

1

# Strategic Marketing Plan 2010

2

3

OpenOffice.org 2005-2010

4



OpenOffice.org Conference 2004

5

6



# Table of Contents

<b>Executive Summary</b> .....	<b>1</b>
<b>Community Review</b> .....	<b>2</b>
History.....	2
Goals .....	2
<b>Market Review</b> .....	<b>5</b>
Overview.....	5
Market Segmentation.....	5
Disruptive Marketing.....	7
<b>Product Review</b> .....	<b>9</b>
Summary.....	9
Distribution.....	9
Features and Benefits.....	10
<b>Competitor Review</b> .....	<b>12</b>
Microsoft Office.....	12
WordPerfect Office.....	14
Lotus SmartSuite.....	15
Other Office Suites.....	15
Other Competitors.....	15
<b>Market Segmentation</b> .....	<b>17</b>
Introduction.....	17
Target Markets.....	17
Non-target Markets.....	17
Government.....	18
Education.....	19
Public Libraries.....	21
Not-for-Profits (NFPs).....	23
Small-Medium Enterprises (SMEs).....	24
OEMs.....	26
Linux Distributions.....	27
<b>Review of the External Environment</b> .....	<b>28</b>
Social and Cultural Environment.....	28
Technological Environment.....	28
Economic Environment .....	29
Political and Legal Environment.....	29
<b>Strengths, Weaknesses, Opportunities, Threats</b> .....	<b>30</b>
SWOT Analysis.....	30
SWOT Recommendations.....	32
<b>Goals and Objectives</b> .....	<b>34</b>
Usage Goals.....	34
Marketing Objectives.....	35
Marketing Project.....	35
<b>Strategic Proposals</b> .....	<b>38</b>
Community.....	38
Product.....	38
Price.....	39
Distribution (Place).....	39
Promotion.....	41
<b>Appendix - Building the Plan</b> .....	<b>47</b>
Plan for the Plan.....	47
Strategy Development.....	47
Contributors.....	48
Copyright.....	48
Version History.....	48
<b>Alphabetical Index</b> .....	<b>49</b>
<b>References</b> .....	<b>51</b>



# Executive Summary

This document marks a major milestone in the development of a Strategic Marketing Plan for the OpenOffice.org office productivity suite<sup>i</sup>. Its publication is timed to coincide with the OpenOffice.org Conference 2004 (OOoCon 2004). Previous versions have had restricted circulation within the OpenOffice.org Marketing Project; this version launches the consultation process with the whole OpenOffice.org Community, aiming for a formal submission to the Community Council at the end of 2004.

The Plan looks at the current market for office productivity suites, at the major players in the field, and seeks to identify trends which will influence the market over the next five years. It looks at OpenOffice.org's place within the market now, and where it should aim to be by 2010.

The analysis looks at the strengths and weaknesses of the OpenOffice.org suite and of the Community, and how these should help influence the Community's response to opportunities and threats in the marketplace.

It also looks in detail at the features of OpenOffice.org and the benefits these deliver to customers. From this analysis, the Plan identifies a number of target markets whose needs are most closely matched by the benefits provided by OpenOffice.org.

Finally, the Plan sets targets for penetration by OpenOffice.org into these target markets, and lists the main strategies which the Marketing Project will use to achieve these goals. It looks at the governance of the Community, and the changes necessary for it to be able to deliver the Plan. Subsequent versions will give implementation milestones for the five years of the Plan.

The authors would like to thank all the members of the Marketing Project and other Community members who have contributed to this Plan to date. We look forward to starting a vigorous debate at OOoCon 2004 in Berlin. As the Plan evolves, the latest version will be available on the Marketing Project web site <http://marketing.openoffice.org>.

Comments and contributions are always invited to the Marketing Project's *strategy discussion* forum - see the Project pages for an archive and details of how to participate.

---

i This document is not a Strategic Marketing Plan for the OpenOffice.org Community, which is an entity which requires marketing in its own right



# Community Review

## History

StarDivision, the original author of the StarOffice suite of software, was founded in Germany in the mid-1980s. Its StarOffice product developed over the next decade into a fully-fledged office productivity suite (spreadsheet, word processor, graphics, presentations) comprising over 7.5 million lines of code, and equalling in functionality the market-leading product (Microsoft Office).

The company was acquired by Sun Microsystems Inc during the summer of 1999, and StarOffice 5.2 was released in June of 2000<sup>1</sup>. That same year, Sun made the momentous decision to open-source<sup>2</sup> the product as OpenOffice.org 1.0 and kick-start the OpenOffice.org Community (*the Community*) to support, develop, and promote the software under open-source principles<sup>3</sup>. At the same time, Sun decided to use the same codebase as the foundation for the continuing commercial StarOffice product.

## Goals

The Community<sup>ii</sup> was set up with the following mission statement:

### OpenOffice.org Mission Statement

To create, as a community, the leading international office suite that will run on all major platforms and provide access to all functionality and data through open-component based APIs and an XML-based file format.

## Success Criteria

The Community's Success Criteria are derived directly from the mission statement:

- (1) to grow a world wide Community capable of maintaining, developing, supporting, and promoting OpenOffice.org
- (2) to develop OpenOffice.org to provide all the features expected from a world class office productivity suite
- (3) to grow the market share of OpenOffice.org to a position of leadership
- (4) to design OpenOffice.org to support easy translation into any language (including complex text and vertical writing languages), and provide translations and support in local languages worldwide
- (5) to encourage porting to any computing platform capable of running the software (MS-Windows - all variants; Unix variants - e.g. Sun Solaris; Linux - all significant distributions; Apple Mac; etc)
- (6) to architect OpenOffice.org on a modular basis, callable from all major programming languages, and document fully all APIs<sup>4</sup>
- (7) to store all OpenOffice.org data in published XML formats and work with standards bodies to ensure compliance with emerging standards for office documents<sup>5</sup>

---

ii In this document, the term *OpenOffice.org* is always used to mean the *software*; the term *the Community* is used to refer to the OpenOffice.org *project*.

## Community Goals

### ***Financial Independence***

There are various business models for sustaining open-source activities. One model, used by Red Hat, is to charge customers subscription fees for services and support around free software. Open-source database company MySQL has a commercial licence for customers who want a support contract and a separate open-source licence<sup>6</sup>. Other companies, such as toolmaker Zend Technologies, charge for commercial products that are more functional than the open-source versions of their software. The Linux kernel itself is now developed largely by corporate employees<sup>7</sup>.

As of today (2004), both OpenOffice.org and the Community are heavily dependent on the support of Sun for their continued survival. The Community has set itself a challenge to become completely self-sufficient, and rely on volunteer effort and/or funds generated by the Community. Given the changing patterns within the global IT industry, this is a desirable position for the Community to be in. However, the challenge of reaching full financial and legal autonomy is not to be underestimated.

### ***Organisational Maturity***

As of summer 2004, some projects within the Community are well-supported and successful - for example, the native language projects are providing support for over 30 languages. Overall the Community is still immature in terms of governance, organisation, and ability to reach consensus and mobilise around an agreed plan. The creation of this Strategic Marketing Plan by the Community's Marketing Project (*the Project*) is part of this Community development process. It is recognised that the Community itself will need to change in order to adopt this Plan and those from other projects.

## Marketing Goals

The Project has sole or joint responsibility for the first five of the success criteria listed above. In the five years since launch, OpenOffice.org has been highly successful in attracting downloads<sup>8</sup> and distribution. However, its share of the global office productivity suite market is probably no more than a few percent<sup>9</sup>, with Microsoft's Office product (*MS-Office*) the firmly entrenched market leader.

Studies have shown the difficulty of replacing an established brand leader in conventional products. For example, one study was made of 25 brands that held the number one position. Sixty years later, 20 of those 25 brands still held the number one position. Similarly, studies show that historically, the top three brands in a product category typically occupy market share in a ratio of 4:2:1. Gartner Group predicted in May 2002 that the OpenOffice.org codebase could eventually reach 10% market share<sup>10</sup>.

On the other hand, academics such as Christensen have demonstrated that under certain conditions, newcomers can dethrone even the most firmly entrenched market leader (see *A Game Plan for Disruptive Marketing* on page 8). The project believes that with targeted marketing, OpenOffice.org can fit the criteria of being a 'disruptive technology', and that the ambition of being 'the leading international office suite' is achievable within the five year timescales of this Plan.

By 2010, the Project's goal is for the OpenOffice.org codebase to be in a position of market leadership (>50%) in all its target markets; for it to be the office suite of choice for a majority of all PC users; and for it to be in use by a significant percentage (>40%) of all office users worldwide. The analysis behind these targets is explained in *Target 2010* on page 35).

## Product Goals

Thanks to the long history of development, OpenOffice.org is a mature product and independent reviewers acknowledge that it 'provides the core functionality that most users need'<sup>11</sup>. The Community's goal is for OpenOffice.org to stay in this position of meeting all the needs of the typical 'office' user; to offer a simple and clean migration path from significant competitors; and to be available to users on the platform and in the language of their choosing.

The roles of the Marketing Project in meeting this product goal are primarily those of ensuring product development meets the evolving needs of users, and attracting members to the Community who will become active in any aspect of the Community's activities. As explained earlier, this Plan looks at the first of those roles.

# 1 Market Review

## 2 Overview

3 It is a truism that a PC is useless without software. Once an operating system has  
4 been installed, a PC can be used to run application software. While there is a  
5 market for PCs running specialised applications, the majority of PCs sold are used to  
6 run one or more 'office' applications for at least some of the time.

7 The potential market for office suites providing these applications is therefore  
8 almost as big as the market for PCs, and growing at the same dramatic rate (see  
9 *Target 2010* on page 35).

10 Currently, the market is dominated by the Microsoft Windows (MS-Windows)  
11 operating system, and within this platform, the dominant office suite by far is  
12 Microsoft Office (*MS-Office*) in its different versions.

## 13 Market Segmentation

### 14 What is an Office Suite

15 The concept of an *office suite* arose out of the limitations of legacy computing  
16 technologies. Word processors, spreadsheets, and drawing packages each met  
17 generic office user needs; bundling them together made good commercial sense.  
18 So, in *features*<sup>iii</sup> terms, an office suite is typically a bundle of a word processor,  
19 spreadsheet, and presentations package with a similar look and feel and  
20 interoperability.

21 However, in *benefits* terms, the Project would define an office suite as *a single*  
22 *package that helps a large population address the most common tasks in their*  
23 *working lives*. In today's internet-enabled offices suggests that the conventional  
24 trinity of applications is no longer sufficient. The Project contends that *a single*  
25 *package that helps a large population address the most common tasks in their*  
26 *working lives* is incomplete without at least email and web browser capabilities.

### 27 Types of Office Suite

28 Providing different 'flavours' of office suite enables COTS<sup>iv</sup> software vendors to  
29 achieve marketing goals including targeting different markets, introducing  
30 differential pricing, or extending the life of products.

#### 31 **Entry Level**

32 These software packages provide basic 'office' functionality within a single offering  
33 (e.g. Microsoft Works). The Project contends that users are *constrained into* this  
34 segment by one or more limiting factors, such as: price (the user cannot afford  
35 anything better); requirements (the user's needs are completely met by the  
36 product); hardware (the users PC cannot run bigger software); knowledge (the user  
37 believes they can only use this product); and so on.

---

iii See *Features and Benefits* on page 11

iv COTS = Commercial Off The Shelf, as opposed to open-source packages

## **Full Function**

The usual definition of office 'suite' refers to more powerful separate packages which inter-operate closely with a common look and feel (e.g. MS-Office with *Word*, *Excel*, and *Powerpoint*).

## **Professional**

'Professional' editions of office suites add in other packages, for example, databases and photo-editors.

## **Internet enabled**

Increasingly, customers expect office suites to also provide internet capabilities such as:

- web browser / html editing
- email
- groupware (e.g. shared calendars)

According to the definitions above, OpenOffice.org falls between the *Full Function* and *Professional* market segments, with some elements of internet enablement.

## **StarOffice and OpenOffice.org**

Sun Microsystems' decision to open-source the OpenOffice.org codebase has created a de-facto segmentation of the market by licence, with the same underlying codebase available under open-source licencing (as OpenOffice.org) and as a COTS product (StarOffice).

