

DEPENDENCY & RISK RATING — B2B Software (Office Productivity · Martech · Salestech) — March 2026

Dependency Score = technical lock-in + migration cost + data portability | Risk Score = CLOUD Act exposure + data sensitivity + GDPR compliance + geopolitical risk | ★ = best EU alternative | ✖ = illegal/non-compliant as flagged by an EU authority | \* = nuances detailed in the "Note" column

Category	Sub-category	Dependency Score (1-5)	Dependency Criteria	Risk Score (1-5)	Risk Criteria	Main Players (US / Global)	European Alternatives ✓	GDPR / CLOUD Act Note	Sources
OFFICE PRODUCTIVITY	Office Suite (Word Processing · Spreadsheet · Presentation)	5	Format lock-in (proprietary OOXML, Google APIs), full cross-app integration, high migration cost (training + file conversion), dependent plug-in ecosystem.	5	Microsoft and Google = US companies subject to the CLOUD Act. Contractual, financial and strategic data hosted on US infrastructure even via EU datacentres. No sovereignty guarantee.	Microsoft 365 Google Workspace	OnlyOffice (Lithuania) Infomaniak kSuite Nextcloud + Collabora OVHcloud + Collabora	⚠ CLOUD Act §2523: US authorities may compel access to data hosted by any US company, EVEN on EU servers. Contractual clauses are insufficient. OnlyOffice = AGPLV3 licence, self-hostable in the EU.	<a href="https://www.cnil.fr/microsoft-365-des-etats-unis-ent-usage">https://www.cnil.fr/microsoft-365-des-etats-unis-ent-usage</a>   <a href="https://ec.europa.eu/info/law/law-topics/data-protection_fr">https://ec.europa.eu/info/law/law-topics/data-protection_fr</a>   <a href="https://onlyoffice.com/fr/advantages/open-source.aspx">https://onlyoffice.com/fr/advantages/open-source.aspx</a>
	Professional Email & Calendar	5	Email history not easily portable (proprietary PST/MBX formats), corporate directory (Active Directory) = strong lock-in, CRM/ERP integrations via Exchange connectors.	5	Sensitive communications (M&A, HR, legal) hosted by US companies. CLOUD Act: DOJ/FBI can access emails without notifying the organisation. Industrial espionage risk.	Microsoft Exchange/Outlook Google Gmail for Business	Infomaniak kSuite Mail OVHcloud MXplan Tutanota for Teams Mailcow (open source, EU-hosted)	⚠ Proton = Swiss law, resistant to the CLOUD Act. OVHcloud = French company, subject only to EU law. Tutanota = native E2E encryption, German jurisdiction (GDPR-native).	<a href="https://proton.me/blog/ci-cloud-act">https://proton.me/blog/ci-cloud-act</a>   <a href="https://www.ovhcloud.com/fr/enterprise/products/hosted-private-cloud/sovereign-cloud">https://www.ovhcloud.com/fr/enterprise/products/hosted-private-cloud/sovereign-cloud</a>   <a href="https://tutanota.com/fr/secure">https://tutanota.com/fr/secure</a>
	Internal Messaging & Video Conferencing	4	Teams = integrated work hub (chat, calls, docs, apps). Conversation and file-sharing history. Strong behavioural dependency. Migration = loss of collaborative context.	4	Internal communication data sometimes strategic. Zoom = US. Teams = Microsoft (CLOUD Act). Recorded audio/video data stored on US servers. Surveillance risk.	Microsoft Teams Slack (Salesforce) Zoom Google Meet Cisco Webex	Tixeo (ANSI-certified ★) Wire for Business Livestorm Klaxoon Element (Matrix) *	✓ Tixeo = the only video-conferencing solution ANSSI-certified for sensitive meetings, guaranteed E2E encryption. Wire = Swiss law. "Element" = UK post-Brexit, Matrix open-source protocol, self-hostable.	<a href="https://www.asi.gov.fr/entreprise/products-certifies/">https://www.asi.gov.fr/entreprise/products-certifies/</a>   <a href="https://tixeo.com/fr/secure-video-conference/">https://tixeo.com/fr/secure-video-conference/</a>   <a href="https://wire.com/en/products/teams/">https://wire.com/en/products/teams/</a>
