



**Alternatives for European  
Digital Indipendence**

NEWS > FINANCIAL SERVICES

# Mario Draghi's plan to fix a broken Europe already looks impossible

The Draghi report is full of good intent. But while the vision is bold, the politics

# Exclusive: US could cut Ukraine's access to Starlink internet services over minerals, say sources

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of Polls Policy news Events

US COMPANIES TECH MARKETS CLIMATE

Trump tariffs + Add to myFT

## Donald Trump t



## balance goals

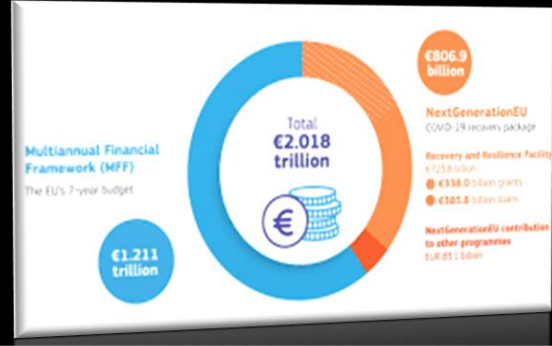


# EU Digital Decade 2020-2030 – What Happened so Far? ...



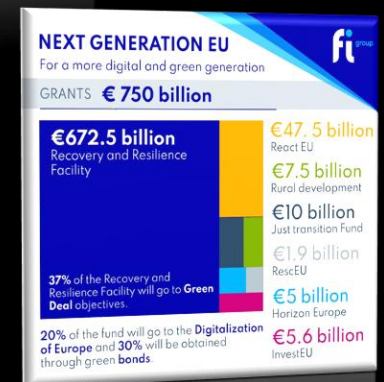
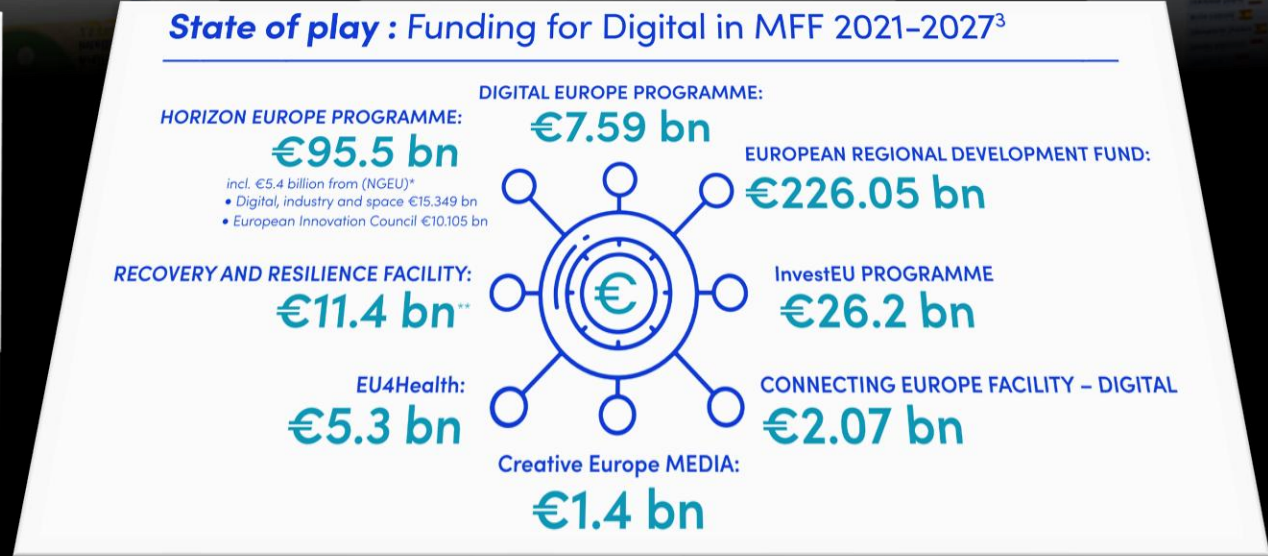
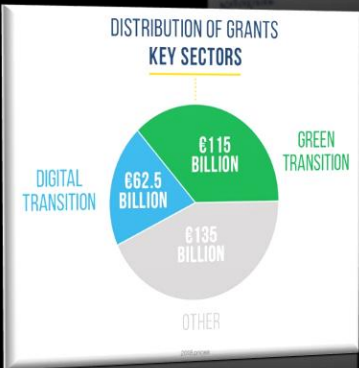
know them all?  
...what business outcome?...

