Open Letter: European Industry Calls for Strong Commitment to Sovereign Digital Infrastructure

14 March 2025

Dear President Von der Leyen,
Dear Executive Vice-President Virkkunen,

The recent Munich Security Conference, subsequent US-announced measures and further developments in US/EU relations have exposed the stark geopolitical reality Europe is now facing.   Building strategic autonomy in key sectors is now a recognised urgent imperative across Europe. As part of this common effort, **Europe needs to recover the initiative, and become more technologically independent across all layers of its critical digital infrastructure:** from logical Infrastructure - applications, platforms, media, AI frameworks and models - to physical Infrastructure - chips, computing, storage and connectivity. Europe's current multiple dependencies create security and reliability risks, compromise our sovereignty and hurt our growth.

It has been clear for some time that Europe **cannot regulate itself out of its laggard position**. It needs to take proactive industrial action: it has enormous talent, capabilities, assets and business record in the digital space, but the legacy of our structural fragmentation (as described in the Draghi report) have led our Continent to fall significantly behind the US and China. Even with the positive announcements at the Paris AI Action Summit, Europe will lose out on digital innovation and productivity growth without sweeping and urgent change – our reliance on non-European technologies will become almost complete in less than three years at current rates.

It is time for radical action.

This diagnosis is well understood and has been clearly set out by the **EuroStack initiative[1],** which over the past six months has championed a major effort to support digital sovereignty and spearheaded the call for a bigger role for European industry in our digital supply chains.

The signatories to this letter are diverse European businesses and associations which share the EuroStack assessment, and in particular its vision for an industry-led effort. We encourage you and the Commission to engage actively with this effort. What business needs is a pragmatic **industrial policy strategy to reduce our dependencies in critical technologies, while focusing on selected initiatives to overcome Europe's structural challenges – fragmentation, suppression of local demand, focus on research rather than productization, lack of adequate capital – to promote productivity growth and security.** Not

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[1] The "EuroStack Initiative" is steered by a volunteer, non-lobby, unpaid collective of technologists and economists, supported by multiple constituencies from industry to associations to think tanks to civil society. The Initiative published an initial overview pitch paper in January: *EuroStack: European Strategic Sovereign Digital Infrastructures*. Since then, a number of further related reports and initiatives have grown out of the original idea (see also EuroStack – A European Alternative for Digital Sovereignty), reflecting the shared sense of urgency now felt across Europe.

just funding of R&D initiatives, but supporting European industry to gain relevance in supplying European (and global) needs.

We call on your convening powers to mobilise industry to *actively* help coordinate and validate a continent-wide strategy to power a European digital sovereign effort. To support Europe in this acute moment of crisis for our security and strategic autonomy, the Commission must **urgently form and convene working groups with industry to transform its tech sovereignty ambition into concrete actions.**

Immediate goals need to include:

● **Creating demand –** industry will invest if there are adequate demand prospects. The business case for investment must be supported by clear, objective and strong procurement obligations - with a formal requirement for the public sector to **"Buy European"** – i.e. source their needs from European-led and assembled solutions (while recognising these may involve complex ecosystems and supply chains). The private sector needs appropriate incentives and inducements to steer a portion of their demand towards European suppliers enabling sovereign solutions. **Prioritising areas where Europe can already deliver** will be key to shifting resources fast to European suppliers, creating value and market in a virtuous circle. The aim is not to exclude non-European players, but to create space where European suppliers can legitimately compete (and justify investment).

● **Create viable supply by supporting a "pooling and federating" approach and common industry standards** that can deliver scaled European alternatives – working closely with industry to virtually pool and leverage existing dispersed assets and solutions in core areas into coherent networked, accessible and commercially available offerings. This means again working with industry to inventory resources fast, supporting open source solutions and interoperability (both technically and commercially), aggregating "best of breed" existing assets, supporting onboarding with integration platforms and low compliance barriers – while meeting localization and security imperatives. **Priority must be given to projects that address basic infrastructural needs,** such as hardware autonomy and sovereign cloud and platforms. With non-European corporations extracting value and concentrating power through proprietary technologies, "openness" (open science, standards, data) should be a pillar of Europe's digital sovereign strategy.

● **Prioritise services with strong adoption prospects,** meeting real needs such as satisfying cybersecurity objectives. Again working with industry, select interventions and measure results in terms of business outcomes. Business Drivers (BD), Critical Success Factors (CSF), and Key Performance Indicators (KPI) must be defined for every funded project, based on market impact. Participants to funded projects must be selected based on their ability to contribute assets, willingness to share them in a federated model, and commitment to be rewarded based on measurable market results.