The two different product offerings are targeted at two different market segments, although there is a considerable 'grey area' in between.

Some typical key differentiators are as follows:

### **Reasons for preferring StarOffice to OpenOffice.org**

A user currently has a licenced competitive COTS product  
Company policy forbids open-source software  
There is a requirement to purchase world-class support from a large vendor  
A company needs the security of having a large corporate supplier to sue if anything goes wrong  
A user needs the additional commercial products included in StarOffice (fonts, Adabas database, etc.)

### **Reasons for preferring OpenOffice.org to StarOffice**

A user does not currently have a licenced competitive COTS product  
StarOffice is not available in the user's local language/on their chosen platform  
An organisation wants to minimise its acquisition cost  
A user believes in the principle of open-source software  
An organisation would like to be able to give away copies of the software (e.g. to students, employees, etc.)

## Other products using the OpenOffice.org codebase

The OpenOffice.org open-source licence allows the OpenOffice.org codebase to be used as the basis of other software products, both free or commercial (although there are some restrictions on how the code can be used).

Products have already emerged based on the OpenOffice.org codebase, for example, versions targeted at particular sectors<sup>12</sup>, or geographies<sup>13</sup>, or operating systems<sup>14</sup>. Sun Microsystems have also actively encouraged the emergence of commercial products based on the codebase (AOL Office, Novell Office, Lycoris Office, etc)

Given the diversity of the open-source development community, it is also inevitable that other development streams will emerge<sup>15</sup>. For example, the Ximian 'fork' of OpenOffice.org - has attracted contributions from the Fedora and Debian communities, some of whose developers are uncomfortable with the Community licence / development model, or with software which has any dependencies on non-free software (such as Java).

The Project considers that these developments all contribute to the adoption of the OpenOffice.org codebase, and as such are welcomed. However, the Project's main focus is on the branded OpenOffice.org product, and as such aims that:

- all users of the codebase are actively encouraged to give prominence to the fact they are based on the OpenOffice.org codebase
- on a reciprocal basis, the Project should use third party brands to build product credibility (AOL is a bigger consumer brand than OpenOffice.org or Sun Microsystems)
- any improvements to OpenOffice.org should be fed back into the Community
- the Community should work to remove any barriers which prevent people contributing to the Community

## Disruptive Marketing

*Marketing Goals* on page 4 noted that delivering the Community's Mission Statement means creating *disruptive change* in the marketplace. The seminal text on disruptive change - *The Innovator's Solution*<sup>16</sup> provides some strategy guidelines for identifying target markets:

### **A Game Plan for Disruptive Marketing**

Target only those customers and markets that look unattractive to every established competitor. If an idea is sustaining (an improved version of an already available and popular product) relative to even a single competitor, the idea will not succeed as a disruption.

Try to compete against nonconsumption: customers who are currently unable to use currently available products at all, either because they can't afford them or are too inexperienced to use them. These markets have the most potential because these customers will compare your product to having nothing at all, and so will be thrilled to buy it even if it's inferior to currently available products.

If there are no nonconsumers available, explore the feasibility of a low-end disruption instead: customers who can't use all the functionality they currently have to pay for and who won't pay premium prices for upgraded products. If this isn't possible either, and you're not an industry incumbent, don't invest in the idea.

1 When searching for ideas with disruptive potential, look for ways to help  
2 customers get done more conveniently and inexpensively what they are already  
3 trying to do. Don't invent new problems for customers to solve - they won't  
4 reprioritise what's important in their lives just because your product is available.

5 (It is worth noting that OpenOffice.org is arguably an even more disruptive product  
6 than these authors envisaged: a product offering similar features to the market  
7 leader but available for little or no cost.)

8 Within these guidelines, the Project has identified a number of market segments  
9 where the benefits of using OpenOffice.org provide a particularly good match to the  
10 needs of the market. It has also identified a number of segments where the fit is  
11 less good. A detailed analysis of the product features of OpenOffice.org and the  
12 benefits perceived by users is given below in *Features and Benefits* on page 11. The  
13 full analysis of the target markets is given below in *Market Segmentation* on page  
14 18.

# Product Review

## Summary

OpenOffice.org suite consists of four major applications:

- Writer - word processor
- Calc - spreadsheet
- Impress - presentations
- Draw - graphics

Writer also operates as a web page (HTML) editor.

These applications were originally a single 'desktop' within StarOffice which has now been separated into four applications. This gives them a high degree of commonality (more so than MS-Office, which started life as separate packages which have been blended together).

In addition, there are three utilities which operate across the major components:

- a mathematical formula editor
- macro / Basic programming language
- Data Access tools for working with SQL databases

OpenOffice.org does not contain:

- email / calendar tools
- a web browser
- a database (although dBase format tables can be used out of the box with OpenOffice.org's Data Access tools)

Independent reviews rate OpenOffice.org as capable as its competitors in terms of functionality<sup>17</sup>. However, it does lack some end-user 'extras' such as printed manuals, templates, clip-art libraries, etc.

OpenOffice.org is available for the following platforms:

- Microsoft Windows (98, NT, ME, 2000 and XP)
- GNU/Linux
- Sun Solaris 8 Operating Environment
- Mac OS X Darwin PPC (within X)

Some of the newer features require installation of a Java Runtime Environment (JRE).

OpenOffice.org is available in over 30 languages.

## Distribution

OpenOffice.org can be downloaded free of charge from the OpenOffice.org website or worldwide mirrors. Many Linux distributions now include OpenOffice.org, although some have removed some functionality for licencing reasons. It is also bundled by some hard/removable disk drive and PC manufacturers.

OpenOffice.org can also be obtained on CD in different forms in different markets:

- some public libraries stock and loan the software
- commercial distributors offer the product for sale
- it has appeared on cover CDs with magazines
- it appears in software bundles such as the OpenCD

## Features and Benefits

It is a marketing axiom that consumers do not choose a product on the features that it offers, but on the benefits (real or perceived) that it brings.

This section lists the distinctive features of OpenOffice.org and the benefits that these bring to users.

<b>Feature</b>	<b>Benefit</b>
Open-source licence	No licence fees to pay for installation or upgrade
	No licence/compliance hassles or need for software audits
	Can be given away free
	Source code can be inspected for 'trojans' etc
	Individuals or companies can contribute directly to product development or supplying a missing feature
Open APIs	Can be included in other software
MS-Office file compatibility	Easy to migrate
	Easy to exchange documents with MS-Office users
MS-Office look and feel	Operations are similar enough to make migration easy
Creates PDFs	Saves buying Adobe Acrobat
	What you send is what people receive
	Issue documents as 'read only'
Open XML file formats	Data can be easily used in other software products
	File format cannot be 'time-expired' by a vendor
	File contents can be examined for 'unwanted' content using simple PC tools
	Compression means files typically are smaller than MS-Office equivalents
Long development history	Stable product, less liable to crash
Origins as a single integrated product	Open any file from any application
	Common user interface across all components
Cross platform	Good product to teach/learn: learn once, use anywhere
	Free to choose where you run it
Multiple language support	Likely to be available in your language
Designed to be multi-lingual	Easy to translate
Community support	Direct access to developers

<b>Feature</b>	<b>Benefit</b>
Community is not just a coding project	Lots of possibilities for contributors
Not Microsoft	Monopoly suppliers generate strong feelings
Network or single install	Equally suited for home users or institutional users
Advanced user features e.g. stylesheets	Also suited for power users - e.g. Writer can produce complete books

# Competitor Review

## Microsoft Office

MS-Office is the biggest player in the office suite market. The product's market dominance is such that any potential competitor has to be able to demonstrate a migration path from and interoperability with MS-Office:

Migration from MS-Office	requires ability to re-use MS-Office documents
	must be easy to use by people already familiar with MS-Office
Interoperability with MS-Office	requires ability to read and write MS-Office documents

MS-Office has its roots in three quite separate software packages rather than as a single office suite, and there are places where the joins still show.

## Microsoft Inc

Microsoft are one of the largest corporations in the world with huge financial resources and legendary marketing prowess. Their virtual monopoly of the desktop PC operating system market<sup>18</sup> means they have the resources to make mistakes - e.g. covering losses in the games machine market while they refine their product offering.

On the other hand corporations of this size and market dominance make enemies (see box)

### Some Reluctant Microsoft Customers

- corporations who do not like dealing with monopoly suppliers
- governments who dislike companies with a turnover exceeding their own GNP
- individuals who resent the wealth of prominent Microsoft employees
- trading blocs with open market / anti-monopoly policies

## Microsoft Office

MS-Office is sold in a variety of different formats in different markets and at different times. It is also periodically relaunched as an upgraded or enhanced product. As many corporate users sign up for multiyear upgrade contracts, Microsoft has a considerable interest in allowing no more than three years - the maximum length of a multiyear contract - between versions.

Microsoft report sales of MS-Office within their 'Information Worker' business segment - an over \$1,000 million business in 2004. Microsoft recognise three separate revenue streams from the 'Information Worker' business segment: original licence sales (approx 40% of total revenues); licence upgrades / maintenance contracts (40%); and software 'bundled' with new PCs (about 20%).

## Editions

MS-Office is sold in a variety of different editions, with increasing features for increasing cost, for example:

## 1 **Standard**

- 2 • Excel (spreadsheet)
- 3 • Outlook (email client)
- 4 • PowerPoint (presentations)
- 5 • Word (word processor)

## 6 **Small Business**

- 7 • as Standard, plus:
- 8 • Business Contact Manager (for Outlook)
- 9 • Publisher (desktop publisher)

## 10 **Professional**

- 11 • as Business, plus:
- 12 • XML support (for Word)
- 13 • Access (database)

14 In terms of functionality, independent reviews agree there is very little to choose  
15 between OpenOffice.org and MS-Office 'Standard' for the vast majority of users,  
16 although OpenOffice.org lacks the templates, clip-art etc. bundled with MS-Office.

## 17 **Platforms and Languages**

18 MS-Office is available for MS-Windows and also as Microsoft Office for Mac (the Mac  
19 editions are slightly different from the MS-Windows editions). MS-Office is available  
20 for over 35 localised versions.

## 21 **Pricing**

22 Microsoft - theoretically - operates a single price list world wide. However, there are  
23 many examples of it offering substantial discounts when forced to do so to  
24 safeguard market share, while maintaining the convenient fiction of a single price  
25 (see *Competitive Position* below). Large volume enterprise customers are also  
26 offered substantial discounts<sup>19</sup>, and in many markets 'educational' versions are  
27 available at substantial discounts.

## 28 **Marketing**

29 Microsoft has a massive marketing budget and promotes its products widely  
30 throughout the world and throughout all the different media types. Its estimated  
31 advertising spend is between \$5,000-\$10,000 million per annum. Spend typically  
32 peaks towards the launch of new products / re-launch of existing products (e.g. the  
33 launch of Windows XP and the Xbox clocked up \$1,500 million).

## 34 **Goals**

35 Microsoft's goal is to dominate the office suite market in the same way as it has  
36 dominated the desktop operating systems market. Dominating the office suite  
37 market does not have quite the same sensitivities as the operating systems market,  
38 giving Microsoft more room for manoeuvre without incurring the wrath of  
39 competition regulators.

40 Recently announced development plans for MS-Office suggest that Microsoft is  
41 seeking to create closer integration between products within the 'Information  
42 Worker' product group. This would further increase their competitive 'lock-in' and  
43 discourage migration away from MS-Office to competitive products.

## Competitive Position

Microsoft is finding the need to protect its market share from the growth of open-source competition. This has been noticeable at the operating system level, with various 'knocking' campaigns against open-source, and most recently (mid 2004) a high-profile campaign to 'prove' that open-source is a more expensive computing platform than Microsoft. In at least one country, this campaign fell foul of the national advertising regulatory authority for its blatantly unsupportable claims<sup>20</sup>.

