

DIGITAL FREEDOM STARTS WITH  
SOVEREIGNTY

WEBINAR-JUNE 12, 2025

 T Systems

**STAY IN  
CONTROL.  
BECOME  
SOVEREIGN.**



# Your Team Today



**Klaus Koefoed**  
**Managing Director**

**Leading the Northern Europe region  
– UK&I and the Nordics**

- +20 years of experience from the IT & Consulting industry
- Vast experience working with Cloud Transformation programs
- Industry expertise from Financial Services

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**Marketing Director**

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# Today's Agenda

1. Who are we?
2. Geopolitical situation
3. Market experience
4. What is sovereignty?
5. Solutions matching sovereignty
6. Open Telekom Cloud
7. Customer cases
8. Sovereign AI
9. How to get started
10. Recommendations
11. Q&A

**T-Systems** is an integral part of **Deutsche Telekom** and we leverage this strong ecosystem of skills, relations, and financial power for **your benefit.**

## About **Deutsche Telekom**

**1** of the **strongest brands** in the world

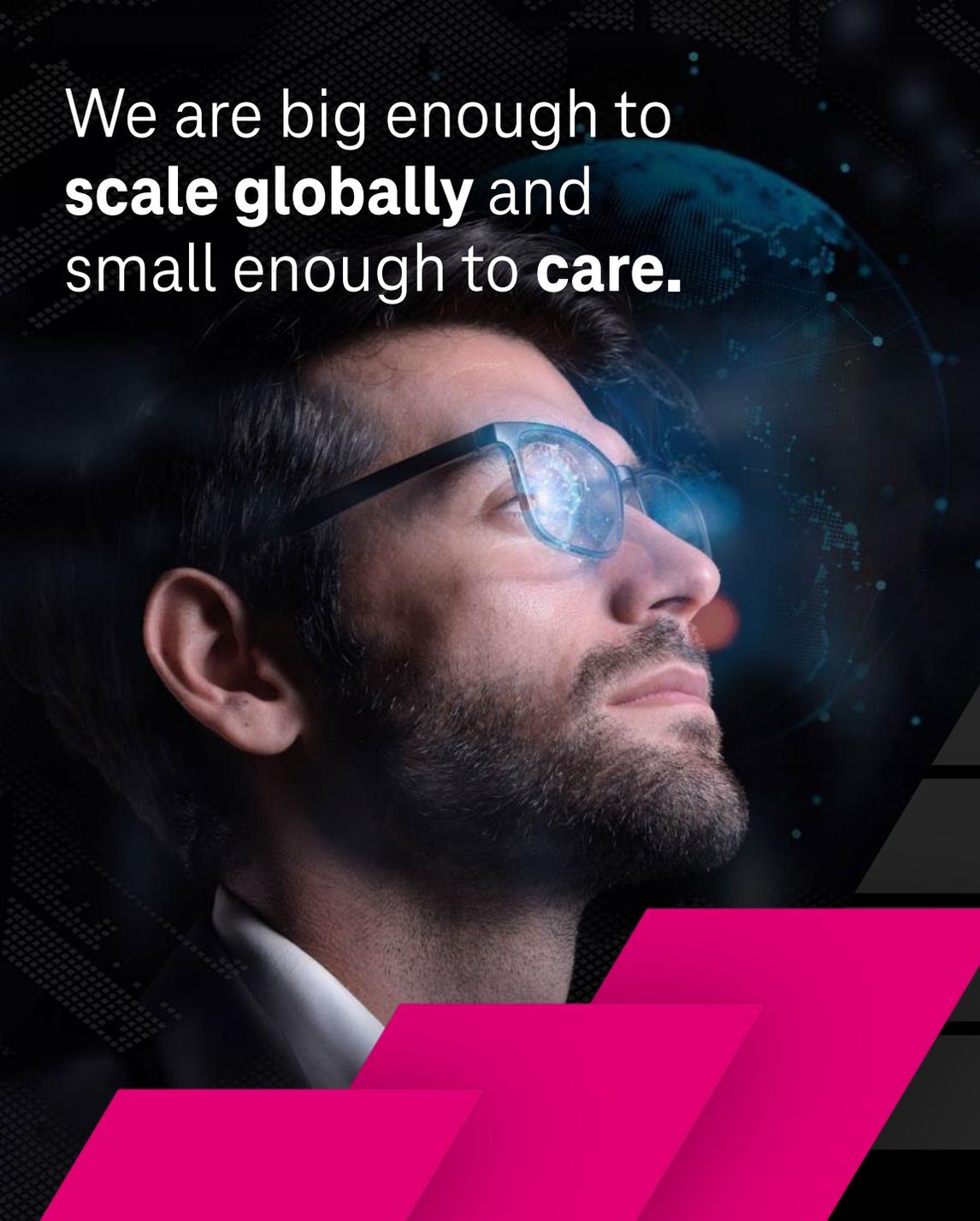
**+ 50** countries

**€115 B** revenue in 2024

**318 M** customers

**+ 1,000** global leading **partners**

**198,194** employees worldwide



We are big enough to **scale globally** and small enough to **care.**

## About T-Systems

**#1** IT service provider  
in Germany & DACH

**€4.0 B** Revenue up **2.8%** year on year and **+10.8%**  
organic growth in OE from 2023 to 2024

**8** Security Operations Centers (SOCs) globally  
defending against **+ 36 M attacks per day**

**26** Countries across Europe, Asia,  
and LATAM as well as the US

**+ 500** Leading technology  
partners and suppliers

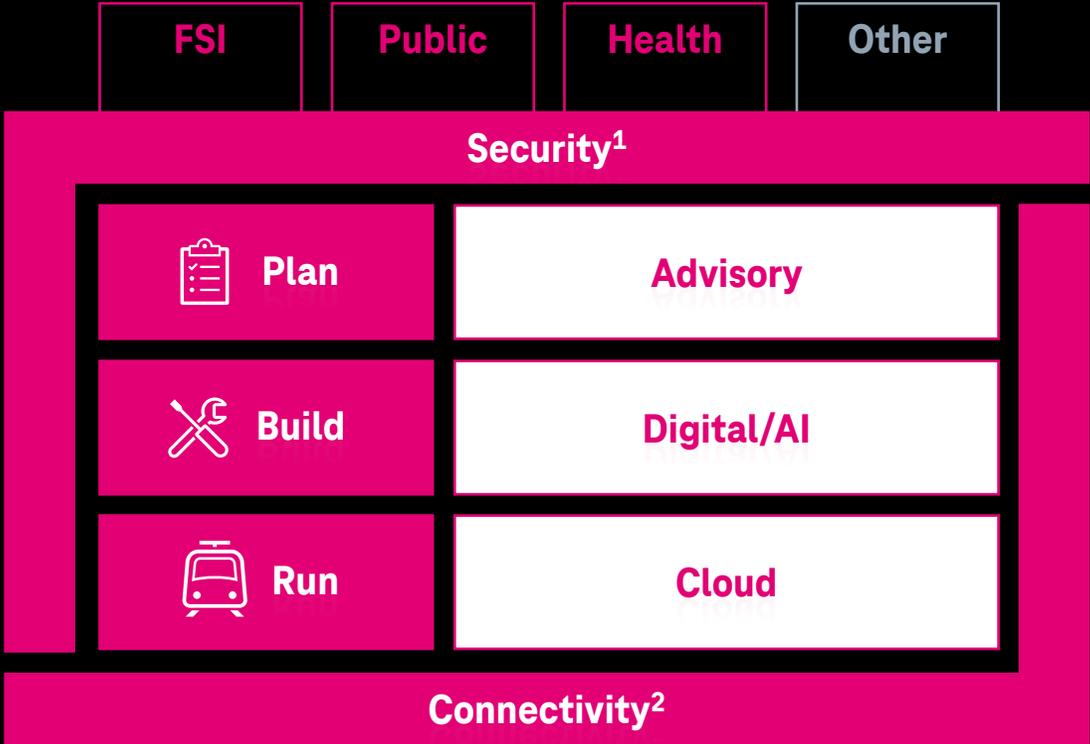
**+ 1,000** Customer references  
as proof points

**+ 26,000** Employees (FTE) with  
**+ 20,000 certified experts**

We partner with you on your journey into a **modern, secure, and resilient digital environment** along the E2E digital value chain.

