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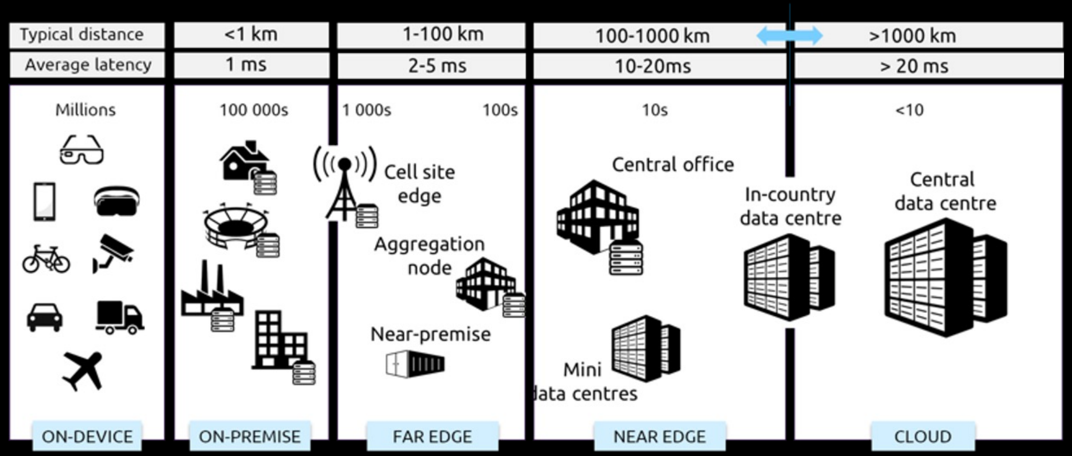
The European Cloud
Alternative

The European Strategy

01 Data Federations (Industrial Dataspaces)

The European Data Strategy first pillar focuses on creating **industry data spaces** to facilitate companies' access to distributed high- quality data across the value chains, respectful of European values and with defined access and usage rules

02 Cloud Federations (Interoperable Aggregates)



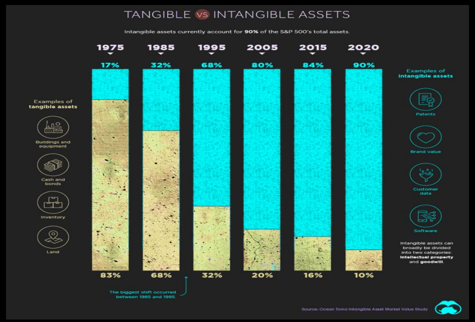
The second pillar of the European Data Strategy addresses **data gravity and availability** across the cloud-to-edge continuum. The increasing volume and importance of data, coupled with the need to process data close to its point of generation and use, necessitates the development of an enabling distributed and **federated cloud infrastructure.**

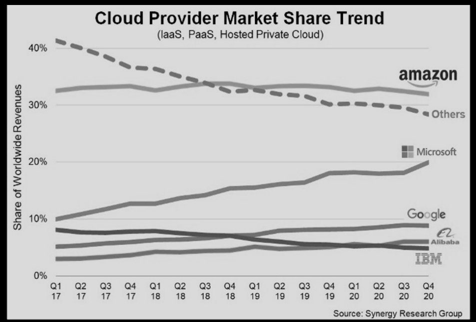
But, where do we stand?

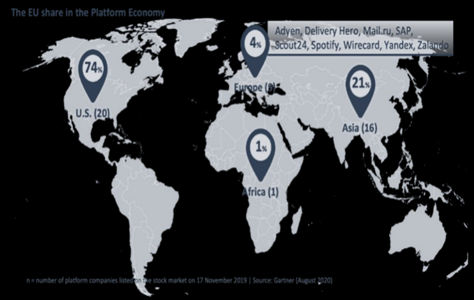
+150BEur Allotted & Halfway Through the Digital Decade Program: Still Europe is heavily lagging behind

