T Cloud

Zwischen Abhängigkeit und Kontrolle: Souveränität in der Cloud- & KI-Ära

Lars Neumann | 8. Mai 2026



Digital dependencies are becoming a fundamental risk

The **EU relies on foreign countries** for over 80% of digital products, services, infrastructure and intellectual property.

This creates **fundamental risks**!



Mario Draghi,
The future of European competitiveness

Risk	Example
Fiancial	EU could tax big tech if Trump trade talks fail, Von der Leyen tells FT By **Reuters** April 10, 2025 10:57 PM GMT+2 · Updated April 10, 2025
Operative	Trump sanctions on International Criminal Court prosecutor halt tribunal's work **Molly Quell, Associated Press** Thu 15 May 2025 at 9:55 am CEST
Trust & Security	Microsoft admits it would have to let Trump spy on EU data if demanded News By Craig Hale published July 28, 2025 Microsoft says it can't promise data sovereignty for EU firms

70 % of European workloads are in US-Clouds



Dominant US Hyperscaler

aws

Azure

Google



European Cloud Provider

T Cloud

OVHcloud

STACKIT
A Brand of Schwarz Digits



Chinese Cloud Provider

HUAWEI

Tencent Cloud

Alibaba Cloud

Souvereignty is basis for secure Innovation and AI-Usage

The CIO optimization problem...

