



BE-CYBER 2026

Buying Sovereign

*European Commission – DG DIGIT
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Set the scene

A technical buyer

Who speaks? A technical broker



Chairman of the Cloud Council

Technical governance of the cloud adoption for the European Commission

Head of three procurement lines for the EUIBAs

A broker for: Cloud, Software and Professional Services

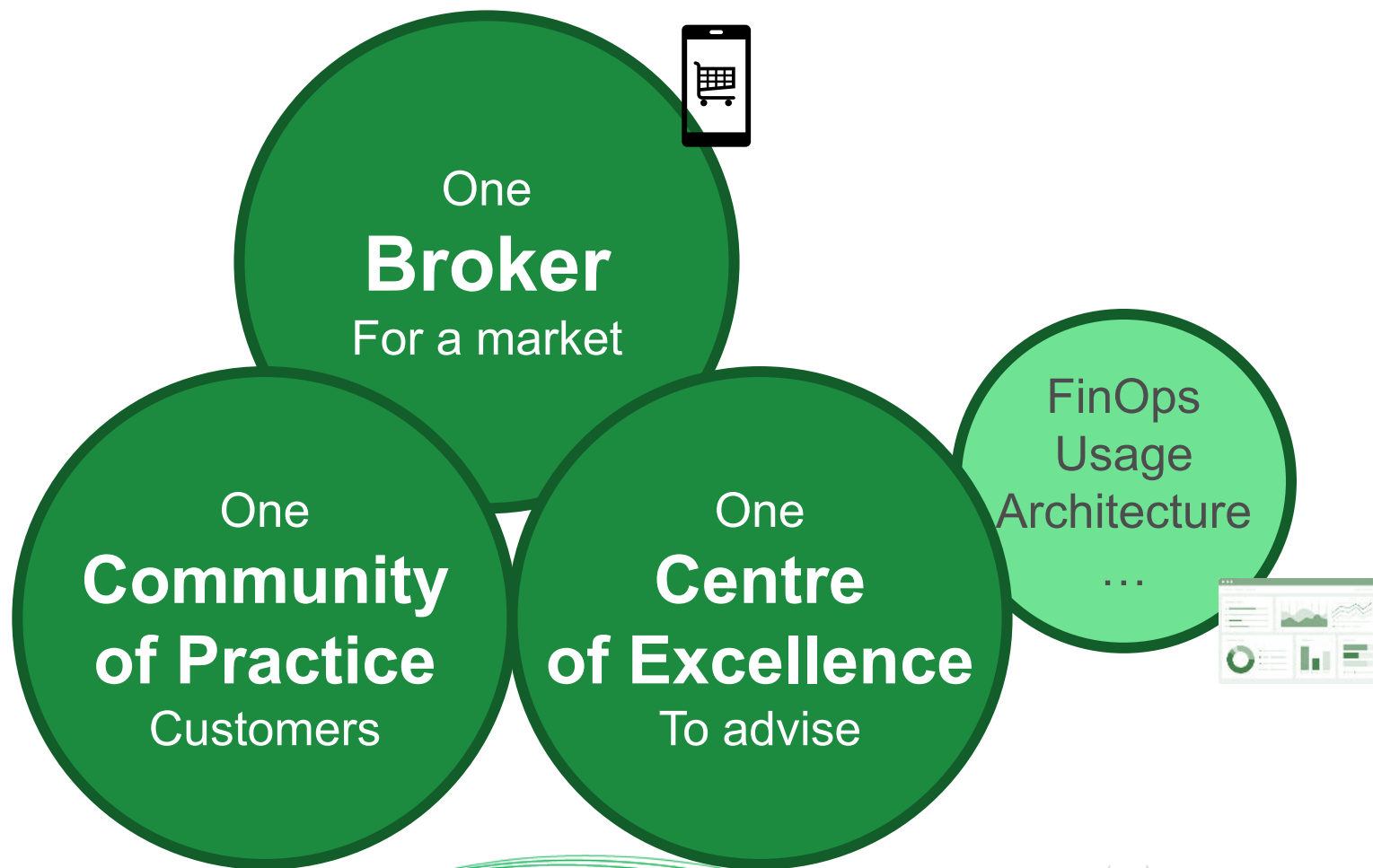
... a software engineer

Fallen in procurement to support his colleagues, so provides procurement as a service