● **Develop harmonized requirements (e.g. a certification scheme) for public/private cloud users to opt (on a voluntary basis) for sovereign cloud services for their**

sensitive data. For the successful uptake of Cloud, data spaces and AI, European cloud users must be able to ensure that their most sensitive data are protected against access or operational disruption arising from non-EU extraterritorial laws. This should be naturally addressed at EU level, and the **European Cloud Services Cybersecurity Certification Scheme (EUCS) should be augmented to High+ criteria** (or EUCS should be kept on hold until an adequate alternative solution is found).

On funding:

- **Review and repurpose existing plans under the Digital Decade initiative**, reassigning funds where appropriate and prioritizing tangible, market relevant, result-oriented projects.

- **Create a Sovereign Infrastructure Fund to support public investments,** particularly in the capital-intensive parts of the value chain (e.g. quantum and chips) with significant additional commitment of funds allocated and/or underwritten by EIB and national public funding bodies. Complement existing initiative (like STEP Seal) by consulting with philanthropic VCs, national innovation/funding institutions, as well as national sovereign funds, to create a coordinated sense of purpose and development (not just innovation). Consider the creation of a "European Dynamism Fund of Funds".

We support EuroStack's emphasis on **industry's leadership** in delivering, pooling and governing European infrastructure.

Time is of the essence, and industry is prepared to invest if there are conditions for viable returns. Together we must create a reliable, open infrastructure which supports offering solutions that cannot be built in today's captured digital economy. We stand ready to meet you to discuss this plan.
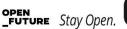
Signatories

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Aie Cyberseguridad

Airbus

AMS-IX

APELL

Aruba

BASSCOM

BITMi

BPI France

brighter AI Technologies

Bulgarian Angels Club

CEAPME

Clarence

Clastix

Cleura

Clevercloud

Cluj IT

CNLL

Comply Market UG

CONETIC

Confimi Industria Digitale

Connect Europe

Coton.

CRM Partners

Cubbit

CyberCert Labs

Dassault Systèmes

Dynamo Cloud

eCapital

Ecosia

ECSO

EdTech Bulgaria

E Foundation

Elastx

Element

Elemento

Euclidia

European AI Forum

European DIGITAL SME Alliance

European Software Institute

European Startup Network

Evroc

ExpertAI

Factor10

Factory 4.0

German AI Association

German Center for Open Source AI Software

German Startup Association

GetYourGuide

Grün Software AG

HUB France IA

Human Colossus

iconomy

Innovate Europe Foundation

IONOS

Italian Tech Alliance

Iver

Kalray

Kharkiv IT Cluster

Leaders for Climate Action

Lemonsgate

Matrix Internet

Merantix

Molnett

Murena

Nemetschek Bulgaria

NextCloud

Open Future EU

Open-Xchange

OSBA (Open Source Business Alliance)

OVH Cloud

Panopli

Planet A Ventures

Pleias

351 Portuguese Startup Association

Probabl ai

Proton

Proxima Fusion

Redpill Linpro

Safespring

Scaleway

Sdwan Solutions

Secunet

Secure Practice

Seeweb

Shift Phone

SiPearl

Sopra Steria

Sunrise Tech Park

Swiss Cyber CO

Tecnalia

Univention

VATES

WEtell

Zenabyte

ZENIT

Additional Industry Signatures Supporting EuroStack

4 April 2025

schwarz digits

#cnetz   abilian   ANONYMISED   AI4SMB

Babylon CLOUD   CanaryBit   Cloudpush   CoLearnAI Kft.

CONFIDENTIAL Mind   Cytech mobile solutions   .DATJOBU   datafelix

DEI   digitalist. CLOUD   Dilolabs   DIMTECH 3D

DOCAPOSTE   EUROPEAN CLOUD CAMPUS   Evolveum   FACTOR HUMANO FORMACIÓN

GFOSS OPEN TECHNOLOGIES ALLIANCE   Greenhouse Group   hiro Edge Micro Data Centers   #IDEA

ignite   invantive the SQL company   KEYLESS   leaseweb reliable cloud

Legit   LINAGORA   Logiicdev   MBRYONICS   MeMOM software for manufacturers

minervas   montimage   MotionsCloud   NBIP

OVERNET. upgrade your digital skills   PROMETHEUS-X   publicplan.   QBOXMAIL

quintessence research   RUNWAY   SENSATIVE

several9s   SHEMHA HEALTH   SILENTWAVE

SMILE I.T IS OPEN   Solvership   Soverin.   startup disrupt

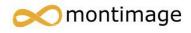The Good Cloud   vtenext   Workers Badge blockchain credentials   SAFEHOUSE Making IT, OT & IoT Safe

Additional Industry Signatures Supporting EuroStack
4 April 2025

#cnetz e.V.

