

Cloud Report 2026

Status Quo and Trends in Business and Politics

Cloud Report 2026

Status Quo and Trends in Business
and Politics

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Executive Summary

Cloud computing is a central component for companies in Germany as they undergo digital transformation, particularly in areas such as AI applications, databases, and IT security. The Bitkom Cloud Report annually examines how extensively companies use cloud solutions, which applications are increasingly moving to the cloud, and what strategic factors shape their cloud decisions. The focus is especially on questions relating to cost development, resilience, IT security, provider selection, and digital sovereignty.

The analysis is based on a representative survey conducted by Bitkom Research through computer-aided telephone interviews (CATI). A total of 603 companies across all industries in Germany with at least 20 employees were interviewed.

Key findings of the report:

- **Cloud computing is nearly universally established**
86 percent of companies are already using cloud computing, while another 14 percent plan to use it or are discussing doing so. Only 1 percent report that cloud computing is not a topic for them at all.
- **The cloud is increasingly becoming a business model**
22 percent of companies already offer their own products or services wholly or partially as cloud services, and another 23 percent are planning to do so.
- **Cloud-first is the most common strategic approach**
Among companies using the cloud, 33 percent pursue a "cloud-first" approach. 28 percent opt for "cloud too," and 17 percent for "cloud only."
- **IT security is the primary goal of cloud activities**
75 percent of users and planners aim to increase IT security through their cloud activities.
- **AI and innovative technologies are becoming significantly more important**
56 percent cite access to innovative technologies such as IoT or AI as a goal of their cloud activities. Among cloud solutions of future interest, AI services show the greatest increase: today, 42 percent use AI services from the cloud, and 69 percent expect them to be relevant in five years.
- **Databases, communication, and HR/finance remain central cloud applications**
Looking at the next five years, companies primarily expect cloud solutions to be highly relevant for storage space (84 percent), communication, HR/finance (each 81 percent), and databases (78 percent).
- **Politics and administration should further promote sovereign cloud solutions**
90 percent believe that government agencies should increasingly rely on European or sovereign cloud solutions.
- **Transparency and regulation remain key issues**
87 percent say that internationally sovereign cloud offerings do not provide sufficient transparency regarding data processing and access rights. 53 percent see unclear or inconsistent legal and regulatory requirements.

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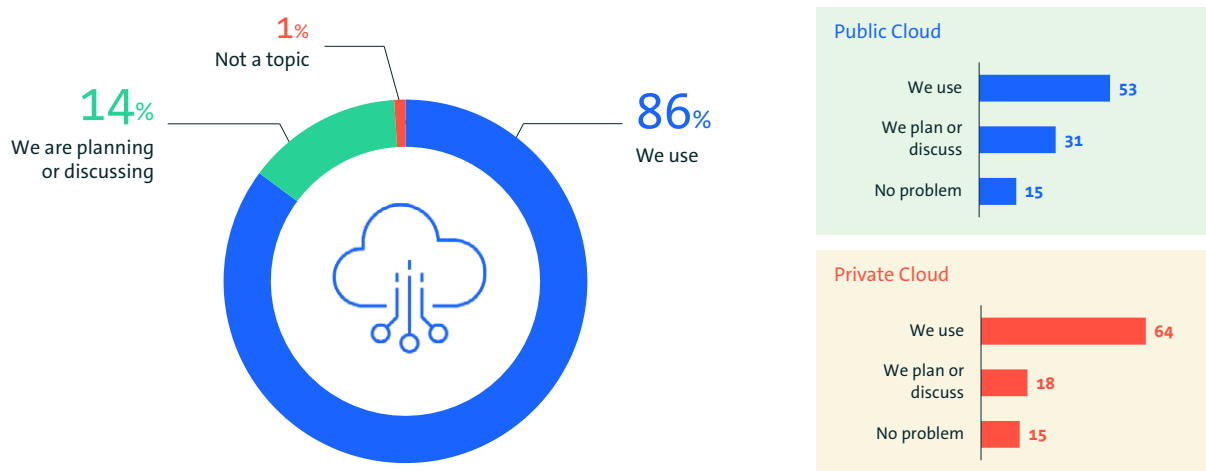
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1 Cloud Adoption: Usage, Maturity Level and Business Models

1 Cloud Adoption: Usage, Maturity and Business Models

1.1 Current State of Cloud Usage

To what extent does your company use cloud computing?



Base: All companies (n=603) | Deviations from 100% due to rounding (left) | Missing values to 100% (right): "Don't know/no answer" | Source: Bitkom Research 2026

Figure 1: Use of Cloud Computing in German Companies

Hardly any companies can do without the cloud

Cloud computing is widely established in business practice: 86 percent of companies currently use cloud services. Cloud usage is thus roughly at the same level as in the previous year, when 90 percent of companies used cloud services [Dataverse](#).

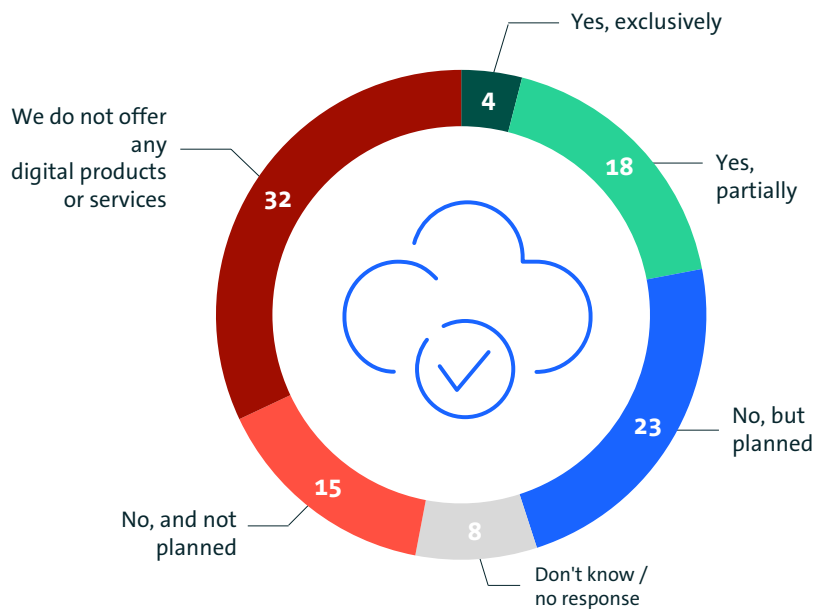
Another 14 percent are planning or discussing the use of cloud computing. Only 1 percent of companies currently deem the topic irrelevant. In this context, private clouds are used more frequently, by 64 percent of companies, compared with 53 percent for public clouds.

Public cloud refers to cloud services provided by external providers using shared infrastructure; a **private cloud** is a cloud environment operated exclusively for one organisation.

