



Digital Sovereignty 2025 and beyond

How a CxO Survey works



Leverage our CxO survey to benchmark your organisation against key trends and tap into customer intelligence to create content that resonates and strengthens your brand's voice.



Our Value Proposition



Harness the power of your customers' voice. Receive engaging content and powerful market insights that will help you **position yourself as a thought leader.**

Leverage survey data from our quarterly CxO Surveys to produce your own custom thought-leadership content at a **fraction of the cost.**

Your **content is customized** to support your communication strategy with **reliable, valid and objective data points.**

Understand and target your European clients' use cases, challenges, investment priorities, opportunities and more

CxO Survey Topics 2025/26



Date of publication (The preparation of the questionnaire starts 2-3 months before publication).

The topics are examined in relation to their market maturity. The focus is on:

- Use cases
- Challenges
- Opportunities

Audience: CxOs, business unit managers, decision makers in user organisations

Scope: 550 responses: DE, UK, FR (100 each), IT, ES, Benelux, Nordics, AT & CH (50 each).

The story behind PAC's CxO survey on digital sovereignty - understanding needs, strategies, and challenges



In today's interconnected world, European organizations and governments alike are increasingly considering digital sovereignty as important due to its implications on security, privacy and resilience, to ensure economic, technological and geopolitical independence, and to meet regulatory requirements.

Having access to secure and compliant digital infrastructures will be key. Organizations from all sectors want to benefit from the innovative power of technologies like cloud computing or artificial intelligence as they are an essential basis for future data-driven business models.

With increasing interest from regulated industry sectors such as public sector, healthcare, defense, transport, energy or finance, and with the increasing adoption of digital technologies in critical areas such as R&D, personal data processing or critical infrastructures, strategic considerations around digital sovereignty become of greater importance. Digital sovereignty typically must strike a balance between the three aspects: degree of sovereignty, innovative power and costs.

Such considerations are additionally triggered by geopolitical uncertainties that Europe has not seen for decades. International cooperation based on common rules, shared values and stability seem to be more and more questionable, so that over-reliance on specific technologies or vendors creates vulnerabilities and can lead to reduced competitiveness, or to compliance violations.

Accordingly, digital sovereignty has become an increasingly important element of many organizations' IT strategies. Approaches towards digital sovereignty are manifold, ranging from insourcing strategies to modified public cloud and hybrid cloud architectures, to open-source approaches for software and AI models. Many cloud, software and services providers, global players just as local and regional vendors, are adapting their offers and go-to-market strategies in Europe accordingly - but often with an incomplete view of actual future demand.

What is the CxO's perspective on digital sovereignty?



Start: Q2 2025
Publication: July/August 2025

Lead Analyst of the study



Karsten Leclerque
Principal Analyst

This survey serves as a **barometer** for where and to what extent European organizations are facing **sovereignty-related concerns and challenges**, how they are **prioritizing technology investments**, and what **expectations they have of their IT partners**.

In view of a rapidly changing political and business environment, **monitoring the evolving needs and interests of CXOs** across industries and countries is crucial for understanding trends regarding strategies and restraints regarding infrastructure deployment models, data processing, security and privacy measures, software strategies, and operational measures.

Vendors and organisations alike can learn how best to engage and progress.

