

# **Investigating a Workplace Technology Stack for small and medium businesses without US-based suppliers.**

**A research report for CTOs and IT Leaders** | March 2025

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## Introduction

In December 2024, Russia's communications authority, Roskomnadzor, blocked access to major foreign technology platforms - including Google, YouTube, Telegram, and WhatsApp - in regions such as Dagestan, Chechnya, and Ingushetia. These tests were part of Russia's broader effort to develop a "sovereign internet," ensuring domestic control over digital infrastructure in the event of global disconnection.

At the same time, the US has intensified export controls to restrict access to critical technologies. Since February 2022, following Russia's invasion of Ukraine, the US Department of Commerce's Bureau of Industry and Security (BIS) has imposed strict measures limiting Russian and Chinese access to semiconductor technologies, AI chips, and other dual-use components. These restrictions aim to curtail military and surveillance capabilities and recently hit the headlines when China's new Deepseek R1 large language model was reported to be trained on Nvidia's H800 GPUs, which are an export modified version of the widely used and allegedly more powerful H100 chip.

Beyond these geopolitical tensions, digital sovereignty is also shaping procurement policies. Germany, for example, has enacted legislation known as OZG 2.0 (Onlinezugangsgesetz or Online Access Act), which requires government agencies to prioritize open-source software and reduce reliance on non-European IT providers. While framed as a security measure, this shift signals a growing preference for regional digital self-sufficiency - a trend that could expand in scope.

As technology leaders, we sometimes have to ask ourselves "*what if the worst happened*", rather than "*what would we like to happen*". That question is the inspiration for this research. The relationship between Europe and the US remains strong, but what if it were to shift? If economic or political strains led to tariffs, export restrictions, or even - however unlikely - a Russian-style internet disconnection, how reliant are European companies on American technology?

The simple answer that we discovered: **very**. Almost every organisation relies on Microsoft or Google for email. Most search with Google, sell with Salesforce, and work on Macs, iPhones, Dell laptops, and Android devices. We use Notion and Slack to collaborate. Our cybersecurity is safeguarded by firms like Okta, Palo Alto Networks, and CrowdStrike. Many of the best workplace technologies in the world are built by teams with US HQs.

For small and medium-sized businesses (SMBs), these geopolitical shifts raise important questions about vendor dependency, resilience, and technology risk mitigation. This study explores whether a viable non-US workplace technology stack exists and how it compares in usability, cost, and integration with existing workflows.

So, what if that access to US tech was suddenly cut off? Could European businesses still function in a world without American technology?

**That's the question we set out to explore.**

## Summary

This research examines the feasibility of assembling a workplace technology stack without reliance on US-based software and hardware. The objective was to identify alternatives suitable for small and medium-sized businesses (SMBs), focusing on user experience, security, and interoperability.

## Key findings

- A viable non-US software stack is achievable, with strong alternatives such as ProtonMail (Switzerland) for email, Atlassian (Australia) for collaboration, and Xero (New Zealand) for accounting.
- The non-US tech stack is comparative in cost to a US-tech stack; for similar components, the non-US stack that we selected cost £47 per user per month, splitting the difference between Google based stack (£36) and a Microsoft based stack (£58)
- Avoiding US-based hardware is significantly more challenging. While Lenovo (China) and Fairphone (Netherlands) provide alternatives, most components (CPUs, GPUs, networking chips) remain dependent on Intel, AMD, Nvidia, and Qualcomm.
- Zoho (India) was evaluated as a consolidated alternative, offering deep integration but with trade-offs in flexibility.

The research confirms that while a **US-free software ecosystem is possible, hardware supply chains remain dependent on US-designed components**. There is also likely to be a strong supply chain dependency on the three US based hyperscale providers; Google Cloud, Microsoft Azure and Amazon AWS. For European companies hosting on these platforms, it may be possible to move to a European equivalent (like France's OVH Cloud), but there would likely be considerable effort to remove the hyperscaler specific technology (like AWS' S3, or Azure's Fabric).

## Objective

The goal of this experiment was to construct a comprehensive workplace technology stack that **excludes all US-based software and hardware** while maintaining usability, scalability, and security for small and medium-sized businesses (SMBs).

This required evaluating laptops, phones, operating systems, communication tools, productivity software, security solutions, and infrastructure - all sourced from Europe, Latin America, Canada, EMEA or Asia Pacific.

