Closing plenary session:
From reality shock to action

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NOKIOS
October 23rd 2025

Capgemini

Technology has become a key tool in geopolitics, with nations questioning dependence on foreign tech for critical systems

Source: Al Jazeera

Source: THOMAS KIENZL/AFP

For the stability of our societies, critical infrastructures need to function at all times
As we move toward a digital state, our vulnerability from technology increases

Maximum Sovereignty / Autarky cannot be the goal or answer

BENEFITS

Governments want to reduce risk as much as possible and secure **compliant digital infrastructure**

COSTS

Sovereignty has a price – in increased **complexity,** sometimes **lower functionality** and higher **cost**

Decision-makers need to strike a balance rather than lean on one side only

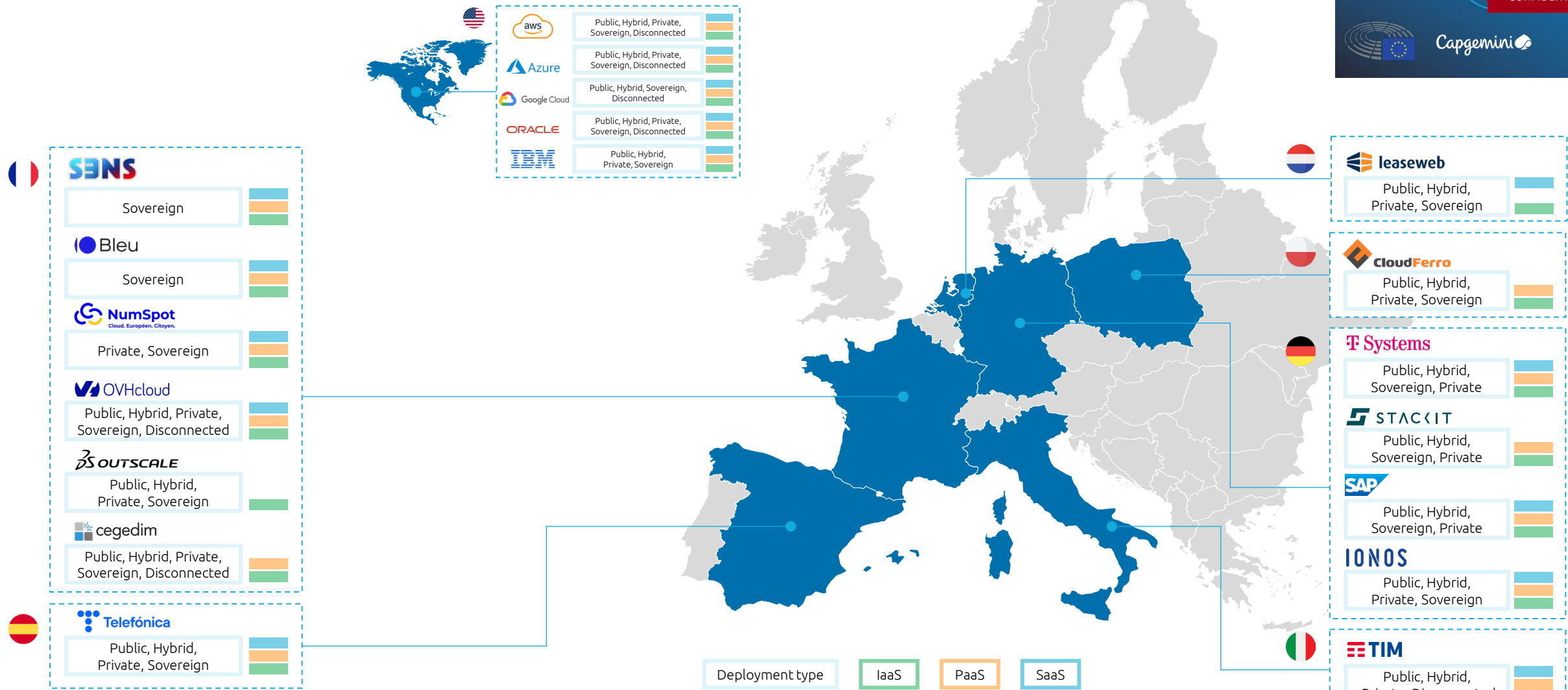# The European Parliament asked us to assess its cloud options

Overview of providers from EU Parliament Study

European Parliament
Sovereign Cloud
Market Analysis
2025
CONFIDENTIAL
Capgemini

🇺🇸
- aws — Public, Hybrid, Private, Sovereign, Disconnected
- Azure — Public, Hybrid, Private, Sovereign, Disconnected
- Google Cloud — Public, Hybrid, Sovereign, Disconnected
- ORACLE — Public, Hybrid, Private, Sovereign, Disconnected
- IBM — Public, Hybrid, Private, Sovereign