1.2 Cloud Services as Part of Your Own Offerings

Does your company offer any of its own products or services, either wholly or partly, as cloud services?

in percent



Base: All companies (n=603) | Deviations from 100 percent are due to rounding | Source: Bitkom Research 2026

Figure 2: Offering Own Products and Services as Cloud Services

Every fifth company provides its own cloud services

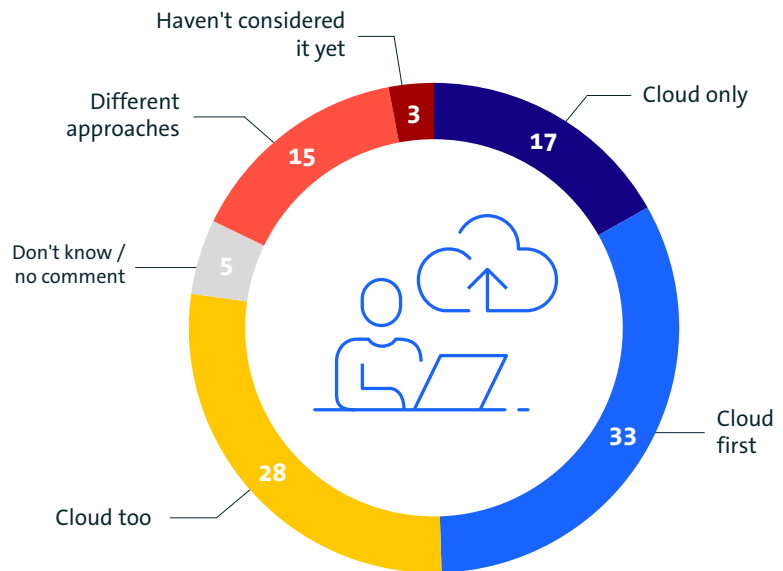
Companies are increasingly offering their own products and services via the cloud. More than one in five companies already offers its own products or services entirely or partly as a cloud service: 4 percent exclusively and 18 percent partially.

Another 23 percent are planning a similar offering. 15 percent have no such plans, while 32 percent do not offer digital products or services that are suitable for delivery as cloud services.

Thus, cloud computing is not only relevant for IT operations but is also part of the business model for many companies.

1.3 Cloud Strategies

Which of the following approaches best describes your company's cloud activities?



in percent

Base: Companies using cloud computing (n=517) | Deviations from 100 percent are due to rounding | Source: Bitkom Research 2026

Figure 3: Cloud Strategies of Companies Using Cloud Services

For every second company, the cloud is a priority

Even today, the cloud takes priority for every second company that uses it. 17 percent are pursuing a "cloud-only" approach, relying primarily on the cloud for applications and systems or migrating existing solutions to it.

Another 33 percent are adopting a "cloud-first" approach and prefer cloud solutions for new projects.

28 percent merely supplement their existing IT infrastructure with cloud applications as part of a "cloud-too" approach.

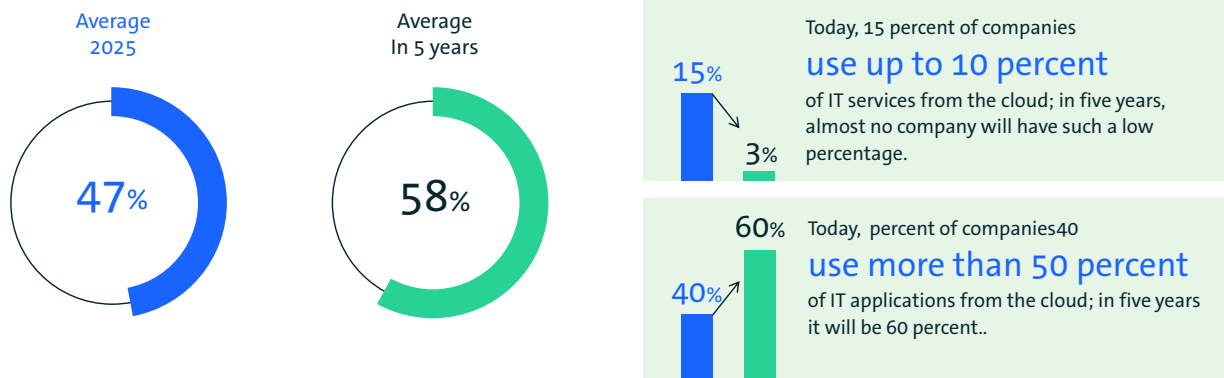
15 percent pursue different strategies depending on the business area, and 3 percent have not yet addressed the issue.

As company size increases, the "cloud-only" approach becomes more prevalent: while 16 percent of companies with 20 to 99 employees follow this approach, the figure rises to 21 percent among companies with 100 to 499 employees and 26 percent among those with more than 500 employees

[↗Dataverse.](#)

1.4 Cloud Share 2025 and Expected Development

What proportion of your IT applications did you run in the cloud in 2025, and what proportion do you expect to run in the cloud in five years' time?



Base: All companies (n=603) | Source: Bitkom Research 2026

Figure 4: Share of cloud-based IT applications today and in five years

Not everything is moving to the cloud

Cloud applications continue to gain importance, but they are not expected to fully dominate the IT landscape. Currently, 47 percent of IT applications in the German economy are cloud-based; in five years, this share is expected to rise to 58 percent.

Compared with the previous year, the change is relatively modest: In 2024, the average share stood at 38 percent, with the five-year forecast at 54 percent.

At the same time, the distribution is shifting significantly: While 15 percent of companies currently obtain less than 10 percent of their IT applications from the cloud, in five years this will apply to just 3 percent.

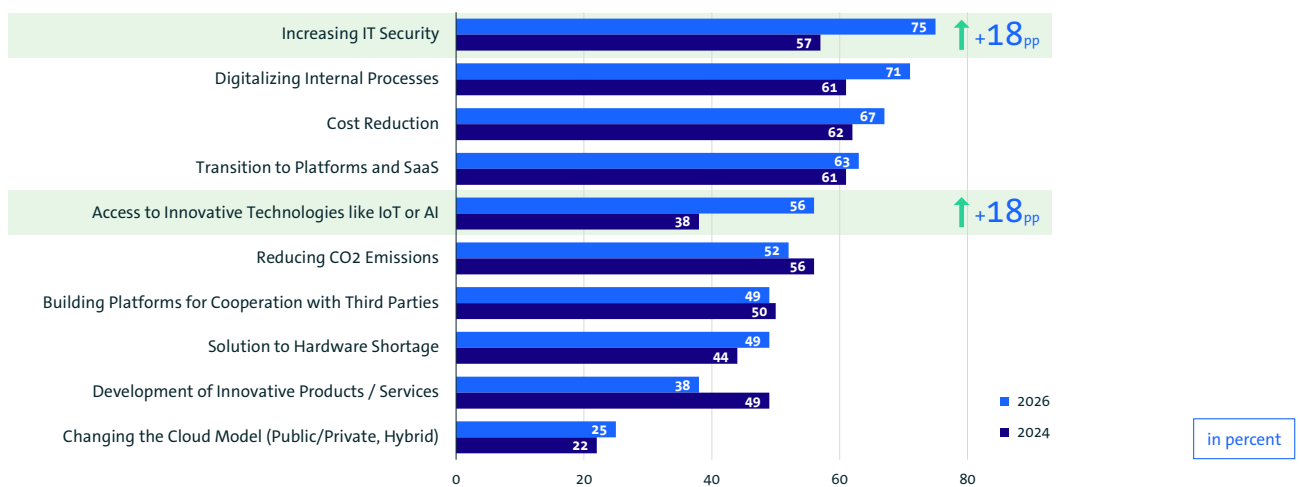
By contrast, the proportion of companies operating more than half of their IT applications in the cloud is expected to increase from 40 to 60 percent. Thus, the cloud is becoming the backbone of IT for an increasing number of companies, without completely replacing traditional or hybrid IT structures.

