

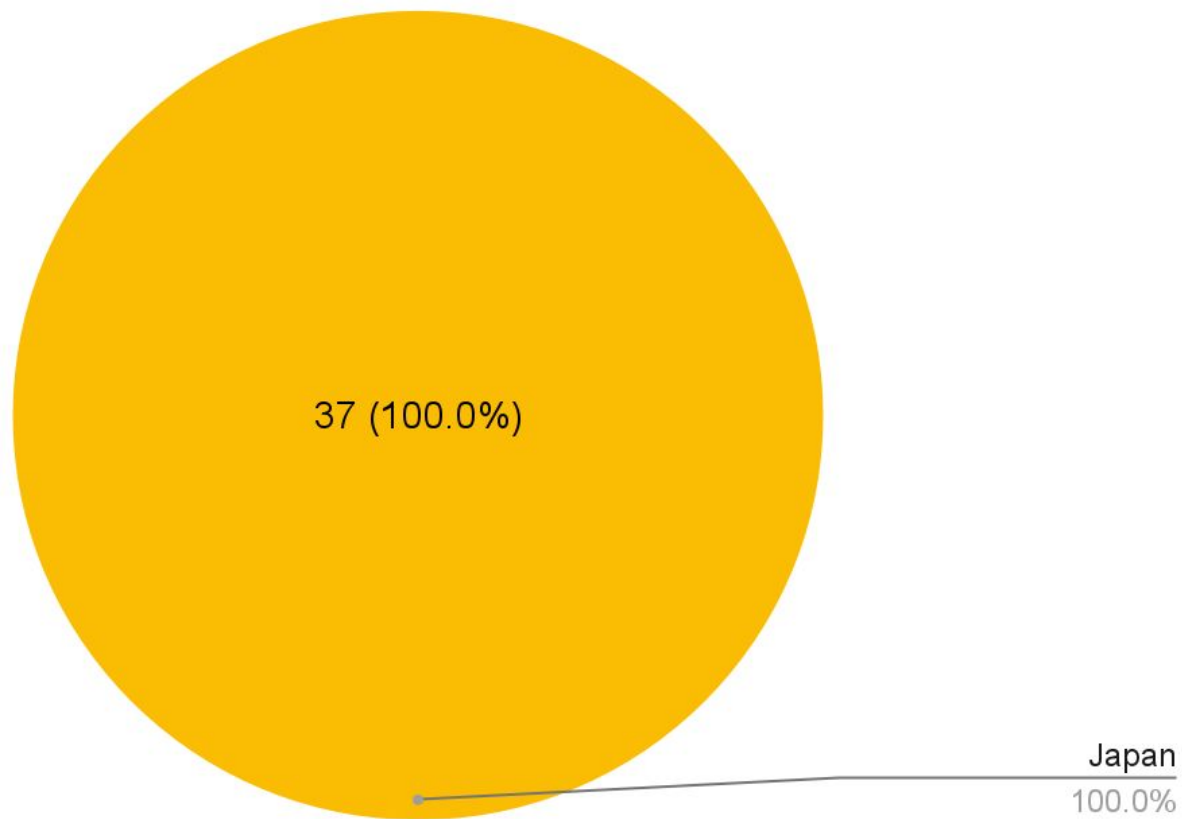
# The OpenChain Industry Survey 2023

April 30, 2023

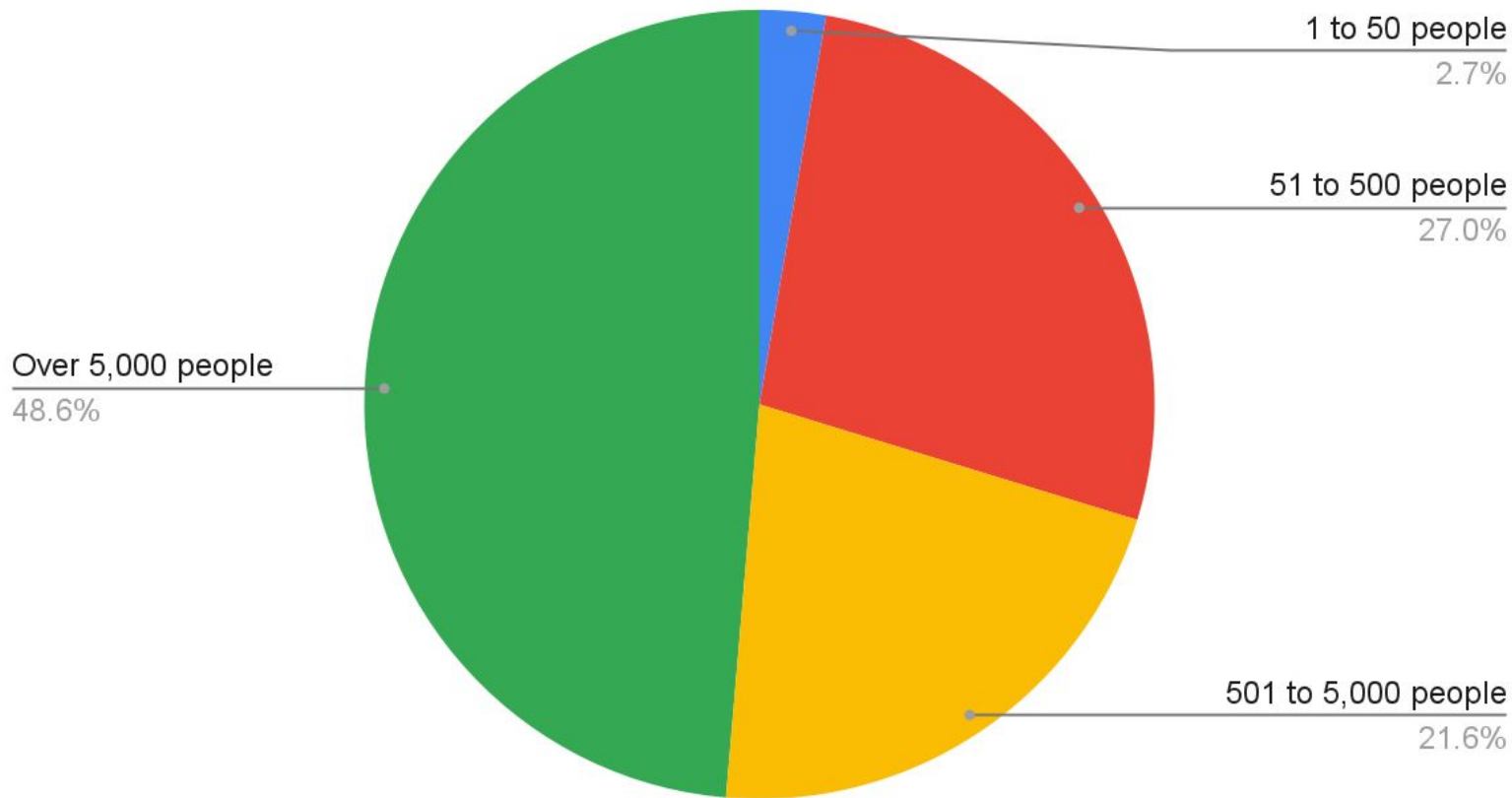
OpenChain Japan workgroup

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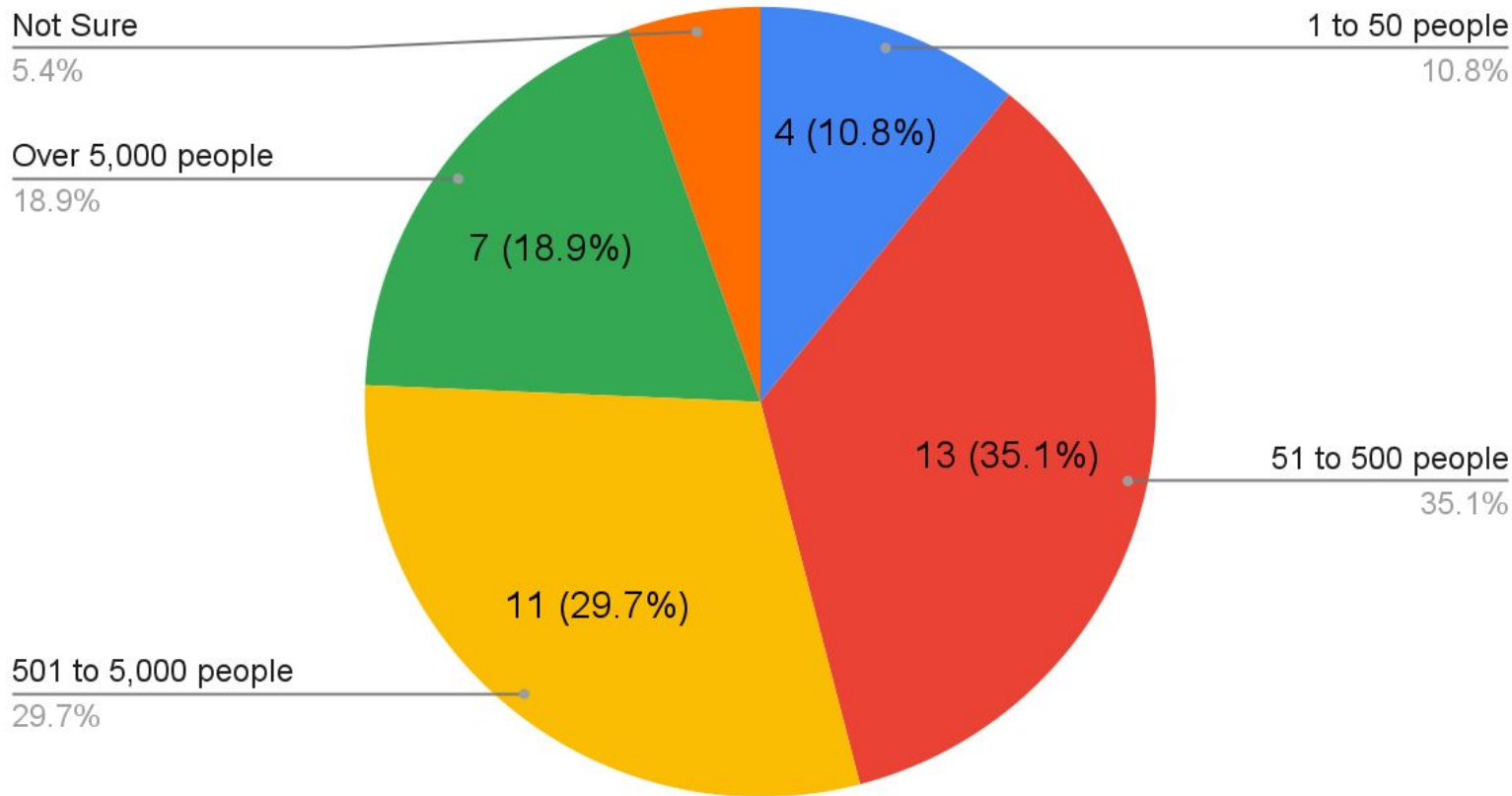
Where are you based?



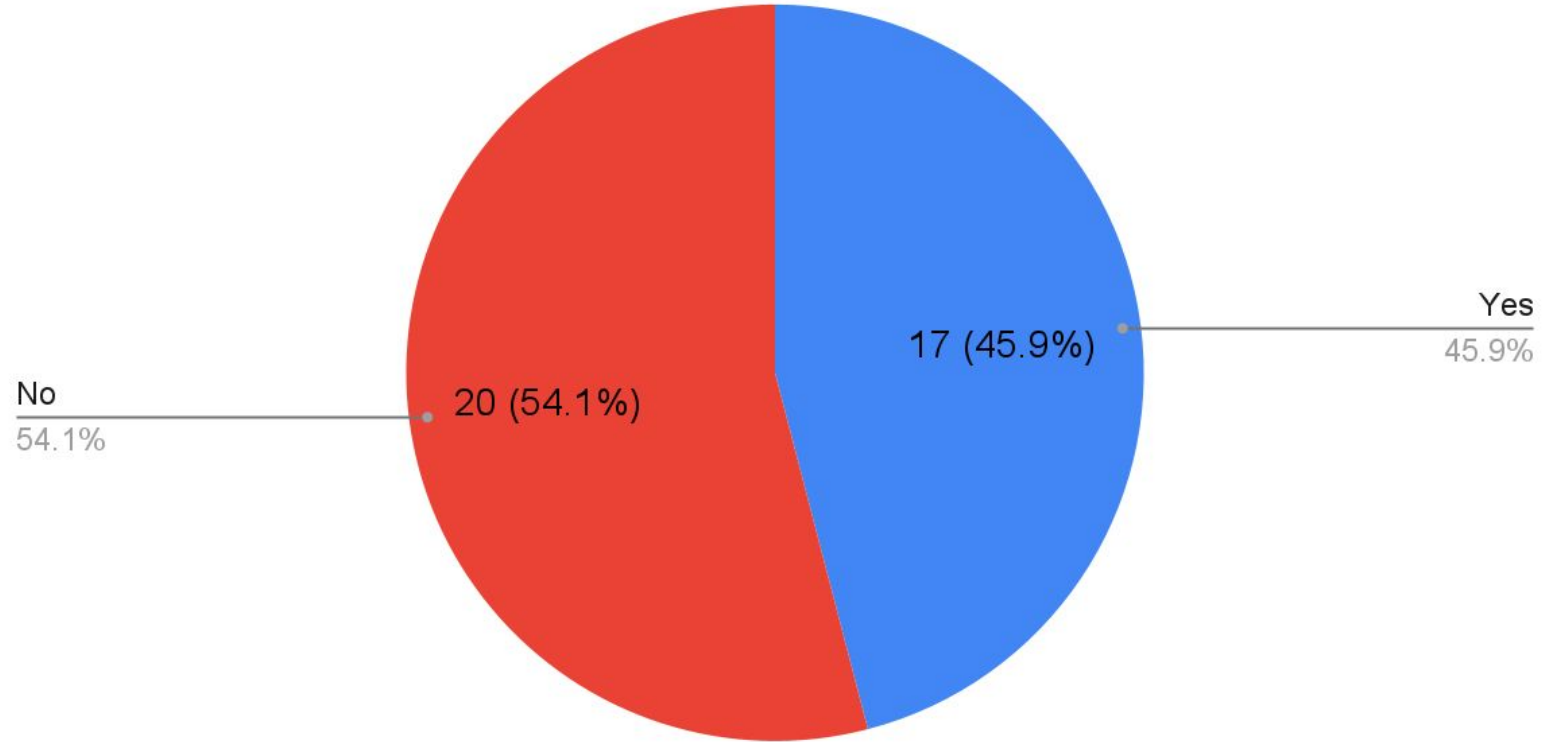
## How big is your organization?