# EU Digital Decade Investments – Too Small?



Commission approves up to €1.2 billion support by 7 Member States for an IPCEI on Next Generation Cloud Infrastructure and Services (IPCEI CIS)

Member State	Investment 1: Cloud-Edge Connected Infrastructures	Investment 2: Cloud-Edge Capabilities	Investment 3: Advanced smart data processing tools and services	Investment 4: Advanced Applications
Germany	100%	100%	100%	100%
France	100%	100%	100%	100%
Spain	100%	100%	100%	100%
Italy	100%	100%	100%	100%
Poland	100%	100%	100%	100%
Portugal	100%	100%	100%	100%
Sweden	100%	100%	100%	100%



**+200bn eur \***

200Bn eur=2M m/y SW dev=200K FTE for 10 years!!...  
...where are we spending it?...

\*: rough estimate

# So what EU need? ... some say:

01

**More Regulation ...**  
So we block Big-Tech and increase the EU market!

No! Deregulation made the Big-Tech big, we can't win with hyper-regulation

02

**More Investments in R&I ...**  
we need trillions, we invest too little compared to US!

Money is never enough, but No! We invest a lot, but in the wrong direction

03

**More Open-Source SW ...**  
yes, because it is free and democratic!

OSS is great and free, but without a commercial product built around it, you don't sell it!

04

**Infrastructure Interoperability ...**  
yes, in this way we can compensate lack of capacity!

Nice, but customers don't buy infra-interoperability, they want business solutions