2 Goals, Operating Models and Applications

2 Goals, Operating Models and Application Areas

2.1 Objectives of Cloud Transformation

What are the objectives of your cloud activities?



Base: Users and planners of cloud projects (n=581, 2024: n=540) | Multiple answers possible | Source: Bitkom Research 2026

Figure 5: Objectives of Cloud Usage in Comparison 2024 and 2026

The cloud provides security and access to technologies

The reasons for using the cloud have shifted significantly over the past two years. The most important goal now is to increase IT security: three-quarters of companies that use or plan to use cloud services pursue this goal. This represents an increase of 18 percentage points compared with 2024 [↗Data-averse](#).

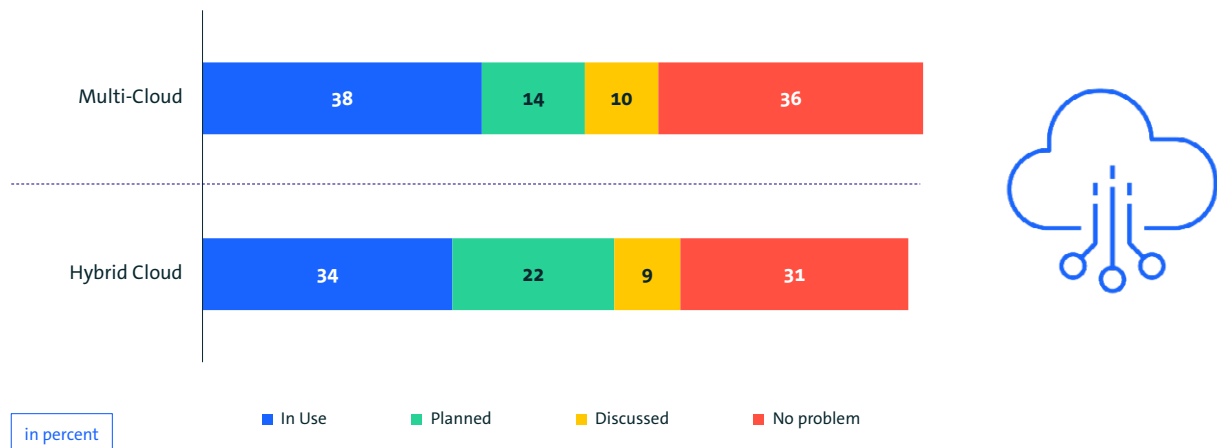
Access to innovative technologies such as IoT or artificial intelligence has also become significantly more important. 56 percent of companies cite this as a goal of their cloud activities, also representing an increase of 18 percentage points compared with two years ago.

Other key motives include the digitalisation of internal processes at 71 percent, cost reduction at 67 percent, and the transition to platforms and software as a service at 63 percent.

Additionally, companies are using the cloud to reduce CO₂ emissions, build collaboration platforms with third parties, overcome hardware shortages, and develop innovative products and services.

2.2 Hybrid Cloud and Multi-Cloud in Use

Does your company use multi-cloud or hybrid cloud solutions?



Base: Companies using cloud computing (n=517) | not illustrated: "Don't know/n.a." | Source: Bitkom Research 2026

Figure 6: Use and Planning of Multi-Cloud and Hybrid-Cloud Solutions

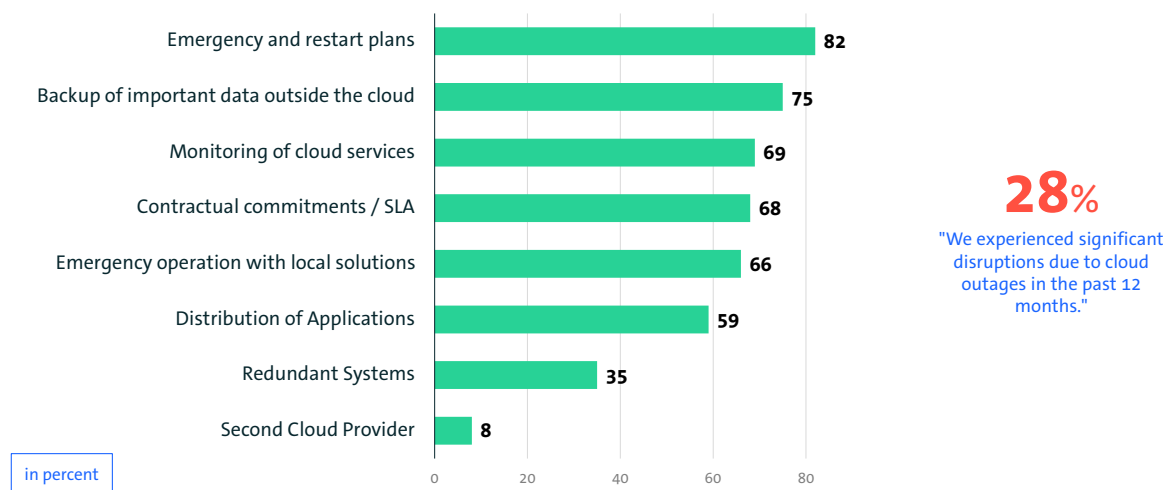
Majority doesn't want to rely on just one cloud

Many companies do not want to rely solely on a single cloud environment. 38 percent of companies using cloud services are already implementing a multi-cloud approach, sourcing cloud services from different providers. An additional 14 percent are planning to do so, and 10 percent are discussing the deployment of such solutions.

Hybrid cloud approaches are also widespread: 34 percent are already using a combination of private and public cloud services. Another 22 percent are planning to do so, and 9 percent are discussing their use.

2.3 Protection Against Disruptions Caused by Cloud Outages

How does your company protect itself against disruption caused by cloud outages?