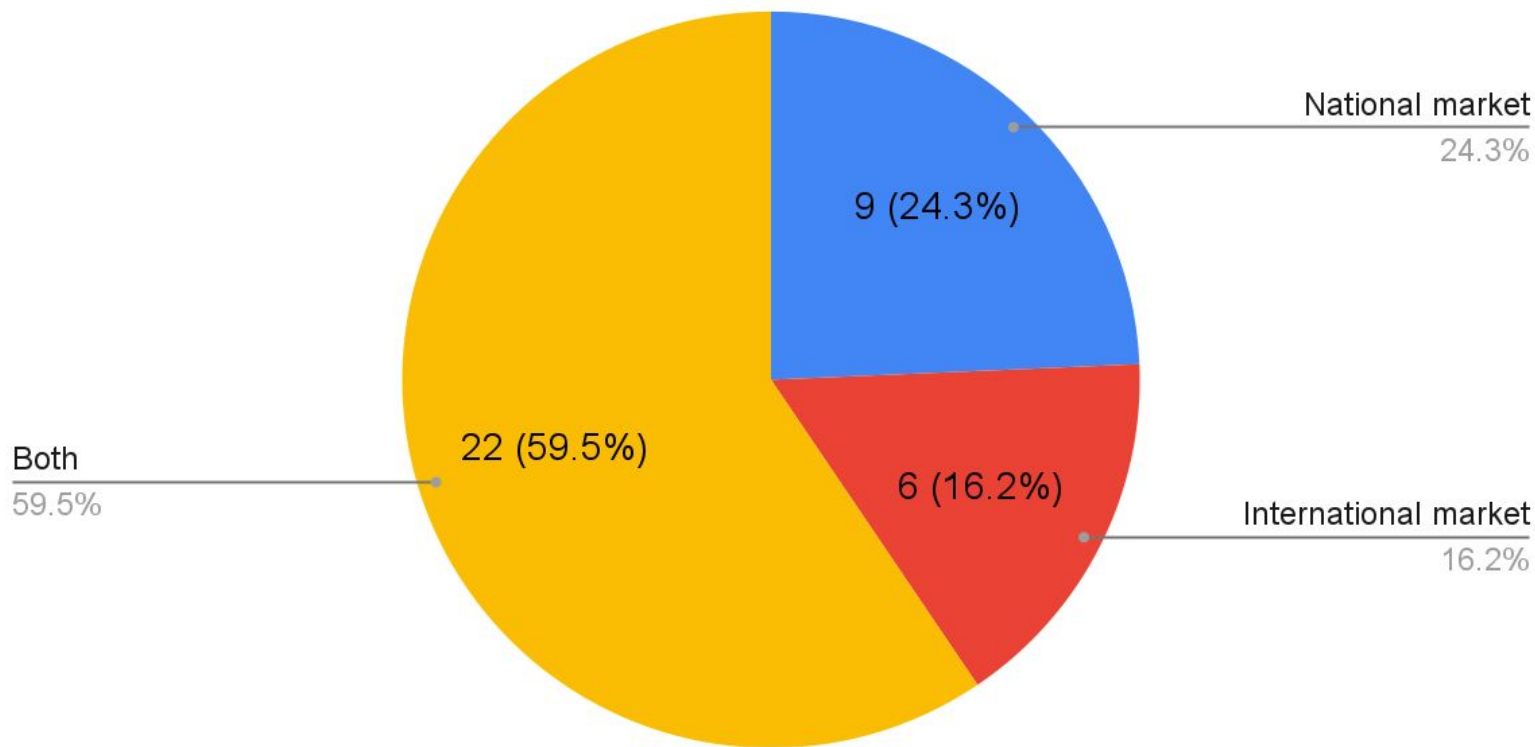
# How many software staff are in your organization?



Is your organization publicly traded (NYSE, LSE, SHCOMP etc.)?

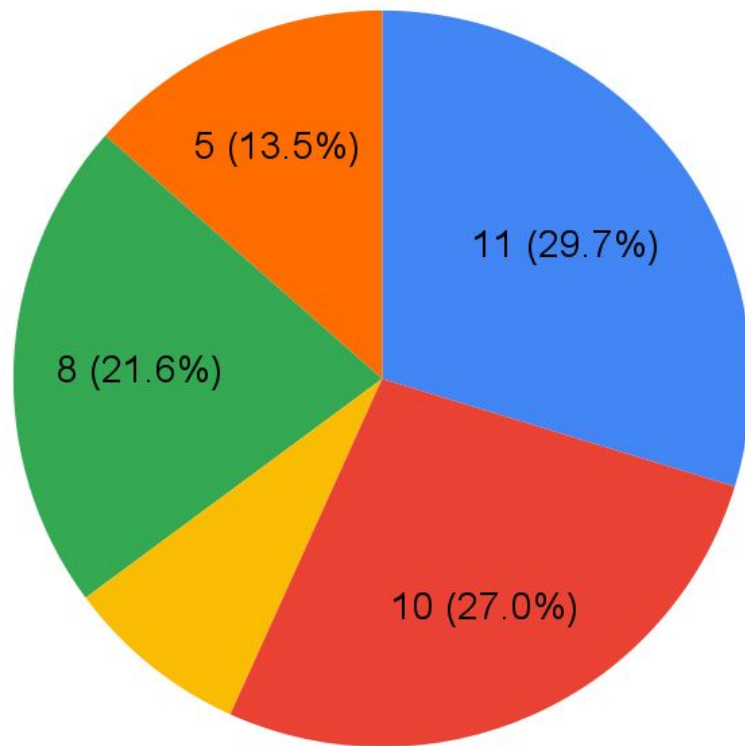


## Is your organization focused on the national or international market?



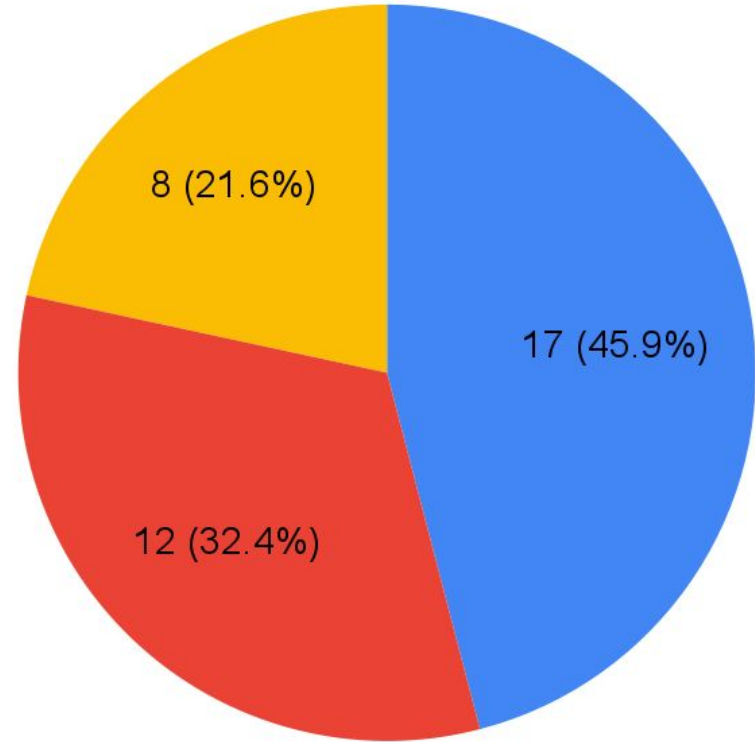
## Does your organization have a documented strategy regarding open source?

- Yes, it regards open source as vital
- Yes, it regards open source as useful
- Yes, it regards open source as problematic
- No, there is not open source strategy
- My organization has a mixed attitude towards open source



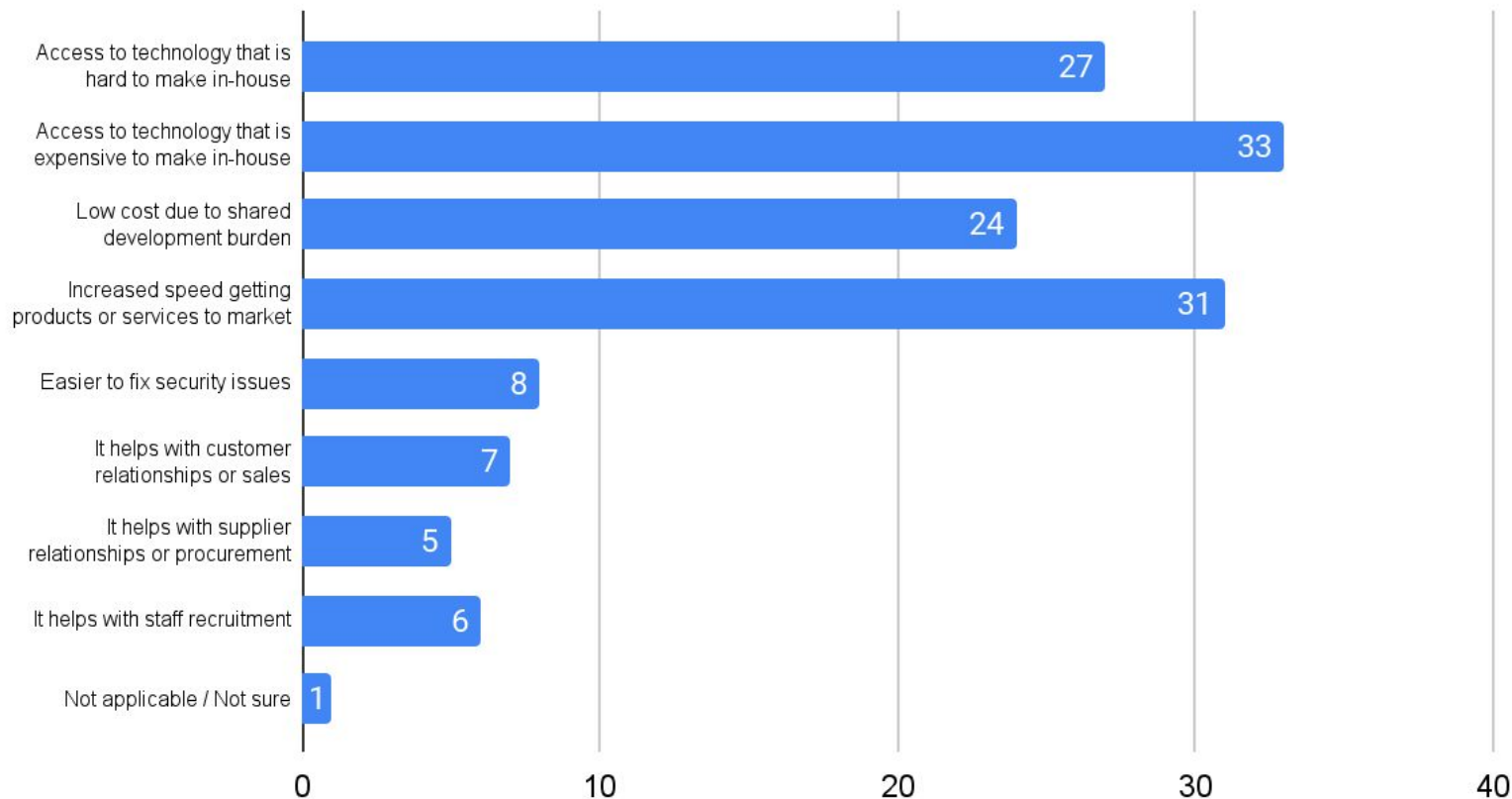
# Has your organization changed its strategy on open source over time?

- Yes, our stance has changed over time
- No, we have always held the same position
- Not Sure

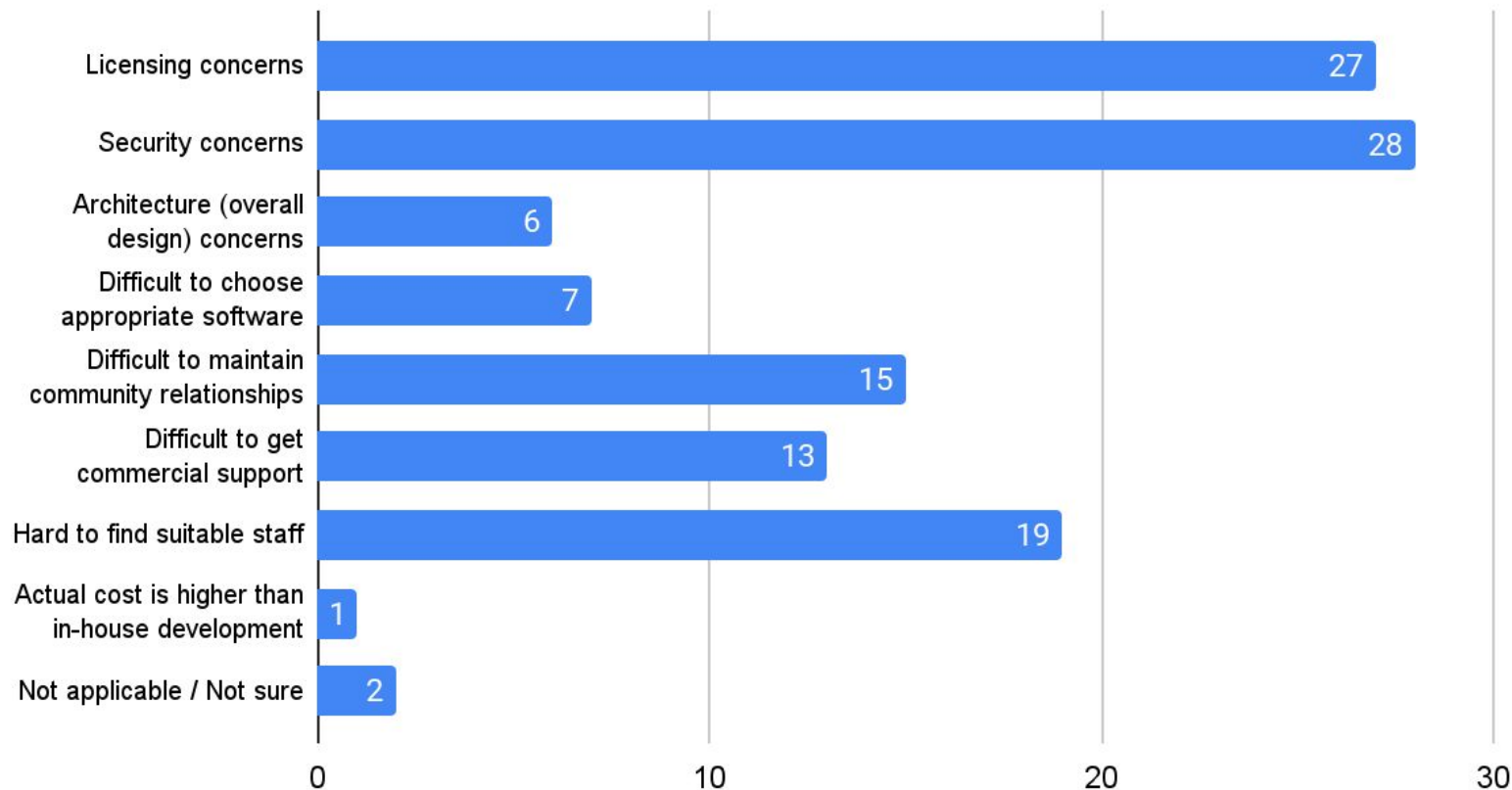




# Why does your organization think open source is vital or useful?



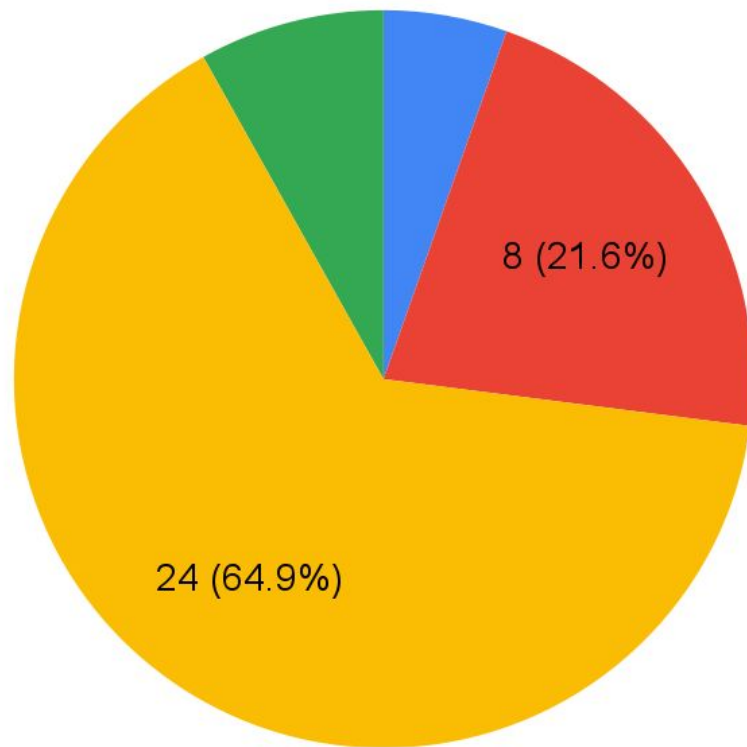
# Why does your organization think open source is problematic?



