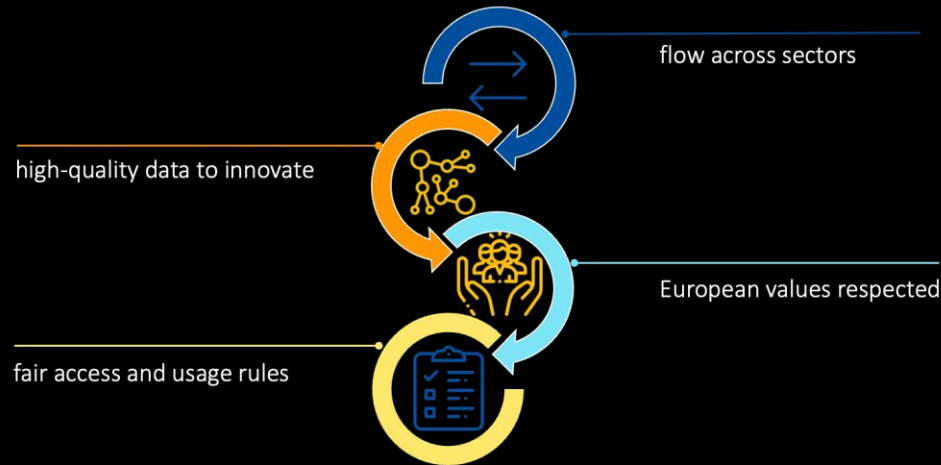# The European Cloud Alternative

# Data Economy: the European Strategy

01 **Data Federations (Industrial Dataspaces)**

02 **Cloud Federations (Interoperable Aggregates)**

The European Data Strategy first pillar focuses on creating **industry data spaces** to facilitate companies' access to distributed high- quality data across the value chains, respectful of European values and with defined access and usage rules
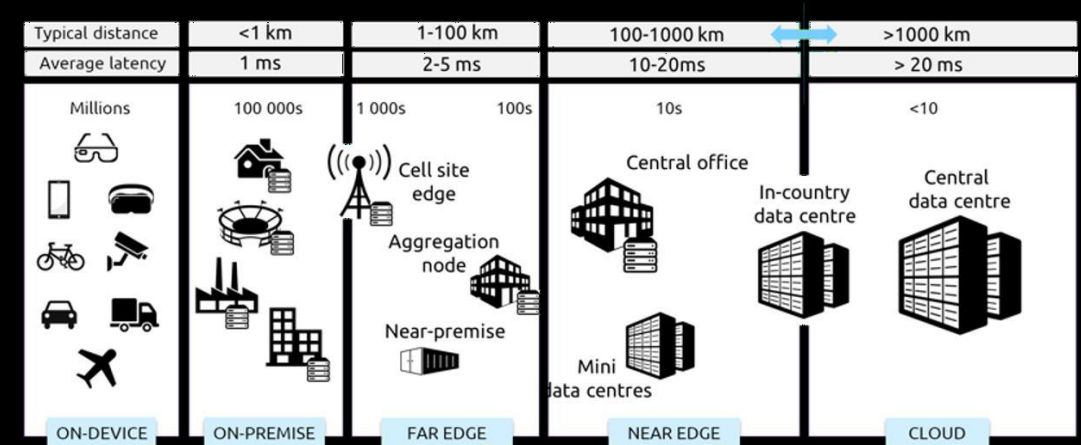
The second pillar of the European Data Strategy addresses **data gravity and availability** across the cloud-to-edge continuum. The increasing volume and importance of data, coupled with the need to process data close to its point of generation and use, necessitates the development of an enabling distributed and **federated cloud infrastructure.**
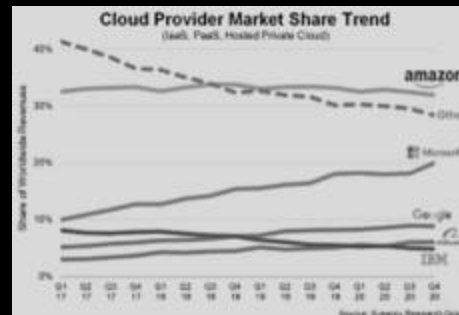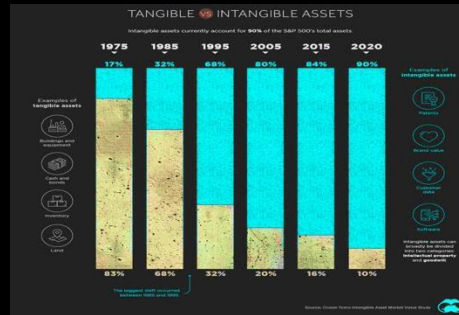
European Data Economy and Cloud: Where do we stand?

**+150BEur Allotted & Halfway Through the Digital Decade Program:
Still Europe is heavily lagging behind**

Data Economy Growth

- **90%** or Real Economy is Intangible (S&P500)
- **1TEur** EU Data Economy in 2030
- **x3** EU Cloud market growth in 3 years
- **+70%** of Cloud market in 3 companies

Europe Lagging Behind

- **+350** Rules in +10 Acts of EU Regulation
- **10%** of Collective Marketshare by EU CSP
- **+90%** of Shared Data out of EU (jurisdiction)
- **<30%** Ave. Cloud Uptake by EU Enterprises

The problem for CISPE Members: the EU Business [_____] today

There is a critical gap in the European cloud market, leaving businesses without a comprehensive, sovereign and competitive solution. Individual European Cloud Service Providers, while aligned with regional interests, struggle with insufficient scale and limited-service portfolios. Current European initiatives focus primarily on enforcing compliance but fail to deliver concrete commercial offerings that businesses need.