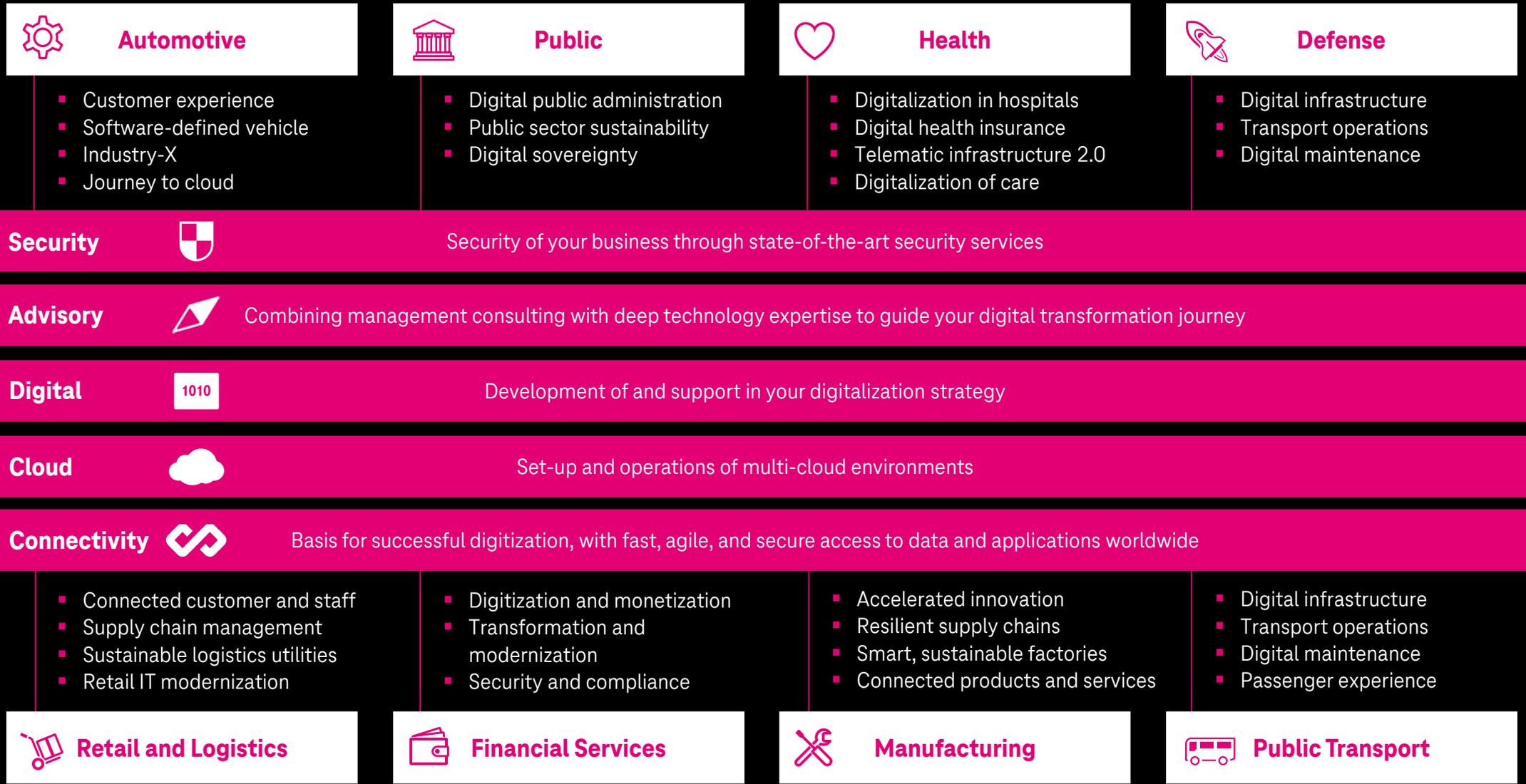


Our **setup** follows our **strategy!**



1 | Security services in T-Systems' international footprint  
2 | In cooperation with T Business, Telekom Deutschland, Germany

# Our global portfolio combines horizontal solutions with in-depth industry expertise.



We turn customers into **fans**.

“ With the **T-Systems Sovereign Cloud** powered by Google Cloud, we can now take off on the market with an **innovative, AI-based service for compliance** with the Federal Money Laundering Act.

*Maximilian Reinhard, Founder and CPO Legalian.io*

“ The **private cloud** is a compelling option for us for **operating our SAP systems**. It combines **stability and cost efficiency**. The migration to a next-generation private cloud was logical.

*Christian Eigler, Corporate CIO at Continental AG*

“ Security has always played a major role in aviation, and we are pleased that a **strong, reliable partner like Telekom Security** has our backs and responds flexibly to our needs for IT security.

*Naby Diaw, CISO at Lufthansa Group*

**Global players & hidden champions trust us**



# Our USP: combining **IT with TC**, mastering your journey **from legacy to digital**, balancing proximity and trust with a **global footprint**.

## **T Systems**



### **End-to-end ICT**

**#1 ICT player** in Germany  
**#2 ICT player** in Europe



### **Cloud, digital, AI**

The only provider with **E2E** offer  
in **multi and hybrid cloud**  
**Digital = 35%** of revenue  
**Complete AI** customer journey



### **Security in our DNA**

**#1 security player** in Germany  
**24/7** operation with **8 SOCs**  
**60,000+** attacks per hour



### **Digital sovereignty**

**Trusted** European player  
**All sovereignty demands** covered



### **Trusted and glocal**

**26 countries and 4 strategic**  
**delivery centers** globally  
**#1 German IT player**



### **Quality and reliability**

**15,000+** applications migrated  
(zero outage and zero failure)  
**98** score in **TRI:M CSAT = #1**



### **Industry expertise**

**#1** in **public sector**  
**#1** in **transport**  
**#2** in **manufacturing**



### **Sustainability**

**100%** renewable electricity  
**-55% of total emissions** by 2030

**Tried and tested by us — tailored for our customers**

# The quest for EU Sovereignty accelerates as a result of increasing mistrust among Continental Technospheres

## American Technosphere

Dominated by hyperscalers (AWS, Microsoft, Google) with a focus on global scale.



## European Technosphere

Seeking autonomy through regulations like GDPR and fostering cloud sovereignty initiatives (e.g. GAIA-X).



## Asian / Chinese Technosphere

Focused on state-controlled technology giants (Alibaba, Tencent) and strict data localization laws.



“ Trump signs CLOUD act in 2018, permitting U.S. law enforcement to access data stored overseas.



“ I will push to create a new European Sovereignty Fund. Let's make sure that the future of industry is made in Europe.”



“ Chinese data sovereignty regulation & licensing regime essentially prevents market access to external players.

# The US Administration Causes Severe Concerns in Europe and Beyond

The current movements in the political landscape have ignited a growing concern to data privacy and sovereignty, which has called upon business leaders to re-assess their cloud strategy.



**President Trump**



**Karim Khan**

## Political Pressure & Policies

- US based tech companies adhere to political views of the Trump administration. E.g. Meta's removal of fact checks on their platforms and general abandonment of diversity agenda
- Removal of Privacy and Civil Liberties Board
- Canada, Panama, Greenland, Gaza
- War in Ukraine – is US a trustworthy allied to Europe?