# How do you use open source?

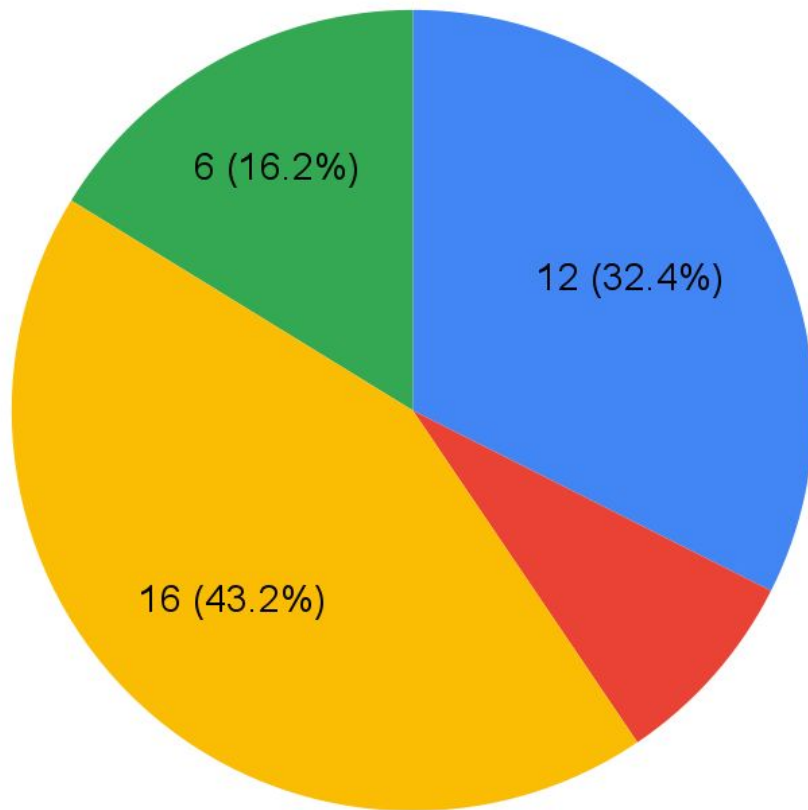
全体

- We use open source for internal codebases
- We use open source for external codebases
- We use open source for both internal and external codebases
- Not Sure



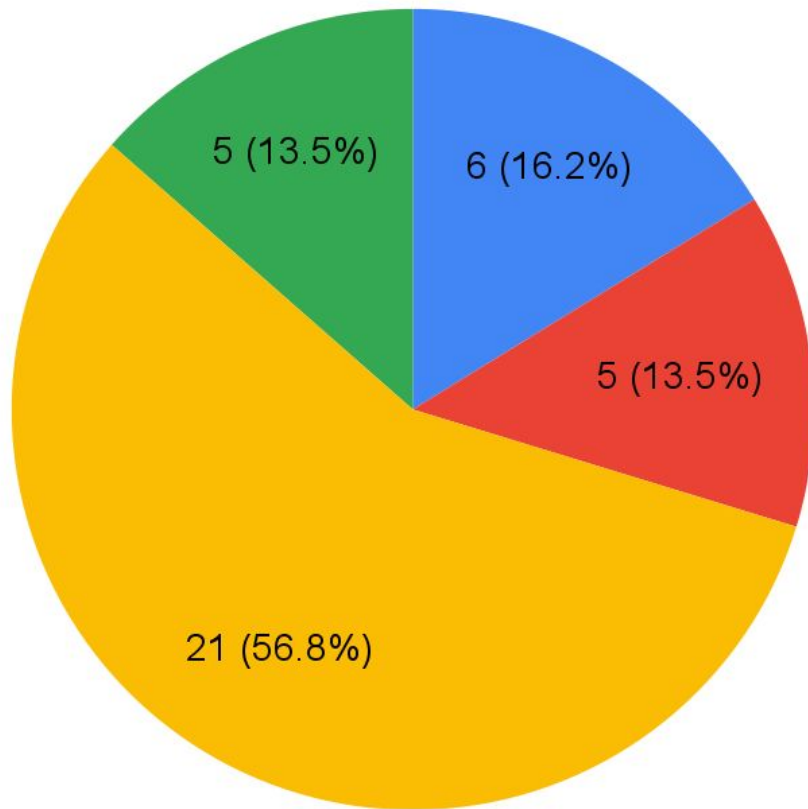
## If you use open source internally, how do you use it?

- We use open source unmodified
- We customize open source
- We use open source both unmodified and customized
- Not Sure



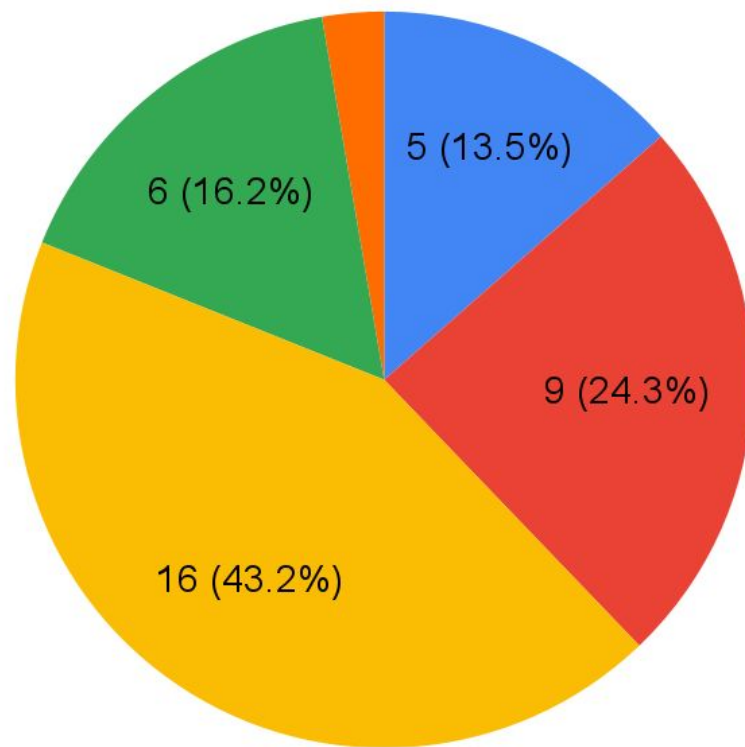
## If you use open source externally, how do you use it?

- We use open source unmodified
- We customize open source
- We use open source both unmodified and customized
- Not Sure



## Do you have dedicated personnel for open source strategy and management?

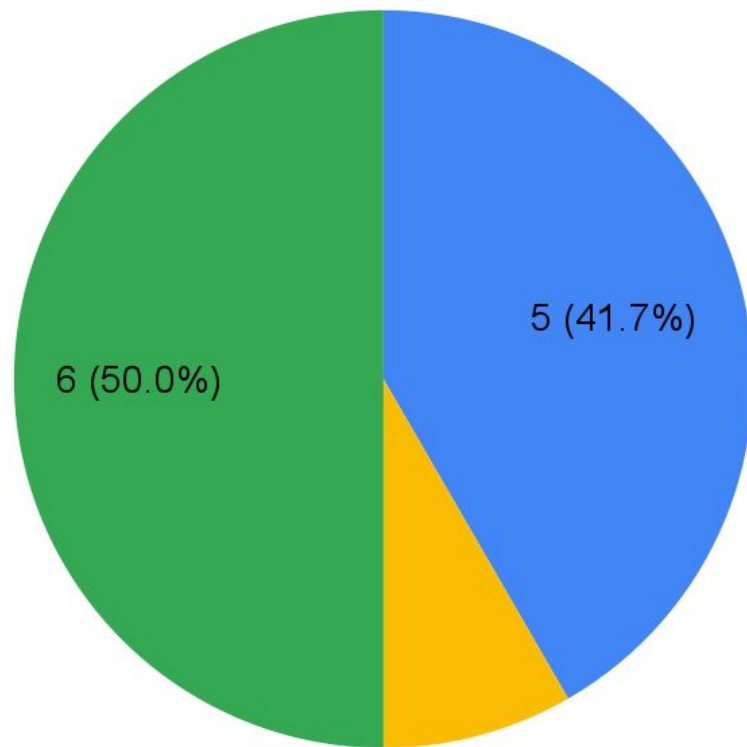
- Yes, we have a dedicated Open Source Program Office (OSPO)
- Yes, we have a virtual OSPO (part-time)
- No, but we have personnel doing open source strategy and management
- No, we do not have personnel doing open source strategy and management
- Not Sure



# If you have an OSPO, does it have a budget?

Exclude Not applicable / Not sure

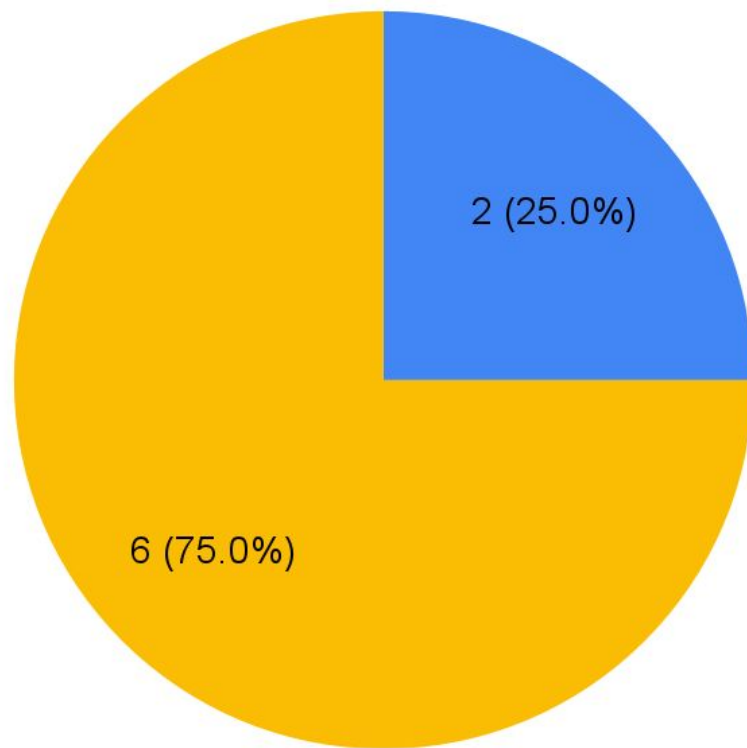
- Yes, it has yearly budget
- Yes, it is a hybrid model with a mixture of budgeted and volunteer staff
- No, it has no budget



## If you have a virtual OSPO (part-time), does it have a budget?

Exclude Not applicable / Not sure

- Yes, it has yearly budget
- Yes, it is a hybrid model with a mixture of budgeted and volunteer staff

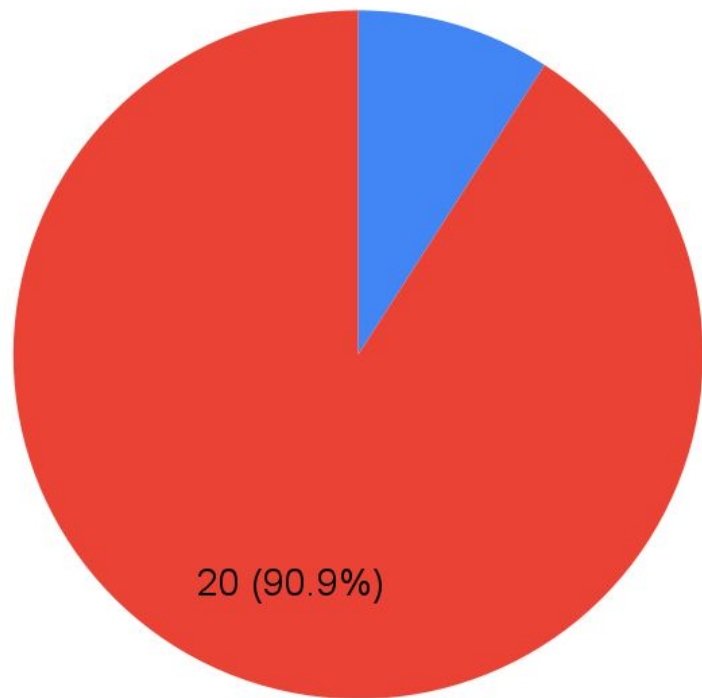




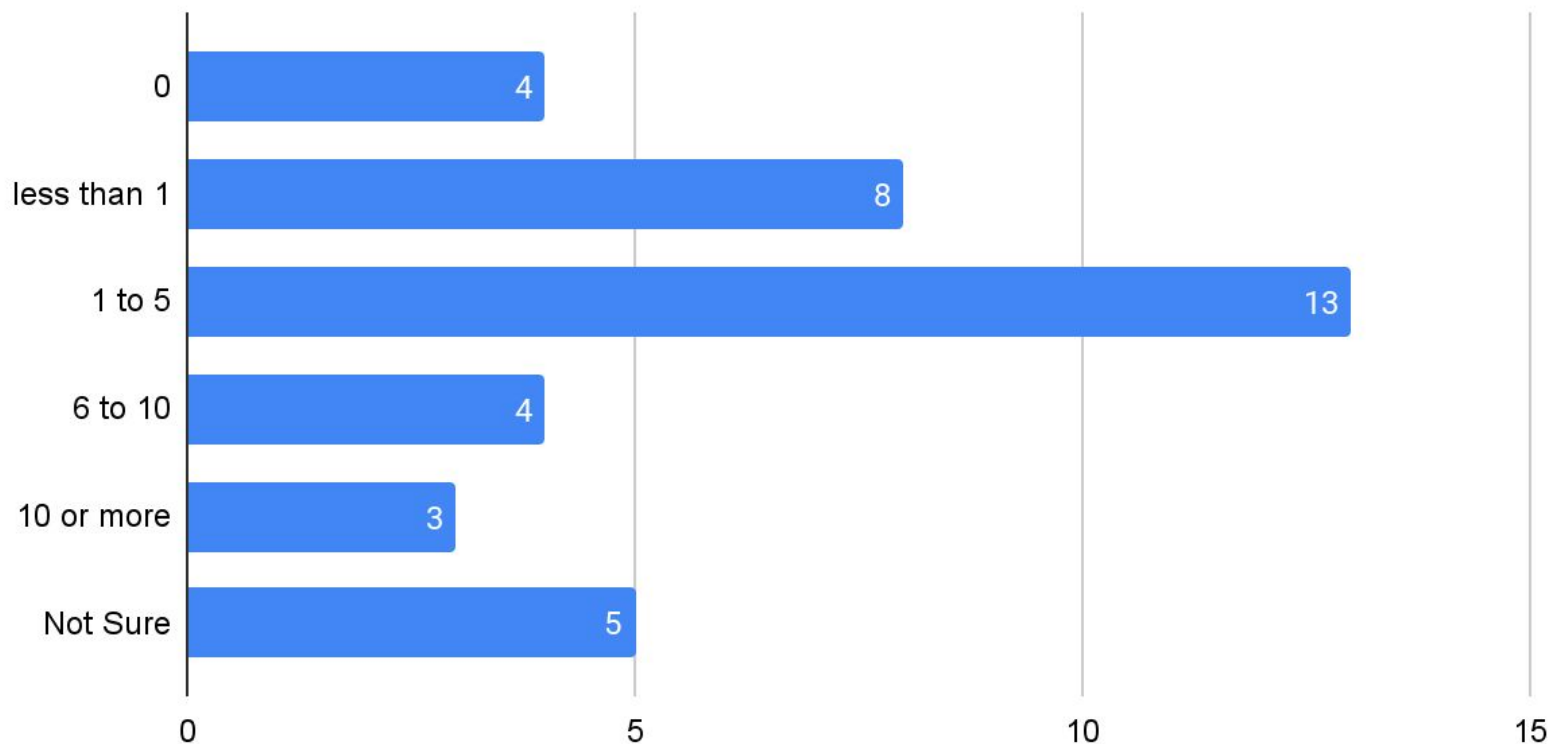
If you have no OSPO but personnel are doing open source strategy and management, is this essentially a volunteer activity?

