



NBIP NEXT 2025

The Future of the €3B IPCEI Cloud

Can State Aid Deliver Digital Sovereignty?

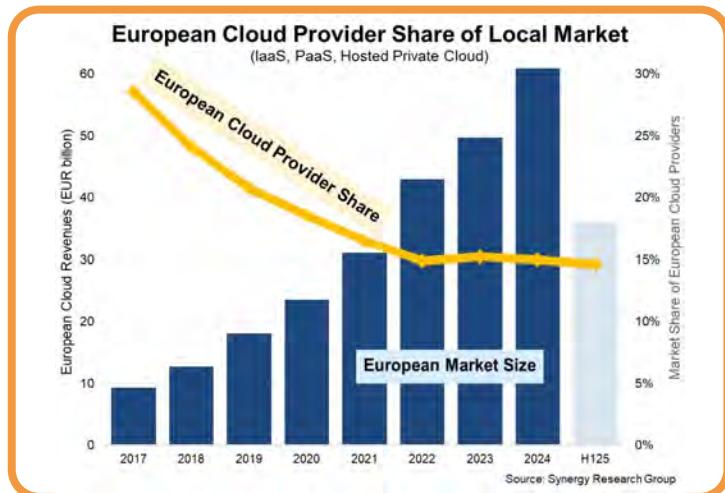
Dr. Alberto P. Martí

Chair of the Industry Facilitation Group @ IPCEI Cloud
VP of Open Source Innovation @ OpenNebula Systems



Can we fix the EU cloud market?

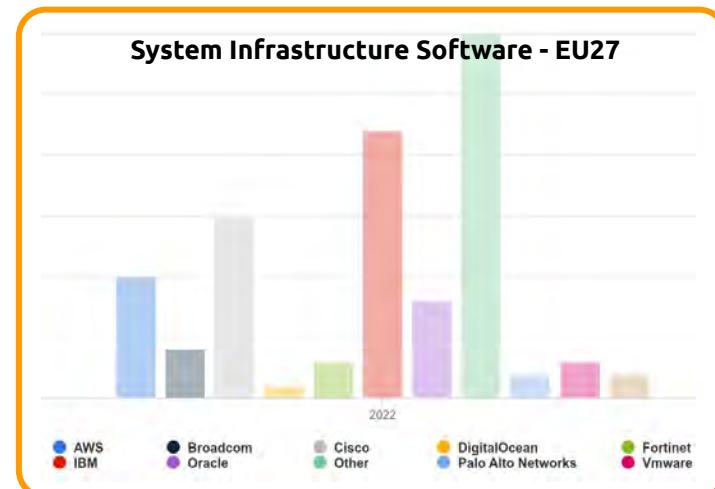
Cloud Services



Source: Synergy Research Group (July 2025)

Share of EU CSPs has declined
(From 29% in 2017 to 15%)

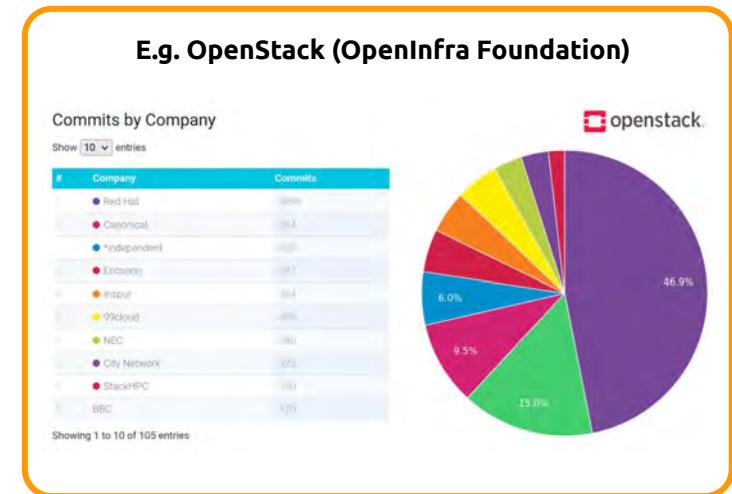
SysInfra SW Market



Source: Statista (October 2022)

No top competitor from the EU
(All of them are US companies)

Open Source SW



Source: Stackalytics (January 2023)

Marginal (<5%) role of EU code
(Dominated by US organisations)

Member States Declaration (2020)



Feb 2020

European Strategy for Data aims to build a single market for data



May 2020

Recovery and Resilience Facility
20% Digital EU Flagship “Scale-up”



Oct 2020

Member States Declaration for next generation European cloud



Mar 2021

Digital Decade Strategy sets targets on edge and cloud for 2030



May 2021

Updated EU Industrial Strategy evidences strategic dependencies

Member States Declaration (2020)

In October 2020, all 27 EU Member States signed a joint declaration on “Building the next generation cloud for businesses and the public sector in the EU”:

- “The EU has a unique opportunity to address the need for more data sharing and decentralised data processing, **closer to the user (at the edge)**”.
- “Completely interoperable, open, multi-vendor cloud platforms and services, based on European, international or **open source standards**, will enable users to migrate effectively to the cloud (...).”



Introducing the IPCEI-CIS



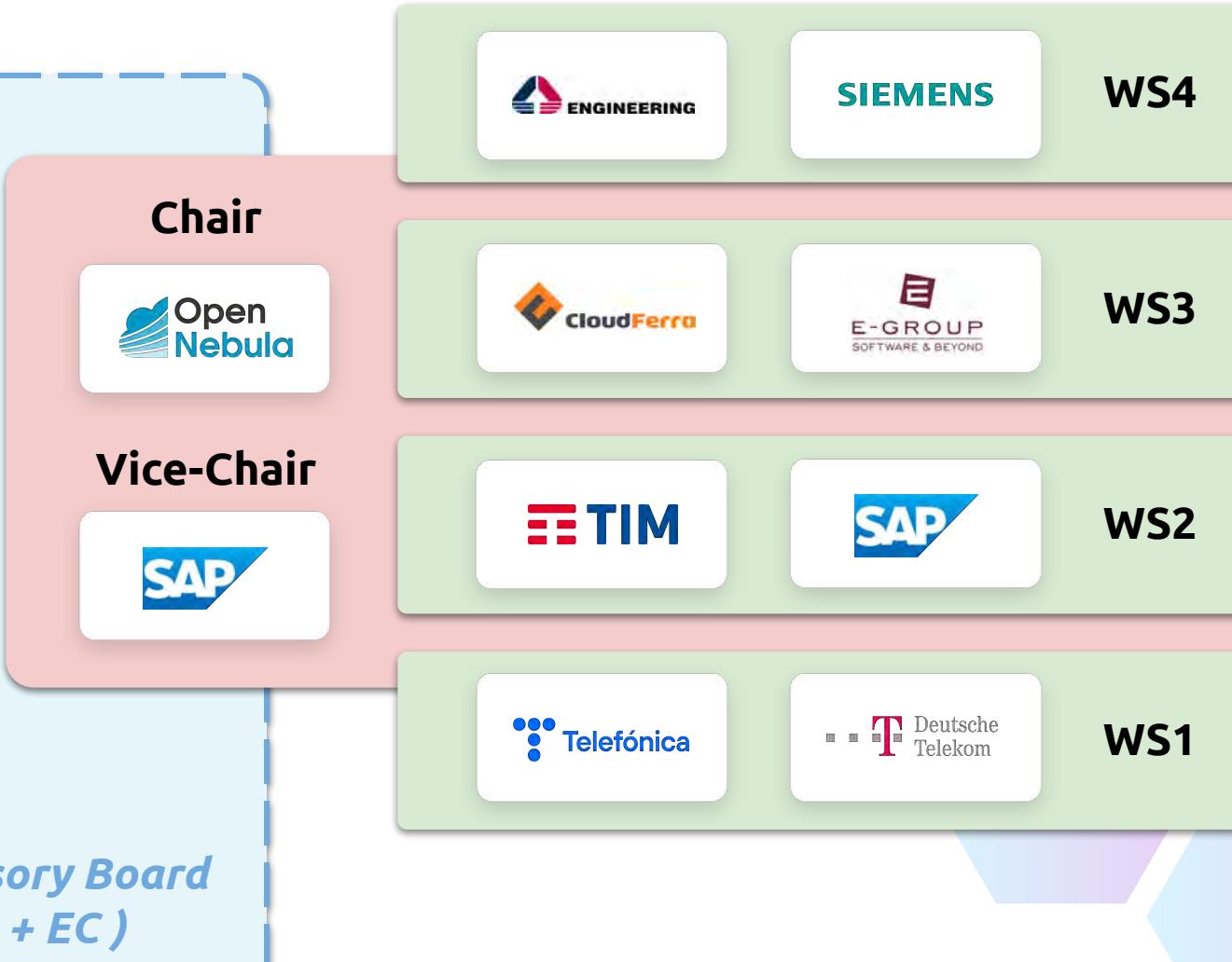
Introducing the IPCEI-CIS

- ✓ *Enable the Multi-Provider Cloud-Edge Continuum*
- ✓ *Strengthening the EU Digital Industry*
- ✓ *Development of European Open Source Technologies*
- ✓ *€1.2B in State Aid + €1.4B in private co-investment*
- ✓ *120+ European companies from 12 Member States*