## International Criminal Court

- The Whitehouse imposing sanctions on the international criminal court (ICC)
- Consequently, Microsoft closed the access to their mail services for the chief prosecutor Karim Khan
- Demonstrating the US administration's policies affect IT-services delivered from American hyperscalers

# Europe is Changing

**58% of Danish companies  
are considering reducing  
their collaboration with  
American hyperscalers**

Source: Computerworld, March 2025

Consumer boycott of US products

Massive investments in Defense - Independency

Mario Draghi report: EU must improve competitiveness

Increased focus on digital sovereignty – including AI

“

**Europe is home alone**

**Friedrich Merz**  
Chancellor of Germany

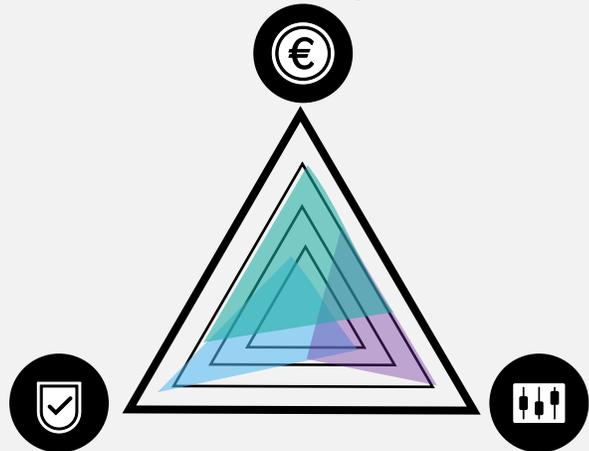
# The CIO's challenge:

## Balancing functionality, cost & sovereignty

### What market research depicts

85% say managing cloud spend is a top cloud challenge (#1)

As little **cost** as possible



As much **sovereignty & security** as necessary

77% say **security** is a top cloud challenge (#2)

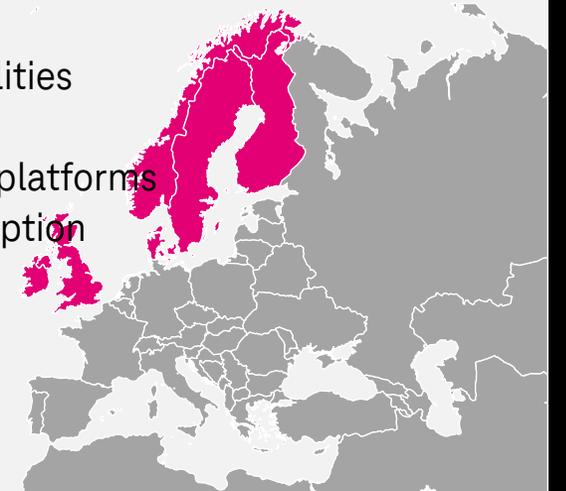
As much **functionality, customer experience & scalability** as possible

75% say **scaling** is important for the success of their cloud strategy (#2)

### What we experience in the market

While the search for European cloud alternatives has started, sovereignty isn't the only requirement when exploring new platforms

- Attractive market price
- Highest security levels
- Complete compliance with EU regulations and international standards
- Great variation of functionalities
- AI-possibilities
- Easy integration with other platforms
- Sustainable energy consumption



# There are varying degrees of Cloud Sovereignty: each mitigating increasing levels of risks but generally leading to a decreasing level of functionality

The 3 levels of sovereignty are key to understand in order to balance risk and functionality

Level of Sovereignty

## Technology Sovereignty

Ensuring control and independence over the design, development, and deployment of critical technologies.



### Prevent risk of...

- Vendor lock-in (e.g. price pressure)
- Exclusion from innovation/development (e.g. due to geo-political events)
- Restriction to vendor ecosystem

## Operational Sovereignty

Maintaining autonomy & control over the execution and management of key operational processes.



### Prevent risk of...

- Physical infrastructure manipulation (e.g. power switch, or network cable)
- Loss control over permissions (admin rights)
- System hacks
- Loss of business continuity

## Data Sovereignty

Exercising full ownership, access & regulatory compliance over data storage, processing, and usage within legal and ethical boundaries.



### Prevent risk of...

- Data loss
- Loss of IP
- Violation of regulation (e.g. GDPR)

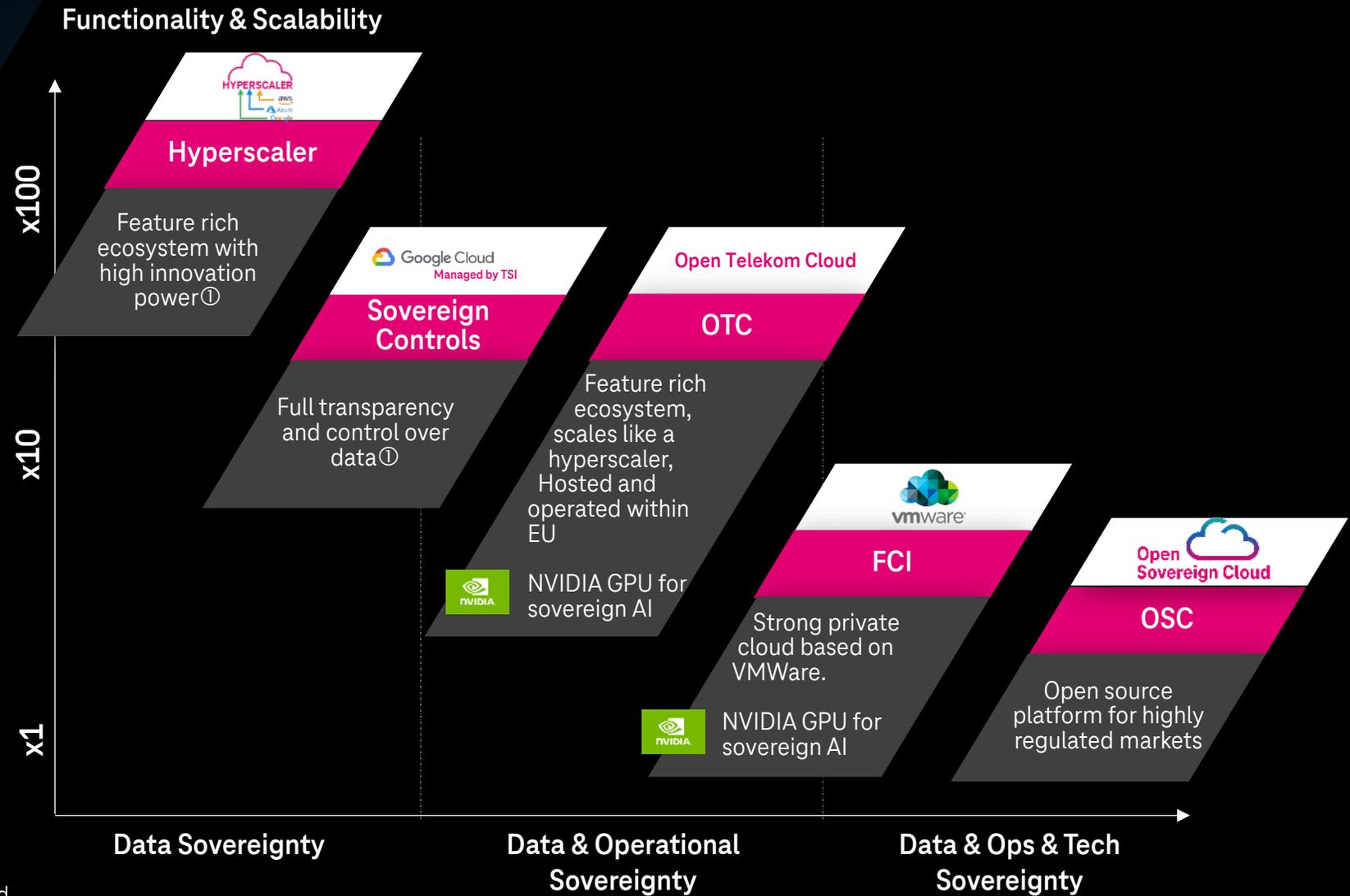
Level of Functionality

Inverse relation with functionality:

Functionality is decreasing as sovereignty increases.

