



Sovereign Cloud, Private Control

Hyperscaler Trends in 2025 & Beyond

US Government Tech Meetup & Podcast
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Mattermost, Inc.

Transforming Mission-Critical Collaborative Workflows



Jason Blais

VP Product, Mattermost

BMath, MMath

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Jason has 10+ years of experience leading product for mission-critical teams, working directly with top defense contractors, regional partners, and cybersecurity experts across the US DoD, NATO, EU & APAC regions.

About Mattermost:

Mattermost is the leading Open Core Collaborative Workflow Platform for Defense, Intelligence & Critical Infrastructure.

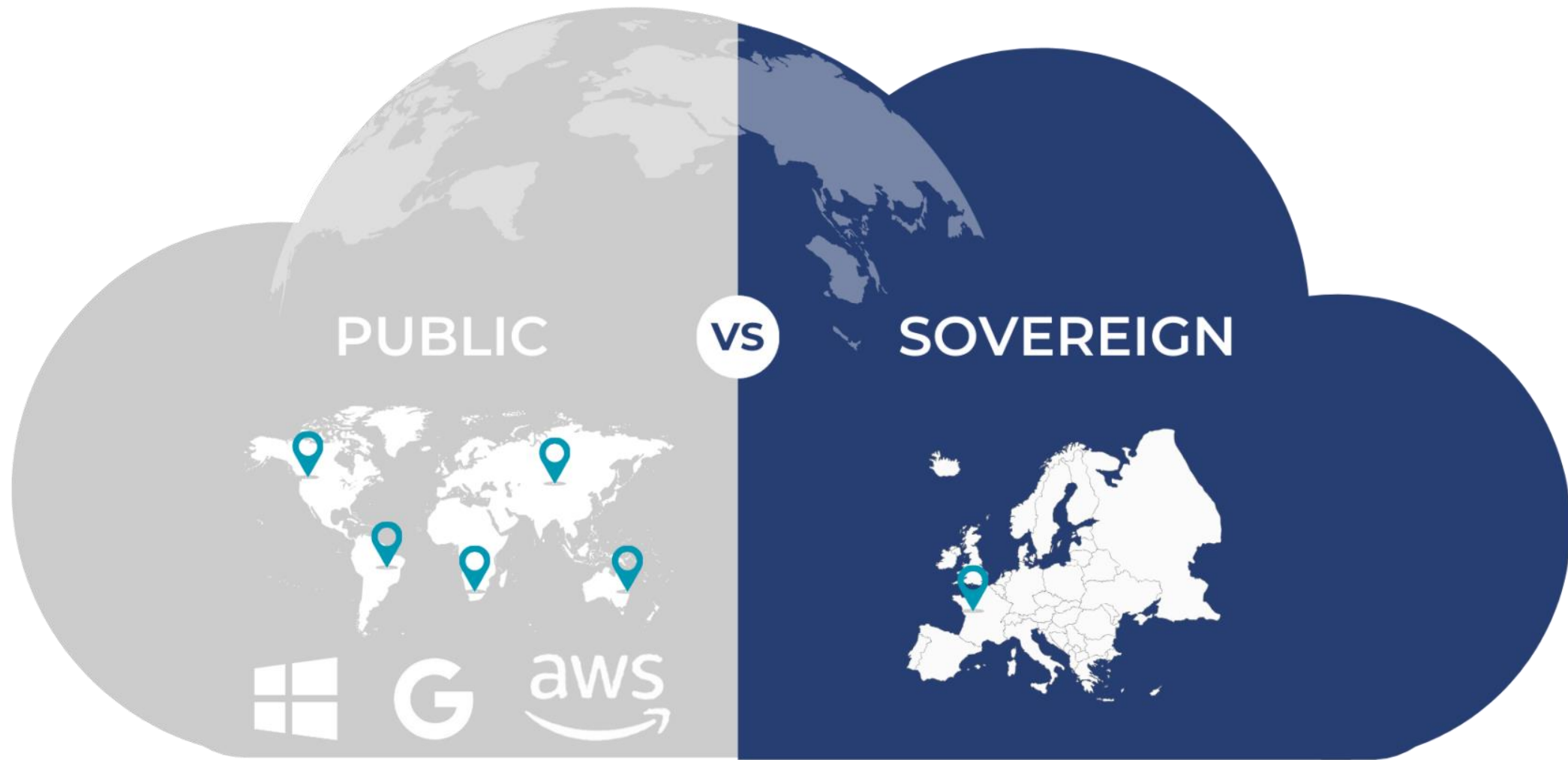
The open-source project has 4,000+ contributors, 30,000+ code contributions, 32,000+ GitHub stars.

