DLA PIPER

EUROPEAN TECHNOLOGY SUMMIT 2025

Key takeaways

November 2025

The DLA Piper European Tech Summit 2025 was designed with one clear goal: to provide our clients with meaningful insight into the legal and commercial issues shaping the future of technology.

With over 700 attendees in Amsterdam (November 6) – including industry leaders, regulators, and innovators – the day offered a unique opportunity to explore the practical realities behind the headlines.

Across every panel and breakout session, we focused on what matters most to our clients: how to navigate complexity, manage risk, and unlock opportunity in a fast-moving digital landscape. From AI governance and data sovereignty to quantum computing, sustainability, and cybersecurity, the conversations were grounded in real-world challenges and forward-looking strategies.

The Summit created a platform for open dialogue and practical takeaways – we are grateful to all who contributed their time, insight, and expertise. This document captures the key themes and strategic recommendations discussed throughout the day, and we hope it serves as a valuable reference as you continue to shape your own response to the evolving tech and regulatory environment.

Thank you for being a part of the conversation.

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Opening keynote:
Klaas Knot, Former President, Dutch Central Bank

Klaas Knot opened the Summit with a compelling reflection on the pace and impact of technological change. While innovation has always shaped the way we live and work, he noted that today's digital transformation – driven by AI, data, and connectivity – is unfolding faster than any before it, challenging institutions, regulators, and societies to keep pace.

Klaas emphasized that global stability depends on collective action. Whether addressing data privacy, financial resilience, or digital governance, no single country or authority can act in isolation. Effective cross-border cooperation – especially among data protection bodies – is essential to managing risks that transcend national boundaries. He closed with a powerful reminder that curiosity, pluralism, and intellectual cooperation are the foundations of prosperous societies.

Takeaways:

- Accelerating technology demands coordinated, cross-border governance to maintain stability.
- Data privacy risks require harmonized oversight and stronger communication between regulators.
- Intellectual openness and collaboration are essential to building resilient, prosperous societies.

" Technology is not the first major innovation that has captured our imagination and transformed the way we think and work – but it may well be the fastest-moving one."

KLAAS KNOT
Former President,
Dutch Central Bank

MODERATOR:

JEANNE DAUZIER
Partner,
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SPEAKERS:

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Group Data Protection Officer,
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Senior Partner & UK CEO,
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BENJAMIN LAROCHE
Legal Counsel,
AI Regulation Lead,
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JEREMY ROLLISON
Director of EU
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Panel: AI – real world use cases

This panel brought together senior leaders from Airbus, L'Oréal, Microsoft, and Reply to explore the real-world deployment of AI in business – moving beyond tools and trends to focus on strategy, governance, and impact. The discussion tackled the challenges of scaling AI, the role of governance in enabling innovation, and the challenges of setting up future proof governance with constantly evolving technology (recently on the emerging field of agentic AI: autonomous systems capable of making decisions and taking actions).

The conversation opened with reflections on the MIT Nanda Project's viral report, which claimed that 95% of enterprise GenAI investments were delivering no return. Panelists debated the findings, sharing firsthand experiences of what's working – and what's not – in AI adoption. A key theme emerged: management engagement as a major leverage for scaling AI adoption.

Governance was positioned as a critical enabler. Panelists shared examples of how structured frameworks have driven innovation while managing risk. The panel also examined the complexity of multi-authority governance models emerging across the EU, and their implications for AI Act compliance. Looking ahead, the rise of agentic AI prompted discussion on how governance must evolve. While few organizations are deploying agentic systems at scale, interest is growing – and with it, questions about regulation, accountability, and adaptability.

Takeaways:

• Treat governance and management engagement as strategic enablers for AI deployment and innovation, not just a compliance requirement.

• Prepare for agentic AI by ensuring governance frameworks can adapt to emerging capabilities.

PETRA FLORIZOONE
Global Quantum
Business Director,
IBM

Flash talk:
Unlocking the quantum mindset

Petra Florizoone, IBM Quantum Global Business Director, delivered a compelling flash talk on the rise of quantum computing and its potential to reshape industries, economies, and scientific discovery. Framing quantum as the second great revolution – following the first which gave us lasers, MRIs, and transistors – Petra highlighted how quantum systems unlock new capabilities by operating in fundamentally different ways from classical computers.

She outlined IBM's mission to bring useful quantum computing to the world, emphasizing two key pillars: scalable quantum platforms and a global ecosystem of enterprises and researchers driving algorithm innovation. With milestones already underway – including quantum utility in 2023 and fault-tolerant systems projected by 2029 – the future is closer than many think.