We offer sovereign solutions to address all levels of sovereignty

Hybrid, multi-cloud is more relevant than ever

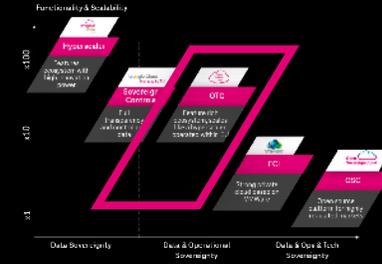


<sup>①</sup>External Key Management owned, managed and hosted by T-Systems under German legislation for AWS and GCP



# Open Telekom Cloud is the #1 European Public Cloud with more than 4,300 customers

Open  
Telekom  
Cloud



**#1** OpenStack Cloud in Europe

**99.95 %** Availability, 24/7 and zero outage quality assurance program

**100 %** Client focused with services beyond IaaS as extended Security, Analysis and AI

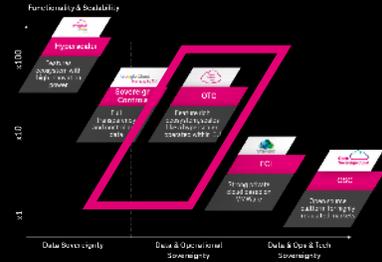
**100 %** Sovereignty over data, Operation and Technology

**100 %** Compliant with DORA, BaFin, GxP and more

**100 %** Secure with SOC 1, SOC 2, SOC 3, ISO 27001, 27017, 9001, 22301, 20000-1 and more

# OTC: Trusted by +4,000 Customers Since 2016

## Across Multiple Industries & Use-Cases



### Financial Services



### Public Sector



### Health & Life Science



### Energy



### Others



### IT-Services



### AI



### High-Performance Compute



### Security



# Our Datacenters

- 3 twin core data centers with 9 availability zones for short latencies and zero outage
- Regions DE & NL fulfil requirements for georedundancy
- High security locations
- Swiss cloud as a Community cloud for Swiss customers

**EU-NL - Region**




Availability Zone 1 (AZ1)  
Aalsmeer

Availability Zone 2 (AZ2)  
Almere

Availability Zone 3 (AZ3)  
Aalsmeer

**EU-DE – Region**




Availability Zone 1 (AZ1)  
Biere

Availability Zone 2 (AZ2)  
Magdeburg

Availability Zone 3 (AZ3)  
Biere

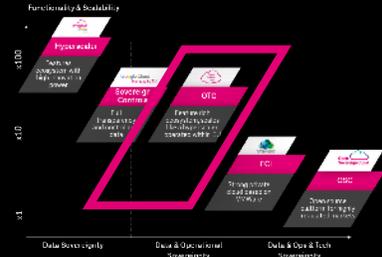
**EU-CH – Swiss**




Availability Zone 1 (AZ1)  
Zollikofen

Availability Zone 2 (AZ2)  
Bern

Availability Zone 3 (AZ3)  
Zollikofen



## Geared for the future

> 910.000 vCPUs available in total

> 26.100 assets Used in total

> 2.500 racks Used in total

> 4.5M GB RAM available in total

> 6.000 m<sup>2</sup> DC-space occupied by racks

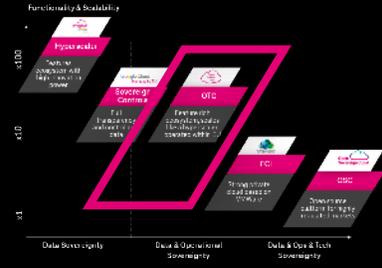
≈ 1 Exabyte Storage available (1.000.000.000 GB)

≈ max. 640.000 VMs\* can be created in total

## Certified to meet best practice



# Certified & Proven Secure



## Industry Specific



Obligation according to StGB §203 **Professional secrecy carriers** (doctors, lawyers, ...)



Obligation according to SGB §35 **Social data** (health insurance, medical clearing offices)



**BaFin**, ECB or EIOPA supervised entities in **financial sector**

**DORA Compliance**

**KRITIS**

Registered as a **KRITIS operator** at the BSI & subject to mandatory examinations



Compliance for regulatory requirements in **pharmaceutical industry**



IT applications for networked **automotive industry** of the German Association of the Automotive Industry

## Data Privacy



EU Cloud Code of Conduct Data processing in accordance with Art. 28 and 40 GDPR



Trusted Cloud Data protection requirements of the BDSG according to BMWK



Protection of personal data in the cloud



Expansion of data protection-specific processes & controls in accordance with ISO 27001

## Security



C5 Type 2 Cloud Computing Compliance Criteria Catalogue



SOC 1 Type 2 Controls over financial reporting



SOC 2 Type 2 Proof of effectiveness of the „Service Trust“ Principles



SOC 3 Public report on security, availability and confidentiality



DIN EN 50600 Construction and operation of a Data center



Information security management system



Cloud-specific controls



Quality management standards



Business continuity management system



Service management systems

## Sustainability & Safety



Energy Management



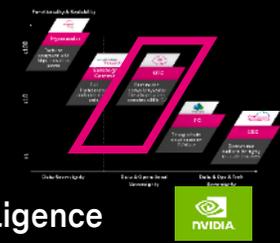
Environmental management



Occupational health and safety management system

# Our Services are Beyond IaaS

## The EU alternative to dominant hyperscalers



### Application

- Application operations management**  
Supports Cloud Container
- Distributed Event Streaming**  
Kafka
- Notifications**  
For Object storage, Autom. Scaling, Monitoring, Logging and many more
- Application performance management**
- API-Gateway**

### Analysis

- MapReduce**  
Supports Hadoop, Spark, HBase, Kafka, and Storm
- Data Ingestion**  
Single MapReduce module based on Kafka, Hbase & Redis
- Data Lake Insight**  
Supports Apache Spark & Flink
- Data Warehouse**  
Supports MapReduce
- Cloud Search**  
Elastic Search
- Data Processing Governance & Management**

### Artificial Intelligence

- ModelArts**  
Data preparation, algorithms, AI training, AI deployment
- Optical Character Recognition**

Insights

### Container

- Container**  
Kubernetes
- Container Image Repo**  
Docker
- Microservice Management**  
Istio – for CCE
- Serverless Container**

### Management

- Identity & Access Mgmt.**
- Status Dashboard**
- Online Calculator**
- Cloud Trace Auditing**
- Financial Dashboard**
- Ressource Monitoring & Alarming**
- Ressource management**
- Log Tank Logging**
- Ressource Tags**

Manage & Control

### Storage

- Block storage**
- Object storage**
- File storage**
- Disaster Recovery**
- Backup**  
Block & file storage, VM Relational/NoSQL Database

### Database

- Relational**  
MySQL, PostgreSQL, MS SQL
- Distributed Database**  
MySQL
- Document-oriented**  
compatible with MongoDB
- In Memory**  
Redis
- Large Scale DB**  
MySQL, NoSQL Cassandra
- Database migration**

### Security

- Anti-DDoS**
- Key Mgmt/ Encryption**
- Container & VM Security**
- Database Security**
- Web Application Firewall**
- Cloud Firewall**

### Compute

- Virtual machines**  
Different Instance groups Memory opt./Disk intensive/ High Performance/GPU
- Images for VMs**  
Windows Server, CentOS, Ubuntu, Red Hat, Suse Enterprise, Debian etc.
- Automatic Scaling**  
CPU, Storage, Memory, Bandwidth and many more
- Dedicated Hosts**
- Bare Metal Server**
- Functions**

### Network

- Private Network**
- Network Endpoint**
- Internet-gateway**
- NAT Gateway**
- Domain Name Service**
- Direct Connect**
- Virtual Private Network**
- Load Balancer**
- Private Link Access Service**
- Enterprise Router**