This study aimed to evaluate whether a viable non-U.S. workplace technology stack could be assembled for SMBs. To assess its effectiveness, the selected stack was systematically compared to the [Seeto Stack](#) - a curated selection of workplace tools based on Microsoft and Google suites, provided by the UK-based Managed Service Provider, **Seeto**<sup>1</sup>. This comparison examined functional capabilities, cost differences, and key trade-offs between commonly used U.S.-based technology stacks and their non-U.S. counterparts.

## Buyer Beware

*This research represents a rapid market scan, intended to identify capable alternatives to US based software. It is neither a set of recommendations, nor representative of a full procurement process. You should consider this information for interest only and not make any purchasing decisions based on these findings.*

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<sup>1</sup> Note: one of the authors of this research paper is a director at Seeto

## Methodology

### Establishing Scope

This study focused on workplace technology rather than server or cloud infrastructure. The evaluation prioritized core areas including hardware, collaboration tools, security solutions, communication platforms, and business applications. To ensure relevance for small and medium-sized businesses (SMBs), enterprise-scale tools were deprioritized. Additionally, software solutions were preferred in a Software-as-a-Service (SaaS) model rather than downloadable or installable applications.

### Identifying Key Categories

To structure the evaluation, workplace technology was divided into three primary categories:

1. **Hardware** - including laptops, phones, and networking equipment.
2. **Software** - covering operating systems, office tools, security, collaboration platforms, customer relationship management (CRM), business intelligence (BI), and automation tools.
3. **Security and Infrastructure** - consisting of VPNs, mobile device management (MDM), and identity management solutions.

### Technology Selection & Elimination Process

Each category was populated with global technology solutions that met the non-US criteria. The evaluation process considered several factors, including headquarters location, suitability for smaller businesses, feature set, usability, market adoption, compliance with security/privacy regulations and ease of integration. Solutions that failed to meet these criteria were excluded.

A common challenge during this process was identifying companies that were originally founded outside the US but had since relocated their headquarters to the US (e.g., Pipedrive, Freshworks). Such tools were excluded from consideration.

### Consideration of Alternatives

From the original list of potential vendors, any that were investigated but not considered were tracked and recorded in the 'Considered but Rejected' list.

## **Finalizing the Stack**

After multiple iterations and a review of each shortlisted technology, a balanced and ultimately pragmatic selection of tools was chosen. Categories where no suitable non-US alternatives could be confidently identified were noted for further review.

## **Benchmarking Against Existing Solutions**

To contextualize the findings, the selected non-US technology stack was compared against the Seeto Stack, a curated selection of workplace technology tools primarily based on Microsoft and Google suites, provided by the UK-based Managed Service Provider, Seeto. This comparison assessed functionality, integration capabilities, and cost differences to determine whether the non-US alternatives could match or exceed the usability, scalability, and security standards of widely adopted solutions.

## Findings & Outcomes

While a non-U.S. software stack is achievable with strong alternatives, significant trade-offs exist, particularly in user experience, supply chain dependence, and integration complexity. These limitations highlight why U.S.-based technology continues to dominate in many areas.

The final non-US workplace tech stack consists of a combination of solutions from the UK, EMEA, APAC, and Canada, which have been chosen based on their suitability for modern SMB workforces. A selection of commercial and Open Source solutions were found to be the most appropriate in this review.

The high level findings include the following selections:

### Hardware & OS

Lenovo (China), Ubuntu (UK), Fairphone (Netherlands), /e/OS (France).

### Collaboration & Communication

ProtonMail & Drive (Switzerland), Threema Work (Switzerland), Atlassian (Australia).

### Office & Productivity

ONLYOFFICE (Latvia), Pitch (Germany)

### Security & Infrastructure

1Password (Canada), Scalefusion (India), Bitdefender (Romania).

### Business Applications

Xero (New Zealand), Mistral AI (France), Qwant (France), Count (UK)

We also discovered that by utilising the full suite of products from India-based Zoho, an alternative stack could easily consolidate multiple business functions into one unified ecosystem, reducing vendor complexity. This would provide an SMB-friendly tech stack with deep integration across tools.

## Supply Chain Complexity

While it is theoretically possible to construct a fully US-free business technology stack at the software level, hardware remains deeply intertwined with US-based supply chains. Key semiconductor manufacturers such as Intel, AMD, Nvidia, and Qualcomm dominate the market, making it difficult to source essential laptop and smartphone components without reliance on US technology.