The session explored real-world applications, from designing better batteries and materials to discovering new antibiotics and optimizing logistics. Petra also emphasized the integration of quantum with AI and classical HPC, forming a hybrid infrastructure to tackle society's most complex challenges.

The economic opportunity is vast: early adopters are expected to capture 90% of quantum's value, with projections of USD1 trillion in impact by 2035.

Takeaways:

- Embrace quantum as a complement to classical and AI computing – each suited to different problem types.

- Engage early to unlock competitive advantage as quantum utility becomes reality.

- Track developments in quantum hardware, algorithm discovery, and enterprise adoption to stay ahead of the curve.

MODERATOR:

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Panel: Data sovereignty – Tech in a multi polar world

As global power dynamics shift and digital borders harden, data sovereignty has emerged as a defining issue at the intersection of technology, geopolitics, and national security. This panel explored what data sovereignty means, why it has become a strategic priority in boardrooms, and how it plays out in practice when data is stored, accessed, and governed.

Speakers shared how data sovereignty impacts their organizations and influences decisions around ICT services. They examined whether the growing emphasis on sovereignty is primarily driven by regulatory and compliance pressures, or whether deeper strategic and ideological motivations are at play.

The discussion also addressed the tension between customer expectations and vendor capabilities, particularly in regulated sectors. EU-based clients increasingly demand control, transparency, and portability, raising the question of how suppliers can meet these standards without compromising innovation.

Another key theme was the role of regulation in shaping the future of data governance. Should the EU pursue more regulation to drive standardization and vendor accountability, or less regulation to remain globally competitive? The consensus: there is no one-size-fits-all solution. Businesses must navigate a complex landscape where legal, technical, and strategic considerations intersect, and where tech professionals play a critical role in balancing resilience, compliance, and innovation.

Takeaways:

- Vendors must increasingly align with evolving client demands to address rising data sovereignty requirements.

- Businesses should assess data portability and governance as strategic differentiators, not just compliance requirements.

- Regulatory clarity and cross-border cooperation are essential to managing risk in a fragmented digital landscape.

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Partner,
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SPEAKERS:

DR EVA DE MOL
Founder, Investor, Scientist

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OANA OLARIU
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Breakout session: Investing in innovation – the role of private equity and venture capital in tech

As European tech companies scale and mature, the role of private equity and venture capital is evolving – bringing not only capital, but also strategic insight and operational complexity. This session explored how investors are unlocking value, navigating regulatory and geopolitical risks, and finding those true investment opportunities in an increasingly dynamic landscape.

Panelists shared how due diligence remains foundational but is increasingly enhanced by AI tools that help assess market potential, founder credibility, and operational resilience. The conversation highlighted the importance of identifying scalable, impactful businesses, the investor's role in shaping their growth trajectory as well as actual adaptability of the tech itself.

The session also examined how funds-of-funds approach investment criteria, particularly with being one step removed from the actual investment decisions. Strategic use of technology, sector specialization, and alignment with long-term value creation were cited as key differentiators in today's competitive environment.

Finally, the discussion turned to the tech verticals that are currently attracting the most attention – including AI, cybersecurity, and cloud infrastructure – and how investors are balancing innovation with governance and risk management to drive sustainable growth.

Takeaways:

- Use AI-enhanced tools to improve due diligence and identify high-potential investments.

- Prioritize founder vision, scalability, and sector alignment when evaluating early-stage opportunities.

- Leverage technology and specialization to differentiate investment strategy in a competitive market.

MODERATOR:

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Partner,
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Breakout session: Trends in technology litigation in a world of AI and data driven technology

This session explored the evolving litigation landscape surrounding artificial intelligence and data-centric technologies, with a particular focus on developments across the US, UK, and Europe.

The discussion began with updates on emerging disputes in AI-related patent litigation and the EU's efforts to simplify regulation through initiatives such as the Digital Omnibus and the AI Act.

Speakers addressed the UK position on copyright law, particularly following the judgment in Getty v Stability AI handed down November 4, 2025, and discussed the UK Government's consultation issued earlier in the year. From a US perspective, speakers highlighted the large number of cases pending, which primarily concern copyright infringement claims related to training AI models and their outputs. This included the June 2025 summary judgment decisions finding certain AI training on books to be fair use. Speakers also summarized the US Copyright Office's three reports focusing on (i) digital replicas, (ii) copyright ability of AI outputs, and (iii) liability and licensing considerations in AI model training.

