Welcome to the TELI Panel Discussion

Digital Sovereignty

A Pipe Dream or a Realistic Goal



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Agenda

- Opening Remarks by Arno Kral, President of TELI e. V.
- “Digital Sovereignty”—What Exactly Is It?
- Keynote Presentations: What Is the State of “Digital Sovereignty” in Germany and across the EU?
- Panel Discussion, Q&A
- Closing Remarks: Is “Digital Sovereignty” a realistic goal for Germany and the EU?

“Digital Sovereignty”—What Exactly Is It?

Digital Sovereignity = The ability to use technologies and data independently, securely, and in compliance with the law.

Key Pillars:*

- **Governance:** Legal and organizational frameworks that enable self-determination.
- **Technical Sovereignty:** Control over digital systems, software, and hardware.
- **Operational Sovereignty:** The ability to operate digital processes independently.
- **Data sovereignty:** Self-determined management of data, including its protection and use.

* Bundesdruckerei: Digitale Souveränität: Was ist das?, www.bundesdruckerei-gmbh.de/de/innovation-hub/digitale-souveraenitaet-was-ist-das, retrieved on October 27, 2026; reference to the European Commission‘s Cloud Sovereignty Framework

Sovereignty means freedom of choice, not isolation

Myth: Autarky

Complete technological self-sufficiency

Isolation from the global digital space

In an interconnected world, neither achievable nor desirable

Reality: Self-determination

Freedom to choose between high-performing partners

Acting with maximum self-determination in the digital space

Trustworthiness as a selection criterion, not origin alone

TrendAI™

Cybersecurity is the foundation of sovereignty



Self-determination

Sovereign decisions require secure and resilient technologies and infrastructures.



Room for maneuver

With their backs against the wall, companies and public authorities have no room for sovereign decisions.



Partnership

The global threat landscape can only be countered effectively with trustworthy partners.

TrendAI™

Thinking beyond Europe:
Japan

- Strategic partner sharing our values
- G7 member
- Adequate data protection
- No CLOUD Act
- Classified information Protection
- Cyber dialogue

TrendAI™

Beyond „Hosted in Europe“

it-sa Panel Discussion:

Digital Sovereignty – Pipe Dream or Realistic Goal?

29th October 2026

Oliver Paetz, Head of Product Management Secure Email
retarus GmbH



Sovereignty: Strategic Drivers

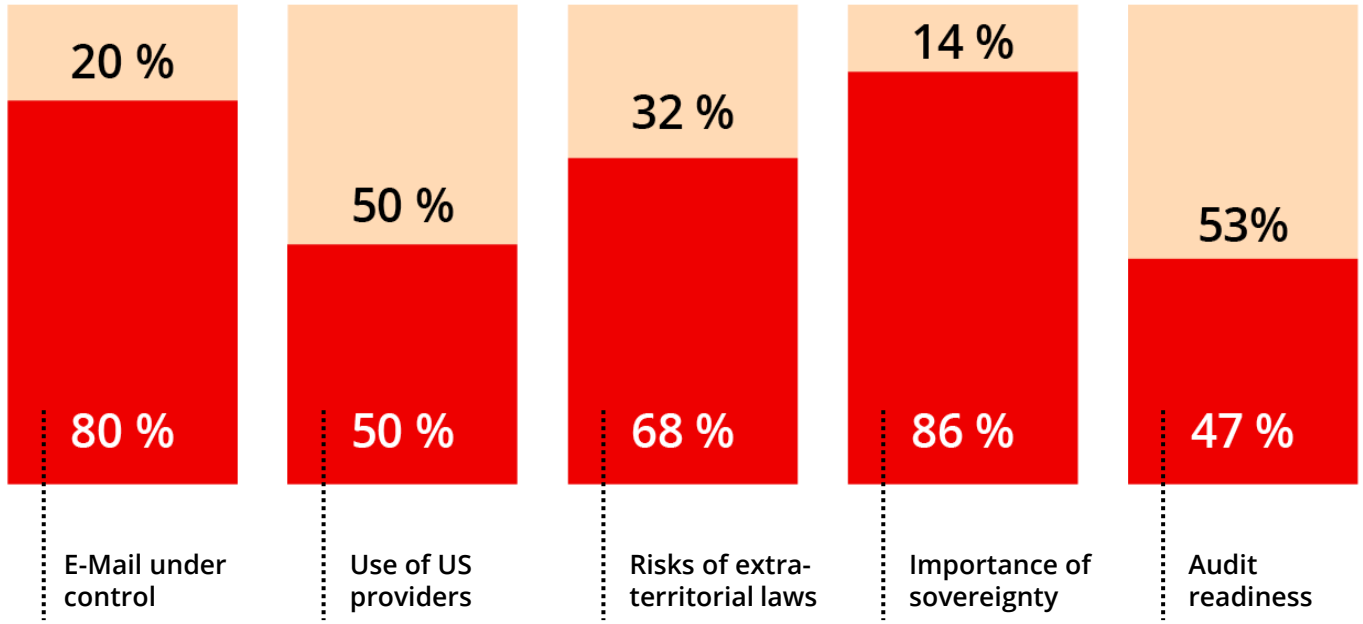
Big sovereignty topics driving strategic conversations