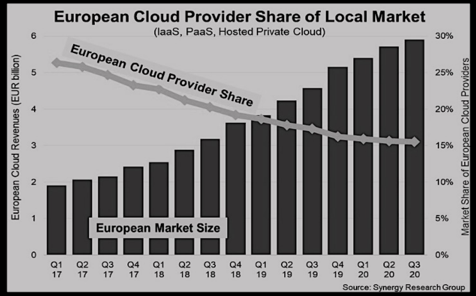
Data Economy Growth

- **90%** or Real Economy is Intangible (S&P500)
- **1TEur** EU Data Economy in 2030
- **x3** EU Cloud market growth in 3 years
- **+70%** of Cloud market in 3 companies









Europe Lagging Behind

- **+350** Rules in +10 Acts of EU Regulation
- **10%** of Collective Marketshare by EU CSP
- **+90%** of Shared Data out of EU (jurisdiction)
- **<30%** Ave. Cloud Uptake by EU Enterprises

And, what are today's alternatives*

01 Hyperscalers

Gaps in **Digital Sovereignty** and **Proximity** + **Lock in** and **Hyper-centralization**

Strengths

- Capacity
- Scalability
- Offering
- Network of Partners
- Innovation

Weaknesses

- Controllability
- Client Proximity
- Centralization
- Jurisdiction
- Closed systems

02 Individual EU CSPs

Gaps in **Critical Mass** and Service **Portfolio** depth and maturity

Strengths

- Controllability
- Client Proximity
- Distribution
- Jurisdiction
- Open Standards

Weaknesses

- Capacity
- Scalability
- Offering
- Network of Partners
- Innovation

03 European Projects

Gaps in **Concrete Commercial** Offering

Strengths

- Compliance Enforcement
- Consortia Aggregation
- Advocacy and Awareness
- Blueprints and Standards
- Fundings Availability

Weaknesses

- Standards and R&I Focus
- No Commercial Impact
- Conflicting Interests
- Open to non-EU influence
- Disjoint and overlapped Initiatives

*Logos are provided as examples and do not represent an exhaustive list of alternatives.

Dynamo: A Cloud Virtual Service Provider

The first real **commercial federation** across **European only** Cloud and Digital Service Providers

Implementing the new concept of a **CVSP (Cloud Virtual Service Provider)**

Building the **critical mass** and federation necessary to compete and enable **European Sovereignity** and **Innovation**

A true Marketplace, not just a catalog of browsable objects

Virtually **centralizing onboarding, qualification, billing and provisioning** of de-centralized resources

Alike the virtual merger into a single new legal entity of as many European operators

Dynamo: a European B2B Intermediary

Not competing, but enhancing and expanding the range of services offered by individual participants

Automating the E2E process, relying on standard APIs developed by the most important European CSPs

For EU providers only as a guarantee to Digital Sovereignity

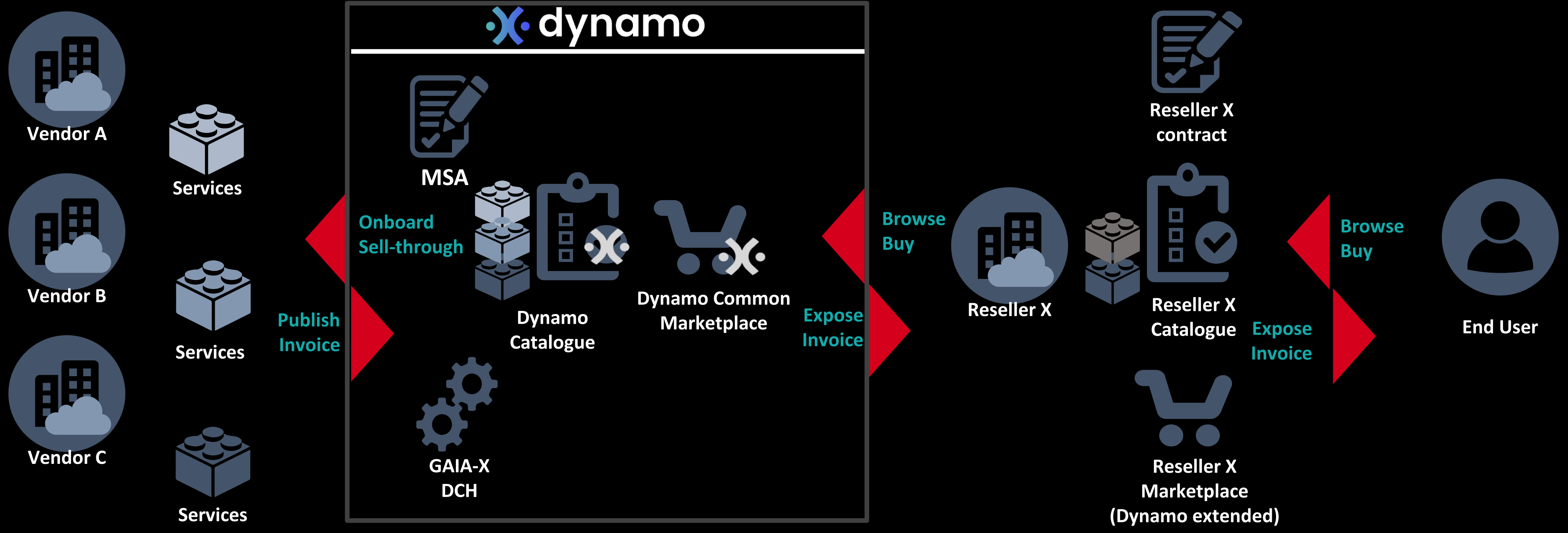
A **B2B Providers** intermediary, not selling to their customers

