



**Presidency of the Republic
Staff House
National Institute of Information Technology**

**FREE SOFTWARE TECHNICAL IMPLEMENTATION
CHAMBER**

**STRATEGIC PLANNING
2003 – 2004
Guidelines, Objectives and Priority Actions**

***** non-official translation *****

Brasília, October 2nd, 2003.

Table of contents

Introduction.....	3
Reference Vocabulary.....	4
Free Software Implementation Guidelines in the Federal Government.....	6
Objectives of the Free Software Technical Implementation Chamber for Years 2003-2004 and Related Indicators.....	7
Priority Actions.....	9
Institutional Acronyms.....	12

Introduction

This report presents the results of the Strategic Planning Workshop for the Implementation of Free Software at the federal government level, as discussed and approved by the Free Software Technical Implementation Chamber, coordinated by ITI – the National Institute of Information Technology of the Staff House of the Presidency of the Republic.

The workshop involved hundreds of participants from many federal government departments, providing significant representation of the different needs, points of view and difficulties related to the process.

The workshop was held at ENAP – National Public Administration School – and was coordinated by Sérgio Amadeu, ITI's director-president, and Carlos Cecconi, ITI's chief of staff. José Carlos Vaz and Newton Vagner Diniz were invited as moderators. The following members of the Brazilian free software community participated as well, as invited specialists: Anahuac de Paula Gil, Corinto Meffe, Deivi Kuhn, Elaine Silva, Gilson Schwartz, Marcelo Branco, Mário Teza, Nazaré Bretas, Ricardo Andere de Mello, Ronaldo Lages e Wagner Meira.

Reference Vocabulary

Free software – A computer program available through its source code with the permission for any user to use, copy and redistribute it, either in its original form or with modifications, either at no cost or with some [service] cost. Free software is necessarily non-proprietary, but it is importante not to confuse free software with no-cost software.

Proprietary software – A computer program distributed under a non-permissive licence, in which access to its source code is not allowed. It cannot be modified, copied or redistributed without a specific authorization of the software vendor.

Open source – A computer program in which access to its source code is allowed. This permission does not necessarily mean that it can be modified and redistributed. There are open source software licences which allow for code modification, while others do not permit it. The author's permission established in the licence agreement distributed with the software will authorize modification or not. Thus, one can say that every free software is necessarily open source software, but not every open source software is free software. The Open Source Initiative keeps a definition of open source at its site: <http://www.opensource.org>.

Source code – The code in which a computer program was originally written before being compiled and transformed into code executable by a computer. A computer program is open source software only if its executable code is distributed together with its source code.

Interoperability – Quality of a computer program or software package which permits its interaction and communication with other existing and future programs and packages. In general, interoperability is ensured when programs and application packages use open standards, developed in a colaborative way by international organizations. Examples are the HTML language, maintained by W3C, the SQL standards for database queries, and the TCP/IP protocols on which the Internet is based.

OEM (Original Equipment Manufacturer) licences – “OEM” originally has been used to designate manufacturers of components which are repackaged and distributed under other brands by integrators. Computer integrators use OEM hardware components and also proprietary OEM software licences – in this case, the original software does not lose its original identity.

GPL (General Public Licence) – A specific free software licence which covers software distributed under the GNU Project and many other distributors, including the Linux operating system kernel. GPL specifically prohibits integration of GPL software into a proprietary software package. GPL is based on international copyright law. GPL-licenced software is maintained by the Free Software Foundation, at: <http://www.fsf.org>.

Copyleft – Free software licences use copyright laws to prevent its unauthorized use, and to define clear and explicitly the conditions under which copies, modifications and redistributions can be carried out, ensuring the freedom to modificate and redistribute software under such licences. The name of “copyleft” is given to this form of copyright. See <http://www.gnu.org/copyleft>.

Open standard – Every technical standard established by international organizations or groups of companies which develop publicly available specifications. The IBM personal computer (or just PC) is an example of open standard. Internet networking specifications and most of the computer programming languages are also examples of open standards.

Open platform – A software and hardware package which adheres to open standards.