	Cloud File Storage & Sharing	4	Data accumulated over years, integrations with the office suite, network paths hard-coded in scripts. Large-scale migration (TB → PB). Dependency on sharing metadata.	5	Potentially highly sensitive corporate data (R&D, IP, contracts, finances). CLOUD Act applies even to Azure EU West or Google EU datacentres. Microsoft Corp = US company.	Microsoft OneDrive/SharePoint Google Drive Dropbox Box	Nextcloud (self-hosted or EU cloud) Tresorit (E2E encryption) OVHcloud Object Storage Infomaniak kDrive Cozy Cloud	⚠ Nextcloud hosted on Hetzner (DE) or OVH (FR) = maximally sovereign solution. Tresorit = client-side E2E encryption, zero-knowledge, Swiss/Hungarian jurisdiction.	<a href="https://nextcloud.com/fr/gigir/">https://nextcloud.com/fr/gigir/</a>   <a href="https://resorit.com/fr/cloud-chiffrement/">https://resorit.com/fr/cloud-chiffrement/</a>   <a href="https://www.ovhcloud.com/fr/object-storage/">https://www.ovhcloud.com/fr/object-storage/</a>
	Electronic Signature	3	Workflows integrated into CRM/ERP. Contract history within the platform. Migration possible via ZIP export of signed archives. Moderate lock-in.	3	Sensitive contractual data. DocuSign = US but EU presence. Legal value governed by eIDAS in Europe. Moderate CLOUD Act risk as data is less frequently targeted.	DocuSign Adobe Sign HelloSign (Dropbox)	Yousign (eIDAS-compliant) Connective (eIDAS-compliant) Signaturit (eIDAS-compliant) Universign DocuWare	✓ eIDAS Regulation guarantees the legal value of qualified EU signatures. Yousign, Connective, Signaturit = mature, GDPR-compliant solutions, EU-hosted. EU market well covered.	<a href="https://www.yousign.com/fr-fr/normalize">https://www.yousign.com/fr-fr/normalize</a>   <a href="https://digital-strategy.ec.europa.eu/en/policies/eidas-regulation">https://digital-strategy.ec.europa.eu/en/policies/eidas-regulation</a>   <a href="https://connective.eu/fr/">https://connective.eu/fr/</a>
	Project Management & Productivity (PM)	3	Data exportable in CSV/JSON. Behavioural dependency (workflows, automation). Migration cost = user adoption + reconfiguration of integrations.	3	Internal project data, roadmaps, decisions. Variable sensitivity. Monday.com = HQ Tel Aviv but AWS US. Atlassian = Australian, NASDAQ-listed, subject to US Securities Law.	Asana Monday.com Jira/Confluence (Atlassian) Notion Microsoft Project	Wimi (full suite) Jalios Planisware Easy Project Taiga (open source) OpenProject (open source)	✓ Wimi and Jalios = France-hosted, SecNumCloud-certified (Wimi). OpenProject and Taiga = open source, self-hostable. Planisware = PMD/portfolio specialist, EU leader in this segment.	<a href="https://wimi-teamwork.com/fr/secure/">https://wimi-teamwork.com/fr/secure/</a>   <a href="https://www.jalios.com/fr/gtd/">https://www.jalios.com/fr/gtd/</a>   <a href="https://openproject.org/docs/privacy/">https://openproject.org/docs/privacy/</a>
OS & SYSTEMS	Desktop OS (B2B Workstations)	5	Migrating an entire estate = multi-year project (hardware requalification, application compatibility, training). Integrated Active Directory reinforces lock-in. Every line-of-business app must be retested.	4	Windows = massive telemetry sent to US Microsoft servers (diagnostics, usage, identity). CLOUD Act applicable. macOS = Apple Inc. US. ChromeOS = Google US. Corporate data exposed.	