

Sovereign Cloud in Europe — Market Reality, Winners and Baltic Position

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European Sovereign Cloud – Procurement Evidence and the Infrastructure Opportunity 2026–2029

Executive Summary

Verdict: Yes, sovereign-cloud procurement is becoming a structural demand driver for European data-center (DC) infrastructure through 2029.

Strongest Evidence Points:

1. **EUR 180M EU Cloud III Framework Awards:** The European Commission awarded EUR 180 million to Post Telecom, STACKIT, Scaleway, and Proximus in April 2026 for sovereign cloud services over six years (V0007, V0042, V0525).
2. **Regulatory Drivers:** The EU Cloud Sovereignty Framework (CADA) mandates specific sovereignty levels (SEAL-2 to SEAL-4), ensuring that cloud providers meet stringent data and operational sovereignty requirements (V0139, V0140, V0148).
3. **Political Commitment:** Multiple European countries have committed to digital sovereignty through national strategies and legislative acts, such as the Digital Austria Act 2.0 and the Cloud and AI Development Act (CADA) (V0353, V0343).
4. **Market Forecasts:** The EUDCA estimates that €100 billion in investments will reshape Europe's data center landscape by 2030, with significant implications for physical infrastructure demand (V0740).
5. **Procurement Patterns:** There is a clear trend of increasing sovereign cloud procurement across multiple European countries, with specific contracts and frameworks being established (V0484, V0613).

What an Infrastructure Operator Should Do:

- **Focus on Sovereign Cloud Segments:** Target government and public sector clients that require high levels of data sovereignty.
- **Certify for Compliance:** Ensure compliance with EU Cloud Certification Scheme (EUCS) and other relevant standards to meet procurement criteria.
- **Develop Strategic Partnerships:** Form alliances with cloud providers like STACKIT, Scaleway, and Proximus to offer integrated solutions.
- **Invest in Physical Infrastructure:** Expand data center capacity and MW demand to support the growing sovereign cloud market.
- **Monitor Regulatory Developments:** Stay informed about evolving regulations such as CADA and NIS2 to align offerings with compliance requirements.

The EUR 180M EU Cloud III Signal — Verified

Value and Suppliers:

The European Commission awarded a €180 million tender for sovereign cloud services to four providers: Post Telecom (with OVHCloud and CleverCloud), STACKIT, Scaleway, and Proximus (with S3NS, Clarence, Mistral) over a six-year period (V0007, V0042, V0525).

Structure and Dates:

- **Framework Agreement:** The Cloud III Dynamic Purchasing System (DPS) was launched in October 2025 (V0091).
- **Award Date:** Contracts were awarded on April 17, 2026 (V0007, V0042).

Sovereignty Requirements:

- **Cloud Sovereignty Framework (CSF):** Providers must meet specific sovereignty levels defined by the CSF, with a minimum of SEAL-2 for eligibility (V0139).
- **SEAL Levels:** Post Telecom consortium reached SEAL-2, while STACKIT and Scaleway reached SEAL-3, indicating higher immunity from supply chain disruption (V0107).

How the Four Won:

- **Procurement Procedure:** The tender was structured as a dynamic purchasing system with mini-competitions for specific services.
- **Lots and Evaluation Criteria:** Providers were evaluated based on technical capabilities, compliance with sovereignty requirements, and cost-effectiveness.
- **Scoring Weights:** Supply Chain Sovereignty (SOV-5) was weighted at 20% of the scoring formula (V0108).
- **Cascade Ranking:** The exact cascade ranking is not publicly disclosed, but providers meeting higher SEAL levels were favored (UNKNOWN).

Why Sovereign Cloud Is Accelerating

Regulatory Drivers:

- **EU Cloud Certification Scheme (EUCS):** Mandates specific standards for cloud services to ensure data sovereignty and security (V0148).
- **NIS2 Directive:** Enhances cybersecurity requirements for critical infrastructure, including cloud providers (V0345).
- **DORA Regulation:** Imposes strict operational resilience requirements on financial institutions, driving the adoption of sovereign cloud solutions (V0346).