Mattermost automates and accelerates sovereign, on-prem & classified workloads on mobile, web & desktop, including in air-gapped and DDIL environments in the US & globally.

Core use cases include mission operations on the tactical edge, mission partner environments, cyber defense, Enterprise DevSecOps, and self-sovereign collaboration.

What We'll Cover Today

1. Introduction to sovereign cloud & hyperscalers
2. Strategic drivers for the rise in digital sovereignty
3. Regional examples of major investments
4. Key trends & market forecast
5. Closing Q&A



Commercial & Sovereign Hyperscalers

What are hyperscalers?

Large cloud service providers that operate massive, globally distributed cloud infrastructure designed to scale rapidly and support millions of users and workloads simultaneously. Think of Azure, AWS, GCP, Oracle.

What are commercial hyperscalers?

General-purpose cloud services hosted by hyperscalers, with shared infrastructure, standardized SLAs, suitable for non-sensitive workloads.

What are sovereign hyperscalers?

Cloud infrastructure under national/local jurisdiction, with strict data residency, privacy, and compliance requirements with national laws. E.g. defense, intelligence, security & critical infrastructure enterprises.

"Why do we want to go to the cloud? Because you get better synthesized data. Sensors are going to be ubiquitous on the battlefield. They'll provide such masses of data that unaided human brains and traditional staff processes can't collect it all in one place, let alone make sense of it: It's got to be synchronized by tools such as artificial intelligence and cloud-based computing."



Lt. Gen Eric Wesley
Head of the Joint AI Center,
US Air Force

Commercial & Sovereign Hyperscalers

	Commercial Hyperscalers	Sovereign Hyperscalers
 Data Location	Global distribution; often outside the country of data origin	Localized; data resides strictly within national or regional boundaries
 Jurisdiction	Subject to foreign laws (e.g., U.S. CLOUD Act)	Governed by local/national data protection and privacy laws
 Use Cases	General-purpose workloads; scalable compute, analytics, SaaS	Sensitive workloads (defense, critical infra, intelligence, cyber security)
 Service Operators	Operated by U.S.-based or global tech companies	Operated by national telcos, state entities, or local partnerships
 SLAs & Control	Standardized, global SLAs; limited customer control	Customized SLAs with local compliance; greater customer oversight
 AI & LLM Hosting	Hosted on shared global infrastructure	Trained and served on isolated, local infrastructure
 Customer Segment	Enterprises, startups, global SaaS providers	Governments, defense agencies, critical infrastructure operators
 Example Providers	AWS, Microsoft Azure, Google Cloud Platform, Oracle Cloud Infrastructure	Oracle Sovereign Cloud, Google Distributed Cloud, evroc European Cloud

SOVEREIGN CLOUD

Interactive Poll #1

What's your top concern when adopting cloud for sensitive workloads?

1. National security risks
2. Compliance with local laws
3. Public trust and citizen data control
4. Vendor lock-in or exit risk

Take a moment to answer.



Global Change

Geopolitical Uncertainty



Unprecedented supply chain risk
from foreign regulations

Transition to Agentic World



AI innovation drives both
opportunity and redundancy

Transformation of Cyber Economics



Strategic realignment of legacy,
sovereign & global infrastructure

Geopolitical Uncertainty

Unprecedented supply chain
risk from foreign regulations



EU Digital Sovereignty

GEO-ECONOMICS AND POLITICS

What is digital sovereignty and how are countries approaching it?

