



## MARKET NOTE

# Bitdefender and OVHcloud Join Forces with European Sovereign Cybersecurity Platform Offering

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## EXECUTIVE SNAPSHOT

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Demand for sovereign cloud and security technologies and services is growing in Europe driven by a high level of geopolitical uncertainty. The region is seeing the emergence of a growing spectrum of solutions and services delivered by providers that are headquartered in the region. One such case is a partnership between OVHcloud and Bitdefender to provide the latter's flagship security platform, GravityZone, on OVHcloud's sovereign and certified cloud service.

### Key takeaways

- Sovereignty has become a very hot topic in Europe in recent years driven by geopolitical turmoil, uncertainty around dependence on foreign technology platforms and providers, and concerns around access to data and systems.
- Regulation plays a major part in demands for sovereignty, with the EU Data Act and the EU AI Act setting strict requirements for data residency, access, and AI system governance.
- The market is also seeing an evolution in the discussions and demands around the sovereign services provided. Sovereignty is not viewed just as a contractual consideration, but as an architectural one, and one of technical feasibility.
- The partnership of OVHcloud and Bitdefender is likely to find new customers whose risk tolerances have changed over the past year to the extent that they are willing to move data and workloads to a European-headquartered cloud provider — secured by a European-headquartered security company.
- The drivers and demand are in place. The onus will be on Bitdefender and OVHcloud to deliver an affordable solution and service at speed and scale.

## IN THIS MARKET NOTE

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### Introduction

Sovereignty has become a very hot topic in Europe in recent years driven by geopolitical turmoil, uncertainty around dependence on foreign technology platforms and providers, concerns around access to data and systems, and more.

This is playing out at multiple levels, from a focus on the legal governance of data according to the laws of the country where it is generated, collected, or stored to a focus on digital systems themselves, including the technology and infrastructure. Regulation plays a major part in demands for sovereignty, with the EU Data Act (in force from September 2025) and the EU AI Act (phased in throughout 2025) setting strict requirements for data residency, access, and AI system governance.

In terms of adoption, the first years of what could be called the European "sovereignty drive" were characterized by cloud service providers starting to offer sovereign services. According to IDC's *Worldwide Digital Sovereignty Survey*, around 30% of European organizations were using sovereign cloud solutions in 2023 and 2024; in 2025, this surged to 40%, with a further 31% planning to use sovereign cloud. Some of the key adoption drivers for this trend are:

- Protection against extraterritorial data requests
- Compliance with national and regional legislation
- Enhanced data privacy and security
- Resilience amid geopolitical volatility

The market is also seeing an evolution in the discussions and demands around the sovereign services provided. Sovereignty is not viewed just as a contractual consideration, but as an architectural one, and one of technical feasibility. Questions have moved from "Where is the platform hosted?" to "Who governs it, and from where, and which foreign government can legally impose its will on providers of our critical technology?"

Europe is the first market where this shift is happening at scale, and the outcome of these shifts is being felt across the EU. Numerous national developments are underway in France, Germany, Italy, Luxembourg, and Switzerland, among others. At the regional level, major pan-European projects (e.g., Gaia-X, IPCEI-CIS, virt8ra, EuroStack) are — with varying degrees of progress — focused on building federated, interoperable, and open source-based sovereign cloud and edge ecosystems.

The global hyperscalers have responded to these developments in an attempt to protect market share and convince buyers that their data and workloads are safe in the hyperscalers' sovereign solutions. AWS, Microsoft, and Google have all launched or

expanded European sovereign cloud offerings, with dedicated EU entities, EU-based personnel, and new controls for data residency, encryption, and operational autonomy.

Nevertheless, local champions are emerging and gaining traction due largely to growing uncertainty in Europe over public and private sector dependence on foreign-headquartered technology providers. In France, OVHcloud provides its Bare Metal Pod cloud platform, which has achieved SecNumCloud certification from the French cybersecurity authority, ANSSI. The SecNumCloud certification denotes compliance with cloud security best practices, strategic autonomy, and enhanced security.

Most recently, in October 2025, OVHcloud and Romania-based cybersecurity vendor Bitdefender announced the launch of a sovereign cybersecurity platform hosted on OVHcloud's SecNumCloud-certified service.

## **Bitdefender and OVHcloud**

Bitdefender is one of Europe's most well-established cybersecurity vendors, founded in 2001, with more than 1,800 employees and offices across the region. Its security platform and engine have reached a high level of maturity and are used by more than 200 technology partners worldwide.

Its core offering is GravityZone, an extended detection and response (XDR) platform that incorporates a broad spectrum of products and technologies, from endpoint, network, and cloud security to attack surface management, compliance management, and risk management.

