

Sovereign AI Infrastructure Partners

Comparative Overview



THALES

AIRBUS



orange™



SIEMENS



Atos

CGI



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Company	Turnover	Employees	CEO / Chair	Description	Relevance to BlackVault™ / CV:M
Telefónica S.A.	€41.3bn (2024)	~102,000	Marc Murtra Millà (Chair & CEO, Jan 2025)	Spain's national telecom champion and European sovereign infrastructure giant. Operates across Spain, UK, Germany, Brazil and Latin America. Its tech arm, Telefónica Tech, is a fast-growing €2bn cybersecurity and cloud business.	Primary target. Spanish sovereign infrastructure anchor with explicit AI ambitions. Murtra is a government-aligned appointment with a mandate for European digital sovereignty — directly aligned with BlackVault's zero-transmission architecture.
Indra Group (incl. Minsait)	€4.84bn (2024)	~60,000	José Vicente de los Mozos (CEO) Ángel Escribano Ruiz (Exec. Chair)	Spain's leading defence, air traffic, space and IT services group. Minsait is its digital transformation and cybersecurity arm, serving governments and critical infrastructure across 46 countries.	Highest-alignment Spanish defence-tech player. Minsait already operates sovereign data and AI platforms for Spanish public sector. Zero-transmission memory infrastructure directly complements its regulated-sector client base. SEPI (Spanish state) is major shareholder — governance alignment strong.
Thales Group	€20.6bn (2024)	~83,000	Patrice Caine (Chair & CEO)	French defence, aerospace, cybersecurity and digital identity giant. World leader in defence-grade encryption, secure communications and digital sovereignty platforms. Strong presence across EU critical infrastructure.	Europe's pre-eminent defence-grade sovereignty partner. Its Digital Identity & Security division (formerly Gemalto) is the natural home for BlackVault's auditability and zero-transmission principles. Caine is on the Alliance Honorary President list — direct credibility bridge.
Airbus	€69.2bn (2024)	~150,000	Guillaume Faury (CEO)	Europe's aerospace and defence leader. Beyond aircraft, Airbus runs Airbus Defence & Space and Airbus CyberSecurity — a dedicated sovereign secure communications and critical infrastructure protection division.	Airbus CyberSecurity provides secure data architecture to governments across Europe. Its mandate to protect classified and sensitive data at scale maps directly onto BlackVault's governed-memory model. EU procurement relationships provide institutional credibility for an AI-governance pitch.
Deutsche Telekom (T-Systems)	€116bn group (T-Systems ~€4.5bn)	~240,000 group (T-Systems ~28,000)	Tim Höttges (Group CEO) Dr Ferri Abolhassan (T-Systems CEO)	Germany's national telecom operator. T-Systems is its sovereign enterprise IT and cloud services arm, providing secure digital infrastructure to German government, healthcare and critical industry clients.	T-Systems is the definitive German sovereign cloud and AI infrastructure partner. Its public-sector client base and 'sovereign cloud' positioning under EU GAIA-X align precisely with BlackVault. Claudia Nemat (Deutsche Telekom board until end 2025) is on the ecosystem list — a direct institutional bridge.

