OLIVER WYMAN

EUROPEAN DIGITAL SOVEREIGNTY

CONTENTS

EXECUTIVE SUMMARY

1. **Join forces to build 5G infrastructure.**

2. **Build a European distributed cloud and edge infrastructure.**

3. **Develop an industrial data strategy.**

4. **Develop a European cyber leader.**

Exhibit 1: Global digital information created per annum

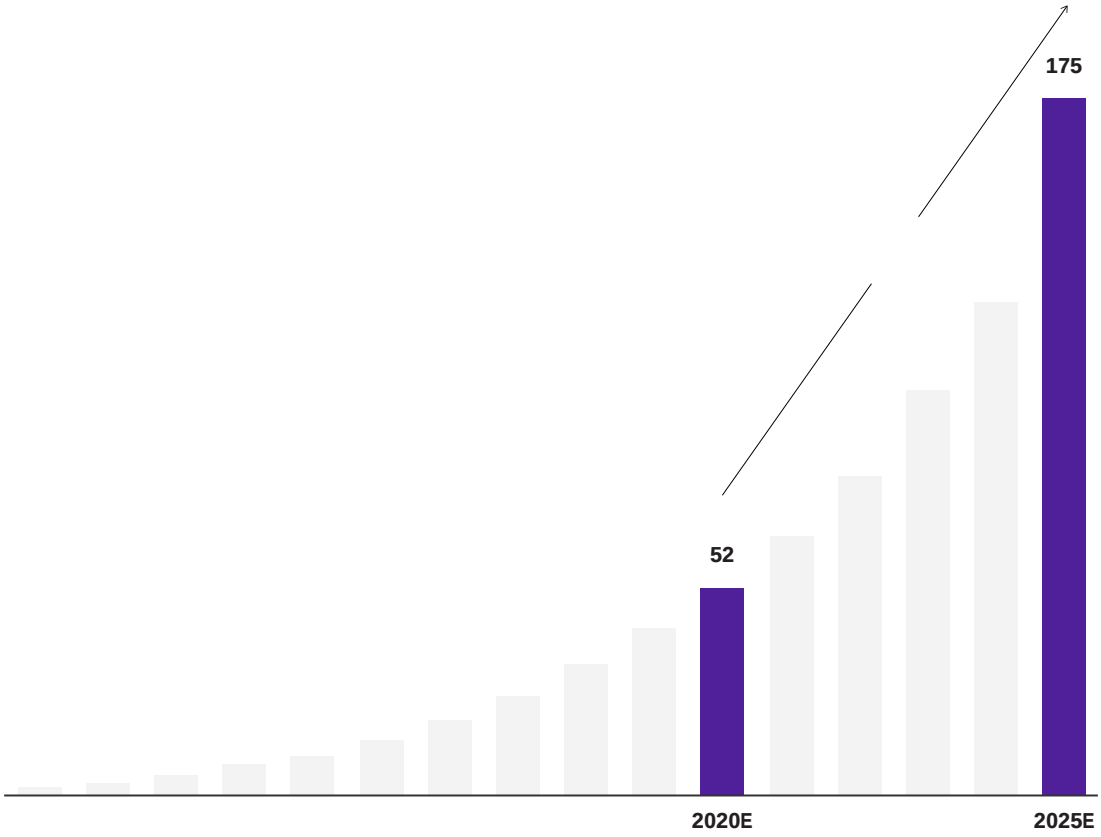
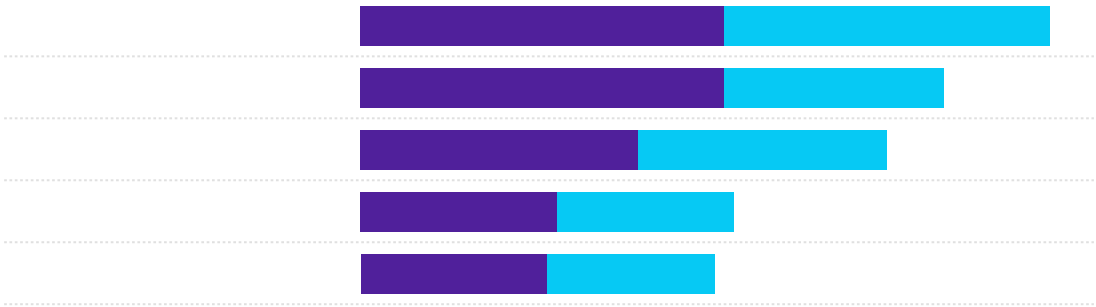