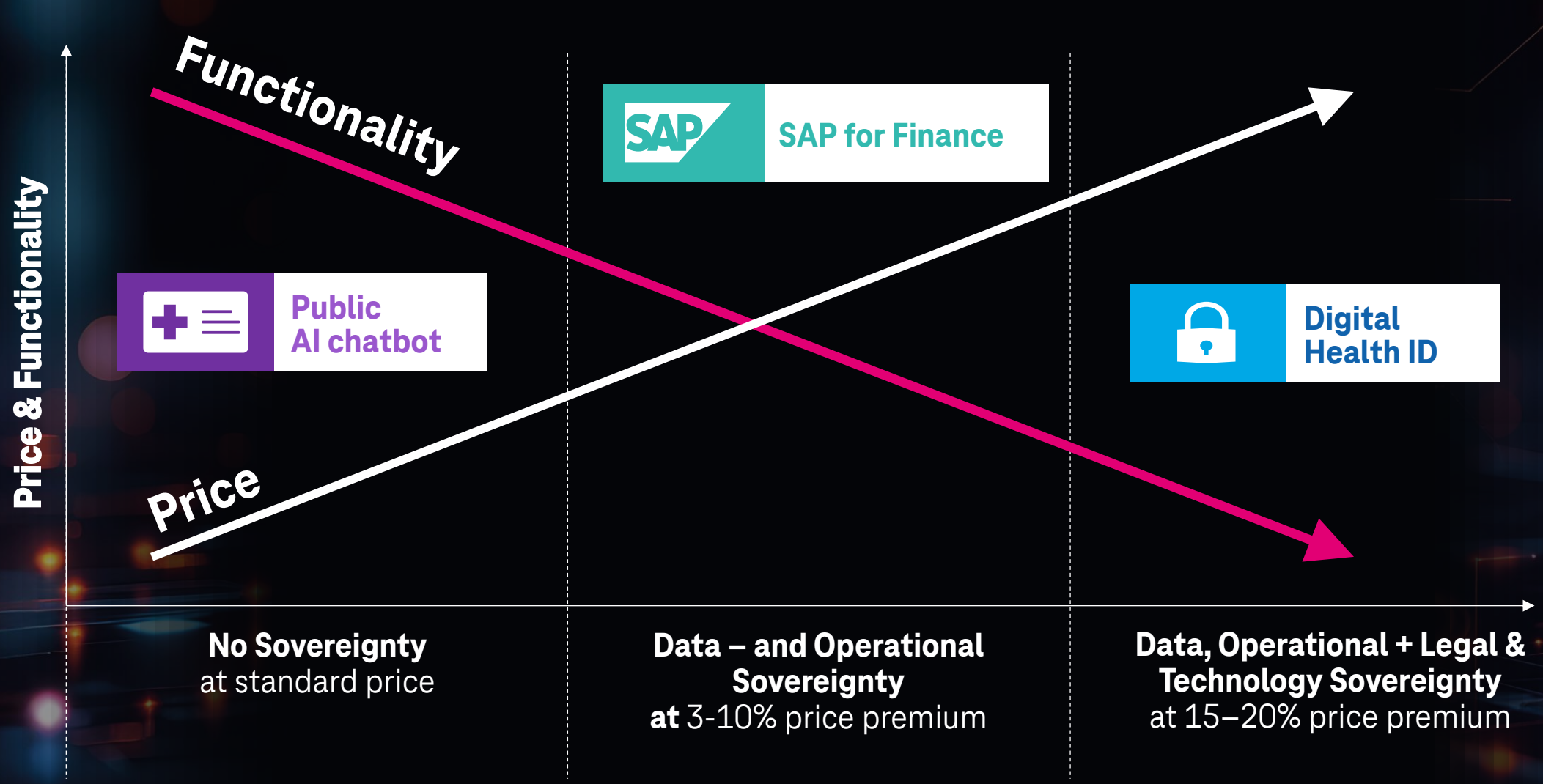
As much **functionality** as possible

As much **sovereignty** as necessary

As little **cost** as possible



… must be considered for every workload



Ground Zero of Disruption

Massive Gap opens to AI Native‘s… WIDENING!



45-60% Jobs threatened by new automation potential until 2030

White-collar is more exposed than blue-collar in the near term

5%→ 40% Enterprises planning task specific AI Agent implementions until end of 2026

Caution: „Pilot Trap“ & no AI native process approach

450 Bn $ Added economic value in 2028 by AI agents through revenue uplift and cost savings

*Impact is not distributed evenly - "Future-built" companies **pull away from competitors with exponential effect** →*

Source: you name them … Gartner, McKinsey, BCG, Forrester, Capgemini etc.

Disruption is NOW! Clear pattern visible

Major restructuring; 11k – 22k job cuts in global sales / marketing, azure cloud, xBox gaming

Drastic reduction of Audit teams; “Data Science” becomes a must for tax advisers

80% of software stack and chip development already done by AI

Massive restructuring program for approx. 10k jobs; forced reskilling instead of hiring

“Year of Efficiency”: 10% workforce cut due to AI efficieny – 2nd wave in HY2 2026

JP Morgan Chase has built a team of ~ 2k LLM specialists & data scientists to analyze market shifts

Hiring freeze on around 8,000 back-office roles to be replaced by AI

Skill pressure on Tata staff: “Upskill or leave” message

OpenClaw sold to OpenAI for an estimated **$1 billion**
→ **Company has one employee and a very high token bill …**

■ ■ ■

Source: public announcements

Why it happens: The Superpower of AI Agents



AI agents don't just "know things"—they *do things and* combine intelligence with action

Autonomy — Give a goal, they figure out the path

Speed at Scale — Work 24/7 no burnout

Perfect Memory — Recall massive context across conversations and systems

Tool Mastery — Usage of APIs, apps, databases

Decision-Making — Evaluation of options and choice of actions

Adaptability — Learn from feedback, adjust and improve

End-to-End Execution — From research → planning → action → follow-up

What this means: AI agents turn intelligence into *outcomes*, not just information.