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

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

Dynamo: A Cloud Virtual Service Provider

The first real **commercial federation** across **European only** Cloud and Digital Service Providers

Implementing the new concept of a **CVSP (Cloud Virtual Service Provider)**

Building the **critical mass** and federation necessary to compete and enable **European Sovereignity** and **Innovation**

A true Marketplace, not just a catalog of browsable objects

Virtually **centralizing onboarding, qualification, billing and provisioning** of de-centralized resources
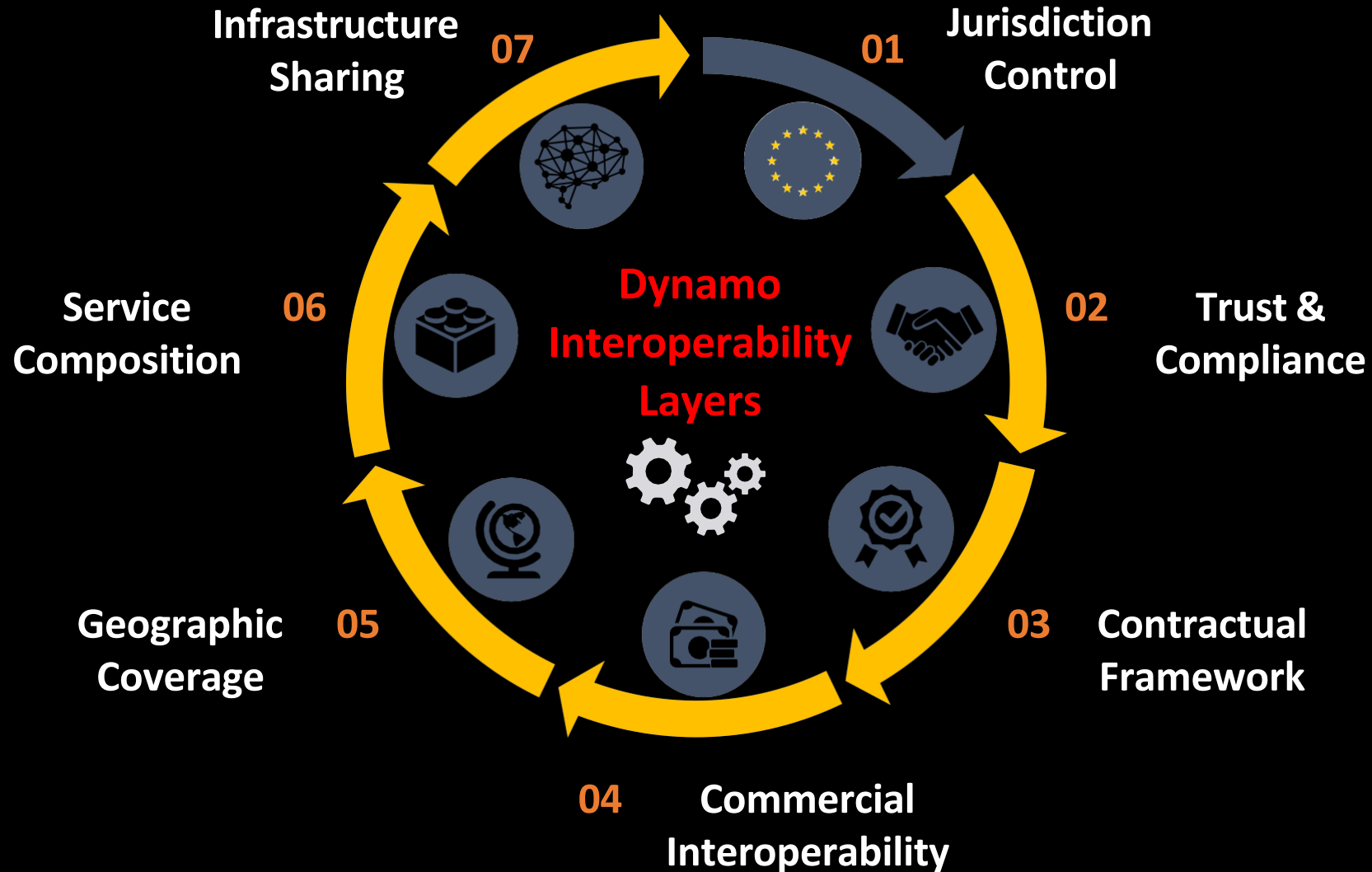
Alike the virtual merger into a single new legal entity of as many European operators

How Dynamo can support the new priorities for European CSPs

Credibility and Visibility

Enrich Offering

Reach New Markets

Innovation & Compliance

Dynamo's Seven Layers of Interoperability

07 Infrastructure Sharing

01 Jurisdiction Control

02 Trust & Compliance

03 Contractual Framework

04 Commercial Interoperability

05 Geographic Coverage

06 Service Composition

Dynamo Interoperability Layers

ROI: Key Performance Indicators

dynamo

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.

How GenAI sees European Alternatives to Hyperscalers Top Sellers

Service category	AWS Top Seller	Microsoft Azure Top Sellers	Google Cloud Top Sellers	DE	FR	IT	FOSS
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

TOGETHER WE STAND, DIVIDED WE FALL

Support Dynamo!

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