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Speakers further contributed in-house perspectives on navigating the shifting terrain, especially in highly regulated, data-intensive sectors. For global suppliers, the challenge lies in delivering AI-enabled services that meet the legal requirements of multiple jurisdictions – from the EU to the US and beyond. The need for harmonization, clarity, and practical guidance was a recurring theme, as companies seek to avoid litigation while continuing to innovate.

The discussion also addressed the importance of standardization and simplification in AI and data regulation. While regulation is essential to safeguard rights and ensure accountability, overly complex or fragmented frameworks risk stifling business and slowing adoption. The session closed with reflections on the next 12 months, offering cautious optimism that regulatory clarity and industry collaboration could improve the landscape – but warning that uncertainty remains, particularly in jurisdictions where there is no specific legislation dealing with AI issues such as training and the ownership of outputs.

Takeaways:

- Monitor developments in AI-related intellectual property litigation and regulatory enforcement across key jurisdictions.

- Build legal frameworks that support global compliance without compromising innovation.

- EU regulatory simplification efforts may help accelerate responsible AI adoption.

MODERATOR:

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Breakout session: Powering AI – meeting demand sustainably

As investment in AI continues to accelerate, the energy demands of data centres have become a central concern for technology companies, regulators, and infrastructure providers alike. This session explored how organizations can meet those demands responsibly – balancing innovation with sustainability in an increasingly resource-intensive landscape.

Panelists discussed the challenges of scaling AI infrastructure while maintaining environmental commitments. With compute power driving everything from model training to real-time inference, the pressure on energy grids is mounting. The conversation focused on how renewable energy procurement, smarter grid integration, and long-term planning can help mitigate the environmental impact of AI build-out.

The session also highlighted the strategic opportunities for tech companies to lead in green innovation. From power purchase agreements to regional energy partnerships, businesses are rethinking how they source and manage energy to align with ESG goals. The message was clear: sustainability is no longer a side consideration – it's a competitive imperative.

Takeaways:

- Integrate renewable energy procurement into AI infrastructure planning from the outset.

- Collaborate with energy providers to develop scalable, low-carbon solutions for data centre operations.

- Treat sustainability as a strategic differentiator in AI deployment and corporate positioning.

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Breakout session:
Cloud transformation
to unlock value

As organizations across Europe accelerate their digital journeys, cloud transformation has become a cornerstone of innovation, agility, and competitive advantage. This session explored how leading enterprises are leveraging cloud technologies not just to modernize IT infrastructure, but to unlock new sources of business value – from operational efficiency and cost optimization to data-driven decision-making and enhanced customer experiences.

Panelists emphasized the evolving role of legal teams in this transformation. Traditionally seen as gatekeepers, legal departments are now being embedded into the innovation lifecycle – ensuring that compliance and governance are integrated from the outset, not retrofitted at the end. The rise of generative AI within cloud environments has amplified this shift, with organizations recognizing the need to balance creative ambition with legal feasibility. As one speaker noted, "We should not be forced to choose between compliance and innovation – both must already be integrated into the process."

The discussion also addressed the complexity of managing hyperscaler relationships, structuring cloud investments, and navigating fragmented partner ecosystems. Legal leaders shared strategies for mitigating risk, negotiating robust contracts, and fostering collaboration across IT, legal, and business teams. Looking ahead, the panel called for clearer regulatory frameworks and more agile governance models to support continued innovation in cloud-enabled AI and digital infrastructure.

Takeaways:

- Embed legal teams into cloud transformation initiatives to align innovation with compliance from the start.

- Prioritize governance mechanisms that support accountability across hyperscalers and partner ecosystems.

- Invest in legal talent and cross-functional collaboration to manage risk and unlock strategic value in cloud-driven projects.

Breakout session: Next-Gen Chips – running the future

This panel explored the evolving silicon landscape and the central role of semiconductors in powering innovation across AI, IoT, autonomous vehicles, and quantum computing. Speakers from ASML, NVIDIA, and the legal sector unpacked the technical, geopolitical, and regulatory forces shaping the future of chips.

The conversation began with the potential limits of Moore's Law and the rise of domain-specific architectures, as companies move away from legacy models toward custom silicon. Innovations such as 3D stacking, system-on-chip design, and new materials are redefining what chips can do – while edge AI and quantum computing signal a revolution in how compute power is deployed.