# Are we addressing the right problem?



**Restrict and control US, or Grow EU providers?**

**Force a buy EU, or Enable EU competitiveness?**

**Achieve Digital Sovereignty, or Economic Resilience?**



# The Problem

# EU Cloud Market – The Demand

## EU CLOUD DEMAND

**GROWING**

**NO LOCK-IN**

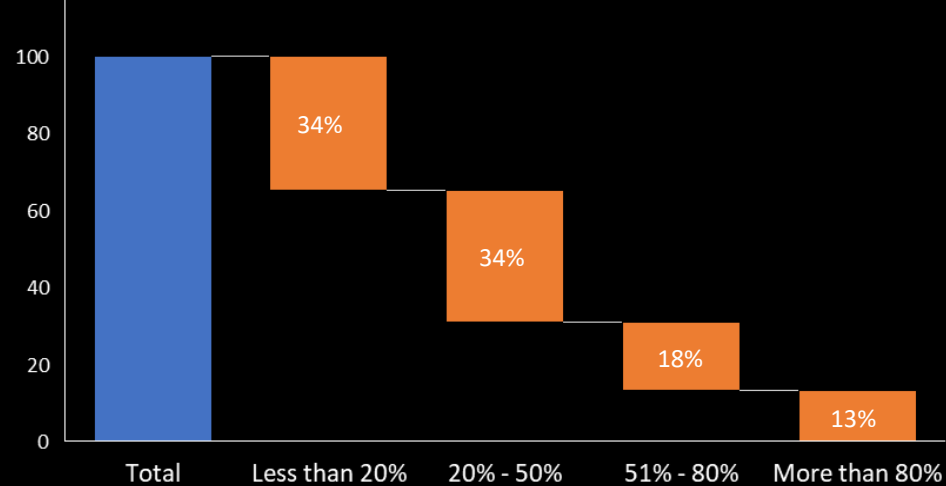
**DISTRIBUTED**

**PROTECTED**

**RESILIENT**

**SUSTAINABLE**

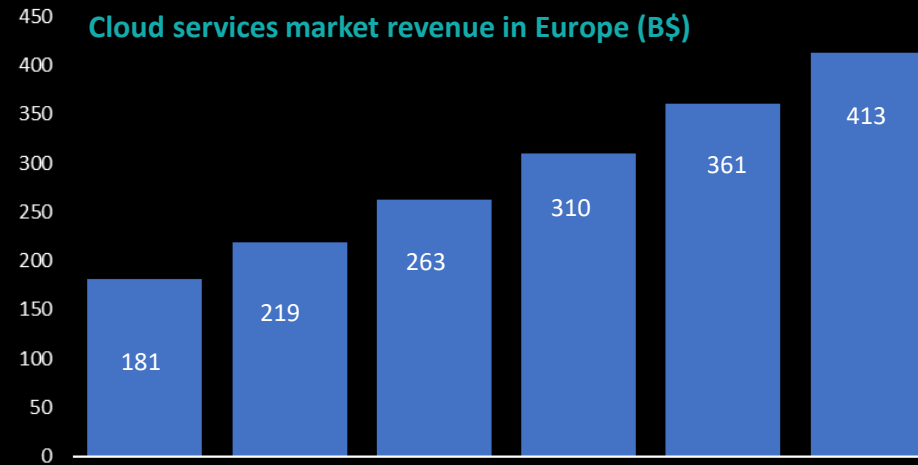
Share of Cloud workload on Cloud % of European Organizations (%)



Source: McKinsey & Company

**68%** of European organizations have <50% workloads on cloud

Cloud services market revenue in Europe (B\$)



**2x** Market value by 2028. The Cloud Services market is continuously expanding!

# EU Cloud Market – The Supply

## EU CLOUD SUPPLY

### HYPERSCALERS

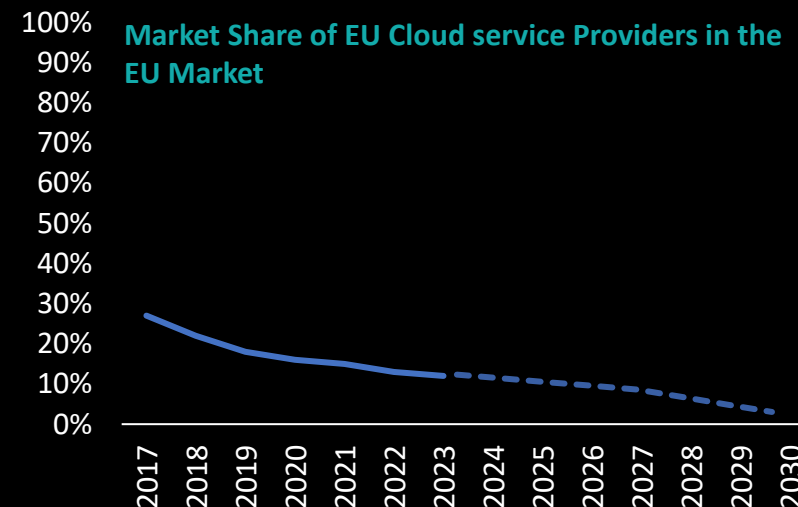
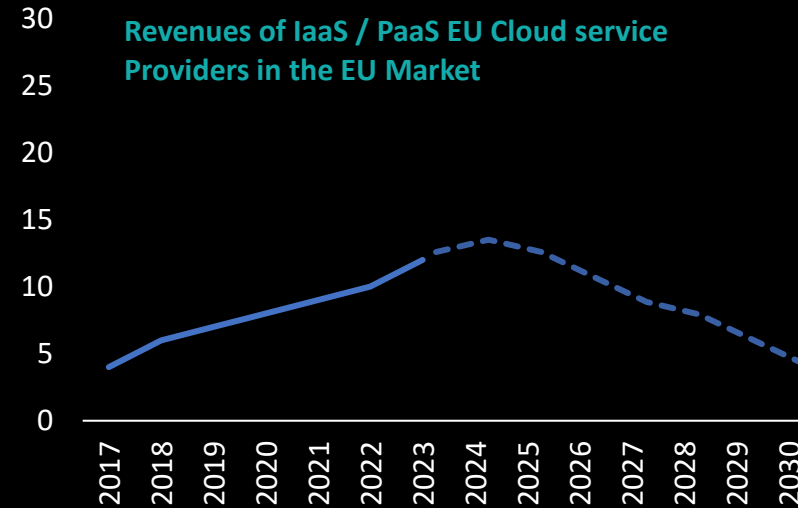
Gaps in Digital Sovereignty and Proximity + Lock in and Hyper-centralization