Although alternative chip manufacturers (such as MediaTek, Samsung Exynos, and RISC-V) offer potential substitutes, they come with significant limitations in terms of performance, availability, and software compatibility. While the findings of this research successfully minimizes U.S. software dependence, achieving full independence at the hardware level would require a **fundamental restructuring of the global semiconductor industry**—a shift that remains improbable in the near future



## Complete List: Non-US Workplace Tech Stack

| Category                   | Selected Solution                       | Region      |
|----------------------------|---|-------------|
| Laptop                     | Lenovo ThinkPad P14s Gen 5              | China       |
| Laptop OS                  | Ubuntu Linux                            | UK          |
| Phone                      | Fairphone                               | Netherlands |
| Phone OS                   | /e/OS (Murena)                          | France      |
| Email                      | Proton Mail for Business                | Switzerland |
| Chat                       | Threema Work                            | Switzerland |
| File Storage               | Proton Drive (Switzerland)              | Switzerland |
| VPN                        | Proton VPN (Switzerland)                | Switzerland |
| Knowledge Management       | Confluence (Atlassian)                  | Australia   |
| Office Suite (basic use)   | ONLYOFFICE                              | Latvia      |
| Identity Management (IDP)  | 1Password                               | Canada      |
| Device Management (MDM)    | Scalefusion                             | India       |
| Endpoint Protection        | Bitdefender GravityZone                 | Romania     |
| Web Browser                | Vivaldi                                 | Norway      |
| Search Engine              | Qwant                                   | France      |
| Generative AI (Chatbot)    | Mistral Le Chat for Teams               | France      |
| Presentation Software      | Pitch                                   | Germany     |
| Business Intelligence (BI) | Count                                   | UK          |
| Accounting Software        | Xero                                    | New Zealand |
| CRM                        | Capsule                                 | London      |
| Software Dev & PM          | Atlassian (Jira, Confluence, Bitbucket) | Australia   |

## Conclusion

While we have demonstrated that it's possible to build a tech stack that has no obvious reliance on US based businesses, it would be hard to propose that it was preferable.

Two things became obvious in the course of this research; first that it is very difficult to replace US technology, especially when considering the full supply chain - semiconductors and hyperscale cloud providers are probably the most obvious examples. Second, it demonstrates just how widespread US-based technology is, and that Europe and the UK have few compelling alternatives for critical components of their workplace technology infrastructure.

The workplace technology stack that we have selected here does, at a broad level, cover the same capabilities as a tech stack made up of Microsoft 365, Google Workspace, Slack and others. However for the end user, and indeed the IT administrator, the experience would not match up. While several of the tools that we have selected are excellent, there is a massive benefit from user familiarity with the popular tools, the strength of the ecosystem and the tightness of the integration within tools themselves. Google Workspace has an excellent user experience that is hard to replicate. Microsoft 365 has incredibly close integration between tools, and extremely high adoption.

Perhaps strangely, one of the hardest tools to replace was also one of the simplest: Excel - with Google Sheets off the table, the only real alternative was Libre Office, which doesn't have a comparable online mode (Only Office was selected, but the user experience may lack and finance professionals will fight to the end to keep their Excel licence).

With that said, Zoho deserves special mention, offering a wide range of high quality tools which would capably replace many US alternatives. It wasn't in the spirit of the research to simply adopt Zoho as a single solution, and so we have offered an alternative 'Zoho stack', but gone on to offer a complete stack made of component non-US parts.

This research also evidences just how significant the opportunity is for more competition in these areas, and specifically for competition that comes from Europe and the UK. Whether it's commercial software, or stewardship of open source projects (as Canonical have done), there is a compelling reason for entrepreneurs and investors in the UK and Europe to build a more competitive, and stronger market.

For small and medium businesses, this research underscores the reality that while a non-U.S. technology stack is possible, it involves compromises in integration, user experience, and long-term viability. Organizations evaluating vendor independence should weigh the trade-offs carefully, balancing sovereignty concerns with operational efficiency and supportability.

## Addenda

### Alternative Zoho stack

The Zoho stack deserves a special mention and was found to offer a wide range of high quality tools, from Identity Management, to Office style tools (which would solve the Excel question), to CRM and HR systems, video calling and collaboration tools and even finance, e-signing and analytics capabilities.