Global demand and supply chain fragility were key concerns. With GPUs now considered the "oil" of AI, access to chips has become a strategic issue. The panel highlighted the small number of global producers and the growing tension between innovation, regulation, and industrial policy.

Legal perspectives focused on shifting patent landscapes, enforcement strategies, and the rise of collaborative IP defence models. Meanwhile, NVIDIA emphasized the growing importance of software optimization in driving performance – potentially surpassing raw silicon capability.

The panel closed with reflections on AI's role in chip design and manufacturing, and a forward-looking debate on what will define the next chapter of the semiconductor race: scale, IP control, software, or policy.

Takeaways:

- Track the shift toward domain-specific architectures and energy-efficient chip design.

- Recognize the strategic importance of chip access, production capacity, regulation, and supply chain resilience.

- Explore how software and AI are reshaping hardware innovation and manufacturing productivity.

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Breakout session:
The sustainability agenda –
balancing growth and governance

This session explored the evolving role of corporate boards in embedding sustainability into core business strategy. Drawing on insights from DLA Piper's The Future of Boards project, developed in collaboration with the Cambridge Institute for Sustainability Leadership, the panel examined how governance structures are adapting to meet rising ESG expectations while maintaining commercial agility and investor confidence.

Speakers discussed the practical challenges boards face in aligning growth targets with sustainability principles. From climate risk and supply chain transparency to social impact and regulatory compliance, the conversation highlighted the need for boards to move beyond reporting and into strategic integration. Robust governance frameworks – including clear accountability mechanisms and cross-functional oversight – were seen as essential to driving meaningful change.

The panel also addressed the tension between investor demands and operational realities. As ESG metrics become more central to capital access and business legitimacy, boards must navigate emerging challenges such as evolving disclosure standards, stakeholder activism, and the shifting regulatory landscape. The message was clear: sustainability is no longer a peripheral issue – it is a board-level imperative.

Takeaways:

- Integrate sustainability into board-level strategy to align growth with long-term resilience.

- Establish governance structures that ensure transparency, accountability, and cross-functional ownership.

- Monitor emerging ESG challenges and regulatory shifts to stay ahead of investor and stakeholder expectations.

Keynote: Dr. Eva De Mol

Dr. Eva de Mol delivered an inspiring keynote on Europe's evolving tech landscape, highlighting how the region is entering a new era of innovation and entrepreneurship. Over the past decade, Europe has built one of its strongest cohorts of venture-backed startups, contributing around 17% of global new enterprise value – a remarkable leap from its late start. This momentum signals that Europe is no longer just catching up but actively shaping the future of technology.

She outlined the key ingredients for a thriving innovation ecosystem: capital, talent, regulatory stability, and diversity. While there is room for improvement, these areas present exciting opportunities for growth. Increasing domestic investment and creating incentives for early-stage investors can unlock significant potential, while Europe's cultural shift toward embracing entrepreneurship and risk-taking is already underway.

Talent and diversity were central to her vision. Europe is calling for more international talent and better digital education to fuel innovation. Encouragingly, there is growing awareness of gender diversity, and initiatives to support female founders and investors are gaining traction. These efforts will help create a richer, more inclusive tech ecosystem that reflects the diversity of society.

Finally, Dr. de Mol emphasized Europe's unique position to lead responsibly in emerging technologies like AI. By prioritizing ethical frameworks and addressing algorithmic bias early, Europe can set global standards for fairness and transparency. With collaboration, bold thinking, and a willingness to innovate, Europe is poised to become a powerhouse in the next wave of tech transformation.

Takeaways:

- Europe Rising: The region is building a strong foundation for innovation, with startups contributing significantly to global enterprise value.

- Opportunities Ahead: Unlocking capital, attracting talent, and fostering diversity will accelerate Europe's leadership in tech.

- Responsible Innovation: Europe can lead globally by combining technological progress with ethical standards and inclusive practices.

Flash talk:
New frontiers in tech regulation

This energizing flash talk explored how the EU's Digital Decade is reshaping the boundaries of tech regulation, offering a candid look at the policy shifts impacting AI, data governance, and digital infrastructure. The talk challenged the notion of a one-size-fits-all solution, instead advocating for a holistic approach that balances innovation, security, and fairness across jurisdictions.

The conversation acknowledged the tension between regulatory ambition and geopolitical reality. While Europe aspires to build a beautiful digital economy, external pressures – from global competition to fragmented standards – continue to complicate progress. Businesses must now navigate a landscape where compliance is not just a legal obligation, but a strategic imperative.