### EU CSP

Gaps in Critical Mass and Service Portfolio depth and maturity

### EU PROJECTS

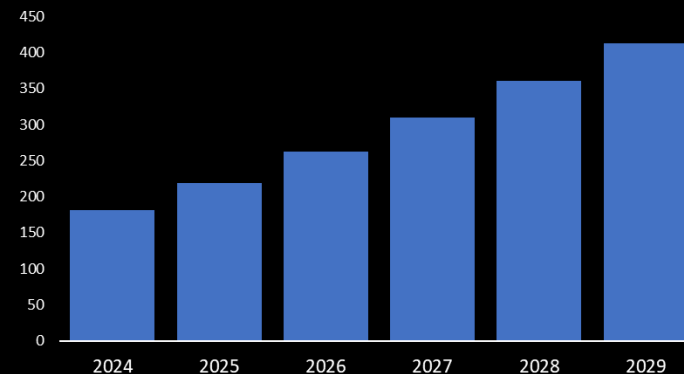
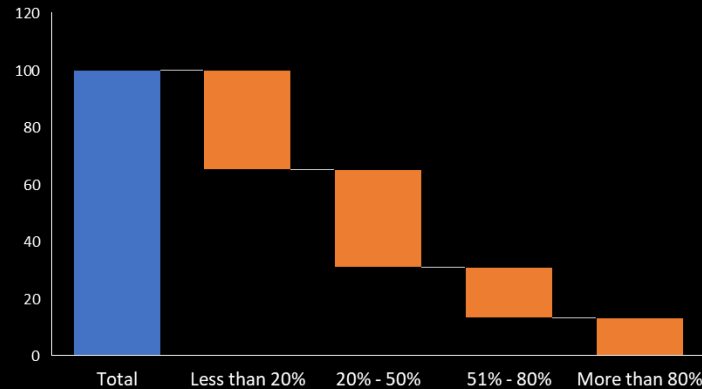
Not a Commercial Offering



**BOILING  
FROG  
SYNDROME?**

# EU Cloud Market – Missed opportunity

In 2025 only about 50% of EU organizations adopt cloud services, producing a market demand of +200Bn, fulfilled by EU providers for only 10-15% (20-30Bn), where the biggest single CSP has a market share of 2% (4Bn)



- EU cloud demand big and growing
- Our offer small and fragmented
- EU single market exploited by big foreign ones

# EU Cloud Market - Disconnect between Demand and Supply

## EU CLOUD DEMAND

**GROWING**

**NO LOCK-IN**

**DISTRIBUTED**

**PROTECTED**

**RESILIENT**

**SUSTAINABLE**

**It is a market  
problem, not a  
technology  
problem!!!**



## EU CLOUD SUPPLY

### **HYPERSCALERS**

Gaps in Digital Sovereignty and Proximity + Lock in and Hyper-centralization

### **EU CSP**

Gaps in Critical Mass and Service Portfolio, no experience with complex transformation

