



Sovereignty Matters

A global blueprint for sovereign, agentic,
and generative AI

*An economic model for success derived from 2,050 interviews
with leaders in enterprises from around the globe*

2025



Executive overview

The critical role of AI and data sovereignty in future-proofing enterprise AI



Sovereignty over AI and data is emerging as the defining factor for enterprises aiming to harness the full potential of agentic and generative AI (GenAI). A global study spanning 13 countries found that 95% of enterprises aim to establish their own AI and data platforms within three years. Of these, 25% want to achieve this immediately, and 75% within the year.

This urgency is driven by the need to manage real-time synergy between AI and data while ensuring compliance, security, and trustworthiness. Without sovereignty, AI initiatives risk failure due to siloed data and noncompliance, where even one failure can compromise entire ecosystems. This is especially critical as agentic and GenAI are projected to contribute more than \$1 trillion to global GDP by 2028.

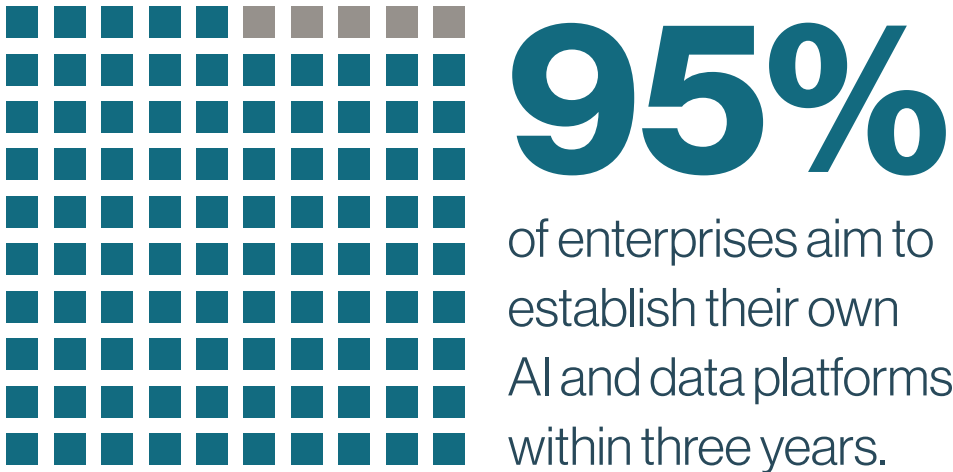
Trust and scale are key barriers: Over 50% of AI experiments never reach production, and only 1% of AI in production delivers transformational value. Yet 13% of enterprises surveyed in May 2025 have made the shift successfully. These leaders are achieving 5x greater ROI, 5x the innovation gains, and 2x more mainstream agentic AI deployments than peers. They also believe—2.5x more than others—that AI will make them industry leaders. These top performers share one trait: full sovereignty over their AI and data.

AI and data sovereignty allows them to access, manage, and deploy data securely and compliantly across environments. Their strategies have been validated across 15,000 simulations and 500+ variables, showing a 0.932 correlation between sovereignty and success in economic, innovation, efficiency, and strategic confidence metrics.

Sovereign AI empowers organizations to:

- Achieve 5x ROI
- Deploy 2x more agentic/GenAI apps in production
- Be 2.5x more likely to lead their industries
- Solve for compliance, security, and agility
- Scale across hybrid and Postgres® environments (40% and 20%–25% respectively)

While countries such as the UAE and Saudi Arabia are ahead, others, including the U.K. and Japan, lag. The conclusion is clear: Achieving sovereignty now is critical for building trustworthy, high-performing AI foundations for the future.



Disrupt or be disrupted



The agentic AI and GenAI revolution

GenAI and agentic AI are poised to dramatically transform how we work, redefining every organizational function—from front-office customer interactions to back-office operations—and reshaping entire business ecosystems.

The marriage of AI and data

The powerful marriage of AI with the data that fuels it is projected to generate the world's third-largest economy by 2030. Despite this immense potential, McKinsey estimates that only 1% of AI projects currently deliver truly transformative results.

Disrupt or be disrupted

We talked with 2,050 executives from major enterprises in 13 countries across the globe. We looked at four areas to determine whether they are thriving.

- The levels of organizational commitment to three key data and AI themes
- How their current data and AI infrastructure functions (hybrid, cloud, on premises)
- What drives their data and AI strategy initiatives
- How they specifically measure ROI across the selected AI initiatives

\$15.7 TRILLION

PWC: AI AND DATA WILL CONTRIBUTE \$15.7 TO THE GLOBAL ECONOMY BY 2030.

\$1.77 TRILLION

FORRESTER: THE GLOBAL AI MARKET WILL REACH \$1.77 TRILLION BY 2032.

Global research with your peers

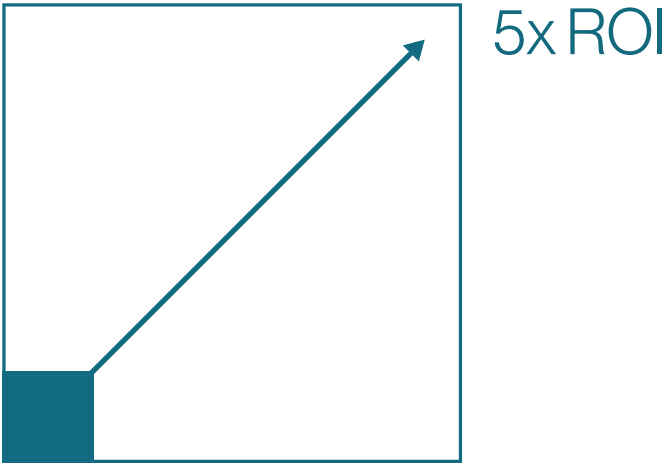
Deep measures to drive design

The modeling was designed to deeply examine these leaders' strategic and tactical execution, revealing the reasons behind the success of some—and the stalling of others.