Orange (Orange Business)	€39.7bn group (2024)	~136,000	Christel Heydemann (Group CEO)	France's national telecom operator. Orange Business is its enterprise arm offering cybersecurity, secure connectivity and managed services. Leading French cyber revenues in the EMEA IT services market.	French sovereign digital infrastructure operator with the fastest-growing enterprise cyber business in France. Its regulated public-sector relationships and GDPR-native architecture make it a natural distribution partner for BlackVault in the French enterprise market.
OVHcloud	€974m (FY2024)	~2,700	Octava Klaba (CEO)	Europe's largest independent cloud provider, headquartered in Roubaix, France. Born-in-Europe infrastructure with no US hyperscaler dependency. Active participant in GAIA-X and EU sovereign cloud initiatives.	The only European cloud provider of scale not subject to US CLOUD Act jurisdiction. OVHcloud's sovereign-by-design infrastructure is the natural hosting environment for BlackVault's zero-transmission architecture. Smaller scale means faster commercial decision-making than larger telcos.
Siemens AG	€75.9bn (FY2024)	~312,000	Roland Busch (President & CEO)	German industrial and technology conglomerate. Siemens Digital Industries leads industrial AI and secure automation. Siemens Energy and Siemens Healthineers extend the group into critical infrastructure sectors.	Industrial AI memory governance is an emerging gap — Siemens manages vast sensitive operational data across regulated sectors (energy, healthcare, manufacturing). BlackVault's enterprise-grade governed memory maps onto its need for auditable AI in safety-critical environments.
Capgemini	€22.1bn (2024)	~340,000	Aiman Ezzat (CEO)	Franco-British IT services and consulting giant. Among Europe's largest systems integrators, with a strong European government and defence client base. Leads on cloud, AI and digital transformation for regulated industries.	As a leading EU systems integrator for sovereign clients, Capgemini is the natural channel partner to bring BlackVault into major European government and enterprise AI deployments. Its French heritage and EU regulatory expertise align with the AI Act compliance positioning.
SAP SE	€17.0bn cloud+software (€34.3bn total 2024)	~107,000	Christian Klein (CEO)	Germany's enterprise software giant. The world's largest ERP provider, serving the majority of Fortune 500 companies. SAP Business AI is its AI integration layer embedded across enterprise operations globally.	SAP's AI memory challenge is acute: enterprise AI agents require governed, auditable memory to operate inside regulated SAP environments. BlackVault as a memory middleware layer inside SAP Business AI is a compelling and immediately legible proposition for SAP's enterprise clients.
CGI Inc.	C\$14.7bn (~€10bn) (FY2024)	~91,000	George D. Schindler (President & CEO)	Canada-founded but deeply European IT and business consulting firm, with major operations in France, UK, Germany, Scandinavia and Benelux. Strong public-sector and defence portfolio across NATO member states.	CGI's European government and defence client base (including classified environments) creates direct demand for governed AI memory. Its decentralised operating model means regional technical leads can advance discussions independently — making middle-management outreach particularly effective.

IBM (Europe)	\$62.8bn global (2024)	~288,000	Arvind Krishna (Chairman & CEO)	US-headquartered but with major European sovereign-infrastructure presence through IBM Consulting and IBM Technology. Watson AI and IBM Cloud for Government serve regulated public-sector clients across the EU.	IBM's governance credentials (OpenPages, AI FactSheets, Responsible AI) make it sympathetic to BlackVault's proposition. However, US ownership and CLOUD Act exposure is a structural tension — this makes IBM better as a channel validator than a primary acquisition partner.
Bosch Group	€91.0bn (2024)	~429,000	Stefan Hartung (Chair, Board of Management)	German industrial technology giant spanning automotive, smart home, industrial and energy sectors. Bosch Digital Solutions and Bosch Research are expanding into industrial AI and IoT data platforms.	Notable: Bosch R&D researcher Mihai Ciprian Chezan independently published work under the identical 'Constitutional Memory' name with aligned architecture — a validated third-party signal. Bosch's industrial AI data governance gap maps directly onto BlackVault. Prior Bosch contact exists.
Atos / Eviden	~€9.8bn (2024, post-restructuring)	~82,000 (post-restructuring)	Phillippe Salle (Chairman) Paul Saleh (CEO, Atos SE) Philippe Oliva (CEO, Eviden)	French IT services group, now restructured into Atos (IT infrastructure) and Eviden (digital, security and advanced computing). Eviden operates Europe's most powerful supercomputing infrastructure and leads on sovereign AI and cybersecurity.	Eviden's Sovereign AI initiative and BullSequana supercomputing platform are directly adjacent to BlackVault's positioning. Despite financial turbulence, Eviden retains unmatched EU government cybersecurity relationships. Restructuring may create acquisition appetite for validated IP.
Sopra Steria	€5.8bn (2024)	~50,000	Pierre Pasquier (Chairman)	Franco-European IT consulting and systems integration firm with deep public-sector roots across France, UK, Germany and Scandinavia. Fastest-growing top-10 European IT services firm in 2024. Strong in defence, aerospace and regulated government sectors.	Sopra Steria's public-sector client concentration and European-only sovereignty credentials make it a credible and accessible early partner. Smaller scale than Capgemini means senior technical engagement is achievable faster. UK operations create an additional pathway via Jamie and Matthew's BBC/ITV networks.
Accenture (Europe/Public Sector)	\$65.2bn global (FY2024)	~774,000	Julie Sweet (Chair & CEO)	Global consulting and technology services leader. Accenture's European public-sector and defence practice is among the largest, serving EU institutions, defence ministries and regulated industries with AI, cloud and digital transformation.	As the dominant EU public-sector consulting partner, Accenture has unmatched access to the decision-makers who will mandate AI governance infrastructure. More relevant as a commercial channel or endorser than as an acquirer — US HQ and scale make direct IP acquisition less likely.

Sources: Company annual reports and official filings (2024). Employee figures are approximate. All financial data in EUR unless noted. Relevance assessments reflect Constitutional Memory S.A. internal analysis only.