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Towards European open digital ecosystems

Feedback by APELL – The European Open Source Software Business Association

3 February 2026

APELL – The European Open Source Software Business Association and its members represent hundreds of Open Source businesses with a collective turnover in the order of several tens of billions of euros each year, among them mostly SMEs, some large companies, as well as public administrations, research institutions, and individuals throughout Europe.

Open Source is based on **granting the freedoms to use, study, share, and improve** technology based on it. These freedoms are granted by way of an Open Source licence. 90% of business software projects are based on Open Source¹, Open Source components are present in 70-90% of software globally², and more than 65% of businesses contribute to Open Source³.

APELL welcomes the Commission’s planned Communication “Towards European open digital ecosystems”, and to update the Commission’s Open Source strategy. **Only Open Source guarantees full digital sovereignty** and therefore realises broader policy objectives of the European Union before the backdrop of rising international tensions.

Open Source delivers on the objectives of **strengthening control** over digital infrastructure, providing users with choice, while reducing **dependencies** and **avoiding vendor lock-in, increasing interoperability**, and allowing users to **switch service providers**. In addition, only Open Source products and services provide meaningful, **independent influence of the design** of digital technology our society and industry rely on. This is in particular also relevant in the case of **foreign mergers and acquisitions**.

The Communication has the potential to leverage the **strategic advantage** that Open Source innovation guarantees – and the power of the ecosystem of businesses and developers that underpin it. This includes improvements to **supply chain transparency, reliability, and compliance**, and strengthens Europe’s capacity and capability to boost digital innovation and global competitiveness.

1 Butler et al., Considerations and challenges for the adoption of open source components in software-intensive businesses, *Journal of Systems and Software*, 186 (2022) (<https://www.sciencedirect.com/science/article/pii/S0164121221002442>)

2 Nagle et al., Census II of Free and Open Source Software – Application Libraries, *Linux Foundation, Harvard Laboratory for Innovation Science (LISH) and Open Source Security Foundation (OpenSSF)*, 80 (2022) (<https://www.linuxfoundation.org/research/census-ii-of-free-and-open-source-software-application-libraries>)

3 Blind et al., Estimating the GDP effect of Open Source Software and its complementarities with R&D and patents: evidence and policy implications, *The Journal of Technology Transfer*, 49 (2024) (<https://link.springer.com/article/10.1007/s10961-023-09993-x>)

APELL's responses to the Commission's key questions

1. Strengths and weaknesses of the Open Source sector, and existing barriers

The foreseen revision of the public procurement framework is an important lever for the EU to **stimulate open, sustainable innovation**. The revision should take into account the specific characteristics of Open Source business models that differ from proprietary businesses. Award and selection criteria must prioritise the long-term sustainability of public investment over price, by giving priority to vendors that are actively contributing to the maintenance of the chosen Open Source solutions⁴.

The European ICT sector in general, and Open Source businesses in particular are characterised by a prevalence of start-ups, micro- and SMEs. As such, minimum turnover criteria and hurdles to forming consortia can constitute barriers.

Restricted access to and availability of standards and specifications, standard-essential patents, and a lack of meaningful access to and representation of the Open Source ecosystem in standard-setting bodies can curb Open Source innovation⁵.

Furthermore, a fragmented funding landscape, and general hurdles in access to funding, as well as the varying or unclear commitment of governments and authorities in shifting to Open Source, as well as a varying or unclear level of knowledge of Open Source solutions hamper Open Source uptake.

2. Added value of Open Source for public and private sectors

Open Source solutions are characterised by the Open Source licence under which they are developed and distributed. The freedoms granted by the licence and the open development model allow the free choice of a service provider, and have advantages for reliability and security (by way of, in particular, transparency, reproducibility, verifiability) over proprietary solutions. Over the last forty years since the start of the movement, Open Source innovation has created a **value estimated at \$8.8 trillion**⁶.