Microsoft has also admitted in a filing to the US Securities and Exchange Commissions that it is prepared to use price cutting to defend market share: "To the extent opens source software gains increasing market acceptance, sales of our products may decline, we may have to reduce the prices we charge for our products, and revenue and operating margins may consequently decline."<sup>21</sup>

OpenOffice.org has also had a part to play here, with Microsoft reacting to defend its market position whenever OpenOffice.org has threatened MS-Office's position:

### **How Microsoft has responded to competitive threats from OpenOffice.org**

- after years of inaction, Microsoft has suddenly released new translations of MS-Office in response to OpenOffice.org local language releases<sup>22</sup>
- where OpenOffice.org has proved successful in developing markets, Microsoft has effectively reduced the price of MS-Office with the release of special low cost local editions of MS-Office<sup>23</sup>

## WordPerfect Office

WordPerfect Office is owned by Corel, who like Microsoft, has taken separate packages and gradually merged them into an 'office' suite. Corel's packages consist of a very good word processor (which gives the suite its name), a perfectly respectable spreadsheet, and an alright graphics package<sup>v</sup>. The suite offers similar features to OpenOffice.org (e.g. pdf, html, xml creation), and works hard at providing a smooth migration path from MS-Office with various 'compatibility' modes. WordPerfect retains a loyal following in several niche markets, such as the legal profession in several territories.

### **Editions**

#### ***Basic***

- WordPerfect (word processor)
- Quattro Pro (spreadsheet)
- Presentations (presentations)

#### ***Professional and Education***

- as above, plus
- Paradox (relational database)

### **Platforms and Languages**

Support in varying degrees for 'up to 30 languages'. WordPerfect Office is an MS-Windows application, although a 'proof of concept' version of WordPerfect for Linux is in beta testing

---

vCorel also sell separately a well respected range of graphics products.

## 1 Lotus SmartSuite

2 Lotus SmartSuite is owned by IBM, and sits somewhat uncomfortably among their  
3 other Lotus family of products. IBM do not appear to be actively marketing the  
4 product, focussing on server-based offerings like Lotus Workplace Documents.

5 Lotus SmartSuite features these applications:

- 6 • 1-2-3 (spreadsheet)
- 7 • Word Pro (word processor with IBM ViaVoice)
- 8 • Organizer (personal information manager)
- 9 • Freelance Graphics (presentation graphics package)
- 10 • Approach (relational database)

## 11 Platforms and Languages

12 Lotus Smartsuite is available in Global English (sic), French, German, Danish, Dutch,  
13 Italian, Spanish, Brazilian Portuguese, Norwegian, Swedish, and Finnish. It is an MS-  
14 Windows application (including installation via MSI, the Microsoft Software Installer),  
15 plus a legacy version is available for OS/2.

## 16 Other Office Suites

17 There are a number of other minor products such as Hancorn Office, Ability Office,  
18 etc, but few which are genuine multi-platform and international and none which  
19 command a significant market share.

## 20 Other Competitors

### 21 Single-function Office Products

22 There are also products which may be classed as 'imperfect competitors', such as  
23 stand alone word-processors, spreadsheets, etc. These are not considered as direct  
24 competition in this Plan, although they may offer opportunities for migration of  
25 existing users.

### 26 Alternatives to Desktop Office Suites

27 It is also worth noting that the benefits provided by office suites can be provided by  
28 mechanisms other than the installation of full applications on a PC.

#### 29 **Server based**

30 There have been a number of attempts to provide office functionality from a central  
31 server to thin clients, ranging from dumb terminals, through network PCs/thin  
32 clients, to browsers running on PCs. Sun Microsystems has been a keen proponent  
33 of network PCs in the past<sup>24</sup>, although its enthusiasm seems to have diminished of  
34 late. There are rumours IBM may be readying an office suite using this technology -  
35 *IBM's new software is designed to be distributed and accessed through a Web*  
36 *server*<sup>25</sup>. It is not clear whether this is different from their Lotus Workplace  
37 Documents product, which *offers word processing, spreadsheet, and presentation*  
38 *editors that allow users to edit documents even when the editors with which these*  
39 *documents were originally created are unavailable*<sup>26</sup>.

40 As of now, these products are aimed at niche markets, and so are not considered  
41 further in this Plan.

1            ***Internet based***

2            A number of attempts have been made to provide office functionality over the  
3            internet<sup>27</sup>. It is possible that by 2010 wireless and other technologies may have  
4            developed sufficiently for this to be a viable alternative. If this happens, then  
5            OpenOffice.org could well form the 'engine' behind such a service. However, it is  
6            considered too speculative to be considered further in this Plan.

# 1 Market Segmentation

## 2 Introduction

3 This section of the Plan attempts to identify groups of users who have *similar needs*  
4 for an office productivity product. Those whose *needs* are most closely matched by  
5 the *benefits* provided by OpenOffice.org (see *Features and Benefits* on page 11) will  
6 be the most likely candidates for using the product.

## 7 Target Markets

8 Selection of target markets is guided by two main criteria:

- 9 • do the benefits of OpenOffice.org provide a better match to the market's needs  
10 than the competitors?
- 11 • does the market have the characteristics of an adopter of a disruptive innovation  
12 (see *A Game Plan for Disruptive Marketing* on page 8)?

13 This Plan argues that the benefits provided by OpenOffice.org are a particularly  
14 good match to the needs of the following target markets:

- 15 • governments (especially in the developing world);
- 16 • education establishments (schools, colleges, universities);
- 17 • public libraries;
- 18 • small/medium enterprises (SMEs);
- 19 • NFPs (Not-For-Profits – charities, voluntary sector, etc);
- 20 • OEMs - Own Equipment Manufacturers building PCs with pre-installed software,  
21 especially for the low-cost / home end market
- 22 • Linux distributions looking for an office suite to 'bundle'

23 These are the markets where the Community should aim to achieve market  
24 domination by the OpenOffice.org branded product.

## 25 Non-target Markets

26 In addition, there are many markets which will be targets for the OpenOffice.org  
27 codebase under different branding (such as StarOffice). For example, multinational  
28 corporations would be a more obvious target for a fully commercially supported  
29 product like StarOffice than a community supported product like OpenOffice.org  
30 (see *StarOffice and OpenOffice.org* on page 7). These organisations are more likely  
31 to have a heavy investment in competitor products and will require assistance  
32 during migration. They will probably also have current volume purchasing  
33 agreements in place. For these markets, adopting an office suite based on  
34 OpenOffice.org is a *sustaining* innovation rather than a *disruptive* one.

35 However, it is also recognised that there will be cases where this simplistic  
36 target/non-target split will not apply. For example, 'Government' is a target market  
37 in the OpenOffice list: however, 'first world' governments may prefer dealing with a  
38 commercial organisation.

# 1 Government

## 2 Description of the sector

3 Governments at all levels (supra-national; national / federal; regional / state, local)  
4 especially in developing countries

## 5 Needs and Benefits

6 The table below shows how the benefits of OpenOffice.org match the needs of the  
7 government sector:

<i><b>Needs</b></i>	<i><b>Benefit</b></i>
Must display openness, compliance, and value for money	Effectively free to acquire
	No licence/compliance hassles
	Can be given away free
Probably a legacy Microsoft user	Easy to migrate
Need to distribute documents widely	Saves buying Adobe Acrobat
	What you send is what people receive
	Issue documents as 'read only'
Long term data retention	You own your data - future proof
Multi-ethnic support	Likely to be available in your language
Worried about US software companies	No hidden back doors, trojans, etc
	Monopoly suppliers generate strong feelings

## 8 Routes to Market

9 Most likely to be receptive to lobbying through local activists, opinion formers,  
10 political party members. Requires Community members on the ground and familiar  
11 with the market.

## 12 Special Needs

13 StarOffice is a realistic alternative in most affluent countries.

14 OpenOffice.org's ease of translation is a strong plus point in multi-lingual  
15 communities, especially if the translation can be sponsored by the government  
16 body concerned.

# 1 Education

## 2 Description of the sector

3 Includes all educational establishments: schools, colleges, universities, etc.

## 4 Needs and Benefits

5 The table below shows how the benefits of OpenOffice.org match the needs of the  
6 education sector:

<i>Needs</i>	<i>Benefit</i>
Skills taught should be as 'generic' as possible	File and look and feel compatibility with MS-Office
Being able to give away software is a good 'selling point' for courses	OpenOffice.org software can be given away free
Need to demonstrate value for money	open-source licence means acquisition costs are zero
Build co-operative skills across the internet	international community with multiple opportunities for participation
Worries about licence compliance / ability to audit PCs	No licence/compliance hassles
Need to give students marketable skills	Similar enough look and feel to MS-Office
	Easy to exchange documents with MS-Office users
	Good product to teach/learn: learn once, use anywhere
Needs to be available in local languages (could be translated as a community effort)	Likely to be available in your language
	Easy to translate
Needs to be simple to administrate	Network installation available

## 7 Routes to Market

8 For state run schools, a two pronged attack has proved successful:

- 9
- 10 • government via politicians and civil servants
  - grass roots through the schools themselves.

11 Each levers the other: governments are more convinced if the grass roots response  
12 looks good, grass roots confidence is enhanced by government leadership.

13 Cisco, Oracle, Microsoft all have Academy programmes they are bringing into  
14 schools. Their vulnerability is that they focus on post 16. There is also ECDL/ICDL,  
15 but again it's focussed on older students.

16 The Project recommends we should aim to get in earlier with 7 and 8 year olds.  
17 These children can use OpenOffice.org; there is no need to wait until they are 16.  
18 The Project cannot compete head to head with companies with the resources of  
19 those above. The Project can be smarter in a market they really don't understand.

1 As with all other sectors, there is no substitute for knowing and understanding how  
2 the market works, being in tune with the culture and speaking the language of the  
3 culture.

#### 4 **Special Needs**

- 5 • an Access style database
- 6 • there is a lot of content and support material for MS-Office and very little for  
7 OpenOffice.org
- 8 • difficulty in network installations on Windows XP
- 9 • lack of brand awareness, confusion between StarOffice (which is available free  
10 under Sun's Educational Licencing scheme<sup>28</sup>).

# 1 Public Libraries

## 2 Description of the sector

3 Lending libraries, both privately and publicly funded. Small libraries with no budget  
4 and teaching facilities are likely to be more receptive in the early stages rather than  
5 big libraries that are used to big donations. All libraries are in scope, including  
6 school libraries, voluntary organisations, teaching hospitals, community colleges,  
7 etc.

## 8 Needs and Benefits

9 The table below shows how the benefits of OpenOffice.org match the needs of the  
10 public library sector:

<b>Needs</b>	<b>Benefit</b>
Value for money	No licence fees to pay for installation or upgrade
	No licence/compliance hassles
	Can be given away free
Need to be compatible with MS-Office	Easy to exchange documents with MS-Office users
	Operations are similar enough to make migration easy
Should be able to loan software to the greatest number of users	Available on many platforms
Multi-lingual features useful	Likely to be available in your language

## 11 Routes to Market

12 Bob Kerr has written a comprehensive HOW-TO<sup>29</sup>, based on his experience of  
13 persuading the public libraries in Edinburgh, Scotland to stock OpenOffice.org CDs.  
14 This is a model case study in exploring the needs of a market, developing an  
15 understanding of the customer's perspective, and tailoring a solution that is  
16 acceptable to them. Some of Bob's key points are summarised and paraphrased in  
17 the box below.

### 18 Supplying Public Libraries

- 19 • Trust: you have to persuade the library you are a credible source
- 20 • Liability: libraries worry about incurring liability for technical support, viruses,  
21 copyright issues, replacement media, etc.
- 22 • Longevity - the library has to be convinced of that it is worth their time and  
23 effort to stock the CD and that it is 'borrower-proof'
- 24 • Preconceptions: just like other markets, libraries also need convincing "how can  
25 software this good be free"

26 Bob's document is a model of its type and is recommended reading in full for all  
27 Project members, especially MarCons.

## Special Needs

Again, the box below is a poor summary of recommendations in Bob Kerr's HOW-TO:

### **Producing open-source CDs for Public Lending Libraries**

- Where possible the CD cover should follow the guidelines set out in the ISBN Users Manual published by The International Standard Book Number System Agency, (International Edition).
- On the cover of the CD there should be a clearly printed disclaimer covering support, liability, etc
- All CDs must be pressed or high quality CDs and not CDR or CDRW, preferably in DVD covers
- The library cannot endorse any product. Advertising on the cover to an unconnected third party is not acceptable.
- A valid and respected vendor of replacement pressed CDs should be made known to the Library.
- Only major releases will be considered for the library catalogue.