Addressable EU Market Size & Growth Trajectory

EU AI market is accelerating – driven by sovereign AI mandates, GenAI adoption

€42B
EU AI Market Size Today
Statista, 2024

€190B 2030
Projected Market Size
Statista Market Insights

33% CAGR
Annual Growth Rate (2025–30)
Grand View Research

€200B Committed
EU AI Continent Action Plan
European Commission, Apr 2025

MARKET SIZE BY KEY COUNTRY

Source: Grand View Research (2024), Statista Market Insights, European Commission

Germany
32.3% | €13.5B — Largest market - automotive, manufacturing, Industry 4.0 hub

United Kingdom
24.8% | €10.4B — BFSI, pharma & sovereign AI unit with dedicated compute roadmap

France
16.2% | €6.8B — Home to Mistral AI; €109B national AI investment commitment

Nordics (DK, FI, SE)
11.5% | €4.8B — Highest enterprise adoption (Denmark 42%, Finland 38%)

Netherlands & Benelux
8.1% | €3.4B — Cloud & data center hub; strong AI startup ecosystem

Italy & Spain
7.1% | €3.0B — Growing fast - public sector digitization, smart mobility

FASTEST GROWING SEGMENTS

45% Generative AI
€63B global (2025) → €220B (2030)
ABI Research, Sep 2025

43% AI Services (Consulting, Integration)
Fastest-growing solution segment in EU
Grand View Research, 2025

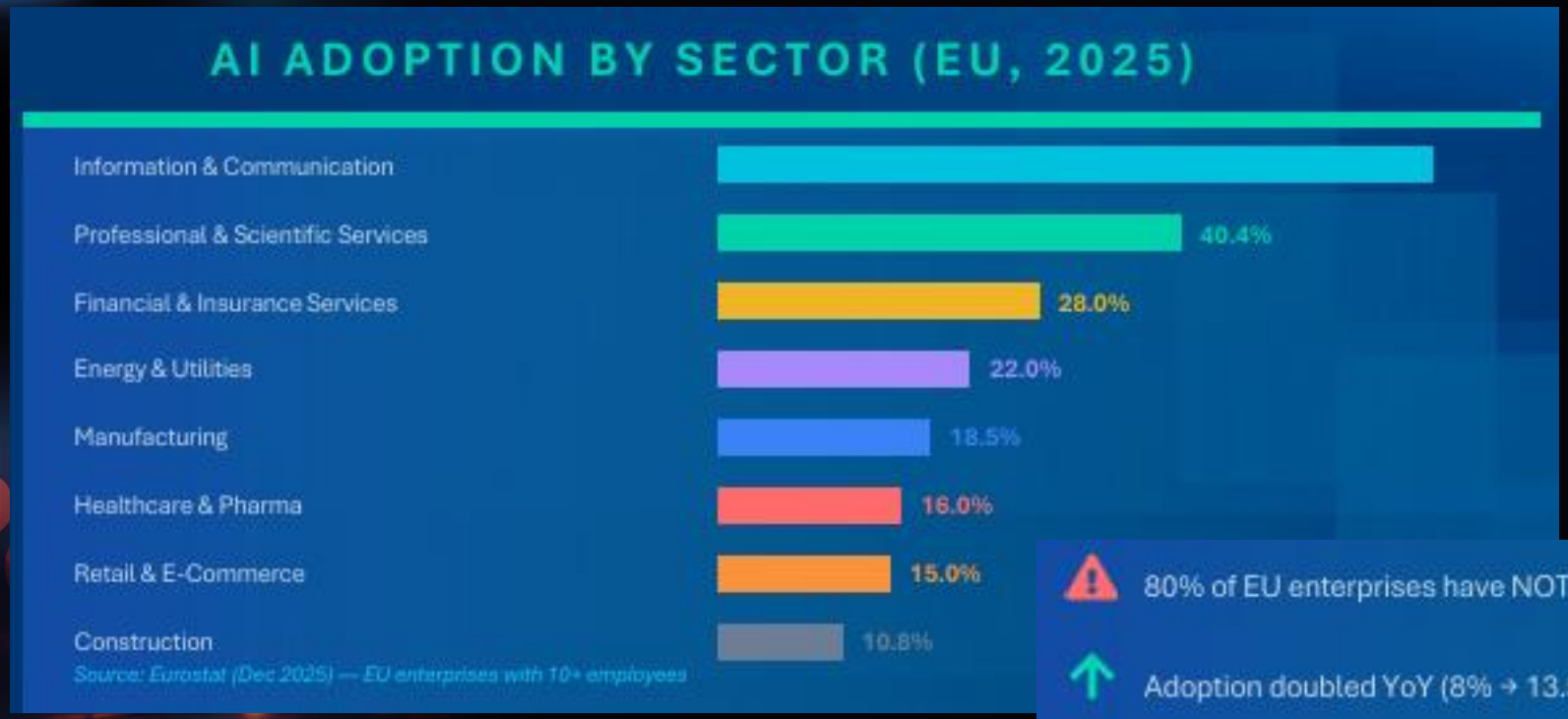
40% Machine Vision & Computer Vision
Manufacturing, autonomous vehicles, medical imaging
Grand View Research, 2025