### Key Benefits of a Zoho-Based Stack

- Seamless integration across tools, fewer vendors to manage.
- Zoho offers competitive pricing compared to multiple standalone solutions.
- Designed for small and medium businesses, offers scalability

### Trade-Offs

- Less Flexibility : Tied into Zoho's ecosystem, making it harder to swap individual tools.

| Category                          | Zoho-Based Alternative                                       |
|-----------------------------------|--|
| Email                             | Zoho Mail  |
| Chat                              | Zoho Cliq  |
| File Storage                      | Zoho WorkDrive   |
| Knowledge Management              | Zoho Wiki  |
| Office Suite (Docs/Sheets)        | Zoho Writer, Zoho Sheet                                      |
| Identity Management (IDP)         | Zoho Directory   |
| Device Management (MDM)           | ManageEngine Mobile Device Manager Plus<br>(Zoho Subsidiary) |
| Generative AI (Chatbot)           | Zoho Zia (AI Assistant)                                      |
| Presentation Software             | Zoho Show  |
| Spreadsheets (Finance/Accounting) | Zoho Sheet   |
| Business Intelligence (BI)        | Zoho Analytics   |
| CRM                               | Zoho CRM   |

## Considered but Rejected: Solutions that didn't make the cut

Many products didn't make the list - often with regret. Companies like Framework provide excellent products, but have a US HQ. Others were often nominally non-US based, but on inspection had moved headquarters to have a US base, or had primarily US ownership structures (including public listings). This calls the support of Europe's investor ecosystem further into question - indeed, this is why we can't have nice things.

There were some genuinely excellent tools that didn't make the cut. The open source Gimp, Inkscape and Libre Office are strong contenders to replace Photoshop, Illustrator and Microsoft Office respectively. However, the rules of this research meant that we were looking for software solutions that were provided online (e.g. Software-as-a-Service), and so we reluctantly discounted them.

**On Zoho:** It didn't feel in the spirit of the research to simply adopt Zoho as a single solution, and the Zoho corporation (while a privately owned company with a strong Indian heritage), was originally founded as AdventNet in New Jersey and has a US HQ in Austin, Texas (with their global HQ in Chennai India). It's complicated, but Zoho would make a very worthy contender to replace large parts of the US based tech stack, and so we have included an example Zoho stack.

There will also be tools that you would recommend and feel that we've missed. That's great - this was a very quick market scan and could never be entirely thorough, but we did aim to review the best known alternatives in each category. Please do share your suggestions widely, as more competition, and support for smaller businesses creates a healthy ecosystem.

With the exception of the obvious Microsoft/Google/Apple incumbents, the following list shows some of the companies which didn't make the final selection.

| Category  | Company / Tool                         | Reason for Rejection                                      |
|-----------|--|---|
| Laptop    | Framework                              | US HQ   |
| Laptop OS | Other Linux distros                    | Considered, but Ubuntu has the strongest end user support |
|           |  |   |
| Phone OS  | GrapheneOS                             | /e/OS was best fit.                                       |
|           | Ubuntu Touch                           | No longer up to date                                      |
|           | Sailfish                               | Not as well supported as /e/OS                            |
| Email     | Tutanota (Germany)<br>Neo (Cayman Is.) | Proton offered a better suite of tools                    |

| Category             | Company / Tool          | Reason for Rejection   |
|----------------------|-------------------------|--|
| Chat                 | Mattermost              | US-based   |
|                      | Element (UK)            | 50 user minimum, but otherwise a compelling option             |
|                      | Rocket.Chat             | US HQ despite international team                               |
| Knowledge Management | Nuclino                 | Originally selected, replaced with Atlassian Confluence        |
|                      | Slite                   | US investors, unclear HQ                                       |
|                      | Fibery                  | Similar to Nuclino, marginally more expensive                  |
|                      | Coda, Notion            | US based   |
| Office Suite         | Collabora Office        | No clear pricing, dated website                                |
|                      | CryptPad Sheets         | Too limited for finance-heavy work                             |
| Spreadsheets         | Zoho Sheet              | Not included in primary stack (reserved for alternative stack) |
| BI / Reporting       | Qlik                    | Too expensive, US HQ   |
|                      | Yellowfin               | No clear pricing, enterprise-focused                           |
|                      | Helical Insight         | Outdated UI, unappealing design                                |
|                      | Metabase                | US-based   |
|                      | DashThis                | SEO-focused, not BI  |
|                      | Toucan Toco             | More for embedded analytics                                    |
|                      | Jedox                   | Too enterprise-focused   |
|                      | RapidMiner              | Too old-fashioned  |
|                      | KNIME                   | More suited for data science than BI                           |
| CRM                  | Freshsales (Freshworks) | US HQ  |
|                      | Salesforce              | US HQ  |
|                      | Microsoft Dynamics      | US HQ  |
|                      | HubSpot                 | US HQ  |
|                      | Pipedrive               | HQ moved from Estonia to US                                    |
|                      | SuperOffice CRM         | Not widely adopted   |