Introducing the IPCEI-CIS

Industry Facilitation Group



Wider IPCEI CIS Ecosystem

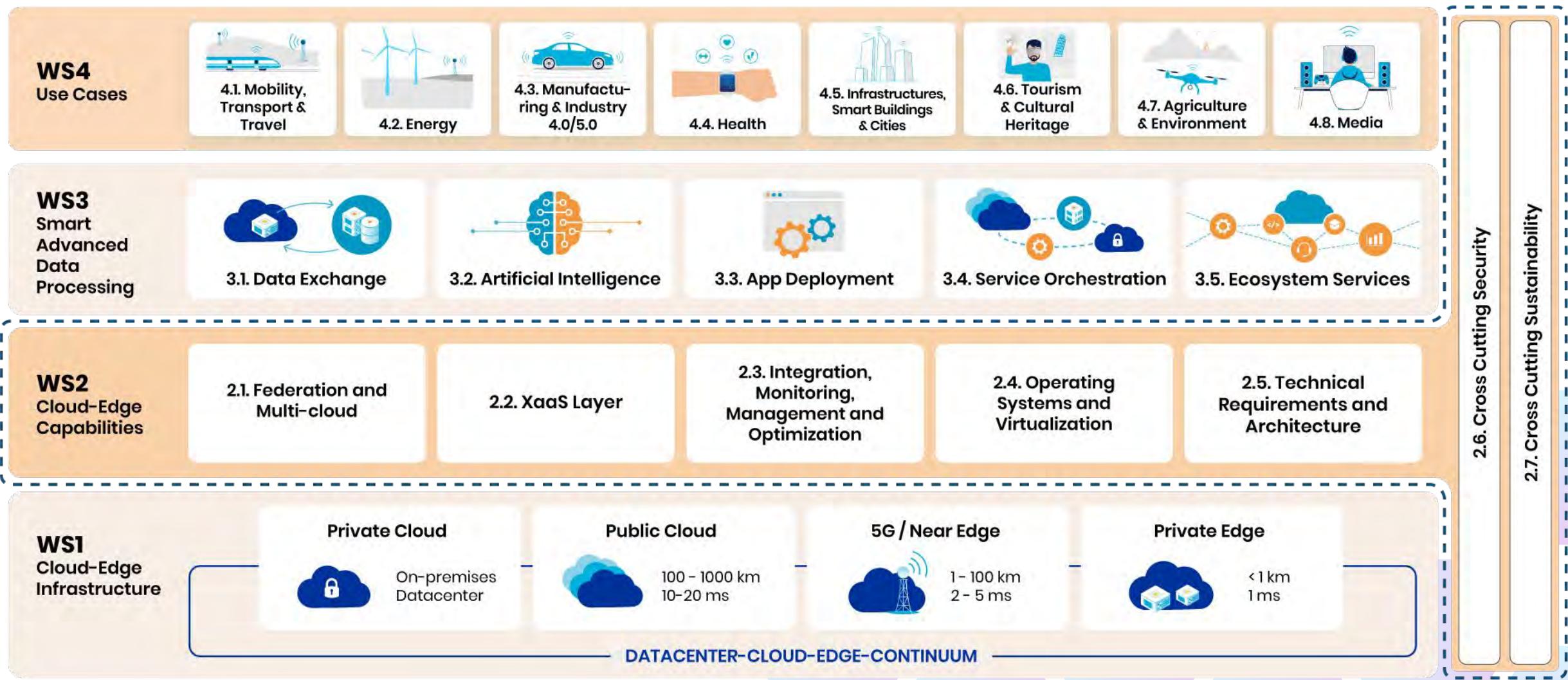
Direct Participants

4iG	Arsys Internet	Atende Industries	Atos	CloudFerro
Deutsche Telekom	E-Group ICT Software	Engineering Ingegneria Informatica		
Fincantieri	Leaseweb Global	Oktawave	OpenNebula Systems	Orange
Reply	SAP	Siemens	Telefónica España	TIM
				Tiscali