From onboarding and verification through **Gaia-X compliance**, to provisioning, billing and invoicing

Setting its **own participation rules** as a private legal entiry, to protect EU participant's interest

Dynamo Aggregates and Preserves Proximity and Autonomy

1 OnBoarding flow and Catalogue configuration



Each **Participant Vendor**:

- signs the Master Service Agreement
- Automatically onboarded through the Onboarding Engine
- publishe the services on the Dynamo Marketplace
- Qualify through the Dynamo Trust Engine (GAIA-X Digital Clearing House based)

Each **Participant Reseller** :

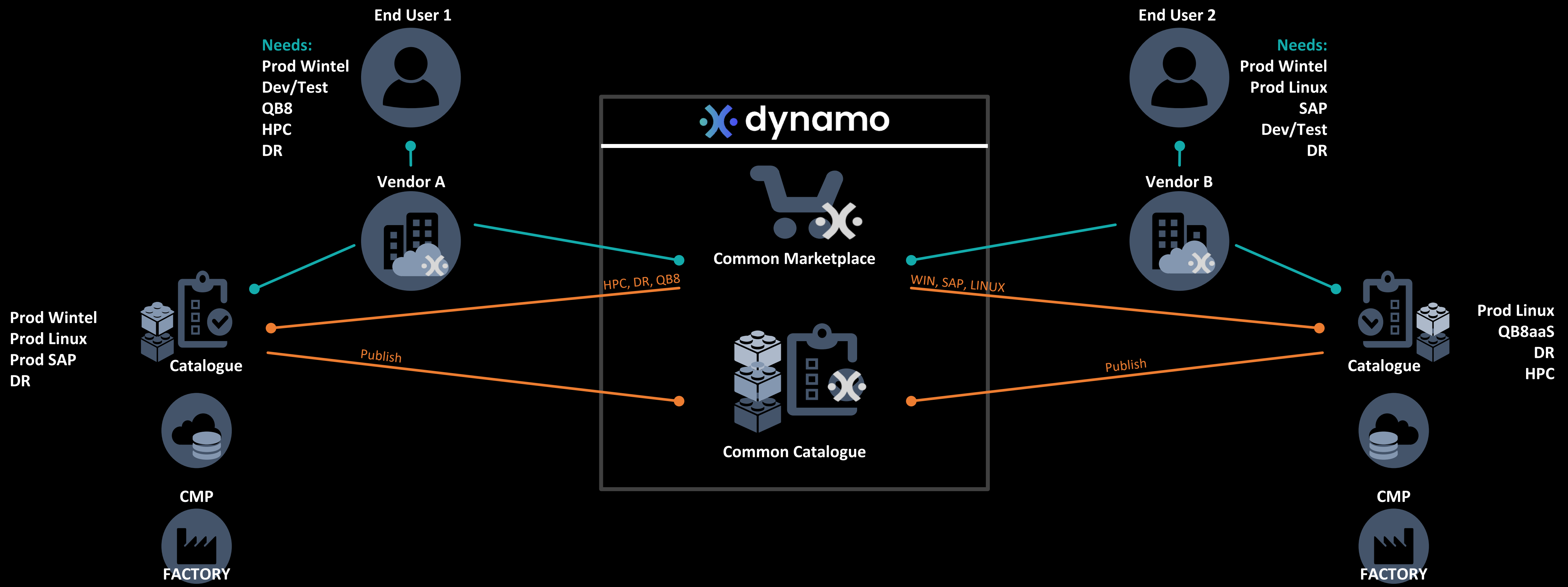
- Created its own instance of the Dynamo Marketplace selecting services to resell
- Combines multiple offerings from multiple providers
- Retain direct control of its end-customer