# 1 Not-for-Profits (NFPs)

## 2 Description of the sector

3 Organisations run on non-commercial status: charities, voluntary organisations,  
4 non-governmental organisations, and so on. The size of this sector often comes as  
5 a surprise to people used to dealing with commercial organisations - e.g. there are  
6 700,000 registered NFPs in Australia.

## 7 Needs and Benefits

8 The table below shows how the benefits of OpenOffice.org match the needs of the  
9 NFP sector:

<b>Needs</b>	<b>Benefit</b>
Need to minimise costs	No licence fees to pay for installation or upgrade
Cannot afford licence issues / audits	No licence/compliance hassles
Useful to be able to share with volunteers	Can be given away free
Probably legacy MS-Office users	Easy to migrate
Need to be compatible with MS-Office users	Easy to exchange documents with MS-Office users
Cannot afford re-training	Operations are similar enough to make migration easy
Cannot afford vendor-enforced upgrades	File format cannot be 'time-expired' by a vendor
May need to operate in multiple, possibly local minority languages	Likely to be available in your language
	Easy to translate

## 10 Routes to Market

11 NFPs can often be reached via funding bodies, digital divide bodies, and circuit  
12 riders (volunteers providing IT support for NFPs).<sup>30</sup>

## 13 Special Needs

14 Like SMEs, many NFPs have minimal in-house IT expertise and require easy-to-use  
15 products. However, they are used to the idea of community working and are more  
16 receptive to community support.

# 1 **Small-Medium Enterprises (SMEs)**

## 2 **Description of the sector**

3 Variously known as Small-Medium Enterprises (SMEs), Small Medium Businesses  
4 (SMBs), this sector also has a wide variety of definitions, but also is a highly  
5 significant sector of most countries' economies (43% of GDP in South Africa<sup>31</sup>; 49%  
6 of the workforce in Australia, etc).

7 This sector is attractive to open-source marketeers as it is both price-sensitive and  
8 below the threshold for most COTS volume purchase agreements.

## 9 **Needs and Benefits**

10 The table below shows how the benefits of OpenOffice.org match the needs of the  
11 SME sector:

<b>Needs</b>	<b>Benefit</b>
Need to minimise costs	No licence fees to pay for installation or upgrade
Cannot afford licence compliance issues / audits	No licence/compliance hassles
Useful for employees to be able to use at home	Can be given away free
Probably legacy MS-Office users	Easy to migrate
Need to exchange documents with MS-Office users	Easy to exchange documents with MS-Office users
Don't want to have to retrain staff	Operations are similar enough to make migration easy
Ability to send documents via email as pdfs is useful	Saves buying Adobe Acrobat
	What you send is what people receive
	Issue documents as 'read only'
Don't want to be forced by vendors to upgrade	File format cannot be 'time-expired' by a vendor
Trouble-free operation essential	Stable product, less liable to crash
Needs to be in the local language	Likely to be available in your language
	Easy to translate
May be tempted by full commercial support	Same code available commercially

## 12 **Routes to Market**

13 Local business development agencies; education establishments providing 'start  
14 your own business' courses; SME networking organisations.

## Special Needs

A rule of thumb is that the threshold for employing full-time IT professional is around 30 users. This means that many SMEs do not have the IT specialists to tap the standard open-source support networks of on-line mailing lists, support forums, etc. OpenOffice.org is technically a much simpler product to support than say an open-source file, print, and mail server, but availability of local rapid support even on a commercial basis can be key to winning business - especially if help is needed with data migration from another product.

# OEMs

## Description of the sector

PC manufacturers / builders supplying PCs with pre-installed software 'bundles'

## Needs and Benefits

The table below shows how the benefits of OpenOffice.org match the needs of the OEM sector

<b>Needs</b>	<b>Benefit</b>
Deliver the best PC 'bundle' at the lowest cost	No licence fees to pay for installation or upgrade
	No licence/compliance hassles
	Can be given away free
Potential purchasers may be legacy MS-Office users	Easy to migrate
	Easy to exchange documents with MS-Office users
	Operations are similar enough to make migration easy
Any value-added features add to attractiveness of product, e.g. ability to create pdfs	Saves buying Adobe Acrobat
Don't want support issues	Stable product, less liable to crash
Needs to be available in local language	Likely to be available in your language
Avoid cumbersome licencing terms	Not Microsoft

## Routes to Market

The largest OEMs of PCs currently enjoy close relationships with Microsoft - indeed, the relationship is so close that it was legally constrained in the US courts under Judge Thomas Penfold Jackson's judgement in a Microsoft anti-trust case<sup>32</sup>. Unfortunately, this judgement did not cover office software.

Applying disruptive marketing rules, OpenOffice.org is likely to find greater acceptance among OEMs aspiring to usurp the likes of Dell etc rather than among the current 'top 20'.

## Special Needs

Ease of installation is seen as key to this sector - OpenOffice.org needs to equal Microsoft's OEM Pre-Installation Kits (OPK) in ease-of-use for OEMs.

# 1 Linux Distributions

## 2 Description of the sector

3 Linux<sup>vi</sup> is increasingly being recognised by mainstream IT pundits as 'ready for  
4 deployment on the desktop'. OpenOffice.org is currently the only fully-featured  
5 office suite available for this platform.

6 Linux users also tend to be familiar with the way the open-source community  
7 operates. Software professionals using Linux are also an important potential source  
8 of developers for OpenOffice.org.

## 9 Needs and Benefits

10 The table below shows how the benefits of OpenOffice.org match the needs of  
11 open-source advocates:

<b>Needs</b>	<b>Benefit</b>
Must meet community's open-source definitions	LGPL licence; OASIS member for XML file formats
Need access to source	Source code freely available
	Individuals or companies can contribute directly to product development or supplying a missing feature
	Can be included in other software
Reliable, fully-featured product	Stable product, less liable to crash
May wish to join in Community activities	Lots of possibilities for contributors
Must not be Microsoft	Monopoly suppliers generate strong feelings

## 12 Routes to Market

13 To date, most major Linux distributions have been happy to accept the  
14 OpenOffice.org source and include it in their distributions.

## 15 Special Needs

16 Different distributions have different packaging formats (.deb, .rpm, etc). Building  
17 binaries in all these formats can slow down the release process and also increases  
18 the storage requirements on download mirrors etc.

19 Some distributions refuse to include any non open-source dependencies in their  
20 distributions. As OpenOffice.org is not certified with an open-source Java runtime,  
21 this has led to some distributions disabling the parts of OpenOffice.org which  
22 require a JRE.

---

vi More accurately, GNU/Linux

# Review of the External Environment

This section of the Plan looks at trends in the outside world which could impact OpenOffice.org and the Community using the common Social, Technological, Environment, and Political (STEP) model<sup>33</sup>. These factors can constitute either threats or opportunities (or in some cases both) to OpenOffice.org and/or the Community.

## Social and Cultural Environment

Social factors include the demographics and cultural factors which affect customer needs and the size of potential markets. Some social factors include:

- the world's biggest potential markets (e.g. China) are showing a keen interest in open-source software<sup>34</sup>
- the open-source community continues to generate other high quality, cross-platform, multi-lingual software products
- the cost of providing local language support for increasing numbers of smaller markets cannot be justified by conventional commercial software houses
- PC users increasingly expect PCs to have office software installed at the time of purchase
- the average user's need for office software is being met comfortably by the features of current products
- as email and web browsing become commonplace in offices, users will expect these applications to be included in the definition of an 'office suite'
- people are becoming more comfortable with the concept of online communities as ways of working and co-operating around the world
- in many territories, women are an 'emerging market' for IT/internet. Women appear to be more open to talking about the community surrounding open-source software. This is particularly true if they have children who are interested in computers, and have concerns about employment for older children
- there is a tendency for employers to specify (e.g.) *must have MS-Word skills* rather than *must have word processing skills* which may deter potential users

## Technological Environment

OpenOffice.org can be expected to benefit as the concept of open-source software becomes more widely understood and accepted. Development of the internet infrastructure will make access to the software easier and open up new possibilities for involvement in online communities

- the Microsoft monoculture is raising an awareness of the danger of viruses
- as Linux becomes mainstream other open-source products like OpenOffice.org will become more acceptable
- spread of broadband makes it easier for users to download the product, access web-based support and participate in Community activities
- the cost of producing CDs is declining steadily enabling cheap distribution of OpenOffice.org
- the sheer quantity of code (7.5 million lines) in OpenOffice.org constitutes a formidable barrier to entry for new competitors
- web services may evolve to provide radically new ways of satisfying the user needs which are currently met by desktop office suites
- with the spread of broadband and the internet generally, users may find other ways to access office functionality (e.g. from a server via a browser)

## 1 **Economic Environment**

2 As office software becomes an increasingly mature market, price becomes  
3 increasingly important as customers treat the product as a commodity<sup>35</sup>

- 4 • the price of software is becoming an increasing percentage of the purchase price  
5 of new computers
- 6 • there is an embarrassment factor that two of the world's richest top ten  
7 individuals owe their wealth to Microsoft
- 8 • conventional software licence fees are unaffordable in many parts of the  
9 developing world
- 10 • the free licence simplifies the spread of OpenOffice.org across country, trading  
11 bloc, or tariff barriers
- 12 • Small/Medium Enterprises (SMEs) are an increasingly important sector in  
13 developed economies<sup>36</sup>
- 14 • Sun Microsystems may lose the ability or desire to fund non-revenue generating  
15 activities such as the Community

## 16 **Political and Legal Environment**

17 Increasing worries about the role of the US in the world and distrust of multinational  
18 corporations may be expected to help the spread of open-source software. The  
19 increasingly aggressive pursuit of IPR by large corporations is designed to cause  
20 FUD (Fear, Uncertainty, and Doubt) among potential open-source users and  
21 contributors, but equally may prove counterproductive as the awareness of open-  
22 source grows.

- 23 • 9/11 effect - companies and governments less liable to trust their computer  
24 systems and data to US corporations post Afghanistan and post Iraq
- 25 • open-source software allows developing countries to take greater control over  
26 their systems and not have to rely on the good intentions of a large, foreign  
27 company.
- 28 • open-source offers an opportunity for countries to grow computer skills among  
29 their own workforce
- 30 • environmental regulations are increasing pressure to prolong the life of computer  
31 equipment in markets like the EU
- 32 • steady trickle of bad publicity from EU and US court cases is tarnishing the  
33 reputation of Microsoft the monopolist
- 34 • licence violations, patents, and other IPR issues are being pursued with  
35 increasing severity
- 36 • there is believed to be a high volume of unlicensed software in use, even in  
37 'developed' markets (e.g. around 30% of business users in Australia<sup>37</sup>)
- 38 • the US Patent Office is granting patents to corporations who can afford to submit  
39 applications even if they blatantly fail the 'prior art' criteria<sup>38</sup>

# Strengths, Weaknesses, Opportunities, Threats

## SWOT Analysis

This section provides a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis, listing the

- *internal strengths* and **weaknesses** of the Community and OpenOffice.org; and
- **opportunities** and **threats** faced by OpenOffice.org due to the changes in the *external environment* (see *Review of the External Environment* on page 29)

### Strengths

The Community and OpenOffice.org benefit from the following internal resources and capabilities:

- OpenOffice.org is released under an open-source licence meaning it is free to acquire and distribute
- the licencing structure means OpenOffice.org can benefit from Community involvement
- backing from Sun Microsystems means there is a dedicated professional development team and other support for the Community and product
- the Community has an active and enthusiastic membership, especially in the native language projects
- OpenOffice.org's origins as a single product has created a tightly-integrated product suite
- OpenOffice.org has no competitor with comparable functionality in several platforms / languages
- the functionality provided by OpenOffice.org is comparable to the market-leading product
- OpenOffice.org has proved easy to translate into different languages
- OpenOffice.org uses open file formats natively within the product and is an active player in the OASIS standards work
- OpenOffice.org offers good file compatibility with other common office products

### Weaknesses

The Community needs to be wary of the following internal issues:

