

OSS Market Trend and Activities of Japan OSS Forum

October 31, 2008

Japan OSS Promotion Forum
Chairman, Kaoru Yano
(NEC, President)



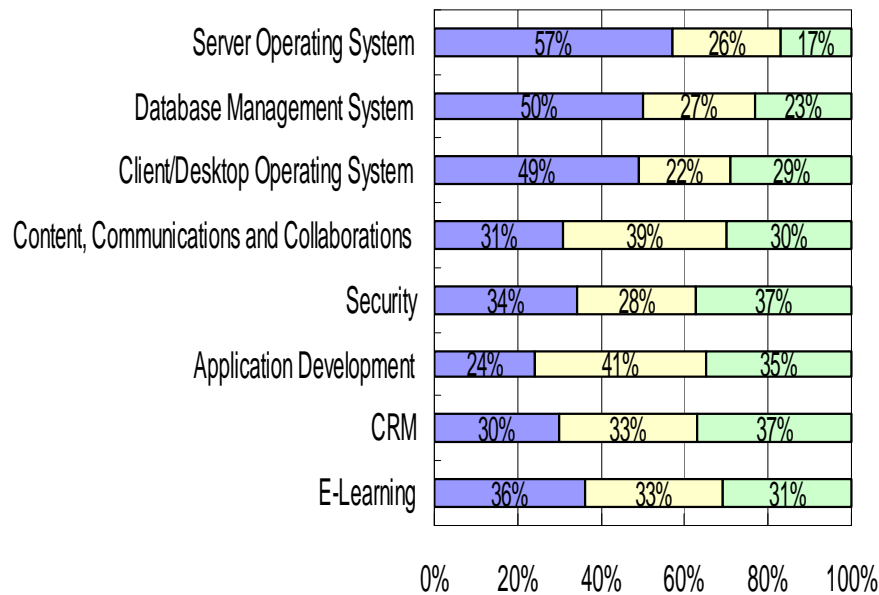
OSS Market Trend



OSS Proliferation in the World

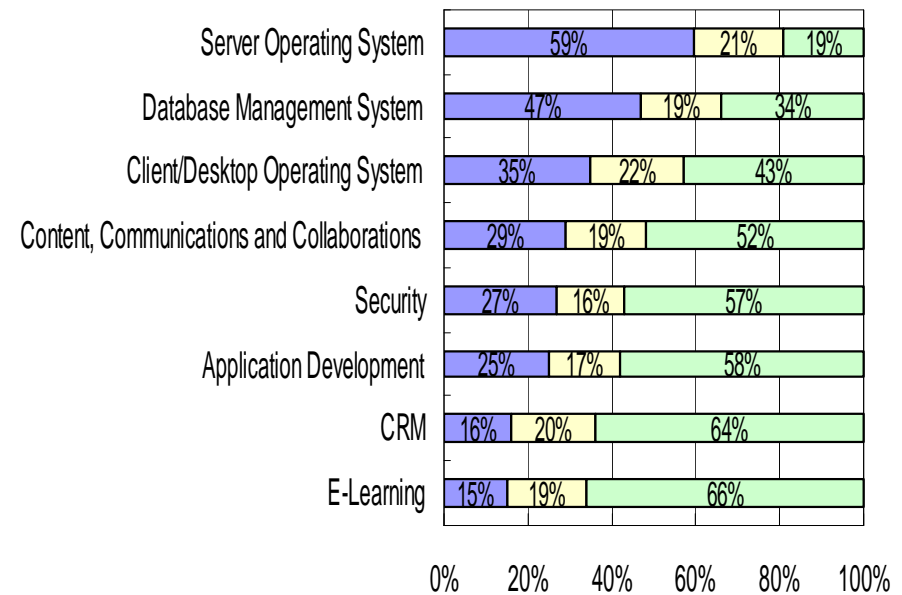
- ◆ **69%** of developers in the world say they use open-source modules in their applications.¹⁾
- ◆ By 2012, more than **90%** of enterprises will use open-source entirely or partially.²⁾

OSS Use in NA and Europe (Jan. 2007)



■ Currently Using ■ Plan to Use in 12 Months ■ Not Using/No/Don't Know

OSS Use in APAC (Jul. 2006)
(*China, Australia, Singapore)



■ Currently Using ■ Plan to Use in 12 Months ■ Not Using/No/Don't Know

1) Evans Data, 2) Garner

Source: User Survey Analysis Open-Source Software, North America and Europe, 1H07,

User Survey Analysis Open-Source Software Services, Asia/Pacific, 2006 (Gartner)

Broad Use Cases of OSS

- ◆ Has diverse use cases.
- ◆ Penetrating in innovative areas such as Web2.0, cloud, and virtualization.