### **EU PROJECTS**

Gaps in Concrete Commercial Offering

# What Alternatives for EU

## 01 Hyperscalers



Gaps in **Digital Sovereignty** and **Proximity** + **Lock in** and **Hyper-centralization**

### Strengths

- Capacity
- Scalability
- Offering
- Network of Partners
- Innovation

### Weaknesses

- Controllability
- Client Proximity
- Centralization
- Jurisdiction
- Closed systems

## 02 Individual EU CSPs



Gaps in **Critical Mass** and Service **Portfolio** depth and maturity

### Strengths

- Controllability
- Client Proximity
- Distribution
- Jurisdiction
- Open Standards

### Weaknesses

- Capacity
- Scalability
- Offering
- Network of Partners
- Innovation

## 03 European Projects



Gaps in **Concrete Commercial** Offering

### Strengths

- Compliance
- Aggregation
- Awareness
- Standards
- Fundings

### Weaknesses

- No EU Influence
- Conflicting Interests
- No Commercial Impact
- Disjoint Initiatives

\*Logos are provided as examples and do not represent an exhaustive list of alternatives.

# Key Pitfalls

01

**EU Providers are too small**  
**(yes... individually, but not together!)**

02

**EU Investments are too little**  
**(no... if we invest in competitive actions meeting private interests)**

03

**EU Regulation too complex**  
**(yes... it must be warped into a competitive element)**

# Truth is EU Can Make it Joining Forces Commercially!

Service category	<b>AWS Top Seller</b>	<b>Microsoft Azure Top Sellers</b>	<b>Google Cloud Top Sellers</b>				
				<b>DE</b>	<b>FR</b>	<b>IT</b>	<b>FOSS</b>
Compute	EC2	Virtual Machines	Compute Engine	IONOS Cloud, Gridscale, HostEurope	OVHcloud Public Cloud, Scaleway	Aruba Cloud, Enter Cloud Suite	OpenStack), Apache CloudStack, Kubernetes
Storage	S3	Blob Storage	Cloud Storage	IONOS HiDrive, Cloudian HyperStore, Dunamu Cloud Storage	Scaleway Object Storage, OVHcloud Object Storage	Aruba Cloud Object Storage	Ceph , MinIO , OpenIO
Databases	RDS	Azure SQL Database	BigQuery	Aiven, ScaleGrid, ObjectRocket	Scaleway Managed DB , OVHcloud Managed DB	MailUp Managed Databases	PostgreSQL , MySQL, MariaDB, Apache Drill, Apache Hive, Presto
Serverless	Lambda	Azure Functions s	Serverless	IONOS Cloud Functions	Scaleway Serverless Containers		OpenFaaS, Kubeless, Apache OpenWhisk
CDN	CloudFront	Azure CDN	Cloud CDN		Scaleway CDN		AI/ Nginx
AI/ML	SageMaker, Rekognition, Lex, Transcribe, Translate	Azure Machine Learning Service, Cognitive Services	Cloud AI Platform, Cloud Vision AI, Cloud Video Intelligence, Cloud Natural Language AI	Dataiku, Aleph Alpha, Deepomatic	Datarobot, Deepen.a	Allegroai, Expert.ai, Breezer	TensorFlow, PyTorch, Hugging Face Transformers, OpenCV, Apache OpenNLP
SDN		Azure Virtual Network		Kaledo SDN	VirtualWire		OVS, OpenDaylight
Virtualization				Proxmox VE	Proxmox VE	Proxmox VE	KVM, Xen, VirtualBox
Cybersecurity				Rohde & Schwarz Cybersecurity	Stormshield	Yoroi	Snort, Suricata, Zeek