- the OpenOffice.org source code is released under an open-source licence meaning it can be incorporated into other products within the restrictions of the licence
- the dependence on Sun causes suspicion among some potential Community supporters in the open-source world
- the Community is immature in governance and organisation
- the Community has no self-generated finances
- lack of a professional management (especially project management) structure means that the enthusiasm of volunteers within the Community is not always harnessed effectively
- the size of the codebase makes it difficult for new hackers to master
- the OpenOffice.org brand name is confusing (it sounds like a website)
- OpenOffice.org does not include/lacks integration with other software (e.g. email, web browser)

- OpenOffice.org does not have macro or Basic compatibility with MS-Office which can hinder the migration of 'power users'
- some new functions in OpenOffice.org are being written in Java, requiring a Java Runtime Environment (JRE) on the user's PC
- the constraints of working cross-platform can make for a less than perfect 'fit' to individual platforms
- the generic cross-platform OpenOffice.org installer is not as easy to use as native platform installers
- OpenOffice.org lacks end user 'extras' such as hard copy manuals, templates, clipart, etc.
- OpenOffice.org does not come in an OEM pre-installation kit for PC suppliers
- OpenOffice.org does not have a visible local support structure which is often claimed to be essential for the SME market
- for many MS-Windows users, open-source is synonymous with Linux, meaning they do not realise OpenOffice.org is also available for their platform
- as a full-featured office suite, OpenOffice.org has a heavy 'footprint' (especially with a JRE), making it less suitable for the currently 'under-served' users who would be a natural target for disruptive technology marketing

## Opportunities

The following external factors provide opportunities for OpenOffice.org:

- the adoption of Linux is encouraging people to think more about open-source
- the open-source movement is showing healthy growth world wide
- there is a range of cross-platform, multi-lingual, open-source software available for potential bundling opportunities with OpenOffice.org (email clients, web browsers, databases, groupware, etc)
- the arrival of the Microsoft's XP range of products is forcing users onto another round of upgrades
- Microsoft's increasing efforts in licence enforcement encourage users to seek alternatives - especially users without valid licences
- the proliferation of viruses etc targeted at Microsoft software is encouraging users to look at alternatives
- PCs are now becoming widespread in countries where MS-Office licences are simply unaffordable<sup>39</sup>
- the lack of hard-copy manuals makes OpenOffice.org an attractive target for third-party technical authors

## Threats

The following external factors constitute potential threats to OpenOffice.org:

- the Community is highly dependent on Sun Microsystems who have not been noted for software in the past
- the presence of two products in the marketplace using the same codebase causes confusion (OpenOffice.org and StarOffice)
- the open-source licence regime means anyone can rebrand and redistribute the code under a new name
- the office productivity suite marketplace is totally dominated by Microsoft with its MS-Office range of products
- Microsoft can set de-facto industry standards in areas such as look and feel, file formats
- Microsoft can afford to target specific markets with low cost variants of MS-Office
- Microsoft can use its virtual monopoly of the desktop operating system market to facilitate other products such as MS-Office
- Microsoft's roadmap for MS-Office shows closer integration with other Microsoft products, making migration more difficult

- developments in patent legislation are creating a climate of 'FUD' around open-source
- users are expecting 'office suites' to include internet software - email, web browser, possibly calendaring

## SWOT Recommendations

### Introduction

Matching internal strengths and weaknesses to external threats and opportunities gives four classes of strategic recommendations for the Community:

	<b>Strengths</b>	<b>Weaknesses</b>
<b>Opportunities</b>	<b>O-S:</b> 'No brainers' where OpenOffice.org's internal strengths are a clear fit with external opportunities	<b>O-W:</b> Areas where OpenOffice.org needs to make special efforts to meet external opportunities
<b>Threats</b>	<b>T-S:</b> Areas where OpenOffice.org is well equipped to defend its market against external threats	<b>T-W:</b> Areas where OpenOffice.org's weaknesses make it more vulnerable to external threats.

### O-S recommendations

- OpenOffice.org should capitalise on its position as the only fully-functioned, integrated open-source office productivity suite in the Linux market
- the Community should build a centre of expertise in native-language deployment, creating a 'best practice' process which can be deployed for new languages
- the Project should plan promotional activities specifically targeted at users faced with an enforced upgrade from Microsoft. The message should stress the similarity of look and feel, ability to read MS-Office file formats, and additional benefits over MS-Office (e.g. tighter integration)
- the Project should plan promotional activities specifically targeted at users worried about being caught with 'pirate' copies of MS-Office. The message should stress the similarity of look and feel, ability to read MS-Office file formats, additional benefits over MS-Office (e.g. tighter integration), and the guaranteed open-source licence
- the Project is ideally placed to target 'current non-consumers' - a classic market for market disrupters

### O-W recommendations

- the Community should improve the packaging of OpenOffice.org to make it easier for MS-Windows users to migrate to OpenOffice.org than to upgrade to MS-Office XP
- the Project needs to communicate that OpenOffice.org is for MS-Windows users too
- OpenOffice.org needs to develop an OEM pre-installation kit for PC suppliers
- the Community should work with the open-source community to develop clip-art, templates, etc
- the Community should produce 'native' Linux versions (rpms, debs, etc)
- the Community should produce a 'Java free' version to reduce demands on the desktop and give greater acceptability to Linux distributions (until Java is open-sourced<sup>40</sup>)

- 1 • the Community should prioritise size reduction / performance enhancements (or  
2 possibly an 'OOoLite') for low specification PCs

### 3 **T-S recommendations**

- 4 • The Community should put significant effort into understanding Sun's goals for  
5 StarOffice and OpenOffice.org, and selling the benefits to Sun of their continuing  
6 support of the Community  
7 • The Community should supply community-developed translations etc for  
8 StarOffice  
9 • The Community should produce significant collateral to demonstrate and aid  
10 ease of migration for MS-Office users  
11 • The Community should respond to Microsoft 'bargain basement' variants of MS-  
12 Office by stressing the full-function/open-source attributes of OpenOffice.org

### 13 **T-W recommendations**

- 14 • The Community should seek to strengthen its governance and management so it  
15 is capable of becoming self-sufficient  
16 • The Community should work to build understanding of the codebase in the open-  
17 source development community  
18 • The Project needs to maintain clear documentation on the StarOffice vs  
19 OpenOffice.org questions  
20 • The Community needs to broaden the functionality of OpenOffice.org to include  
21 email, web browsing, etc

# Goals and Objectives

## Usage Goals

### Target 2010

The Community's goal is that OpenOffice.org becomes the product of choice for users of office software, on any major platform in any language. However, it is recognised that office suites are a mature product, and so users with a product currently installed on their PCs will probably be quite comfortable with it.

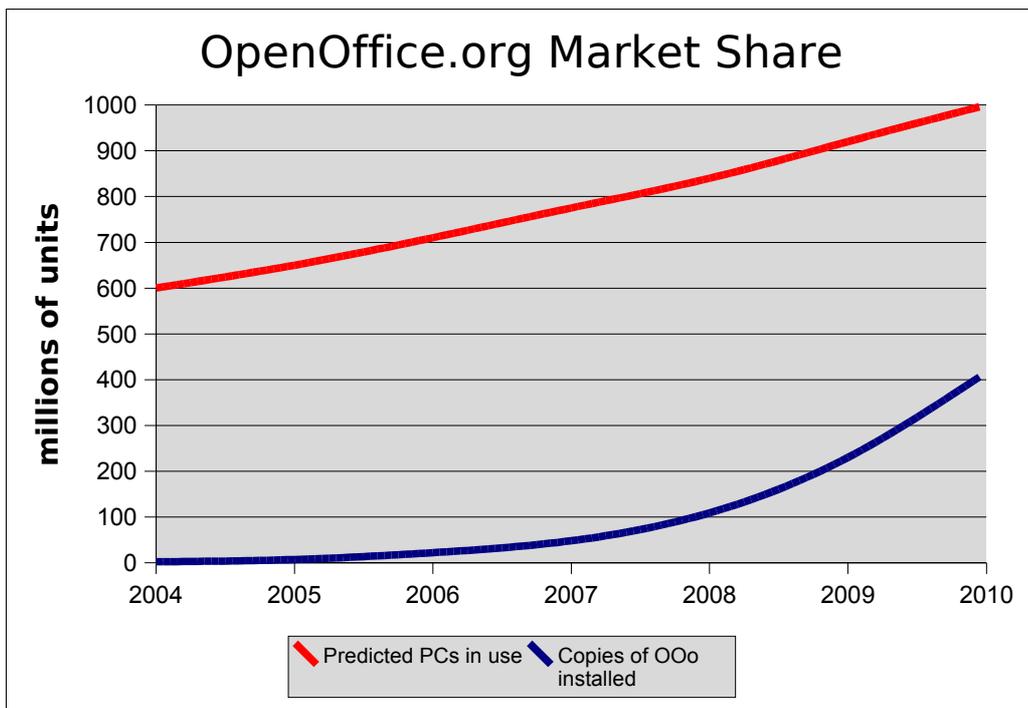
The decision to choose OpenOffice.org is most likely to be exercised at specific 'trigger points' in users' decision-making:

- users who have not yet selected/installed an office suite (including those acquiring a new PC) and realise they have a need for one
- users of single function applications looking for additional functionality (e.g. word processor users who find they also need a spreadsheet)
- users who have unlicensed ('pirate') editions of commercial software
- users who are facing an enforced 'end-of-life' upgrade for their current product

The Community's goal is for OpenOffice to be the product of choice at these trigger points, reaching a 50% selection rate by 2010:

Year	2003	2004	2005	2006	2007	2008	2009	2010
Rate	1%	2%	5%	10%	20%	30%	35%	50%

Today, there are estimated to be around 600 million PCs in use; by 2010, the number could be over 1,000 million<sup>41</sup>; Based on these figures and a 50% selection rate by 2010, OpenOffice.org's target is to be installed on over 400 million desktops by the end of 2010, a market share of over 40%:



## Measuring Progress

Unlike commercial organisations, OpenOffice.org cannot measure sales directly. The variety of distribution channels (see *Distribution* on page 10) means that an accurate count of installations is also impractical - for example, an increasingly successful policy of encouraging mirroring will reduce the number of downloads measured from the OpenOffice.org site. With an open-source policy, it is also impossible to enforce compulsory user registration (even if that was deemed desirable by the Community).

Currently, the Community *Statistics Project* is maintaining what statistics it can for downloads, registrations, etc. It is hoped that with time trends can be spotted and conclusions drawn. Possibly the Project may be in a position to commission research by the end of the Plan period.

However, if the Community's usage goals are being met, OpenOffice.org should be featured increasingly in independent surveys of the office suite market, press coverage, etc. There are some examples of this already in North American studies: the SME Market (6% market share July 2003)<sup>42</sup>, and the large business market (8% March 2004)<sup>43</sup>.

## Marketing Objectives

In order to reach the usage goals, the Project believes the following marketing objectives must be achieved:

- OpenOffice.org must have achieved global brand awareness
- OpenOffice.org must be available for any desktop platform with more than a 10% global market share
- OpenOffice.org must be available in every language used by more than 10% of computer users
- OpenOffice.org must be available to 90% of computer users for less than one hour's local average wages
- OpenOffice.org must be a component of every general purpose Linux distribution

In terms of the product acceptance curve, OpenOffice.org users currently fall between the innovators and early adopters.

By 2010, OpenOffice.org must have broken through into the majority users in order to meet its overall sales targets.

Correctly identifying the maturity of a target market is important if promotion activities are to be successful.

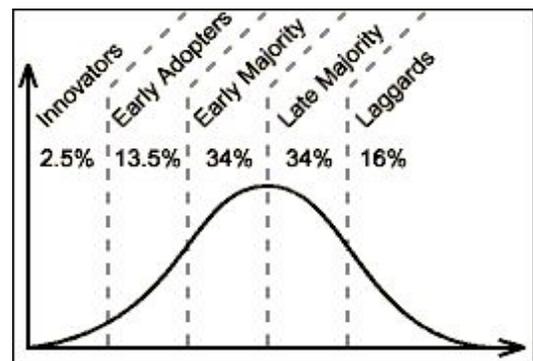


Figure 1 Product Acceptance

## Marketing Project

The detailed strategic proposals to achieve these objectives are given below. Responsibility for implementing the proposals will be with the various members of the Project as below:

## Project Leads

Own the process for creating and maintaining the Strategic Marketing Plan. Responsible for issuing central press releases; maintaining the Project pages on the OpenOffice.org website and the central library of collateral (English language); recruitment of and liaison with MarCons; recruitment of and liaison with Observers to work on central resources; liaison with other Community projects and the Community Council.