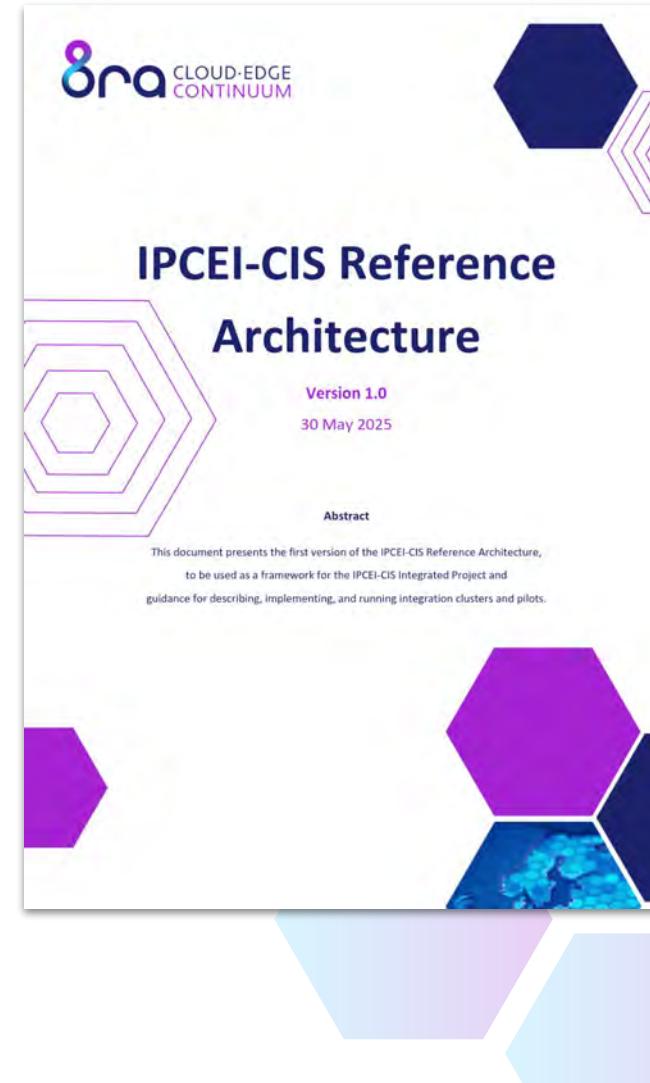
Indirect Partners

ADVA Optical Networking	Aecoris	Airbus Operations	Amadeus
Amiral Technologies	Amsterdam Internet Exchange	Armadillo	Aspired
Bass	BetterBe	BIT	Capital Energy Service
CNRS IRISA	CNRS LAAS	CNRS UGA ERODS	CGI France
DataVaccinator	DATI Group	DB Netz	DE-CIX Management
Deerns Nederland	Diehl Aerospace	e-BO Enterprises	elevait
Engie Laborelec	Ericsson	Eurofiber Nederland	Excellium Services
Fachhochschule Dortmund	Fondazione Bruno Kessler	Gdańsk University of Tech	
Gigas Hosting	H1 Systems	Hashnet	i3d.net
Indra Soluciones Tecnológicas de la Información	Infobip	Info Support	
Infrachain	INRIA LILLE - Nord Europe	INRIA Nancy- GRAND EST	
Institut Imagine	Internet Institute	Ionom	Iskra
Kontron	Lacroix Electronics Cesson	Lacroix Sofrel	Limebird
Lindner	Luxembourg House of Cybersecurity	Mondragon Corporación	
Nederlandse Organisatie voor toegepast-natuurwetenschappelijk onderzoek (TNO)		N+P Informationssysteme	
Ningaloo	No Blue Screen System	Operator Chmury Krajowej	Phoenix Systems
Pro-bit	Provenrun	Proximus	Recog. AI
Rheinmetall Technology Center	Robert Bosch	RHEA Group	RYAX Technologies
Secunet Security Networks	Stichting Nationale Beheersorganisatie Internet Providers	SYSGO	
Telemach	ThreeFold Tech	Tilde	United Biometrics
Universite Caen Basse Normandie	Universite de Lille	Universite de Versailles Saint-Quentin-en-Yvelines	Universite Bretagne Sud
Universiteit Twente	Universiteit van Amsterdam	University of Latvia (IMCS)	
Ventspils High Ventspils Technology Park	WestfalenWIND IT	Zejn	

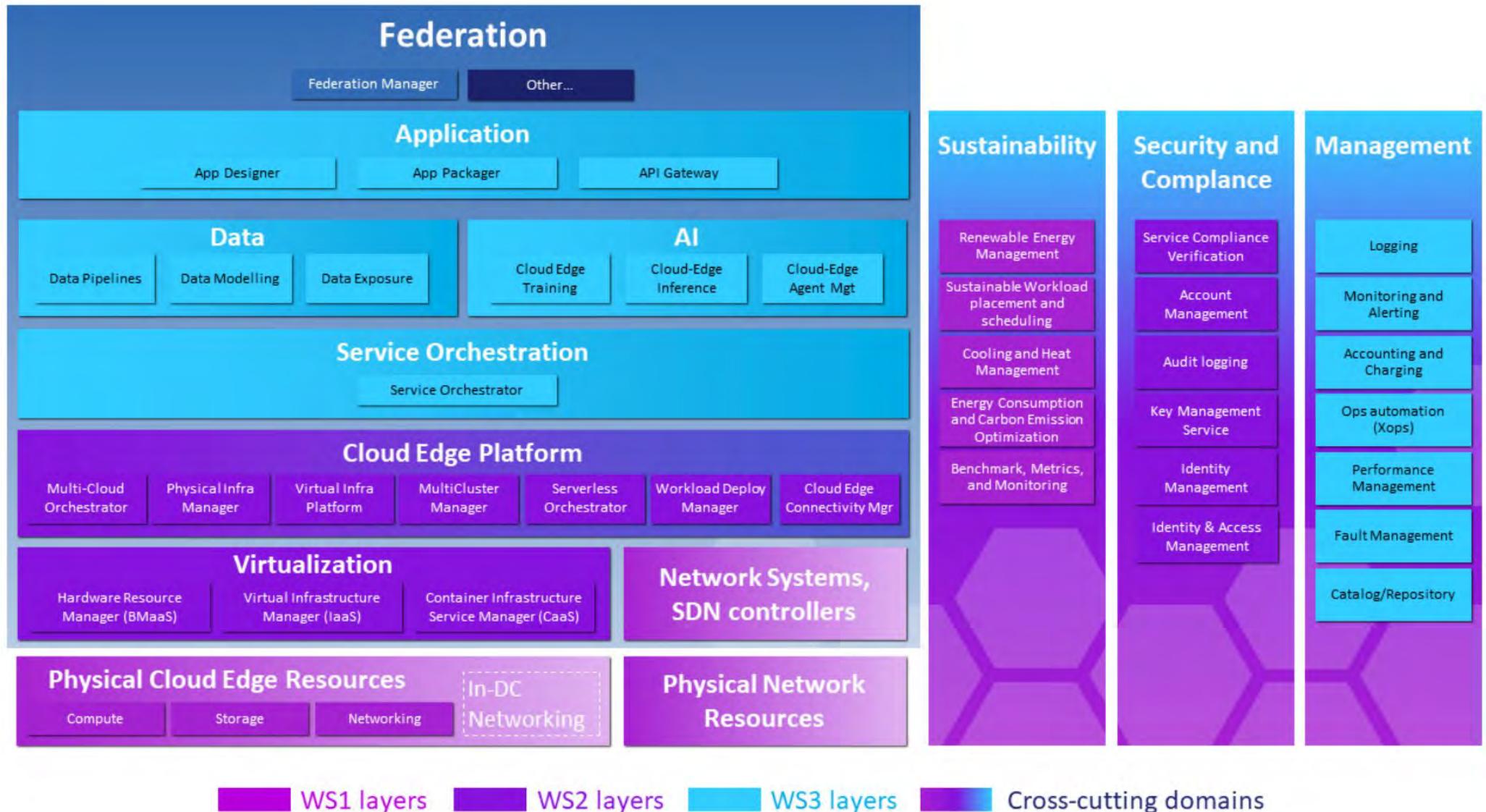
Introducing the IPCEI-CIS



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Introducing the IPCEI-CIS

Collaborative Security Framework (CSF)	Cross Cutting Sustainability
Security building blocks identification and classification	Reduce energy consumption
Identifying gaps and proposing solutions	Increase energy efficiency
Establishing a baseline security compliance posture	Reduce the amount of data transferred by edge computing
Testbed infrastructure for validation	Develop green technologies beyond the state-of-the-art



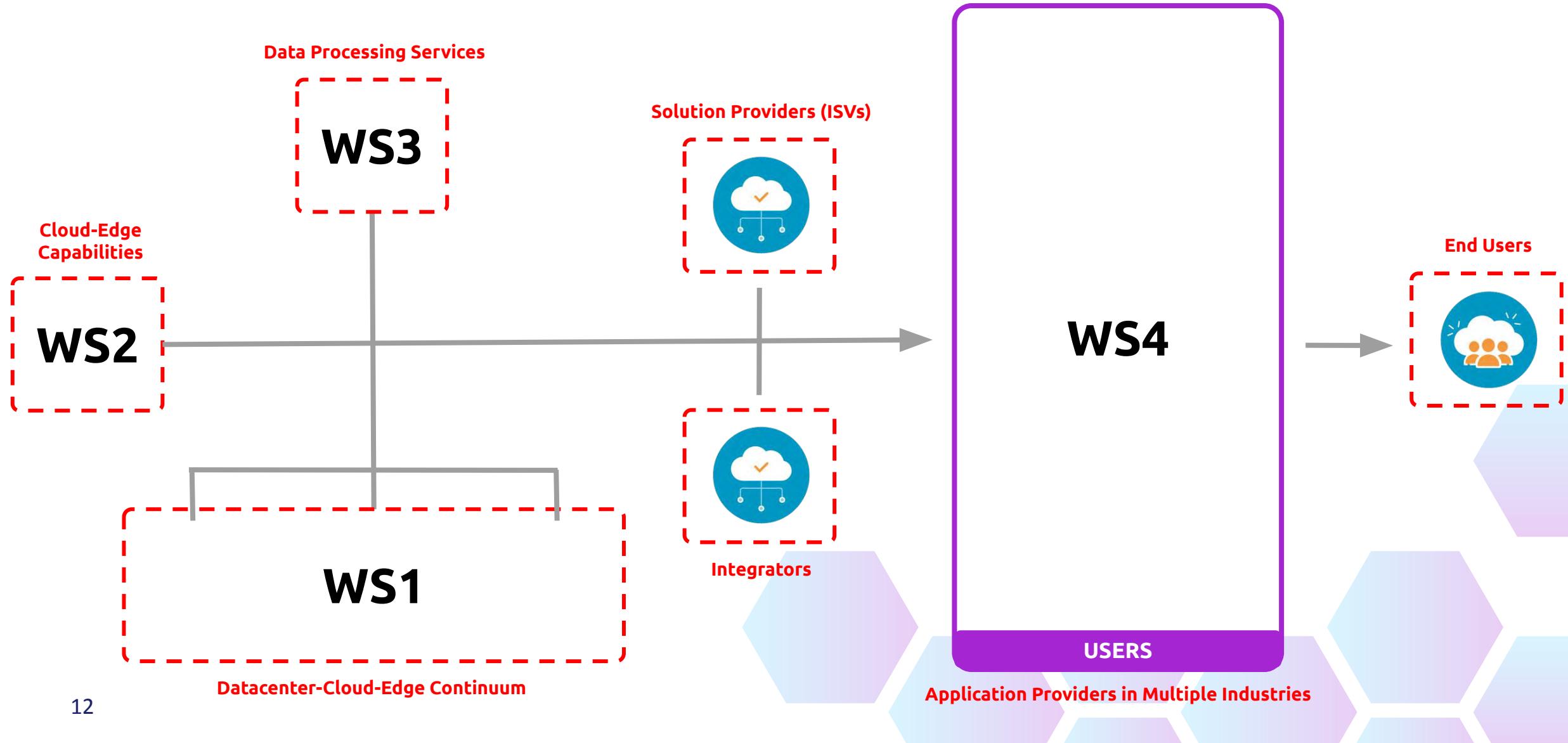
ationale
beheersorganisatie
internet providers

