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Digital Sovereignty
starts at home

The world is changing

Where we stand today

Major global economies increasingly seek to reduce strategic dependencies in critical digital infrastructure.

Many countries are developing frameworks that prioritize

- **resilience,**
- **operational trust and**
- **greater technological autonomy.**



The Paradigm Shift

Why Sovereignty is the New
Strategic Frontier for Europe

RESILIENCE
TRUSTWORTHINESS
STRATEGIC INDEPENDENCE

PERFORMANCE
PRICE
SPEED OF DEPLOYMENT

Survey on router trust

Country level results

Based on online interviews with YouGov panel members; data weighted and representative of the countries adult population (18+).



Management Summary

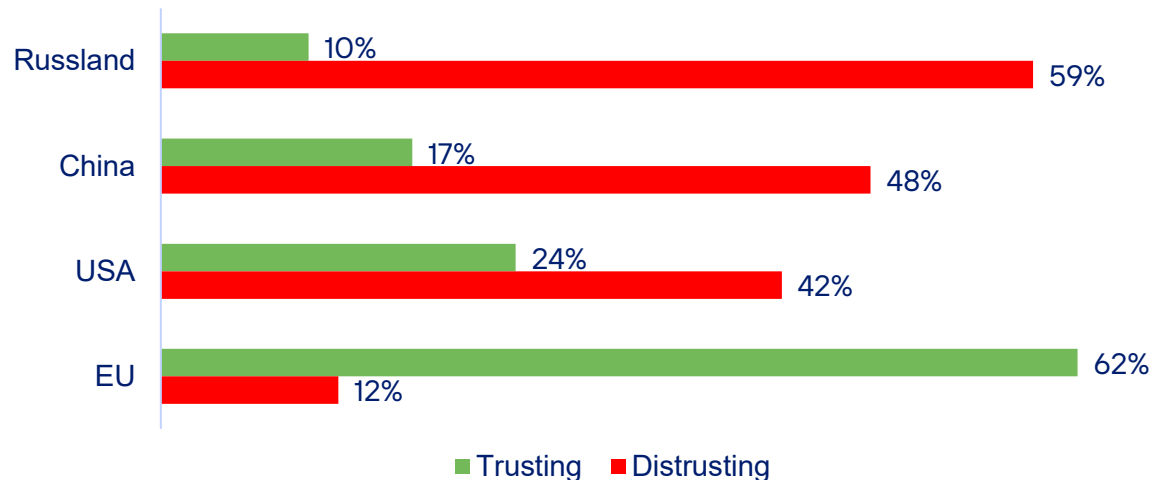
- **Clear trust bias toward European manufacturers**, while vendors from certain non-European regions face significantly higher skepticism.
- **"Made in Europe" acts as a strong purchase driver**, especially in light of geopolitical sensitivities.
- **Brand origin is often unclear**: indicating low country-of-origin awareness.
- **ISP-provided devices are perceived as European by default**, regardless of actual production origin.

YouGov | Survey on router trust

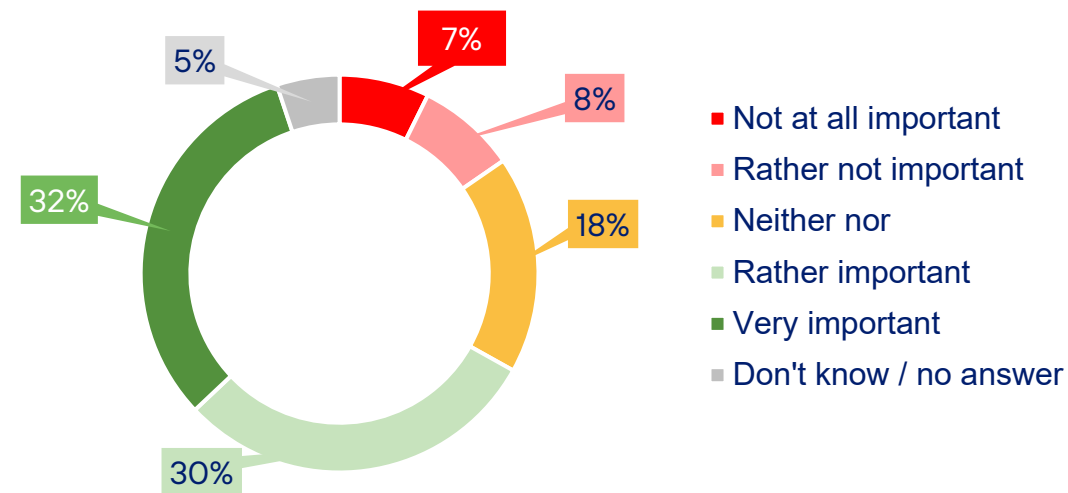
Country level results

Austria

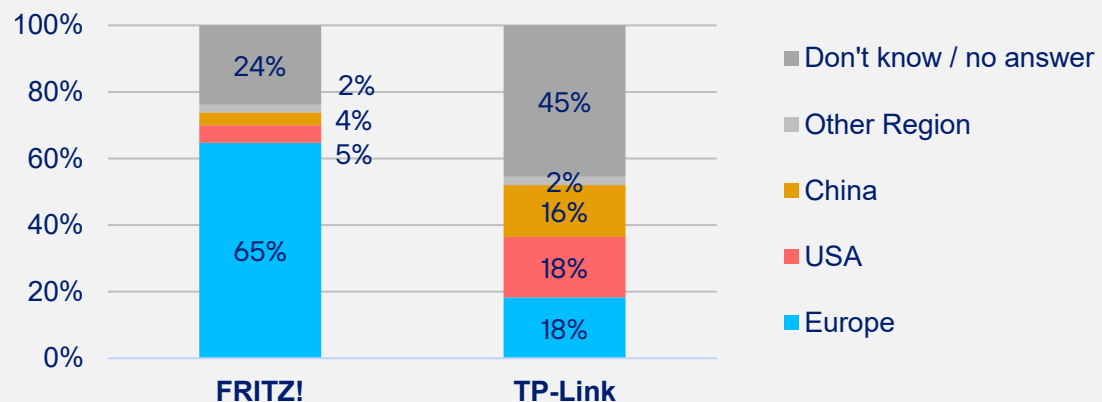
How much do you **trust or distrust router manufacturers** from the following countries and regions?