Foundation

# Matching Core Functionalities with Hyperscalers

## Open Telekom Cloud Our Services in Comparison

As of 02/25

### Open Telekom Cloud



#### Computing

Elastic Cloud Server (ECS)	Virtual Machine	Compute Engine	Elastic Compute Cloud (EC2)
Bare Metal Server (BMS)	Bare Metal Instances	Bare Metal Instances	EC2 Bare Metal Instances
Image Management Service (IMS)	VM Image Builder	Artifact Registry	EC2 Image Builder
Auto Scaling (AS)	Scale Set	Managed Instance Group	Auto Scaling
Dedicated Host (DeH)	Dedicated Host	Sole-Tenant Node	EC2 Dedicated Host
Function Graph (FG)	Azure Functions	Cloud Functions	Lambda

#### Container

Cloud Container Engine (CCE)	Kubernetes Service	Kubernetes Engine	Elastic Kubernetes Service (EKS)
Software Repository for Container (SWR)	Container Registry	Container Registry	Elastic Container Registry
Cloud Container Instance (CCI)	Azure Container Instances	/	ECS on Fargate
Application Service Mesh (ASM)	Azure Service Fabric	Service Mesh	AWS App Mesh

#### Storage

Object Storage (OS)	Azure Blob Storage	Cloud Storage	Simple Storage Service (S3)
Elastic Volume Service (EVS)	Azure Disk Storage	Persistent Disk	Elastic Block Storage (EBS)
Scalable File Service (SFS)	Azure Files	Filestore	Elastic File System (EFS)
Cloud Backup & Recovery (CBR)	Azure Backup	Backup & DR Service	Backup
Storage Disaster Recovery Service (SDRS)	Azure Site Recovery	Backup & DR Service	Elastic Disaster Recovery (DRS)

### Open Telekom Cloud



#### Network

Virtual Private Cloud (VPC)	Virtual Network
Elastic Load Balancer (ELB)	Load Balancing
Virtual Private Network (VPN)	VPN Gateway
Direct Connect (DC)	Express Route
Private Link Access Service (PLAS)	Private Link
Domain Name Service (DNS)	DNS
Enterprise Router (ER)	Virtual WAN
NAT Gateway (NATGW)	Azure NAT Gateway

#### Security

Key Management Service (KMS)	Key Vault
Web Application Firewall (WAF)	Azure WAF
Anti-DDoS	DDoS Protection
VPC Firewall	Firewall Manager
Cloud Firewall (CFW)	Azure Firewall
Database Security Service (DBSS)	Defender for Cloud (for Databases)
Host Security Service (HSS)	Defender for Cloud (for Servers/Containers)

### Open Telekom Cloud



#### Databases

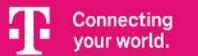
Relational Database Service (RDS)	SQL Database/Database for MySQL/PostgreSQL servers	SQL	RDS
Distributed Cache Service (DCS)	Cache for Redis	Cloud Memorystore	ElastiCache
Document Database Service (DDS)	CosmosDB	Firebase	DocumentDB
Data Replication Service (DRS)	Database Migration Service	Database Migration Service	Database Migration Service
GeminiDB	Managed Instance for Apache Cassandra	-/-	Amazon Keyspaces (for Apache Cassandra)
GaussDB (for MySQL)	-/-	-/-	Amazon Aurora
Distributed Database Middleware (DDM)	/	/	/
Data Admin Service (DAS)	-/-	SQL	AWS Management Console

#### Data Analysis & Artificial Intelligence

Cloud Search Service (CSS)	Cognitive Search	Cloud Search	OpenSearch
ModelArts (MA)	Machine Learning	AutoML	SageMaker
MapReduce Service (MRS)	HDI Insight	Cloud DataProc	EMR
Data Ingestion Service (DIS)	Data Factory	Cloud Composer	Data Pipeline
DataArts Studio (DARTS)	Data Factory	DataFlow	AWS Data Pipeline
Data Warehouse Service (DWS)	Synapse Analytics	BigQuery	Redshift
Optical Character Recognition (OCR)	AI Vision	Document AI	Textract
Data Lake Insight (DLI)	Synapse Analytics	DataProc	Amazon EMR

INTERNET:  
open-telekom-cloud.com

CONTACT:  
open-telekom-cloud.com/en/contact



### Open Telekom Cloud



#### Application

Application Operations Management (AOM)	Monitor	Monitoring	CloudWatch
Application Performance Management (APM)	Monitor	-/-	X-Ray
Simple Message Notification Service (SMN)	Notification Hub	Firebase Cloud Messaging	Simple Notification Service
Distributed Message Service (DMS)	Event Hub	Cloud Pub/Sub	MSK
Dedicated API Gateway (APIG)	APIM	Apigee	-/-

#### Management

Identity & Access Management (IAM)	Entra ID	Identity & Access Management	Identity & Access Management
Cloud Trace Service (CTS)	Log Analytics	Logging	CloudTrail
Cloud Eye (CES)	Monitor	Monitoring	CloudWatch
Log Tank Service (LTS)	Log Analytics	Logging	CloudWatch
Config	Resource Manager	Resource Manager	Config

#### Private

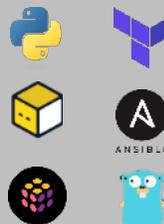
OTC Private	Azure Local	Google Distributed Cloud	AWS Outposts
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Disclaimer: Content is for informational purposes only and not intended to serve as substitution for an in-depth analysis of actual services on all platforms. The provided information is as of slide creation date and may contain current or future errors of actual service comparison content.



Compatible with the leading Infrastructure as Code tools such as Terraform, Pulumi, Ansible, OpenTofu, Python, Gopher, Sphinx and more.



# Modular Service Model

Multiple add-on services and service tiers, enabling tailoring of services to need



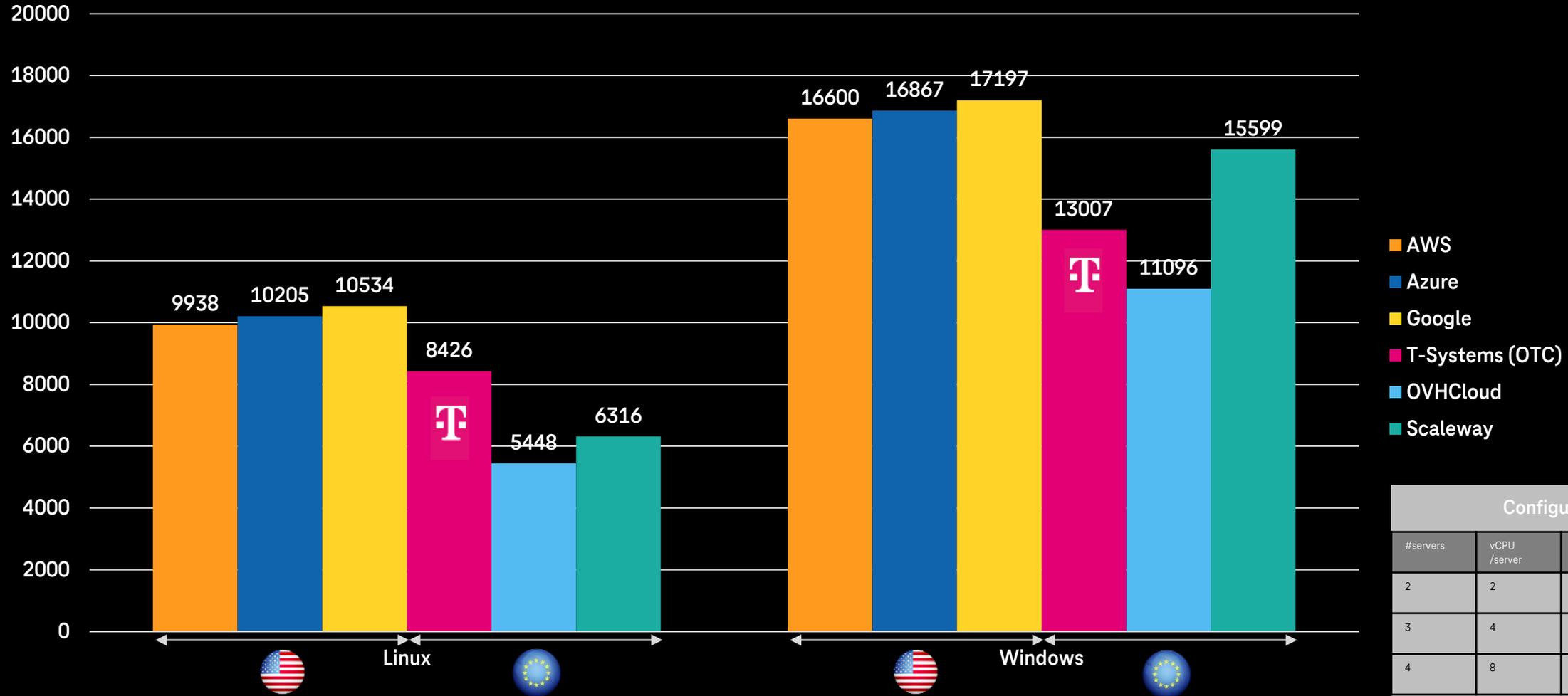
	Managed Services Basic	Managed Services Standard	Managed Services Custom
<b>Applications</b> Nginx  Tomcat  Apache 		●	●
<b>Databases</b> MSSQL / MySQL / PostgreSQL on RDS  MSSQL  MySQL  Oracle 	●	●	●
<b>Operating Systems and Containers</b> Managed Linux  Red Hat  Ubuntu  Oracle Linux  CentOS Managed Windows  Windows Server 2016 / 2019 / 2022 Managed Containers 	●	●	●
<b>Essentials</b> Maximum number of services (including operating systems, databases, applications)	10	50	Unlimited
24/7 support via Open Telekom Cloud Service Desk	●	●	●
Direct technical support contact with Open Telekom Cloud certified engineers	●	●	●
Consultancy, architecture and design support		●	●
Tenant Management / Storage Management / Network management / User management / Root cause analysis	●	●	●
Grafana dashboard 		Standard	Custom
High availability		●	●