| Category                  | Company / Tool                        | Reason for Rejection  |
|---------------------------|---------------------------------------|---|
| Telephony / VoIP          | Voyced                                | Considered but not added to main stack  |
|                           | UniTalk                               | Considered but not added to main stack  |
| Search Engine             | Startpage                             | Owned by US-based System1   |
| Presentation Software     | Prezi                                 | US HQ despite European origins  |
|                           | Canva                                 | US based  |
| Identity Management (IDP) | Gluu                                  | More developer-focused than SME-friendly  |
|                           | ZITADEL                               | More like Auth0 than a full IDP   |
|                           | Univention UCS                        | Too enterprise-focused  |
| Device Management (MDM)   | ManageEngine (Zoho)                   | Kept in alternate stack but not in primary  |
| Search Engine             | Startpage (default search in Vivaldi) | Replaced with Qwant due to US ownership   |
| VPN                       | NordVPN                               | Proton VPN was included with the subscription. Nord would be a solid choice if more features or ZTNA is required. |
| Endpoint Protection       | Sophos Intercept X                    | Designed for servers, not desktops  |
|                           | ESET                                  | Designed for servers, not desktops  |

## Supply Chain Challenges in Depth

While selecting **non-US software and hardware vendors** for a complete business tech stack, the **global nature of supply chains** presents significant challenges. Even when companies are headquartered outside the US, **key components are often sourced from US-based firms**, making a fully "US-free" tech stack nearly impossible.

### 1. Semiconductor & Chip Dependency

Almost all modern **laptops, desktops, and smartphones** rely on **semiconductors designed by US companies** such as:

- **Intel (US)** - Dominates laptop and server CPU markets.
- **AMD (US)** - A primary competitor to Intel, supplying CPUs and GPUs.
- **Nvidia (US)** - The leading provider of GPUs, particularly in AI and high-performance computing.
- **Qualcomm (US)** - Major supplier of mobile processors and 5G modems.
- **Broadcom (US)** - Supplies networking and wireless communication chips.

Even if a laptop is **manufactured by a Chinese or European company**, it is likely to include **Intel or AMD processors, Nvidia GPUs, or Qualcomm networking chips**.

### 2. Smartphone Hardware Supply Chain

While **Fairphone (Netherlands)** and **other non-US phone manufacturers** exist, their **chipsets, sensors, and modems** often come from US suppliers like Qualcomm. Alternative chip manufacturers such as **MediaTek (Taiwan)** and **Samsung Exynos (South Korea)** provide some independence, but they still integrate **ARM architectures (UK)** and **other third-party components**.

### 3. Cloud & Data Infrastructure

Even if the primary software stack is non-US, many cloud infrastructure and **data centers** use **US-designed server processors (Intel/AMD)** and networking components. Fully avoiding US technology **would require moving to specialized hardware**, such as RISC-V processors (open-source) or domestic semiconductor programs, which are still **in early stages** outside the US. The leading hyperscale cloud providers themselves - Amazon AWS, Google Cloud and Microsoft Azure - are likely used in the supply chain of global businesses, and there would likely be considerable effort required to migrate to sovereign clouds without the same native functionality.

### 4. Software & Firmware Dependencies

Even if a device's hardware is **non-US**, its **firmware, drivers, and low-level software** often originate from:

- **US-based chipset vendors** (Intel, AMD, Nvidia, Qualcomm).

- **US-developed software libraries** (many open-source projects are led by US organizations).
- **Firmware provided by US or globally distributed teams.**

## **5. Global Manufacturing Constraints**

- **Laptops and phones are mostly manufactured in China, Taiwan, and South Korea,** regardless of the brand.
- **Even European or APAC brands still rely on US-designed components** due to the **monopoly of certain high-performance chip sectors.**