We used detailed measures of intent, expectations, design, and data infrastructure to dissect the DNA of success.

- 15 intelligent agentic and GenAI application areas
- 7 ROI metrics
- 6 Major DB workloads

The 13% who succeed see 5x the ROI of others.



A universe of 134,000 enterprises

The data represents the behaviors of 134,000 enterprises with 500+ employees in each of the countries.

The model explains 93.2% of the variance in the data.

The dynamic is fast and expansive

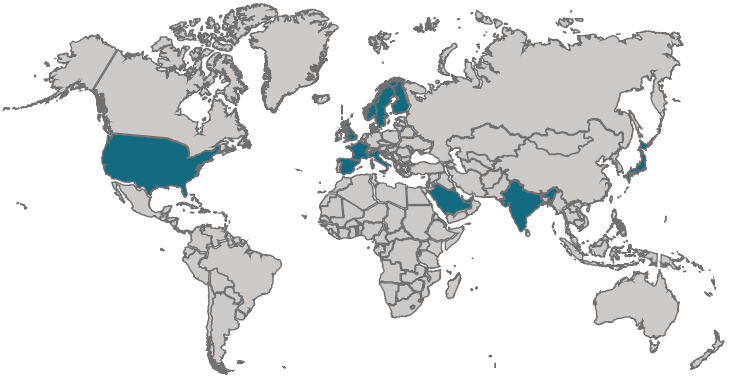
The desire to be an AI and data platform
CAGR over the next three years: 49.4%

The desire to have sovereignty over their AI and data
CAGR over the next three years: 35.7%

The belief that the marriage of AI and data will be a key strategic requirement
CAGR over the next three years: 50%

Countries

- USA
- UK
- Germany
- France
- Italy
- Spain
- Denmark
- Sweden
- Norway
- Middle East (UAE & KSA)
- India
- Japan
- Singapore



Industries

- Automotive
- Banking/Financial Services
- Energy Production/Utilities, Oil & Gas
- Insurance
- Manufacturing/Industrial
- Medical/Healthcare/Pharmaceuticals
- Medical Technology
- Technology: Hardware, Software, Services
- Telecommunications, Carriers
- Transport, Logistics

We all fit into one of four groups

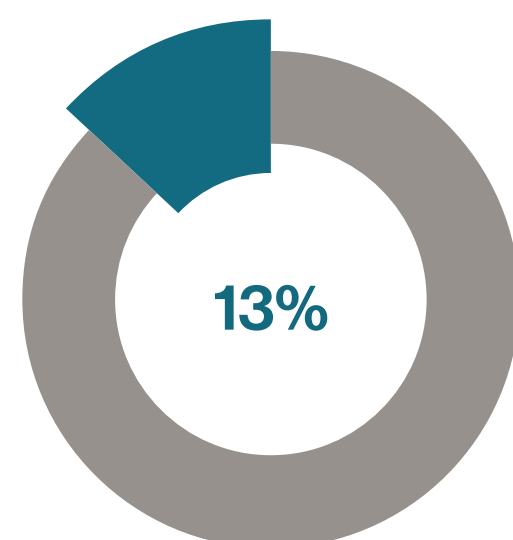
There is an optimal position

For all the aspiration to growth over the next three years, only a small portion (13%) are doing it the right way now to achieve the highest level of ROI.

These high performers believe in the absolute necessity of achieving all three components for success now.

They believe:

- It's mission critical to get total sovereignty over their AI and data.
- AI and data need to be married in the infrastructure now.
- They should be their own AI and data platforms now.



The top indicator of success is a 90% guarantee

We conducted 15,000 simulations of design, performance, and intent across 500 variables to understand the strongest drivers for success. We used a CHAID analysis to categorize enterprises into four segments.

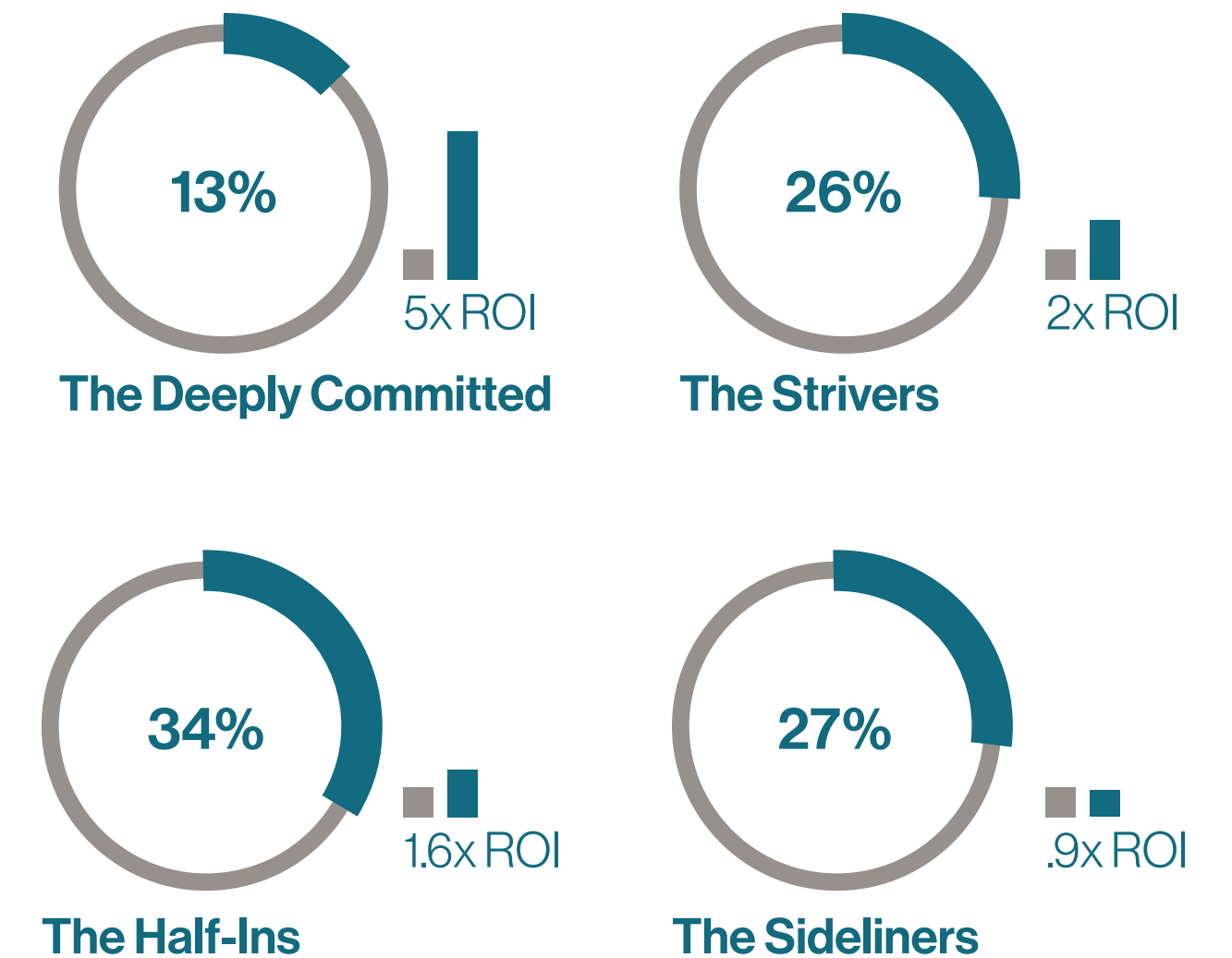
The model explains 93.2% of the variance in the data.