Jan 10, 2025



- Digital sovereignty goes beyond technology and data regulation to include fostering entrepreneurship and funding innovation.
- But countries have different approaches around governance – and this has increased geopolitical competition between the US, China and the EU.
- As world leaders prepare to gather at the World Economic Forum Annual Meeting in Davos, here's a primer on digital sovereignty.

Back in March 2021, leaders of four European countries wrote a joint letter to European Commission President Ursula von der Leyen making proposals for the accelerated achievement of European 'digital sovereignty'.

GOVERNMENT & POLICY



European tech industry coalition calls for 'radical action' on digital sovereignty — starting with buying local

Natasha Lomas — 10:00 PM PDT · March 16, 2025

A broad coalition drawn from across the ranks of Europe's tech industry is calling for "radical action" from European Union lawmakers to shrink reliance on foreign-owned digital infrastructure and services to bolster the bloc's economic prospects, resilience, and security in increasingly fraught geopolitical times.

In an open letter to both European Commission President Ursula von der Leyen and the EU's digital chief, Henna Virkkunen, more than 80 signatories representing around 100 organizations said they want regional lawmakers to

EU Digital Sovereignty

★ 342 reads

AWS to Launch European Sovereign Cloud with €7.8B Investment by 2025

by Nihar Karra · June 11th, 2025

TCR



Built, operated, controlled, and secured in Europe: AWS unveils new sovereign controls and governance structure for the AWS European Sovereign Cloud

Written by About Amazon Team



Microsoft announces new European digital commitments

Apr 30, 2025 | Brad Smith - Vice Chair & President



Microsoft launches new European Security Program

Jun 4, 2025 | Brad Smith - Vice Chair & President



Press Release

Oracle EU Sovereign Cloud Helps Organizations Across Germany Securely Manage Critical Business Data

RDV, BGN, and Vertama among public and private organizations taking advantage of sovereign cloud capabilities to run their sensitive workloads entirely within the borders of the EU

Munich, Germany—May 14, 2025

Organizations across Germany are selecting Oracle EU Sovereign Cloud to help meet their data privacy and residency requirements. The latest examples of organizations in Germany that have selected Oracle EU Sovereign Cloud include Rinderdatenverbund (RDV), Europe's largest data network for cattle; Berufsgenossenschaft Nahrungsmittel und Gastgewerbe (BGN), an insurance association dedicated to workers in the food and hospitality industry; and Vertama, a healthcare technology provider. By migrating their critical business systems and services to Oracle EU Sovereign Cloud, these organizations can take advantage of flexible, secure, and high-performance cloud computing resources while helping ensure that their workloads are in compliance with EU guidelines and requirements for data sovereignty and privacy.



Part of Oracle Cloud Infrastructure's (OCI) distributed cloud portfolio, Oracle EU Sovereign Cloud enables public and private sector organizations in Germany and across the EU to place sensitive data and applications in the cloud in alignment with EU data privacy and sovereignty requirements. Oracle EU Sovereign Cloud regions are separated from other OCI commercial regions to ensure physical, logical, and cryptographic segregation. This enables Oracle to restrict support and operations to EU residents employed by EU legal entities – a unique capability that sets OCI's sovereign cloud apart from other hyperscalers. Oracle EU Sovereign Cloud gives customers access to the 150+ AI and cloud services available in OCI's public cloud regions with the same prices, support, and service level agreements (SLAs) on performance, management, and availability. Oracle Fusion Cloud Applications Suite is also available on Oracle EU Sovereign Cloud.

"With demand across the public sector and every industry in Germany, Oracle EU Sovereign Cloud is proving a popular choice for the deployment of EU-based cloud services," said Thorsten Herrmann, senior vice president and Germany country leader, Oracle. "With

Google reaffirms sovereign cloud solutions for EU

Aims to ease anxieties about trade tensions

May 22, 2025 By: Georgia Butler Have your say



Google has announced a series of additional security and sovereignty elements for its sovereign cloud in response to EU groups' concerns about trade tensions and the reliance on US tech companies.

First reported by the [Financial Times](#), and later detailed in a [blog post](#) from Google, the company is also looking to work more closely with its regional partners in France and Germany to help reassure customers that data will remain within country boundaries.