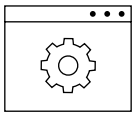
Exhibit 2: Total impact of the data economy per industry in the European Union



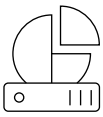
Use case #2

Remote

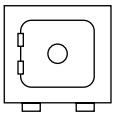
Exhibit 4: European data sovereignty



Algorithms and computational resources



Huge and quality datasets



Secure storage

THE NEXT DIGITAL WAVE: EUROPE, THE US AND CHINA

DIGITAL INVESTMENT AND SKILLS

Exhibit 5: Digital capabilities scorecard

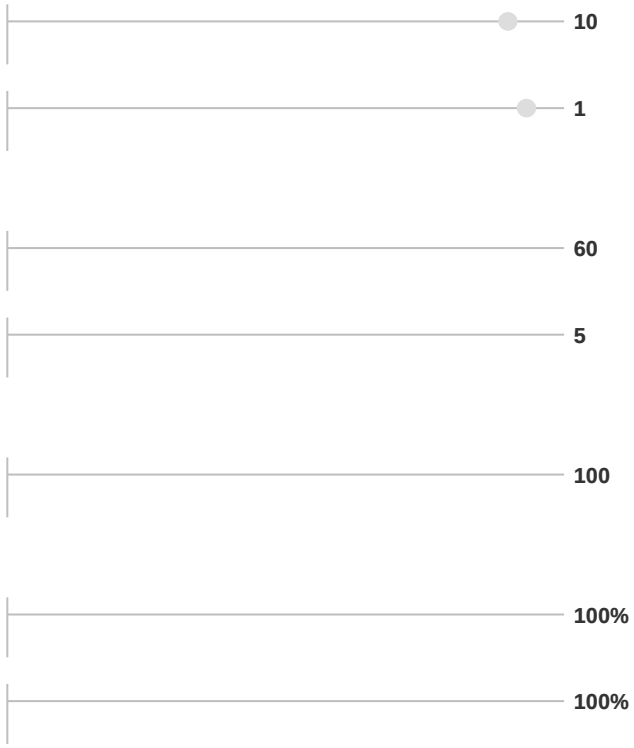
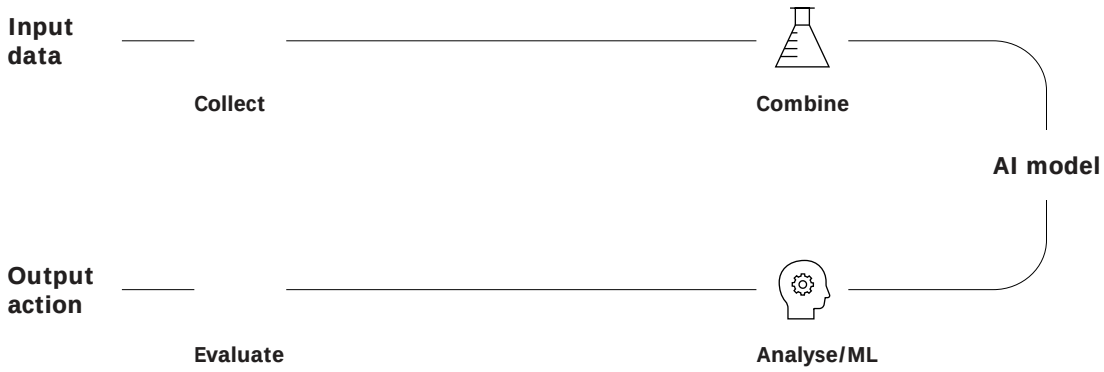


