DIGITAL SOVEREIGNTY

HCLSoftware Summit Berlin 2026

Sovereignty needs to become a strategy, not a compliance option.

Why architecture options is the next CIO mandate

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HCLSoftware

Most of the decisions that will shape your business in 2030

are being made in your architecture meetings in 2026.

You probably didn't know

Estonia

Legal
Control

70%

AWS/Google/MS
Clouds

15%

European
Clouds

German AI Computing

T-Systems
50% increase

Sovereign

But is it legal

Risk

No longer
compliance

Sources : T-Systems, Medium, Digital Chefs

Sovereignty needs to move from the compliance column to the strategy column.

The overperforming CIOs in the next three years will be the ones who treat it that way

Every European CIO is feeling the tension right now – are you ?

WHO	WHERE	HOW	WHAT
Partner	Operate	Shift	AI models

Sovereignty should now be an enabler of strategy, not a constraint on it.

Do you have a plan B, today?

Exposure

Warm standby

THE CUSTOMER EVIDENCE

Three CIOs. Three industries. One pattern.

01 / FINANCE

When architecture constrains strategy.

02 / INDUSTRIAL

When data topology limits AI velocity.

03 / HEALTHCARE

When dependency becomes exposure.

01 / FINANCIAL SERVICES

“We didn’t realize we’d outsourced part of our M&A options to our cloud contract.”

— CIO, mid-sized European bank

Situation

Bank growing through acquisition. Core platform consolidated on a single hyperscaler in 2022.

Problem

Target in a different jurisdiction would delay close 9–12 months. Architecture was constraining strategy.

Outcome

Sovereignty moved from the compliance deck to the corporate strategy deck. Architecture now leads M&A.

02 / INDUSTRIAL · MANUFACTURING

“We stopped asking which model is best and started asking which model can come to our data.”

— CIO, European industrial group

SITUATION

Decades of proprietary engineering data. Board level appetite for serious AI investment through 2025.

PROBLEM

Frontier models required data to leave the environment. Redacted prompts couldn’t reason about what mattered.

OUTCOME

Hybrid model strategy: open-weight in the sovereign core, frontier via API at the edge. AI velocity unlocked.

03 / HEALTHCARE

“Resilience used to mean uptime. Now it means options.”

— CIO, multi-country European healthcare provider

SITUATION

Multi-country provider, critical patient services, well-run cloud-modernised IT organisation.

PROBLEM

Licensing changes, sovereign procurement frameworks, cross-border guidance. Repriced, not attacked.

OUTCOME

Deliberate dependency: choose where you’re locked in for value. Refuse it everywhere else.

ONE PATTERN

FINANCIAL SERVICES “Outsourcing options to a cloud contract.”

INDUSTRIAL “Which model can come to our data.”

HEALTHCARE “Decisions about us being made without us.”

From three different angles, one pattern:
Sovereignty isn’t compliance. It’s the architecture of your options.

THE PHOTO TO TAKE

The Sovereignty Audit

Five questions to ask your architecture team this quarter.

01	**If our corporate strategy changed tomorrow, how much of our architecture would have to change with it?**
02	**For the data that genuinely matters to us, can our chosen AI models come to it, or do we have to send it to them?**
03	**In the last eighteen months, which decisions about our cost base, compliance, or roadmap were made by someone outside our organization?**
04	**If our most important vendor doubled their price next quarter, what is our actual, not theoretical, response time?**
05	**When we say “hybrid,” do we mean an architecture, or a negotiating posture?**
06	**Have you set up an AI guild with an AI usage maturity model assessment?**

Sovereignty as the architecture of your options.

Thank you.