



Open source is in our DNA

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The background of the image shows several European Union flags, each with twelve yellow stars on a blue field, flying from tall, silver flagpoles. Behind the flags is a large, modern building with a glass facade and horizontal blinds. The scene is brightly lit, suggesting daytime.

Research in Europe is all about **Collaboration!**

Photo by [Guillaume Périçois](#) on [Unsplash](#)

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The background of the slide is the European Union flag, featuring a blue field with twelve yellow five-pointed stars arranged in a circle. The flag has a subtle wavy texture.

Why Europe Needs Open Source

Open Source at the world

- **Open source is the main stream**

- Powers cloud, AI, semiconductors, cybersecurity, and more...
- Embodies EU values: openness, trust, collaboration



81%

% companies consuming
open source in products or
services



80-90%

Open source makes up
80-90% of applications



44%

% firms contributing to
upstream open source
projects

Sources: TODO
Group, Forrester

Some insights from Mario Draghi's report

- **Fragmentation $\Rightarrow$ loss of competitiveness**

- Duplication, incompatible standards (telecom, GDPR, railway)
- Fragmentation of financial instruments that prevents large-scale investments
- Fragmentation in energy, innovation, trade, defence politics

- **EU share dropped (22% $\Rightarrow$ 18%)**

- While that of the United States increased (30% $\rightarrow$ 38%)
- Increased global competition

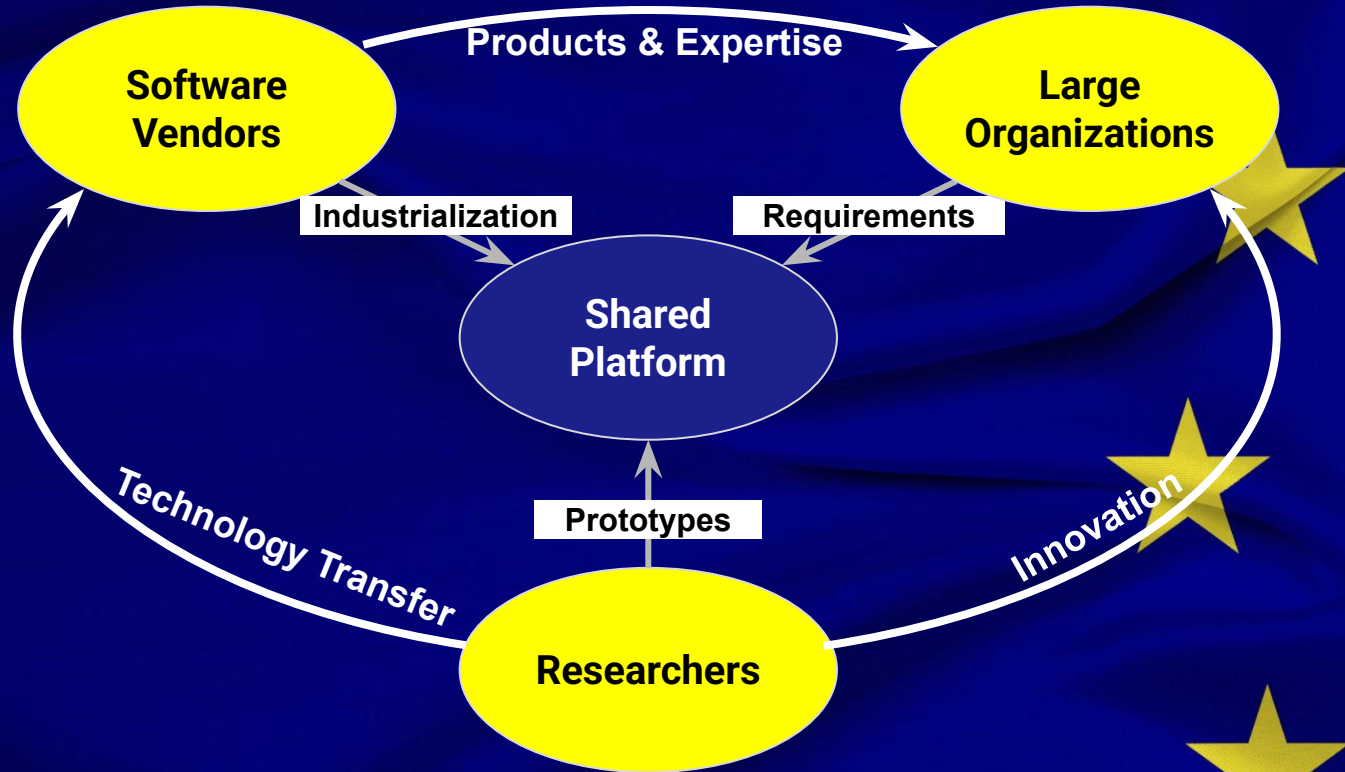
- **UNITY $\Rightarrow$ Multiplier effect**