# The True Problem – We Asked the Market!

## Customers Need

## Providers Need

01

**Business Solutions**  
**(not technology)**

01

**Customers**  
**(they can buy servers, not deals)**

02

**Digital Transformation Skills**  
**(not bare cloud resources)**

02

**Resellers**  
**(no one can be a champion alone)**

03

**One stop shop**  
**(not many dispersed)**

03

**Partners**  
**(to turn cloud into business)**



# The Solution

# A One-Stop Marketplace for European Solutions



Leverage on Existing Assets

OneStopShop for EU Solutions

B2B Operator2Operator

Automates Multi-Supplier Integration

Participation Open to EU Providers Only

Capital Participation Open to EU Subjects Only

# OneStopPlace to buy European!

The first **commercial federation** across **European only** market operators offering Cloud and Digital Solutions

Implement the new concept of a **CVSP (Cloud Virtual Service Provider)** to increase everyone sales oppoerunities

Build the **critical mass** and federation necessary to sell, compete, enabling **European Sovereignty** and **Innovation**



**A true Marketplace**, not just a catalog of browsable items, to cover the full order to cash process



Automates **onboarding, qualification, sales, and provisioning** of multi-supplier offerings

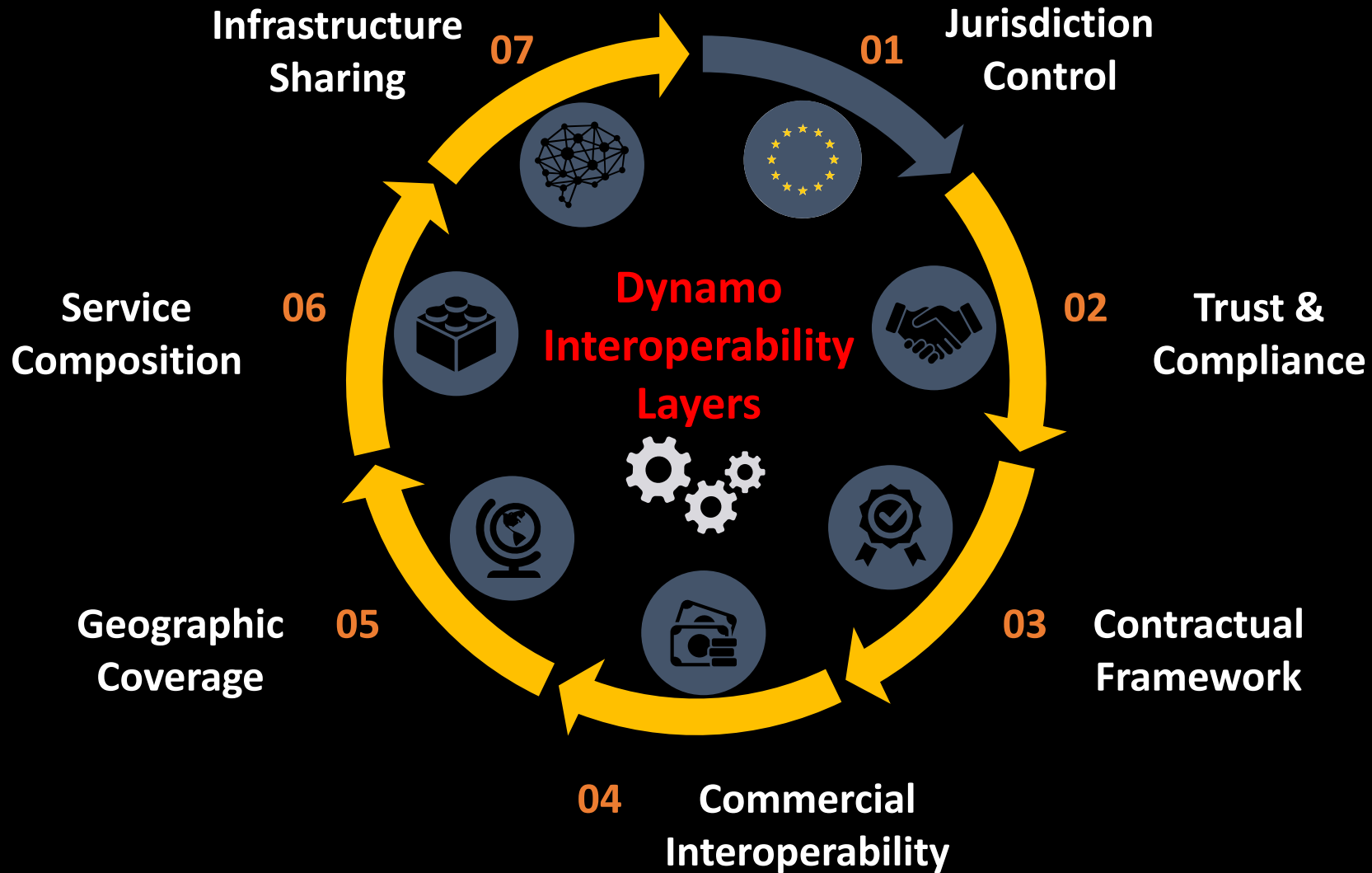


**Alike a virtual merger** enables seamless interoperability across different legal entities

# Group and Reinforce the EU Digital Industry



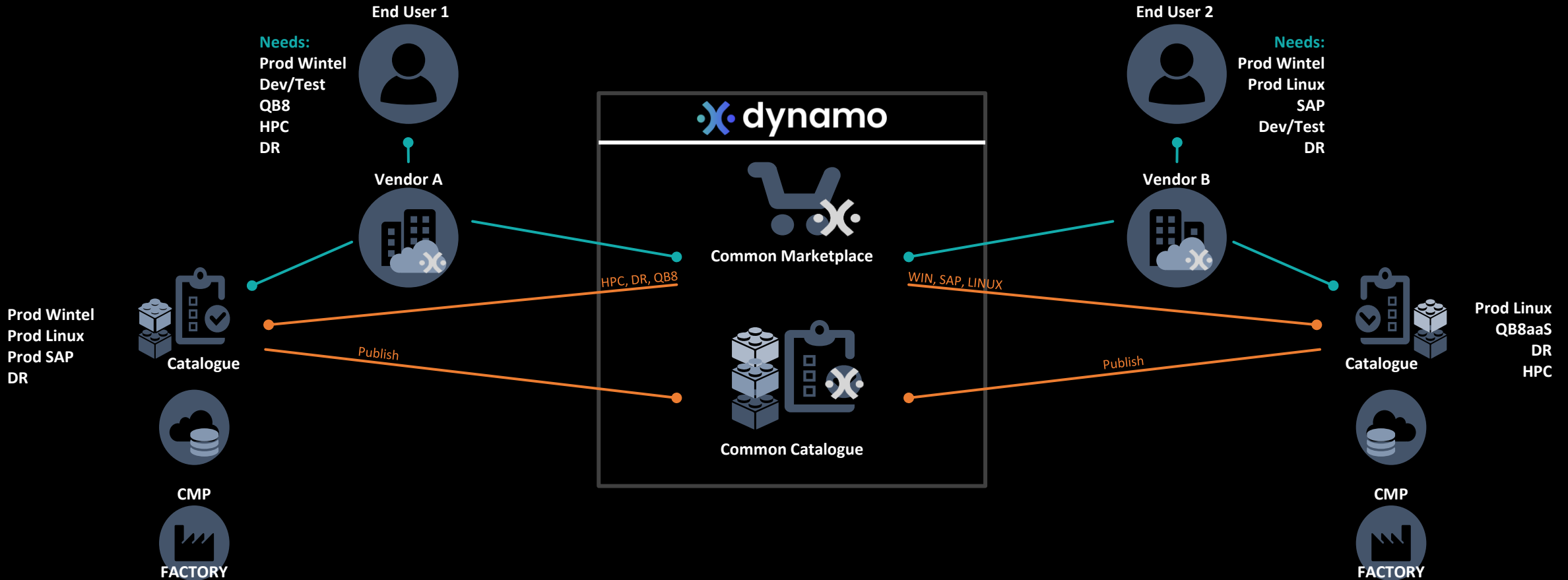
# Multiple Layers of Interoperability



# Compensate Each Other's Limitations

2

## Enrichment Use Case



# What - Expected ROI and KPI



New Sales  
Volume  
**260%**



Customer  
Base  
**20%**



Territorial  