Mobile /
Information appliance

 ANDROID

 LiMo Foundation

 CE Linux Forum

Web2.0

 Socialtext

 Drupal

 OpenPNE

 Nutch

 Lucene

 MOVABLE TYPE Publishing Platform

 Fastladder

Cloud
(SaaS, PaaS)

 Hadoop

※ users

 Google

 YAHOO!

 amazon.com

Desktop

 ubuntu

 fedora

 OpenOffice.org

 Google Chrome BETA

Servers

 THE LINUX FOUNDATION

 APACHE
AN APACHE SOFTWARE FOUNDATION PROJECT

 MySQL

 PostgreSQL

 php

Virtualization

 VirtualBox

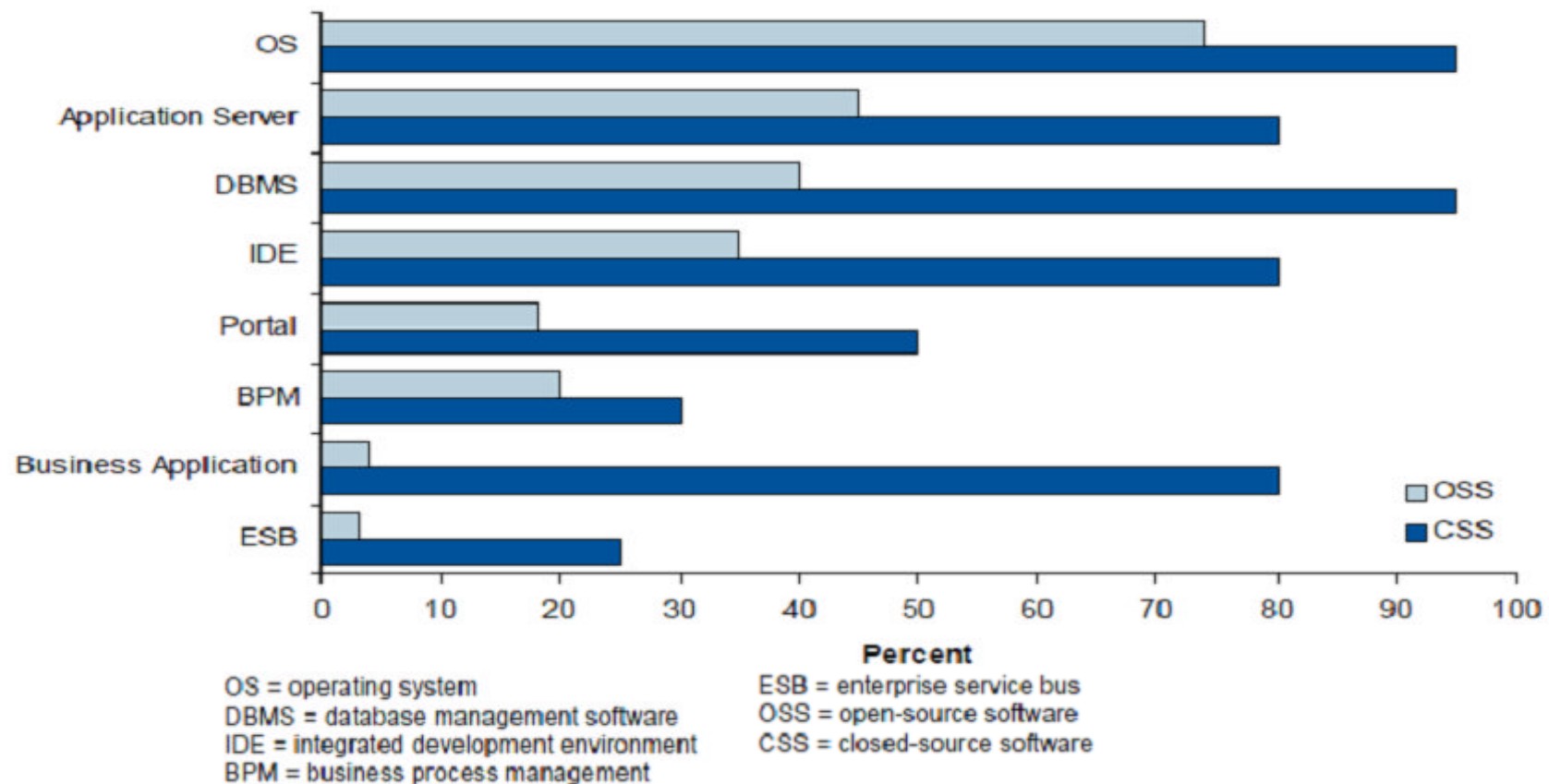
 QUMRANET™
(KVM)