- Acting together allows the EU to leverage its collective strength (public purchasing power, diplomatic weight, internal market).

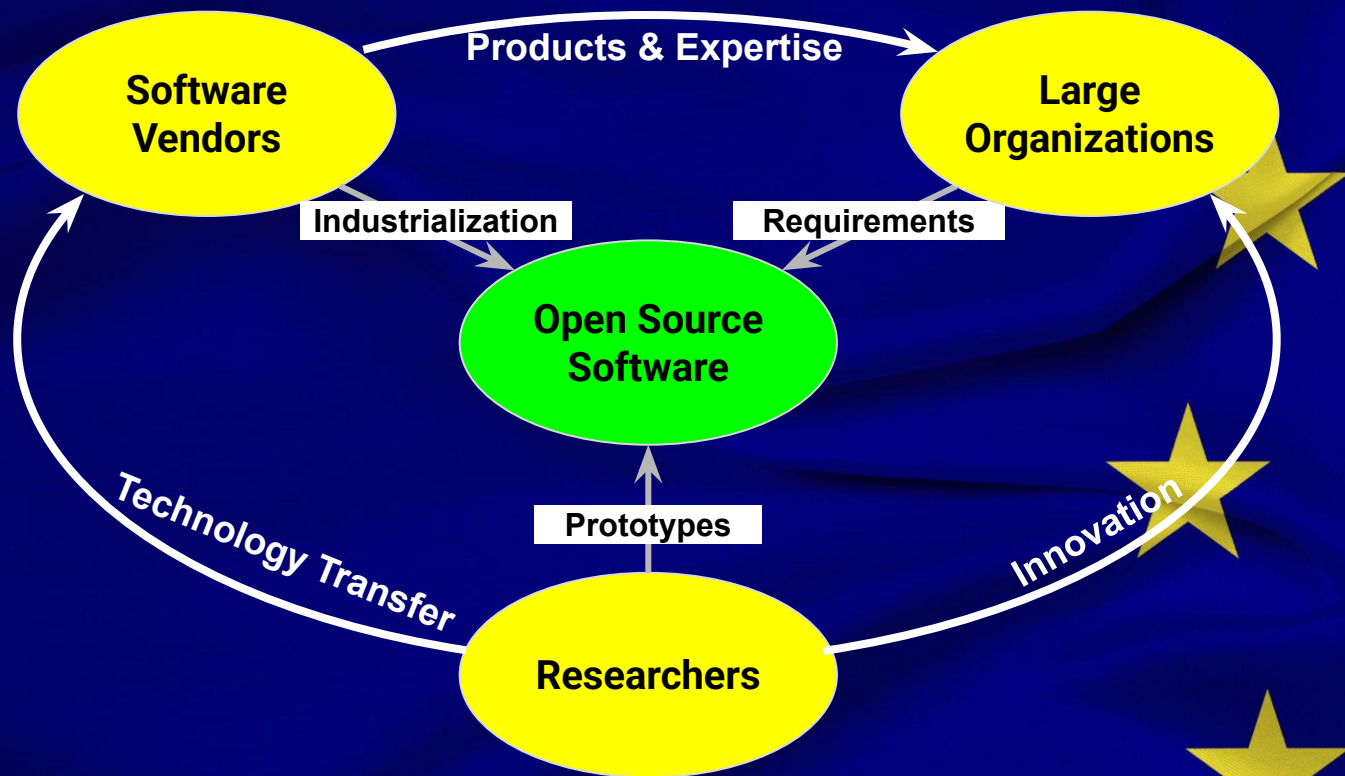
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What Open Source Brings