Exclude Not applicable / Not sure

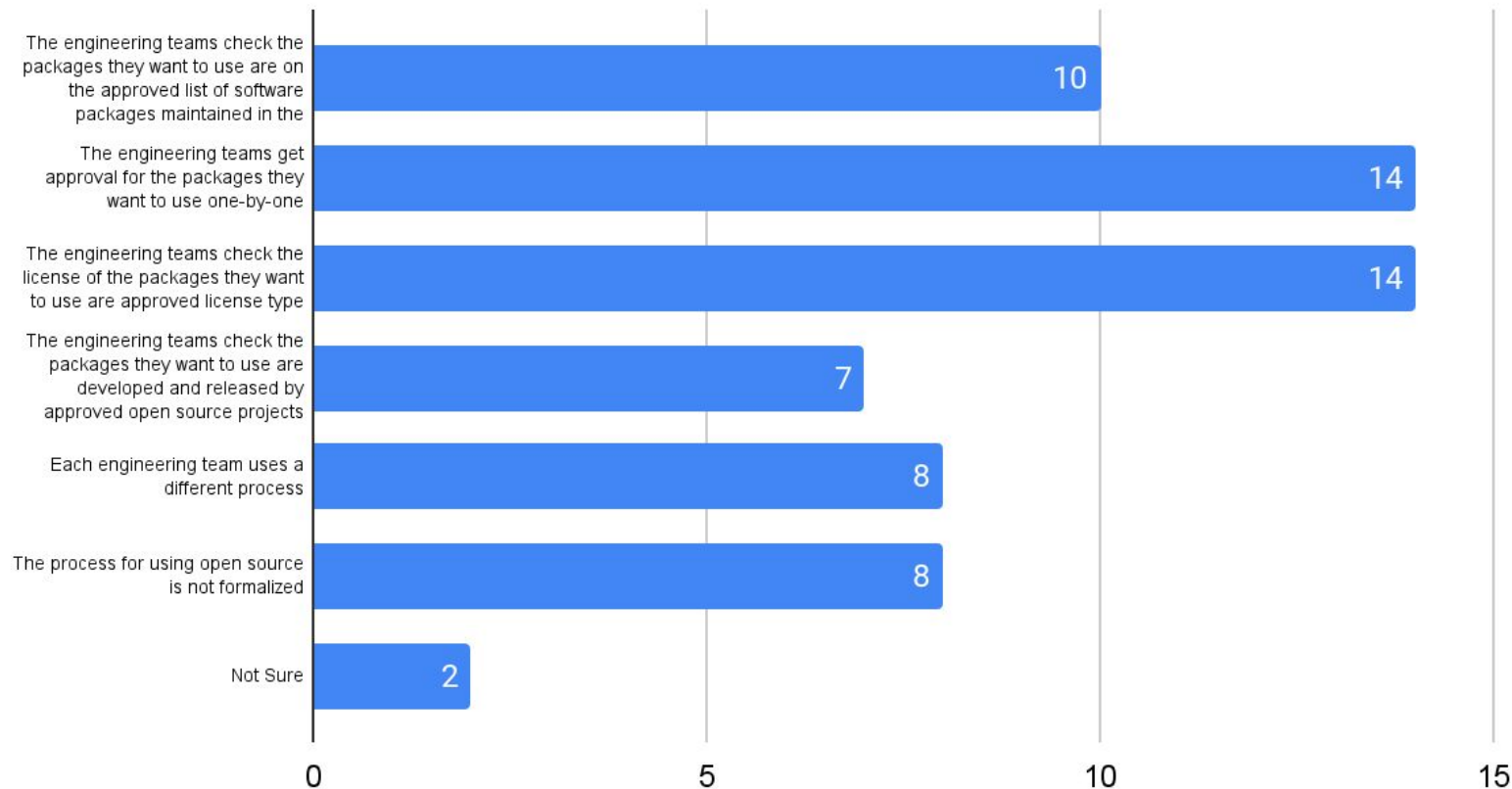
- Yes, it is in addition to their regular work
- No, it is considered part of their regular work



## How many Full Time Equivalent (FTE) resources are assigned to open source strategy?

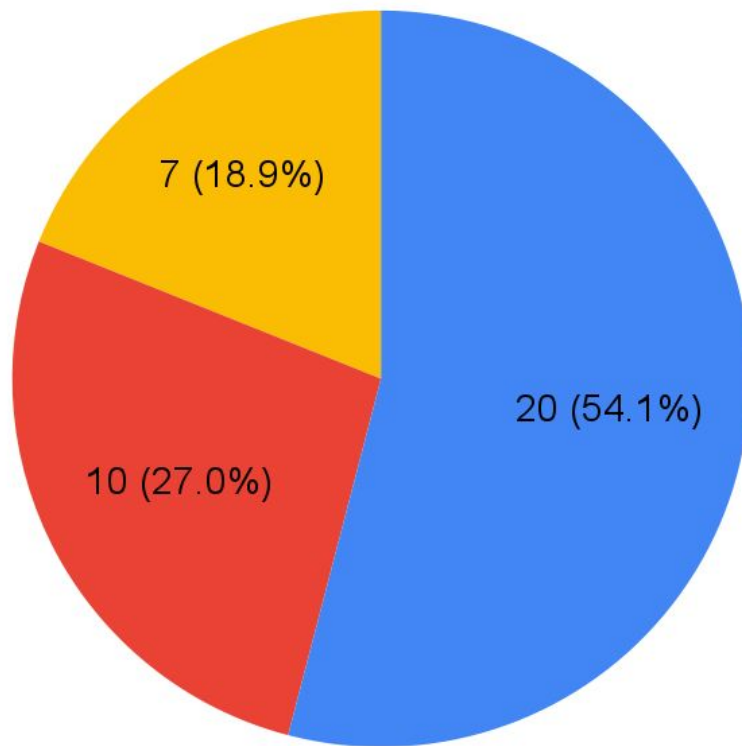


# How do you choose open source for use in your organization?



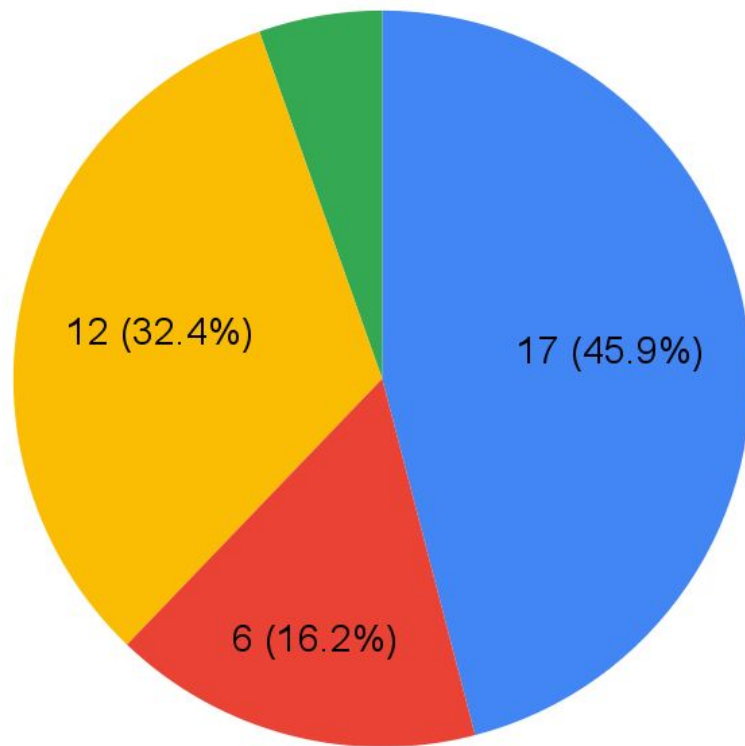
## Has your organization changed its criteria for using open source over time?

- Yes, our stance has changed over time
- No, we have always held the same position
- Not Sure

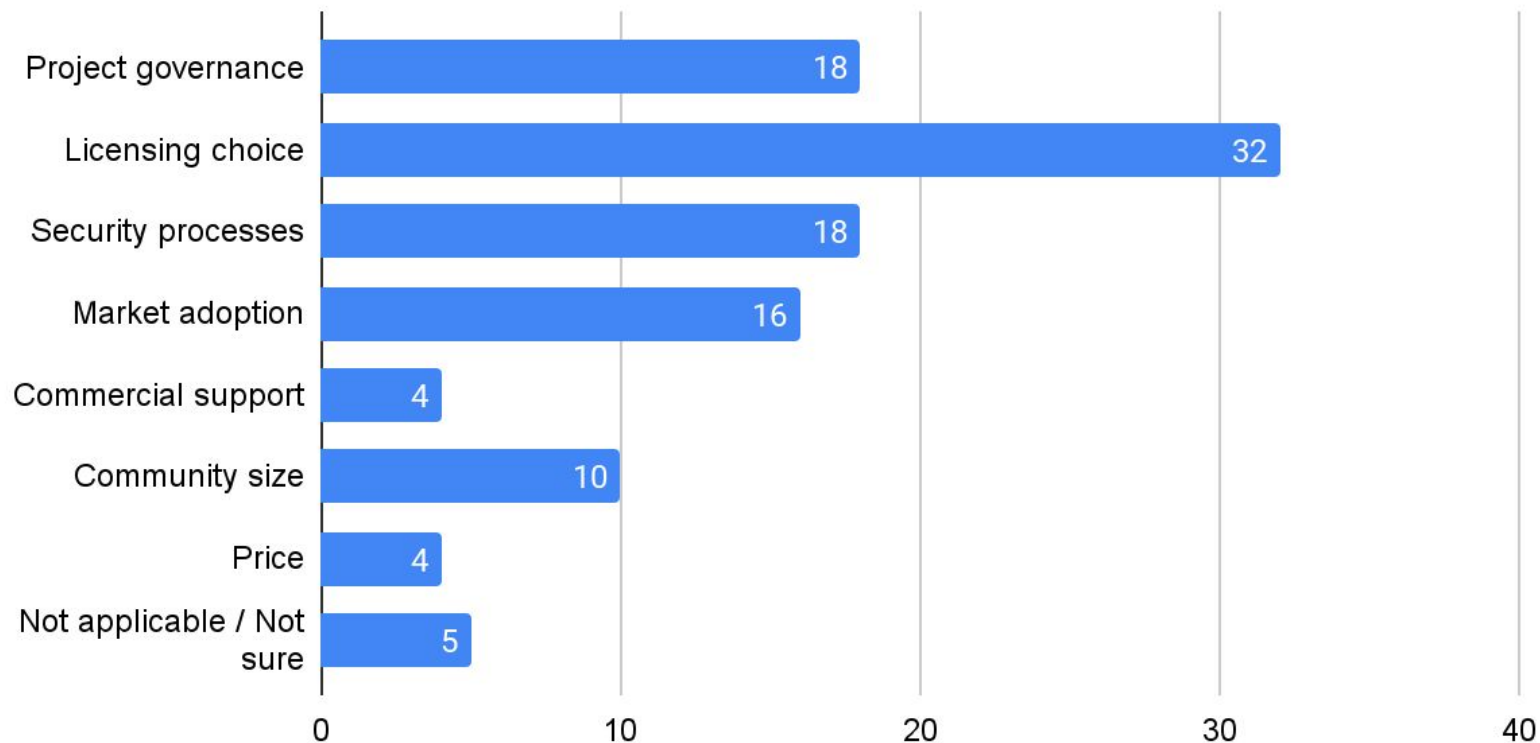


## Do you have a documented open source policy for everyone in the organization to follow?

- Yes, we have a documented organization policy
- Yes, we have documented policies in sections of our organization
- No, we do not have a documented policy
- Not Sure

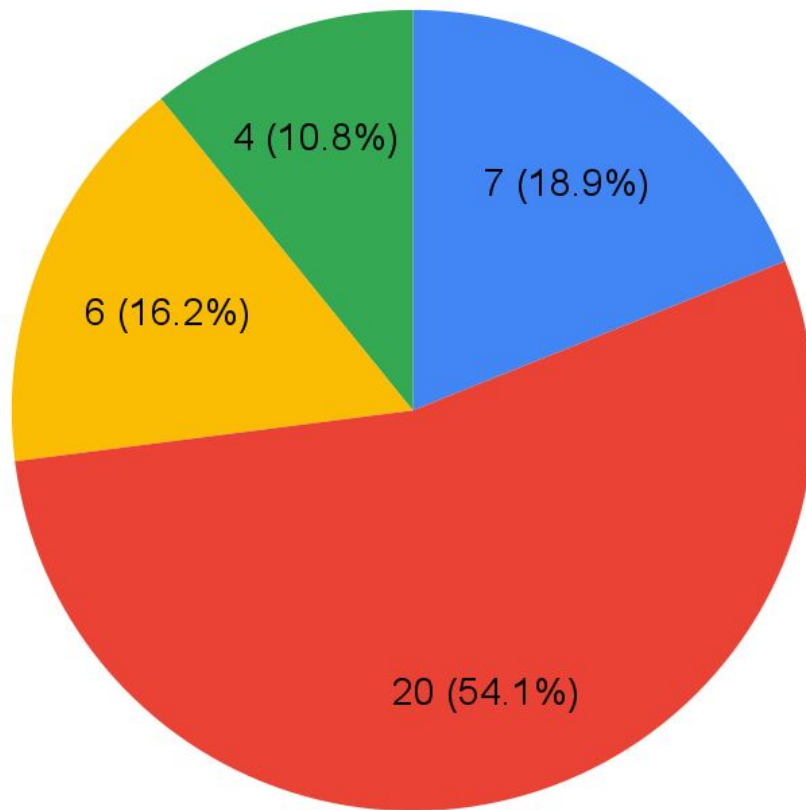


## What are your main criteria for allowing open source code to be used?



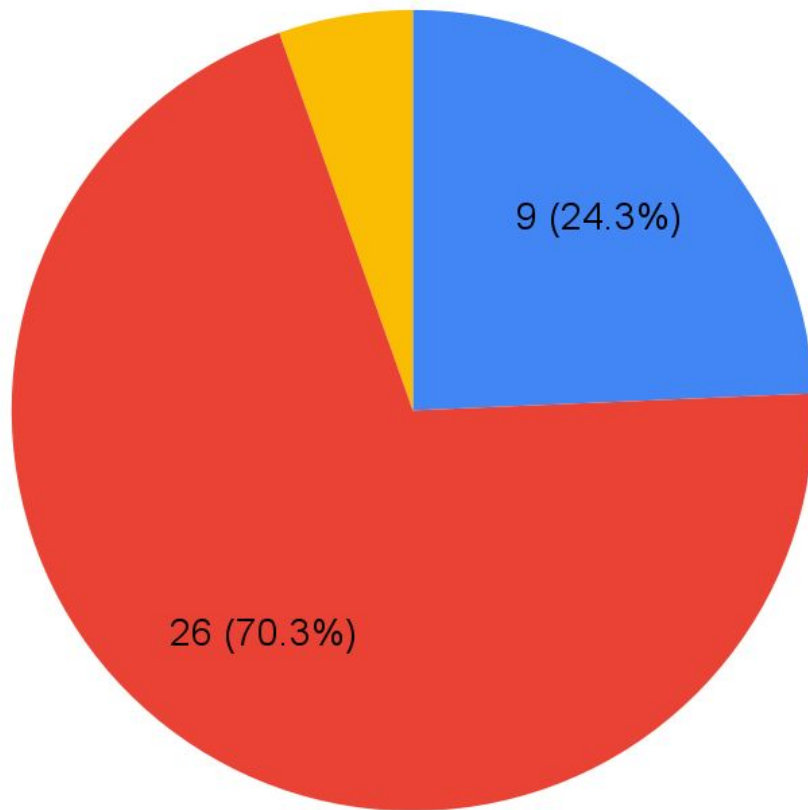
# Does your organization contribute back to open source projects?