🇫🇷
- S3NS — Sovereign
- Bleu — Sovereign
- NumSpot Cloud. Européen. Citoyen. — Private, Sovereign
- OVHcloud — Public, Hybrid, Private, Sovereign, Disconnected
- 3DS OUTSCALE — Public, Hybrid, Private, Sovereign
- cegedim — Public, Hybrid, Private, Sovereign, Disconnected

🇪🇸
- Telefónica — Public, Hybrid, Private, Sovereign

🇳🇱
- leaseweb — Public, Hybrid, Private, Sovereign

🇵🇱
- CloudFerro — Public, Hybrid, Private, Sovereign

🇩🇪
- T Systems — Public, Hybrid, Sovereign, Private
- STACKIT — Public, Hybrid, Sovereign, Private
- SAP — Public, Hybrid, Sovereign, Private
- IONOS — Public, Hybrid, Private, Sovereign

🇮🇹
- TIM — Public, Hybrid, Private, Disconnected

Deployment type | IaaS | PaaS | SaaS

Based on their requirements, we evaluated nearly 20 possible providers

European Parliament
Sovereign Cloud
Market Analysis
2025

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VENDOR

Creation date:

Headquarters:

Capitalistic structure:

Employees:

Applicable laws:
- 🇺🇸 US regulation
- 🇪🇺 European regulation

SERVICE OFFER

Deployment type

| Public | Hybrid | Disconnected | *Focus* Sovereign | Private |

Services Offers

Service level*: Limited ——————●—— Developed

| IaaS | PaaS | SaaS | CaaS |

Services Catalogue

- Compute Services:
- Storage Services:
- Network Services:
- Database Services:
- Security Services:
- Application Services:

- Management and Monitoring:
- Artificial Intelligence and Big Data:
- Developer Tools:
- Collaborative Tools:
- Data Protection & Compliance:
- Advanced Sovereign Control...

Certifications

ISO 27001 27018 9001 27017 27019 ...

C5 BSI C5

ENS High

AICPA SOC 1, 2, 3

Technical Partnership

HashiCorp, NetApp, dynatrace, SAS, mongoDB, Informatica

Server localisation

🇪🇺 Dublin · 3 AZ
🇪🇺 Amsterdam · 3 AZ
🇫🇷 Paris · 3 AZ
🇩🇪 Frankfurt · 3 AZ
🇩🇪 Berlin · 3 AZ
🇨🇭 Zürich · 2 AZ
🇨🇭 Geneva · 2 AZ

SOVEREIGN OFFER ANALYSIS

Overall Maturity

1 - Data 88%
2 - Operation 89%
3 - Technology 100%

Data Maturity

Operation Maturity

Technological Maturity

*Service level is based on questionnaire results

Norway seems to not have prioritized digital sovereignty so far

Digital Sovereignty Index

The Digital Sovereignty Index measures how 57 countries compare in terms of digital independence

Norway ranked 31st with a DSI score of 6.35

Germany ranked 2nd with a DSI score of 53.85

0   100

EU average of 16.3

Digital Sovereignty Index: How Countries Compare in Digital Independence, July 2025
Facilitated by NextCloud

In the end, Europe needs to avoid becoming a digital colony and become a global player in tech