Research Project Consortium

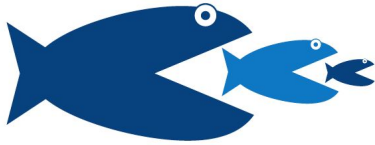


Open Source as a **catalyst** of Research projects

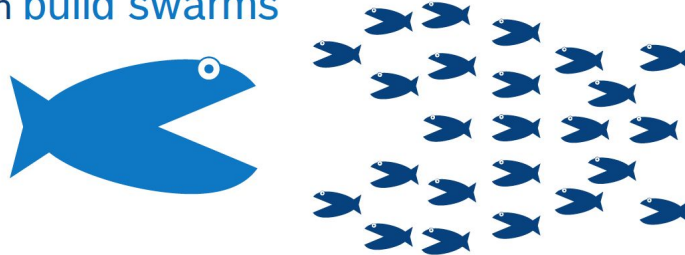


Playing the Platform Game ... and Win

Big fish eat small fishes



... but small fishes
can build swarms



Stefan Ferber
Former CEO

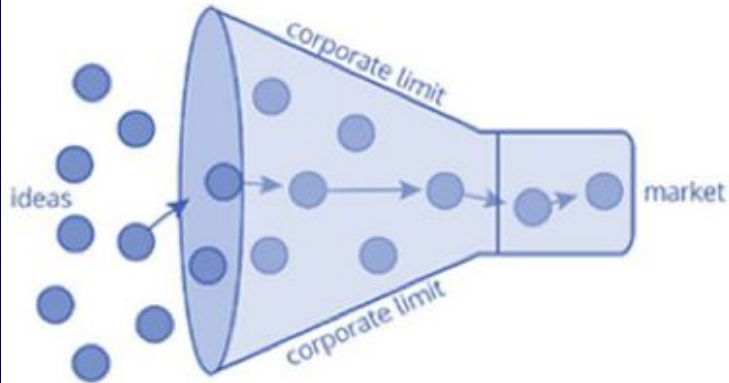


BOSCH

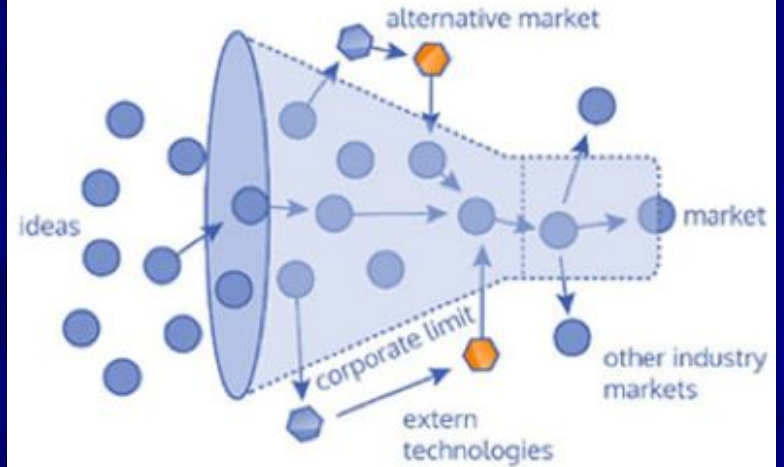
*"No company can realize the IoT on
its own...
Within the **Eclipse Community**,
through the contribution of many
IoT developers, **tools** and **standards**
are created on an **open platform**
that many companies can benefit
from for their IoT applications."*