- Regulatory Frameworks
- Geopolitical Contexts
- Operational Realities



How Companies Really Feel About Sovereignty

Survey results among European decision-makers commissioned by Retarus





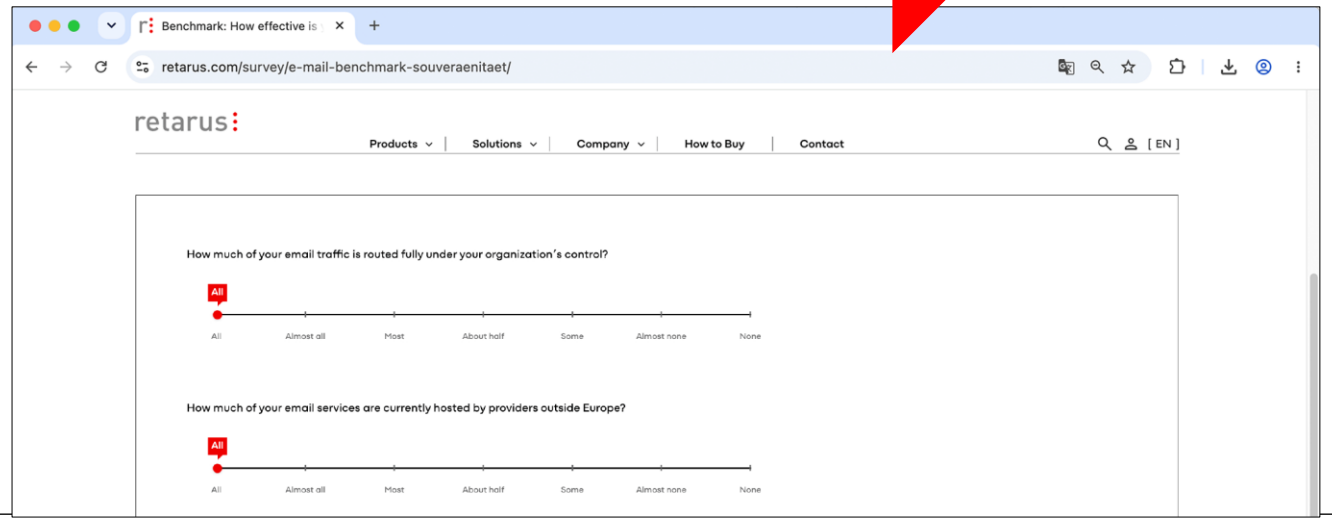
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How To Start The Journey

Honesty helps companies gain a clear picture of their current situation.

Observability & Transparency	Continuity & Resilience	Encryption	Compliance

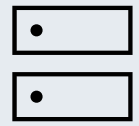
Benchmark: How effective is your email?



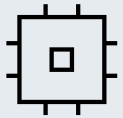
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Sovereignty isn‘t Everything.

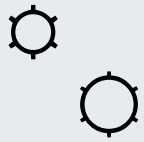
It’s all about what you can’t afford to lose control of.