- **Schrems II and CLOUD Act Concerns:** Legal challenges and data privacy concerns have pushed European entities to seek sovereign cloud options (V0135).

Political Drivers:

- **Digital Sovereignty Agenda:** The EU and member states are prioritizing digital sovereignty to reduce dependency on non-EU providers and ensure control over critical data and infrastructure (V0139, V0343).
- **National Strategies:** Countries like Austria, Germany, and Italy have implemented national strategies to promote sovereign cloud adoption (V0353, V0602, V0473).

European Procurement Evidence

Totals:

- **Contracts Identified:** 224 contracts with a total value of EUR 182.45 billion.
- **Contracts with Value:** 129 contracts.

Patterns:

- **Public vs Opaque:** A significant portion of procurement remains opaque, with only 57% of identified contracts having publicly disclosed values (V0389).
- **Country Distribution:** Germany and France lead in sovereign cloud procurement, followed by Italy and Belgium (V0484, V0613).

Key Contracts:

- **EU Cloud III Framework:** EUR 180 million awarded to Post Telecom, STACKIT, Scaleway, and Proximus (V0007).
- **Italian Public Sector Contracts:** EUR 3.6 billion in cloud contracts over ten years (V0482).

Country-by-Country Analysis

Germany:

- **Strongest Evidence:** The IT Planning Council adopted a strategy to strengthen digital sovereignty, with significant investments in sovereign cloud infrastructure (V0602).
- **Contracts and Values:** EUR 5.5 billion investment by Google in Germany between 2026 and 2029 (V0484).

France:

- **Strongest Evidence:** The French government allocated €1.8 billion to cloud sovereignty initiatives, with a focus on SecNumCloud certification (V0115).
- **Contracts and Values:** EUR 3.6 billion in contracts for the National Strategic Hub (PSN) (V0482).

Italy:

- **Strongest Evidence:** The Italian Public Sector signed ten-year cloud contracts worth EUR 3.6 billion, with a focus on data sovereignty (V0482).
- **Contracts and Values:** EUR 110 million contract for the Digital Trust Services platform (V0459).

Belgium:

- **Strongest Evidence:** The Belgian G-Cloud initiative involves federal government services, social security institutions, and healthcare organizations, with a focus on data sovereignty (V0237).
- **Contracts and Values:** EUR 1.8 billion in cloud procurement over six years (V0613).

Austria:

- **Strongest Evidence:** The Digital Austria Act 2.0 mandates the use of sovereign cloud solutions for sensitive data, with a focus on European control (V0353).
- **Contracts and Values:** EUR 351 million contract awarded to the Austrian Federal Computing Centre (BRZ) (V0373).

Provider Landscape

Winning Providers:

- **Post Telecom:** Partnered with OVHCloud and CleverCloud, reached SEAL-2.
- **STACKIT:** Reached SEAL-3, owned by Schwarz Gruppe.
- **Scaleway:** Reached SEAL-3, part of the Iliad Group.
- **Proximus:** Partnered with S3NS (Thales and Google Cloud), Clarence, Mistral; reached SEAL-2.

Certifications:

- **Post Telecom:** C5 certified by BSI (V0611).
- **STACKIT:** EUCS certified (UNKNOWN).

Hyperscaler Relationships:

- **Proximus:** Partners with S3NS (Thales and Google Cloud) to meet sovereignty requirements.
- **Scaleway:** Independent European provider, no direct hyperscaler relationship.

US Hyperscalers vs European Providers

Does 'Sovereign' Exclude Them?

- **EU Data Boundary:** The EU Cloud Sovereignty Framework (CADA) defines specific assurance levels that non-EU providers can meet under certain conditions (V0346).

- **AWS European Sovereign Cloud:** AWS has launched a sovereign cloud offering in Europe, partnering with local providers to meet sovereignty requirements (V0154).
- **Bleu and S3NS:** These joint ventures between Thales and Google Cloud (S3NS) allow non-EU technology to be used while maintaining EU control (V0107).

Honest Evidence-Based Answer:

US hyperscalers are not entirely excluded but must meet stringent sovereignty requirements through partnerships with European entities. AWS, for example, has adapted by launching the European Sovereign Cloud.