Microsoft Windows macOS (Apple) ChromeOS (Google)	SUSE Linux Enterprise openSUSE (open source) Linux Mint Ubuntu LTS (Canonical) Debian (community, EU-hosted)	⚠ Ubuntu = Canonical Ltd (United Kingdom, post-Brexit), outside strict EU law but outside CLOUD Act. SUSE = 100% German, the only desktop enterprise OS with full EU commercial support. Linux migration = compatible if app estate is web-first.	<a href="https://www.suse.com/fr-fr/products/suse-linux-enterprise-desktop/">https://www.suse.com/fr-fr/products/suse-linux-enterprise-desktop/</a>   <a href="https://www.linuxmint.com/">https://www.linuxmint.com/</a>   <a href="https://www.ubuntu.com/enterprise">https://www.ubuntu.com/enterprise</a>   <a href="https://www.bs.bund.de/EN/Topics/IT-Security-Situation/Recommendations/Operating-Systems/operating-systems.html">https://www.bs.bund.de/EN/Topics/IT-Security-Situation/Recommendations/Operating-Systems/operating-systems.html</a>
	Mobile OS (B2B Smartphones & Tablets)	5	Total dependency on the Apple ecosystem (App Store, Apple Business Manager MDM) or Google (Google Workspace, Play Store). Every mobile line-of-business app must be available on the target platform.	5	iOS and Android = mass behavioural data collection. Apple Inc. and Google = US. CLOUD Act. MDM (Mobile Device Management) solutions rely on US APIs. Maximum sovereignty risk on devices.	Android (Google) iOS (Apple) Android Enterprise (Google)	Sailfish OS (Jolla) ★★ /e/OS - Murena (de-Google Android) Ubuntu Touch (UBports) PureOS (Purism) *	⚠ Sailfish OS = Finnish, used by several EU ministries (France, Germany). /e/OS = Android fork without Google trackers, hosted in France. *PureOS = Purism is US but open source. Alternatives still limited on the business-app side.	<a href="https://jolla.com/sailfishos-enterprise/">https://jolla.com/sailfishos-enterprise/</a>   <a href="https://murena.com/fr/entreprise/">https://murena.com/fr/entreprise/</a>   <a href="https://ubports.com/">https://ubports.com/</a>   <a href="https://www.asi.gov.fr/entreprise/reglementation/secure-des-systemes-dinformatique/">https://www.asi.gov.fr/entreprise/reglementation/secure-des-systemes-dinformatique/</a>
MARKETING	Marketing Automation & Email Marketing	4	Contact base integrated into flows, templates, scoring, send history. Migration = loss of segments, automations and full history. Strong API dependencies.	4	Prospect/customer data (emails, behaviours, interests). US/EU transfers problematic post-Schrems II. CLOUD Act applicable to HubSpot, Mailchimp, Adobe, Salesforce.	HubSpot Marketing Hub Mailchimp (Intuit) Marketo (Adobe) ActiveCampaign Pardot (Salesforce)	Brevo (ex-Sendinblue) ★★ Acitio Dolist Sarbacane Inxmail	✓ Brevo = undisputed EU leader. France/Germany servers. >500K clients. Acitio = 100% Belgian, retail/B2C focus. ⚠ Mailjet = acquired by Sinch (Sweden) in 2023 → remains EU but subject to Swedish law.	<a href="https://www.brevo.com/fr/fr/legal/security-policy/">https://www.brevo.com/fr/fr/legal/security-policy/</a>   <a href="https://www.acitio.com/fr/secure-et-conforme/">https://www.acitio.com/fr/secure-et-conforme/</a>   <a href="https://inxmail.com/en/data-security/">https://inxmail.com/en/data-security/</a>