The German **openDesk**⁷ project is a suite of e-mail, video conferencing, chat, document, knowledge, and access management on the basis of Open Source products from various European partners, most of them the original developers or main contributors to those Open Source projects. OpenDesk already reaches more than 160.000 users⁸. Managed by a public

4 see APELL's submission to the evaluation of the public procurement directives, submitted 27 February 2025: https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14427-Public-procurement-directives-evaluation/F3522562_en and <https://apell.info/2025/02/20/apell-submission-public-procurement-directives-evaluation/>

5 see APELL's submission to the call for evidence for a revision of the Standardisation Framework, submitted on 18 July 2025: https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14511-Standardisation-Regulation-revision/F3581190_en and <https://apell.info/2025/07/18/more-openness-in-european-standardisation/>

6 Hoffmann, Manuel and Nagle, Frank and Zhou, Yanuo, The Value of Open Source Software (January 1, 2024). Harvard Business School Strategy Unit Working Paper No. 24-038, Available at SSRN: <https://ssrn.com/abstract=4693148> or <http://dx.doi.org/10.2139/ssrn.4693148>

7 openDesk by ZenDiS: <https://www.opendesk.eu/en/product>

8 "openDesk: Interview mit ZenDiS-Chef Alexander Pockrandt über die Entwicklung", heise online, 8 October 2025: <https://www.heise.de/hintergrund/openDesk-Interview-mit-ZenDiS-Chef-Alexander-Pockrandt-ueber-die-Entwicklung-10733246.html>

undertaking, it is primarily available to the public sector, but private sector offers are being developed by various providers, permitted by the Open Source nature of the solution.

Consul Democracy⁹ combines various Open Source software into a solution easily employed by local governments and administrations. As a *public sector open source project*, it is an example of joint development of the public sector with an Open Source project, benefiting from the advantages of accountability, transparency, and traceability for democratic decision-making afforded by the freedoms the Open Source nature grants.

The **SEAPATH project**¹⁰, hosted by Linux Foundation Energy, develops an industrial grade real-time platform as Open Source, allowing various private sector entities to benefit from standardisation and commodification through Open Source.

3. Measures and Actions to support development and growth

As a consequence of the smaller size of Open Source providers, solutions are often less known. APELL recommends to explore actions to increase visibility, e.g. by publishing success stories and speaking at sector-specific events, though the establishment of solution catalogues, the creation of buyer networks, and **establishing Open Source Programme Offices** (OSPOs) throughout Europe as a means to institutionalise Open Source knowledge and capability. This should be accompanied by instating education programmes for authorities and procurers, and awareness-raising campaigns for Open Source in the public sector. Additionally, joint development and public sector open source projects¹¹ can increase external, as well as internal visibility.

Open Source innovation relies on the **free and open availability of and access to standards, specifications, and standard-essential patents**. Requirements of membership, or payment for documentation and standards are not compatible with the open development and distribution model of Open Source, and must be removed where digital sovereignty goals are pursued. The Commission and Member States must effectively promote interoperability by appropriately adapting the legal framework to require free and open access for the Open Source development and business ecosystem (“enforceable interoperability”).

To counter the fragmented funding landscape, and unclear commitment of governments and authorities mentioned in above (1. Strengths and weaknesses of the Open Source sector, and existing barriers), APELL recommends to increase awareness of the benefits of Open Source for the public and private sector in the funding, investment, and financing landscape, the establishment of concrete and broad plans for the public procurement of Open Source solutions.

APELL recommends furthermore that binding targets be introduced for the procurement of Open Source products and services, combined with a constant evaluation and, where necessary, evolution of such rules. APELL recommends to introduce a **minimum of 20% Open Source with the revision of the public procurement framework**, and increase this target gradually to achieve 100% Open Source procurement by 2035¹².

9 Consul Democracy: <https://consuldemocracy.org/>, Platform “Unser München” of the German city of Munich: <https://unser.muenchen.de/>, Platform “Decide_Madrid” of the Spanish capital city of Madrid: <https://decide.madrid.es/>

10 LF Energy SEAPATH: <https://lfenergy.org/projects/seapath/>

11 see the study “Open Source Software Adoption and Reuse in European Local Governments: A Multiple-Case Study” published by the Open Source Observatory, 29 September 2025: <https://interoperable-europe.ec.europa.eu/collection/open-source-observatory-osor/news/multiple-case-study-public-sector-open-source>

Open Source is an opportunity in **education, training, and research**, and should be the default in building skills, and to attract talent in Europe.