38% AI Hardware (GPUs, Edge, AI Chips)
Sovereign AI infra push driving GPU demand
Fortune Business Insights, 2025

39% Sales & Marketing AI
CRM, personalization, campaign optimization
Grand View Research, 2025

30% Core Agentic AI
10% orgs use today; 82% plan adoption in 3 yrs
Capgemini / Gartner, 2025

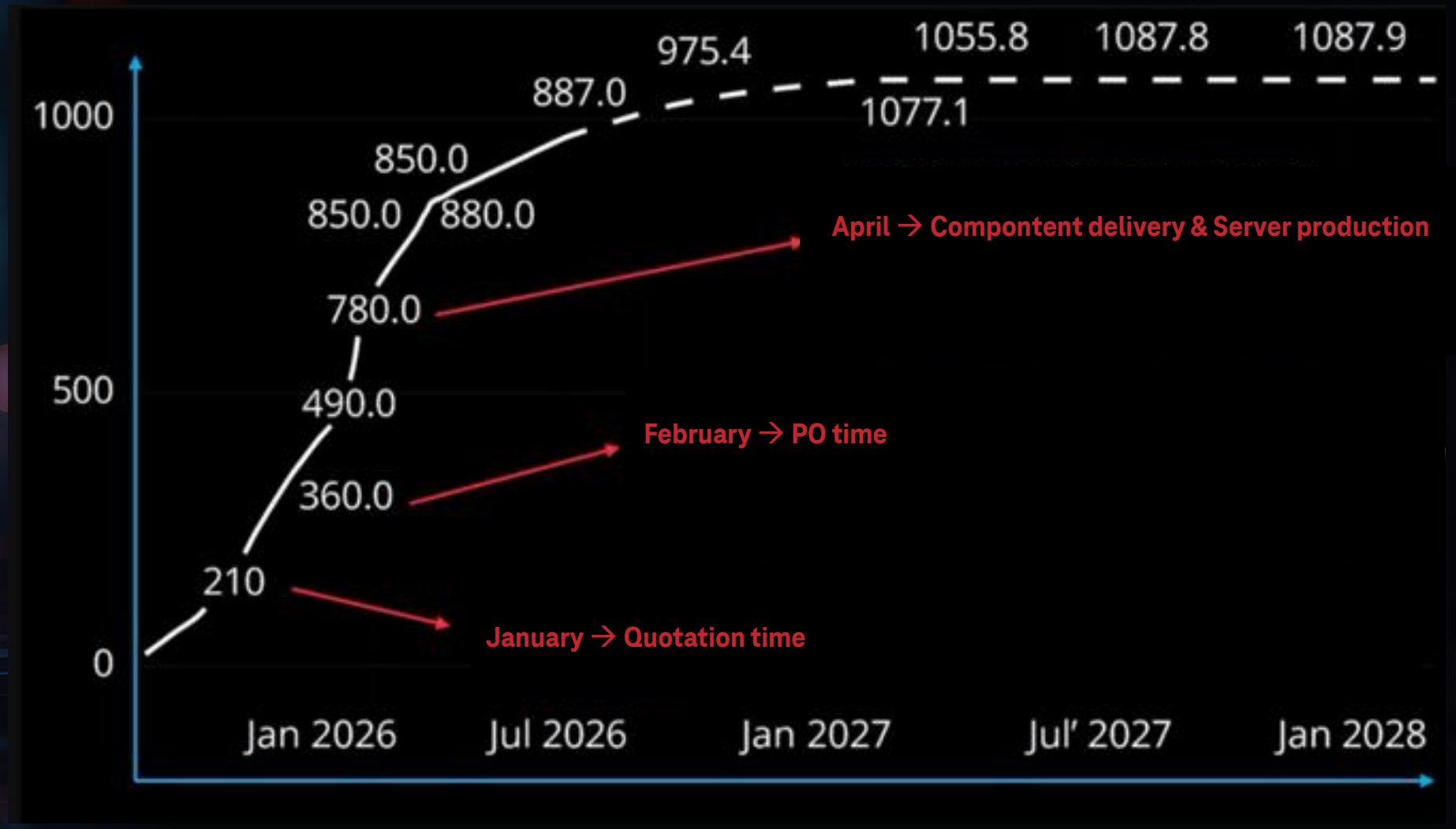
EU Enterprises Expectations & Opportunity on AI & Cloud