OKTA^{WAVE}

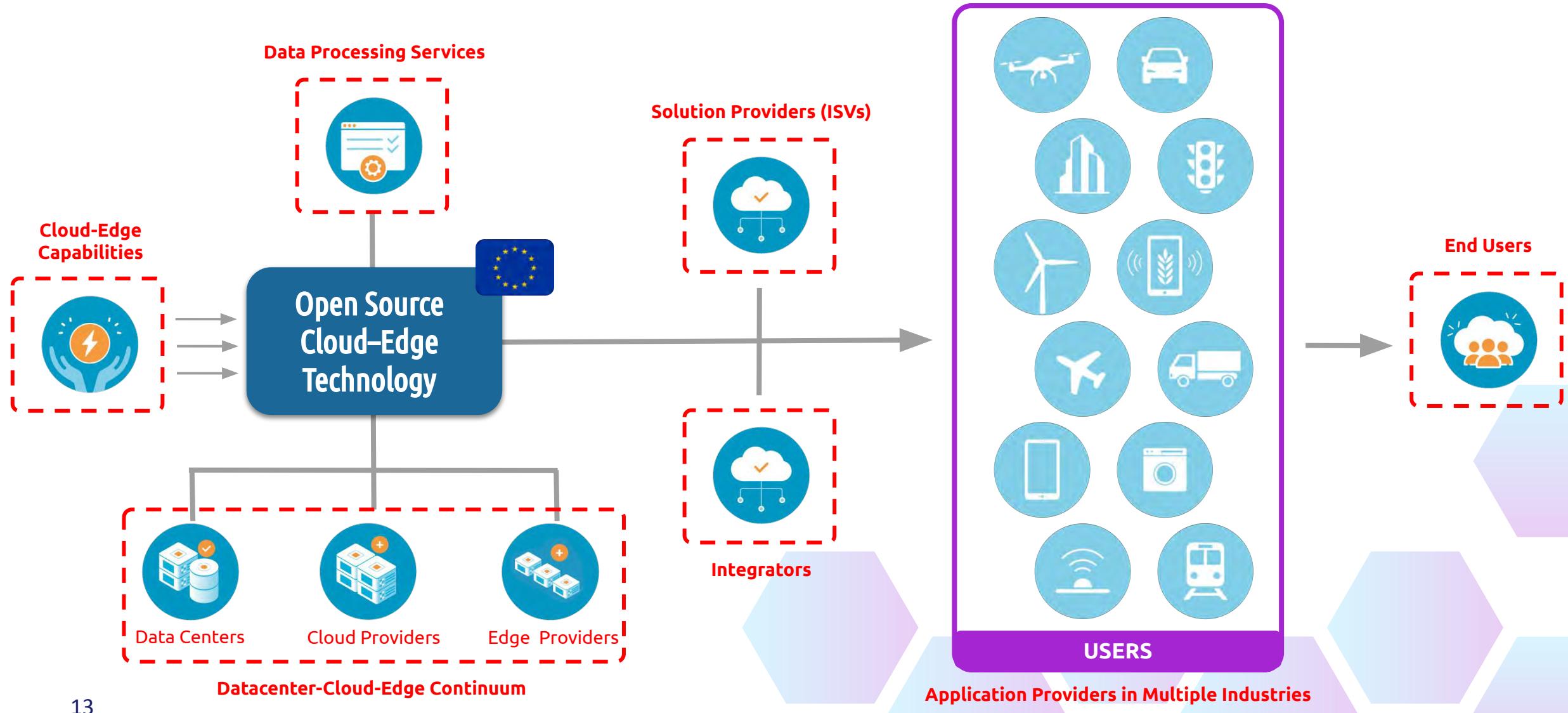
T Systems

WestfalenWIND

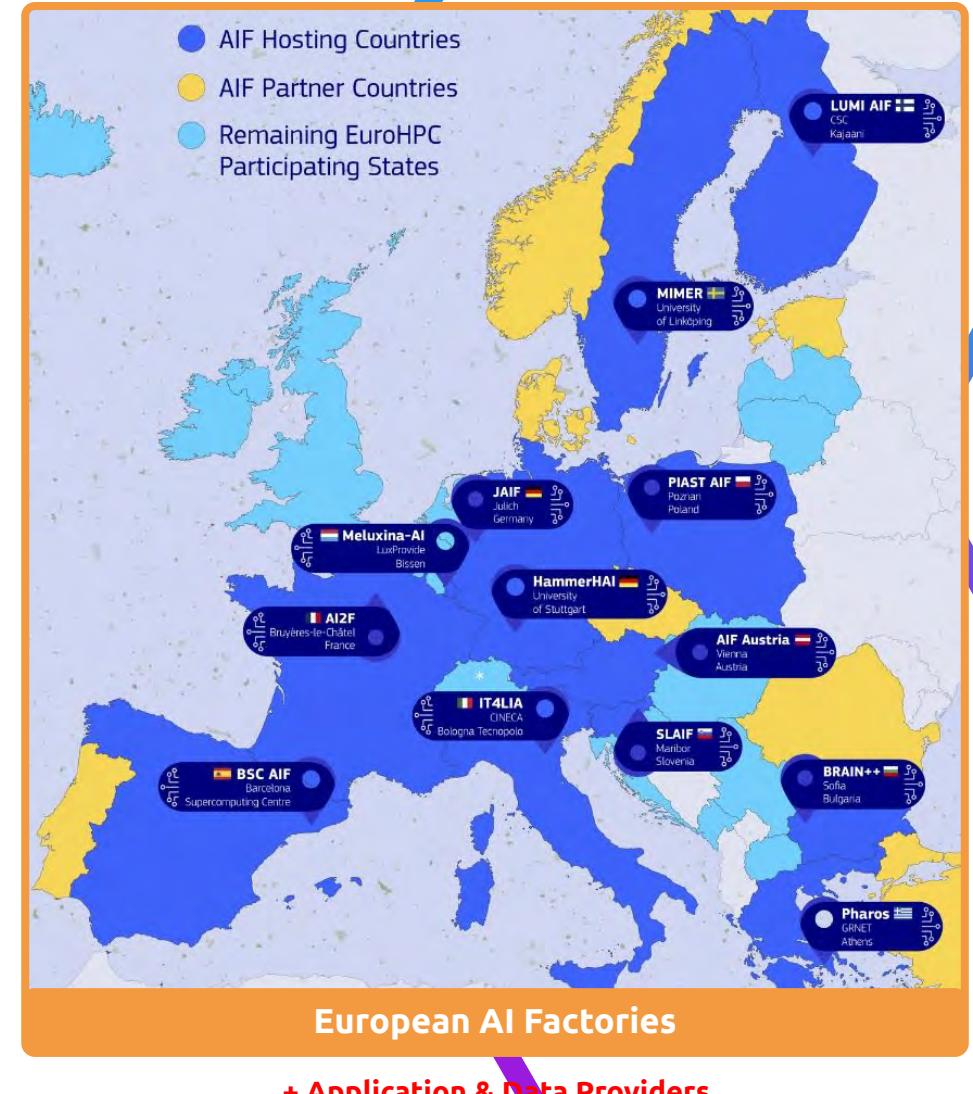
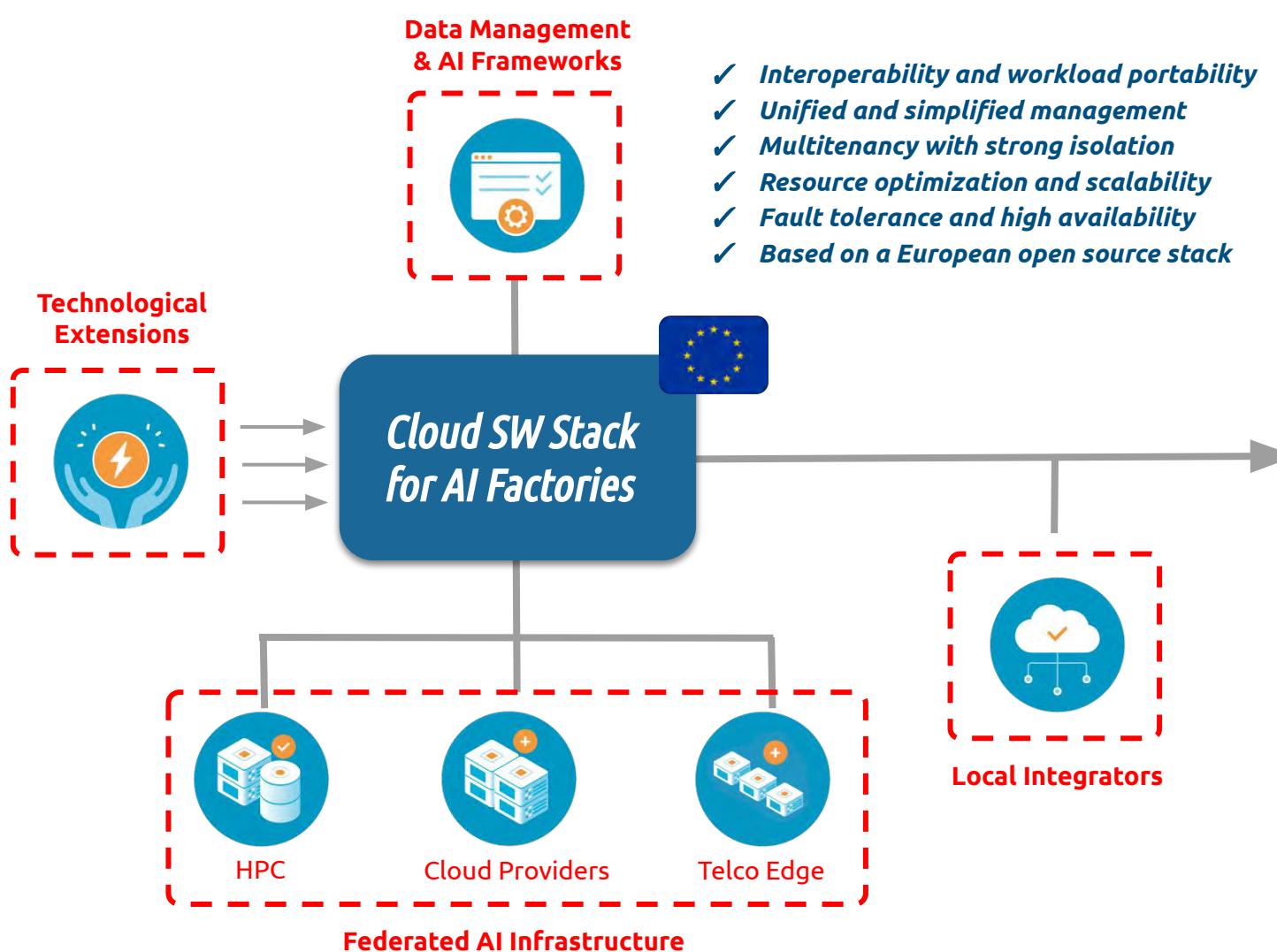