- Yes, we have a general strategy to contribute upstream
- Yes, we contribute back on a case-by-case basis
- No, we have a general strategy not to contribute upstream
- Not Sure



## Does your organization create new open source projects?

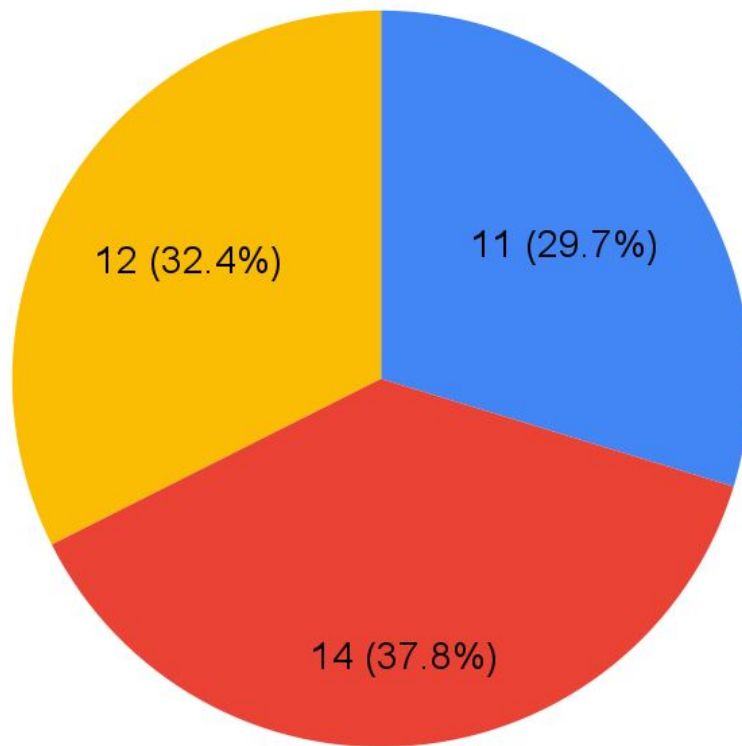
- Yes, we release open source projects
- No, we do not release open source projects
- Not Sure





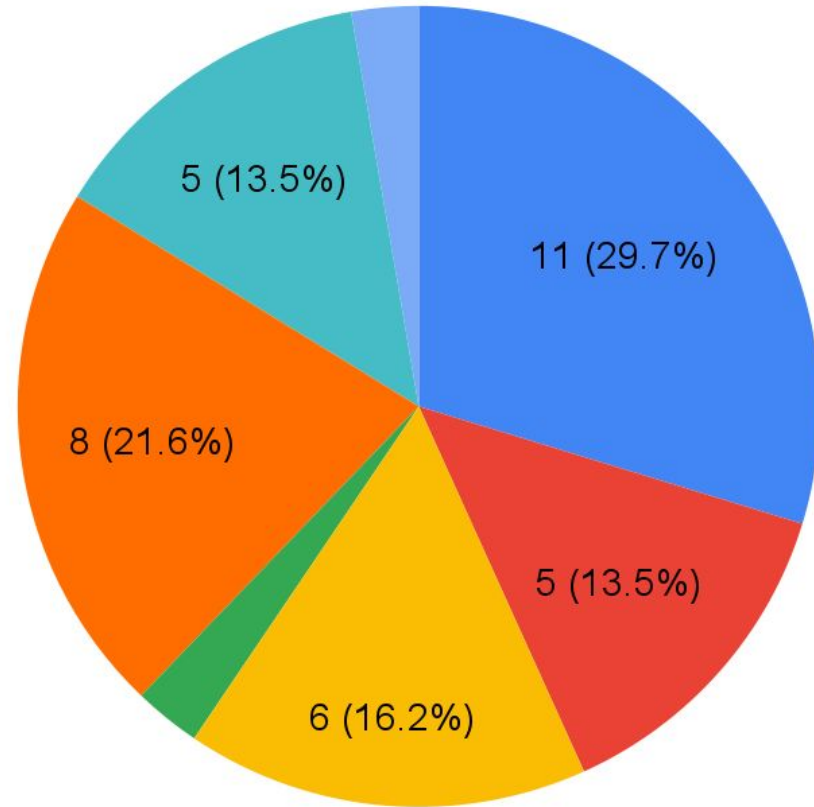
## Has your organization changed its position on creating new open source projects over time?

- Yes, our stance has changed over time
- No, we have always held the same position
- Not Sure



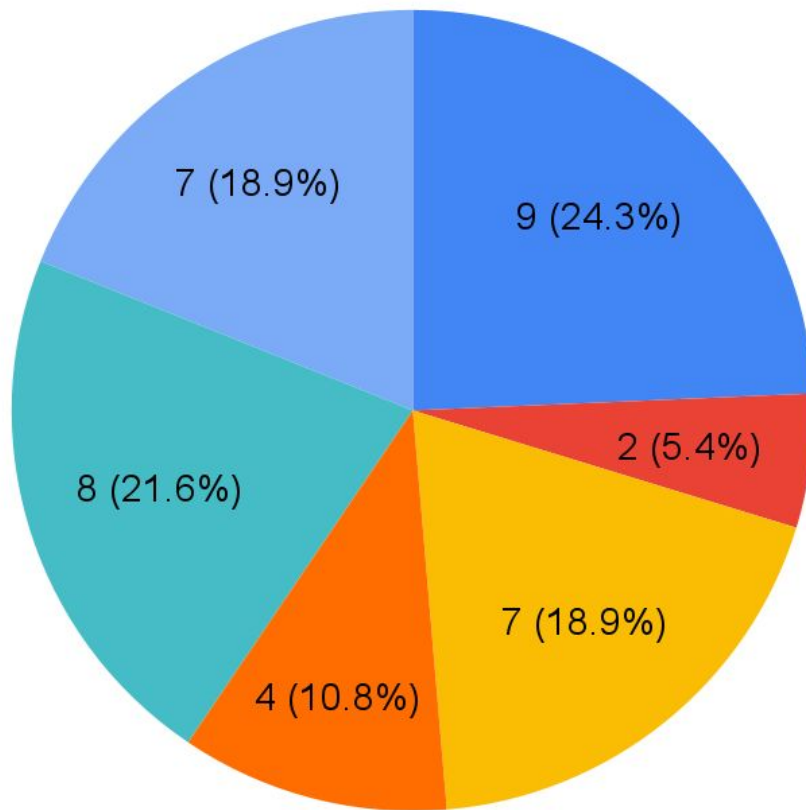
# How do you address open source license compliance?

- We have organizational processes to check for license compliance
- We have organizational processes and automation to check for license compliance
- We have department-level processes to check for license compliance
- We have department-level processes and automation to check for license compliance
- We do it on a case-by-case basis
- We do not have processes or approaches to address open source license
- Not applicable / Not sure



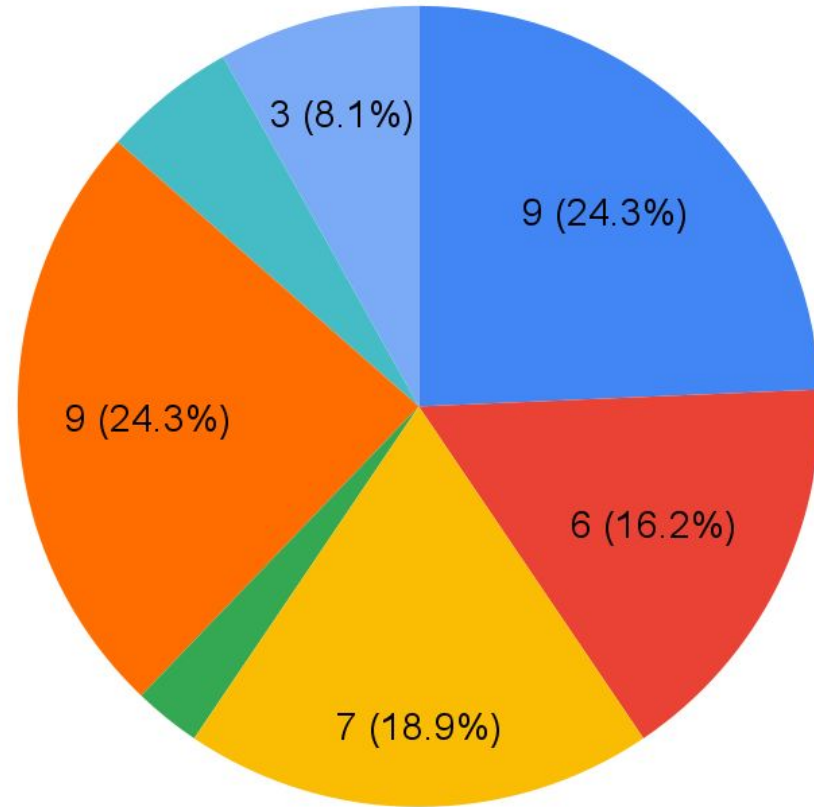
## How do you address open source export-control?

- We have organizational processes to check for export-control
- We have organizational processes and automation to check for export-control
- We have department-level processes to check for export-control
- We do it on a case-by-case basis
- We do not have processes or approaches to address open source export-control
- Not applicable / Not sure



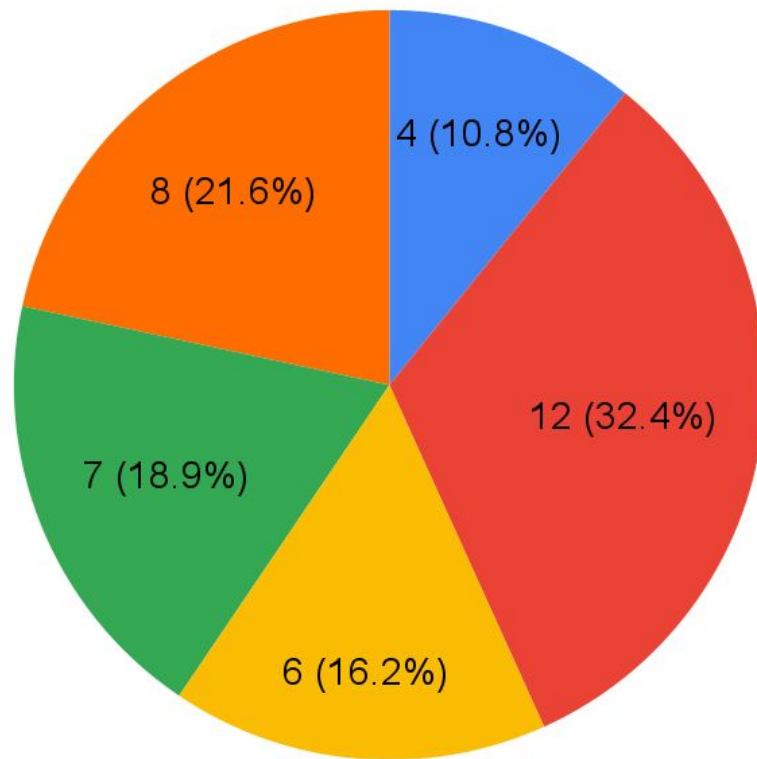
# How do you address open source security?

- We have organizational processes to check for security
- We have organizational processes and automation to check for security compliance
- We have department-level processes to check for security
- We have department-level processes and automation to check for security
- We do it on a case-by-case basis
- We do not have processes or approaches to address open source security
- Not applicable / Not sure



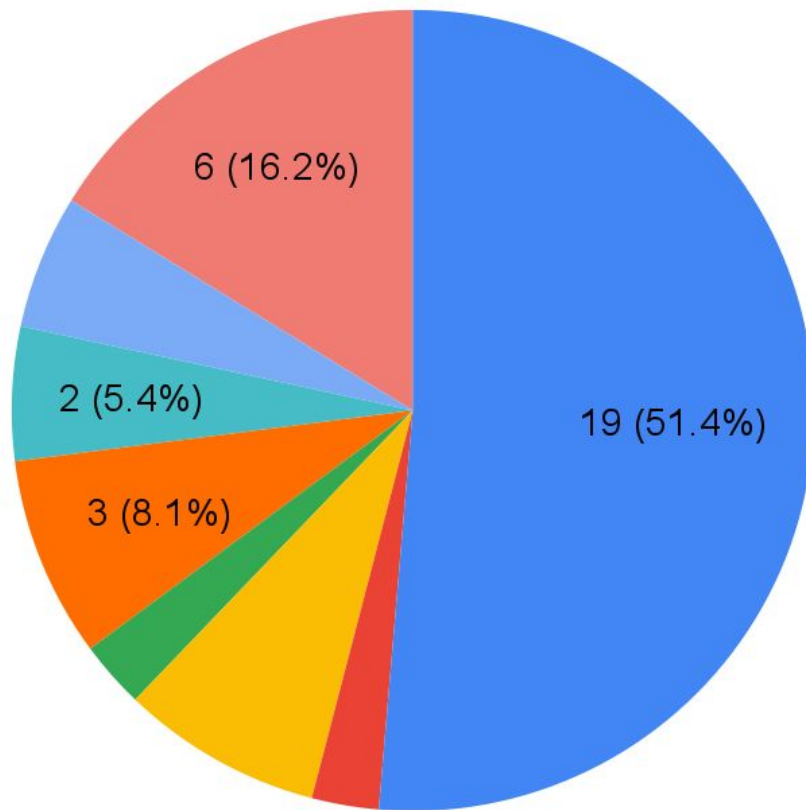
## Do you use open source tooling (automation) for license compliance, export-control or security?

- Yes, we use open source tooling for our compliance processes
- Yes, we use a mixture of open source and proprietary tooling for our compliance processes
- No, we only use proprietary tooling for our compliance processes
- No, we don't use tooling for compliance processes
- Not applicable / Not sure



## How often do you check for license compliance issues?

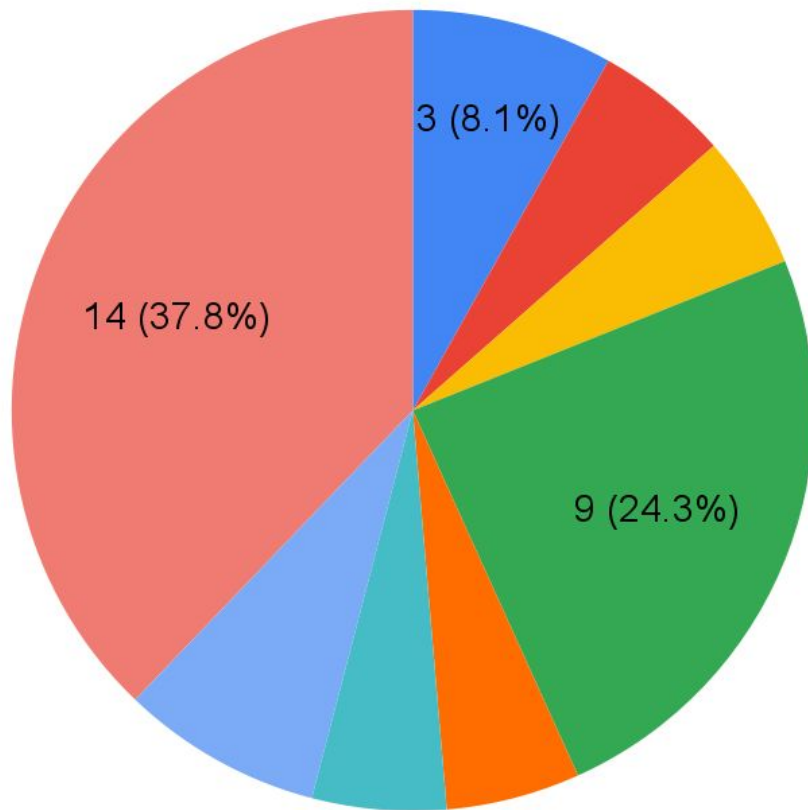
- We check inbound, during the development process and outbound
- We check inbound
- We check during the development process
- We check outbound
- We check inbound and during development
- We check during development and outbound
- We check inbound and outbound
- Not applicable / Not sure





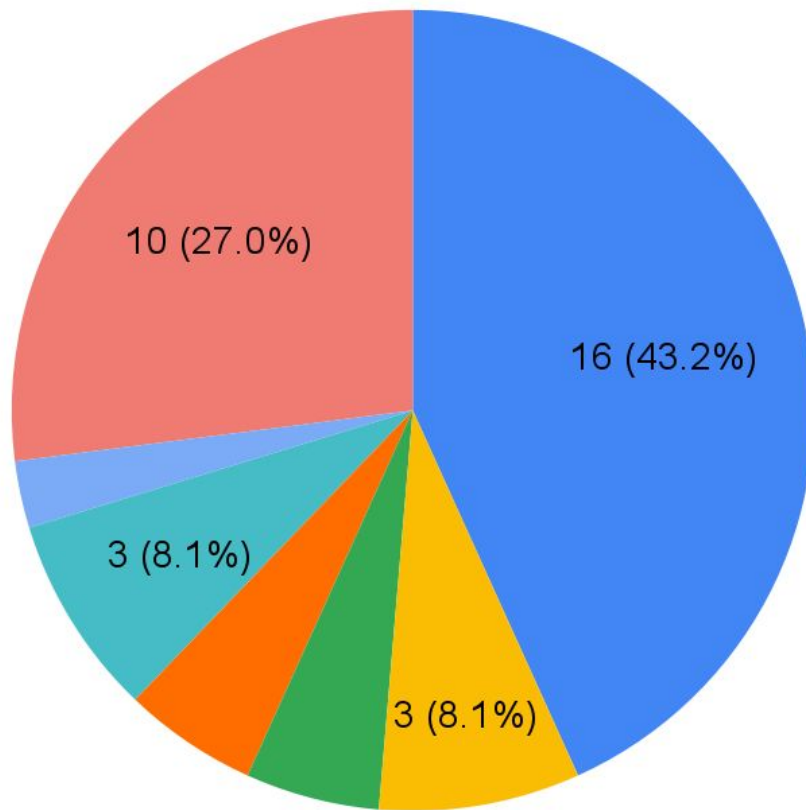
## How often do you check for export-control issues?