Attendees were encouraged to stay ahead by aligning with Europe's evolving digital vision. That means engaging with regulators, anticipating policy developments, and embedding governance into product and service design. The message was clear: those who treat regulation as a catalyst for innovation, rather than a constraint, will be best positioned to lead.

Takeaways:

- Monitor EU policy developments and align digital strategy with the goals of the Digital Decade.

- Treat regulation as a strategic enabler – embed governance into innovation from the outset.

- Engage proactively with regulators to shape workable, forward-looking compliance frameworks.

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VICTORIA OTTER
AI Lead for Cybersecurity,
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Panel: Securing the future – cybersecurity strategies for the digital age

This session offered a strategic look at the evolving cybersecurity landscape. As digital transformation accelerates, the nature of cyber threats has shifted dramatically – from brute-force breaches to credential-based intrusions. The panel underscored how cybercrime has become increasingly accessible, evolving into an industrialized marketplace.

Cyber threats around the world are increasingly driven by geopolitical tensions; mirroring global political and economic realities as attackers cross borders to pursue intellectual property and innovation. The panel emphasized how the targeting of certain sectors, such as manufacturing, reflects their strategic value.

The panel called for a mindset shift: from security-based thinking to resilience-based strategy. With attackers able to move laterally across systems in under a minute, it has become more important than ever that incident response and recovery must be fast, coordinated, and built into infrastructure design. Collaboration with regulators, integrating privacy and legal frameworks, and the responsible use of AI and machine learning in cybersecurity were all cited as essential to staying ahead of threats in a borderless digital world. The panel emphasized how in this context, the role of legal teams is being redefined – moving from reactive gatekeepers to embedded partners in building digital integrity from the start.

Takeaways:

- Shift from reactive security to proactive resilience by embedding legal, privacy, and security from the outset.

- Monitor geopolitical dynamics and sector-specific risks to anticipate targeted cyber threats.

- The response matters: collaborate with regulators and leverage AI responsibly to strengthen incident response and recovery capabilities.

Closing Keynote: Dr Gemma Galdón-Clavell, CEO and Founder, Ethicas AI

Dr. Gemma Galdón-Clavell delivered a keynote looking ahead to the future of artificial intelligence. She stressed that while AI is rapidly transforming industries, its long-term success depends on embedding ethics, accountability, and governance at every stage. Drawing on her experience as founder of Eticas.ai and advisor to global institutions, she framed the conversation around trust and transparency in AI systems.

She noted that independent audits have already exposed systemic biases and inefficiencies in widely used predictive tools. By highlighting these examples, she showed how audits safeguard against harm, ensuring AI remains explainable, fair, and aligned with societal values. Her focus was not on slowing innovation, but on building mechanisms that let it flourish responsibly.

Dr. Galdón-Clavell also pointed to Europe's leadership in AI regulation. Harmonized rules across jurisdictions, she argued, are critical to balancing innovation with public trust, while fragmented compliance risks undermining adoption. Regulation, in her view, is a competitive advantage, positioning Europe as a trusted hub for responsible AI.

Finally, she explored broader societal implications. From privacy to equality, she cautioned that unchecked AI in sensitive areas like policing, hiring, or healthcare could have profound consequences. She urged businesses and policymakers to adopt frameworks that measure not only financial return but also social and ethical outcomes.

Takeaways:

• Independent AI audits are essential to ensure fairness, transparency, and accountability.

• Europe's regulatory leadership is a competitive advantage, enabling innovation built on trust.

• The future of AI will be defined not just by breakthroughs, but by how societies govern and integrate it responsibly.

ALGORITHM TO ADVANTAGE

Make AI clarity your competitive advantage

You may be a developer of cutting-edge AI tools and systems. You may be an investor looking for the right opportunity or to preserve value. Or you may be a tech-enabled corporate rolling out AI internally or in new products and services.

Wherever you are in the AI value chain, Algorithm to Advantage gives you actionable insights you can turn into your competitive edge. Our new hub is your resource for our latest thinking across the full AI lifecycle. We identify the forces shaping AI, analyse the emerging risks and opportunities, and break down solutions.

To access the hub and continue the conversation, scan the QR code opposite or find out more here:

DLA Piper Algorithm to Advantage

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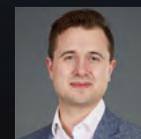
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