You will fall into one of four segments

Every enterprise falls into one of four segments:

- The Deeply Committed
- The Strivers
- The Half-Ins
- The Sideliners

Each segment needs to focus on a different set of priorities to achieve success with their agentic AI and GenAI investments.



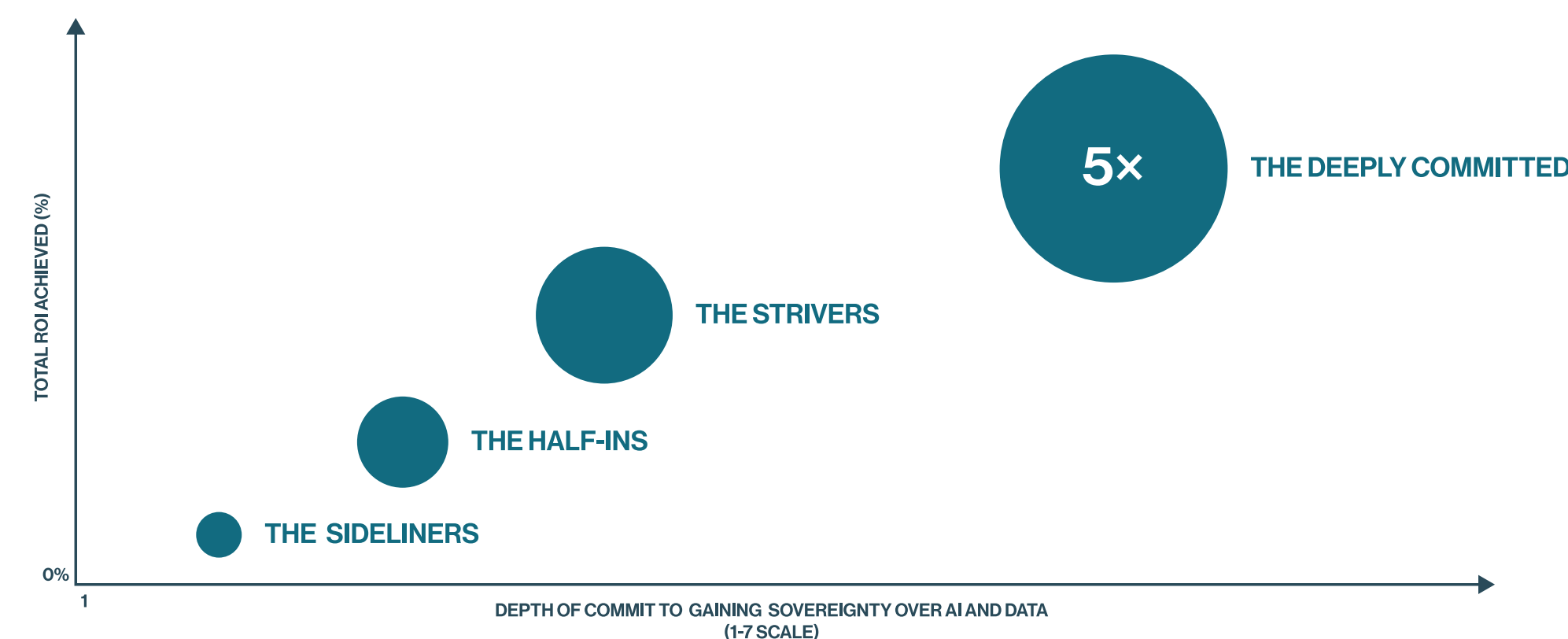
The Deeply Committed get 5x the ROI



Thriving organizations benefit from four unique rewrites of the normal rules

Those organizations most deeply committed to the idea of data and AI sovereignty get 5x more ROI than the others, but not only because they built their agentic AI and GenAI sovereign data infrastructure first; they have also—by design or by default—rewritten traditional business rules for themselves.