	Marketing CRM (Enterprise Cloud Marketing)	5	Maximum lock-in: proprietary data model, complex API, native ad analytics/lead integrations. Migration estimated at 12-24 months, cost of several million euros.	5	Enriched customer data (purchase behaviours, fine segmentation, lifecycle). All major platforms = US. CLOUD Act = ~65% market concentration at enterprise level. No EU equivalent.	Salesforce Marketing Cloud Oracle Marketing Cloud Microsoft Dynamics Mktg	Acitio (mid-market) CampusInsider Inxmail Enmaerys (Spilo)	⚠ Market ~95% dominated by non-EU players at enterprise level. No EU alternative matches the functional scope of Salesforce MC or Adobe EC to date. Acitio = best EU mid-market option. ⚠ Mapp removed: parent company Mapp Communications based in San Diego (US) since acquisition of Webtrek (DE) in 2018.	<a href="https://www.gartner.com/en/marketing/insights/email-marketing/">https://www.gartner.com/en/marketing/insights/email-marketing/</a>   <a href="https://www.acitio.com/">https://www.acitio.com/</a>   <a href="https://inxmail.com/en/data-security/">https://inxmail.com/en/data-security/</a>
	Web & Behavioural Analytics	4	Irreplaceable data history, tag configurations, custom dashboards. Migration = loss of history or double-tracking for 6-12 months. Strong dependency on data teams.	5	Google Analytics 4 declared illegal by the CNIL (Jan. 2022). Austrian DSB, Italian Garante. IP transfers to the US without consent. Fingerprinting. Fines possible.	Google Analytics 4 Adobe Analytics Mixpanel Amplitude Microsoft Clarity	Piano Analytics (AT Internet) ★ Matomo (open source, self-hostable) Comptiq Pwtk PRO Etracker	⚠ GA4 = non-GDPR-compliant according to several EU authorities without advanced configuration. Piano Analytics (and EU-hosted Matomo) = compliant without consent (CNIL recommendations). ⚠ Mapp/Webtrek removed: Webtrek (founded Berlin) acquired by Mapp Communications (San Diego) in 2018 → CLOUD Act applicable. Pwtk PRO = 100% Polish, EU servers.	<a href="https://www.cnil.fr/fr/la-issuance-de-google-analytics-et-transferts-de-donnees-vers-les-etats-unis">https://www.cnil.fr/fr/la-issuance-de-google-analytics-et-transferts-de-donnees-vers-les-etats-unis</a>   <a href="https://piano.com/fr/fr/products/analytica/">https://piano.com/fr/fr/products/analytica/</a>   <a href="https://matomo.org/gdpr/">https://matomo.org/gdpr/</a>

MARTECH	CDP (Customer Data Platform)	4	Unified data model = very difficult to migrate, customer identities reconciled over years. Numerous API dependencies (CRM, ads, web). Identity profiles not portable.	4	Unified customer data (first-party, CRM, web, advertising) = highly enriched profiles. All major CDPs = US. Major sovereignty issue over the company's unified customer base.	Segment (Twilio) mParticle Tealium Adobe RT-CDP Salesforce CDP	Commanders Act  ★ Actio CDP Siplica/Meteoronline Pivik PRO	⚠ CDP market highly concentrated on the US side. Commanders Act = mature French solution (integrated TMS + CDP). Pivik PRO = Polish, strong on analytics + CDP. Few complete EU enterprise alternatives.	<a href="https://www.commandersact.com/fr/resolution/customer-data-platform/">https://www.commandersact.com/fr/resolution/customer-data-platform/</a>   <a href="https://pivik.pro/fr/platforme-e-analytics-marketing/">https://pivik.pro/fr/platforme-e-analytics-marketing/</a>   <a href="https://iplico.com/fr/">https://iplico.com/fr/</a>
	Consent Management (CMP / Consent)	2	CMP migration = banner reconfiguration + export of consent proofs. Moderate timeframe (1-2 months). Little strong technical lock-in as data is exportable.	3	CMP = legal gateway for all data processing. OneTrust = US but strongly EU-compliance-oriented. High GDPR stakes: a poorly configured CMP exposes organisations to significant fines.	OneTrust TrustArc Quantcast Choice Usercentrics	Didomi  ★ Axeptio Cookiebot (Cybot) Sirdata Iubenda	✅ One of the categories with the most mature and competitive EU alternatives. Didomi, Axeptio = French leaders. Cookiebot = Danish benchmark. *Usercentrics = German, maintained in Munich.	<a href="https://www.didomi.io/fr/conformite-rgpd/">https://www.didomi.io/fr/conformite-rgpd/</a>   <a href="https://www.axeptio.eu/fr/">https://www.axeptio.eu/fr/</a>   <a href="https://www.cookiebot.com/fr/igdr/">https://www.cookiebot.com/fr/igdr/</a>