 Xen

OSS Acceptance in Japan

- ◆ By 2011, at least 50% of large enterprises in Japan will use OSS in multiple technology categories of their new enterprise systems. (Source: Gartner)

OSS adaptation by large (2000+ employees) Japanese enterprises (studied March 2008)



Source: Open Source in Japan, 2008 (Gartner)

Japanese-led community activities expanding worldwide

- ◆ Ruby has several hundred thousand overseas users and over two thousand software development projects.
- ◆ Mr. Tatsuhiko Miyagawa is the first Japanese who won White Camel Award for his PERL community activity.

The White Camel Award:

Award for distinguished volunteer in PERL community. Started at the 1999 PERL conference.



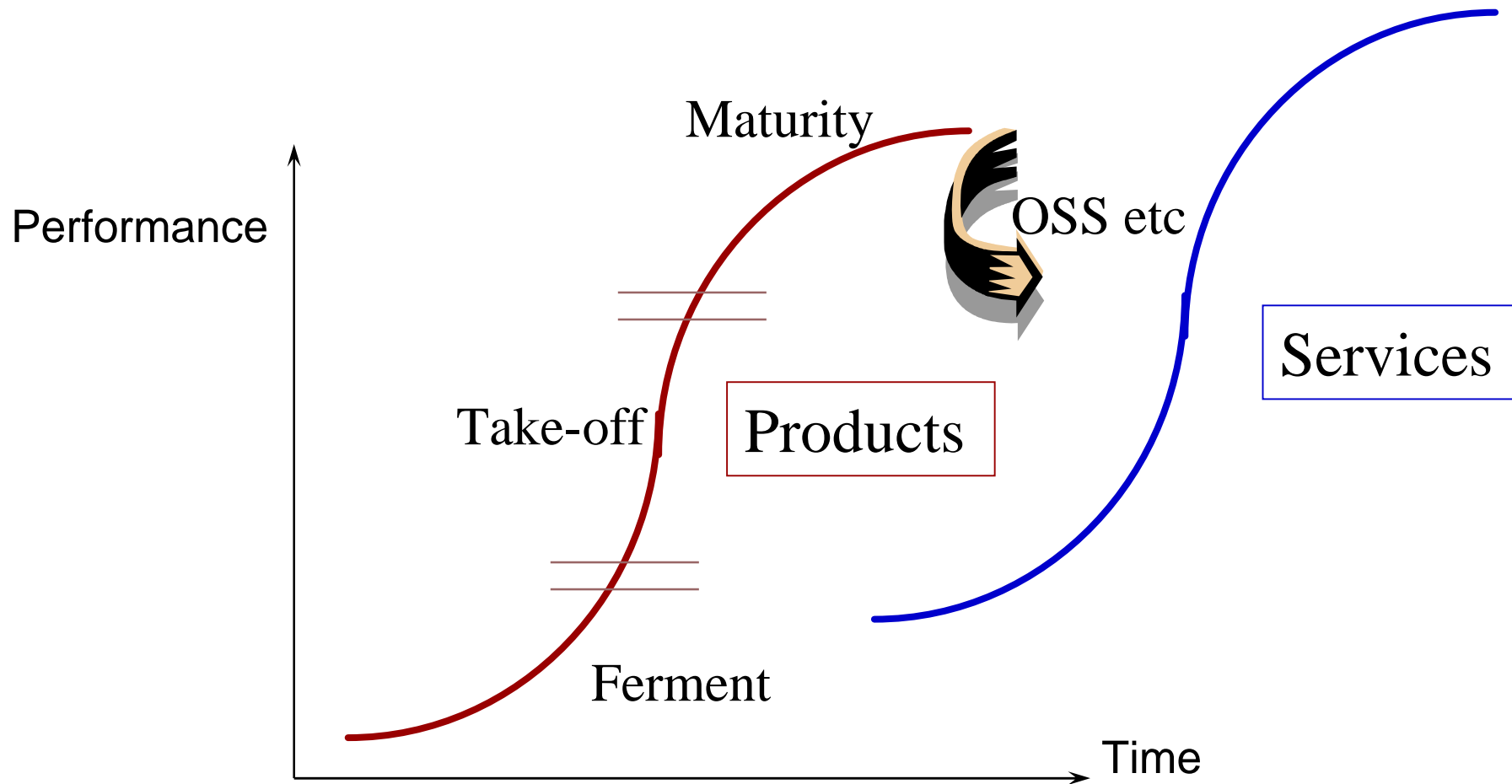
Mr. Yukihiro Matsumoto, Ruby creator



Mr. Tatsuhiko Miyagawa, at the award ceremony (right)

OSS: A Driver of Innovation

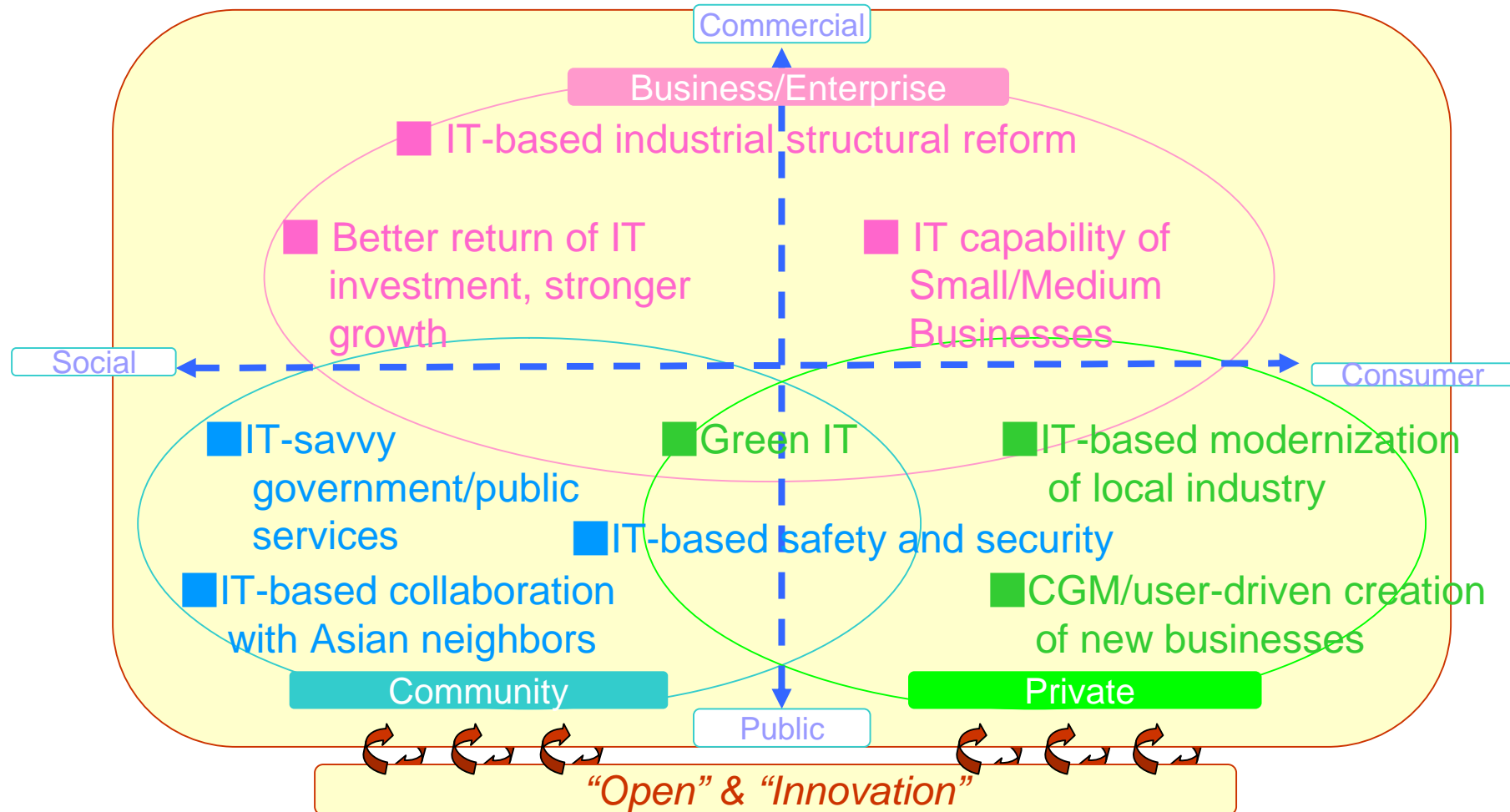
◆ “Innovation” brings disruption; Software Products to Services