The Deep Committers to data and AI sovereignty **win 5x and do 2x as much** agentic and GenAI



1

Solve needs in parallel
Instead of having to solve for secure and compliant or access or scale, the Deeply Committed can do it all at the same time.

2

Realize the right ROI mix
The Deeply Committed deliver a portfolio of ROI metrics from each of their agentic AI and GenAI mainstream production investments.

3

Achieve parallel objectives
To the Deeply Committed, agentic AI and GenAI genuinely solve for a range of business objectives, providing a new engine for their businesses.

4

Get the agentic flywheel
The Deeply Committed comprehend the ROI ceiling for each agentic AI or GenAI area and move on to the next with confidence, as if they had an AI factory.

Solving three challenges to succeed



Solving for these 3 priorities together is key

The best data infrastructure can:

- Be secure and resilient
- Deliver data localization at scale
- Give your enterprise data ownership and control

Top Priorities	Top 4 Choices
Security and resilience: Data and AI systems are protected against cyberthreats and foreign interference. Robust encryption, access controls, and disaster recovery strategies are in place.	85%
Data localization: Sensitive data is stored and processed within the country of origin to comply with regulations. Ensures protection from foreign influence, surveillance, or unauthorized access.	74%
Data ownership and control: The data is owned, stored, and processed within a specific jurisdiction. Organizations or governments retain full control over how the data is used, accessed, and shared.	72%
Legal and regulatory compliance: Adheres to national and international data protection laws (e.g., GDPR, CCA, AI Act). Aligns with cybersecurity frameworks and sovereign governance policies.	39%
Independence from foreign tech dependencies: Minimizes reliance on foreign cloud providers, AI models, and software. Encourages domestic innovation in AI and computing infrastructure.	32%
Trust and citizen rights protection: Ensures individuals have control over their personal data. Protects privacy and fundamental rights in AI applications.	29%
Interoperability and open standards: Encourages collaboration within sovereign ecosystems. Uses open source AI frameworks or proprietary solutions that comply with local standards.	27%
Economic and strategic value: Supports local industries, research, and economic development. Encourages AI sovereignty to maintain competitive advantage and national interests.	23%
Ethical and transparent AI: AI models are built with fairness, explainability, and bias mitigation. Ensures that AI decisions align with national values and ethical guidelines.	20%

Tier One

The key drivers for success



Agentic AI and GenAI data infrastructure needs to:

- Solve for all these requirements at the same time. Only the 13% most Deeply Committed can deliver these simultaneously, because they have made sovereignty over their AI and data the mission-critical foundation for success.
- Be more in control.
- Manage changing cybersecurity profiles.
- Handle changing regulatory compliance needs.
- Be independent of infrastructure lock-in.

The need to be more in control of all data (on and off platform) in a compliant way	Tier One
Changing cybersecurity profile needs that demand more integrity	Tier One
Changing regulatory compliance with local rules and regulations	Tier One
The need to be independent of infrastructure lock-ins (open standards APIs, open contracts, etc.)	Tier One
The need to be more agile for the future with AI	Tier Two
Changing perceived value of data to drive differentiation	Tier Two
Changes in how competitors are using their AI and data	Tier Three
Changes in geopolitical and economic uncertainties	Tier Three
The need to reduce IT costs relative to ROI	Tier Three

The key drivers for success

Where is your organization?



Look for signs of your organization's current design and execution in these segment descriptions.

The Deeply Committed (13%)

Nine in ten of them believe in the absolute mission criticality of getting true AI and data sovereignty for themselves now, so they can control all their data (out of silos), respond to the market conditions of competitors, and sustain all security and compliance needs. 49% of their workloads are designed in a cloud-like experience, but across clouds and on premises. 19% of them are very committed to considering Postgres to deliver this data layer for them. They know the likely cap for ROI in each intelligent application area and are looking to create an integrated portfolio that is sovereign and secure across data estates.

Enterprises here are more confident (by 2x) about their ability to be leaders going forward than any other segment, even though 95% of them do not consider themselves to be leaders right now. They see AI and data sovereignty (access to all data, secure and agile in a cloud-like experience) as mission critical.

The Strivers (26%)

They understand the importance of delivering data and AI sovereignty for their organizations, but they are not well organized to scale, covering half as many areas of agentic AI and GenAI and achieving 50% less mainstream use. They have the right data management (Postgres is considered for this work by 38% of them). 43% of their workloads are designed as a cloud-like experience across clouds and on premises, but they are mostly driven by compliance and regulatory pressures, versus capturing share or responding to competitor changes.

The Half-Ins (34%)

They believe in the idea of sovereignty over their AI and data, and especially in the need for interoperability across their data estates. 38% will consider Postgres, and nine in ten of these enterprises already have their Postgres across clouds and on premises. This is the group most concerned about the need to be able to respond to the geopolitical landscape. Expectations for ROI in this segment are heavily focused on the ability to become more innovative.

The Sideliners (27%)

Their low belief in the economic power of AI and data sovereignty is a major barrier to delivery of value for their agentic AI and GenAI activities. Drivers for overall data and AI strategy for their organization are in line with the wider market drivers for strategy: the need for more data control (28%), cybersecurity (24%), compliance management (24%), avoiding infrastructure lock-in (23%), and gaining more agility for their AI needs (23%). This segment considers Postgres (38%), and it is the least hybrid data infrastructure of all segments. Their key agentic AI and GenAI focus is in legal and procurement of intelligent applications.

The winners win in multiple ways

The winners are clear

13% of the enterprises surveyed delivered 5x the ROI of most other enterprises.