Free Software Implementation Guidelines in the Federal Government

- (1) To prioritize solutions, programs and services based on free software which promote resource and investment optimization in information technology.
- (2) To prioritize the Web platform in developing user systems and interfaces.
- (3) To adopt open standards in the development of information and communication technology, as well as multiplatform development of services and applications.
- (4) To popularize use of free software.
- (5) To expand the network of services to the citizen through free software.
- (6) To ensure to every citizen the right of access to public services without requiring them to use specific platforms.
- (7) To use free software as the foundation of digital inclusion programs.
- (8) To guarantee full system auditing and security, taking into account confidentiality and security laws.
- (9) To seek interoperability with legacy systems.
- (10) To restrict growth of legacy systems based on proprietary technology.
- (11) To carry out a gradual migration of proprietary systems.
- (12) To prioritize hardware procurement which is compatible with free software platforms.
- (13) To ensure free distribution of free software systems in a collaborative and voluntary manner.
- (14) To strengthen and share existing free software initiatives within and outside the [federal] government.
- (15) To provide incentive and support for the national market to adopt new business models based on free software information and communication technologies.
- (16) To promote conditions for changing organizational culture towards the adoption of free software.
- (17) To promote training/formation of public servants in the use of free software.
- (18) To formulate a national free software policy.

Objectives of the Free Software Technical Implementation Chamber for Years 2003-2004 and Related Indicators

OBJECTIVES	INDICATORS
A) To expand formation of technicians and public servants in the use of free software.	Number/percentile of trained servants (by department and usage type).
B) To significantly improve adherence and commitment of public servants to free software.	Satisfaction/recognition of servants regarding free software (periodic survey).
C) To develop a collaborative environment leading to expansion of free software.	Quantity, relevance and economic gain of projects developed under a collaborative model. Quantity, relevance and economic value of free software solutions made available.
D) To define and establish interoperability standards.	Percentage of institutional communication using open standards. Quantity and relevance of systems using interoperability standards which permit utilization of free software.
E) To make effective free software as a standard federal government corporate tool.	Percentage of cost savings on licencing and royalties. Percentage of new workstations using free software. Percentage of proprietary licences replaced. Percentage of workstations using OpenOffice and GNU/Linux.
F) To contain growth of legacy systems based on proprietary technology.	Percentage of equipment with non-proprietary OEM licences acquired. Percentage of systems and services developed with free software.
G) To disseminate a free software culture in schools and universities.	High-visibility projects established. Percentage of new workstations installed with free software.
H) To elaborate and establish technical and legal regulations for free software.	Steps of the regulatory agenda carried out.

OBJECTIVES	INDICATORS
I) To promote migration and adapting of as many applications and services as possible to a free software platform.	Steps of legacy migration plans carried out. Quantity and relevance of applications and servers migrated.
J) To elaborate and initiate establishment of a national free software policy.	Steps of elaboration and establishment of policy carried out.
K) To combine free software policy with a policy of incentives to industry.	Quantity and relevance of supported projects. Expansion of affected economic sectors as a result of incentives policy.
L) To significant expand supply of open source services to citizens.	Quantity and relevance of free software services offered to the public.
M) To involve the higher ranks of government in the adoption of free software.	Qualitative evaluation.

Priority Actions

ACTIONS	RELATED OBJECTIVES	PRODUCTS	ASSIGNED INSTITUTIONS
1) To provide specific training for public service technicians, support professionals and users.	A	Training program elaborated. Network of institutions in charge of implementation defined.	- CISL; - ENAP; - federal universities.
2) To organize technical online content to support training activities.	C	Courses, articles, publications, magazines made available in a reference Web portal.	- CISL; - SLTI.
3) To establish open standards for documents, ensuring information exchange.	D / E / L	Norms with standards defined.	- CISL; - SLTI.
4) To create a support group for migrating legacy proprietary systems to free software.	I / F	Group constituted with schedule of activities defined for 2004.	- CISL; - SLTI.
5) To form a group of multipliers among servants in each department.	A / B	Group constituted.	- CISL; - CGMIs from each department.
6) To create guidelines for acquisition of hardware which is fully compatible with free software.	D	Guideline document prepared.	- CISL; - SLTI.
7) To promote standards for systems integration.	D	Norm approved by December, 2004.	- CISL; -SLTI.
8) To make available tools for development of free software.	D / I	Tools catalog available by December, 2004.	- CISL; - CIS.
9) To develop applications oriented to educational and learning projects.	G	GNU/Linux distribution customized for basic public schools by December, 2004.	- CISL; - MEC.
10) To elaborate specifications for acquisition of equipment compatible with free software.	D / H / J / K	Procurement specifications prepared.	- CISL; - CSL.
11) To define the infrastructure layer for a free software platform in the electronic government architecture (interoperability, compatibility, accessibility).	D	Infrastructure layer standards defined by November, 2003 (norm).	- CISL; - CIS; - CIR.