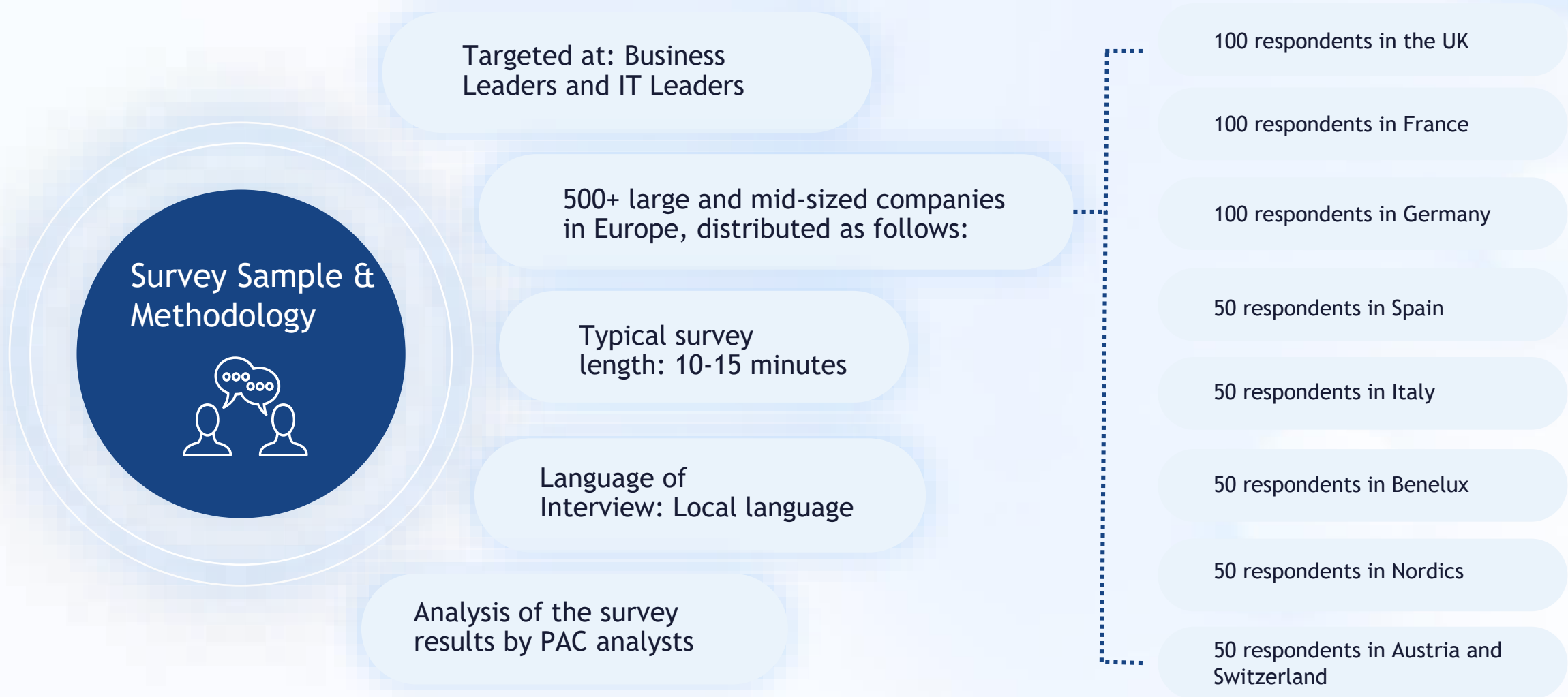
Finally, this CXO survey **enables benchmarking against country, regional, and industry trends** while surfacing pockets of excellence that can be studied and emulated. As European firms grapple with unexpected geopolitical uncertainties on the one hand and unknown technological dynamics on the other hand, **understanding organisations' challenges, strategies and expectations** can facilitate better engagement models for software companies, cloud vendors, consulting and service providers, as well as adoption approaches for organisations.