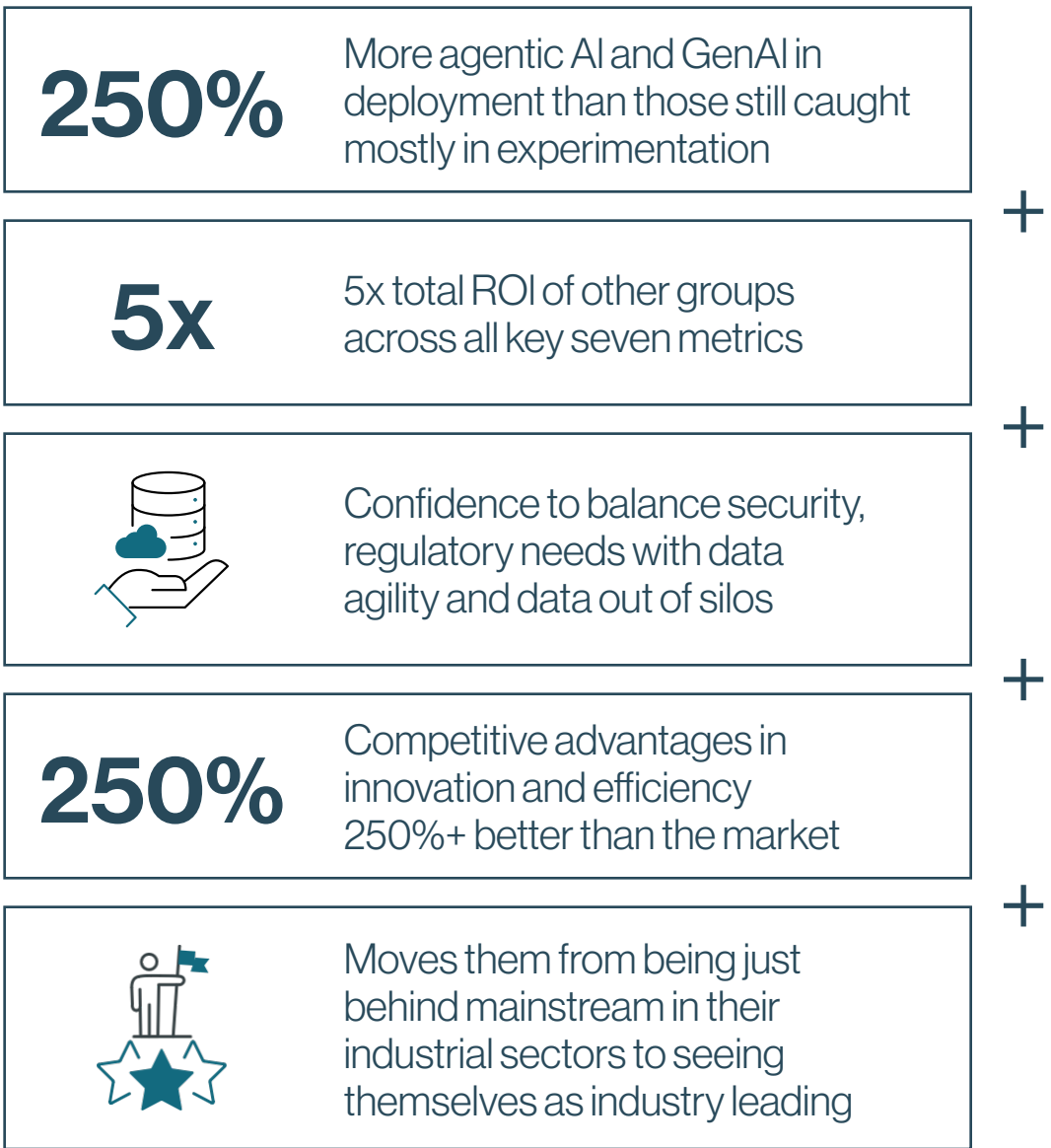
They use **2x more** agentic AI and GenAI than most others.

They are **50% more** mainstream in similar areas of agentic AI and GenAI than their competitors.

They have solved for the tension among the three goals of compliance, getting data out of silos, and getting scale — all at once.

They get five major advantages

For every dollar they invest, they get positive outcomes in multiple areas:



Are you one of the 58 making the commitment each day?

Are you making the right decisions to be an agentic and AI leader?

Are you focusing on the right data infrastructure foundations?

Are you focusing on the right ROI components?

Do you have an experimental or a mainstream mindset?

Have you blueprinted how to become one of those who are thriving?