# European Value, Global Performance

## Competitive Pricing with Open Telekom Cloud

DKK / month

### US vs European Public Cloud IaaS Price Comparison



Configuration			
#servers	vCPU /server	GB Ram / server	OS
2	2	4	Linux / Windows
3	4	8	Linux / Windows
4	8	16	Linux / Windows
Storage GB		Network	
300		3020	

# We provide **public & sovereign Cloud solutions for Europe** that are **tailored to our customer's needs**

**Major Oil and Gas Company**



**30%**  
cost reduction

**Digital transformation on a hybrid cloud strategy with FCI<sup>1</sup>**

**Large energy solutions provider**



**20%**  
cost reduction

**Future-proof hybrid cloud strategy with FCI<sup>1</sup>, OTC<sup>2</sup>, AZURE<sup>3</sup> & AWS<sup>4</sup>**

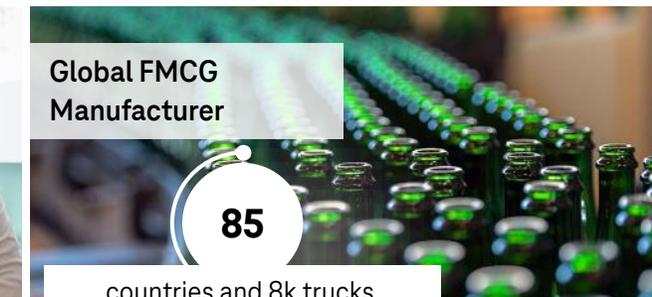
**BARMER Wallet-Cloud**



**50%**  
of German policy holders on Telekom's sovereign Cloud

**Truly sovereign cloud-based identity solution with OSC<sup>6</sup>**

**Global FMCG Manufacturer**



**85**  
countries and 8k trucks per hour orchestrated via OTC<sup>2</sup>

**Analytics + business intelligence on OTC<sup>2</sup>**

**gerresheimer**



**+90%**  
Flexibility in dynamic demand coverage

**Future-proof business-enabling IT landscape with FCI<sup>1</sup> & Azure<sup>3</sup>**

**LEGALIAN**



**80%**  
Efficiency gain for creation of Federal Money Laundering reports

**Cloud-based AI service against money laundering powered by Sovereign GCP<sup>5</sup>**

**European Union Copernicus Europe's eyes on Earth**



**78m**  
GB of space data administered on OTC<sup>2</sup>

**Predicting landslides from satellite data hosted on OTC<sup>2</sup> – potentially saving thousands of lives!**

**Continental**



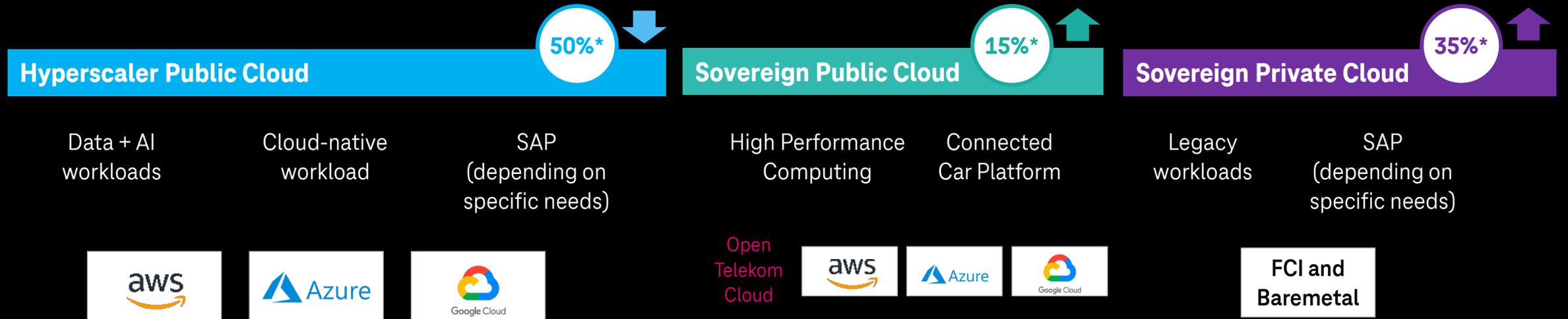
**€**  
Cost savings enabled

**Future Cloud Infrastructure<sup>1</sup> as the basis for hybrid SAP environment**

Especially our **enterprise clients require a hybrid cloud approach** with a mix of sovereign capabilities



**Illustrative example: Average distribution across our automotive customers**

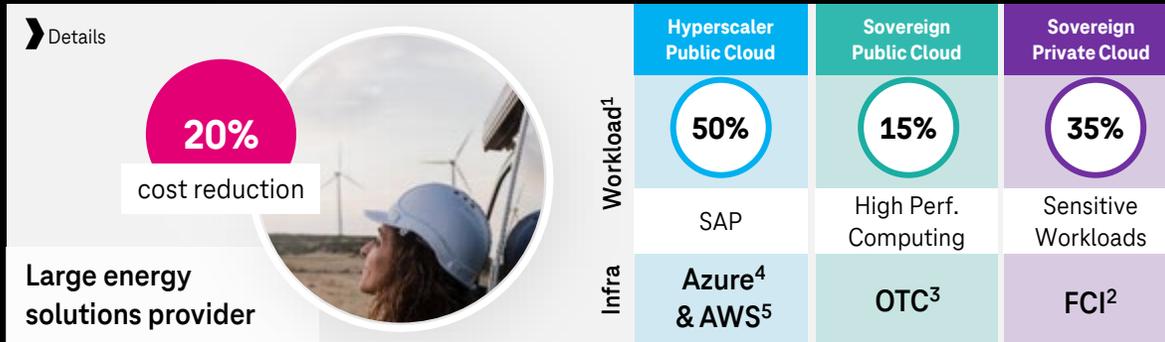


**High degree of Cloudification in total, multi-cloud for minimized vendor lock-in and hybrid-cloud for sensitive data.**

\* | based on IT-workload split; Hyperscaler Sovereign Solutions if BSI certifies for VSnfD workloads, with arrow indicating shifts(growth/decline) between clouds types

# Different workloads have different needs.

We are the only provider who can serve these different needs out of one hand.