- We check inbound, during the development process and outbound
- We check inbound
- We check during the development process
- We check outbound
- We check inbound and during development
- We check during development and outbound
- We check inbound and outbound
- Not applicable / Not sure



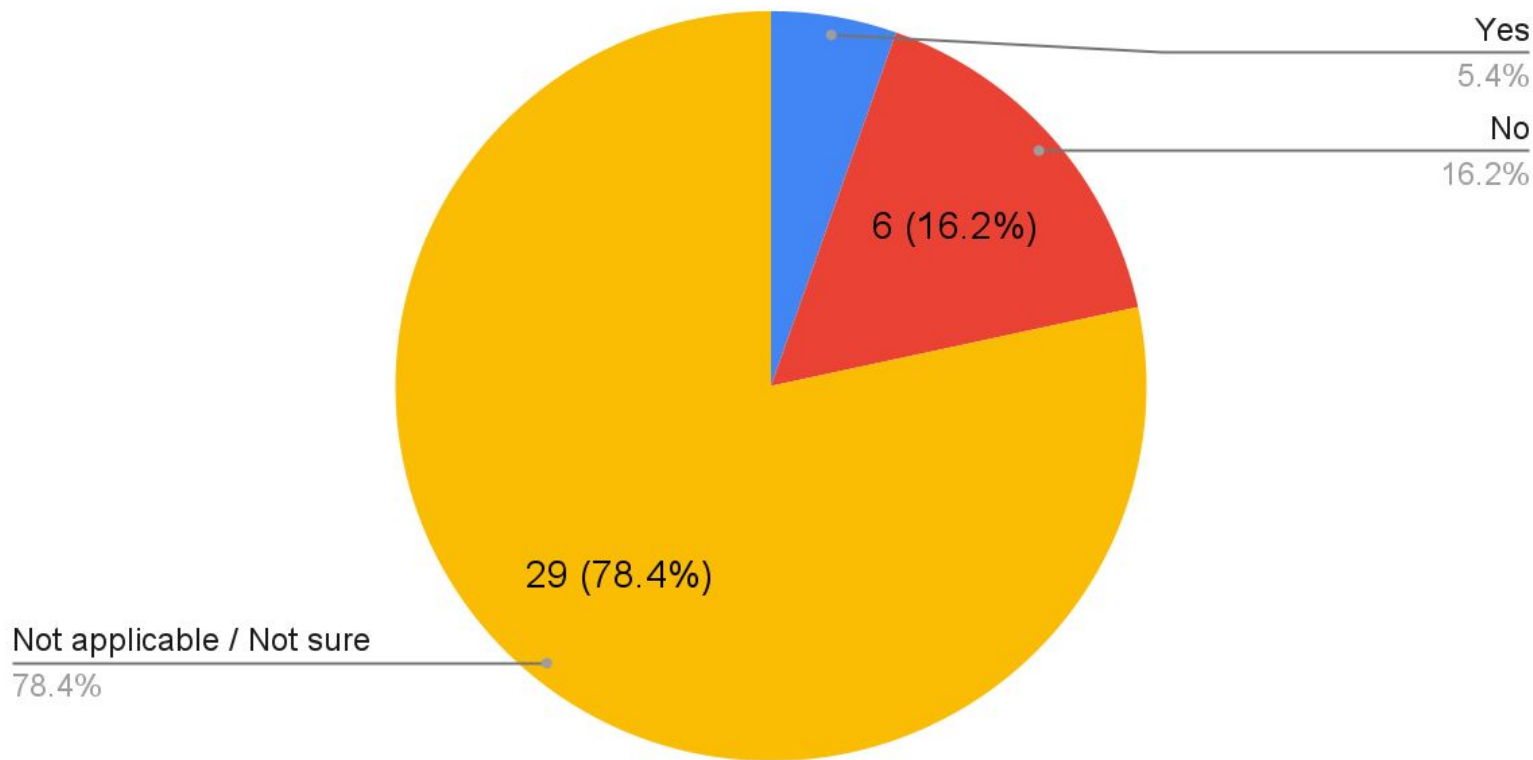
## How often do you check for security issues?

- We check inbound, during the development process and outbound
- We check during the development process
- We check outbound
- We check inbound and during development
- We check during development and outbound
- We check inbound and outbound
- Not applicable / Not sure

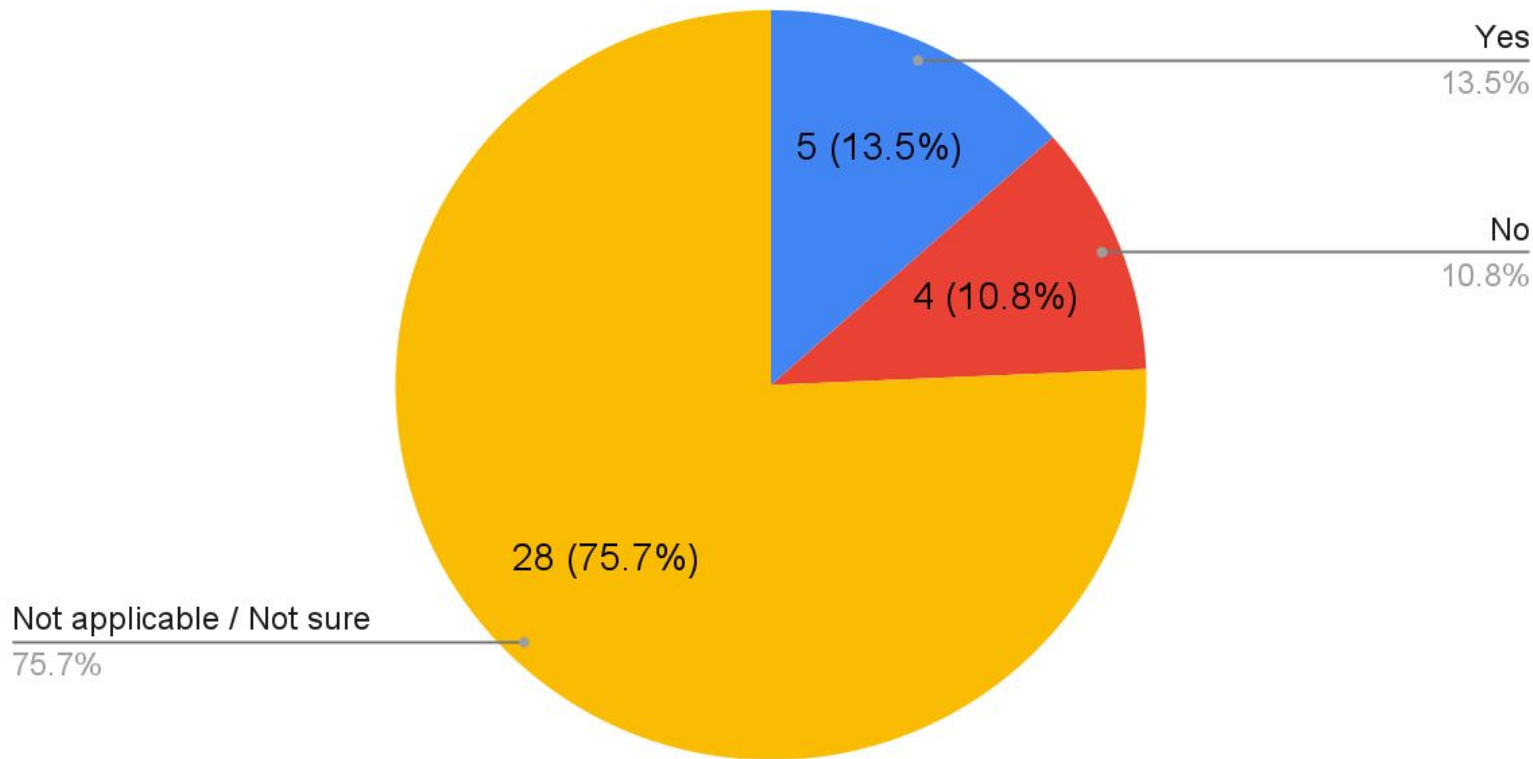




Do you use open source engagement / maturity as a criteria in Mergers and Acquisitions (M&A)?



## Could a lack of open source engagement / maturity be a blocker in Mergers and Acquisitions (M&A)?



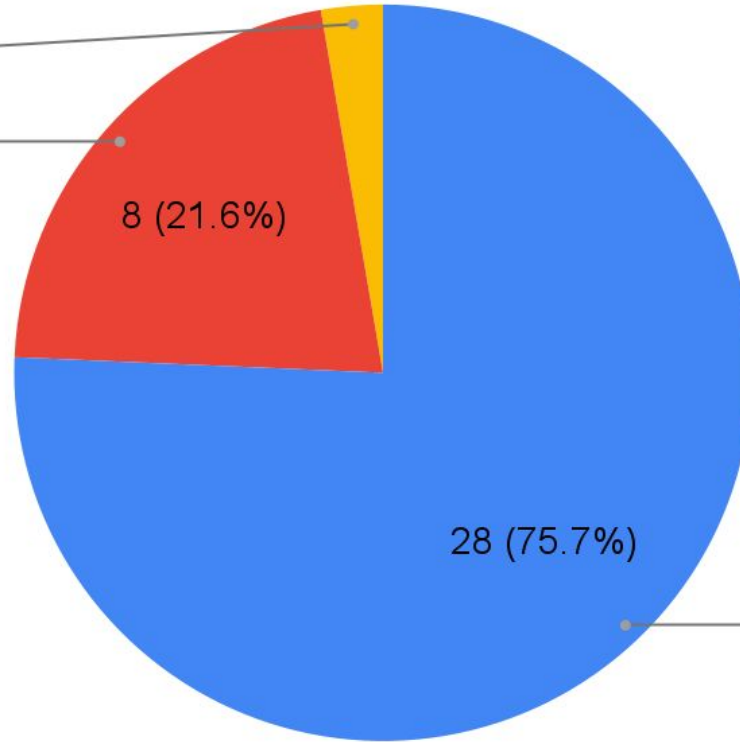
# Are you aware of the OpenChain ISO/IEC 5230:2020 standard for open source license compliance?

Not Sure

2.7%

No

21.6%



Yes

75.7%

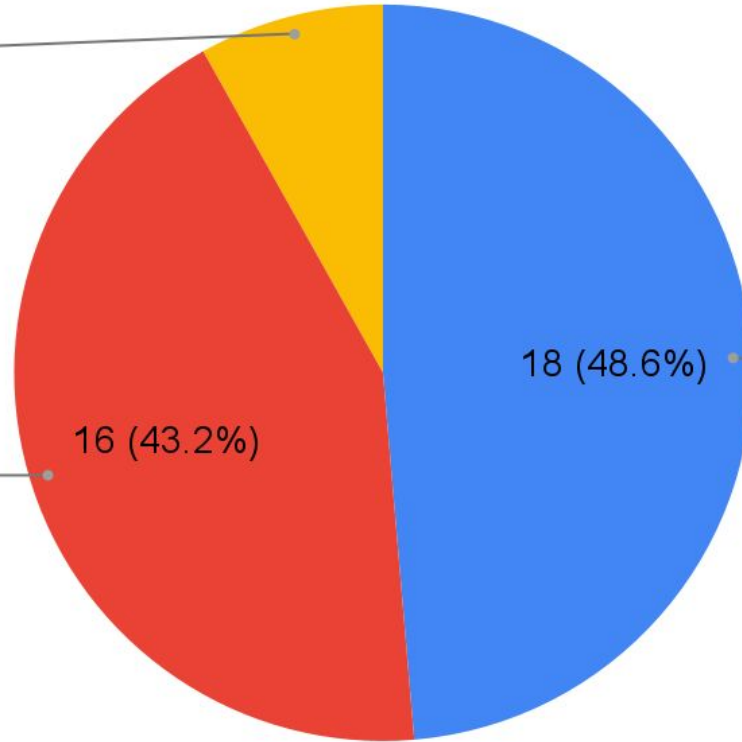
# Are you aware of the OpenChain ISO/IEC DIS 18974 standard for open source security assurance?

Not Sure

8.1%

No

43.2%



Yes

48.6%

18 (48.6%)

16 (43.2%)

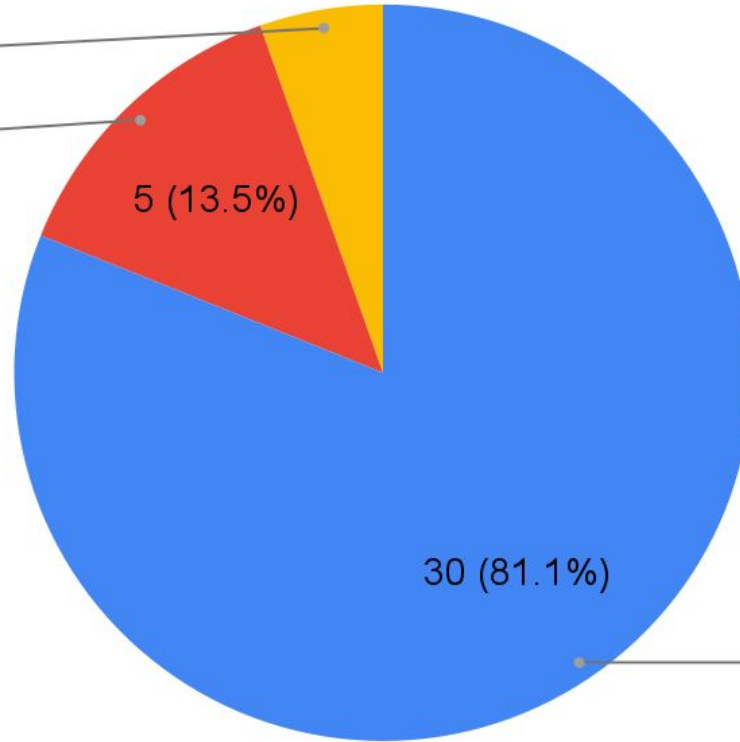
# Are you aware of the SPDX ISO/IEC 5962:2021 standard for software bill of materials?

Not Sure

5.4%

No

13.5%

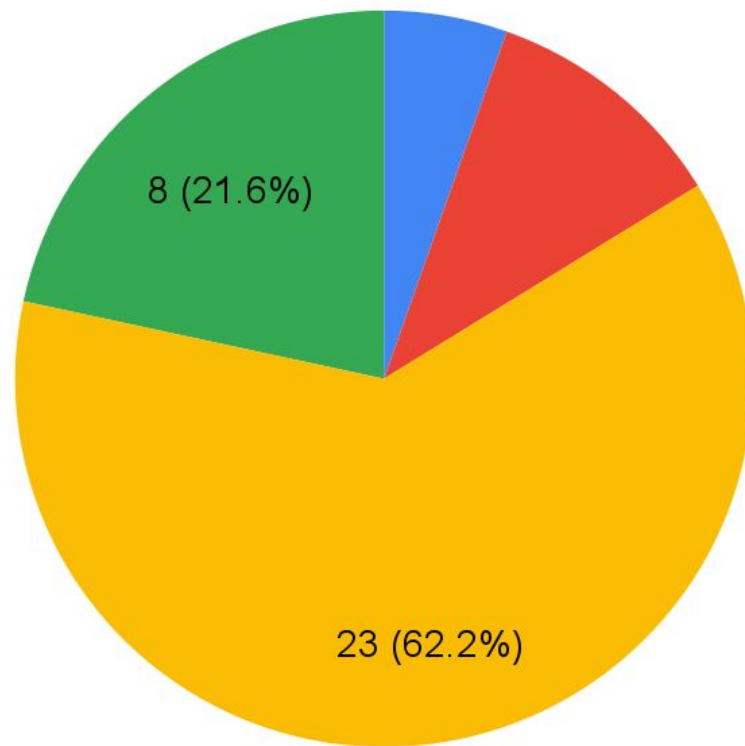


Yes

81.1%

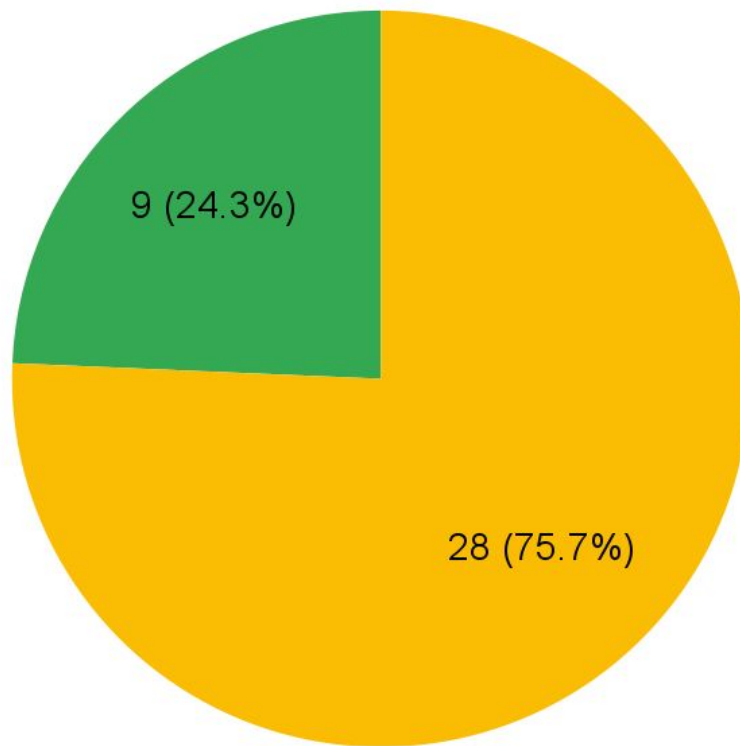
## Do you use the OpenChain ISO/IEC 5230:2020 standard for open source license compliance?