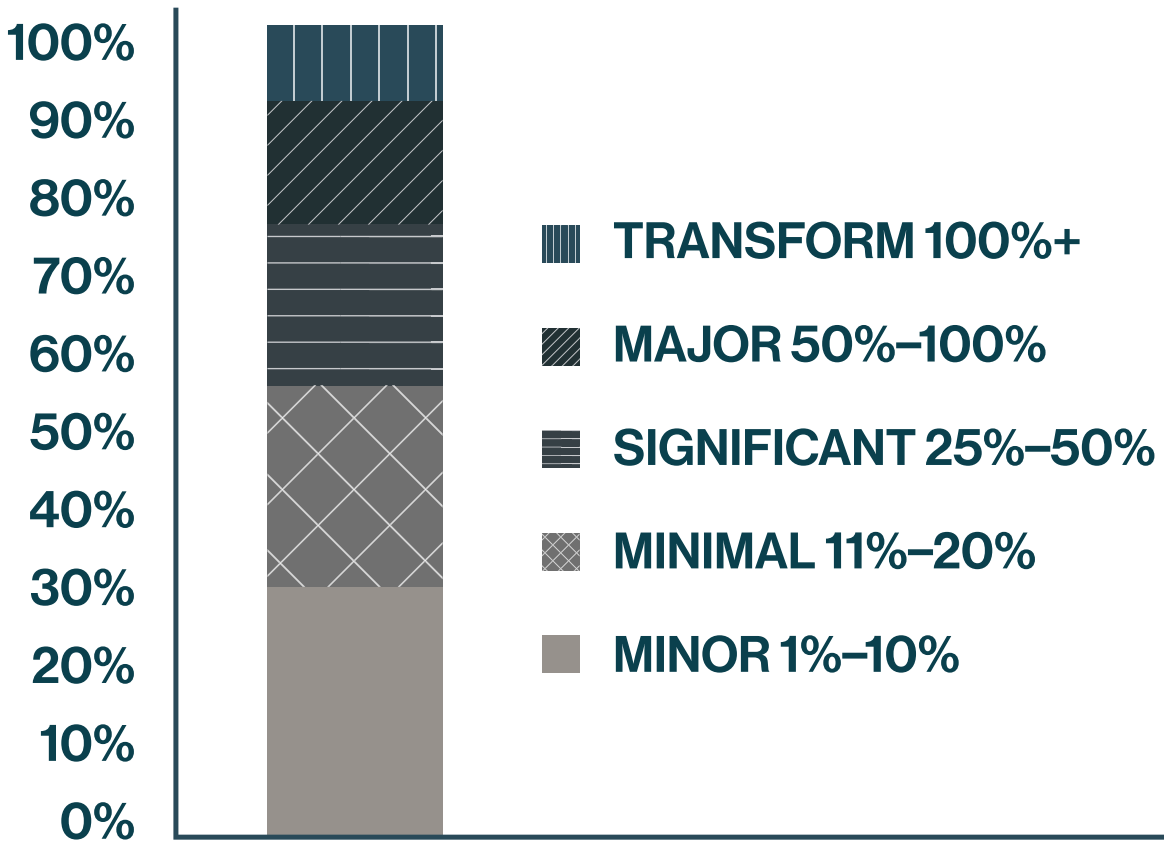
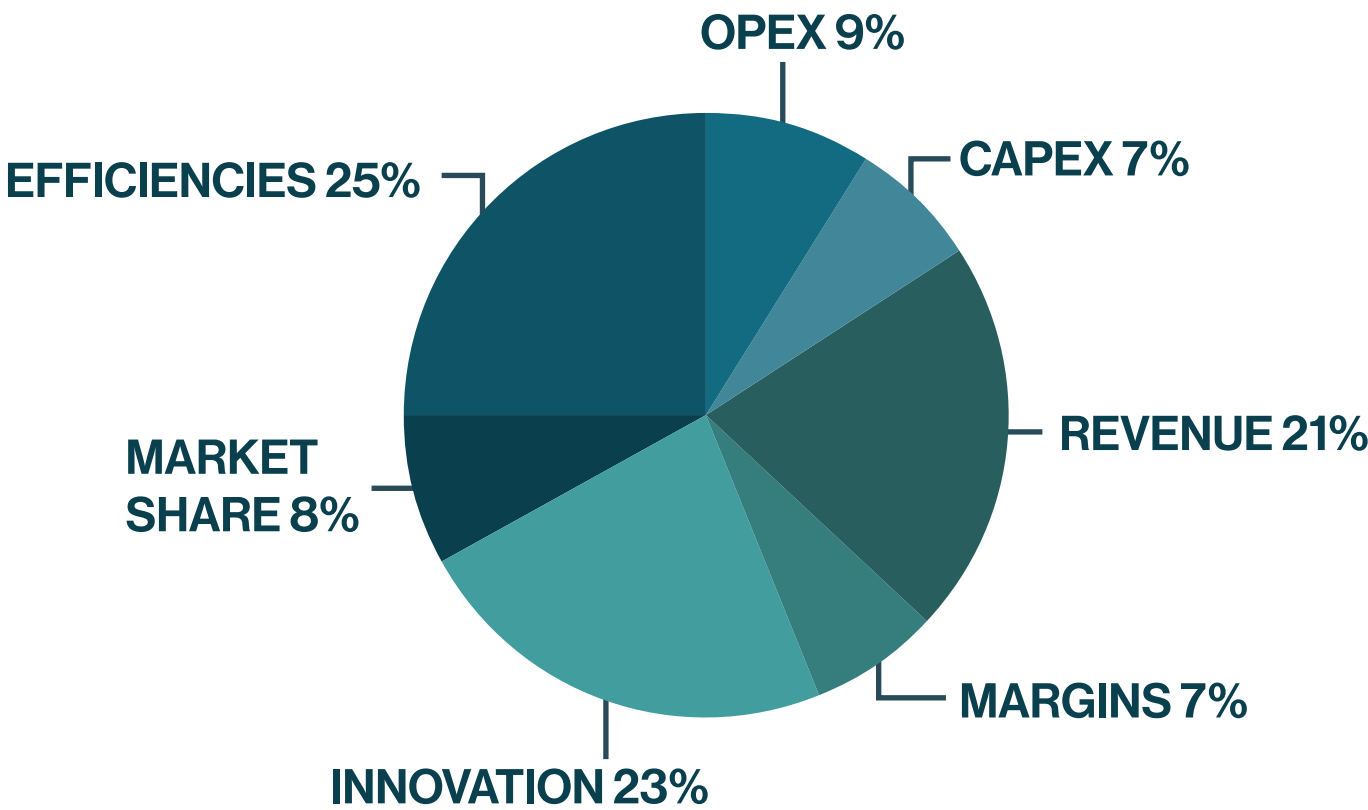
Designing for the right ROI mix

14% is the average level of ROI delivered for each agentic AI and GenAI area. Getting the right mix is key to building a sovereign AI and data infrastructure that enables rapid and extensive exploitation of the value of agentic AI and GenAI with your data across the organization. Note these three points:

- **Innovation and efficiency are key areas for ROI** (together comprising 48% of the total), so you need a single learning platform where all the data and AI is secure, observable, and can be developed in a secure framework. No-code/low-code capabilities are key enabling mechanisms too.
- **Get scale, learn fast**, and expand deployments for success.
- **Assume contribution to total ROI is like a flywheel.** The more AI you do across the enterprise, the more efficiencies and innovation you will drive. Note that those with a mission-critical focus on their own AI and data sovereignty are more optimistic because of this ability than the remaining 87%.