	CMS & DAM (Content & Asset Management)	3	CMS migration = complex (templates, content, redirects) but achievable in 3-6 months. DAM = stronger lock-in on metadata and workflows. Moderate dependency.	3	Editorial data and marketing assets. Moderate sensitivity. Adobe AEM = US. Contentful = founded in Berlin but legal entity in Delaware (US).	Adobe Experience Manager Contentful  / WordPress.com (Automatic) Sitecore  **	Pimcore  ★ Kentico/Experience Ibexa DXP Magnolia CMS TYPO3  (open source) Strap  (headless)	⚠ Contentful = founded in Berlin but HQ + legal entity in the USA (Delaware) → CLOUD Act applicable. Sitecore = Danish origin but acquired by US investors (2021). Pimcore, Ibexa, Kentico = 100% EU.	<a href="https://pimcore.com/en/resources/igdr/">https://pimcore.com/en/resources/igdr/</a>   <a href="https://www.ibexa.com/">https://www.ibexa.com/</a>   <a href="https://www.magnolia-cms.com/fr/platforme-secure-et-conformite.html">https://www.magnolia-cms.com/fr/platforme-secure-et-conformite.html</a>
	Advertising & DSP (B2B Programmatic)	5	Algorithmic lock-in: bids, audiences and performance history tied to the platform. Switching = loss of machine learning (e.g. Google Smart Bidding). Committed budgets non-recoverable.	5	⚠ Google/Meta duopoly on ~80% of the digital advertising market. Record GDPR fines: Meta Ireland = €1.2bn (2023). Google = €150M CNIL (2022). Behavioural data collected at scale.	Google Ads / DV360 Meta Ads The Trade Desk Xandr (Microsoft) Amazon DSP	Equativ (Smart AdServer) Teads Ogury Azerion 33Across  *	⚠ Equativ and Teads = EU alternatives on SSP/DSP but do not replace Google/Meta volumes. EU advertising market structurally dependent on GAFAM. DMA regulation may alter the landscape.	<a href="https://www.cnil.fr/fr/google-e-sanction-150-millions-euro-cs">https://www.cnil.fr/fr/google-e-sanction-150-millions-euro-cs</a>   <a href="https://edp.blogs.europa.eu/news/real-coin/news/2023/08/28-awards-decision-meta-instagram_fr">https://edp.blogs.europa.eu/news/real-coin/news/2023/08/28-awards-decision-meta-instagram_fr</a>   <a href="https://www.equativ.com/fr/">https://www.equativ.com/fr/</a>
SALESTECH	CRM (Customer Relationship Management)	5	Maximum lock-in: customer data, full interaction history, workflows, ERP/marketing/support integrations. Migration = minimum 6-18 months. Risk of losing relational data.	5	Customer database = major strategic asset. Salesforce/Microsoft/HubSpot = CLOUD Act. US authorities can access the entire sales database without notification.	Salesforce CRM Microsoft Dynamics 365 HubSpot CRM Oracle CX Zoho CRM  **	Efficacy CRM  ★ Selly Teamleader Eudonit Divalto SAP CRM  **	⚠ Zoho = Indian, outside the CLOUD Act but not EU. **SAP = German (EU alternative) but very complex/costly, poorly suited to SMEs/mid-market. Efficacy and Teamleader = EU mid-market leaders. Selly = focus on French SMEs.	<a href="https://www.efficacy.com/fr/conformite-rgpd/">https://www.efficacy.com/fr/conformite-rgpd/</a>   <a href="https://www.selly.com/fr/fonctionnalites/secure/">https://www.selly.com/fr/fonctionnalites/secure/</a>   <a href="https://www.teamleader.fr/secure/">https://www.teamleader.fr/secure/</a>