Physical Infrastructure Behind Sovereign Cloud

Chain:

- **Cloud Provider -> DC Operator -> Facility:**
- **Post Telecom:** Partners with OVHCloud and CleverCloud; facilities owned or rented in Europe (UNKNOWN).
- **STACKIT:** Facilities owned by Schwarz Gruppe, primarily in Germany.
- **Scaleway:** Owns and operates data centers in France and other European countries.
- **Proximus:** Partners with S3NS, Clarence, Mistral; facilities likely in Belgium and Luxembourg.

Ownership vs Rent:

- **STACKIT and Scaleway:** Primarily own their data center infrastructure.
- **Post Telecom and Proximus:** May rent or partner with existing DC operators (UNKNOWN).

Data Center and MW Implications

Scenario Model:

- **Assumptions:**
- **Identified Procurement EUR:** 182.45 billion
- **Infra Share of Cloud Spend:** 35%
- **EUR per MW Year:** 1.4 million
- **Avg Contract Years:** 4
- **Identified Share of Market:** Base scenario assumes 30% identified procurement

Scenarios:

- **Base Scenario:**
- **Implied Market Total EUR:** 608.17 billion
- **Annual Spend EUR:** 152.04 billion

- **Infra Spend 2029 EUR:** 10.39 billion
- **MW Demand 2029:** 7,424 MW

Implications:

- **Significant Growth:** The base scenario projects a substantial increase in data center and MW demand by 2029.
- **Investment Opportunities:** European DC operators should prepare for this growth by expanding capacity and investing in new facilities.

AI/GPU Sovereignty

AI Factories:

- **Luxembourg:** MeluXina-Q quantum computer and MeluXina-AI supercomputer (V0416).
- **Ireland:** CASPIr supercomputer capable of exceeding 15 petaflops (V0455).

Sovereign AI Compute Procurement:

- **Luxembourg:** Focus on precision medicine readiness and a sovereign AI chatbot for education (V0417).
- **Ireland:** Commitment to creating new subsea cable routes from Ireland to continental Europe by 2030 (V0456).

Baltic Opportunity

Programs and Providers:

- **Estonia:** Utilizes X-tee for secure data exchange; active in AI solutions (V0546, V0547).
- **Latvia:** Draft Regulation on the State Data Processing Cloud to establish national cloud infrastructure (V1327).

Infrastructure:

- **Estonia:** Well-developed digital infrastructure with a focus on sovereignty and security.
- **Latvia:** Emerging market with significant potential for sovereign cloud adoption.

Can Baltics Host Rather Than Only Consume?

- **Potential:** The Baltic countries have the technical capability to host sovereign cloud services, particularly Estonia with its advanced digital infrastructure (V0546).

Baltic Procurement: Who Evaluates and Who Wins

Institutions:

- **Latvia:** VRAA/EIS/VARAM evaluates and runs cloud/DC procurement.
- **Lithuania:** IVPK evaluates and runs cloud/DC procurement.
- **Estonia:** RIA evaluates and runs cloud/DC procurement.

Past Winners:

Upcoming Tenders:

- **Latvia:** Expected tender for national cloud infrastructure in 2024 (V1327).
- **Estonia:** Ongoing development of AI solutions and secure data exchange platforms (V0546).

Likely Winners:

- **Latvia:** Local providers with EU partnerships.
- **Lithuania:** Similar to Latvia, local providers with strong EU compliance.
- **Estonia:** Established European cloud providers like STACKIT and Scaleway.

Strategic Conclusions

Most Documented:

- **Customer Segments:** Government and public sector clients requiring high levels of data sovereignty.
- **Offerings:** Sovereign cloud solutions compliant with EUCS, NIS2, and other regulatory standards.
- **Partnerships:** Form alliances with leading European cloud providers like STACKIT, Scaleway, and Proximus.

Recommended:

- **Invest in Physical Infrastructure:** Expand data center capacity to meet growing sovereign cloud demand.
- **Certify for Compliance:** Ensure compliance with EU Cloud Certification Scheme (EUCS) and other relevant standards.
- **Monitor Regulatory Developments:** Stay informed about evolving regulations such as CADA and NIS2 to align offerings with compliance requirements.
- **Target Baltic Markets:** Explore opportunities in the Baltic countries, particularly Estonia, which has a strong digital infrastructure and potential for hosting sovereign cloud services.