Close Innovation vs Open Innovation

Closed Innovation Model



Open Innovation Model



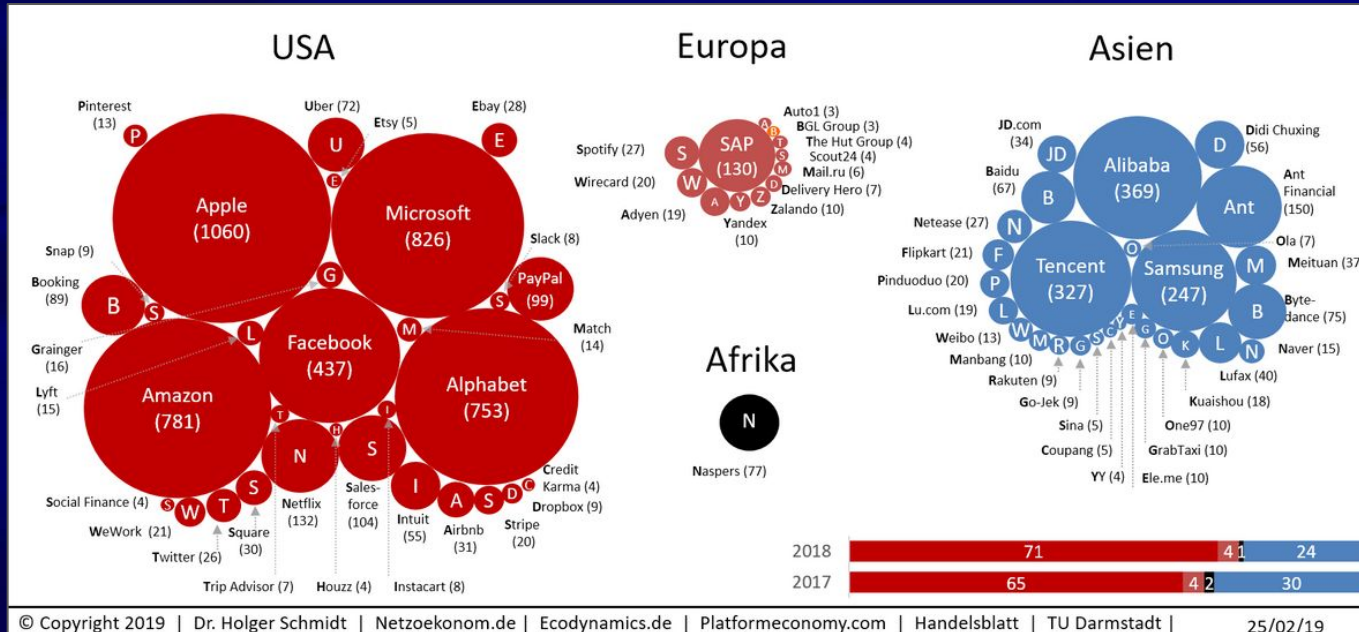
<http://bock-pm.com/service/open-innovation/>

The background of the slide is the European Union flag, featuring a blue field with twelve yellow five-pointed stars arranged in a circle. The flag is shown with a slight wavy texture.

Call to Action: Europe's Path

The Imbalance in the Platform Economy

Caught between China's state-led model and U.S. business-driven ecosystem



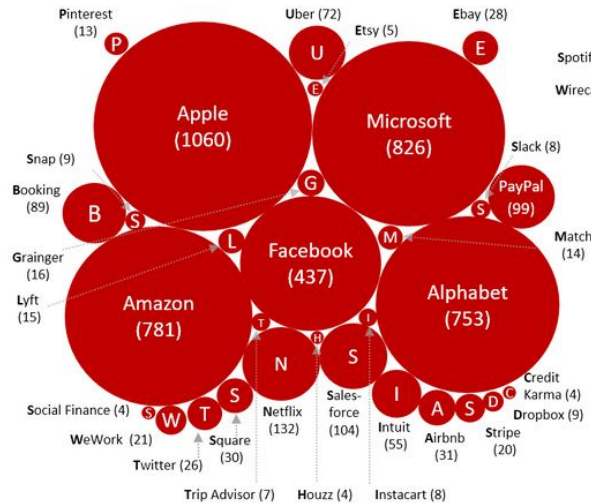
(*) <https://www.netzoekonom.de/2018/05/19/deutschland-landet-im-digital-economy-and-society-index-der-eu-auf-rang-14/>