- Yes, we use it for all our open source activities
- Yes, we use it for some open source activities
- No, we do not use it
- Not Sure



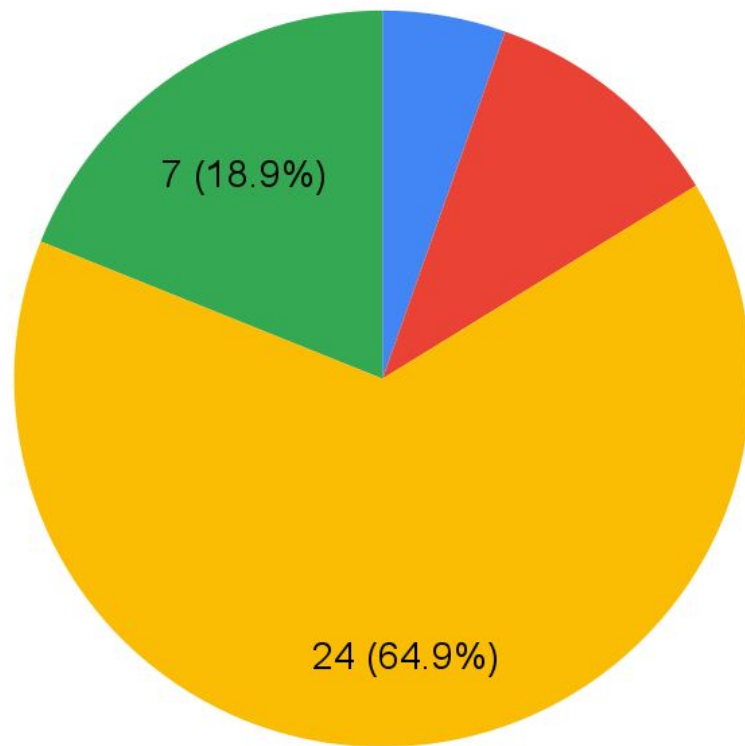
## Do you use the OpenChain ISO/IEC DIS 18974 standard for open source security assurance?

- No, we do not use it
- Not Sure



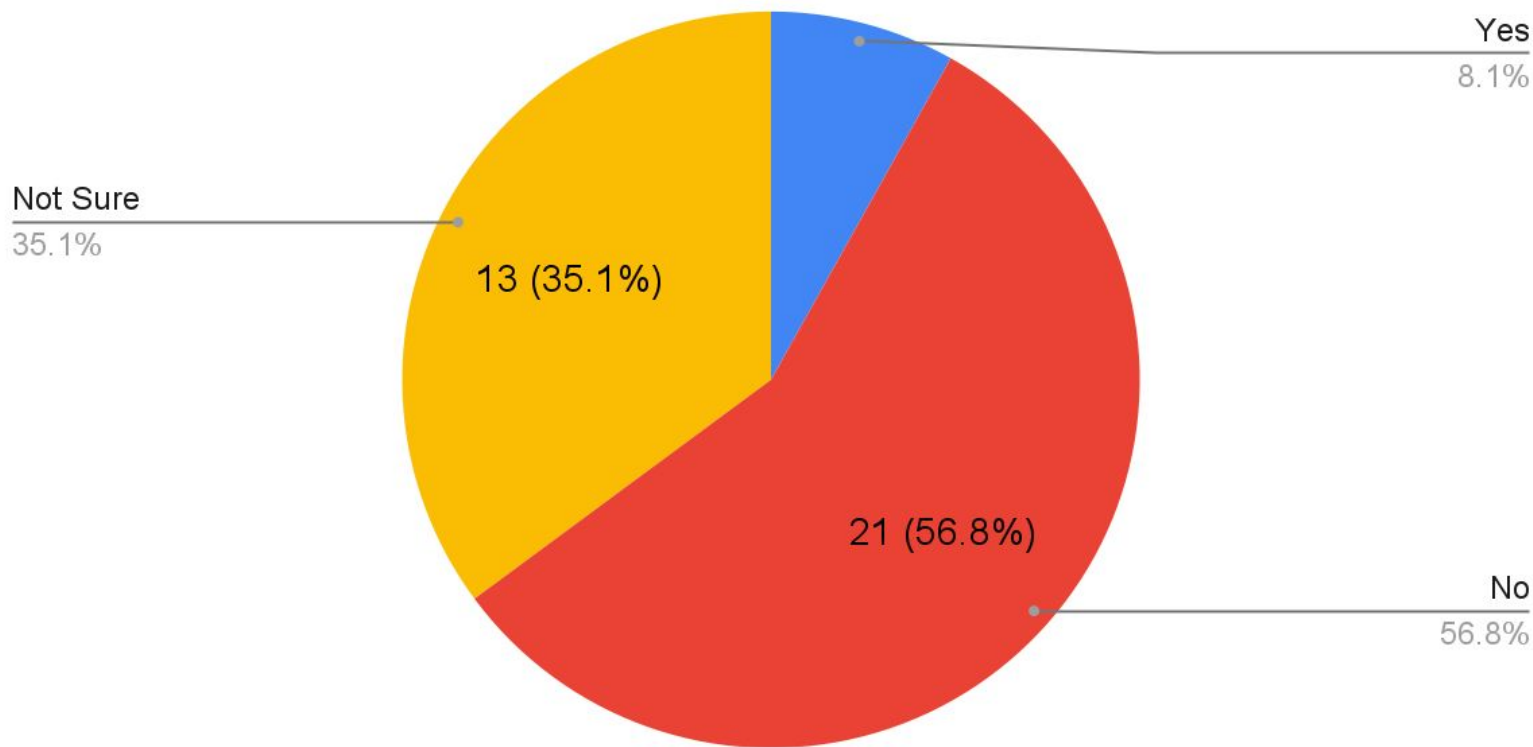
## Do you use the SPDX ISO/IEC 5962:2021 standard for software bill of materials?

- Yes, we use it for all our open source activities
- Yes, we use it for some open source activities
- No, we do not use it
- Not Sure

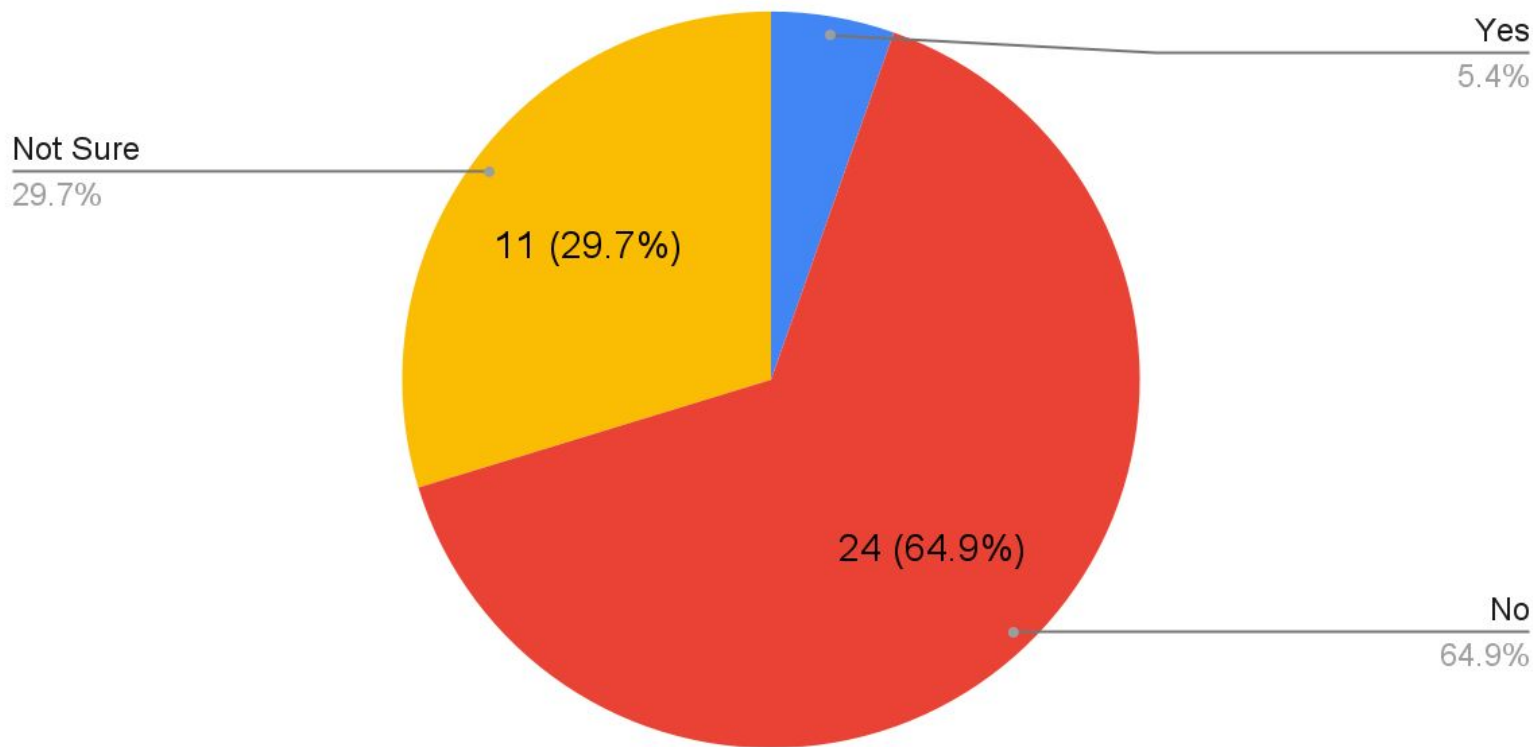




## Do you use other formal International Standards (like ISO) for open source management?

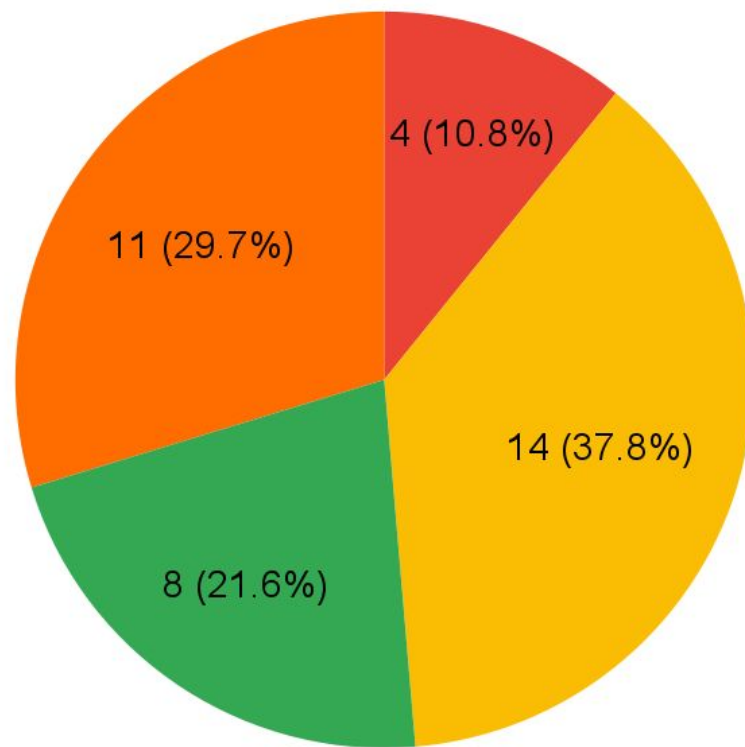


## Do you use other de-facto industry standards (like CycloneDX) for open source management?



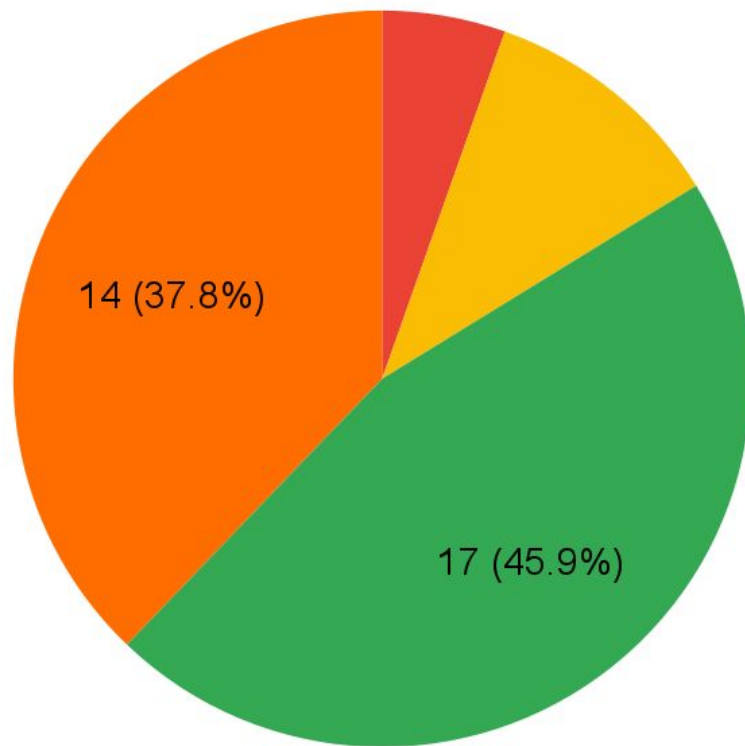
## How pervasive is ISO/IEC 5230 in your organization's supply chain?

- ISO/IEC 5230 is recommended or soon to be required
- ISO/IEC 5230 has been talked about
- ISO/IEC 5230 has never been talked about
- Not Sure



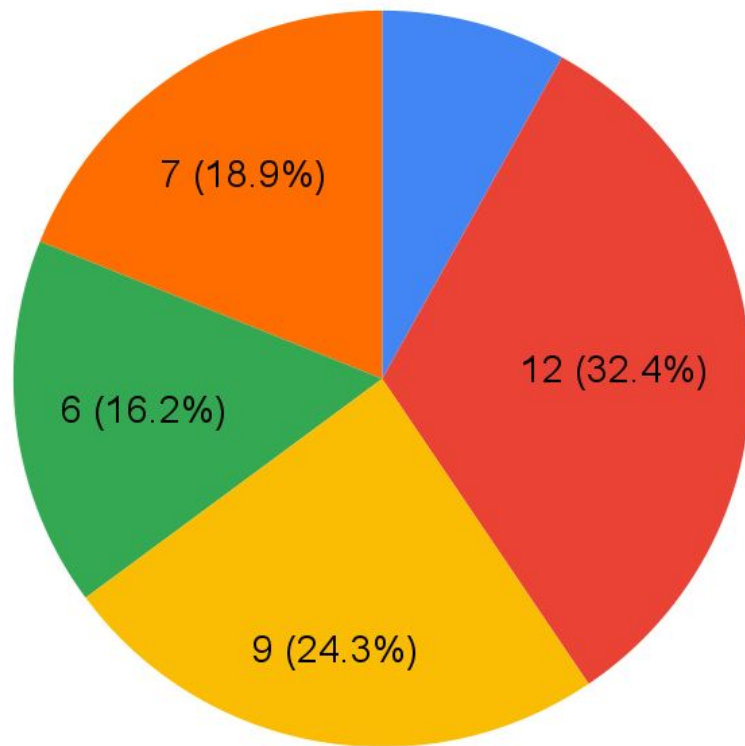
## How pervasive is ISO/IEC DIS 18974 in your organization's supply chain?