## Marketing Contacts (MarCons)

Responsible for participating in creating central resources and then adapting them to their own geographies/markets - translations, local market intelligence and promotion; distribution channels to their geography/market; named contacts for local/specialist press enquiries about OpenOffice.org, the Project, or the Community in any press releases; feedback local market information to the Project Leads; liaison with any Native Language projects key to their areas.

### What do MarCons do?

A MarCon:

- is available and responds readily to individuals and organisations that contact them with regard to OpenOffice.org.
- liaises with the Marketing Project Leads in representing, and coordinating relationships with OpenOffice.org.
- conducts research and is aware of OpenOffice.org marketing opportunities in their area, e.g. potential users, conferences for OpenOffice.org to attend etc.
- distributes OpenOffice.org press releases if applicable to their region.
- conducts presentations and seminars if requested.
- shares ideas, thoughts, plans, what has worked and not worked with OpenOffice.org.
- uses the OpenOffice.org Marketing Project as a resource and requests assistance and ideas to assist them to market OpenOffice.org in their region.
- joins the Marketing Project and offers their specialist skills to contribute to the goals and activities of the Project.
- subscribes to or monitors [dev@marketing.openoffice.org](mailto:dev@marketing.openoffice.org) and [com@native-lang.openoffice.org](mailto:com@native-lang.openoffice.org).

The relationship between the MarCons and the Project Leads is illustrated in Figure 2 below, which shows how both parties co-operate in producing a Strategic Marketing Plan (this document) which forms the starting point for a Market Plan for the target market.

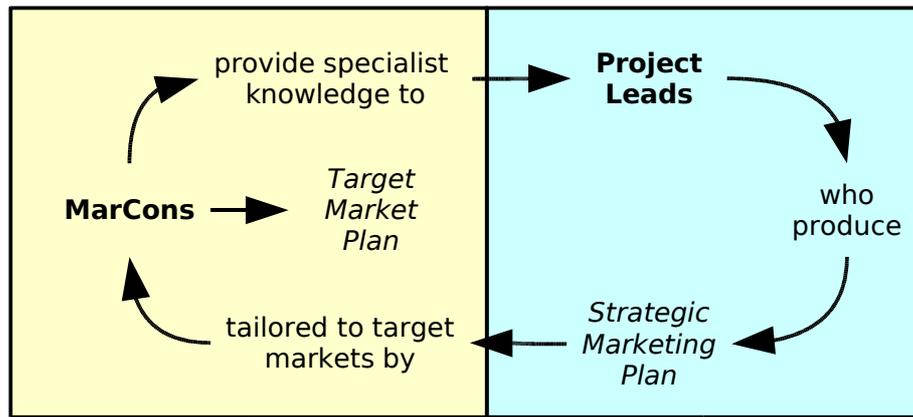


Figure 2 MarCons and Project Leads

Applying this process to the creation of central resources such as promotional materials prevents duplication of work and ensures a consistency of message.

### Marketing Project Observers

The title 'Observer' comes from the name of a role in the SourceCast software used by the Community's web site. 'Observers' do much more than 'observe' - they are full participants in all Marketing discussion groups and on-line activities and are the front line troops in Project activities.

Specific responsibilities: providing specialist skills (market research, competitor intelligence, graphics, copywriting, translating...); working either on central (Project Lead) or local (MarCon) marketing activities; fundamental resource for the promotion of OpenOffice.org.

# Strategic Proposals

## Community

### Governance

This Plan is concerned primarily with the Marketing activities of the Community. However, the Project believes that the Community will not be capable of delivering many of these proposals without significantly improving its overall governance, starting from the Community Council. For example, the proposals concerning the website require cross-project (and possibly cross Sun/Community) decision making capability. This level of organisational maturity has yet to emerge from the generally chaotic 'indecision by mailing list' process that Community members are familiar with just now.

Delivering the Plan requires an effective governance body such as the Community Council to be in place by the end of 2004.

## Product

### Brand name

Revisit the OpenOffice.org brand name and relationship to rebranded COTS variants StarOffice, Novell Office, AOL Office, etc 1.1

Encourage all producers of software using the OpenOffice.org codebase to display 'OpenOffice.org inside' style branding. 1.2

If any of these producers have strong brands of their own, leverage these to reinforce OpenOffice.org (especially in the early years of the Plan) 1.3

### Brand values

Develop brand values: 1.4

- Availability (value for money, multi-lingual, multi-platform, open file format)
- Quality (stable, reliable, well-established, virus resistant)
- Friendly (familiar user interface, legacy file compatibility, community based)

### Quality

Work closely with the QA project to prioritise / ensure valid bugs are squashed and report as a 'good news' item 1.5

### Product Development

Set strategic direction for what *the leading office suite* should contain by 2010, and investigate OpenOffice.org variants (e.g. *OOo Professional*) 1.6

Look at adding complementary components to OpenOffice.org through interworking with complementary open-source products which share our brand values for: 1.7

- database
- email
- calendaring

The Community should work with the open-source community to develop clip-art, templates, etc 1.8

the Community should prioritise size reduction / performance enhancements (or possibly an 'OOoLite') for low specification PCs 1.9

Take direction of the requests for enhancements and turn into a coherent short term product development plan with the developers. 1.10

### **Support**

Publicise the work of the various support communities 1.11

Rationalise the mass of user documents, HOW-TOs, etc scattered around the OOo site 1.12

### **Packaging**

The Community should build a centre of expertise in native-language deployment, creating a 'best practice' process which can be deployed for new languages 1.13

The Community should improve the packaging of OpenOffice.org to make it easier for MS-Windows users to migrate to OpenOffice.org than to upgrade to MS-Office XP 1.14

Create an automated installed kit for OEMs (OPK - OEM Pre-installation Kit) 1.15

Installation process should be more tailored to particular platforms, e.g. self-installers for MS-Windows; 'native' Linux versions (rpms, debs, etc) 1.16

The Community should produce a 'Java free' version to reduce demands on the desktop and give greater acceptability to Linux distributions (until Java is open-sourced) 1.17

## **Price**

The Project must produce convincing materials to explain the open-source value proposition: "if this product is so good, how/why are you giving it away free?" 2.1

Standards should be set for CD pricing by approved distributors (see *CD-ROM distributors* on page 41) 2.2

Develop the concept that the price of OpenOffice.org is contributing back to the Community (part of the Marketing Strategy for the Community). 2.3

## **Distribution (Place)**

Explore the logistics of giving something away - which can be just as complex as the logistics of a 'paid for' product. The Project has to consider the full lifecycle of: 3.1

- getting the installation media to the end user
- installation on the PC
- putting the user in touch with whatever community resources are required to ensure OpenOffice.org delivers the expected benefits to the user.

## Virtual distribution

### ***OpenOffice.org website***

The OpenOffice.org website is the key to the distribution process, not only hosting the master downloads, but also signposting the other distribution channels.

The downloads section must be as simple to find and use as possible: the model is an Amazon-style 'one click download' for all users in their language / platform of choice. 3.2

### ***Mirrors***

The Project must encourage as many high-quality mirrors as possible, including emerging peer-to-peer networks like BitTorrent 3.3

## Physical Media

### ***CD-ROM distributors***

Through MarCons, the Project should sign up CD distributors in all major geographies, especially those where broadband is not available. 3.4

The Project should be prepared to endorse distributors who sign up to certain minimum standards (pricing, quality) and offer free links from the OpenOffice.org website in exchange. 3.5

OpenOffice.org branded software has also been included in commercial office 'bundles'<sup>44</sup>. While welcome, these are less desirable from a Project perspective as they are more expensive, and dilute the OpenOffice.org branding.

### ***CD-ROM giveaways (magazines, etc)***

MarCons should identify the main 'cover disk' magazines in major geographies, keeping records of the magazines' coverage of OpenOffice.org, and work with them in advance of every product launch to ensure full coverage of the new release. 3.6

The Project should build a library of 'Starting with OpenOffice.org' articles that can be offered to magazines to form the basis of articles to accompany cover disks. 3.7

### ***Public Lending Libraries***

MarCons should work to ensure OpenOffice.org is available in every public lending library where these exist in their territory<sup>45</sup>. 3.8

## OEMs

### ***Linux distributions***

MarCon(s) should be appointed for the Linux market and work to ensure OpenOffice.org is included with all mainstream Linux distros (specialist 'minimal Linux' distros are aiming for a different market). 3.9

### ***Pre-installed software on new PCs***

The pre-installed market is key to adoption by home users. OpenOffice.org should target to sign up at least one 'big name' brand by 2005, and a further brand by 2010. 3.10

(see also the OPK action under *Packaging* on page 40)

## Promotion

### Message

As the OpenOffice.org community does not have funding, funded promotion currently is limited to 'piggy-backing' on Sun's promotional activities for StarOffice plus whatever free promotional activity the community can come up with. The main challenge here for the Project is to make the best use of the resources it has, and to come up with an integrated approach, with all activities supporting the brand values following the same rules and spreading the same message.

The Project must agree the brand values with the Community Council and communicate them tirelessly to the Community 4.1

The Project should target 'current non-consumers' - a classic market for market disrupters 4.2

OpenOffice.org should capitalise on its position as the only fully-functioned, integrated open-source office productivity suite in the Linux market 4.3

The Project needs to communicate that OpenOffice.org is for MS-Windows users too 4.4

The Project should respond to Microsoft 'bargain basement' variants of MS-Office by stressing the full-function/open-source attributes of OpenOffice.org 4.5

The Project should plan promotional activities specifically targeted at users faced with an enforced upgrade from Microsoft. The message should stress the similarity of look and feel, ability to read MS-Office file formats, and additional benefits over MS-Office (e.g. tighter integration) 4.6

The Project should plan promotional activities specifically targeted at users worried about being caught with 'pirate' copies of MS-Office. The message should stress the similarity of look and feel, ability to read MS-Office file formats, additional benefits over MS-Office (e.g. tighter integration), and the guaranteed open-source licence 4.7

### OpenOffice.org Website

The OpenOffice.org site is currently hosted by Collabnet using the SourceCast content management system. The funding for the site is provided by Sun, including hosting, bandwidth for downloads, etc. SourceCast is designed specifically to support remote collaboration on open-source projects, on similar lines to SourceForge<sup>46</sup>.

### Internal Project Users

Various projects - including the Marketing Project - use the project tools provided by SourceCast for discussion groups, file repositories, etc. In this case, the site is serving internal project users, and the content generally fits well within templates provided by SourceCast

## Shop Window

However, [www.OpenOffice.org](http://www.OpenOffice.org) is not just a site for internal users. It is also OpenOffice.org's main shop window to the world, for telling potential users about the product and the Community, how to acquire, install, and use the product, where to go for support, and how to become an active member of the Community. Without an external advertising budget, this is the advertising resource for the Project (see *Advertising* on page 44).

SourceCast is not as well suited for this general hosting activity, as the CMS templates restrict the look and feel of the site, and CollabNet also forbid the use of scripting languages such as *php*<sup>47</sup> to generate dynamic content.

## Recommendations

The 'Shop Window' element of the website is a key resource for the Project's promotional activity. This Plan recommends that:

- <http://www.openoffice.org> should host the *shop window* pages free from the restrictions of SourceCast. The content of the pages should be owned by the Marketing Project, with the mechanics provided by the Website Project. 4.8
- NL-projects would be encouraged to have their own *NL shop-windows* in this same area 4.9
- the *internal project pages* are generally well served by SourceCast, but should be moved to a new 'root' URI such as <http://community.openoffice.org>. Individual projects would have URIs as now (e.g. <http://marketing.openoffice.org>) 4.10

## Marketing Project

The Marketing Project pages should host as now the activities of the Project, plus the English language masters of all the Project collateral (see *Product Marketing Material* on page 45). 4.11

NL-projects would be encouraged to maintain translations of the Project collateral in their own project pages. 4.12

## Public Relations and Publicity

This is the main focus of the Promotion activity of the Project, as unlike paid-for advertising it does not require funding. The most important principle is to ensure that everything the press sees or hears is managed and is consistent.