Basis: Companies using cloud computing (n=517) | Multiple answers possible | Source: Bitkom Research 2026

Figure 7: Measures Taken by Companies to Protect Against Disruptions from Cloud Outages

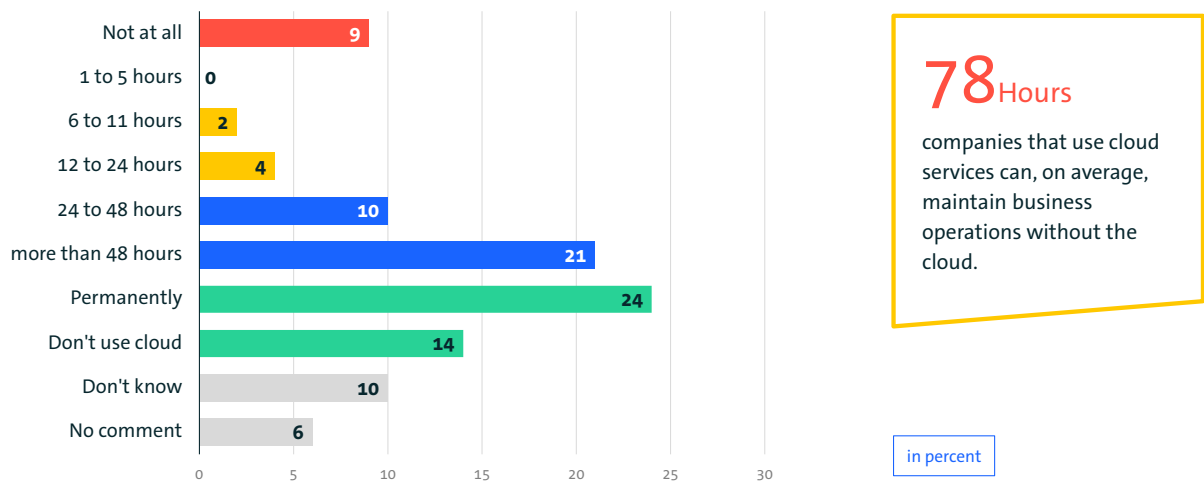
Companies Rely on Contingency Plans for Cloud Outages

Cloud outages pose a significant operational risk for companies: 28 percent of cloud users experienced major disruptions in the past twelve months. Consequently, many companies adopt various measures to mitigate the effects of an outage. The most common are contingency and restart plans, which 82 percent have in place. Three-quarters back up important data outside the cloud, 69 percent monitor their cloud services themselves, and 68 percent have agreed contractual commitments or service-level agreements with their providers.

Technical precautions also play an important role: 66 percent can maintain emergency operations with local solutions in the event of a cloud outage, 59 percent distribute their applications across different systems, and 35 percent rely on redundant systems. However, only 8 percent use a second cloud provider as a backup.

2.4 Resilience in Cloud Outages

How long could your company continue operating without cloud services?



Basis: All companies (n=603) or companies that use cloud computing (n=517) | Deviations from 100 percent are due to rounding | Source: Bitkom Research 2026

Figure 8: Potential Duration of Maintaining Business Operations During a Cloud Outage

If the cloud goes down, almost everything comes to a halt in 3 days

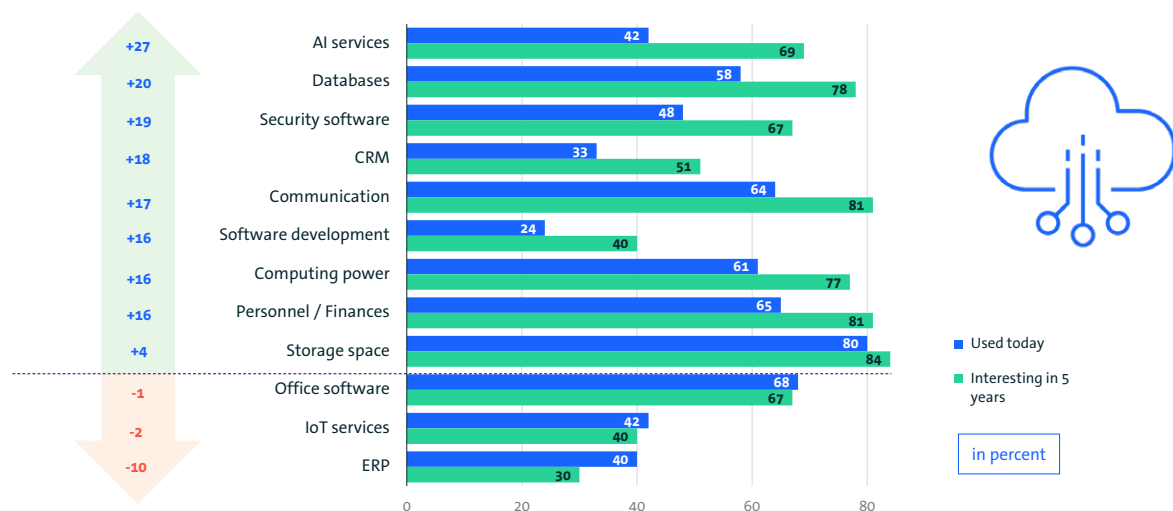
For many businesses, the cloud has become indispensable for day-to-day operations. 9 percent of companies would not be able to continue operating at all if the cloud failed. Another 2 percent could maintain operations for 6 to 11 hours, 4 percent for between 12 and 24 hours, and 10 percent for between 24 and 48 hours. 21 percent could manage without cloud services for more than 48 hours.

Nearly a quarter of companies (24 percent), however, say that they could maintain business operations indefinitely without the cloud.

Among companies that use cloud services, the average estimated time for which they could continue operating is 78 hours. Thus, prolonged cloud outages can quickly become critical for a significant proportion of the economy.

2.5 Current and Future Cloud Application Areas

Which solutions do you currently run in the cloud, and which could be of interest to you over the next five years?



Base: All companies (n=603) | Changes in percentage points | Multiple answers possible | Source: Bitkom Research 2026

Figure 9: Current and expected use of cloud-based applications by area of deployment

AI and data are driving forces behind cloud usage

The importance of cloud-based applications will continue to grow in the coming years, particularly as a result of increasing demand for AI and data-related applications. AI services are experiencing the most significant growth: today, 42 percent of companies use such cloud solutions, and in five years, this could rise to 69 percent. This represents an increase of 27 percentage points.

Databases, security software, and CRM systems are also expected to be increasingly sourced from the cloud in the future. For communication, software development, computing power, and HR and finance solutions, the anticipated growth rates are each between 16 and 17 percentage points. In contrast, cloud-based office solutions, IoT services, and ERP applications are expected to stagnate or even decline.

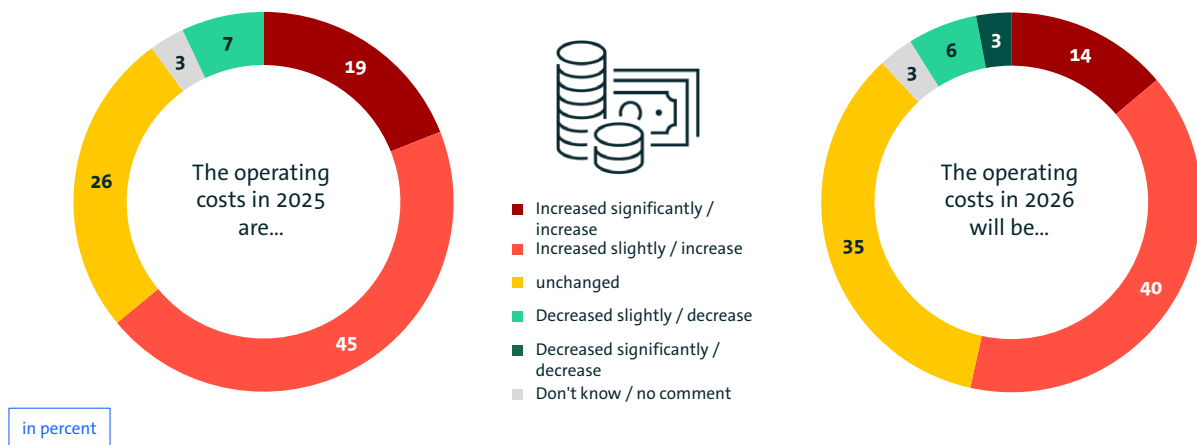
Thus, cloud and AI are becoming increasingly interconnected drivers of digital transformation: AI requires scalable computing power and access to data, often provided through cloud services.

