


OBSERVATORY

# SecNumCloud

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EDITORIAL SecNumCloud



# A European sovereign cloud market: the key to a diversified and scalable market

**Elise Torché**
*Analyst at Forvis Mazars in the UK, and member of the SecNumCloud Observatory*

*Several Member States have developed their own standards for access to critical markets, in coherence with their national priorities in defence and security. This apparent diversity of national frameworks must not conceal a common reality: the rising level of requirements in cybersecurity and sovereignty is a condition for market access, for both public and private actors. Beyond the emergence of national regulatory frameworks, market dynamics reveal the appearance of a genuine European potential for sovereign cloud offerings.*

*The absence of a European regulatory framework has not left a vacuum; many States have structured, through their national frameworks, criteria for access to this market, according to sometimes differentiated logics. Germany, with the C5 framework, favours an approach based on transparency and audit, leaving the market and clients responsible for evaluation. Italy, for its part, adopts a hybrid path, structured around data sensitivity and targeted state control. Other States such as Estonia or the Czech Republic are more aligned with cross-cutting security baseline logics than with a dedicated cloud certification. France has chosen a demanding model, structured around a state qualification including legal risk alongside technological risk. SecNumCloud is no longer a French exception: it is one of the expressions of a broader European movement structuring the ZeroTrustMarket, the European market for critical infrastructures.*

*These approaches are not contradictory, and placing them in direct opposition would be an error of analysis. They reflect two structuring visions of trusted cloud in Europe: on the one hand, a centralised and prescriptive governance carried by the State and, on the other, assurance mechanisms based on audit and transparency.*

*The multiplication of labels and certification frameworks must not suggest that there is a difference in the level of security between Member States. Indeed, these national frameworks converge towards a common level of cybersecurity requirements, often more demanding than international standards.*

*With the emergence of national frameworks, the recent initiative of the European Commission marks an important shift towards a Europeanisation of the market. The call for tenders launched in autumn 2025, whose results were unveiled in April, does not merely finance cloud capacities: it introduces a genuine European scale of sovereignty, structured in levels of assurance. This mechanism, still embryonic, reflects a clear will of the Commission to extend the operational definition of digital sovereignty to a European scale. Among the actors selected by Brussels, we find key candidates of national cloud ecosystems, demonstrating that national dynamics are not siloed but progressively feed an interconnected ecosystem for a Europeanised market. This observation reflects above all an operational, market reality, rather than a construction stemming from a common political framework. This market dynamic could nevertheless justify the relaunch of discussions at the European political level, in order to support national initiatives and strengthen the resilience of the emerging European market.*

*This development is far from negligible as it enshrines the birth of the Digital ZeroTrustMarket in Europe. We are not facing harmonisation but a structured aggregation of national standards producing a European market. However, the uneven level of maturity between Member States still leaves doubts regarding the investments to be made. It is therefore possible, and desirable, that the models already in place can be taken up, as they already express the necessary diversity of an indispensable Union.*

# SecNumCloud
## *What's Up?*



The European Commission
has announced the winners
of the sovereign cloud call for tenders
launched in autumn 2025.
Among them are three major players from
the SecNumCloud ecosystem:

OVHcloud

in alliance
with Post Telecom
and CleverCloud

Scaleway

S3NS

in partnership
with Proximus, Clarence
and Mistral

The call for tenders covers the provision of cloud services for EU institutions, bodies and agencies, with a maximum value of €180 million over a six-year period. The selected providers were chosen based on their alignment with the European Commission's cloud sovereignty framework.

**Two candidates are progressing in their SecNumCloud qualification:**

Tenexa

ITS Integra

have obtained

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