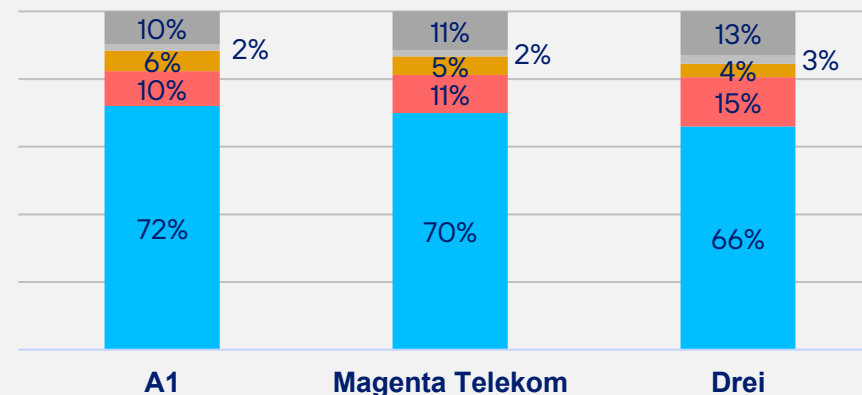
Consider the current geopolitical developments. **How important** would it be to you to have a router and extender that are "**Made in Europe**"?



Which **country or region** do you think the following **router manufacturers** are from?



Which **country or region** do you think the **router manufacturers** for the following **internet service providers** come from?



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The demand for integrated digital security

85%

perceive security as an integral part of their internet service offering



The Expectation of Managed Security

Research indicates that the vast majority of **consumers associate their digital security with their service provider.**

The Home Gateway: The Sentinel

The First Line of Defense

The router is no longer just a connectivity box; it is the "**Front Door**" of a user's digital life. It handles the **security of every IoT device, smartphone, and laptop in the home.**

A sovereign gateway ensures that the **initial point of entry** is controlled by **trusted European technology**, not third-party black-box systems.





The Pillars of Digital Sovereignty



Hardware Control

Ensuring transparency in the hardware supply chain and reducing critical dependencies on non-EU entities.



Software Autonomy

Proprietary software developed and maintained locally, ensuring back-door-free environments. You can't secure what you can't Control



Data Residency

Keeping sensitive user telemetry and personal data within European jurisdictions and standards.

Connected devices are increasingly targeted

Common Challenges

Weak default configurations

Exploitation of known vulnerabilities

Delayed software updates

Large scale botnet attacks

The Risk Landscape

A poorly secured device can become part of a much larger attack infrastructure



What creates Trust

Trustworth Digital Infrastructure

Trustworthy digital infrastructure requires **resilience, transparency, and long-term reliability** across the entire technology lifecycle.

- Long-term software support & reliable update policies
- Transparent security processes & strong data protection
- Regulatory compliance & clear accountability
- Trusted supply chains for digital sovereignty and resilience



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Everything for the home network



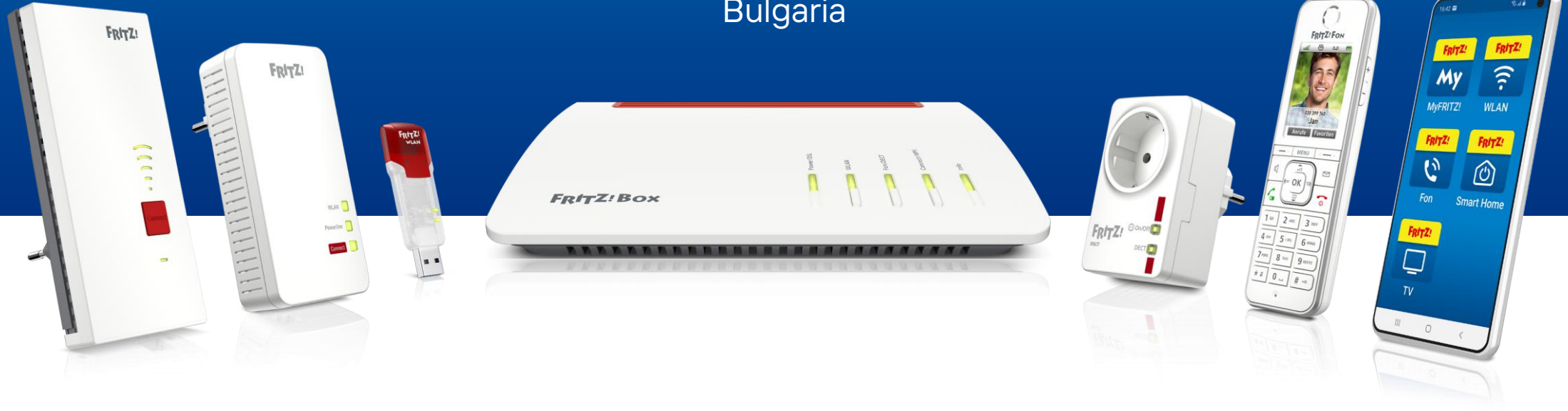
Founded in Berlin in 1986



Development in Berlin
Production in Europe:
Poland, Germany, Hungary,
Bulgaria



Outstanding security (0 CVSS
incidents since 2019)



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Thank you

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