3 Costs, Budgets and Investments

3 Costs, Budgets and Investments

3.1 Development of Cloud Operating Costs

How did the operating costs of your cloud solutions change last year, and how do you expect them to change in 2026?



Base: Companies using cloud computing (n=517) | Source: Bitkom Research 2026

Figure 10: Development of Operating Costs for Cloud Solutions 2025 and Expected Change 2026

The cloud is becoming more expensive for most companies

Unpredictable costs can be a reason why companies do not move all of their IT applications to the cloud. Last year, operating costs for cloud solutions rose for 64 percent of companies using the cloud: significantly for 19 percent and slightly for 45 percent. A majority also expects spending to increase in 2026. 14 percent anticipate a significant increase, and 40 percent expect a slight rise in operating costs.

35 percent of companies expect cloud costs to remain unchanged.

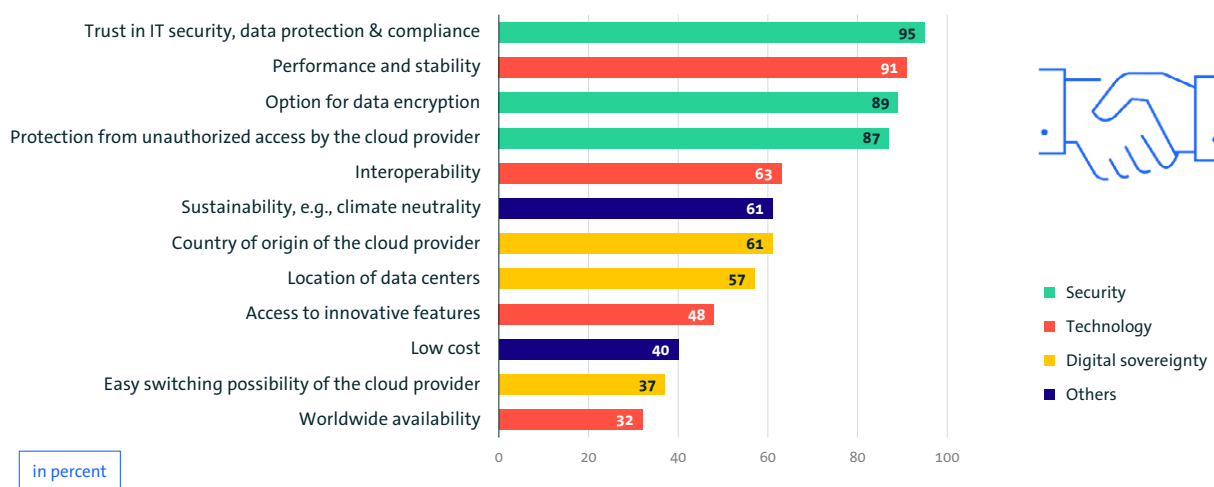
Only 9 percent, by contrast, expect costs to fall: 6 percent foresee a slight reduction, and 3 percent a significant decrease in operating costs.

4 Cloud Providers: Selection, Transition and Dependencies

4 Cloud Providers: Selection, Change and Dependencies

4.1 Selection Criteria for Cloud Providers

What are the must-have criteria when selecting a cloud provider?



Base: Users, planners, and discussants of cloud projects (n=598) | Multiple responses possible | Source: Bitkom Research 2026

Figure 11: Must-have criteria for choosing a cloud provider

Cloud providers: security and trust come first

When choosing a cloud provider, security and trust are clearly the top priorities. 95 percent of companies cite trust in IT security, data protection and compliance as essential criteria. Also particularly important are performance and stability at 91 percent, data encryption capabilities at 89 percent, and protection against unauthorised access by the cloud provider itself at 87 percent.

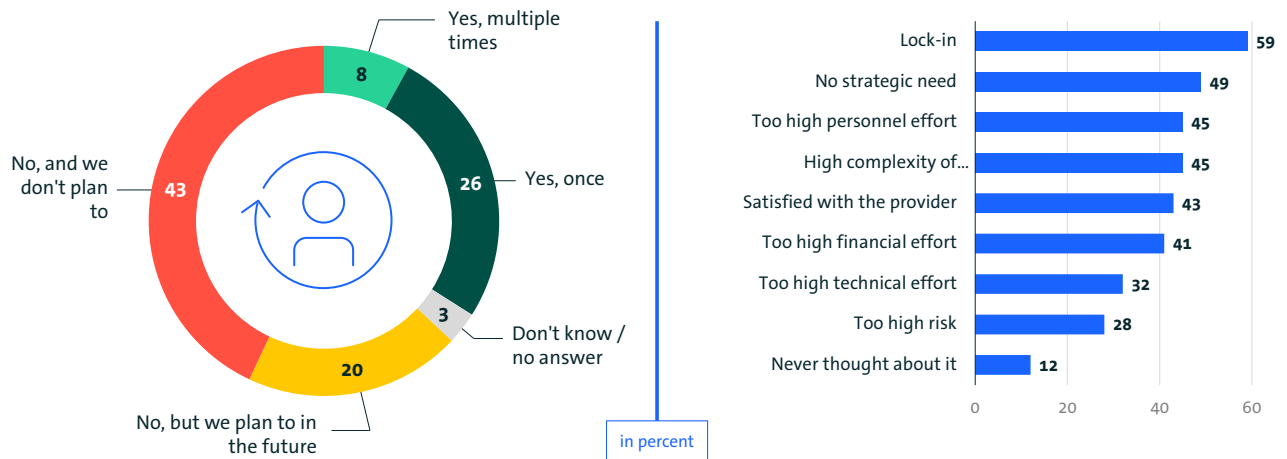
Aspects of digital sovereignty rank somewhat lower: 61 percent pay attention to the country of origin of the cloud provider, 57 percent to the location of data centres, and 37 percent to the ease of switching providers. Other relevant criteria include interoperability at 63 percent, sustainability at 61 percent, access to innovative functions at 48 percent, low costs at 40 percent, and global availability at 32 percent.

Thus, security remains the central decision-making criterion, both in terms of protection against attacks and data loss and against operational failures and unauthorised access.

4.2 Provider Switching and Switching Barriers

Have you ever switched cloud providers?

And what has made switching difficult or prevented you from doing so?