4. Technology areas to be prioritised

The **development of Open Source projects requires infrastructure**, such as hosting, version control, bug tracking, feature requests, task management, as well as continuous integration including build, testing, and publishing environments. This could particularly benefit public sector open source projects and joint developments across Member States and different authorities, and lead to more internal and external visibility and awareness.

In the area of open data and public sector information, access to data must be increased and made easier by making data available under open, standardised, and commonly used licences that are **compatible with Open Source licencing and development practices**. This also increases legal certainty for partners involved in relevant products and services.

In line with the broader policy objectives of the EU of **strengthening capacity and capability in the digital sector**, and increasing global competitiveness, the investment in Open Source software, Open Source hardware designs and production, and new technologies like Open Source Artificial Intelligence should be prioritised, and realised e.g. through public sector open source projects, and by making available, or easing access to, funding for Open Source innovators.

5. Sectors that benefit from Open Source

The **digital sector** already benefits from Open Source, as evidenced by the finding that 90% of business software projects depend on Open Source¹. **Producing industries** can benefit from reducing dependencies and vulnerabilities in case of international trade pressure, by bringing back value creation in-house, and by diversifying investments to Open Source technology providers. In **defence, finance, and health**, investments into Open Source particularly strengthen security and safety, trust, reliability, and reproducibility. The scientific method depends on public availability of research and the possibility to verify, falsify, and reproduce research. In the same vein, **research and education** benefit from the ease of access to, and the openness of Open Source technology, and allows for easier pathways of commercialising developments within an established ecosystem.

As ICT technology is foundational infrastructure **across sectors**, the overall benefits of increased digital sovereignty through Open Source apply cross-cutting as well. APELL recommends building OSPOs (see above) that can play an important role in institutionalising Open Source knowledge in all sectors.

The European Union, its Member States, and citizens rely on Open Source as Digital Public Infrastructure. As such, policy in the EU must be shaped to maintain and contribute to it in the long-term interest of society, economy, and democracy. In realising its responsibility for the infrastructure, public authorities and public servants must also be granted the ability to contribute to Open Source projects themselves where this complements public-private cooperation projects by **instating source code contribution policies**, giving contributors from the public sector more legal certainty. Where the development of new products and services, or

¹² see APELL's submission to the public consultation on the Cloud and AI Development Act, submitted on 3 July 2025: https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14628-AI-Continent-new-cloud-and-AI-development-act/F3571855_en and <https://apell.info/2025/07/07/100-percent-open-source-by-2035/>

of improvements, modifications, and customisations are procured, they must be Open Source by default, following the “Public Money, Public Code”¹³ principle.

APELL furthermore supports the establishment of a **European Sovereign Tech Fund**, following the example of the Sovereign Tech Fund in Germany¹² to complement other measures

Conclusion

Open Source contributes uniquely to the broader policy objectives of the European Union across sectors, by increasing control, reducing dependencies, and providing long-term sustainability of public and private investment. The European Union has the opportunity to use several of the instruments currently under review or in preparation, to stimulate growth of the Open Source industry and thereby to increase competitiveness and innovative power. By taking decisive steps in raising awareness for digital sovereignty through Open Source, institutionalising Open Source knowledge and capability, stimulating Open Source growth through public procurement, and realising the EU’s and governments’ responsibility to maintain, and contribute to the Open Source Digital Public Infrastructure the Commission can now leverage the opportunity and the strategic advantage of Open Source for the benefit of European global competitiveness.

On behalf of

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¹³ Public Money, Public Code (campaign by the Free Software Foundation Europe):
<https://publiccode.eu/en/>

APELL

Association Professionnelle
Européenne du Logiciel Libre

The European Open Source
Software Business Association

APELL (Association Professionnelle Européenne du Logiciel Libre ASBL) is Europe's Open Source Software Business Association. Founded in 2020 to bring national Open Source Software organisations together into a European network to provide them with peer support and collective marketing, as well as capacity building and policy support for public affairs, both nationally and on the EU-level. APELL aims to increase opportunities for the members of the Association's member organisations, and to increase value and advancement for customers in both the public and the private sectors. At the same time, we see a real need to bring the Open Source perspective into the discussions on the shaping of Europe's digital future.

We support the digitisation of the economy and society – but it matters how we digitise. APELL promotes a sovereign, inclusive, ethical digital market. In order to achieve this, Europe's digital future should be based on Open.

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