Future-proof hybrid cloud strategy with FCI<sup>2</sup>, OTC<sup>3</sup>, AZURE<sup>4</sup> & AWS<sup>5</sup>



Future-proof business-enabling IT landscape with FCI<sup>2</sup> & Azure<sup>4</sup>



Digital transformation on a hybrid cloud strategy with Azure<sup>4</sup> & FCI<sup>2</sup>



Flexible Multi-Cloud set up with Hyperscalers, OTC<sup>3</sup> & FCI<sup>2</sup>

1 | based on IT-workload split; Hyperscaler Sovereign Solutions if BSI certifies for VSnfD workloads 2 | FCI: T-Systems Future Cloud Infrastructure 3 | OTC: Open Telekom Cloud 4 | Azure: Microsoft Azure Cloud 5 | AWS: Amazon Web Services 6 | GCP: Google Cloud Platform

**Sovereign AI** is becoming a paramount business imperative.



”

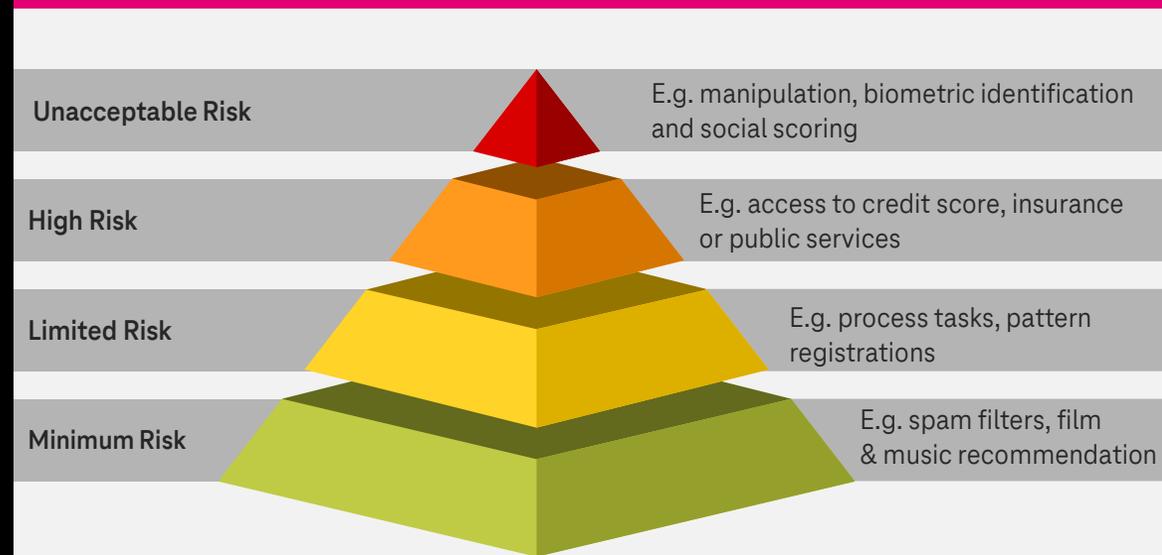
*70% of Enterprises adopting GenAI will cite **sustainability** and **Digital Sovereignty as Top Criteria** for selecting between different Public Cloud GenAI Services by 2027.*

**Gartner**<sup>®</sup>

# The EU AI Act

## Enforcing new requirements for the use of AI in 2026

### EU AI Act Risk Profiles



AI systems are considered **High Risk** by the EU if they potentially pose a significant risk to health, safety, or to the fundamental rights of citizens, including by significantly influencing the outcome of a decision-making process.

Examples of this may include:

- Assessment of eligibility for credit, healthcare, insurance, or public benefits
- Analysis for job applications or evaluation of candidates
- Safety components -> affecting manufacturers

Source: The Danish IT-Association

### Questions to ask yourself

#### Sovereignty is key when using AI for business-critical data



##### Model Training Use

AI providers may use your data to improve their models.

- Do I have, **control over the model** and do I trust the provider?
- Do I have **transparency on the training data**?



##### U.S. Surveillance Laws

Under laws like the **Cloud Act**, U.S. government agencies may compel cloud providers to hand over data—even if it's stored outside the U.S. This matters if your data is sensitive or regulated (e.g., healthcare, legal, financial, or government work).

- Do I have, **control over what data is being used, where it is located and who can access it**?



##### Compliance

The EU AI Act is complementary to GDPR and the EU Data Act.

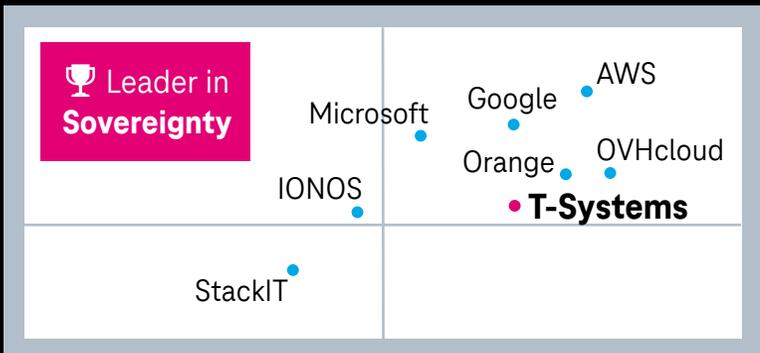
- Is the vendor I use **certified in all relevant governance and security regulations**, including ISO 27001 and the EU Data Act?



# OTC is the leading (sovereign) public cloud platform in Germany and Europe

Open  
Telekom  
Cloud

## Sovereign Cloud Infrastructure (Europe)



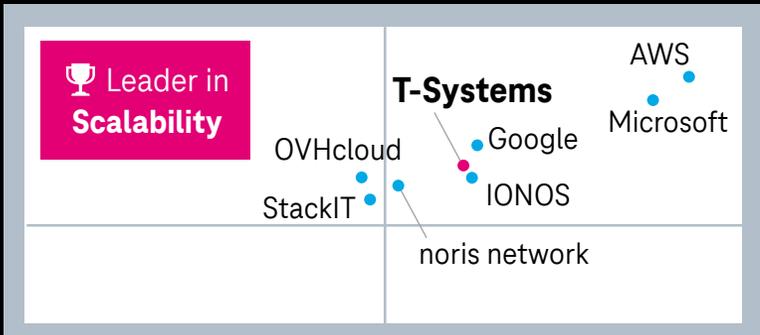
T-Systems is **the only provider on the market to offer two different sovereign public cloud platforms** (note: Google Sovereign Controls and OTC) and a hub for sovereign data ecosystems

We offer maximum sovereignty without compromising scalability. This makes us the #1 European player, overall.