Base: Companies using cloud computing (n=517) | Source: Bitkom Research 2026

Figure 12: Experiences with switching cloud providers and key barriers to switching

Switching clouds? Not on the radar for many

So far, only a few companies using cloud services have switched cloud providers. Approximately one in three companies has already made such a switch: 26 percent once and 8 percent multiple times. Another 20 percent plan to switch in the future, while 43 percent do not foresee changing providers.

The biggest obstacle is vendor lock-in, cited by 59 percent of companies as a barrier to switching, for example due to difficulties with data exports or migration. This is followed by a lack of strategic need at 49 percent, the high level of staff resources required and high application complexity at 45 percent each, as well as satisfaction with the current provider at 43 percent.

Financial and technical challenges also make switching more difficult. 28 percent generally consider switching too risky, while 12 percent have not yet considered the issue. The cloud market could become more dynamic if companies consider switching options more strategically and specifically evaluate providers with a clear sovereignty profile. Thus, reducing vendor lock-in should be a central component of a company's cloud strategy.

4.3 Provider origin and preferred provider locations

Which countries are your cloud providers based in, and which would you prefer?

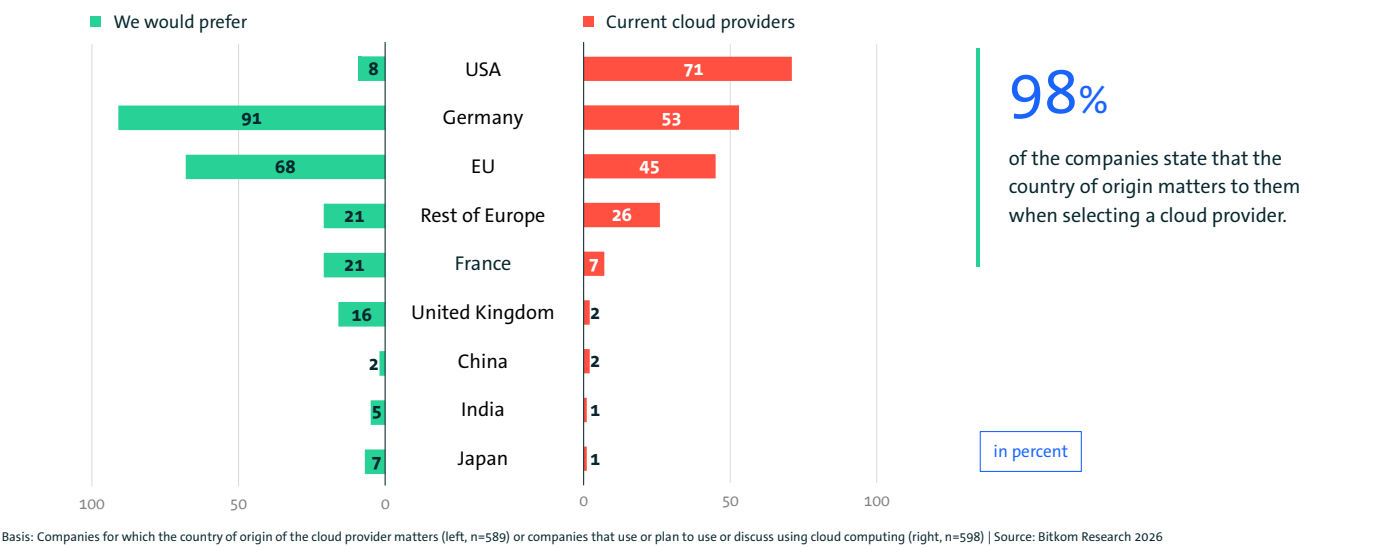


Figure 13: Current and Preferred Countries of Origin for Cloud Providers

Preference for Cloud Providers from Germany

For almost all companies that use or plan to use cloud services, the country of origin of the cloud provider is an important factor. 98 percent state that this criterion is relevant when selecting a provider.

However, there is a clear discrepancy between the current provider landscape and companies' preferences. 71 percent are currently using cloud offerings from providers based in the USA, but only 8 percent would prefer US-based providers. For German providers, the opposite is true: 53 percent are currently using providers from Germany, while 91 percent would prefer German providers.

Providers from the EU are also preferred more often than they are currently used: 45 percent are currently using EU providers, while 68 percent would prefer them.

4.4 Preferred Data Centre Locations

How would you assess the location of the data centres?

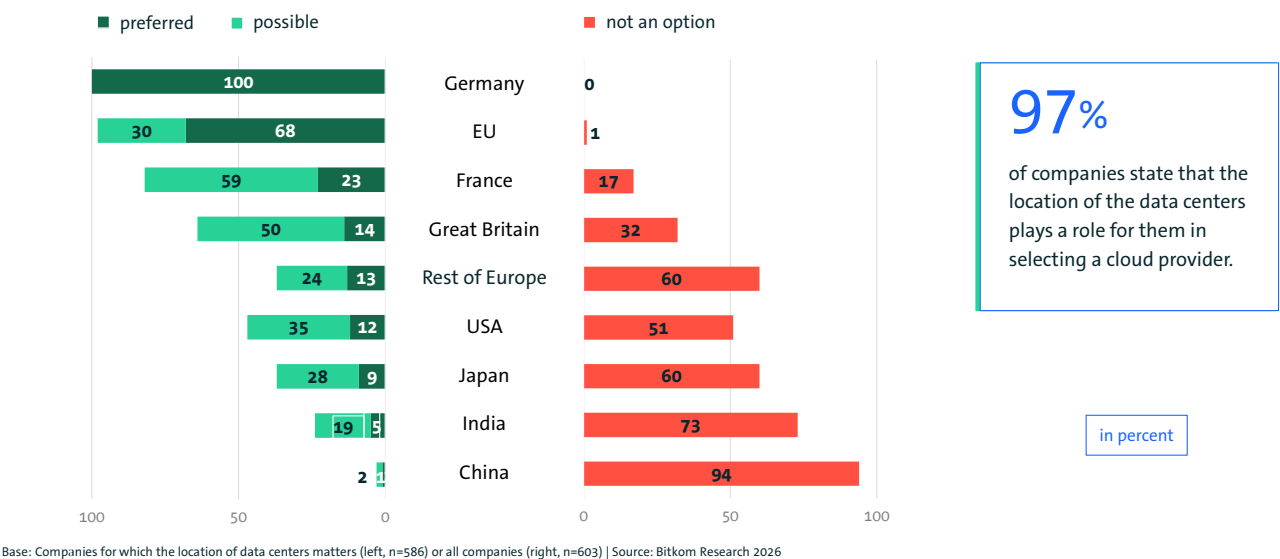


Figure 14: Preferred and Rejected Locations for Data Centers for Cloud Services

Everyone wants data centers in Germany or the EU

The location of data centres plays a central role for companies when choosing their cloud providers. 97 percent state that the location is relevant to their decision.

The preference for Germany is particularly pronounced: all companies surveyed would prefer a data centre location in Germany. Locations in other EU countries also enjoy broad approval at 68 percent.

