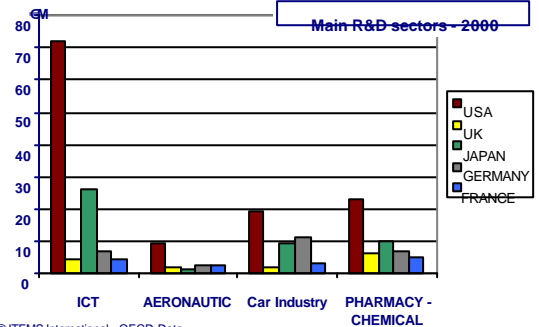




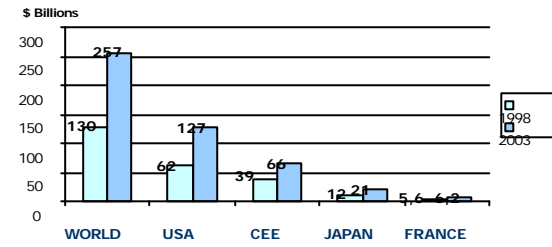
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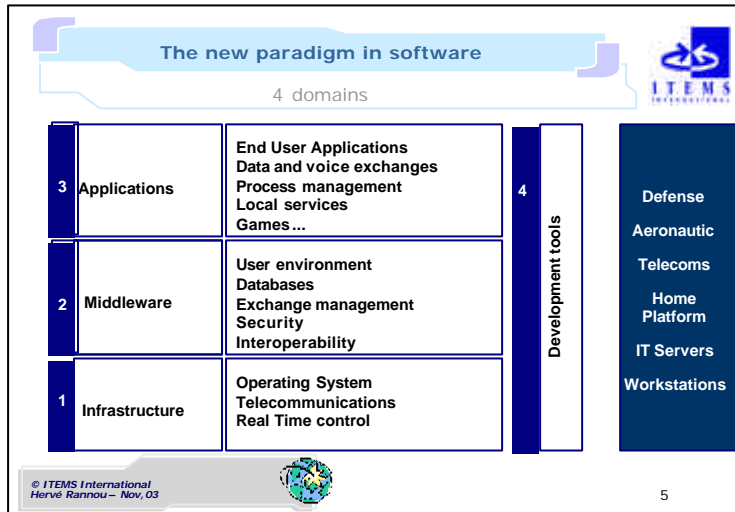
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- Major sector
- 3 Categories of players
 - ICT specialized players
 - Others industries where software is in the core of the value added :
 - Telecoms
 - Defense
 - Aeronautics ...
 - Users where ICT is in the strategic core of processes



■ Software is a growing market





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Time with new models

- Before 2000 :
 - Software industry
 - Applications industry

As in Europe, many countries considered the game as over :
Investment had to be focused on Telematics applications

- Now :
 - Open Source issue change the rules
 - All the software models have to be reconsidered

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Strategic issues

Players	Independence	Security
	Interoperability	Maintenance
	Performance	

Politics	Economic development
	Promoting national & regional industries
	Independence
	Geo-strategic issues
Competitiveness	
Jobs	

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Open-Source

- Adopted like Internet by research community
- Adopted in Internet networks for
 - Nodes
 - Servers
 - Tools
- More services on application servers

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Involvement of players

- IT industry and services
 - ▶ IBM
 - ▶ Sun
 - ▶ Hewlett Packard
 - ▶ Bull
 - ▶ Japan's Big Four Linux consortium : Fujitsu, Hitachi, IBM and NEC
- Software players :
 - ▶ Oracle
 - ▶ SAP ...

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Initiatives

- Germany
 - ▶ Federal initiative (Ministry of Economy)
 - ▶ Bundestag
 - ▶ City of Munich
- UK
 - ▶ Government initiative
 - ▶ OGC (Office of Government Commerce)
 - ▶ Defense initiative for OpenSource (ex : RAF)
- Spain
 - ▶ Estremadura
- Italy
 - ▶ Government study
 - ▶ Firenze

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Initiatives

- Taiwan
 - ▶ National program
- Chine
 - ▶ Governmental initiative
- Japon
 - ▶ eJapan based on OpenSource
- Mexico
 - ▶ Government Agency recommandation
- Israël
 - ▶ Decision in defense sector
- USA
 - ▶ Defense : MITRE report

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Initiatives

- Taiwan
 - ▶ National program
- D.R. of China
 - ▶ Governmental initiative
- Japon
 - ▶ eJapan based on OpenSource
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US Department of Defense : The MITRE report

MITRE therefore recommends 3 policy-level actions for DOD:

- Create a "Generally Recognized As Safe" FOSS (Free Open Source Software) list : Provide quick official recognition of FOSS applications
- Develop generic policies both to promote broader and more effective use of FOSS, and to encourage the use of commercial products that work well with FOSS.
- Encourage use of FOSS to promote product diversity. FOSS applications tend to be much lower in cost than their proprietary equivalents, yet they often provide high levels of functionality with good user acceptance.

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France

- Carcenac Report en 2001
 - OSS in e-Administration
- « Commissariat Général du Plan" - 2002
 - National security issue
- Defense : Integration of OSS in DGA programmes

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Many models to explore

Dedicated applications and services	Dedicated applications and services	Dedicated applications and services	Dedicated applications and services
Proprietary Middleware	Proprietary Middleware	Open Source Middleware	Open Source Middleware
Proprietary Operating System	Open Source Operating System	Open Source Operating System	Open Source Operating System

Defense, Aeronautic, Enterprises applications, Workstations , Embedded systems (telephone, PDA ...), Home platform...

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Policy for institutions

R&D in Software	National policy Local development	e-Administration
Innovation Cooperation Research-Industry Spin-offs processes		Intranet eAdministration to Citizens Intermediation Inter-administrations

- Technology neutral approach
- Proprietary approach including strategic deals
- Open source approach

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Op-Source : Strategic Observatory

- Launched by ITEMS
 - Strategic report to French Ministry of Industry
 - Cooperation with an Economic Institute
- Objectives :
 - To check all strategic decisions in the world about software
 - To analyze these decisions
 - To assess the consequences
- Phases
 - 1 : Launched in France
 - 2 : International network



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Conclusion

- Market is growing
- Key issues
 - Independence
 - Security
 - Maintenance
 - Cost
- Economic development
- Diversity in models
 - Coo-petition necessary between models
 - New opportunities