Introducing the IPCEI-CIS



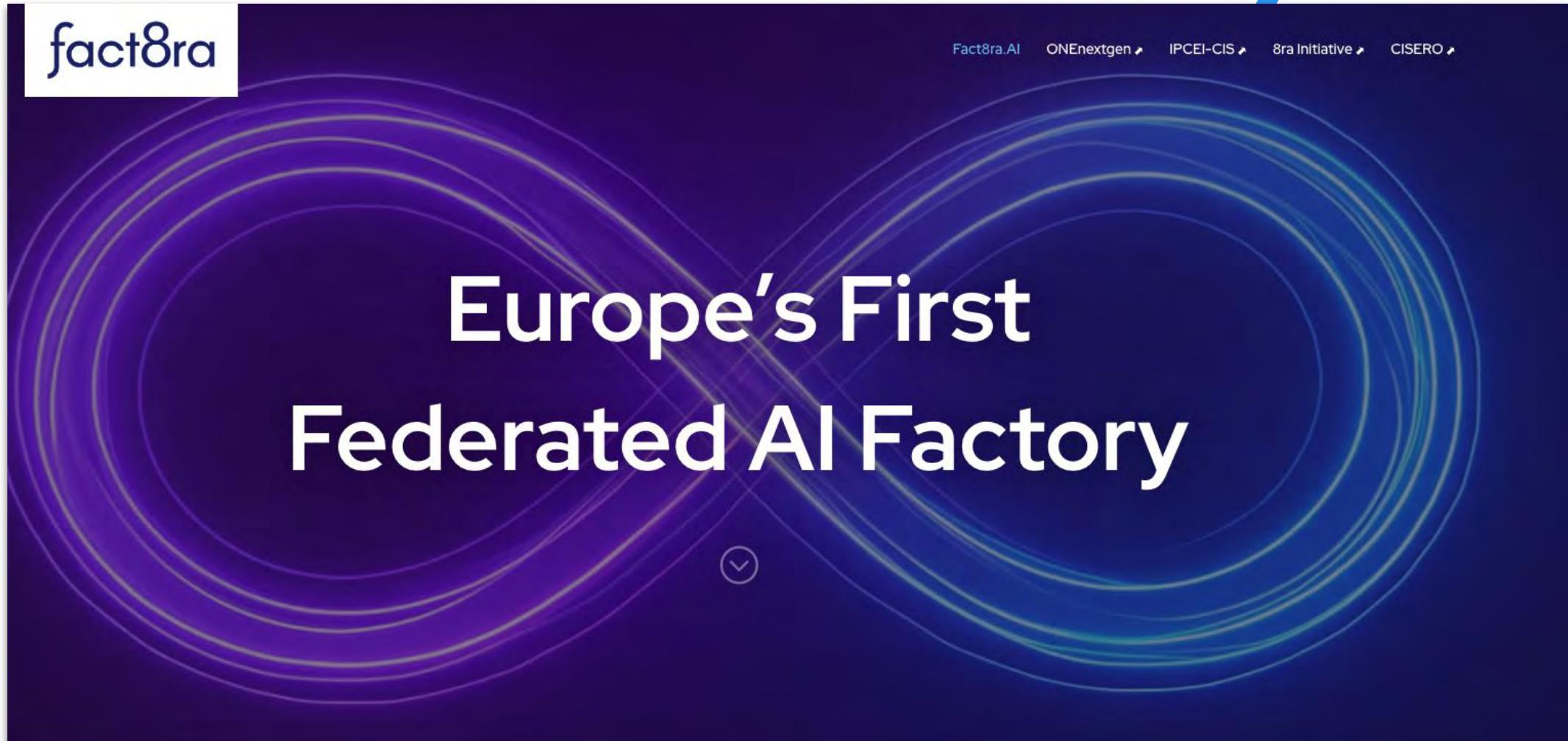
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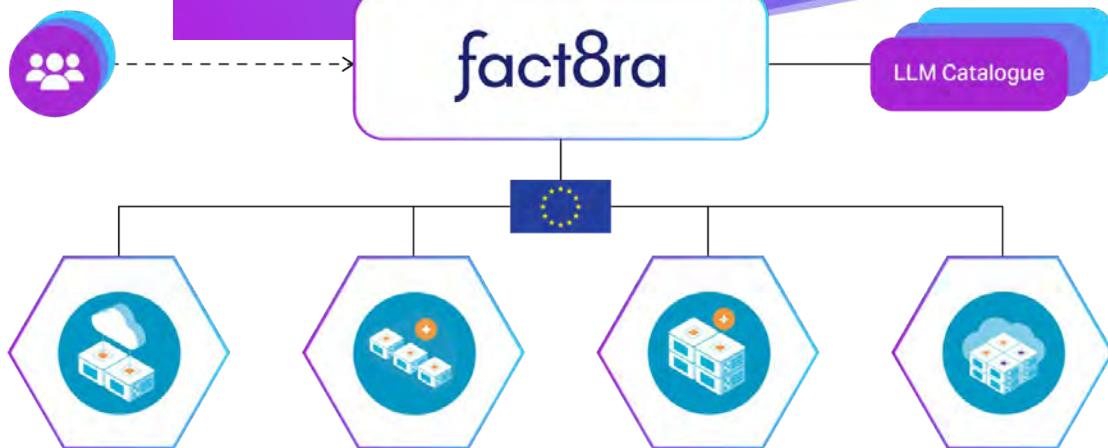
Introducing Fact8ra.AI



