Digital Sovereignty

The new boardroom imperative

For decades, organisations optimised for efficiency. The next decade will belong to those that can combine efficiency with resilience. As dependence on cloud, AI and global digital ecosystems grows, boards face a critical question: **is our resilience at risk?**

Digital sovereignty helps organisations answer that question. It enables deliberate decisions about control, dependency and risk across data, technology operations and governance, helping build resilience without limiting innovation.

Digital sovereignty is not about isolation, but retaining the freedom to innovate on your own terms. It ensures critical decisions remain in your hands when technology, regulation or geopolitical conditions change.

Why the agenda is accelerating

Geopolitical volatility	Dependencies can disrupt access to critical technologies and services.
Regulatory scrutiny	Expectations around data, AI governance and resilience continuously increase.
Cloud & AI dependency	Dependence on specific providers creates concentration and portability risks.
Operational resilience	Focus is shifting from compliance to continuity through disruption.

Four questions for the boardroom

01 Critical dependencies

How **vulnerable are your most critical systems, data, and key third parties to geopolitical, legal, or jurisdictional changes,** and could you keep operating if those conditions shift?

02 Continuity & recovery

How **resilient are your critical operations** if key suppliers, services, or regions become unavailable, and can you continue to operate?

03 Control & accountability

Do you have the **right legal, regulatory, and workforce safeguards to stay accountable, keep control of your critical operations and data, and continue operating** if rules, access, or key personnel change?

04 Proportionate choices

How **secure and under your control are your core technologies, data, applications, and AI and can you keep operating, maintain governance, and move or recover them** if a provider, jurisdiction, or key dependency changes?

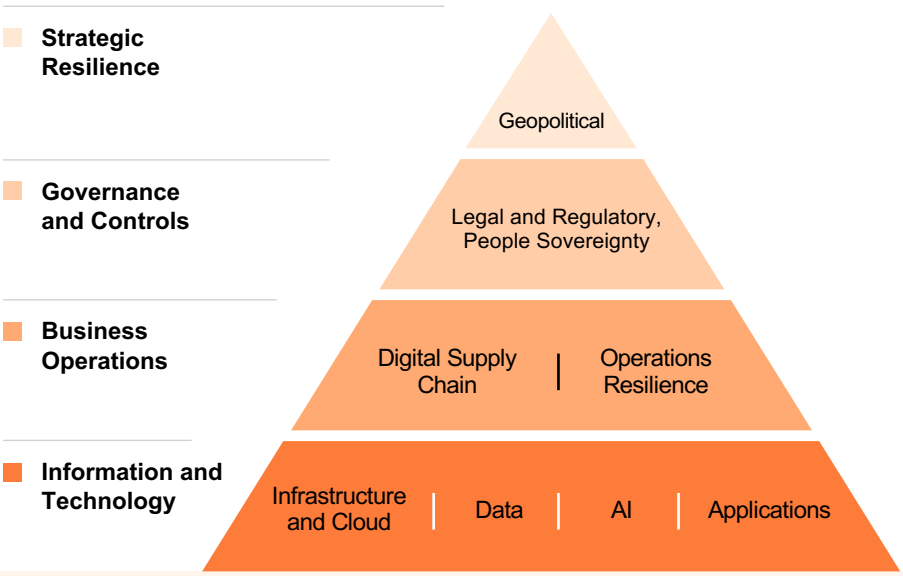
The strategic question: If a key provider, jurisdiction, supplier or technology platform became unavailable tomorrow, could your organisation continue to operate?

Digital sovereignty helps leaders identify where control is critical, dependency is acceptable, and resilience must be strengthened. Those who act early will be better positioned to protect operations, accelerate innovation and compete with greater confidence.

A practical starting point

Assess sovereignty across the whole enterprise

A robust view connects technology choices to business continuity, governance and geopolitical exposure.



Organisations are already acting on it

Source:
PwC's 2025 EMEA Cloud Business Survey (2025), based on responses from over 1,400 business and technology leaders across EMEA.

82% are adapting cloud strategies to geopolitical and regulatory change.

94% plan cloud architecture changes to improve scale, flexibility and sovereignty.

79% already use multiple providers to improve resilience and flexibility.

86% consider AI capabilities a key provider selection factor.

Moving from assessment to transformation

PwC works alongside you to:

Assess

Create a risk-based view across cloud, data, AI, operations, suppliers and workforce dependencies.

Prioritise

Define the required level of control by critical asset and agree pragmatic trade-offs.

Transform

Turn sovereignty insight into broader business action that strengthens resilience, trust, and long-term competitive advantage.

Start with the decisions that matter most.
A focused sovereignty assessment can establish your current exposure, define a target position and build an actionable roadmap aligned to strategic priorities. PwC combines deep industry experience with practical insight to help you shape your sovereignty strategy and strengthen resilience where it matters most.

Contact us



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