Cloud and Software Brokering For EUIBAs

**Contracts
are
Never
Enough**

The world
is going
very fast



Cloud and Software Brokering by the EUIBAs

**What does it
represent in
volume?**

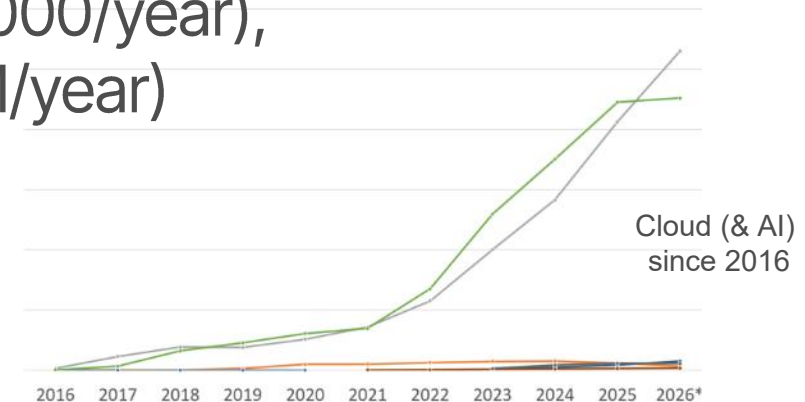
**For 70.000 staff
In 80 bodies
With very different
strategies**

Cloud (& AI)

9 suppliers, 1B€ turnover on 6 years
(80M/year, growing fast)

Software (& AI)

1600 suppliers, 10000 software titles,
11000 transactions (3000/year),
900M turnover (300M/year)



Buying Sovereign Cloud

A practical example

A vintage-style map of South America is shown, with countries like Venezuela, Peru, Brazil, and Argentina labeled. The map is covered with numerous small red blocks, some of which are placed on the landmasses and others in the surrounding blue ocean. Two dolphins are illustrated in the water. The map has a yellow border and the word 'Pavilion' is visible in the bottom right corner.

The world changes

Customer needs **What did we search for?**

**Sovereign
Public Cloud**

**Dedicated Sovereign
Cloud Region
for the Institutions**



Cloud Edge
Stack
That can be
used to
Build a cloud
(in case)



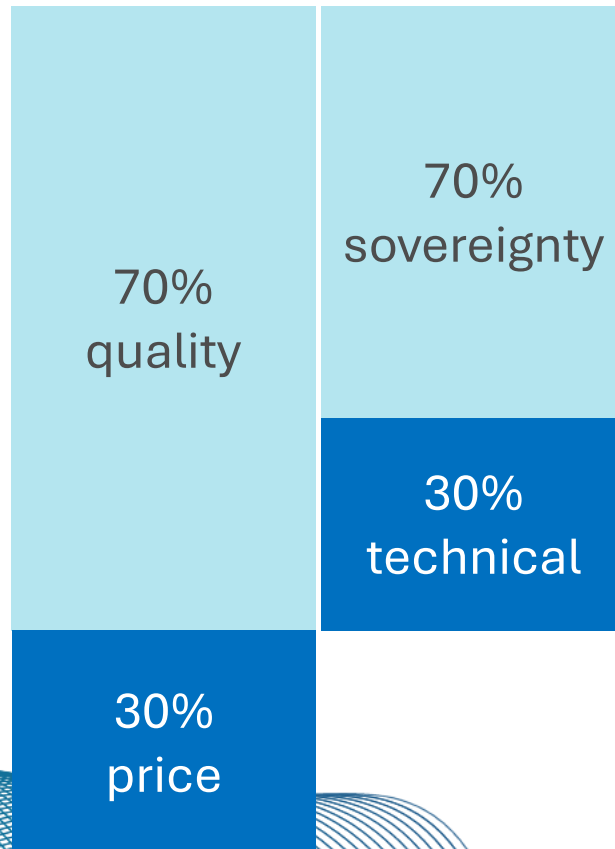
180M€
Infrastructure
6 years

IaaS/**PaaS**/AI
Where EU
is competitive



Evaluation The recipe, The Framework

Award criteria



Sovereignty

Sovereignty Effectiveness Assurance Levels	Sovereignty Objective Descriptions
SEAL-0	<i>No Sovereignty:</i> Service, technology or operations under exclusive control of non-EU third parties , governed entirely by non-EU jurisdictions .
SEAL-1	<i>Jurisdictional Sovereignty:</i> EU law formally applies with limited practical enforceability ; service, technology or operations under exclusive control of non-EU third parties.
SEAL-2	<i>Data Sovereignty:</i> EU jurisdictions apply , with material dependencies remain ; service, technology or operations under indirect control of non-EU third parties.
SEAL-3	<i>Technological Sovereignty:</i> EU jurisdictions apply , EU actors exercising meaningful but not full influence ; service, technology or operations under marginal control of non-EU third parties.
SEAL-4	<i>Full Digital Sovereignty:</i> Technology and operations under complete EU control , subject only to EU jurisdiction , with no critical non-EU dependencies .