Introducing Fact8ra.AI



Introducing Fact8ra.AI



*‘I am glad to see that the **IPCEI-CIS** is delivering on its mission: to develop solutions that are European, open source, and that enable distributed data processing across the multi-provider cloud-edge continuum. While focusing on Research and Development, **IPCEI-CIS** is intended to be close to the market and I particularly note how the deployment of **IPCEI-CIS** integration pilots are demonstrating advanced cloud and edge services and the federation of infrastructure resources across the European Union’.*



Thibaut Kleiner

*Director for Future Networks @ DG CONNECT
European Commission*

Introducing Fact8ra.AI

arsys



IONOS



Introducing Fact8ra.AI

INFERENCE

Deploy your AI models across
the HPC-Cloud-Telco
Continuum.



FINE-TUNING

Customise an AI model
using public datasets or
your own data.

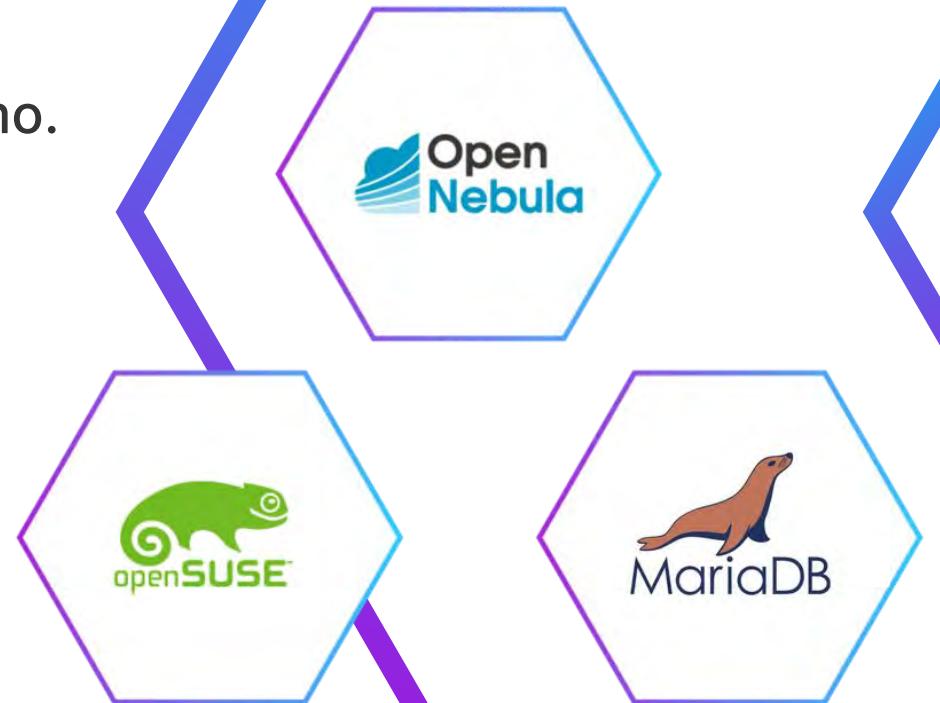


TRAINING

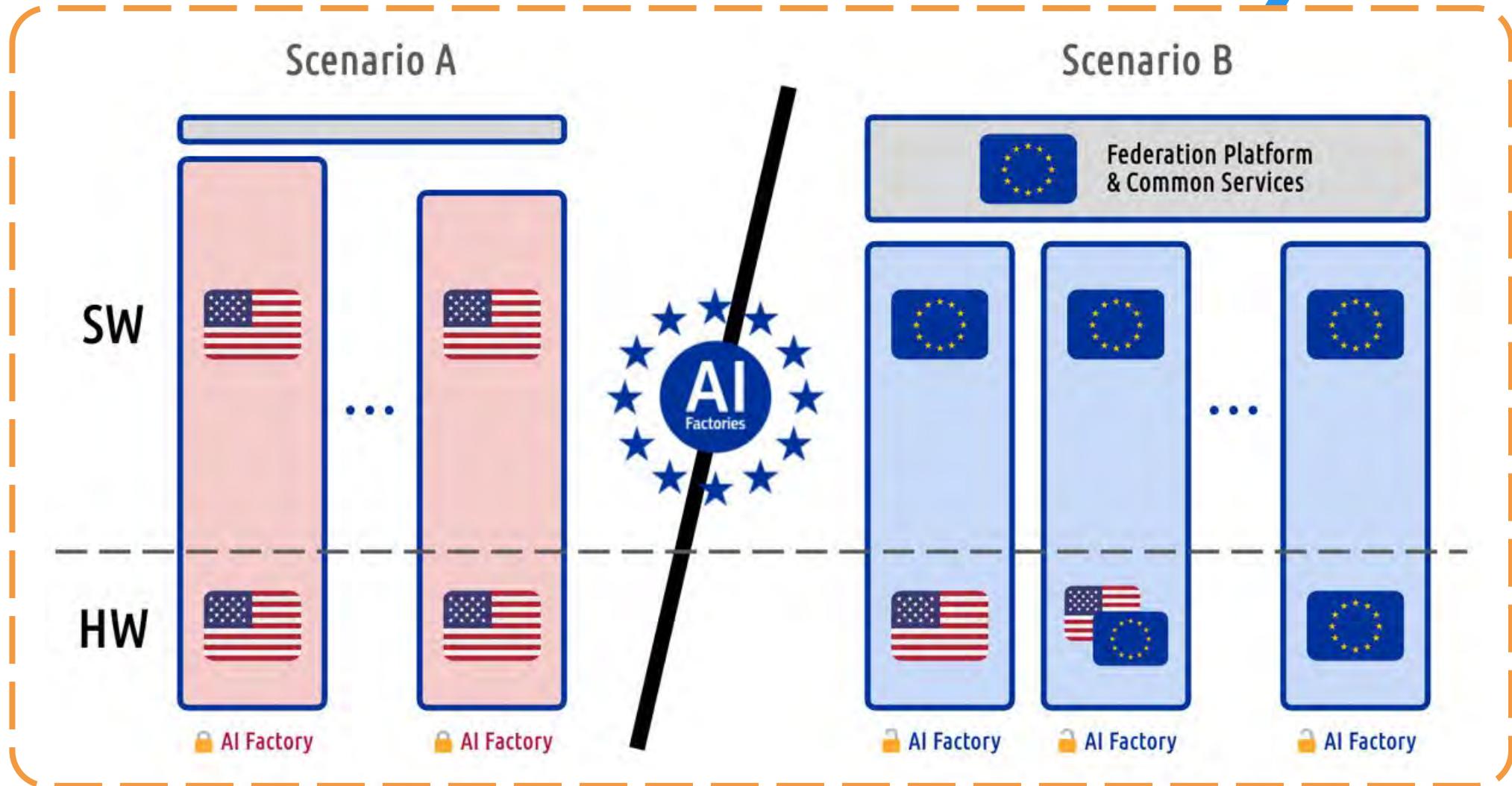
Use a distributed
Edge Cloud Infrastructure
to train your AI model.