It is therefore recommended that only Project Leads or MarCons actually communicate with the press. This includes all areas of PR, such as corporate announcements, defensive PR, and marketing PR. 4.13

### PR Tools

- news releases
- feature stories and interviews
- exclusives
- opinion pieces
- photos
- speeches or appearances at seminars, conventions, etc.

- local, regional or national talk shows and other programmes
- online chats and forums
- community involvement
- lobbying activities
- social responsibility activities

All press releases should contain the three key elements:

- a message related to OpenOffice.org's features and benefits
- a hook to make it newsworthy and interesting
- a link to drive people to the OpenOffice.org web site

### **Proposed tactics for OpenOffice.org PR activities**

- Prior to a product release, encourage the press to download late beta snapshots
- Find a good spokesperson to help promote OpenOffice.org
- Always ensure that the OpenOffice.org website is featured in the release
- Include the geek press, trade press and consumer press
- Make sure there is some genuine 'news'
- Schedule press releases so that various media sources publish information that builds on itself and progressively includes new tidbits of information
- Develop an interesting and fun idea centered around a release or upgrade - e.g. the naming of new releases
- Offer co-sponsorships for media to OOoCon

## **Direct Marketing**

For budget reasons, the only channel available to the Project for direct marketing is email, which in these days of global spam is a highly sensitive area. However, though the voluntary registration process there is a channel for building an 'opt-in' email address database.

It is proposed that this should be used primarily for: 4.14

- 'pass it on' - spreading OpenOffice.org usage from innovators to early adopters etc (see *Figure 1 Product Acceptance* on page 36)
- encouraging uptake of new releases
- encouraging users to become Community members
- encouraging users to attend OpenOffice.org conferences

## **Advertising**

Without a budget, the main advertising platform for the Project is the OpenOffice.org website. All other promotional activity should be aimed at maximising the exposure of the website. However, it is important that the Project maintains other materials such as web banners, product flyers and posters, product packaging and inserts which can be used if an opportunity arises (see *Product Marketing Material* on page 45 for details of specific actions).

1 The Project's advertising promise for OpenOffice.org is that the software will meet  
2 all a user's needs for office software. and the Community will always be there for  
3 them. The tone of the advertising is always positive, emphasising that one day all  
4 software will be written like this. As OpenOffice.org moves into the mainstream (see  
5 *Figure 1 Product Acceptance* on page 36) the tone will need to change from  
6 appealing to innovators to reassuring the mainstream.

## 7 **Promotions**

8 Promotions in marketing jargon are 'incentives to act', for encouraging potential  
9 consumers to try the product, or to encourage loyal customers to increase their  
10 consumption. Clearly, some of the mainstays of commercial promotions such as  
11 bulk buys ('buy one get one free') or coupons ('5 euro off with this coupon') simply  
12 don't work in the context of OpenOffice.org.

13 However, there are other promotion opportunities. For example, giving away  
14 OpenOffice.org CDs at freshers' fairs at colleges and universities - or better still,  
15 arranging for the college to give away the software as part of the student induction.

## 16 **Conferences**

### 17 **OOoCon**

18 Conferences require a lot of planning, resources (money and people), and can flop  
19 without proper targeting, but they are a recognised part of the open-source process  
20 and a means for the cognoscenti to judge the health of a project. Fortunately, Sun  
21 recognise the importance of the annual OpenOffice.org Conference (OOoCon) and  
22 facilitate it with financial and other resources.

Project leads should take responsibility for the success of OOoCon, either by 4.15  
personal involvement or by appointing a conference organiser (for  
responsibilities see box below)

#### 23 **Project responsibilities for a successful OOoCon**

- 24 • key responsibility - *making sure there is a compelling reason for people to*  
25 *attend*
- 26 • making sure there is something newsworthy (PR)
- 27 • making sure OOoCon addresses specific marketing objectives

### 28 **Third Party Conferences**

29 Budget is a problem here again - however, MarCons should be aware of activities  
30 going on in their area where they might be able to put OpenOffice.org forward. For  
31 example, volunteering to speak at software conferences, professional associations,  
32 etc.

MarCons should actively recruit, support, and keep a register of volunteer 4.16  
speakers for meetings, etc

33 Visual aids and presentation material should form part of the Project Library (see  
34 *Marketing Project Library* on page 46)

## 35 **Product Marketing Material**

36 Supporting product literature and other Community collateral materials is key to  
37 many of the Project's efforts. These items must present the OpenOffice.org image  
38 and message very clearly and professionally. Not only is the text and wording of the  
39 literature important, but also the visual image and quality that it projects.

### Items that should be held in a central Marketing Project Library

- Graphics: logos, web banners, CD-ROM labels and jewel case inserts, 'built with OpenOffice.org' images, posters
- White Papers: Product Flyers aimed at various audiences; Release Notes
- Screenshots: various platforms, languages
- Impress presentations about OpenOffice.org
- Case Studies: for each target market
- Reviews: links to (favourable!) reviews in 'quality' on-line sources, especially those outwith the open-source 'usual suspects'
- Press Pack: a convenient bundle for time-starved journalists
- Premium Items: artwork for mugs, T-Shirts, pens, carrier bags, etc

In literature, it is critical to highlight and emphasize the benefits of OpenOffice.org and not just the specifications and features. Each piece should consider these issues:

- What will the literature be used for (e.g. background on open-source / overall Community information / OpenOffice.org features and benefits / reasons to join the Community / etc.)?
- Who is the audience for each piece (e.g. current or potential Community members / current or potential users / end users or decision makers for groups of users / etc.)?
- What is the state of maturity of that particular market (see Figure 1 *Product Acceptance on page 36*)?
- Who will develop the piece? what brief will they be given by the Project Leads and MarCons?
- What is the copyright position of the artifact?
- When will the piece become obsolete? what does it replace?

The Project Leads will be responsible for:

- commissioning artifacts from the artwork project, individual contributors, etc 4.17
- QA'ing submissions and maintaining these in a central library 4.18

MarCons can either use these 'as is' or customise for individual markets.

### Premium Items

Premium items are the freebies given away at trade shows or other events. Again, as there is no budget available for these:

Project Leads should commission the artwork for producing mugs, T-Shirts, baseball caps, pens, carrier bags, etc from the artwork project, and maintain it on the project site in the hopes that local finance will be available for specific events. 4.19

## Marketing Project Members

The roles of the various members of the Project are outlined elsewhere (see *Marketing Project* on page 36). However, it cannot be stressed enough that the success of the promotional activity of the Project will depend on the enthusiasm and commitment of Project members, and their understanding of the Strategic Marketing Plan and the OpenOffice.org proposition.

The number one priority of the Marketing Leads should be the health of the Project. No opportunity should be missed for encouraging participation in Project activities.

Project Leads should set up a mechanism for tracking this state of health, e.g. 4.20 by recording the number of project members, the number of active participants in discussions, etc.

## Technical Authors

Project members should encourage authors to produce works about OpenOffice.org 4.21

("I really liked your *Dummies Guide to xxx* - have you ever thought about doing one for OpenOffice.org?"):

- seeing books about OpenOffice.org helps spread the brand name
- books generate reviews - further media exposure for the brand name
- users who won't use software without hard copy user manuals can be steered to third party books

The fact that OpenOffice.org doesn't have paper manuals makes it more attractive to third party authors.

Project Leads should be able to supply statistics about the number of users (i.e. potential readers). 4.22

## Complementary Products

OpenOffice.org is designed to be easy to call from other applications and uses open file formats. This should make it an obvious partner for other software (especially but not exclusively open-source). For example, the GRAMPS Genealogy software can export reports in Writer format.

## End Users

Finally, it must never be forgotten that satisfied users can be the best ambassadors for OpenOffice.org. People like giving presents, and the Project can encourage this behaviour with appropriate messages<sup>48</sup>:

### "Giving is good" messages

- We want you to share this with your friends, relative, schools, libraries, charities, government representatives
- Who have you shared this with today?
- I'm not buying, I'm sharing
- What languages do you share in?
- Give a little, get a lot
- It's all for you, and your friends too



# Appendix - Building the Plan

## Plan for the Plan

This version of the Plan - 0.5 - was prepared for presentation to OOoCon 2004. The 0.5 signifies that it is intended to be roughly halfway along the road to completion, both in terms of timescale and degree of acceptance by the Community.

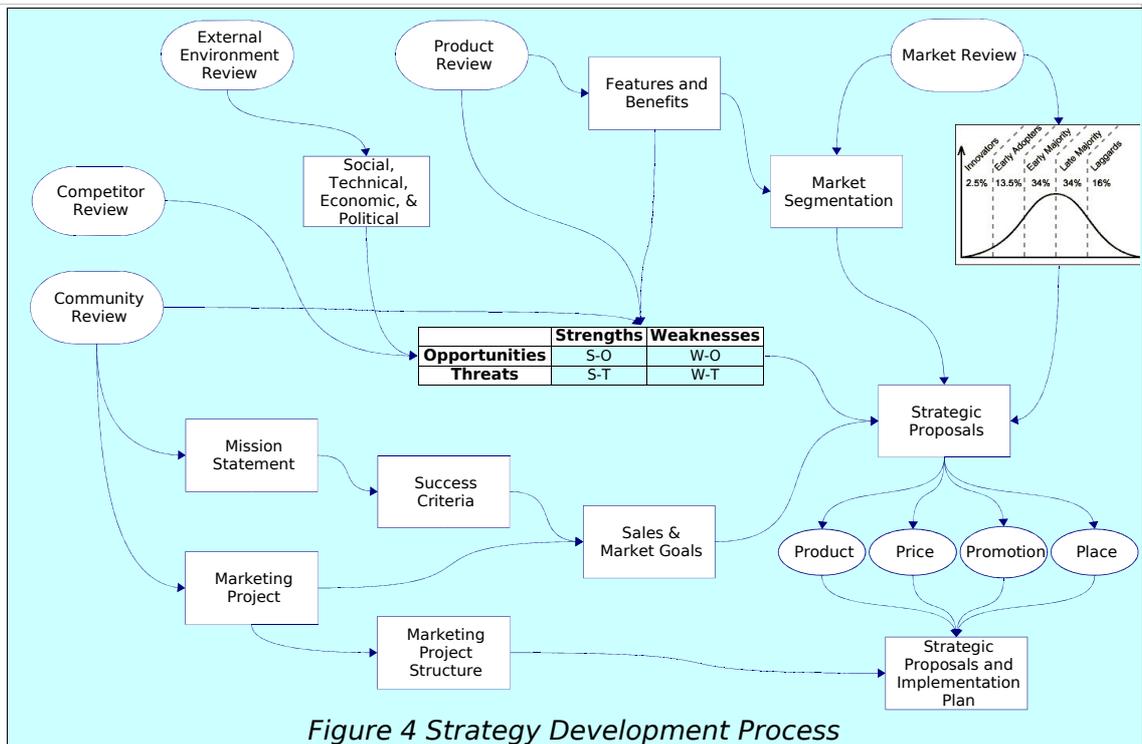
Figure 3 *Plan for the Plan* below illustrates that the majority of the work to this point has concentrated on developing the strategy through debate and brainstorming sessions, mostly among the MarCons. Once broad agreement is reached that the strategy is correct, then the detailed work begins of turning the action points into a project plan with priorities, owners, and timescales. This work will start with strategy workshops at OOoCon 2004 and will continue through debate in the Project mailing lists.



The intention is that this work will be complete ready for version 1.0 of the Plan to be formally adopted by the Community Council by the end of 2004. The work will continue to be driven by the Project Leads, with the active assistance of the whole Community - especially those who are members of the Project.

## Strategy Development

Figure 4 *Strategy Development Process* below illustrates the strands of work which have gone into this Plan, and how the various sections link together. It is intended as a roadmap for anyone wishing to take part in the ongoing strategic development work.



## 1 Contributors

2 This version of the Plan was developed using the MarCon discussion list and  
 3 compiled by John McCreesh. Thanks to all the MarCons; special thanks to: Christian  
 4 Einfeld, Colin Charles, Sophie Gautier, Ian Lynch, Bob Kerr, Jacqueline McNally,  
 5 Sankarshan Mukhopadhyay, Charles Schulz, Ryan Singer, Louis Suarez-Potts, Stefan  
 6 Taxhet, and apologies to those whose names have been accidentally omitted from  
 7 this list.