Source: OECD-METI-RIETI CONFERENCE Prof. Michael A.Cusumano Key Note Speech (2008/10/6) <partially revised>

What is Open Innovation in Japan?

- ◆ For economic growth, competitive edge, safety and security of society, “Open & Innovative” are must.



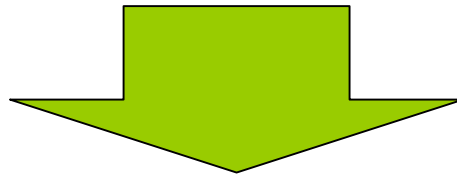
IPA's activities on Open Innovation

- ◆ IPA OSS Center extended its mission as “Open Software Center” in April, 2008.

Open Source Software Center

- Promotion of OSS

Open source: Sharing knowledge and wisdom for creation of better software



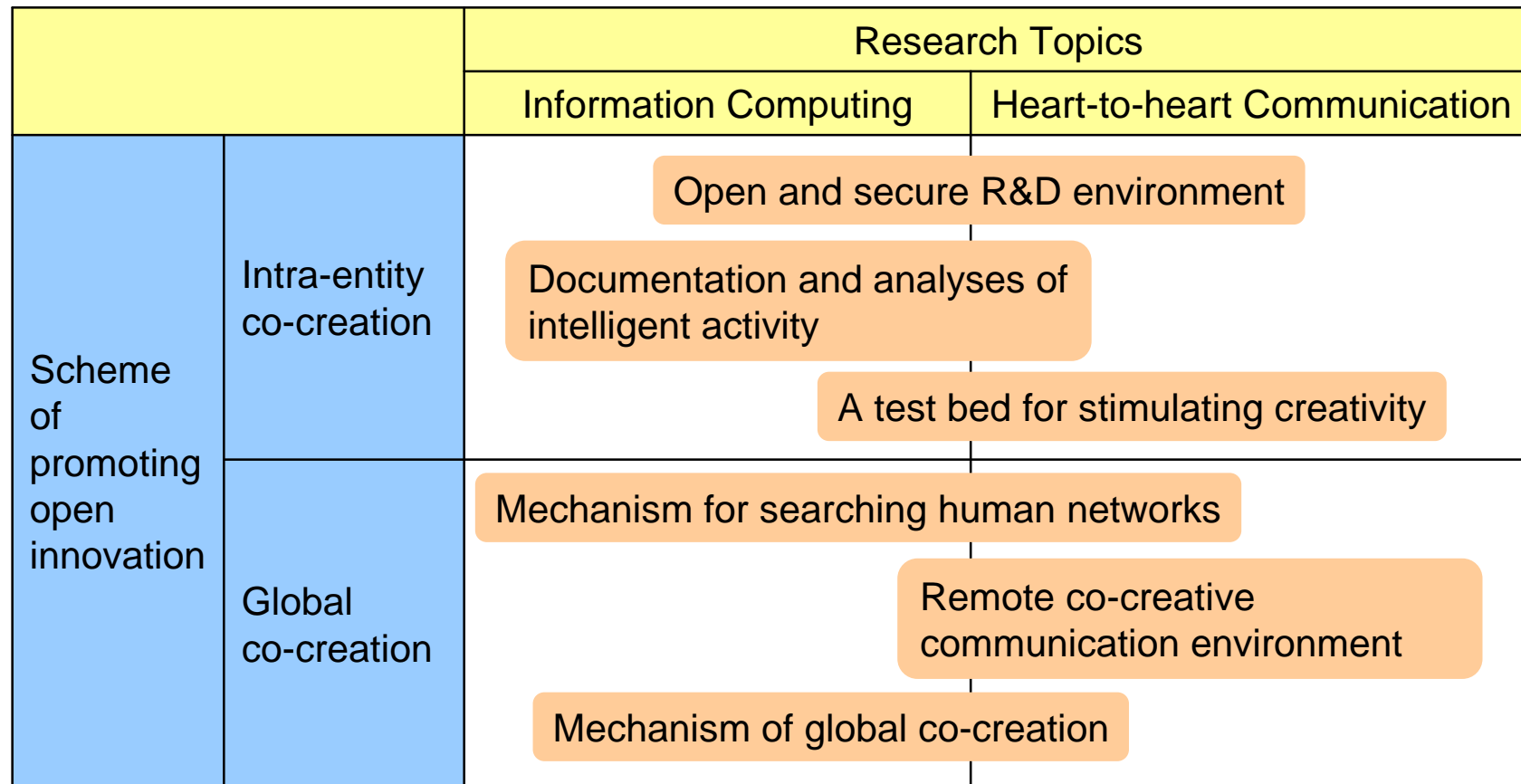
Open Software Center

- Promotion of OSS, **open standard-based** software

Open standard: Sharing specifications to expand software options

Private Enterprises' Approach for Open Innovation (1/2)

- ◆ Global open innovative R&D environment for collaboration with domestic and foreign universities, research institutions, and various industries



Source: NEC / C&C Innovation Research Laboratories

Private Enterprises' Approach for Open Innovation (2/2)