Introducing Fact8ra.AI

- ✓ Native support for GPUs (vGPUs, passthrough, MIGs)
- ✓ Support for ARM virtualization.
- ✓ Integration with Hugging Face and NVIDIA NIM.
- ✓ Integration with Ray Appliance and NVIDIA Dynamo.
- ✓ Support for vLLM with OpenAI API compatibility.
- ✓ GPU profiles for LLMs.
- ✓ RAG integration.
- ✓ Multi-GPUs support.
- ✓ Quantization for LLMs.
- 🔧 AI Model Training.



Introducing Fact8ra.AI



Introducing Fact8ra.AI



Digital Sovereignty & Open Source

*<< The IPCEI-CIS participants commit to set up an initial **open-source community***

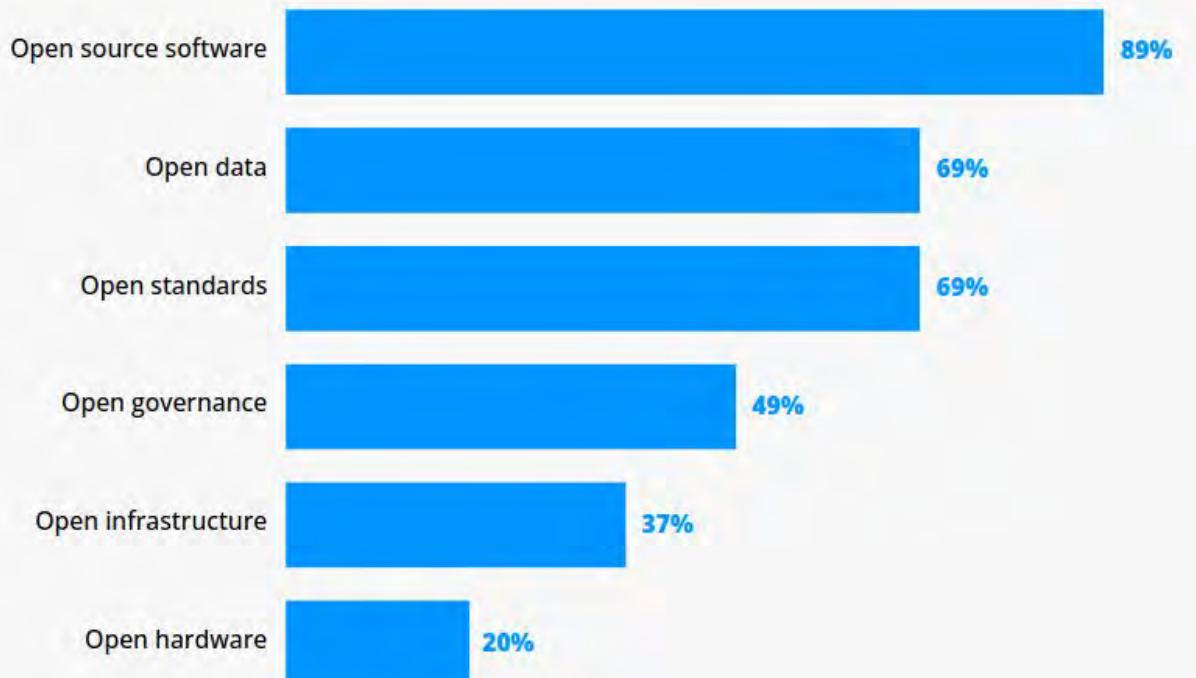
*The IPCEI-CIS direct participants will commit to develop and implement an **open-standard ecosystem and code**. The open-source code ensures independence from the respective implementers, allowing all third parties (and competitors) to utilize and contribute new open-source code and functions. This will allow new innovations and actions to be taken independently of vendor or market limitations. **This is not confined to the development phase of the IPCEI-CIS.***

*The IPCEI-CIS participants will commit to **support and maintain an open approach of the open-source community** (..) This will provide non-discriminatory access for all interested parties (and competitors). As a result, everybody will be enabled to use, edit, and extend the open-source code and benefit from the new functionalities and solutions developed. >>*

Open Source in Europe

Which open approaches do you believe are most critical to advancing Sovereign AI?

SELECT ALL THAT APPLY | Source: 2025 Global Collaboration in AI Survey, Q19, Sample Size = 70, Total Mentions = 232 (Europe only)



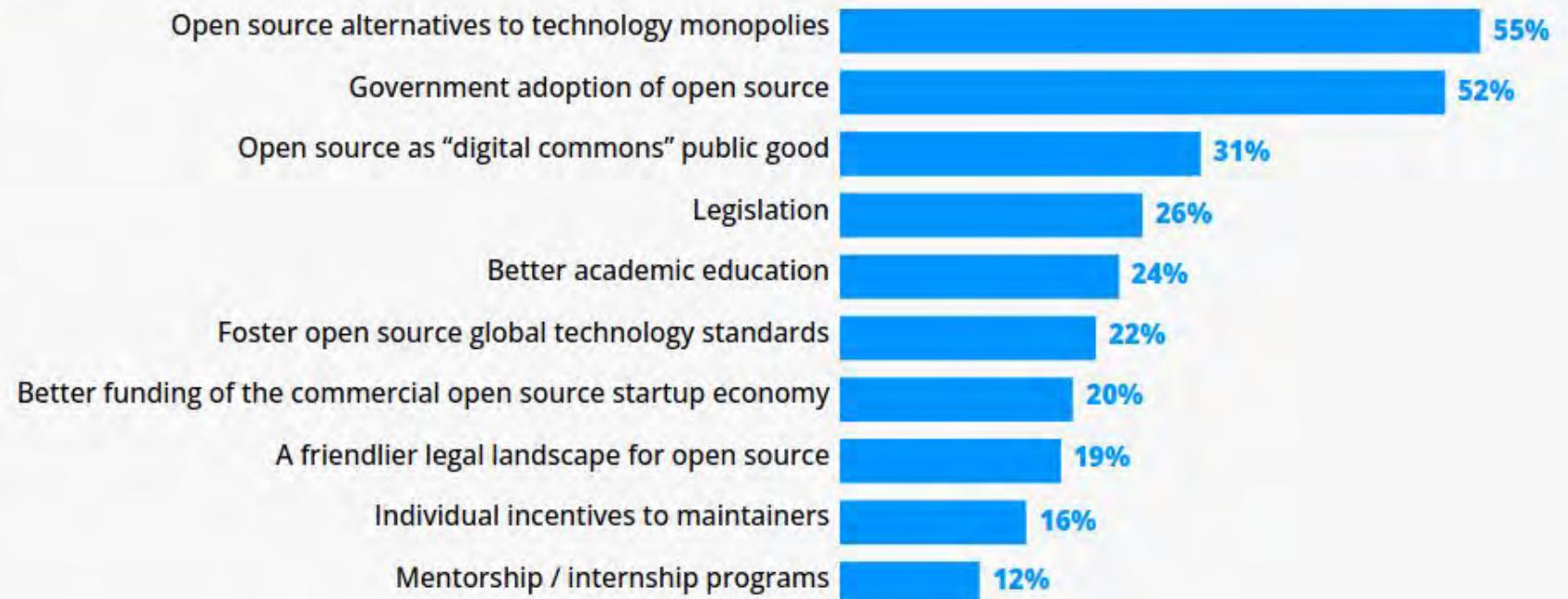
2025 World of Open Source Europe Report: Open Source as Europe's Strategic Advantage (Linux Foundation, August 2025)



Open Source in Europe

In which areas do you think there should be further investment in open source across your geographic region?