	Sales Intelligence & B2B Prospecting	4	Prospect lists, enrichments, CRM integrations. Personal data not easily portable. Dependency on data quality and freshness. LinkedIn = de facto monopoly on B2B data.	4	B2B personal data (emails, phone numbers, job titles, org charts). LinkedIn = Microsoft (CLOUD Act). ZoomInfo = US. GDPR issues: lawfulness of processing under legitimate interest (Art. 6f).	LinkedIn Sales Navigator ZoomInfo Apollo.io Cognism  * Lusha	Corporama  ★ Nomination Kompass Kaspr Pharow Dropcontact Decidento	⚠ Cognism = UK post-Brexit, subject to UK law (UK GDPR). Kaspr, Dropcontact, Pharow = fast-growing French alternatives, EU data only, opt-out built in. Kompass = 100 years of existence.	<a href="https://www.kaspr.io/fr/rgpd/">https://www.kaspr.io/fr/rgpd/</a>   <a href="https://www.dropcontact.com/fr/rgpd/">https://www.dropcontact.com/fr/rgpd/</a>   <a href="https://www.corporama.com/fr/donnees">https://www.corporama.com/fr/donnees</a>
	Sales Engagement (Sequences + Coaching + Conversation)	3	Email/phone sequences integrated with the CRM. Templates, engagement analytics. Migration possible but loss of performance benchmarks and sequence history.	3	Commercial communication data, call recordings (conversation intelligence). Outreach/SalesLoft = US. Moderate risk on sensitive commercial data.	Outreach Salesloft Apollo.io Chorus.ai (ZoomInfo) Gong	Modjo  ★ (conversation intelligence) Ringover  (telephony + engagement) Lemlist  (cold email) La Growth Machine Surfe	✅ The category best covered by mature French alternatives. Modjo = EU conversation intelligence leader. Lemlist = 10,000+ clients. Ringover = GDPR-native, certified EU hosting.	<a href="https://www.modjo.ai/fr/secure/">https://www.modjo.ai/fr/secure/</a>   <a href="https://www.ringover.fr/secure-rgpd/">https://www.ringover.fr/secure-rgpd/</a>   <a href="https://lemlist.com/fr/rgpd/">https://lemlist.com/fr/rgpd/</a>
	CPQ (Configure, Price, Quote)	4	Product catalogues, complex pricing rules, ERP/CRM integration. Strong lock-in as business logic is fully encoded within the platform. Migration = complete rewrite of rules.	3	Pricing, margin and quote data. High commercial sensitivity but more limited CLOUD Act exposure (data less frequently targeted by US authorities).	Salesforce CPQ Oracle CPQ Conga (Apttus) SAP CPQ  **	Selly  (integrated CPQ for SMEs) Axonaut Tikee  (quote tracking) DealHub  ** SAP CPQ  **	⚠ *SAP CPQ = German (EU alternative) but complex/costly. **DealHub = Israeli, not EU. The standalone EU CPQ market remains immature. Selly and Axonaut cover the SME/mid-market segment.	<a href="https://www.selly.com/fr/fonctionnalites/davis-facturation/">https://www.selly.com/fr/fonctionnalites/davis-facturation/</a>   <a href="https://www.axonaut.com/fonctionnalites/davis/">https://www.axonaut.com/fonctionnalites/davis/</a>   <a href="https://sap.com/fr/products/cpq.html">https://sap.com/fr/products/cpq.html</a>
	Telephony & Call Centre (CaaS / VoIP)	3	Phone numbers (EU-regulated portability), call history, CTI-CRM integrations. Migration = number portability possible (approx. 4-week delay). Risk of service interruption.	3	Call recordings, potential biometric voice data. Genesys/Avaya = US. GDPR issues around consent to recording and localisation of voice data.	Genesys Avaya Cisco (Webex CC) Zendesk Talk NICE inContact	Ringover  ★ Odigo Dialogocon Vocalcom Enghouse Interactive	✅ EU telephony market well covered. Ringover, Odigo, Vocalcom = GDPR-native solutions, EU hosting. Number portability guaranteed by EU Directive 2002/21/EC. Enghouse = Swedish, strong EU presence.	<a href="https://www.ringover.fr/secure-rgpd/">https://www.ringover.fr/secure-rgpd/</a>   <a href="https://www.odigo.com/fr/secure/">https://www.odigo.com/fr/secure/</a>   <a href="https://enghouseinteractive.fr/">https://enghouseinteractive.fr/</a>