The move comes as European groups are raising concerns about the



Asia-Pacific (APAC) Digital Sovereignty

A Sovereign Cloud Boom Is Happening In APAC

Published August 23, 2024



The future could see sovereign cloud services becoming an essential part of integrated public- and private-sector cloud strategies.

In July 2024, the Australian government announced an AUD \$2 billion (US \$1.3 billion) investment into a strategic partnership between the Australian Signals Directorate and AWS in Australia to build a "Top Secret Cloud" for the government.

The sovereign cloud [will support Australia's defence and national intelligence agencies](#) to securely host their most sensitive information. It will also improve the secure sharing and analysis of classified data at speed and scale, and provide an environment where agencies can leverage emerging technologies, like artificial intelligence and machine learning, in their work.

This strategy exemplifies sovereign cloud growth in APAC, particularly in the public sector. An estimated [48% of agencies in APAC are planning to include cloud sovereignty](#) in their cloud strategy in the next 12 months, according to provider Capgemini.

The future may witness the proliferation of sovereign clouds, driven by cybersecurity concerns and data protection regulations that encourage more careful data management across national borders, as hyperscaler cloud providers invest in sovereign cloud services to meet this growing demand.

Sovereign clouds are rapidly growing in the APAC region

The demand for sovereign cloud solutions is rising rapidly in the APAC market.

Global spending on sovereign cloud solutions is expected to surpass \$250 billion by 2027, according to IDC.

17% of APAC governments already use sovereign clouds and one-third intend to adopt sovereign clouds by 2026, driven by concerns around cyberthreats, evolving data residency regulations, and data security.





Transition to Agentic World

AI innovation drives both
opportunity and redundancy

Stargate \$500B Investment into US AI Infrastructure

OpenAI, Oracle and SoftBank to invest \$500B in US AI infrastructure building project



BY MIKE WHEATLEY

New U.S. President Donald Trump appeared alongside officials from three top technology firms to announce the creation of a new initiative called the Stargate Project, which is tasked with building up artificial intelligence infrastructure in the country.

OpenAI Chief Executive Sam Altman, [SoftBank Group Corp.](#) CEO Masayoshi Son and [Oracle Corp.](#) Chairman Larry Ellison stood alongside Trump at the White House today to [announce](#) the creation of the new company. There, Trump declared it to be “the largest AI infrastructure project in history.”

To get the ball rolling, the three companies will invest an initial \$100 billion into the company, with plans to commit up to \$500 billion in the coming years. According to Trump, the project will help to create about 100,000 U.S. jobs.

Stargate will help to build the physical and virtual infrastructure required to “power the next generation of AI,” Trump added. According to Ellison, construction on the project’s first 1 million-square-foot data center is already underway in Texas.

AI industry leaders have long stressed the need for more data centers, as well as computer chips and energy resources, in order to support their growing ambitions in future years.