Business Objectives Mix of the Deeply Committed

1%	AI-driven cybersecurity & threat detection
4%	AI-powered automation in IT & DevOps
5%	AI-powered legal & compliance automation
14%	More competitive advantages & innovation
10%	Enhance customer experience
9%	Faster time-to-market response
8%	Improvements in personalization
4%	In regulatory compliance & governance
5%	In revenue growth & profit maximization
4%	In risk management & fraud detection
14%	In scalability & business growth
5%	In smarter supply chain & logistics
9%	In talent & workforce augmentation
13%	Overall productivity & efficiency
9%	Data-driven decision making
9%	Cost and maximize operational savings
3%	Sustainable & green AI initiatives



Becoming an AI factory, at scale



Those driving 5x ROI, the Deeply Committed, deliver a vastly wider range (2x more) of agentic AI and GenAI intelligent applications in mainstream production, because they are more confident in the sovereignty of their AI and data (the knowledge that it is secure and accessible anywhere, in any way) than the other 87%. We could call this the agentic AI and GenAI flywheel—a factory where data and AI sovereignty generates more and more capacity, capabilities, and confidence, and therefore the most results.

The right vision and the right foundations generate a factory at scale.

AGENTIC AI IN	
DEEPLY COMMITTED	
PERSONALIZED CUSTOMER ENGAGEMENT (CHATBOTS)	98%
PREDICTIVE ANALYTICS & BUSINESS INTELLIGENCE	97%
SALES & REVENUE OPTIMIZATION	97%
CYBERSECURITY & FRAUD DETECTION	96%
FINANCIAL & EXPENSE AUTOMATION	89%
WORKPLACE COLLABORATION & PRODUCTIVITY ENHANCEMENT	77%
CONTENT GENERATION & MARKETING AUTOMATION	77%
SUPPLY CHAIN OPTIMIZATION	69%
HR & TALENT ACQUISITION	63%
AUTOMATED IT OPERATIONS & DEVOPS	52%
CODE GENERATION & SOFTWARE DEVELOPMENT	39%
PRODUCT DESIGN & PROTOTYPING	37%
DIGITAL TWIN & SMART SIMULATION	33%
CORPORATE TRAINING & EMPLOYEE DEVELOPMENT	32%
LEGAL DOCUMENT ANALYSIS & CONTRACT MANAGEMENT	31%

Six components for true data and AI sovereignty

Sovereign infrastructure

Gain hybrid control in a private platform, with the automation and agility of cloud services and the flexibility to deploy anywhere.

AI-ready data migration

Securely sync existing data to create a private knowledge base, quickly modernizing your legacy applications into AI-driven experiences.

Private, secure LLM integration

Build AI apps with models of your choice, using low-code/no-code tools, without exposing proprietary data to the cloud.

Access controls and encryption

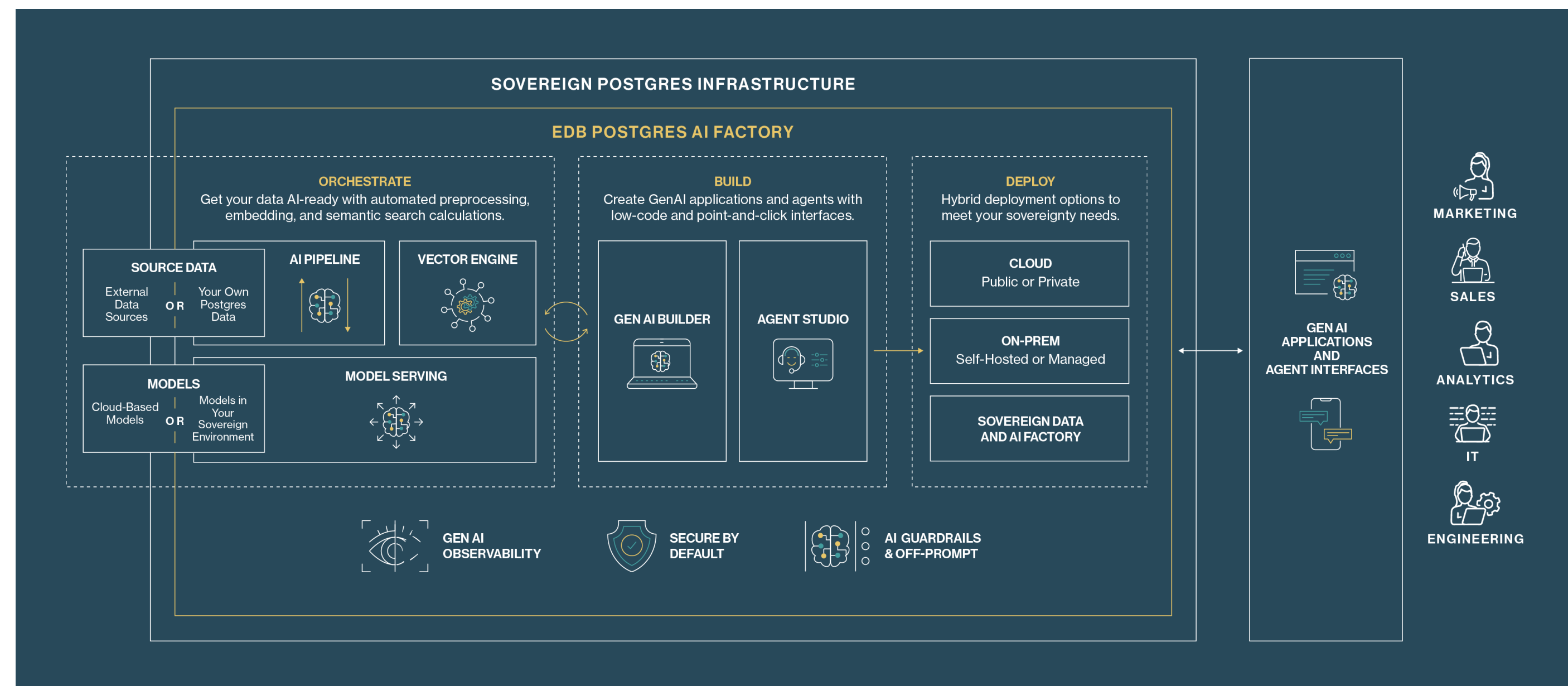
Protect business data fueling your AI applications, with granular role-based access controls and end-to-end encryption.