Short-term moves

- Support **European companies**

- Motivate **hyperscalers** to **adapt** to and **invest** in Europe

Long-term moves

- Global leadership in next gen technologies like **quantum** and **AI**

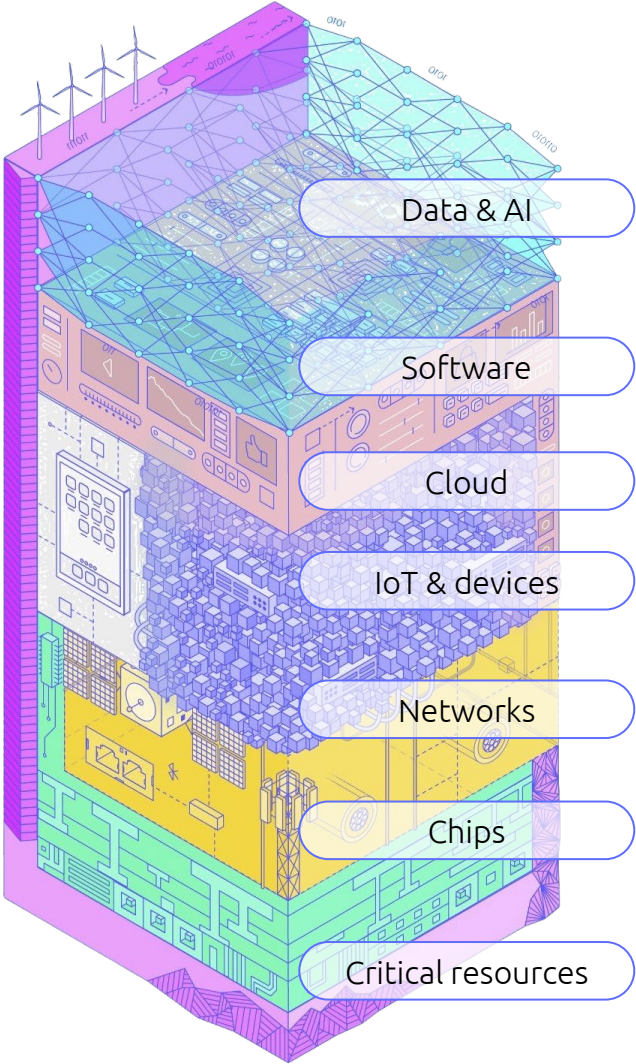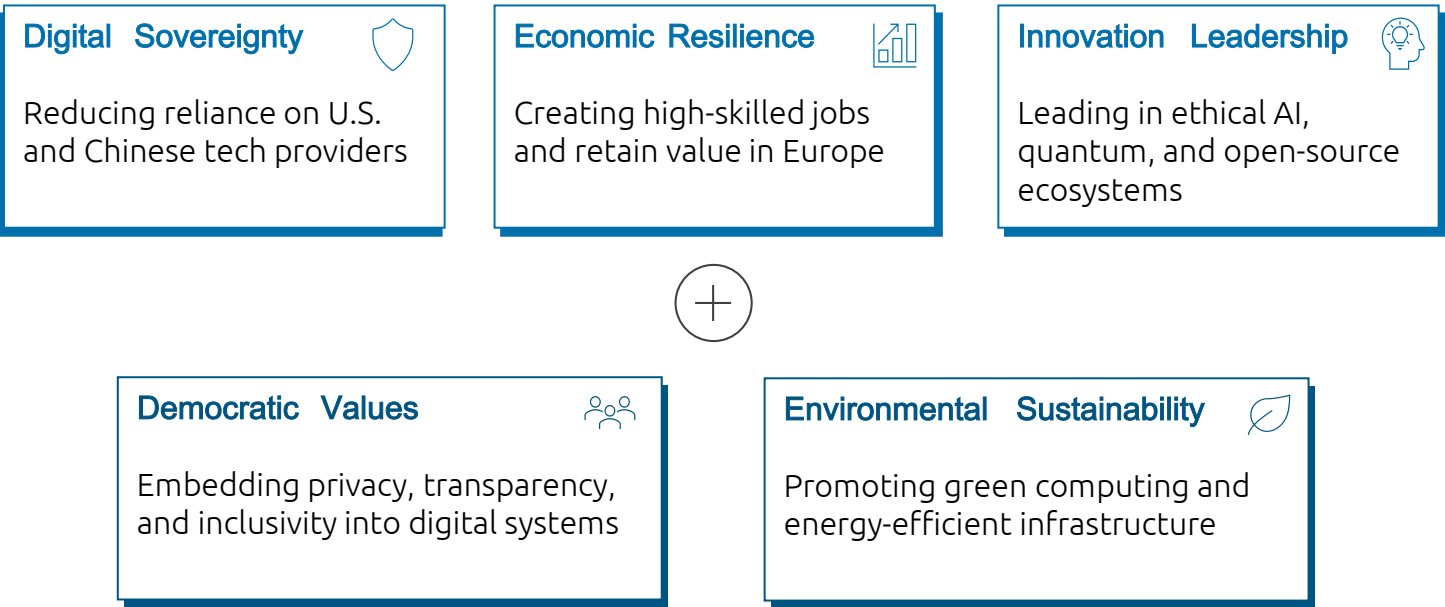- Build **sector -specific models** and specialized, **local hyperscalers**

To address these challenges, a strong European collaboration is needed

EuroStack as vision of a sovereign European digital infrastructure

Strategic goals

Digital Sovereignty

Reducing reliance on U.S. and Chinese tech providers

Economic Resilience

Creating high-skilled jobs and retain value in Europe

Innovation Leadership

Leading in ethical AI, quantum, and open-source ecosystems

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Democratic Values

Embedding privacy, transparency, and inclusivity into digital systems

Environmental Sustainability

Promoting green computing and energy-efficient infrastructure

The scope may be ambitious, but we need to address all layers and plan for plausible scenarios — not just the likely ones

- Data & AI
- Software
- Cloud
- IoT & devices
- Networks
- Chips
- Critical resources