The **End User**

- Seamlessly buy through the reseller Marketplace "Powered by Dynamo“
- Retain and reinforce its relations through the preferred Dynamo Reseller
- Exploit enhanced and extended Reseller’s offering

How – Compensate Each Other's Limitations

2 Enrichment Use Case



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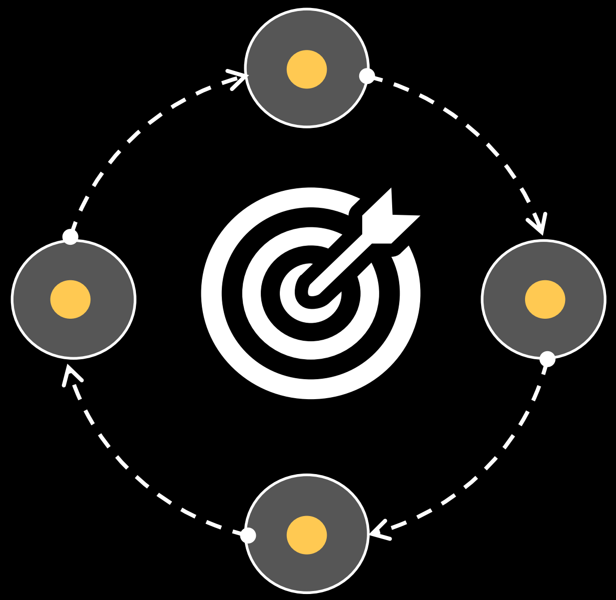
How Dynamo can support the new priorities for European CSPs

Credibility and Visibility

Ability to reach the **critical mass**
Maintain and expand the **customer proximity**
Leverage the **ecosystem's visibility**



Enrich Offering

Expanded portfolio – from IAAS to AI
Expanded **capacity** and redundancy
Fully **compliant Digital Sovreignity** solutions
For providers of **Innovation Services** , access to compliant European data sets and **computing resources** for training AI models and running **HPC workloads**

Reach New Markets

Capture the unanswered market demand for Digital Sovereign Cloud solutions
Exploit the new sales channel and expand to new geographies
Enable participation to larger deals

Innovation & Compliance

Increased **resilience** of value chain
Trusted supply chains & reduced **geopolitical risks**
Strenghten partners **collaboration**
Certify that Applications, AI and HPC solutions respect **European ethical principles and data sovreignity**

Dynamo Participation Rules

EU PRESENCE
Participants must have their headquarter in an EU Member State.

EU PROVISIONING
provisioning of services from utilities within the EU Member States.

EU CONTROL
Majority shareholders from EU or otherwise full control by the EU headquarter legal entity.

EU PERSONNEL
available option to provide operations and professional services through European citizens.

OBJECTIVE TRUST
Verified against the Dynamo trust engine (Gaia-X based).

ASSET OWNERSHIP
Direct provisioning of services or full control and transparency over the supply-chain.

SERVICE MODEL
Offering of products, components, or solutions in a XaaS (as a Service) model.

SERVICE TYPE
Including but not limited to CSP, ISV, MSP, Telco providers, Data providers.

FAIR PRICING
Offer channel re-sell pricing equal or lower than standard pricelist.

PRICE SCHEME
Describe pricing according to a common transparency scheme defined by Dynamo.

SERVICE UPDATES
Commitment to adapt service to Dynamo platform updates.