The Imbalance in the Platform Economy

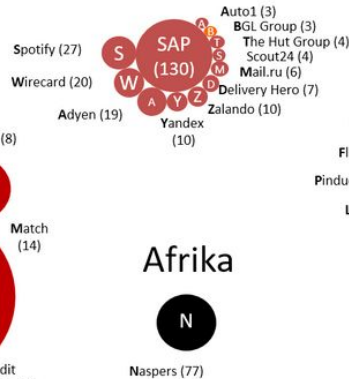
Caught between China's state-led model and U.S. business-driven ecosystem

Who contributes to open source (**)

USA



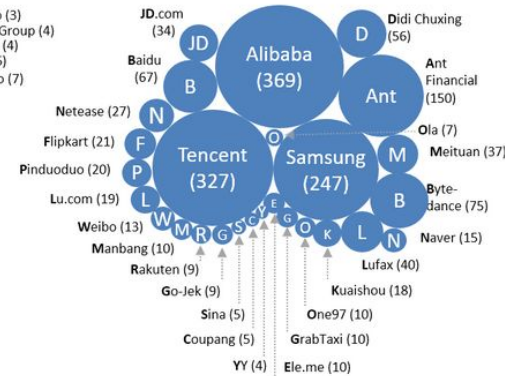
Europa



Afrika



Asien



Company	Employees Contributing
Microsoft	4550
Google	2267
Red Hat	2027
IBM	1813
Intel	1314
Amazon.com	881
SAP	747
ThoughtWorks	739
Alibaba	694
GitHub	676
Facebook	619
Tencent	605
Pivotal	591
EPAM Systems	585
Baidu	584
Mozilla	469
Oracle	455
Unity Technologies	414
Uber	388
Yandex	351
Shopify	345
LinkedIn	343
Suse	325
ESRI	324
Apple	292
Salesforce.com	291
VMware	271
Adobe Systems	270
Andela	259
Cisco Systems	233

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(*) <https://www.netzoekonom.de/2018/05/19/deutschland-landet-im-digital-economy-and-society-index-der-eu-auf-rang-14/>

(**) <https://www.infoworld.com/article/3253948/who-really-contributes-to-open-source.html>

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Where does Europe stand in this race?

Open source dilemma in the EU too: many see benefits, too few contribute

Advantages of open source software are recognized by many EU organizations, according to the Linux Foundation. There is a lack of contributions to development.



(Image: Imilian/Shutterstock.com)

Aug 28, 2025 at 9:17 pm CEST 4 min. read | iX Magazin

By Udo Seidel

- **Recognition vs. Contribution:**

- Many EU organizations see open source benefits, but **few actively contribute**—only 34% have a strategy and 22% a dedicated unit (OSPO).

- **Digital Sovereignty:**

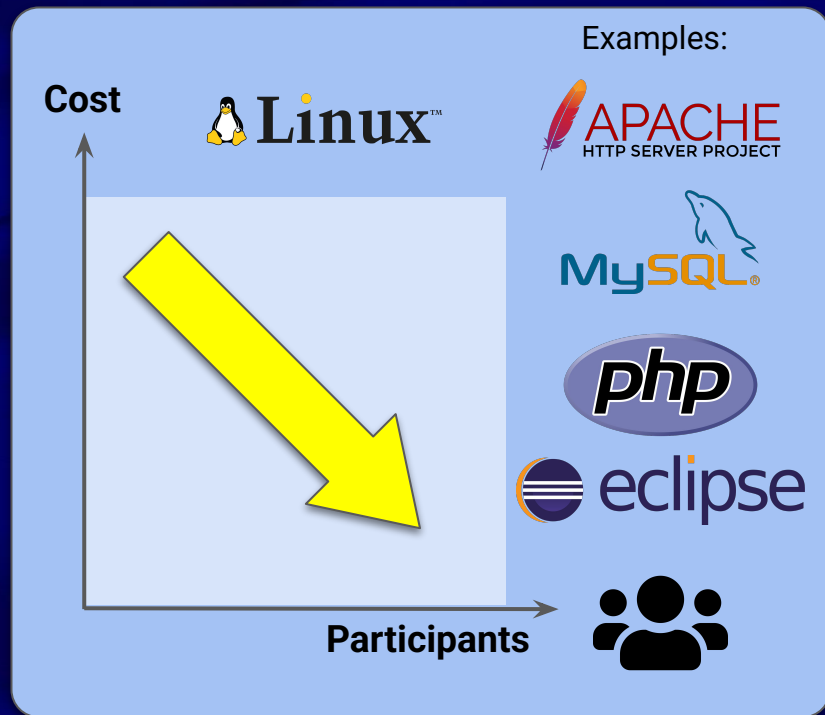
- Open source is key for EU digital autonomy, yet investments, strategies, and political coordination are lacking.
-