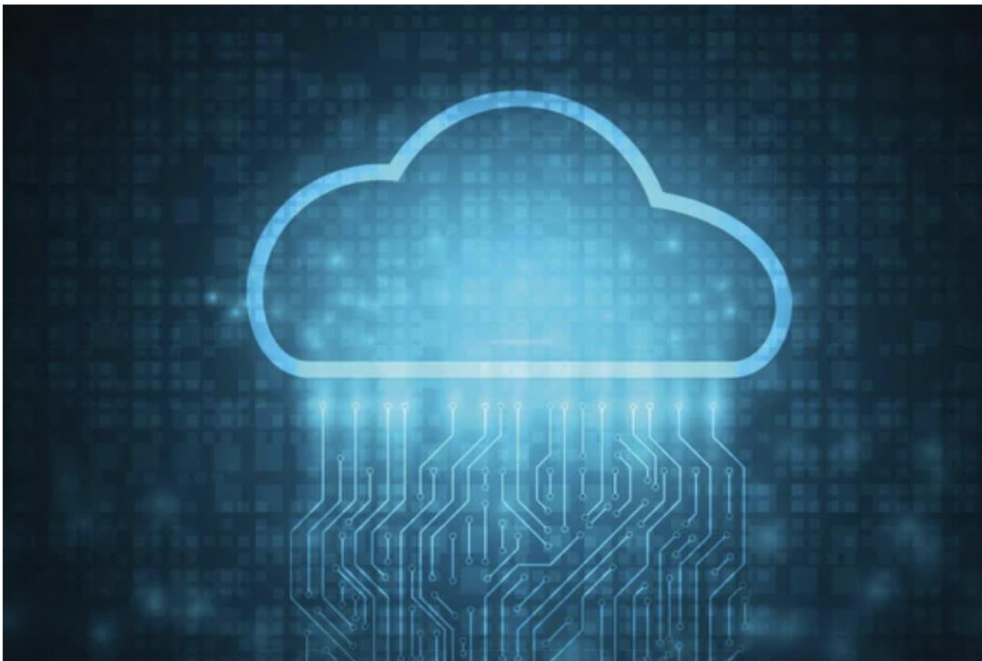
“As AI reshapes business, industry, and policy around the world, countries and organizations need to strengthen their digital sovereignty in order to protect their most valuable data.”



Safra Catz
CEO, Oracle

Gulf Coast (GCC) AI Sovereignty

Accenture, Google Cloud Partner on Sovereign Cloud and Gen AI in Saudi Arabia



Key Takeaways

- Accenture and Google Cloud are collaborating to enhance the adoption of cloud solutions and generative AI capabilities in Saudi Arabia, addressing local data sovereignty needs and establishing a modern digital core for organizations.
- The partnership aims to harness generative AI to create new business opportunities, enhance customer experience, and support workforce development through initiatives like hackathons and training

Microsoft and Core42 to build sovereign cloud and AI infrastructure for Abu Dhabi

Trio sign multi-year partnership

March 20, 2025 By: Georgia Butler [Have your say](#)



The Abu Dhabi government is partnering with Microsoft and Core42 for AI infrastructure and a sovereign cloud offering in the United Arab Emirates (UAE).

The multi-year agreement was signed by Ahmed Tamim Hisham Al Kuttab, chairman of the chairman of Abu Dhabi's Department of Government Enablement, Microsoft CEO Satya Nadella, and Peng Xiao, group CEO of G42, Core42's parent company.

Between them, they aim to establish a sovereign cloud computing environment capable of processing more than 11 million digital interactions daily between Abu Dhabi's government entities, citizens, and businesses.

Al Kuttab said: "Technology has the power to transform how governments interact with people, making services more efficient, intuitive, and impactful. This partnership is a critical milestone in our digital transformation. By combining Microsoft's cloud technologies, G42's AI expertise, and the Government's strategic vision, we are helping to enable a powerful platform that will redefine government services."

Nadella added: "AI will transform how governments operate and serve their citizens everywhere, and Abu Dhabi is leading the way. Through our partnership with the Department of Government Enablement – Abu Dhabi and G42, we are setting a standard for AI adoption in the public sector, as we help Abu Dhabi become the world's first AI-native government."



Telco-Tech Partnerships for AI





Transformation of Cyber Economics

Strategic realignment of
legacy, sovereign & global
infrastructure

Cyber attacks rapidly targeting critical infrastructure

Cyber Attack on UK Train Station WiFi Sparks Safety Concerns

12-11-2024 | By Robin Mitchell



German air traffic control agency confirms cyberattack. says operations unaffected

Deutsche Flugsicherung, the German state-owned air traffic control agency, has confirmed a cyberattack on its systems.

The nature of the attack is unclear. A press statement on Monday that the incident is affecting the agency's IT infrastructure.

"Whether and, if so, which data could be affected is still unclear."

Hackers target bank clients in Czechia, Hungary and Georgia in novel phishing campaign

Hackers set up malicious banking applications that were nearly identical to legitimate European ones in an effort to steal user data in an elaborate phishing campaign, according to new research.

The apps were installed on Android and iOS devices from third-party sources, bypassing traditional security measures that warn users about the apps. The apps, according to a new report from Slovakia-based CERT, were designed to steal user data.