## Stack Cost comparison

### Non-US cost breakdown

| Capability   | Vendor      | Product                  | Price (one off) | Price (PUPM)   |
|--|-------------|--------------------------|-----------------|----------------|
| Laptop   | Lenovo      | ThinkPad P14s Gen 5      | £ 799.00        | £ 33.29        |
| Laptop Os  | Canonical   | Ubuntu (w/ Pro)          |                 | £ 1.64         |
| Phone  | Fairphone   | 5                        | £ 599.00        | £ 24.96        |
| Phone OS   | Murena      | e/OS                     |                 | £ -            |
| Email  | Proton      | Business Suite           |                 | £ 10.76        |
| Chat   | Threema     | Threema Work             |                 | £ 2.65         |
| File Storage                                       | Proton      | incl with Business Suite |                 | £ -            |
| Office equivalent                                  | OnlyOffice  | DocSpace <sup>2</sup>    |                 | £ 0.83         |
| Identity Management                                | 1Password   | Business                 |                 | £ 5.78         |
| Gen AI / Chat                                      | Mistral     | Le Chat Team             |                 | £ 15.77        |
| Laptop Management                                  | Canonical   | Pro/Landscape            |                 | £ -            |
| VPN  | Proton      | incl with Business Suite |                 | £ -            |
| MDM (Phones)                                       | Scalefusion | UEM                      |                 | £ 3.94         |
| Endpoint protection                                | Bitdefender | Gravity Zone             |                 | £ 3.20         |
| Collaboration                                      | Atlassian   | Confluence               |                 | £ 4.10         |
| <b>Total per user per month (without hardware)</b> |             |                          |                 | <b>£ 47.03</b> |

### Indicative US based stack costs<sup>3</sup>

| Google based                                   |         | Microsoft based                                    |         |
|--|---------|--|---------|
| Okta   | £ 8.70  | Okta   | £ 8.70  |
| Google Workspace Business Std                  | £ 11.80 | M365 Business Premium                              | £ 18.10 |
| Gemini Business                                | £0      | Microsoft Copilot                                  | £ 24.26 |
| Microsoft Intune Plan 1                        | £ 6.20  | Slack Pro  | £ 7.00  |
| Microsoft Defender for Business                | £ 2.30  |  |         |
| Slack Pro                                      | £ 7.00  |  |         |
| <b>Google total per user per month: £36.00</b> |         | <b>Microsoft total per user per month: £ 58.06</b> |         |

<sup>2</sup> Has an unusual 'price per administrator' - this is for 3 admins, assuming 20 users.

<sup>3</sup> Based on the 'Seeto Stack'

## Stack Ownership in detail

**1. Lenovo (ThinkPad P14s Gen 5)** - Lenovo Group Limited is incorporated in Hong Kong and is headquartered in Beijing, China ([Lenovo - Wikipedia](#)). Its largest shareholder is Legend Holdings, a Chinese conglomerate (around 31% ownership) ([Who Owns Lenovo ? | Business Strategy Hub](#)), so the company's majority ownership is firmly outside the US. Lenovo's main executive headquarters are in China (with an operational hub in North Carolina), ensuring its primary base remains outside the US ([Lenovo - Wikipedia](#)).

**2. Ubuntu Linux (Canonical)** - Ubuntu is developed by Canonical Ltd., a privately held UK-based company founded by Mark Shuttleworth ([Canonical \(company\) - Wikipedia](#)). Canonical is incorporated in the United Kingdom and headquartered in London ([Canonical \(company\) - Wikipedia](#)). It has no US parent company and is majority-owned outside the US (primarily by its founder, who is South African). The company's main offices are in the UK, not in the United States ([Canonical \(company\) - Wikipedia](#)).

**3. Fairphone** - ([File:FairPhone \(12946480134\).jpg - Wikimedia Commons](#)) A Fairphone smartphone (the company's first "First Edition" model). Fairphone B.V. is a Dutch electronics manufacturer based in Amsterdam, Netherlands ([Fairphone - Wikipedia](#)). It is an independent social enterprise (not owned by any US parent) and its ownership and operations are entirely European. The majority ownership is outside the US, and its headquarters is in the Netherlands (no primary presence in the US) ([Fairphone - Wikipedia](#)).

**4. /e/OS (Murena)** - Murena is a French company (founded by Gaël Duval) that develops the /e/OS mobile operating system ([November - 2024 - OSnews](#)). It is incorporated in France and based in Paris ([Sustainable Smartphone Arrives in United States: Murena Fairphone Comes to America - Sustainable Tech Partner for Green IT Service Providers](#)). There is no US parent company - Murena is privately held in France - so its ownership is entirely non-US. The company's main headquarters is in France, with only user bases or partners abroad (any US offices would be secondary) ([Sustainable Smartphone Arrives in United States: Murena Fairphone Comes to America - Sustainable Tech Partner for Green IT Service Providers](#)).