Comprehensive data and AI observability

Get single-pane-of-glass monitoring across your data estate, combined with observability over your AI data flows.

Always-on assurances

Optimize for performance and availability with AI-driven recommendations and simple distributed active/active configurations for up to 99.999% HA.



Your next steps—1

Assess your segment

In less than two minutes, you can use our self-assessment tool (based on 2,050 interviews and 15,000 simulations) to see where you are in this agentic AI and GenAI revolution.

- Do you have everything you need to succeed?
- Are you misaligned on data infrastructure?
- Are your expectations of ROI too high or too low?
- Are you focused on the right agentic AI and GenAI areas for success?
- Are you missing just one thing to be more successful?

[Try our self-assessment tool »](#)

[Download the full report »](#)



Your next steps—2



See our sovereign AI factory at work

To get agentic AI and GenAI at scale requires a secure, agile, no-code/low-code capability. Watch a demo of EDB Postgres AI to see how more and more frontline teams can apply agentic AI and GenAI to their business needs:

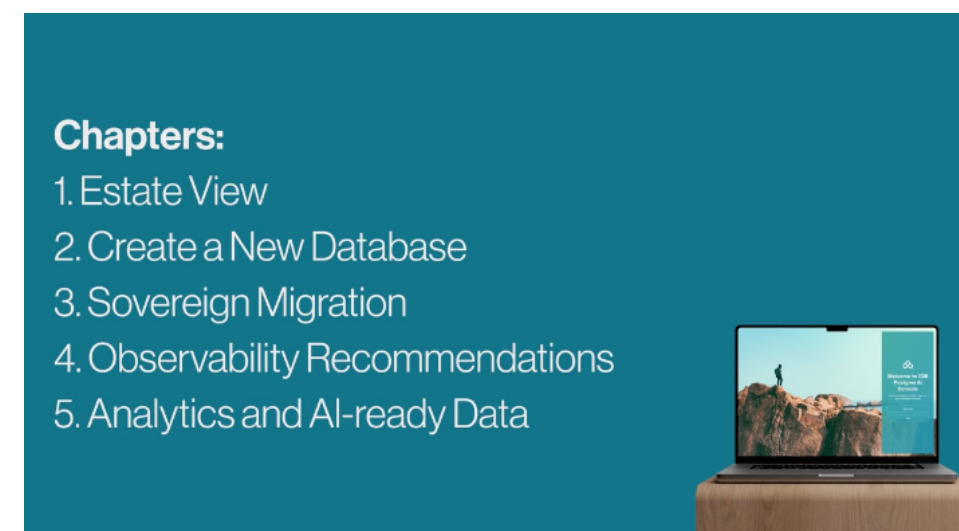
- See how a secure, no-code/low-code AI factory gives you that foundation for success.
- Watch how, with less than 67% of the time and resources (McKnight), you can spin up your own secure, open source AI factory at scale.
- Experience a unique UX designed to deliver speed to insight and value, so you can learn and adjust rapidly.
- All built on Postgres, the most popular and fastest-growing data management platform on the planet.

[Watch the demos now »](#)



EDB Postgres AI Factory

The power of EDB Postgres AI in five simple steps.



EDB Postgres AI Hybrid Management

EDB Postgres AI unlocks hybrid control and unified observability in a sovereign container.



Improve Analytics Insight Without Sacrificing Performance

Learn how to add an analytics node, sync data, and integrate with Databricks.

Key assets for you



Sovereignty conversations in the market

THE TIMES
THE SUNDAY TIMES

The **INDEPENDENT**

FASTCOMPANY

NYSE

VentureBeat

BIGDATAWIRE
DATA SCIENCE • AI • ADVANCED ANALYTICS
FORMERLY DATANAM



[From Compliance to Control:
Mastering AI and Data Sovereignty](#)

[Cutting the Gordian Knot: AI, Data, and
the Future of Financial Services](#)

[The Great Data Repatriation:
Enterprises Are Taking Back Control](#)

[Kevin Dallas, CEO at EDB
Joins NYSE TV Live](#)

[The Synthetic Data Dilemma: Why AI
Success Depends on Data Sovereignty](#)

[Four Steps for Turning Data Clutter into Competitive
Power: Your Sovereign AI and Data Blueprint](#)

[EnterpriseDB Targets
AI Development with Latest Update](#)

[The One Decision That Sets
Agentic AI Leaders Apart](#)



Sovereignty basics

[www.enterprisedb.com/
what-is-sovereign-ai-data-sovereignty](http://www.enterprisedb.com/what-is-sovereign-ai-data-sovereignty)



Sovereignty news site

www.enterprisedb.com/news



EDB Postgres AI is the first open, enterprise-grade sovereign data and AI platform, with a secure, compliant, and fully scalable environment, on premises and across clouds. Supported by a global partner network, EDB Postgres AI unifies transactional, analytical, and AI workloads, enabling organizations to operationalize their data and LLMs where, when, and how they need it. For more information, visit www.enterprisedb.com

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