## 8 Copyright

9 This document is copyright ©2004 by John McCreesh [jpmcc@openoffice.org](mailto:jpmcc@openoffice.org) for and  
 10 on behalf of the OpenOffice.org Marketing Project. All rights reserved.

11 It is intended to release a future version of this document under an appropriate  
 12 open-source licence.

## 13 Version History

<b>No</b>	<b>Date</b>	<b>Notes</b>
0.1	11-Jul-04	Issued to Jacqueline for initial comments
0.2	06-Aug-04	Revised after first two MarCon brainstorm
0.3	22-Aug-04	Further revisions and second issue to Jacqueline
0.4	11-Sep-04	Gold release pre-OOoCon 2004
0.5	17-Sep-04	OOoCon 2004 - first public release

# 1 Alphabetical Index

1-2-3	15	MarCons	
<b>A</b>		And PR	42
Ability Office	15	Role	36
Access	13	Market Segmentation	17
Advertising	43	Market Share	
AOL Office	7	Measuring	35
Approach	15	Target	3, 34
<b>B</b>		Marketing Project	
BitTorrent	40	Members	46
<b>C</b>		Product Development	4
Case Studies	45	Website	42
CD-ROM		Microsoft	12
Distributors	40	Microsoft Office	
Magazine covers	40	Competitive Position	14
CD-ROMs	40	Goals	13
Codebase		Marketing	13
Building community support	33	Pricing	13
Hacking	30	Sales revenues	12
Lines of code	2	Mirrors	40
Market share	3	Mission statement	<b>2</b>
Other products	7, 38	MySQL	3
CollabNet	42	<b>N</b>	
Community Council	36, 38, 41, 47	NL-Projects	3, 30, 36
<b>D</b>		Novell Office	7
Debian	7	<b>O</b>	
Direct Marketing	43	OEMs	40
Distribution	9	Office Suites	
<b>E</b>		Entry Level	5
Excel	13	Full Function	6
<b>F</b>		Internet based	16
Fedora	7	Internet enabled	6
Freelance Graphics	15	Professional	6
<b>H</b>		Server based	15
Hancom Office	15	OOoCon	44
<b>J</b>		OOoLite	33, 39
Java		OPK	26, 31p., 39
Java-free OpenOffice.org	32, 39	Organizer	15
Linux distributions	27	Outlook	13
Open-source developers	7	<b>P</b>	
OpenOffice.org dependency on	31	Paradox	14
Runtime Environment	9	PowerPoint	13
<b>L</b>		Premium items	<b>45</b>
Libraries, public lending	40	Presentations	14
Linux		Press Pack	45
Distributions	9	Project Leads	36
Kernel	3	Promotions	44
Office suites	32	Public Relations	42
Target market for Openoffice.org	27	Publisher	13
Lycoris Office	7	<b>Q</b>	
<b>M</b>		Quattro Pro	14
		<b>R</b>	
		Red Hat	3
		Reviews	45

<b>S</b>		<b>T</b>	
Screenshots	45	Technical Authors	46
SmartSuite	15	<b>V</b>	
SourceCast	42	ViaVoice	15
StarDivision	2	<b>W</b>	
StarOffice		Website	
History	2	Hosting	41
In Education	20	Ownership	42
Target Market	17	Word	13
Vs OpenOffice.org	6	Word Pro	15
Statistics Project	35	WordPerfect	14
STEP Factors	28	<b>X</b>	
Success Criteria	2	Ximian	7
Sun		XML	
Acquisition of StarDivision	2	Benefits of	10
Backing for the Community	30	In Mission Statement	2
Collabnet	41	MS-Office support for	13
Educational licencing	20	WordPerfect support for	14
Network PCs	15	<b>Z</b>	
Promotional activities for StarOffice	41	Zend Technologies	3
Support for OOoCon	44		
SWOT Analysis	30		

## References

1. [http://www.openoffice.org/about\\_us/milestones.html](http://www.openoffice.org/about_us/milestones.html)
2. OpenOffice.org uses a dual licence strategy for the source code: the GNU General Public licence and the Sun Industry Standards Source licence. See <http://www.openoffice.org/license.html>
3. See for example *What is Open Source* on <http://www.oss-institute.org/>
4. There is a good explanation of this and UNO technology at IBM's DeveloperWorks site: <http://www.ibm.com/developerworks/library/co-uno.html>
5. [http://www.oasis-open.org/committees/tc\\_home.php?wg\\_abbrev=office](http://www.oasis-open.org/committees/tc_home.php?wg_abbrev=office)
6. For example MySQL AB, developers of the popular open-source database MySQL: <http://www.mysql.com/company/>
7. Andrew Morton speaking at a meeting sponsored by the Forum on Technology and Innovation in July 2004 - [http://gcn.com/vol1\\_no1/daily-updates/26641-1.html](http://gcn.com/vol1_no1/daily-updates/26641-1.html)
8. Monitored by the *Statistics Project* at <http://stats.openoffice.org/>
9. unpublished paper from Erwin Tenhumberg  
[soo\\_ooo\\_market\\_share\\_analysis\\_draft\\_21july2004.sxw](http://www.openoffice.org/soo_ooo_market_share_analysis_draft_21july2004.sxw)
10. Reported in [http://www.itworld.com/nl/lnx\\_desktop/05302002/](http://www.itworld.com/nl/lnx_desktop/05302002/)
11. For example the comparison of Office suites in ZDNet UK June 2004  
<http://reviews.zdnet.co.uk/software/productivity/0,39024195,39158410,00.htm>
12. e.g. Logotron's *SchoolOffice* (education sector) - <http://www.logo.com/cat/view/school-office.html>
13. e.g. *KaiOffice* (Chinese) - <http://www.kaisource.com/kaioffice68en/index.html>
14. e.g. *SotOffice* (LBA-Linux)- <http://www.sotlinux.org/en/sotoffice/index.php> and NeoOffice (MacOS) <http://www.neooffice.org>
15. *The ooo-build parallel fork is a good thing: it brings the notoriously unapproachable OpenOffice.org development process closer to what the rest of the community expects to deal with* - Linux Weekly News Aug 19,2004 - <http://lwn.net/Articles/97549/bigpage>
16. *The Innovator's Solution*, Christensen and Raynor <http://theinnovatorssolution.com>
17. e.g. *OpenOffice.org is one of the main pretenders to the Microsoft Office throne, one of the few that can measure up to one of the most formidable office suites in the world* - <http://www.itreviews.co.uk/software/s236.htm>
18. Typical estimates give MS-Windows 95%, Mac OS 3%, GNU/Linux 2%
19. *...Microsoft increasingly offers licenses to the larger key accounts at very attractive cut prices to beat the competition*  
[http://www.researchandmarkets.com/reportinfo.asp?report\\_id=222210&t=o&cat\\_id=4](http://www.researchandmarkets.com/reportinfo.asp?report_id=222210&t=o&cat_id=4)
20. *Microsoft has been reprimanded over misleading advertising by the Advertising Standards Authority (ASA). The UK watchdog upheld complaints about a magazine advert which claimed that the open-source operating system Linux was more expensive than Windows.*  
<http://news.bbc.co.uk/1/hi/technology/3600724.stm>
21. *Microsoft: Linux is a threat, it may mean prices cuts and less business for us* Jo Best, Silicon.com 03-Sep-04  
<http://software.silicon.com/os/0,39024651,39123685,00.htm?nl=d20040906>
22. *Microsoft Pushes Translating Its Programs into Developing Nations' Languages* - Seattle Times July 2004  
[http://www.newsgleaner.com/site/news.cfm?newsid=12315035&BRD=2340&PAG=740&dept\\_id=226964&rfi=6](http://www.newsgleaner.com/site/news.cfm?newsid=12315035&BRD=2340&PAG=740&dept_id=226964&rfi=6)
23. *Microsoft has slashed prices on Windows XP and Office to join the Thai government's 'people's PC' project* CNet Asia June 2003  
<http://asia.cnet.com/newstech/systems/0,39001153,39136847,00.htm>
24. e.g. the now discontinued Javastation product
25. IBM's new software is designed to be distributed and accessed through a Web server - TechRepublic May 2004 <http://techrepublic.com.com/5100-6265-5209067.html>
26. IBM Developerworks, June 2004 - <http://www-106.ibm.com/developerworks/lotus/library/article/lwp20-features/>
27. For example Anyware Office - <http://www.anywareoffice.com>
28. <http://www.sun.com/products-n-solutions/edu/solutions/staroffice.html#Education>
29. *Open Source Lending CDs in Libraries: Howto*, Bob Kerr, 2003  
<http://www.openoffice.org/nonav/issues/showattachment.cgi/11838/Open%20Source%20CD%20in%20libraries%20Howto.pdf>

## References

30. *Circuit Riders: A technology support solution for the voluntary sector*  
<http://www.lasa.org.uk/cgi-bin/publisher/display.cgi?1358-7102-93792+computanews>
31. Open source in the small and medium business sector, Gavin Dudley, September 2004 -  
[http://www.tectonic.co.za/view\\_feature.php?viewid=2](http://www.tectonic.co.za/view_feature.php?viewid=2)
32. *Microsoft broken up* - BBC Business News Wednesday, 7 June, 2000  
<http://news.bbc.co.uk/1/hi/business/781852.stm>
33. See for example <http://www.quickmba.com/strategy/PEST Analysis.htm>
34. *You can see that in places like China where they have this huge software market - \$35bn in the next couple of years, according to IDC. They are endorsing Linux and paying stipends to the corporations there to use Linux, in an effort to try and keep the software business inside China.* Carol Stafford, IBM worldwide vice president of Linux sales, July 2004.  
<http://www.vnunet.com/analysis/1156787>
35. See for example Nicholas Carr's now infamous Harvard Business Review article *IT Doesn't Matter* in May 2003 <http://www.nicholasgcarr.com/articles/matter.html>
36. e.g. *Within Australia the small business sector comprises around 97 percent of all private sector businesses and employs 49 percent of the total work force or some 3.3 million people.*  
<http://www.sbdc.com.au/documents/5.3/BECreview2003CommunitiesofEnterprise.pdf>
37. Estimates from the Washington-based Business Software Alliance in July 2004  
<http://australianit.news.com.au/articles/0,7204,10071717%5e16123%5e%5enbv%5e,00.html>
38. e.g. Oracle's 2000 patent application for content management systems granted in 2004  
<http://patft.uspto.gov/netacgi/nph-Parser?Sect1=PTO1&Sect2=HITOFF&d=PALL&p=1&u=/netahtml/srchnum.htm&r=1&f=G&l=50&s1=6,745,238.WKU.&OS=PN/6,745,238&RS=PN/6,745,238>
39. In Vietnam, the cost of MS-Office represents 1.4 years' average local wages - Miguel de Icaza, OOoCon 2003
40. For insights into this see <http://www.it-analysis.com/article.php?articleid=12142>
41. Microsoft estimates widely reported in the press in July 2004.
42. Jupiter Media reported in <http://yahoo.pcworld.com/yahoo/article/0,aid,111616,00.asp>
43. Forrester Research reported in [http://www.consultingtimes.com/archives/2004\\_03.html](http://www.consultingtimes.com/archives/2004_03.html)
44. e.g. PC Treasures Inc's Business Works Suite  
<http://www.pctreasures.com/bundles/bussworkplus04.htm>
45. e.g. Scotland, Europe -  
[http://www.theregister.co.uk/2003/12/18/openoffice\\_cds\\_live\\_for\\_lending/](http://www.theregister.co.uk/2003/12/18/openoffice_cds_live_for_lending/)
46. SourceForge at <http://www.sf.net> is the best known and most widely used repository of open-source projects. Several OpenOffice.org 'spin-offs' are hosted there such as OOoExtras
47. php - php Hypertext Processor - is a common open-source scripting language for web sites - see <http://www.php.net>
48. Thanks to Bob Kerr for this list  
<http://marketing.openoffice.org/servlets/ReadMsg?list=dev&msgId=1489564>