Various people stimulate each other



Life-sized remote communication

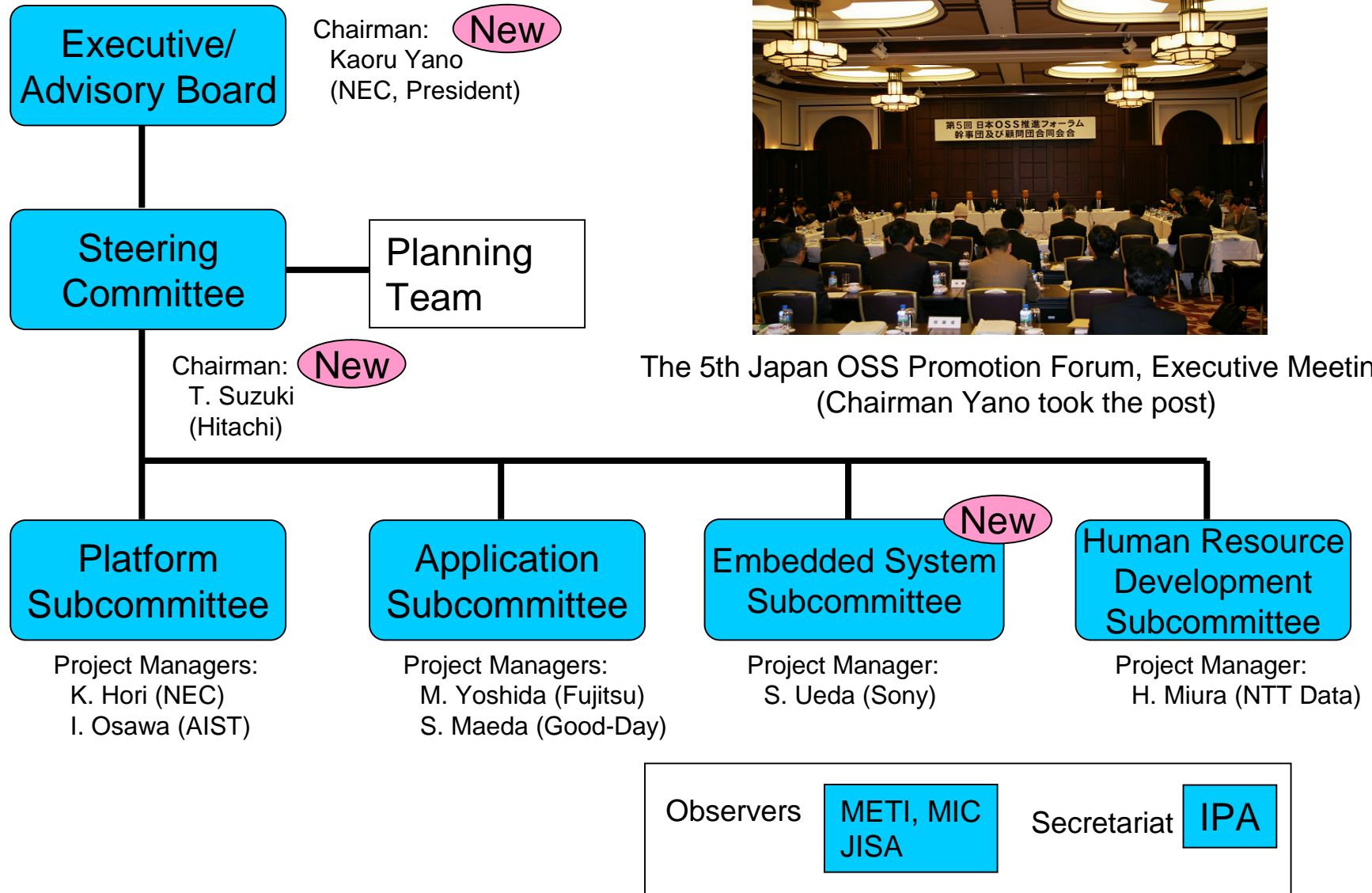


Free office space



Activities of Japan OSS Promotion Forum

Organization of Japan OSS Promotion Forum



JOPF Achievements

- Improvement of acceptance of OSS as a reliable software option
 - Improvement of user's confidence
 - OSS formally added to “Basic Policy of Governmental Procurement of Information Systems” by MIC* as a software option (Mar. 2007)

- OSS promotion
 - OSS Center established in IPA as an office to promote OSS (Jan. 2006)

- International collaboration in OSS with China and Korea
 - A private North-Eastern Asia OSS Promotion Forum was held coinciding with the governmental IT Director General meeting.
 - Three working groups established: each WG focusing its own agenda
 - Trilateral OSS projects (e. g. OpenDRIM, crackerjack, IM-BUS), spun out from working groups, started.

MIC*:Ministry of Internal Affairs and Communications

Reports published by Japan OSS Promotion Forum (FY2007)

SC / TF	Reports
Desktop SC / Issue Identification TF	Proposal for analysis and resolution of obstacles for dissemination of OSS desktop (English)
Desktop SC / Issue Identification TF	Proposal for analysis and resolution of obstacles for dissemination of OSS desktop (Revision 2006)
Server SC / Messaging DB TF	Report of Messaging DB Taskforce Activities
Server SC / Security TF	Evaluation of Security related OSS maturity
Desktop SC / Thin Client TF	Open Source Software Use Cases in Easy-to-Understand Educational PC

■ Background

- Increase of importance of OSS such as Linux as SW infrastructure in embedded devices (e. g. information appliances)