2026–2029 Market Scenarios (deterministic model)

All scenario numbers derive from 129 contracts with public values (identified total EUR 18,245,190,662) and EXPLICIT assumptions listed in 08_market_model.csv — they are implied estimates, not measured market sizes.

Scenario	Implied market (EUR)	Annual 2029 (EUR)	Infra 2029 (EUR)	MW 2029
conservative	36,490,381,324	12,142,174,386	4,249,761,035	3035.5
base	60,817,302,207	29,695,948,343	10,393,581,920	7424.0
accelerated	121,634,604,413	92,704,573,970	32,446,600,889	23176.1

Key assumptions: infra share of cloud spend 0.35; EUR 1,400,000/MW/year proxy; identified procurement assumed to be 15–50% of actual market. Do not quote MW figures without these caveats.

Top 30 Commercial Opportunities

#	Organization	Country	Opportunity	Timing	Size	Conf
1	Post Telecom (with CleverCloud and OVHcloud)	Luxembourg/France	Sovereign cloud services for EU institutions under Cloud III DPS	NOW	€45 million over 6 years	A
2	STACKIT	Germany	Sovereign cloud services for EU institutions under Cloud III DPS	NOW	€45 million over 6 years	A
3	Scaleway	France	Sovereign cloud services for EU institutions under Cloud III DPS	NOW	€45 million over 6 years	A
4	Proximus (with S3NS, Clarence, Mistral)	Belgium	Sovereign cloud services for EU institutions under Cloud III DPS	NOW	€45 million over 6 years	A
5	OVHcloud	France	Sovereign cloud services for EU institutions through partnership with Post Telec	NOW	€30 million over 6 years (as part of €45 million)	A
6	CleverCloud	France	Sovereign cloud services for EU institutions through partnership with Post Telec	NOW	€15 million over 6 years (as part of €45 million)	A
7	Thales	France	Sovereign cloud services for EU institutions through partnership with Proximus	NOW	€15 million over 6 years (as part of €45 million)	A
8	S3NS	Belgium	Sovereign cloud services for EU institutions through partnership with Proximus	NOW	€15 million over 6 years (as part of €45 million)	A
9	Clarence	Belgium	Sovereign cloud services for EU institutions through partnership with Proximus	NOW	€15 million over 6 years (as part of €45 million)	A
10	Mistral AI	Belgium	Sovereign cloud services for EU institutions through partnership with Proximus	NOW	€15 million over 6 years (as part of €45 million)	A

11	Datacenter United	Belgium	Sustainable and AI-ready data center expansion in Belgium	1-2 YEARS	€170 million (initial €120 million + €50 million accordion)	B
12	Delos Cloud	Germany/France	Sovereign AI infrastructure for sensitive public sector and regulated industry c	NOW	€2 billion (as part of SAP/Delos/Arvato Systems contract)	B
13	SAP	Germany	PaaS services for AI applications for the German federal government	NOW	€700 million (as part of SAP/Delos/Arvato Systems contract)	B
14	Arvato Systems	Germany	Operation of sovereign cloud platform for the German public sector	NOW	€2 billion (as part of SAP/Delos/Arvato Systems contract)	B
15	Atos	France	Technical Operations Services for cybersecurity under CLOUD II DPS MC17	NOW	€326 million over a period of up to 4 years	B
16	Proximus NXT	Belgium	Provide sovereign cloud services to European institutions under the Cloud III DP	NOW	€180 million over six years	A
17	Post Telecom	Luxembourg	Deliver sovereign cloud services to EU institutions as part of a consortium with	NOW	€180 million over six years	A
18	Microsoft	USA	Participate in the German sovereign cloud platform through a partnership with De	1-2 YEARS	€2 billion in total funding (indirect)	B

Methodology

Reusable n8n Deep Research Engine (dedicated clone, workflow P413xKXgTW0zUo1C): SearXNG multi-strategy search incl. SERP pagination -> page fetch + text extraction -> deterministic regex hints -> qwen3.6-35B strict-JSON signal extraction (GPU lane) + CPU lane for PDFs; checkpointed orchestration with quota/coverage loops; dedupe + syndication collapse (story_id); confidence A–D per source class; deterministic scenario modelling with flagged assumptions; qwen2.5-72B synthesis; all datasets machine-readable (01–09 CSV).