Exhibit 7: End-to-end data journey



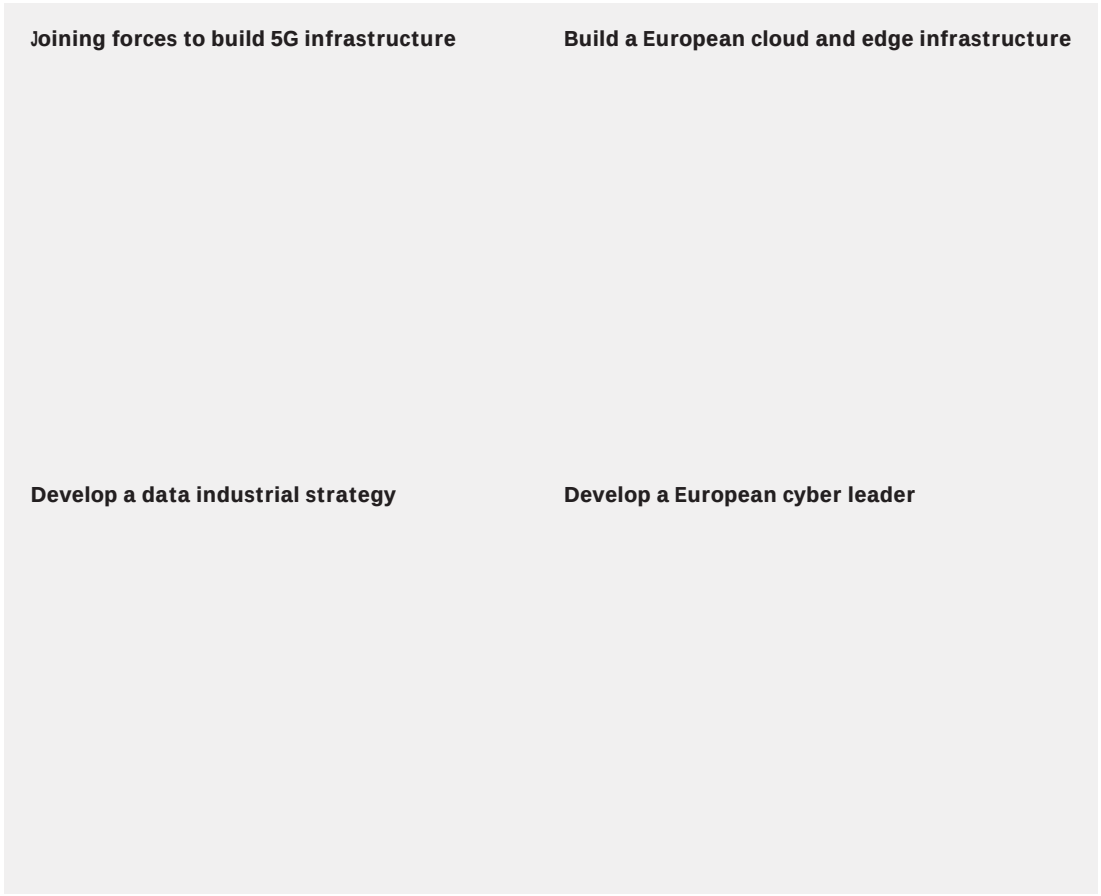
THE COST OF DIGITAL SOVEREIGNTY

€530 billion over five years

A DIGITAL ACTION PLAN FOR EUROPE

Xihuanet: China to lead global cybersecurity market growth in next five

Exhibit 8: Key European actions required



JOIN FORCES TO BUILD 5G INFRASTRUCTURE

Build an open, interoperable O-RAN infrastructure.

Radio Access Networks (RAN) are antennae that facilitate the connection of devices over a network. In the past they were built using vendors' proprietary technologies, which had limited

Focus on vertical industries relevant to European competitiveness.

Design fit-for-purpose 5G regulation.

Support infrastructure creation.

BUILD A EUROPEAN CLOUD AND EDGE INFRASTRUCTURE

Support a pan-European project to build a distributed cloud and edge infrastructure.

Store data in Europe and encourage the use of European domain names.

DEVELOP A EUROPEAN CYBER LEADER

Link European defence budgets and cybersecurity.

Support voluntary data sharing.

Build a European cyber-expert campus.

Build European standards.

CONCLUSION

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