Abilian

AGT Digital Hair Tech 3D

AI4SMB - AI 4 SMBs

Anonymised

Babylon Cloud

CanaryBit

Cloudpush

CoLearnAI

Confidential Mind

Cytech

Daijobu AI

Datafelix

DEI

Digitalist

Dilolabs

Docapost

E-Mod

European Cloud Campus powered by Leaseweb

Evolveum

FACTOR HUMANO FORMACION S.L

Greenhouse Group AB

Hiro-EdgeMicroDataCenters BV

IDEA TSG

Inigte Video

Invantive B.V.

Keyless

Leaseweb

Legit

Linagora

Mbryonics Ltd

MeMOM

MEDITERRANEO LAB 4.0 SRL

MinervaS s.r.l.

Montimage

MotionsCloud

NBIP

Open Technologies Alliance GFOSS

Overnet

Prometheus-X

Public Plan

Qboxmail

Quintessence Research B.V.

Runway (by Planetary Quantum GmbH)

Schwarz

Sensative AB

Severalnines AB

Shemha Health

SilentWave

Smile Group

Solvership

Soverin

Startup Disrupt

The Good Cloud

VTENEXT SRL

Zafehouze ApS

Additional Industry Signatures
Supporting EuroStack
30 April 2025

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30 April 2025

2021.ai

ACCOLADES

ACT-Europe e.V.

ANHALT INTELLIGENCE - Reliable AI

Apalosa

AppliedAI

ArQiver B.V

ArQiver instance

bifrost security

Crayonic

CyberSolace Limited

Deepwater Digital Sp. z o.o.

deltaDAO AG

DER SEMINAR - Homeoffice Cloud for Enhanced Security

Devs bot

Dutchcode

ePAPHOS ADVISORS TEAMWORK

EU FED Cloud

Europen Crypto Initiative

Hall-Tech Consulting

HarfangLab

HashNET

Hopsworks

InfoLink Limited

Institute of Network Cultures

Katalysen Ventures AB

KDE e.V.

Klang.ai

MainStreaming SpA

Mastodon

Mélodium

Mosa.Cloud

Myra Security GmbH

NAP Labs

nicnac

Outfox

pi-lar enterprise architects

Qarnot computing

Reverentia Management AB

Romanian Tech Startups Association

RS Strategy

SKS Knowledge Services

Tab Consulting srl

Techcelerator

TELLgen Srls

The House of Ethics™

TITAN

University of Oulu

Vantiva

Zzapps

Additional Industry Signatures
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June 2025

ALEPH ALPHA

Adfinis

ADV·TEAM
CONSULTING · TECHNOLOGY · OUTSOURCING

astian

B1 SYSTEMS
Linux/Open Source
Consulting, Training,
Managed Service & Support
b1-systems.de

B2cloud

CLOUD TEMPLE
innovative by design

cortecs

DECODED

drop solid
DIGITAL
EXPERIENCE
COMPANY

Dutch Cloud
Community

ecov

EPITA
ÉCOLE D'INGÉNIEURS EN INFORMATIQUE

EPN
EUROPEAN PUBLIC NETWORK

eulerian.

Evolveum

EXOSCALE

GHOST LABS

HYPRA
GÉNÉRATEUR DE PUISSANCE D'AGIR

itsl solutions

Jamespot

jotne connect

Logilab

meta solutions

MIDORI

midPoint

mividas

MYCRONIC

nexos.ai

NitroAgility

OS

OSISM

PeoplMap
You will never work alone

Polska Chmura

Quodari

Rapid Application Development

rhapsodies conseil

Signaloid

Simple Analytics

stratedge

the silver lining project

TIMELAB

X-WIKI

worteks
make IT work, make IT free

Additional Industry Signatures Supporting EuroStack 13 June 2025

Adfinis

Advyteam (PeoplMap)

Aleph Alpha

Astian

B1 Systems GmbH

B2CLOUD

Cloud Temple

Cortecs

CryptPad

DECODED WORLD ENTERPRISE

Drop Solid

Dutch Cloud Community

Ecov

EPITA

Eulerian Technologies

European Public Network e.V.

Evolveum

EXOSCALE

GhostLabs

HYPRA

ITSL Solutions AB, Sweden

Jamespot

Jotne Connect

Logilab

MetaSolutions

Midori

midPoint

Mividas

MYCRONIC

nexos.ai

Nitro Agility

OS Informatica

OSISM GmbH

PeoplMap – Advyteam (France)

Polska Chmura

Quodari

Radouga SA

Rhapsodies Conseil

Signaloid

Simple Analytics

Stratedge

The Silver Lining Project

Timelab Institute

Worteks

XWiki