All layers from processors to software



Measure, Do not exclude

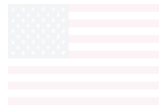


Show foster to different risk appetite



European Commission

Participation **As planned**



EU cloud stacks operated by EU Public Sector entities

EU state-owned operator integrating supplied technology from EU pure players



EU pure players

Native European cloud providers with own technology



EU Custom setups

Opportunistic bids assembling a cloud setup specifically for this tender



Foreign cloud stacks operated by EU integrators

EU integrators operating hyperscaler' s supplied technology; rarely joint ventures



US Hyperscalers

« Sovereign » offering of global hyperscalers, operated by dedicated EU subsidiaries with reinforced local controls

Participation **Winners**



EU clouds group
Public sector entity

Dedicated Cloud Region ★
Open technologies

Scalability: Medium

SEAL-3



clever cloud



OVHcloud



EU cloud
Private sector 150M€+

Open technologies
Shared cloud regions

Scalability: High

SEAL-3



EU cloud
Private sector 120M€+

Open technologies
Shared cloud regions

Scalability: High

SEAL-3



EU Integrator - US cloud stack
Private sector with MS control

Proprietary tech, with an Open tropism
Shared cloud region

 SecNumCloud

Scalability: Medium

SEAL-2



THALES
L'expertise en sécurité



Google Cloud
La puissance d'innovation

Framework To make things clear



ALL THIS IS ABOUT
RESISTING TO
POTENTIAL
KILL-SWITCH

SEAL-4

→ NOT IN THE EU –*anywhere?*–

SEAL-3

→ INVESTMENT SUSTAINABLE

SEAL-2

→ 6-18 MONTHS TO REACT

SEAL-1

→ SUDDEN DEATH 

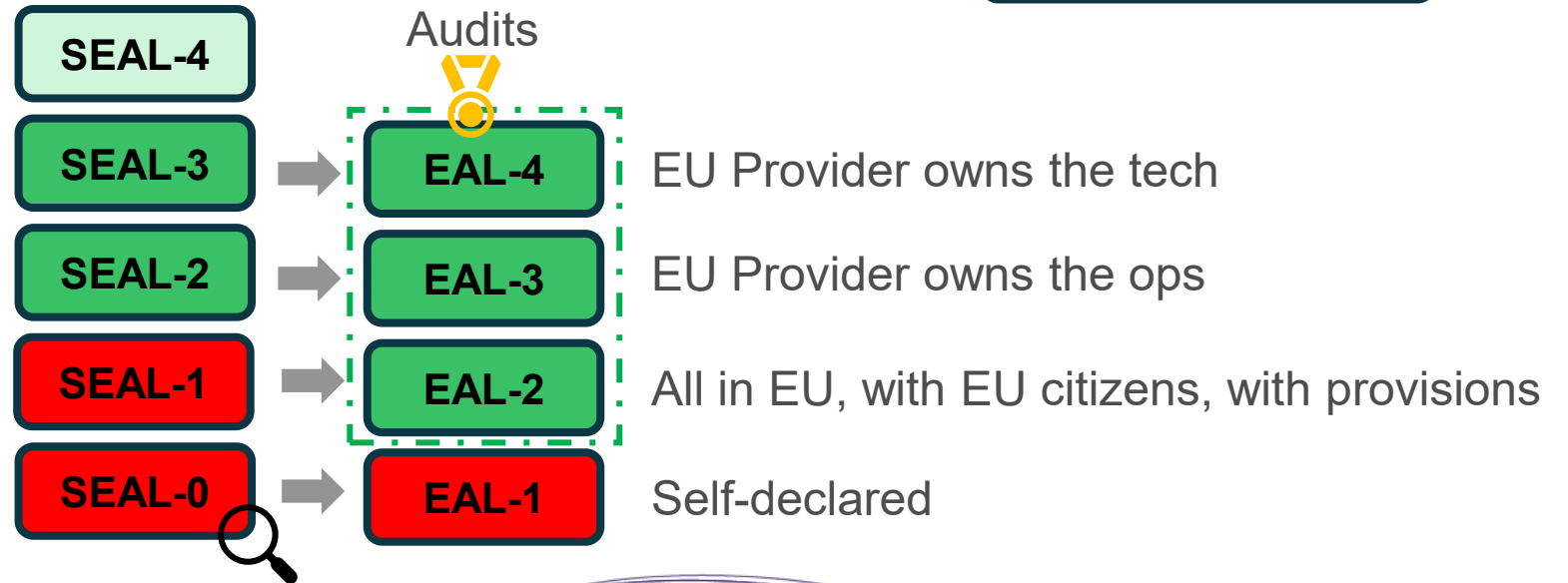
SEAL-0



CAIDA Lessons learnt

fundamental for preserving Union public order. Preserving the protection of public order of the Union and its Member States requires a prudent but firm political, legal and operational response for both national and Union-level award procedures, in full respect of international commitments. To protect and preserve the public order of the Union and its Member States, contracting authorities whose activities have been identified on the basis of the Member State risk assessment should therefore procure only the cloud computing service providing the appropriate level of assurance between levels 2 and 4. A minimum assurance level, by mandating Union assurance level 1 across the Union, is necessary to establish a consistent baseline of safeguards for the public sector, thereby reducing vulnerabilities in the public sector to third country access to Union data and disruption of services.

EAL-2 MIN for NIS2



Thank you for your attention!