- In Japan, inter-enterprise OSS communities have been generated

■ Goals

- To promote OSS technology development of embedded system in communities
- To achieve industry consensus of OSS positioning and proposals for solutions

■ FY2008 Activity Plan

- Education of OSS's value and PR of OSS activities
- Achievement of industry consensus OSS positioning and publication of whitepapers
- Discussion on issues of OSS development and proposals for solutions
- Focus on information appliances and mobile phone

■ Platform SC

- Successful NE Asian OSS Promotion Forum WG1
- Solutions for server-related issues and challenges
- Strategy, recommendation for OSS policy, influence on active communities for expansion of OSS platform use

■ Application SC

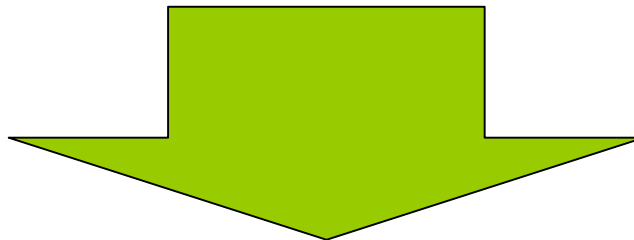
- Evaluation and deployment of OSS-based applications for further promotion of OSS
 - RubyonRails-base OSS application prototyping
 - Proposal for and support of advanced use cases in Japan

■ Human Resource Development SC

- Creation of the OSS-integrated environment for education
 - Co-development of model curriculum and promotion of essential materials with China and Korea
 - Continuing discussion on skill certification and interactions among resources

Conclusion

- OSS is transitioning from Early Adopter to Main Stream
- Steady growth of Japan OSS Promotion Forum
- Open innovation is critical



It is critical for Japan, China, and Korea to collaborate in education and training of OSS engineers who promote open innovation

Thanks

감사합니다



Northeast Asia OSS Promotion Forum WG1 Meeting in September 2008

多谢

有難うございました