ACTIONS	RELATED OBJECTIVES	PRODUCTS	ASSIGNED INSTITUTIONS
12) To migrate basic network services and to plan, organize, and test migration of all other services.	D / E / I	Document with recommendations and norms. Feasibility studies and migration plans.	- CISL; - CIR; - CSL; - CGMIs from each department.
13) To elaborate migration studies of the databases through laboratory tests aimed at producing a guide.	D / F / I	Database migration guide.	- CISL; - CSL; - CIS.
14) Replacement plan for the workstations to migrate current operating system and Office suite to GNU/Linux and OpenOffice.	E / F / I	Orientation document. Plans elaborated at each department.	- CISL; - CSL; - CGMIs from each department.
15) To create a unified promotional campaign for dissemination, clarification and adoption of free software by the federal government.	B / K / M	Visual identity, printed material, electronic media, audiovisuals, use of institutional information vehicles, contest to develop free software solutions.	- CISL; - SECOM-PR.
16) To create the federal government's free software Web portal (www.softwarelivre.gov.br).	C / B / I / L	Portal with information, news, links, downloadable material, forums, lists, distance education tools (training), experiences of other governments, national initiatives.	- CISL.
17) To carry out a forum on systems development using free software and free documentation.	B / C / D / I	Electronic forum on systems development using free software. Tentative date: October, 2003.	- CISL.
18) To create a government's national annual free software event.	B / M	Event carried out.	- CISL.
19) To create itinerant events for awareness-raising.	B / M	Events' schedule.	- CISL.
20) To define a national annual events calendar to be supported by the federal government.	B / M	Events' schedule.	- CISL.
21) To elaborate a national plan to demonstrate use and interaction with free software.	B / M	Plan elaborated.	- CISL.

ACTIONS	RELATED OBJECTIVES	PRODUCTS	ASSIGNED INSTITUTIONS
22) To identify and mobilize a group of opinion-makers at the higher ranks of the government.	M	Group mobilized.	- CISL.
23) To include free software in the meetings' agendas at the higher levels of the federal government.	M	Meetings scheduled and themes defined.	- CISL.
24) To elaborate requirement standards favorable to free software, to be included in tendering and contracting processes of the public administration.	H / J / K	Set of norms.	- CISL; - AGU; - MP; - TCU.
25) To elaborate requirement standards which create favorable conditions to the use of free software in obtaining resources from funds, financing contracts and incentives programs.	K / J	New criteria for obtaining resources from funds, financing contracts and incentives programs.	- CISL; - MF; - MCT; - MiniCom; - BNDES; - CEF; - BB.
26) To redirect public funds to free software.	K / J	Sectoral funds for free software.	- CISL; - MCT; - MiniCom; - MdIC.
27) To organize a network of partners (within and outside the government) for capacity building, research, development and tests on free software.	A / C / H	New qualification programs.	- CISL; - MCT; - FAT; - ENAP; - Universities, R&D departments.
28) Policy to support exporting of free software.	K / J	Policy formulated.	- CISL; - MRE; - MdIC; - MCT.
29) To develop contests with prizes to stimulate free software development.	B	Contest regulations defined.	- CISL; - SECOM-PR; - MCT; - MEC.

Institutional Acronyms

AGU – Advocacia Geral da União (General Attorney of the Union)

BB – Banco do Brasil (Bank of Brazil)

BNDES – Banco Nacional de Desenvolvimento Econômico e Social (National Bank of Economic and Social Development)

CEF – Caixa Econômica Federal (Federal Savings Bank)

CIS – Câmara Técnica de Integração de Sistemas (Chamber on Systems Integration)

CISL – Câmara Técnica de Implementação do Software Livre (Free Software Technical Implementation Chamber)

CIR – Câmara de Infra-estrutura de Redes (Network Infrastructure Chamber)

CGMI – Coordenação-Geral de Modernização e Informática (General Coordination of Modernization and Informatics)

CSL – Câmara de Sistemas e Licenças (Systems and Licences Chamber)

ENAP – Escola Nacional de Administração Pública (National Public Administration School)

FAT – Fundo de Amparo ao Trabalhador (Worker's Support Fund)

MCT – Ministério da Ciência e Tecnologia (Ministry of Science and Technology)

MEC – Ministério da Educação (Ministry of Education)

MdIC – Ministério da Indústria e Comércio (Ministry of Industry and Trade)

MF – Ministério da Fazenda (Ministry of Finance)

MiniCom – Ministério das Comunicações (Ministry of Communications)

MP – Ministério Público (Public Prosecutor Office)

MRE – Ministério das Relações Exteriores (Ministry of Foreign Relations)

SECOM-PR – Secretaria de Comunicação da Presidência da República
(Communication Secretariat of the Presidency of the Republic)

SLTI – Secretaria de Logística de Tecnologia de Informação (Secretariat of
Logistics of Information Technology, Ministry of Planning)

TCU – Tribunal de Contas da União (Accounts Tribunal of the Union)