Key questions answered by this CxO Survey on Digital Sovereignty

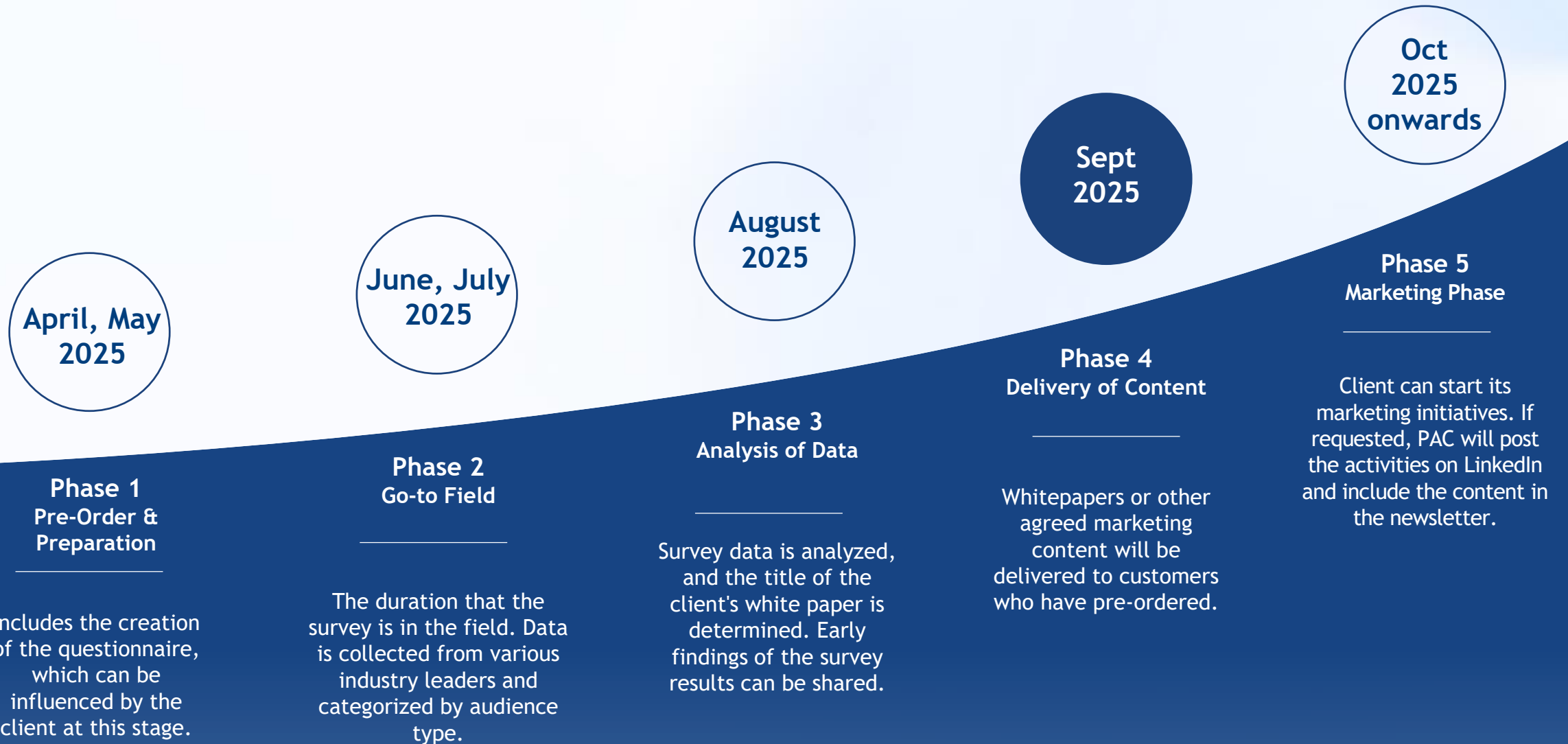


- How important is digital sovereignty to your organization's strategy?
- How does your organization define digital sovereignty? To what extent does your organization rely on external technology providers for critical infrastructures?
- How prepared is your organization to adapt to digital sovereignty-related policies and regulations?
- What are the biggest challenges your organization anticipates in reaching digital sovereignty?
- What are your top priorities regarding digital sovereignty (e.g., data, cybersecurity, infrastructure,...)?
- How does your organization navigate the balance between innovation and compliance with regulations?
- What measures has your organization taken to ensure digital sovereignty?
- What are your evaluation criteria when choosing a technology vendor or services suppliers?
- How do you perceive the role of governments and politics, industry, IT community and civil society in achieving digital sovereignty goals?

Sample & Methodology for European CxO Surveys



Timeline of CxO Digital Sovereignty



What comes after the survey and its analysis?



1

Define the title of the study

After you have selected the data set that you would like to use for your thought-leadership piece, a call with one of our Senior Analysts is arranged to discuss the angle of the whitepaper.

2

Table of Contents

Based on the initial brief, our Analyst will prepare a short ToC to validate the structure of the document with you prior to starting the write-up of the document

3

Write-up

When the title and ToC are confirmed, the analyst will start the write-up and leverage the data available for the selected geographies.

4

Draft for review

When the first version of the document is completed, the document is shared with you for review.*

5

Publication

After your feedback is received, the analyst will implement the necessary changes and produce a final version, ready for publication.

*When the title of the thought-leadership is defined, the paper will be delivered for review within four weeks.

Our References



Why PAC?

PAC is a leading industry analyst firm operating for more than 45 years in Europe. PAC works with the biggest names in the industry including Fujitsu, CGI, Atos, T-Systems, IBM, Accenture, and many more.

Why choose the CxO approach?

Using the CxO Survey data gives you access to fresh primary data at a fraction of the cost of a typical survey and provides you with a whitepaper unique to your company. The data collection is syndicated but the results are custom.

Can I use two small countries instead of a large one for my paper?

Yes, if you select the one country package, you can use 100 responses from our data set. These 100 respondents can come from one large country or two smaller geographies.

How long does it take?

12 weeks. The fieldwork of our CxO Surveys typically run for eight weeks, and the write-up of the whitepaper usually takes four weeks.

Can I add questions?

The questionnaire is prepared by our Senior Analysts. Suggestions before the start of the fieldwork are welcome and will be considered. If you wish to include 1-2 specific questions before the start of the survey, this can be arranged for an extra €2,200 excl. VAT per question. The responses of these will be exclusively available to you and not shared with other customers.

Can I also receive content other than a white paper?

Yes! We have created every form of marketing content in the past. Whether you're looking for content for a webinar, a presentation at a client or internal event, blog posts or simply smaller and engaging content, our analysts can deliver it.