Data



Technology



Operations



Regulations

Made in Europe

Thank you!

www.retarus.com



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Jani Ahosola

- Freelance tech journalist, board member of the Finnish Association of Science Editors and Journalists.
- Has popularised tech, automotive and science topics for millions of Finnish readers.
- Writes for various publications, most notably the news tabloid Iltalehti and the tech magazine Mikrobitti.
- Has lately been following digital sovereignty and cybersecurity closely.

Suomen tiedetoimittajain liitto

Finnish Association of Science Journalists

- Supports Finnish science journalists through training, events, and grants.
- 1100+ members.
- Aim is to develop science communication and the professional expertise of the members working in the field.
- Annually awards the Finnish Science Journalist of the Year and the Science Communicator of the Year.
- Member of EUSJA (European Union of Science Journalists' Association), WFSJ (World Federation of Science Journalists) and community member of EASE (European Association of Science Editors).

Where does Finland stand today in terms of digital sovereignty?

- Digital sovereignty is not a question for a single European country, but for the European Union as a whole.
- What digital sovereignty needs is European alternatives built on European standards and terms. Companies should follow European standards from the beginning, rather than us trying to catch up afterwards with restrictions and fines.
- European alternatives should be the first choice when selecting services, especially in the public sector and in companies critical to society.

- From Finland’s perspective, we have several companies providing alternatives and driving European sovereignty: for example the phone maker Jolla, the cybersecurity company WithSecure and Nokia, one of the world’s strongest companies in network technology. In quantum technology we have IQM, which builds quantum computers in Europe.
- There has been a public debate and a citizens’ initiative on sovereignty, because some of the services that government institutions plan to use for storing data come from outside the European Union. For example, part of our social security data is being moved to cloud services run by US-based companies. There was also a plan to store Finland’s election data on Amazon’s servers in Sweden, but it was put on hold this spring.
- Of course these companies say that they follow European standards and legislation and store the data within the EU. Fundamentally, it is a question of trust.

Where are the gaps in digital sovereignty?

- Above all in the level of service of the companies providing the alternatives. Their funding is nowhere near that of the main players in the field, and that affects the service. Instead of one big company like Microsoft, we have several smaller companies offering alternatives to the different services that Microsoft can deliver in one package.
- I think the financial side can be fixed simply by preferring European alternatives. The more customers and income there are, the more staff the companies can hire, and more staff can improve the service.
- The problem is that scattered companies and services attract less interest when big players provide everything in one packa package. That kind of power also lets them set prices in a way that makes competition difficult for smaller rivals.

Is digital sovereignty achievable, and if so, by when?

- I don’t have a crystal ball, but I’d say we’re on the right path. The change won’t happen soon, but developments in global politics have sped things up quite a bit.
- One of our biggest problems is that we don’t have leading-edge chip production in Europe. The new ESMC fab in Dresden is an important step, but it is majority-owned by TSMC and will make mature chips for cars and industry, not the most advanced ones. Most tech production is still highly dependent on chips and components made in the US, China, Taiwan and Korea.
- Price and scale are also major issues. Small producers cannot compete on price and volume, only on trust and quality.

What makes Finland better than other countries?

- If anything makes a difference, it is public awareness of the issue. People know that there are alternatives, they have a choice, and they can demand the same from the public sector.
- Another strength is the ability to look ahead: for example, Finland does advanced research on 6G technologies. We also have a lot of know-how left over from Nokia's golden era for building tech services.
- But I'd rather talk about what makes the EU a better place than others. We have strong values and strict requirements for data protection, and as a union we are the most advanced in these issues. Our institutions have shown that they can stand up to heavy lobbying by non-European tech companies.

What needs to be done?

- Prioritise European alternatives when choosing IT services.
- Companies should cooperate more to become more attractive. Scattered services are hard to approach.
- Increase public awareness of the European alternatives.
- Companies should be as transparent as possible and focus on trust and quality. That is their competitive strength.
- As consumers, we should vote with our wallets and prefer European technologies and service providers. We can also demand the same from our political representatives.
- We need to free our technologies from non-European supply chains and build leading-edge chip production in Europe as well.