- 80% of EU enterprises have NOT adopted AI yet - massive greenfield opportunity
- Adoption doubled YoY (8% → 13.5% → 20%) - demand is accelerating, not flattening
- Sovereignty is now a procurement requirement, not a preference - RFPs mandate EU data residency
- Enterprises need platforms, not GPUs - the gap is in MLOps, tooling, and compliance-ready serving

Sources: Eurostat, Gartner, McKinsey, AI Journal, Scalefocus (2025–26)

View only on: DDR5_RDIMM_32GB (S)



Deshalb bauen wir jetzt souveräne KI-Rechenkapazitäten

KI-Gigafactories: DT unterstützt den EU AI Continent Plan

- DT hat Interesse bekundet, KI-Gigafactories mit ~100 000 GPUs in Deutschland zu errichten[1]

Cooperation

Industrial AI Cloud: Schnellboot in Richtung KI-Gigafactories

- DT + NVIDIA Kollaboration um die Industrie jetzt mit ~10 000 GPUs zu beschleunigen & zu unterstützen

Juni 2025: Ankündigung
DT und NVIDIA kündigen eine **Partnerschaft** zum Aufbau der 1. europäischen Industrial AI Cloud an

4. November 2025 - Berlin
DT, NVIDIA und Partner (SAP, Siemens, EY, Perplexity usw.) feiern Richtfest

4. Februar 2026: Go-Live
Geplanter **Betriebsstart der Industrial AI Cloud** mit den ersten laufenden Workloads

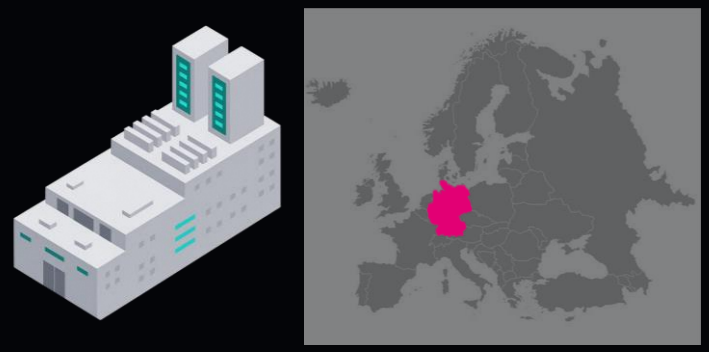
2027: Go-Live der KI-Gigafactory
Erste **EU-gestützte KI-Gigafactory nimmt den Betrieb auf** und wird laufend erweitert


NVIDIA and Deutsche Telekom Partner to Advance Germany's Sovereign AI

The companies are building the world's first industrial AI cloud for European manufacturers.

June 13, 2025 by Markus Hacker





1 | Die offizielle EU AI Gigafactory Ausschreibung wird für Anfang 2026 erwartet, nachdem im Juni 2025 eine Interessensbekundung erfolgte.