. government's relationship with Canada. We can no longer take for granted that the U.S. government respects Canadian sovereignty, and we should expect these companies to follow suit. How we communicate with one another, understand the world around us, and engage in commerce is ever more mediated by firms that can no longer be trusted to operate in alignment with our interests. Canada's approach to policy in each of these areas will need to adapt to the new environment created in the wake of these shifting assumptions.

The Path to Reaffirming Canada's Digital Sovereignty

Rather than retreating, Canada's task today is to forge a more independent place in the world while integrating more deeply into the global system. To do so, we must update our assumptions and revisit national questions we long considered settled. In the coming months, CAMP will be engaging domestic and international experts on the topic of how best to preserve Canada's independence amid the dual monopoly and sovereignty threats posed to the country amid a rapidly evolving relationship with the United States. The discussions and proposals arising from them will seek to answer four questions:

- How can Canada guarantee reliable, sovereign access to critical digital infrastructure, when that infrastructure is currently the domain of a tight oligopoly of American firms?
- What new or strengthened policy tools are needed to rein in the power of digital gatekeepers, and how can Canada ensure those policies have teeth?
- What mix of public investment, industrial policy, and procurement strategy is needed to foster domestic or allied alternatives to American platforms in important digital markets?

- How should Canada collaborate with like-minded countries to resist pressure to weaken regulation of digital gatekeepers and engage in joint efforts on shared policy goals?

Conclusion

The assumptions of an always-friendly United States and arms-length tech giants have proven false, leaving Canada in the early stages of a gatekeeper crisis where we find ourselves exposed and dependent on foreign platforms for our digital infrastructure. Although the future is far from certain, meeting this threat demands a decisive strategy. Choosing the right path will mean the difference between a sovereign Canada that shapes its own destiny, and a vassal state whose economy, public sphere, and national security are rewired to serve the whims of Washington.

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