Non-European locations, by contrast, are viewed much more cautiously. 12 percent would prefer data centres in the USA, while 51 percent rule them out. For India, 5 percent would prefer a data centre there, while 73 percent rule it out.

Acceptance of China is particularly low: only 1 percent would prefer a location there, while 94 percent rule out China.

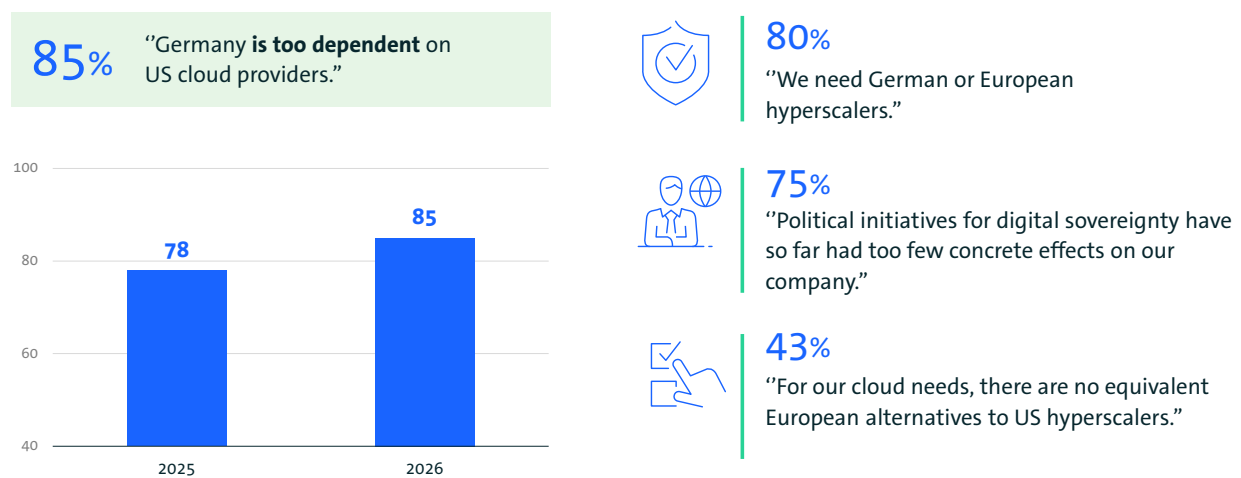
This indicates a clear preference for data processing in Germany and Europe.

5 Sovereign Cloud

5 Sovereign Cloud

5.1 Dependence on international cloud providers

Which of the following statements are true?



Base: All companies (n=603) | Multiple responses possible | Source: Bitkom Research 2026

Figure 15: Assessments of cloud dependencies and digital sovereignty

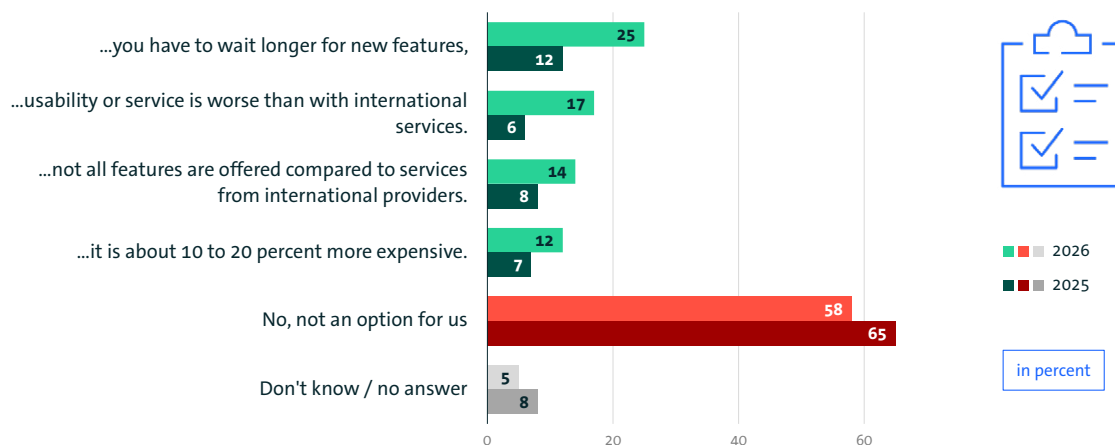
Companies see growing cloud dependencies

The German economy is becoming increasingly dependent on cloud services. 85 percent of companies believe Germany is too dependent on US cloud providers, up from 78 percent the previous year. Among companies using cloud services, 64 percent also state that current US policies are prompting them to rethink their cloud strategy, up from 50 percent the previous year [↗Dataverse](#). The desire for stronger German or European offerings is very pronounced: 80 percent of companies support the development of German or European hyperscalers.

At the same time, three-quarters of companies see too few tangible results from political initiatives aimed at strengthening digital sovereignty. 43 percent state that there are currently no comparable European alternatives to US hyperscalers that meet their cloud requirements.

5.2 Requirements for Sovereign Cloud Offerings

Would you be willing to use a cloud service that processes your data exclusively in Germany and protects it from access by foreign authorities, even if...



Base: All companies (n=603, 2025: n=604) | Multiple answers possible | Source: Bitkom Research 2026

Figure 16: Acceptance of potential drawbacks in sovereign cloud offerings from Germany

German cloud: companies are increasingly willing to accept disadvantages

The willingness to accept drawbacks in return for sovereign cloud offerings from Germany has increased significantly: 37 percent of companies would now be willing to use a cloud service that processes data exclusively in Germany and is protected from foreign access, even if this comes with some limitations. A quarter of companies would accept longer waiting times for new features; last year, the figure was only 12 percent. 17 percent would be willing to tolerate poorer usability or service. A further 14 percent would forgo certain features, while 12 percent would also accept a price increase of 10 to 20 percent.

As a result, issues of digital sovereignty and reducing one-sided dependencies are increasingly coming to the fore. Cloud infrastructure, especially in relation to AI and data, is becoming a strategic foundation for the German economy.

5.3 Use, Promotion and Transparency of Cloud Services

Which of the following statements do you agree with?



Base: All surveyed companies (n=603) | Multiple responses possible | Source: Bitkom Research 2026

Figure 17: Companies' Expectations for the Use, Promotion, and Transparency of Sovereign Cloud Offerings

Greater commitment to sovereign cloud is needed

Companies have clear expectations of government when it comes to expanding sovereign cloud offerings. 90 percent believe that public authorities should make greater use of European or sovereign cloud solutions; 79 percent see government as a pioneer in the use of such offerings. At the same time, 74 percent consider government initiatives to strengthen European cloud infrastructures necessary, while only 30 percent consider current political support sufficient.

Companies also see a significant need for action on transparency and regulatory clarity: 87 percent say that sovereign cloud offerings from international providers lack sufficient transparency regarding data processing and access rights. 53

percent find the legal and regulatory requirements unclear or inconsistent, while 51 percent criticise the lack of uniform European quality seals or certifications.