- ISO/IEC DIS 18974 is recommended or soon to be required
- ISO/IEC DIS 18974 has been talked about
- ISO/IEC DIS 18974 has never been talked about
- Not Sure

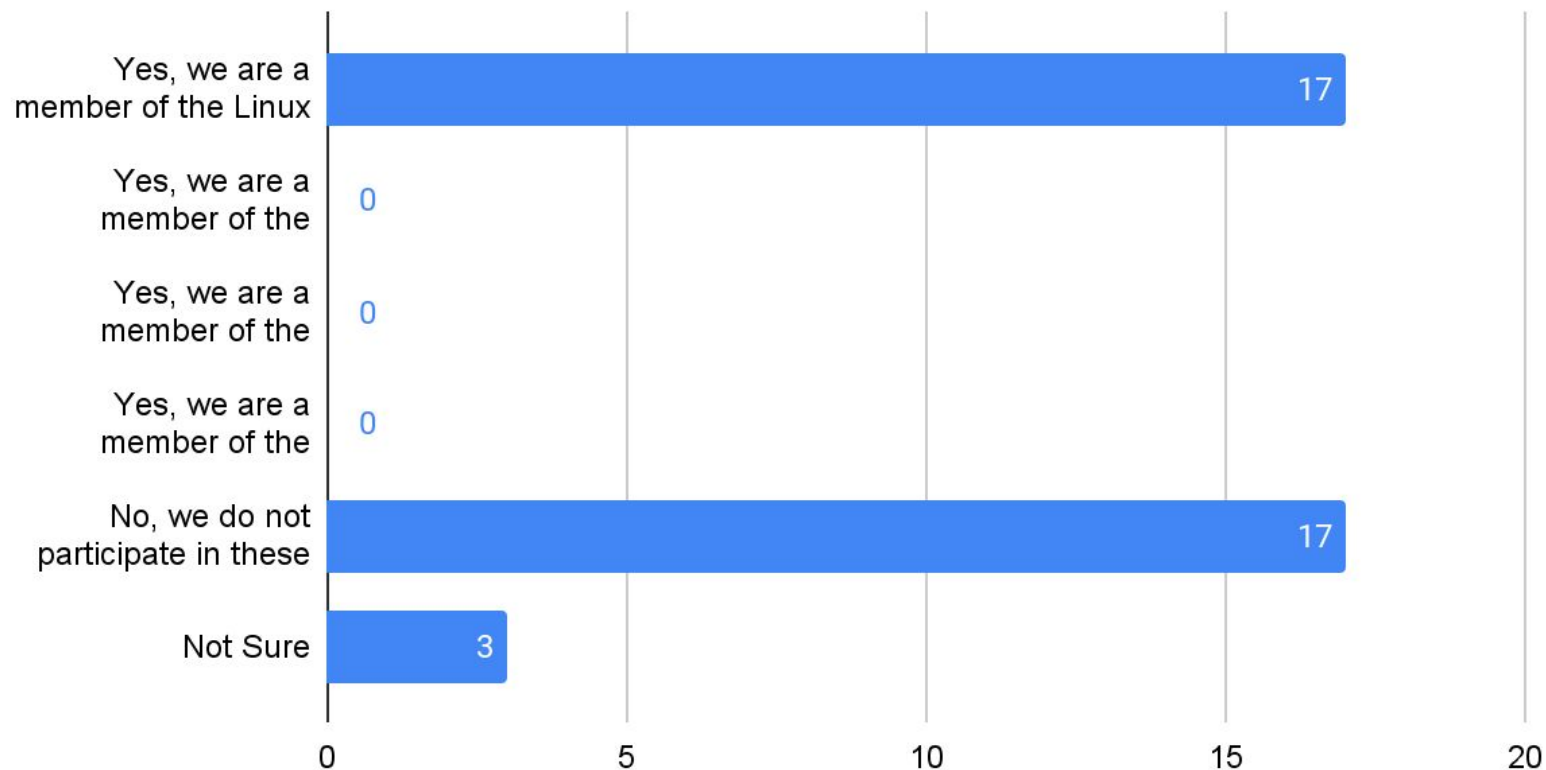


## How pervasive is Software Bill of Materials in your organization's supply chain?

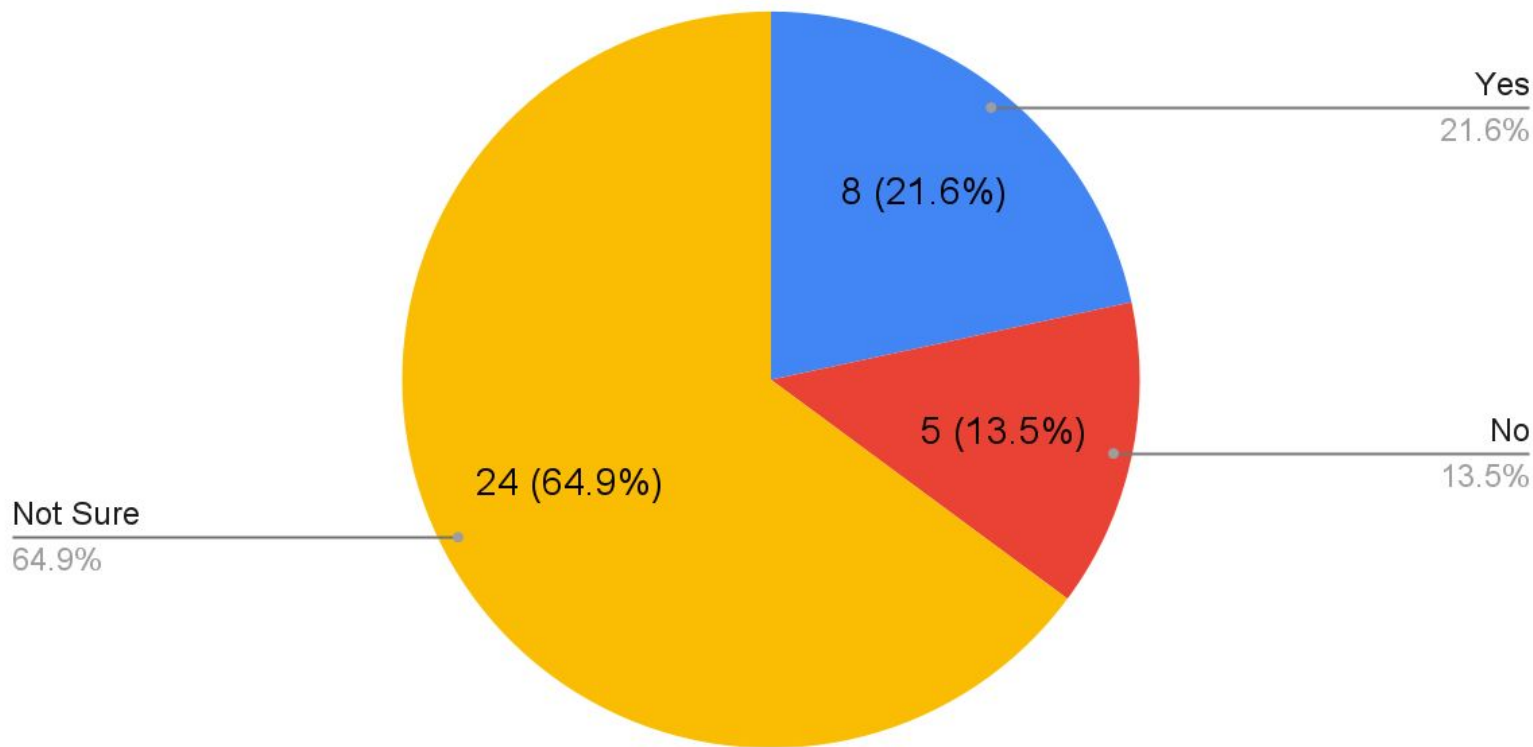
- Software Bill of Materials is required or included in procurement requirements
- Software Bill of Materials is recommended or soon to be required
- Software Bill of Materials has been talked about
- Software Bill of Materials has never been talked about
- Not Sure



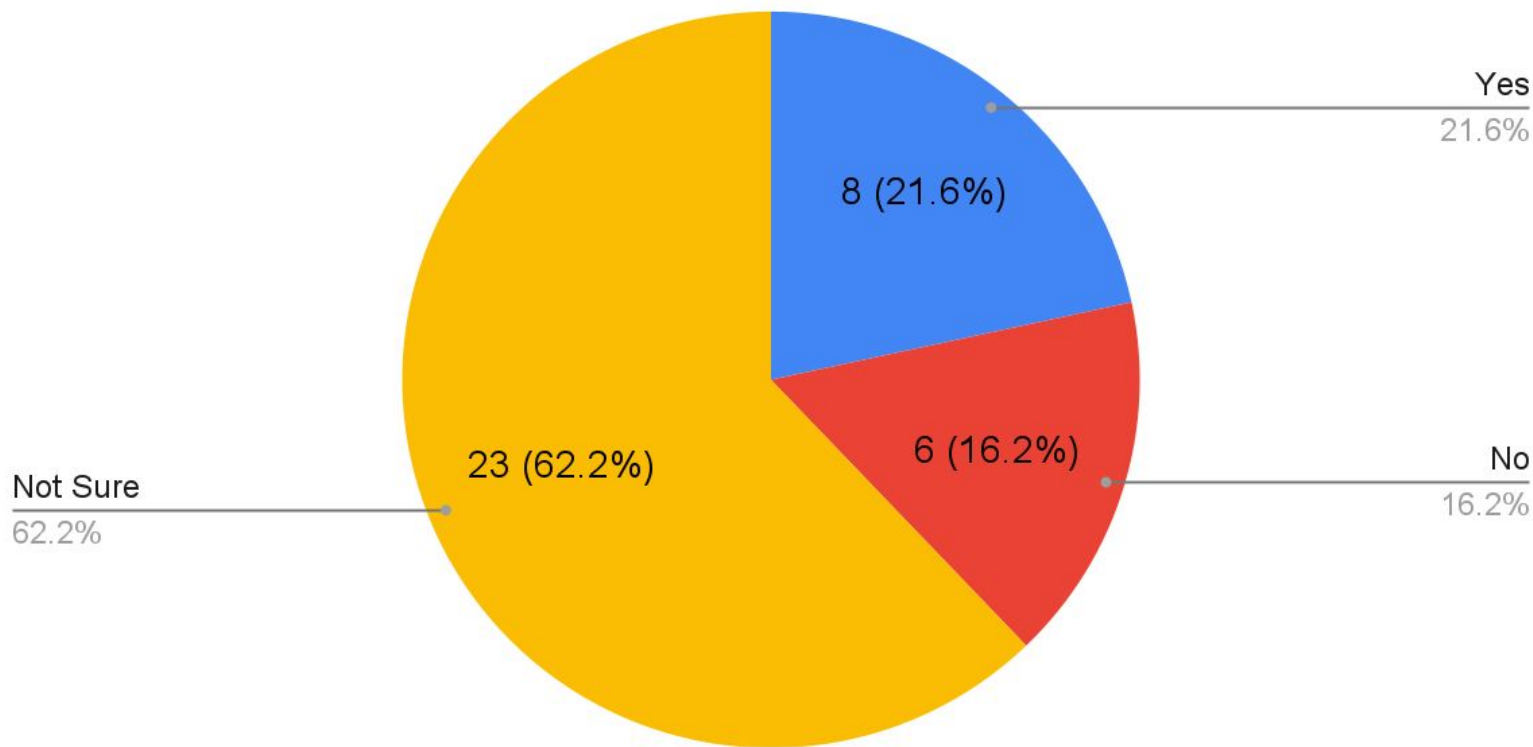
## Do you have membership in organizations promoting collaboration around open source projects?



## Has open source engagement improved your relationship with suppliers?

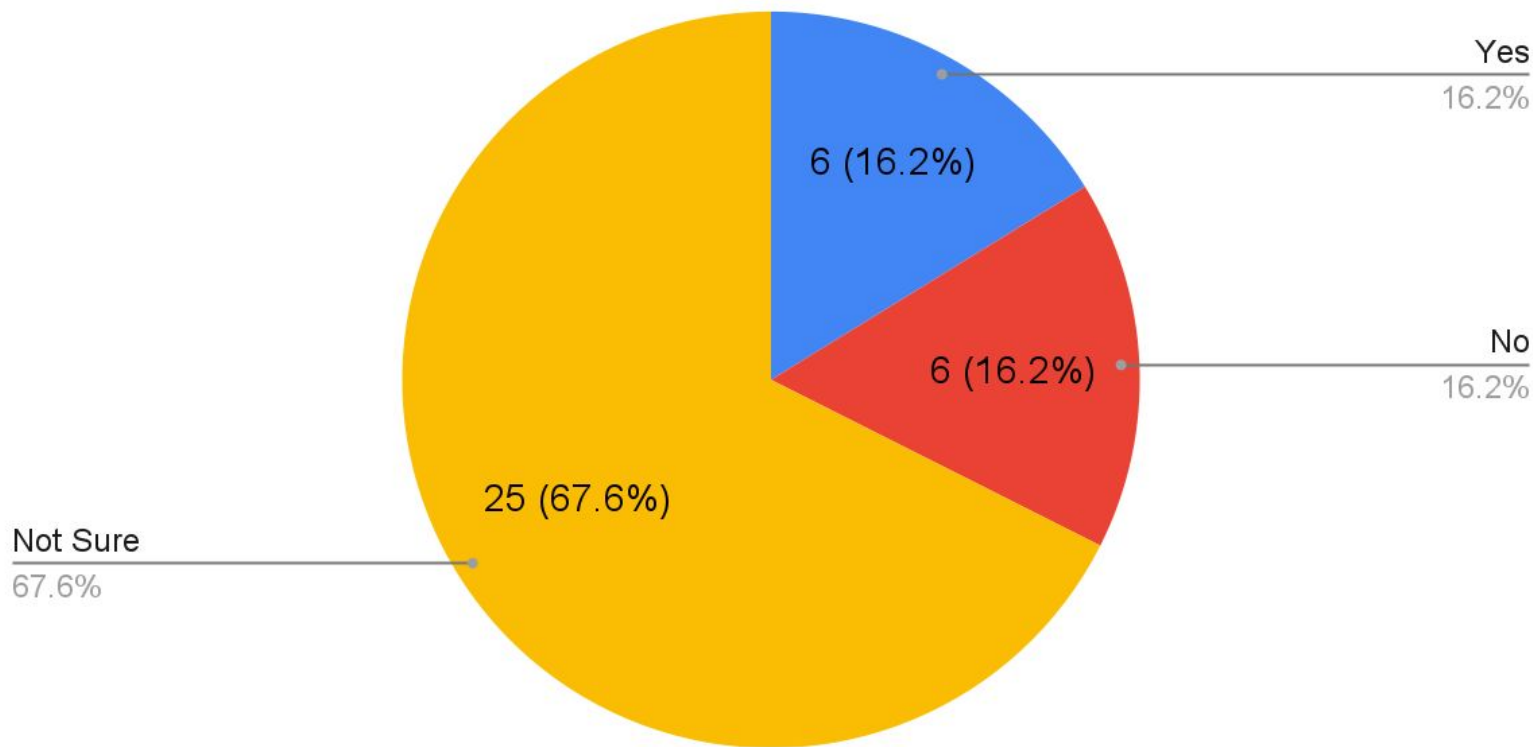


## Has open source engagement improved your relationship with customers?





## Has open source engagement improved your relationship with competitors?





**Japan workgroup**