

Open Letter

European Digital Industry Ecosystem Calls for Deployment of the EuroStack in the EU and Member States by 2030

6 May 2025

Dear President Von der Leyen

Dear Executive Vice-President Virkkunen

Dear Executive Vice President Séjourné

With increasing geopolitical pressure and a rapidly changing international order, the European tech ecosystem is at a crossroads: “Go European”, or remain *de facto* a “digital colony”. The figures are stark: a recent report^[1] confirms for instance that over 80% of spending on cloud/software by large European enterprises goes to US providers, with huge loss of economic benefits and jobs to the European economy. Even the same US tech giants which account for the bulk of our digital infrastructure are now so uncertain about the geopolitical environment that they volunteer implausible pledges of legal action against their own Administration to protect their European investments.

As the Commission has indeed recognised, the answer can only be that Europe must power its own digital industry and become strategically resilient, self-reliant, and more secure. This is a very ambitious endeavour which will require a major concerted effort both from European industry and our institutions.

We are an expanding group of European digital/tech businesses – from large enterprises to SMEs – supporting the [EuroStack](#) initiative. [Our letter](#) of 14 March, now signed by over 200 companies, offered support from European industry to put in place a realistic digital autonomy strategy. Since then we have seen the new German Coalition Agreement finalised with an explicit commitment to “EuroStack” – the vision that industry is endorsing for powering up our sovereign capabilities and reducing our dependencies from foreign actors. The French government also expressed on multiple occasions a commitment to building our way out of dependence and pursue in effect a EuroStack vision. The Dutch parliament has passed a number of motions to halt migration to US cloud services and build a sovereign Dutch Cloud, prioritize European companies in tenders and develop alternatives to US tech giants.

¹ [La dépendance technologique aux logiciels & cloud services américains : une estimation des conséquences économiques en Europe - Cigref](#)

We understand the Commission to be similarly engaged at present in formulating its plan for European digital strategic autonomy. We are aware that the European Parliament has been drafting an “own-initiative” report on digital sovereignty, calling for reducing the EU’s reliance on US tech providers, as well as a report on public procurement.

We also acknowledge the Commission’s 2025-27 Work Programme for the Digital Decade, issued on 29 March, with detailed spending plans for the remaining €1.3 billion of earmarked funds in the Digital Decade Programme. We believe much of that budget could be more effectively deployed to build foundational capabilities, foster market access for our European ecosystem, recover ground and move towards autonomy, resilience and greater security.

The reality we see as operators on the ground is that Europe has tremendous talent and capabilities in the digital space, at all levels of the supply stack – from physical infrastructure (including chips), to cloud, to software, to connectivity and AI, including a world-class Open Source ecosystem. What is missing – and the reason Europe has become so dependent – is not a dearth of primary innovation, nor inferior quality of the offering. It is our perennial problem of fragmentation of supply (as described in the Draghi report), lack of harmonised standards and absence of strategic support from the demand side, importantly through public procurement.

It is disconcerting that the European public sector has been using taxpayer money in procurement decisions which neglect long-term value, independence, resilience, exit costs and readily available European solutions. Put simply, European governments and institutions spending public money should have an obligation to invest in Europe's economic future. That should mean first and foremost “buying European”, to support our tech sovereignty, protect our sensitive data and enable our domestic tech sector to build up a “EuroStack”.

At this stage, powering Europe’s digital future will require action well beyond funding AI factories or super-computers. While AI is a priority for the Commission, and indeed for European business, it is not a separate component of our digital infrastructure - it relies on the underlying infrastructure. Emancipating Europe from its deep dependencies across key components of the stack requires policymakers working closely with industry to understand the market and create effective blueprints for how our extensive capabilities in these components can be deployed. Europe has cloud capabilities, a strong Open Source ecosystem and an extensive supply of software providers meeting high standards of autonomy, security, and interoperability. These assets should be prioritized and built upon in our digital autonomy strategy.

Our letter of 14 March mentioned in particular three areas where immediate action should be taken:

“Buy European”, “Sell European”, “Fund European”.

The attached paper (*Deploying EuroStack: What Needs to Happen Now*) articulates these further, emphasizing the need for procurement mandates, harmonised standards, enforceable openness, and strategic investment. There is nothing exceptional in this approach: these industrial policy tools have been widely used in other jurisdictions, including the US, for decades – as large public contracts powered the growth of today’s tech giants. In terms of quality of service, there is no question that European suppliers can provide the goods and services that the public sector needs, and also meet the private sector’s demands.

The paper contains concrete proposals for projects that are implementable in the short term and would help Europe reduce its digital dependency on American and Asian providers. It is meant to feed an indispensable reflection within the EU Commission, Council and Parliament. It has been drafted by a dedicated working group of CEOs and industry participants, representing a broad consensus among the 200+ signatories to the original letter (though of course not every sentence is attributable to each of the original signatories).

We would very much appreciate the opportunity to discuss with you how we can together create digital autonomy for our public sectors, our industry and citizens - as fast as possible, and sustainable for generations to come.

The EuroStack Industry Group

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 and an [open letter to the European Commission](#) in March. Further reports and initiatives also support the original idea, reflecting the shared sense of urgency now felt across Europe.