Coverage  
**20%**



Win  
Rate  
**70%** **50%**  
Net New Renewals



Resource  
Capacity  
**50%**



Portfolio  
Breadth  
**50%**



Profit  
Margins  
**5%**

This multi-faceted growth strategy positions us to capitalize on market opportunities, enhance our competitive edge, and drive substantial returns on investment.

# Not an idea.. Started 1 year ago, and ready to go!



BOOST YOUR BUSINESS WITH DYNAMO

## Unlocking the power of the new European cloud and data ecosystem

Dynamo is the catalyst for **collaboration, trust, and innovation among European Cloud Service Providers (CSPs)**, paving the way for a resilient and competitive European digital economy.

### Partners supporting and endorsing Dynamo



# Dynamo – Eurostack Related Initiatives

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Dynamo.cloud

## SECA, for an independent digital Europe

Aruba, IONOS and Dynamo introduce Sovereign European Cloud API (SECA)  
An open industry standard, a new Application Programming Interface specification for Cloud Infrastructure Management, paving the way for the EuroStack.

SECAPI.cloud

## #EUROSTACK: EUROPEAN STRATEGIC SOVEREIGN DIGITAL INFRASTRUCTURES

*Joining and building logical and physical infrastructures to secure Europe's role in competitive digital value chains.*

A PITCH DOCUMENT  
10 January 2025

CONTRIBUTORS:  
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Euro-Stack.eu

# The Challenges – Why we are where we are?

## INTERNAL COMPETITION

EU subsidized projects compete with private initiative to justify their fundings

## TOO MUCH FOCUS ON R&D

EU Funded projects focus on technology whilst the problem is commercial