- **Management Gap:**

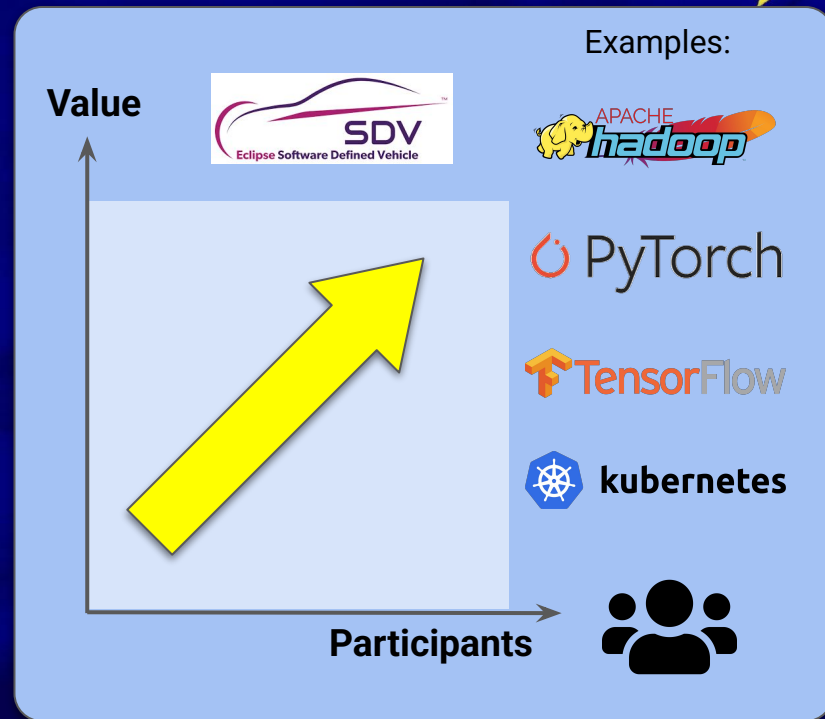
- 86% of staff see its value, but only 62% of top management do.

The shifting impact of Open Source

Before: Commoditization strategy



Now: how Innovation happens



Europe at a Crossroads: Sovereignty and Competitiveness

- **EU must define its own path to digital sovereignty**

- Set **standards**: “If you don’t set standards, you are following them”
- Build Strong **Communities**
- Demonstrate **Value**
- **Facilitate** Implementation



- Address **competition**
- Engage with **Regulators**



- **Open source is a strategic lever for competitiveness & resilience**

Take away...

- ★ Free technologies $\Rightarrow$ European Digital Commons
- ★ Open Source $\Rightarrow$ European Game Changers
- ★ Open Source $\Rightarrow$ in European DNA

**Europe should Invest, Build, and Support
Open Source**

White paper on the role of Open Source in Europe



- EU Sovereignty and Competitiveness
- Artificial Intelligence (AI)
- New Regulations on Hardware
- The Emerging Fourth Sector
- Geopolitical Tensions
- The Skill Shortage



eclipse.org/research/



Thanks!

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RESEARCH @

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FOUNDATION