**5. Proton Mail** - ProtonMail is operated by **Proton AG**, a Swiss company headquartered in Geneva, Switzerland ([Proton AG - Wikipedia](#)). Proton AG is majority-owned by the Swiss non-profit Proton Foundation ([Proton AG - Wikipedia](#)), meaning control lies outside the US. The service (and related Proton services) are incorporated and based in Switzerland, so the primary jurisdiction and headquarters are in Switzerland (though Proton has users globally) ([Proton Mail - Wikipedia](#)).

**6. Threema Work** - Threema Work is provided by Threema GmbH, a Swiss company. Threema GmbH is a privately held firm based in Switzerland ([Threema - Wikipedia](#)). There is no US parent (Threema's investors are Swiss/German), ensuring majority ownership remains outside the US. The company's servers and development are located in Switzerland ([Threema - Wikipedia](#)), and its headquarters is in Pfäffikon, Switzerland - not in the United States.

**7. Proton Drive** - Proton Drive is another service of **Proton AG** of Switzerland. Like Proton Mail, it is owned by Proton AG (majority-owned by the Swiss Proton Foundation) ([Proton Mail - Wikipedia](#)). The company is Swiss-incorporated and based, so ownership and control are outside the US. Its headquarters is in Switzerland (Geneva), not in the US ([Proton AG - Wikipedia](#)). (In fact, all Proton services - Mail, Drive, VPN, etc. - share this Swiss ownership and headquarters.) ([Proton Mail - Wikipedia](#))

**8. Proton VPN** - Proton VPN is operated by Switzerland-based Proton AG as well ([Proton Mail - Wikipedia](#)). The situation is the same as Proton Mail/Drive: the company is Swiss, majority-owned by a Swiss non-profit foundation ([Proton AG - Wikipedia](#)). Thus, Proton VPN is majority non-US-owned and headquartered in Switzerland ([Proton AG - Wikipedia](#)). Any US offices are regional, while the main corporate headquarters remains in Geneva, Switzerland ([Proton Mail - Wikipedia](#)).

**9. Confluence (Atlassian)** - Confluence is a product of Atlassian Corporation, which is originally an **Australian** software company. Atlassian is globally headquartered in Sydney, Australia (though it's domiciled as a UK plc and has a US headquarters for operations) ([Atlassian - Wikipedia](#)). The company's founders (Australians Mike Cannon-Brookes and Scott Farquhar) together have owned roughly 60% of Atlassian's shares ([Atlassian - Wikipedia](#)), ensuring majority ownership outside the US. In short, Atlassian's corporate ownership and primary headquarters are non-US (Australian), with only a regional office in the US ([Atlassian - Wikipedia](#)).

**10. ONLYOFFICE** - ONLYOFFICE is developed by Ascensio System SIA, which is a **Latvian** software company. The company's headquarters is in Riga, Latvia ([About ONLYOFFICE | ONLYOFFICE](#)). It has no US parent company; Ascensio (ONLYOFFICE's creator) is privately held in Latvia, so ownership is outside the US. The main office is in Latvia, and while ONLYOFFICE has opened branches in other regions, its primary base of operations is not in the United States ([About ONLYOFFICE | ONLYOFFICE](#)).

**11. 1Password** - 1Password is made by **AgileBits Inc.**, a Canadian company. AgileBits is headquartered in Toronto, Canada ([Privacy Policy | 1Password](#)). The company is privately held (venture-backed) in Canada, not owned by any US corporation, so the majority ownership remains outside the US. 1Password's main offices are in Canada; while it serves customers globally (including via a US office), its principal headquarters is not in the United States ([Privacy Policy | 1Password](#)).

**12. Scalefusion** - Scalefusion is part of the ProMobi Technologies family, an **Indian** software company. It is incorporated in India and headquartered in Pune, India ([About Scalefusion](#)). ProMobi Technologies (Scalefusion's parent firm) is privately held in India, which means Scalefusion's ownership is entirely non-US. The primary headquarters is in India, with no main US headquarters (only customer support or sales representation, if any, in the US) ([About Scalefusion](#)).

**13. Bitdefender GravityZone** - Bitdefender is a Romanian cybersecurity company. It is dual-headquartered in Bucharest, Romania (and has a secondary HQ in Santa Clara, California) ([Bitdefender - Wikipedia](#)). The founder, Florin Talpeș, is the current CEO and main shareholder

of Bitdefender ([Bitdefender - Wikipedia](#)) - indicating control is in Romanian hands. Bitdefender is not US-owned (a UK fund owns a minority stake, and the rest is primarily the Romanian founder), so majority ownership lies outside the US. The main corporate base is Romania, even though a US office exists for North American operations ([Bitdefender - Wikipedia](#)).