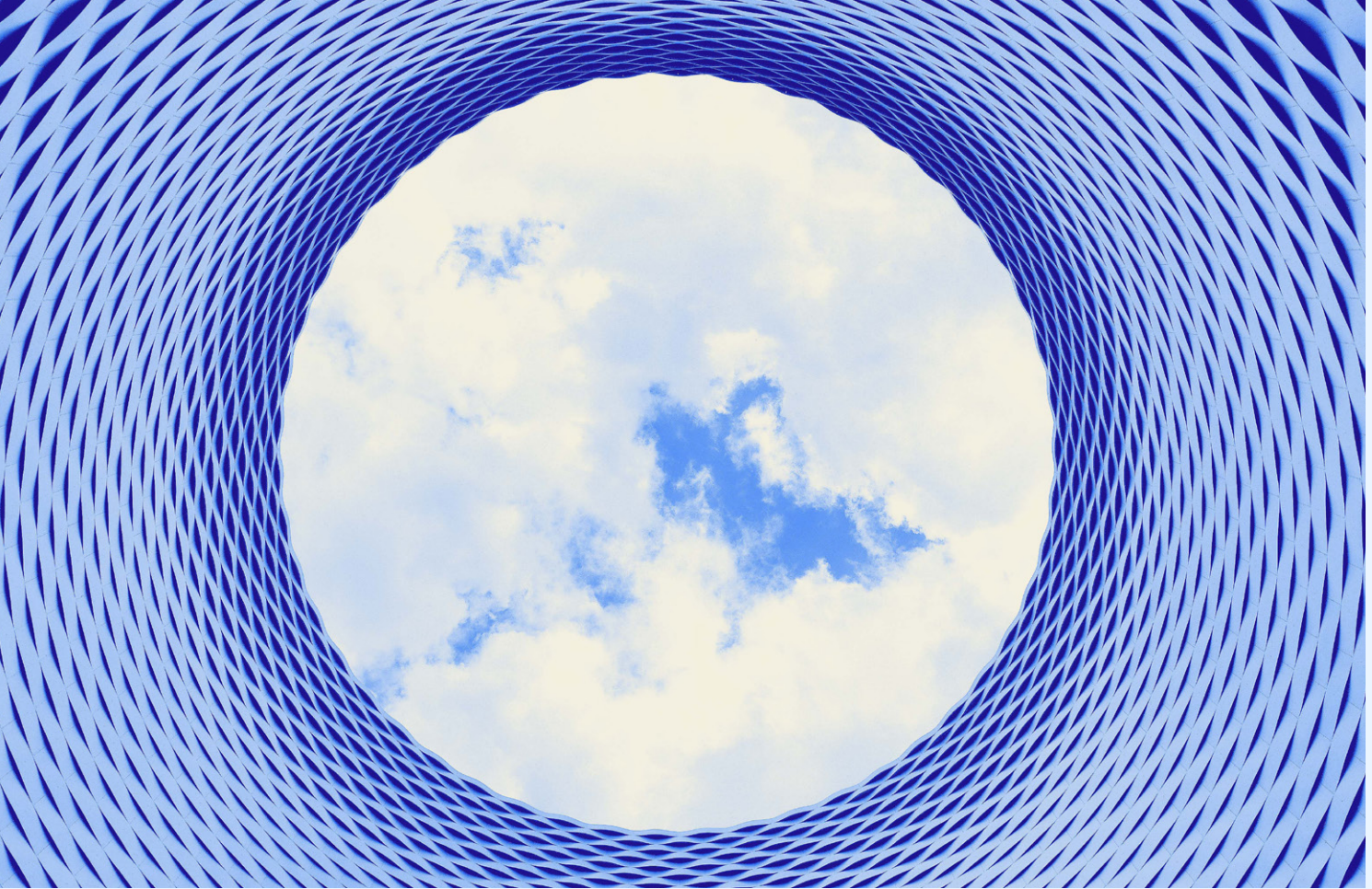
Cloud sovereignty thus requires binding standards, transparent offerings and government to take a stronger lead as a user of sovereign cloud services.

6 Conclusion and Recommendations

The Cloud Report 2026 shows that cloud computing has become standard across the German economy and is simultaneously entering a new phase of maturity. 86 percent of companies are already using cloud computing, with another 14 percent planning or discussing its adoption. The extent of cloud usage is also set to grow: the average share of cloud-based applications is expected to increase from 47 percent in 2025 to 58 percent over the next five years. Thus, cloud computing is becoming increasingly integral to businesses' digital infrastructure, particularly for data-driven applications and artificial intelligence.

With broader usage, new management and strategic issues are coming to the fore. These include cost control, switching options and dependencies on individual providers. 64 percent of companies using cloud services report that their operating costs increased in 2025; for 2026, 54 percent expect costs to rise further. At the same time, switching cloud providers remains challenging for many: companies cite vendor lock-in as the biggest obstacle, followed by a lack of strategic need, the level of staff resources required and application complexity.

The tension is also evident when it comes to digital sovereignty: 98 percent of companies say that the country of origin of the cloud provider plays a role in their selection process. While US providers are predominantly used at present, companies would clearly prefer providers from Germany or the EU. Moreover, 85 percent state that Germany is too dependent on US cloud providers, and 80 percent support the development of German or European hyperscalers. However, the study also highlights the existing supply gap: 43 percent of companies report that there are currently no comparable European alternatives to US hyperscalers that meet their cloud requirements.



The Results Indicate:

For businesses, digital sovereignty does not mean isolation but the ability to make informed choices about cloud services, assess dependencies and remain able to act when needed. Companies should systematically integrate sovereignty requirements into their cloud strategy, architectural decisions, procurement and governance, for instance through clear responsibilities or tested procedures for switching providers. Initial guidance is provided by the ↗[Bitkom guide "Putting Cloud Sovereignty into Practice"](#), which outlines how companies can evaluate their critical systems, data and processes based on risk and derive concrete actions. Additionally, it is crucial for policymakers and providers to strengthen high-performance, transparent and competitive cloud offerings from Germany and Europe, enabling companies to use cloud, data and AI securely, sovereignly and with a focus on innovation.



Bitkom Guide:
↗[Putting Cloud
Sovereignty into Practice](#)

7 Methodology

Client	Bitkom
Methodology	Computer-Assisted Telephone Interview (CATI)
Population	Companies in Germany with at least 20 employees
Target Persons	Executive Management/CEO and Board; Head of Information Technology (CIO); Head of Technology (CTO); IT management position, e.g., IT Head, IT Director, Vice President IT, etc.
Sample Size	n=603
Survey Period	Week 14 to Week 20, 2026
Weighting	Representative weighting of the dataset based on the current business register of the Federal Statistical Office
Statistical Margin of Error	+/- 3 percent

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Cloud computing is standard in the German economy—and is becoming increasingly important strategically. The Bitkom Cloud Report 2026 shows how companies use cloud solutions, which applications will grow in significance in the future, and which factors are crucial when it comes to provider selection, costs, security, resilience and digital sovereignty. The report is based on a representative survey of 603 companies with 20 or more employees conducted by Bitkom Research.

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