## INDUSTRIAL INDIVIDUALISM

Providers protect their shrinking market instead of synergizing commercially

## NO PERCEPTION OF URGENCY

EU initiatives timing and deliverables are incompatible with the urgency

## NO BUSINESS OUTCOMES

EU pre-competitive projects produce no commercial impacts in the market

## INDUSTRY NOT INVOLVED

Providers, System Integrators, End Users are out of the decision process

# Recipe for Fast Recovery - How can EU support?

## INCENTIVIZE COMMERCIAL FEDERATION

Subsidies/ de-taxation on income from commercial aggregations (like Dynamo)

**Expected Benefit:** Increased market share for EU providers

## CREATE A COMMON EU DIGITAL CERTIFICATION SCHEME

For digital skills certifications (SECA alike) valid for public tender awarding criteria

**Expected Benefit:** EU talent retention, partner creation, demand increase

## FORCE TO BUY EU SOLUTIONS OR JUSTIFY

Public procurement transparency rules to explain non adequacy of EU solution

**Expected Benefit:** Demand Increase & EU provider gaps evidence

## ASSESS AND REMODULATE EXISTING DIGITAL DECADE FUNDS

Assess existing funded initiatives against market KPI to remodulate funding by 2030

**Expected Benefit:** +100Bn availability for fast commercial impactful initiatives

## INCENTIVIZE COMMON CLOUD INDUSTRY API

For adopting a common API scheme for a uniform product access (like SECA)

**Expected Benefit:** composable offering & common certification scheme

## TURN DYNAMO INTO A PUBLIC UTILITY PLATFORM

Support proposal to transform Dynamo in a PPP project (EDIC or alike)

**Expected Benefit:** sustain non-competitive model, fast expansion to all EU providers

**TOGETHER WE STAND, DIVIDED WE FALL**

**Join Dynamo!**

[info@dynamo.cloud](mailto:info@dynamo.cloud)