## Public Cloud Platforms (Europe)



## Hyperscale Infrastructure (Germany)



T-Systems' Open Telekom Cloud (OTC) is a leading IaaS/PaaS provider in Germany, **renowned for its robust services, top-notch security, and flexibility.** It **supports businesses of all sizes across diverse industries**



Reference customers said that they're highly satisfied with its compute services. T-Systems is a **great fit for European organizations in insurance, finance, automotive, and pharmaceutical industries**



# We are leading the market across all cloud deployment models

From hyperscaler ecosystems to maximum sovereignty solutions



Open Telekom Cloud



## Hyperscaler

**3x Leader** in **AWS Ecosystem Services** (ISG)  
**4x Leader** in **Microsoft Cloud Ecosystem** (ISG)  
**Leader** in **AWS and Azure End-to-End Cloud Infrastructure Management Services** (NelsonHall)  
**#1** in **managed public cloud** market share (Germany) (PAC)  
**10,000 cloud experts** across all platforms

**-25% data center costs thanks to Azure migration**



## Sovereign Controls / GDCH

**“Best in class”** in **Google Cloud Platform IT Ecosystem** in Germany (PAC)  
**2x Leader** in **Google Cloud Partner Ecosystem** (ISG)  
**Leader** in **Google Cloud Platform E2E Cloud Infrastructure Management Services** (NelsonHall)  
**40+ certifications** across **Germany** (e.g., C5, BaFin), **EU** (GDPR, TISAX, ...) and the **world** (SOC 1 | 2 | 3, ...) ([more](#))

**80% efficiency gain**  
**100% compliant\***



## OTC

**#1 public cloud platform** in Europe. Full score for **digital sovereignty: 5 of 5** points (Forrester)  
**Leader** in **hyperscale infrastructure** in Germany (ISG)  
**Leader** in **sovereign cloud infrastructure services** in Europe (ISG)  
**4,000+ B2B customers**  
**26 certifications**, incl. C5 Type 2, KRITIS, TISAX, **BSI IT-Grundschutz coming in 2025** ([more](#))

**70m GB of space data administered**



## FCI

**2x Leader** in **private/hybrid** for enterprise and midmarket in Germany: **managed services** and **managed hosting** (ISG)  
**#1** in **hosted private cloud** and in **private cloud C&SI and AM** market share (Germany) (PAC)  
**150 large enterprise clients** hosted with critical workloads  
**6 hosting locations** globally  
**20+ key certifications**, incl. BSI IT-Grundschutz ([more](#))

**6th biggest SAP instance** in the world with 30.000 users across the globe

## OSC

**100% sovereign infrastructure:** data, operations & technology  
**100% confidential computing architecture** for full control  
**100% open-source:** No third-party dependency  
**2 regions live:** Magdeburg/Biere and Frankfurt am Main  
**1.1m customers** using Gematik approved security certification  
**9+ key certifications** with more to come ([more](#))

**50% of German policy holders hosted** on our Sovereign Cloud



# How to get started

Demonstration of the OTC platform is followed by multiple options...



## PoC Migration

Classic VMware or Cloud Native workloads.

Test and try out the new platform with a single use-case. Quick ROI, easy way to production and foster road to full scale operations in a sovereign setup



## Business Continuity Plan

Build a fallback plan that easily can be executed, enabling you to move from existing setup to compliant sovereign setup immediately in production



## PoC Build New

Establish trusted landing zone on platform in complete sovereign setup. Enabling developers to create new innovations and applications



## Sovereignty Guidance

Consulting addressing the specific requirements of compliance, data sovereignty, security, and regulations.  
**Outcome:** Tailor-made recommendation and implementation plan to leverage sovereign cloud

T-Systems Supports  
All Options

# Recommendations



## No Platform to Rule them All

It's not a question of either/or – but both/and as we look for sovereign cloud solutions. The hybrid/multi cloud paradigm is here to stay.



## Platform to Match Business Needs

All platforms have their advantages and disadvantages. Hence, it's paramount the choice of platform matches your business needs to optimize cloud spend – the right workload to the right platform



## Don't Panic

Learn from the experiences of the first Public Cloud wave. Take your time to assess what applications, data and workloads need to be where – make profound decisions.



## Learn & Scale

Start small with a dedicated pilot project. Learn from the project, evaluate, adjust, and then scale.

# Questions & Answers

**THANK  
YOU!**

# We offer the right cloud mix for every customer demand based on Public Big Tech Clouds and our own Cloud portfolio

## Open Telekom Cloud

Our Magenta Public Cloud Platform – reliable, sustainable & secure

**6,000m<sup>2</sup>** of Data Center space

**1 Exabyte** = 1 bn GB storage

**3** high security twin-core datacenters in DE, NL and CH

**4,300** and more B2B customers

**70m** GB of space data administered for  



**FORRESTER**  
Wave™: Public Cloud Platforms in Europe

Open Telekom Cloud

## FCI (Future Cloud Infrastructure)

Leading European Private Cloud for mission critical workloads

**95,000** CPU cores, doubled since 2023, running on 100% renewable energy

**150** large enterprise clients hosted with business-critical workloads

Hosted in **6** countries: DE, ES, CH, AT, NL, US

**4** main flavors: Dedicated, shared, on premise, robo

At  we run **6th** biggest SAP instance in the world with 30.000 users across the globe



**isc**  
Private/Hybrid Cloud Data Center Services & Solutions

**FCI**

## OSC (Open Sovereign Cloud)

100% sovereign infrastructure for confidential workloads

**100%** Sovereign infrastructure: data -, operations - & technology sovereignty

**1,1 m** Customers using Gematik approved security certification

**2** regions live: Magdeburg/Biere and Frankfurt am Main

**100%** Confidential Computing architecture for full control & sovereignty

**50%** of German policy holders hosted on Telekom's Sovereign Cloud



# The Leading European Cloud Provider!



## Public Cloud



Wave™: Public Cloud Platforms in Europe

FORRESTER

### Strengths according to analysts:

- T-Systems' **AI capabilities are ahead of the competition**. Its Open Telekom Cloud supports a **wide variety of AI approaches** and provides a **comprehensive portfolio for the entire analytics lifecycle**.
- Open Telekom Cloud is a **great fit for European organizations** in insurance, finance, automotive, and pharmaceutical industries.

## Private/ Hybrid Cloud



Private/Hybrid Cloud Data Center Services & Solutions

ISG

## Infrastructure Services



Mainframe - Services and Solutions

NelsonHall



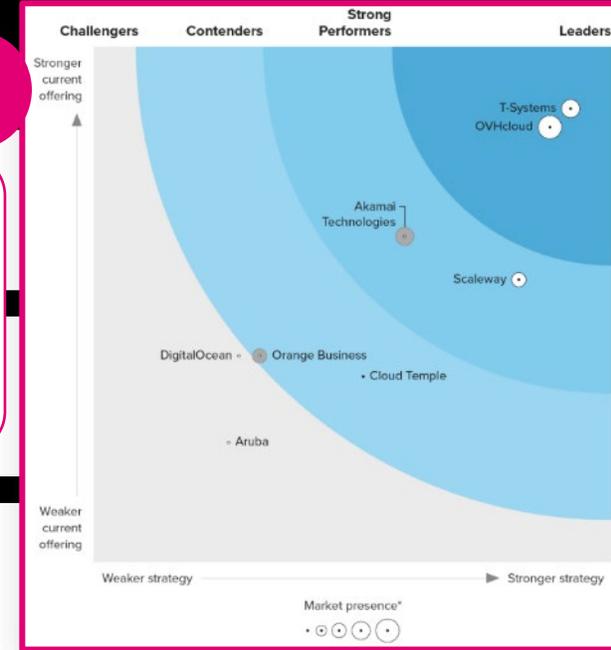
End-to-end Cloud Infra

NelsonHall



Advanced Digital Workplace Services

NelsonHall



## Multi-Cloud



Sovereign Cloud Infrastructure Services 2024, Europe

ISG



Hyperscale Infrastructure and Platform Services 2024, Germany

ISG



SAP HANA Infrastructure Services 2024, Germany

ISG



Managed Services 2024, Brazil

ISG

## Partner Ecosystem



Google Cloud Ecosystem Partners

NelsonHall



Microsoft Partner Ecosystem

NelsonHall



Universe of Cloud Infrastructure Service Providers and Public Cloud Service Integrators

PENTEO



RADAR GCP Ecosystem (GCP, AWS, Azure)

telknowlogy PAC



AWS Partner Ecosystem 2024, Germany, Professional Services / Managed Services

ISG



Google Cloud Partner Ecosystem 2024, Europe, Managed Services

ISG



AWS Partner Ecosystem 2024, Germany, AWS SAP Workloads

ISG



Google Cloud Partner Ecosystem 2024, Europe, Implementation and Integration Services

ISG

# = Number of leadership positions in each report



[Read the full report here](#)