OVHcloud is a French-founded independent cloud service provider with 46 datacenters across 10 countries and 4 continents. The company has more than 3,000 employees and serves 1.6 million customers. In 2021, OVHcloud achieved the SecNumCloud qualification, covering over 360 technical, organizational, and legal requirements to ensure security and immunity from extraterritorial laws. The company's SecNumCloud operations are handled exclusively by OVHcloud personnel based in Europe. OVHcloud also has SOC 2 Type 2 certification in the United Kingdom, the United States, and Canada, as well as ISO 27001, ISO 27701, C5 (in Germany), ENS (in Spain), AGID (in Italy), and HDS (in France).

The partnership between Bitdefender and OVHcloud aims to deliver a cybersecurity platform, Bitdefender GravityZone, hosted on a sovereign cloud and operated without foreign subprocessors or foreign access. The partners aim to ensure sovereignty at the data, technical, and operational levels, as well as ensuring transparency, auditability, and continuous compliance.

Having control over data access and use will drive regulation conformity for EU legislation such as the GDPR, NIS 2, and DORA. One of the key concerns around NIS 2 compliance is the challenge for organizations operating across multiple member states, as transposition of

the directive brings unique nuance to each market. Bitdefender and OVHcloud will begin offering multicountry NIS 2 capabilities in 2026. The partners also stress their ability to rapidly deliver the service without compromising operational capability, a critical consideration for the types of customer organizations they are targeting.

## Projected market impact

Bitdefender and OVHcloud have mapped out clear target sectors and segments where they anticipate making the greatest initial impact. These include EU entities, public sector bodies in EU member states, and organizations with critical workloads in key sectors such as defense, healthcare, energy, and utilities.

In terms of country markets, the two companies will initially focus on France, Germany, Spain, Italy, and Romania. The aim is to duplicate the high levels of security, sovereignty, and compliance that they are able to deliver in France into other countries and regions. Further ahead, the partners are looking at the United Kingdom and even Canada.

Both companies report that they are having many conversations with prospects around reducing dependency on U.S. tech providers, with a move toward European providers. The volatile geopolitical environment in 2026, as well as ongoing European regulatory developments, will influence how urgent the tone of those conversations becomes, and how much traction this sovereignty offering will gain in the long term.

## IDC'S POINT OF VIEW

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- There is clearly growing demand in Europe for cloud and security technologies and services delivered by providers that are headquartered in the region. This demand is motivated by a high level of geopolitical uncertainty, which shows no signs of decreasing in the foreseeable future.
- Regulatory considerations also have an impact, and the ability of local providers to deliver certified services that align closely with EU compliance requirements puts them in a strong position in the region.
- As a result, the partnership of OVHcloud and Bitdefender is likely to find new customers whose risk tolerances have changed over the past year, and who are more willing to move data and workloads out of the hyperscalers and into a European-headquartered cloud provider — secured by a European-headquartered security company.
- The increasingly volatile international risk landscape is at the heart of Europe's technology (and security) sovereignty discussion. Nevertheless, changing between technology or service providers can be a major step and, although cost is often the key factor, there are many nonmonetary factors that now rank toward the top.

- In some cases, the nature of the customer (e.g., critical infrastructure and other regulated industries) will influence their risk tolerance, as well as changing customer requirements (e.g., RFIs that only accept providers headquartered in a specific region).
- In other cases, external forces may drive decisions to switch providers. These could include sanctions against providers from specific geographies, embargoes on provision into certain countries, or even legal cases brought to broader attention by privacy advocates.
- The drivers and demand are in place. The onus will be on Bitdefender and OVHcloud to deliver an affordable solution and service at speed and scale.

## LEARN MORE

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### Related research

- *How Digital Sovereignty Impacts AI and Sovereign Cloud Usage* (IDC #US52843425, December 2025)
- *OVHcloud Ecosystem Summit 2025: From Ecosystem to Network — Scaling Partner Impact Through Structure, Specialization, and Marketplace Innovation* (IDC #EUR153965925, December 2025)
- *Europe Is Stepping Up: Insights from the Paris VivaTech Exhibition 2025* (IDC #EUR153695025, August 2025)

### Synopsis

This IDC Market Note details key trends in sovereignty in Europe and how those are driving the emergence of major new projects in the region, as well as local champions offering sovereign solutions. One of these is a new joint offering from France-based cloud service provider OVHcloud and Romania-based security platform vendor Bitdefender. IDC looks at how that partnership has developed, what the two partners are offering, and how it is expected to impact the market.

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