The campaign, which began in November last year, was carried out by two threat actors who targeted "structurally different" infrastructures. However, researchers have not yet linked the attacks to specific hacker groups.

Finland's Top Power Utility Targeted With Daily Cyber Attacks

By Tsvetana Paraskova - Oct 10, 2024, 7:50 AM CDT



The Finnish power utility, which is being subjected to daily attacks by suspicious individuals and drone activity have been reported, Jauramo told Reuters.

The utility has not reported any cyberattack attempts, or cyber security breaches, but has reported sightings of drones and different kinds of suspicious activity.

NEWS > CYBERSECURITY AND DATA PROTECTION

Baltics brace for cyberattacks as they depart Russian electricity grid

A long-planned exit from the BRELL power grid has the Baltic countries preparing for Russian retaliation.

Free, France's second-largest telecoms company, confirms being hit by cyberattack

Free, the second-largest internet service provider in France, confirmed being hacked this weekend following the attempted sale of purportedly stolen customer information on a cybercrime forum.

The Paris-based company has issued a warning that personal data was compromised in the incident, has filed a criminal complaint with the country's

Cybersecurity Investments into Sovereignty

AWS partners with Germany to boost cybersecurity and digital sovereignty

🕒 Written by Finbarr Toesland Thu 27 Mar 2025



Image credit: Amazon

A new cooperation agreement has been signed by Amazon Web Services (AWS) and the Federal Office for Information Security (BSI) in Germany that seeks to advance the security of digital infrastructure, as well as developing cutting-edge technology.

This partnership is just one part of the major, long-term [commitment](#) AWS has made to both Germany and Europe as a whole.

A total of €7.8 billion (\$6.5 billion) is set to be invested by AWS in its European Sovereign Cloud by 2040, directly contributing to both new jobs and new economic opportunities. This is not the first time AWS and BSI have worked

“Cybersecurity is no longer just about defense. It's about sovereignty. The next decade will be defined by how nations, states, and enterprises reclaim control over their digital destiny.”



Ryan May
CISO, Florida DMS

Global Change

Geopolitical Uncertainty



Unprecedented supply chain risk
from foreign regulations

Transition to Agentic World



AI innovation drives both
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Transformation of Cyber Economics



Strategic realignment of legacy,
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KEY TRENDS