SELECT UP TO THREE RESPONSES | Source: 2025 World of Open Source Survey, Q15, Sample Size = 316, Total mentions = 888 (Europe only)



2025 World of Open Source Europe Report: Open Source as Europe's Strategic Advantage (Linux Foundation, August 2025)

The Global Open Source Community...

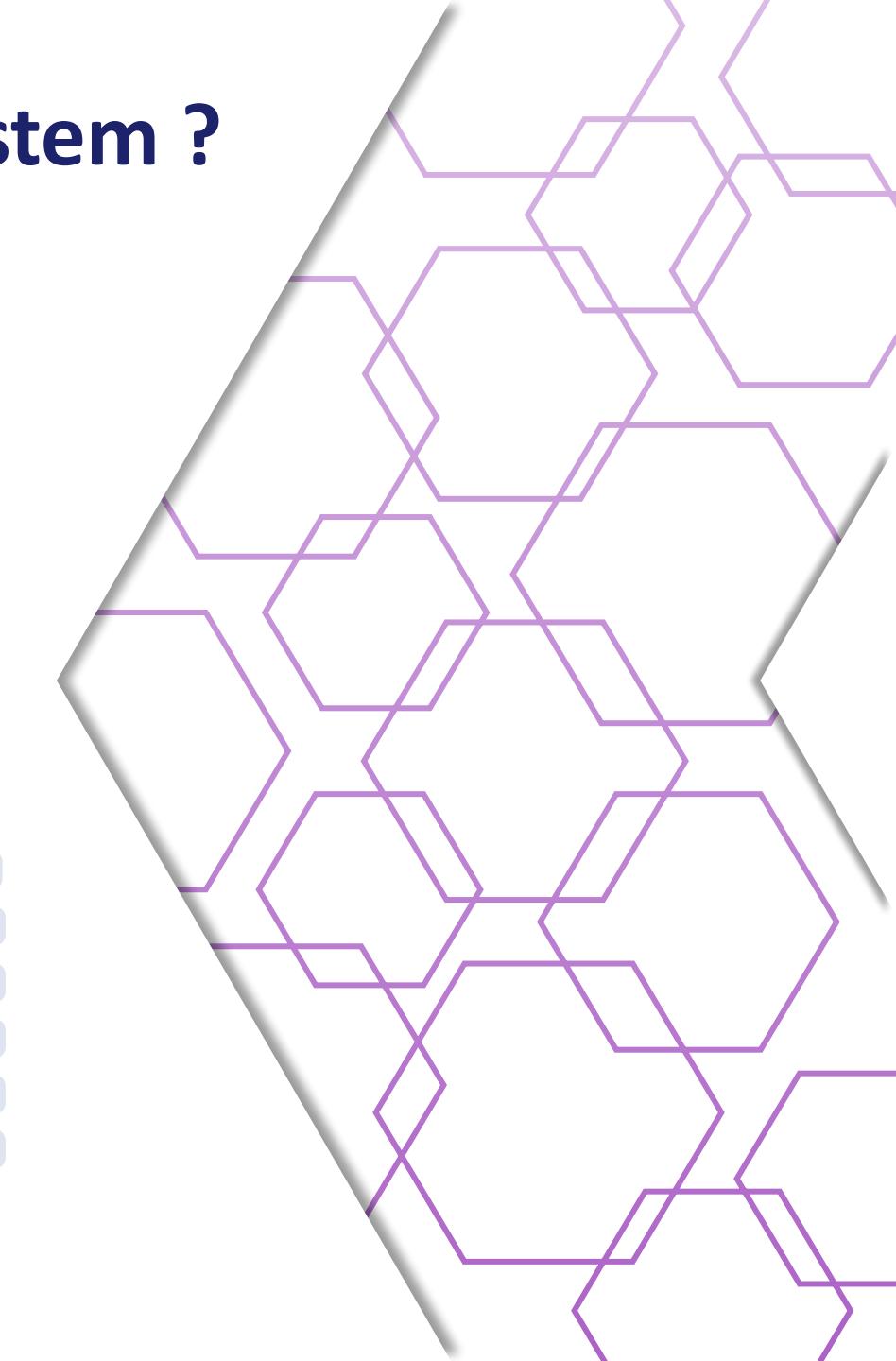
Q Organizations... Industry August 2025

RANK	ORGANIZATION	ACTIVE CONTRIBUTORS	?	TOTAL COMMUNITY	?	
1	Google	6590	+252	13951	+530	>
2	Microsoft	5364	+285	11801	+584	>
3	Red Hat	3908	+168	5771	+187	>
4	Amazon	2465	+173	6039	+384	>
5	Intel	2364	+91	5095	+176	>
6	IBM	2200	+138	5567	+307	>
7	Huawei	2131	+194	4422	+384	>
8	NVidia	1776	+161	3580	+257	>
9	GitHub	1496	+102	3647	+324	>
10	AMD	1344	+105	2855	+160	>



A New European Open Source Ecosystem ?

4iG	Adva Optical Networking	Aecoris	Airbus	Amadeus	Amadeus Data Processing
Amiral Technologies	Amsterdam Internet Exchange	Armadillo	Arsys Internet	ASPIRED	Atende Industries
Atos	Bass	BetterBe	BIT	CGI France	Cloud Ferro
CNRS UT3 IRIT SEPIA	DataVaccinator	DATI Group	DB InfraGO	DE-CIX	Deerns Nederland
Deutsche Telekom	Diagnostični center Bled	Diehl Aerospace	eco Verband	E-Group ICT Software	
elevait	ENEA	ENGIE Laborelec	Engineering Ingegneria Informatica	Ericsson	Eurofiber Nederland
Excellium Services	FH Dortmund	Fincantieri	Fondazione Bruno Kessler	GETEMED	Hashnet
i3D.net	IANUS	Igea	IMCS University of Latvia	Info Support	Infobip
INRIA NANCY – GRAND EST	Institut Imagine	IONOS	Iskra	itrust consulting	Kontron
Lacroix Electronics Cesson	Lacroix Sofrel	Leaseweb	Lindner	Luxembourg House of Cybersecurity	KSB
MONDRAGON	N+P Informationssysteme	NBIP	Ningaloo	No Blue Screen System	Oktawave
OpenNebula Systems	Orange	Phoenix Systems	Politechnika Gdanska	Pro-bit	ProvenRun
Reply SpA	ResEvo	Result	Rheinmetall	Robert Bosch	SAP
Siemens	Siemens Mobility	SYSGO	Telefónica España	Telemach	Tilde
TNO	Université Bretagne Sud	Université Caen Basse Normandie	Universiteit Twente	Ventspils High Technology Park	
Zejn	Université de Lille	Université de Versailles Saint-Quentin-en-Yvelines	WestfalenWIND IT	WRD	



A New European Open Source Ecosystem ?

Federated Open Source Development Infrastructure

- Independent from GitHub and Microsoft Azure.
- Able to host projects by RTOs and European start-ups.

Sovereign Open Source Governance Models

- Projects protected from influence by non-EU parties.
- Fostering solid commitment by EU companies.

New EU Funding Mechanisms for Open Source Projects

- Strategic support to critical open source components.
- Promotion of sovereign stacks responding to market needs.
- Scale up European open source tech providers.

Open Source Research & Innovation Strategy

- Bridge the gap between EU projects and industrial applications.
- Active involvement of public administrations across Member States.
- Build long-lasting trust relationships among EU partners.





IPCEI-CIS

Next-Generation European Platform for the
Datacenter-Cloud-Edge Continuum

Initiative supported by the Spanish Ministry for Digital Transformation and Civil Service through the **ONEnextgen Project: Next-Generation European Platform for the Datacenter-Cloud-Edge Continuum** (UNICO IPCEI-2023-003) and co-funded by the European Union's NextGenerationEU instrument through the Recovery and Resilience Facility (RRF).



Thank you!