RE-SELL AGREEMENT
Sign-off of an intermediation and reseller agreement with Dynamo.

NON-COMPETE – DYNAMO
non-compete with DYNAMO in re-selling services.

NON-COMPETE – PARTNERS
non-compete with participants re-selling own services.

WHITE LABELLING
available option to offer services in white labelling.

COMMUNICATION
Support Dynamo and the Dynamo Platform in private and public communications.

CONTRIBUTION
All participants are invited to contribute to the evolution of Dynamo and its Platform.

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How Dynamo stands respect to other EU projects

	Key Focus	Common Federated CloudSpaces		Common Federated DataSpaces		Dataspace Middleware	Cloud Infrastructure Services	Standards / Methodology		
	Initiative	**DYNAMO**	**DOME**	**DEP**	**CATENA-X**	**SIMPL**	**IPCEI-CIS**	**DSSC**	**GAIA-X**	**CISPE**
	Nature	Commercial Company	EU Funded Project	EU Funded Project	Commercial Company	EU Funded Project	EU Funded Project	EU Funded Project	Foundation	NPO Trade Association
Partecipation	Open to all		✓	✓	✓	✓	✓	✓	✓	
	Open to Providers and Users		✓	✓		✓		✓	✓	
	Restricted to Providers	✓								✓
	Restricted to EU Providers	✓								
Deliverables	Common Standards / Blueprint	✓						✓	✓	✓
	Dataspace Services	✓		✓	✓	✓	✓			
	Cloud Services	✓					✓			
	Cloud Platform	✓								
	Common Catalog	✓	✓		✓					
	Common Marketplace	✓	✓							
Compliance	Participants Qualification	✓			✓					
	Contractual Verification	✓								
	Gaia-X Compliance Verification	✓			✓				✓	
	EU Reg. Compliance Verification	✓								

Dynamo Enables Shift to NextGen Cloud Services

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Compute2Data
Vs
Data2Compute

Cloud Federation
Vs
Isolation

Interoperability
Vs
Lock-in

Trust Focus
Vs
Regulation

Open API
Vs
Proprietary

Users Benefits

Reliability, Resilience, Security, Sovereignty, Switch-ability, Revers-ability, Cloud2Edge, Cost Reduction, Lock-in Risk Reduction, Compliance Cost Reduction, Procurement Cost Reduction, Partner Selection Cost Reduction, Cloud Migration Acceleration, Legacy Conversion Mitigation, …

Distribution
Vs
Centralization

Reg-Tech
Vs
Tech-Reg

Data Swarm
Vs
Concentration

Network Abstraction
Vs
Dedicated

FOSS
Vs
Licensed Products

Service Composition
Vs
System Integration

Liquid Infrastructures
Vs
Dedicated

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Dynamo's Participants Target (examples)

1 IAAS Providers

aruba.it, IONOS, OVHcloud, leaseweb, OUTSCALE, HETZNER, gigas, NumSpot (Cloud. Européen. Citoyen.), tietoevry, UpCloud, CloudFerro, STACKIT, elmec, eolo, plusserver, RETELIT, STRATO, progesi (gruppo BV TECH), Open Nebula, gridscale, geko cloud (A Claranet Group Company), Scaleway, deda.cloud (your safe IT), Public Cloud Group, sfera, ERGONET (evolutionary hosting), elastx, EUCA CLOUD, Hosting Solution, SHELLRENT, JOTELULU, IRIDEOS, clever cloud, varian

2 PAAS Providers

mendix, platform.sh, contentful, outsystems, strapi, Prisma, RapidCompact, aiven, codemagic, NUXEO, meilisearch

3 SAAS Providers

DASSAULT SYSTEMES, F-Secure, TeamViewer, wandelbots, ELEMENTO (MODULAR CLOUD), ZUCCHETTI, Wolters Kluwer, Bitdefender, Teamleader, odoo, Nextcloud, factorial

4 Innovation Services Providers

MISTRAL AI_, iGenius, DeepL, ALEPH ALPHA, SILO AI, yseop, algolia, MERANTIX, SINEQUA, AIMOTIVE

TOGETHER WE STAND, DIVIDED WE FALL

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Join and Support Dynamo!

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