**14. Vivaldi** - Vivaldi (the web browser) is developed by **Vivaldi Technologies AS**, a Norwegian company. It is headquartered in Oslo, Norway ([Vivaldi Technologies - Wikipedia](#)). Vivaldi is privately owned by its founders (including Norwegian co-founder/CEO Jon von Tetzchner) and employees, with no US parent company. This means the company is majority-owned outside the US. The primary headquarters is in Norway, and while Vivaldi has small offices or workspaces in the US and elsewhere, its main HQ is not in the United States ([Vivaldi Technologies - Wikipedia](#)).

**15. Qwant** - Qwant is a French search engine company. It is incorporated in France and headquartered in Paris ([Category:Qwant - Wikimedia Commons](#)). Qwant's ownership is European: for example, it is co-owned by **Axel Springer SE** (Germany) and the **Caisse des Dépôts** (French state investment fund) ([Category:Qwant - Wikimedia Commons](#)). There is no US majority owner, confirming that control is outside the US. The company's main headquarters is in France (Paris), with only regional market offices elsewhere as needed ([Category:Qwant - Wikimedia Commons](#)).

**16. Mistral AI (Le Chat for Teams)** - Mistral AI is a French artificial intelligence startup (creators of the "Le Chat" AI assistant). **Mistral AI SAS** is headquartered in Paris, France ([Mistral AI - Wikipedia](#)). It has no parent company - it's a standalone startup - and its funding is predominantly European (over 75% European-owned, according to interviews). Therefore, the majority ownership is outside the US. The main office is in Paris, France, not in the United States ([Mistral AI - Wikipedia](#)).

**17. Asus (ZenWiFi AX, Pro ET12)** - ASUS (ASUSTeK Computer Inc.) is a **Taiwanese** multinational electronics company. It is headquartered in the Beitou District of Taipei, Taiwan ([Asus - Wikipedia](#)). The company is publicly traded in Taiwan and not owned by any US entity (its founders and major shareholders are Taiwanese). This means the majority ownership is non-US. ASUS's principal headquarters is in Taiwan; while it has a broad global presence (including US branch offices for sales), its main corporate base remains outside the US ([Asus - Wikipedia](#)).

**18. Pitch** - Pitch is a presentation software company founded in Germany. The company (Pitch Software GmbH) is based in Berlin, Germany - "proudly made in Germany," as the team notes ([About us | Pitch](#)). It is privately held (venture-backed) with German founders, and no US parent company. Thus, ownership is primarily European (outside the US). Pitch operates as a remote-first global team, but its roots and headquarters are in Germany, not in the US ([About us | Pitch](#)).

**19. Xero** - Xero Limited is a New Zealand-based technology company offering cloud accounting software ([Xero \(company\) - Wikipedia](#)). It is incorporated and domiciled in New Zealand (listed on the Australian exchange). Xero's headquarters is in Wellington, New Zealand ([Xero \(company\) - Wikipedia](#)). There is no US parent - Xero is an independent public company

originally founded by New Zealanders. The majority ownership is outside the US (its shareholders are mainly in New Zealand/Australia). The company's main headquarters remains in New Zealand (though it has offices in the US and other countries for regional operations) ([Xero \(company\) - Wikipedia](#)).

**20. Capsule** - Capsule is a CRM software service from **Zestia** - a privately held UK company. It was founded and is based in Manchester, United Kingdom ([Capsule \(CRM\) - Wikipedia](#)). Capsule (Zestia) has no US parent company; its ownership is in the UK (recent investment was from a UK fund, maintaining UK control). This confirms majority ownership outside the US. The headquarters is in Manchester, UK, and while Capsule serves customers worldwide (including the US), its primary office and incorporation are British ([Capsule \(CRM\) - Wikipedia](#)).

**21. Atlassian (Jira, Confluence, Bitbucket)** - Atlassian is an Australian-born software company. It reorganized under a UK holding entity for its IPO, but its global headquarters is still in **Sydney, Australia** ([Atlassian - Wikipedia](#)). The company's two Australian co-founders retain significant ownership (each around 30%) ([Atlassian - Wikipedia](#)), meaning control remains largely outside US hands. Atlassian is publicly traded in the US, yet the majority ownership and leadership are non-US (Australian). Its main headquarters and base of operations are in Australia (with a secondary US office in San Francisco), satisfying the requirement that its primary HQ is not in the US ([Atlassian - Wikipedia](#)).