Interactive Poll #2

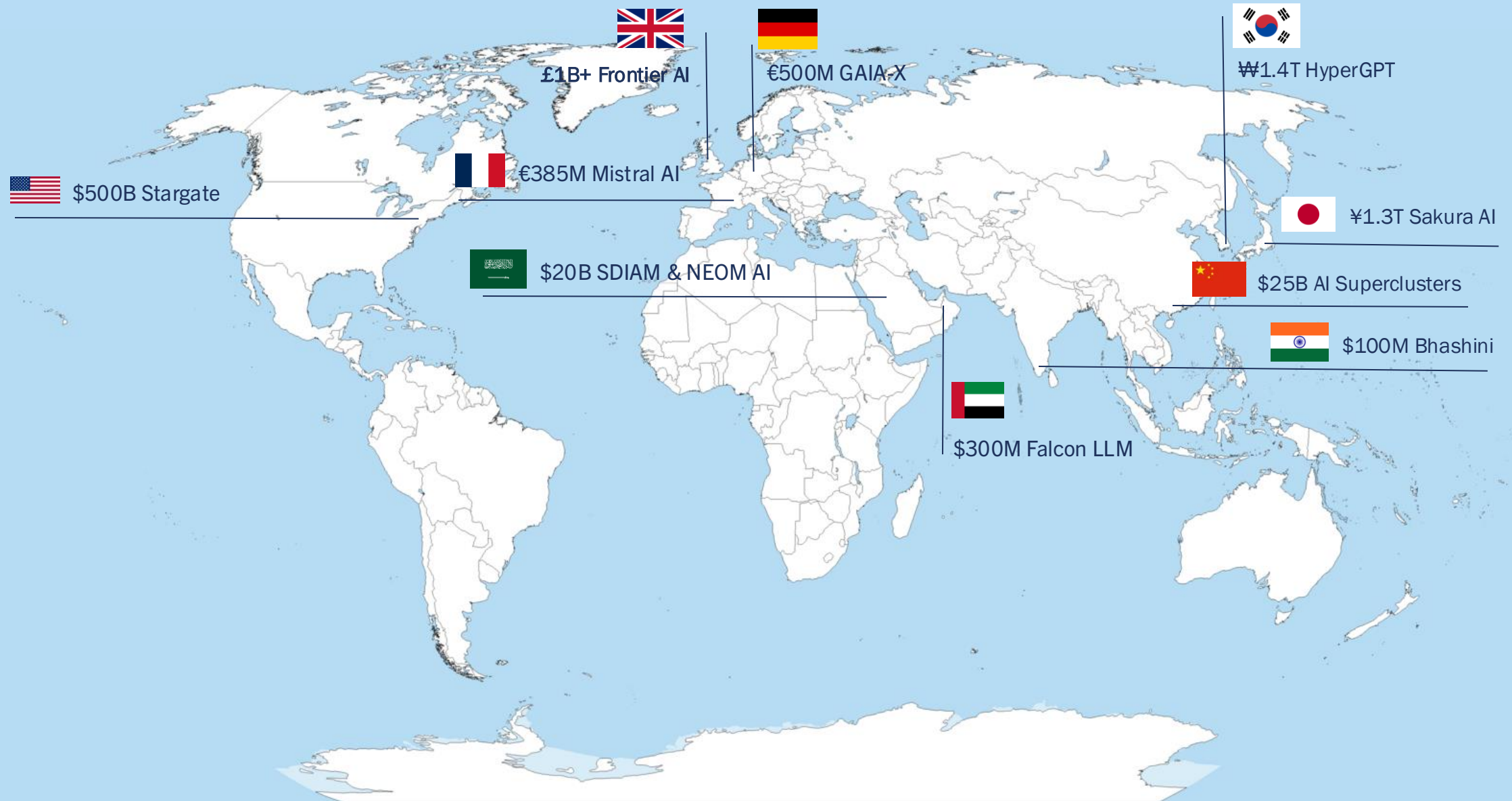
Which of the following trends will have the biggest impact on the industry in the next 3 years?

1. Regional Hyperscalers
2. Open Standards
3. Sovereign AI
4. Tactical Edge Deployments

Take a moment to answer.



Sovereign AI Accelerating Investment



Key Trends Shaping the Industry



Sovereign AI

AI must run on trusted, local infrastructure. Examples: (a) Stargate \$500 B investment into U.S.-based AI infra, (b) UAE's Falcon for sovereign LLMs trained on UAE infra, (c) France's Mistral AI with €385M for sovereign open-source AI models.



Regional Hyperscalers

Large Cloud providers launching regional, sovereign cloud zones. Key players include AWS, Microsoft, Google Cloud (Assured Workloads), Oracle Cloud (Sovereign Region), plus local hyperscalers such as Evroc, Hetzner, SITE, and more.



Tactical Edge

Edge sync and secure local compute are essential for resilient operations. Increased requirements to operate in disconnected or contested environments. Examples include submarines, embassies, conflict zones.



Open Standards

Open standards enable transparency, autonomy, and freedom from vendor lock-in. Example includes Gaia-X, driven by EU governments (Germany, France) directly address public trust through transparency and data sovereignty.



5x Growth in Sovereign Cloud Market by 2032

The global sovereign cloud market is projected to grow from 154.69 billion in 2025 to 823.91 billion (USD) by 2032.