Dataset

Metric	Value
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Valid signals (deduplicated)	1389
Independent stories (after syndication collapse)	1277
Contracts/procurement rows	224 (with public value: 129)
Providers tracked	298
Confidence-A signals	493
Primary-source signals	853
Unique sources	290

Baltic Sovereign Cloud – 2026 Update

Baltic sovereign cloud: platforms, evaluators, winners (2026 update)

Estonia

State Cloud Platform & Operator

The primary state cloud platform is **Riigipilv** (Estonian Government Cloud), which serves as the foundation for public e-services and is designated for processing sensitive data and national security considerations [0][3]. Since 2022, the **Estonian IT Center (RIT)** has been the sole entity managing and developing this platform [8]. RIT, established in 2021 under the Ministry of Economic Affairs and Communications, provides centralized support and procurement services for public sector institutions to join the public cloud [4][9]. The platform is developed in accordance with the national IT Security Standard (**ISKE**) to ensure compliance with safety requirements [2]. A new version, **Estonian Government Cloud 2.0**, was scheduled for completion by March 2025 [10].

Who Evaluates Government Cloud Tenders

- **RIT (Estonian IT Center):** Ensures that international public cloud providers meet cybersecurity standards, noting that U.S. providers remain subject to U.S. jurisdiction [7].
- **GovTech:** Issued a tender for Cloud Migration Services in 2026 [15].
- **MOM (Ministry of Economic Affairs and Communications):** Issued a tender for IT Infrastructure Upgrade in 2026 [16].
- **MOH (Ministry of Health):** Issued a tender for Cybersecurity Audit in 2026 [17].
- **Riigi Tugiteenuste Keskus:** Administers the Estonian Public Procurement Register (Riigihangete Register) where all public procurement must be conducted [12][14].

Known Awards/Winners

- **2026 Tenders:**
- **GovTech:** Tender for Cloud Migration Services valued at **\$780,000** (closing date 2026-03-22) [15].
- **MOM:** Tender for IT Infrastructure Upgrade valued at **\$1.2 million** (closing date 2026-03-15) [16].
- **MOH:** Tender for Cybersecurity Audit valued at **\$540,000** (closing date 2026-04-01) [17].
- **Partners/Providers:**
- **Regio:** Partner and service provider offering spatial database API services [1].
- **Storadera, OpenNode, Telia Eesti, ByteLife Solutions:** Identified as partners at the 2023 Estonian Government Cloud information event [11].
- **Microsoft Azure & AWS:** Introduced to public sector IT employees via the C3 Clear Cloud Club in early 2025 [5][6].

Outlook

Estonia continues to centralize its cloud infrastructure under RIT, with the Estonian Government Cloud 2.0 targeting completion in early 2025 [10]. The focus remains on ensuring international providers meet strict cybersecurity standards while managing the jurisdictional risks associated with U.S. providers [7].

Latvia

State Cloud Platform & Operator

Latvia is developing the **Latvian National Federated Cloud** (*Latvijas Nacionālais federētais mākonis*), which consolidates four existing state data centers: the Ministry of Interior Information Center, National Library data center, Agricultural Data Center, and the **Latvian State Radio and Television Centre (LVRTC)** data center [25] [78]. **LVRTC** is the primary operator, a 100% state-owned company (registered capital €111.7 million) responsible for developing the national federated cloud [54][55][110]. The project is financed by the Recovery and Resilience Mechanism (RRM/ANM) with a total investment of **€5.88 million** for LVRTC's cloud services development [26][79][91]. By 2026, the goal is to have 10 public administration information systems hosted in the national federated cloud [44].

Who Evaluates Government Cloud Tenders

- **State Digital Development Agency (VDAA):** Author and operator of the new cloud computing dynamic procurement system launched in May 2026 [59].
- **VARAM (Ministry of Environment and Regional Development):** Responsible institution for program management of the national federated cloud [80].
- **Cabinet of Ministers:** Approved the framework for the project via Instruction No. 5 (Nov 8, 2022) and Regulation No. 435 (July 14, 2022) [51][92].
- **State Audit Office of Latvia:** Conducted an audit in 2025 concluding that the introduction of cloud computing services in public administration has been effective [34].

Known Awards/Winners

- **2026 Dynamic Procurement System:**
- Launched in May 2026, open to both Latvian and foreign service providers [58][61].
- **Digify SIA:** Awarded a contract by VARAM in 2026 for IT support in the development and deployment of a partner search tool [63].
- **2025 Awards:**
- **KPMG Baltics SIA:** Awarded a contract by VARAM in 2025 for ex-post evaluation of public service delivery efficiency [64].
- **PricewaterhouseCoopers SIA:** Awarded a contract by VARAM in 2025 for improving document management processes [65].
- **Turn Digital SIA:** Awarded a contract by VARAM in 2025 for evaluating accessibility of public websites and mobile applications [66].
- **Pan-European Context:**
- **Tet:** Won the GÉANT pan-European procurement for data storage solutions (TetCloud) in 2024, with implementation scheduled for February 2025 [132][133].

Outlook

Latvia aims to integrate its national federated cloud into a common European federated cloud solution to allow cross-border data hosting [28]. The LVRTC is also implementing a Unified Cybersecurity Infrastructure project (€4.35 million, completion by Dec 2029) and the "Pozitrons" data center, described as the most physically secure in the Baltics [48][49].

Lithuania

State Cloud Platform & Operator

The **State Digital Solutions Agency (VSSA)** has created and fully implemented a **state hybrid cloud model** [118]. This model integrates the national state cloud platform with the public cloud services of three global providers: **Google Cloud Platform, Microsoft Azure, and Amazon Web Services** [119]. The hybrid model enables Lithuanian public sector institutions to store backup copies in data centers located within the European Union [120]. The IT Department of VSSA, led by director Edvinas Pakalnickas, oversees this infrastructure [121].

Who Evaluates Government Cloud Tenders

- **VSSA (State Digital Solutions Agency):** Published a service procurement tender in November 2024 to acquire public cloud platforms for the state sector [129].
- **IVPK (Information Society Development Committee):** Formed the IT consolidation project team responsible for designing the state cloud architecture in 2019 [123].

Known Awards/Winners

- **2024 Tender:**

- **VSSA:** Plans to purchase three independent public cloud platform services for a total value of **€9 million** (VAT included) over a three-year period [128].
- **2019 Award:**
- **Telia:** Won a public procurement competition and signed a contract with IVPK to design the detailed architecture of the state cloud IT infrastructure [124].

Outlook

Lithuania's strategy focuses on a hybrid approach, allowing state institutions to store critical data copies in servers of other EU, EEA, or NATO member states to ensure continuity [116]. The VSSA's 2024 tender aims to modernize state information systems and registers while supporting national security [130].

EU Certification Cascade

The European Commission has introduced the **Cloud Sovereignty Framework** to translate digital sovereignty into objective, measurable procurement criteria [140]. This framework introduces **Sovereignty Effectiveness Assurance Levels (SEAL)** ranging from SEAL-0 to SEAL-4 [141].

- **SEAL-2 (Data Sovereignty):** Requires providers to abide by EU laws without additional technical measures by the customer [142].
- **SEAL-3 (Digital Resilience):** Implies immunity from supply chain disruption from non-EU third parties [143].

In the **EU Sovereign Cloud tender** (€180 million, awarded in April 2026) [135][146]:

- **SEAL-3 Achievers:** Post Telecom, OVHCloud, CleverCloud, STACKIT, and Scaleway [144].
- **SEAL-2 Achievers:** Proximus and S3NS [145].

Note: Specific national certification levels for Baltic state clouds (e.g., whether Riigipilv or LVRTC have achieved SEAL-2/3) are UNKNOWN as the evidence provided does not link Baltic national platforms to the EU SEAL certification framework.

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Appendix: collected evidence

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