Source:

<https://www.fortunebusinessinsights.com/sovereign-cloud-market-112386>

The Mission Stack Must Evolve

	Custom-Built Proprietary One-off systems implemented on time and materials basis	Commercial System Repurposed civilian software with competing priorities	Purpose-Built Open Platform Infrastructure for effective, interoperable mission operations
Focus Built for mission critical operations today, and our journey to an agentic future	✓ Yes	✗ No	✓ Yes
Adaptability Meets evolving mission, interoperability, and agentic needs	✗ No	✗ No	✓ Yes
Security Designed for sovereign cloud, air-gapped, and zero-trust operations	✓ Yes	✗ No	✓ Yes
Resilience Deploys in private, geo-distributed, scalable sovereign architecture	✗ No	✗ No	✓ Yes

Mattermost: The Intelligent Mission Environment

Self-hosted, AI-powered collaborative workflow for defense, intelligence, security and critical infrastructure enterprises

USE CASES

Cyber Defense

SOC/CERT ops, out-of-band incident response, Red Team

DevSecOps

Dev productivity, CI/CD, platform eng, emergency comms

Mission Operations

Critical workflow, Zero Trust, C2 to tactical edge, joint ops

APPLICATION

Secure Collaborative Workflow

Messaging collaboration across web, desktop and mobile with file sharing, audio/screenshot, workflow automation, issue tracking, bots, agents and open API access integrating into modern tool chains and legacy systems with advanced customization and security controls



Messaging Collaboration

Mattermost Channels for ChatOps and automation



Workflow Automation

Mattermost Playbooks for automating SOPs



Audio & Screenshot

Mattermost Calls for real-time calling & screenshot



Project Tracking

Mattermost Boards for Kanban & work management



AI Agents & Open APIs

Mattermost Agents, AI assistance & integration

Desktop, web, mobile & Microsoft Teams user experiences



Extensible open-source architecture



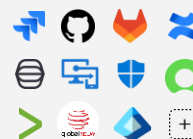
INTEGRATION

Integration & AI Platform

Operational extensibility with pre-packaged, source available connectors, automations and templates for rapid and effective systems integration

Layered Extensibility

Pre-packaged & Custom Integrations
Webhooks & Slash Commands
Plugin Architecture



Video Meeting Integrations



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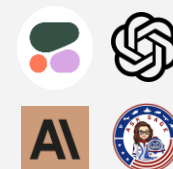


webex



Multi-Agent/Multi-LLM integration

Sovereign AI model support via OpenAI APIs
Custom Instructions, RAG, Semantic Search
Responsible AI control plane
MCP & Agent-to-Agent Architecture



DEPLOYMENT

Sovereign, Cyber-Resilient Deployment

Kubernetes-based orchestration on private, gov & air gapped clouds. Scales from tactical edge to strategic core with geo-distributed ultra-high availability.

Tactical Edge to Strategic Core

Runs Edge, Data Center, Sovereign & Global Hyperscaler

Tactical Edge

Local Datacenter



ORACLE

aws



Mission-Ready Security & Resilience

Excels in classified, air-gapped & DDIL operations
Defense-grade controls, monitoring & mobile security
Scales to 200K+ users



USAF Enhances Strategic Capabilities and Optimizes Resource Use with Mattermost for Intelligence & Planning

Air Mobility Command provides airlift, air refueling, and global air mobility support, allowing the capability to deploy U.S. Armed Forces anywhere in the world within hours.

Challenge: Globally distributed flight crews, often in remote locations or with limited connectivity, struggle to securely and effectively provide up-to-date flight information, putting mission success at risk. Conduct Maximum Endurance Operation (MEO) for KC-46A in first nonstop flight around the world, refueling across global theaters.

Impact:

- Elevated mission intelligence to “Decision Quality” information for flight crews and AOPS for improved coordination with allies and partners
- Enhanced mission success with extended flight plan access
- First successful MEO nonstop KC-46A flight in only 45 hours
- Improved resource management and safety
- Protects AMC six (6) golden hours to keep missions executable and mitigate 18 hour reset if they bust “ready windows”

“For us, using Mattermost offers a **huge benefit in mission velocity and safety.**

We found that also gave us a lot more time to fix cargo and fuel problems before the crew even shows up at the airplane.”



Maj. Justin Poole
Phoenix Spark Innovation Cell
Director, Travis Air Force Base

Open Q&A

Reach out for more on sovereign cloud

jason@mattermost.com | <https://www.linkedin.com/in/jason-blais/>