

Mars 2005

Rapport Final Version #1
pour révision à distribution restreinte

Carte Stratégique (Roadmap) 2005 – 2015

**MDERR secteur des
logiciels et multimédia**

**Préparé par :
SHS Technologies**



Table des matières

1.0	Introduction	1
1.1	Objectif	1
1.2	Méthodologie	1
1.3	Structure du rapport	1
2.0	Descriptive Fiches for each creneaux	2
2.1	Software Creneaux	2
2.1.1	Infrastructure Software (Manufacturier)	2
2.1.2	Software for Development (Language)	4
2.1.3	Software Vertical Applications (Sante)	5
2.2	Multimedia Software	7
2.2.1	Animation – Games 2D 3D	7
2.2.2	E-Learning	8
2.3	Creneaux Evaluation and Selection – for Roadmap	9
2.3.1	Selected Software Creneaux	9
2.3.2	Selected Multimedia Creneaux	9
3.0	Logiciels Sector	10
3.1	Technologies langagières	10
3.1.1	État actuel	12
3.1.2	Technologies futures et tendances du marché	14
3.1.3	Entreprises québécoises en traitements langagiers	16
3.2	Informatisation de la santé	18
3.2.1	Current Status	18
3.2.2	Future Technology & Market Trends	19
3.2.3	Sante Applications Industry in Quebec	21
3.3	Logiciels manufacturiers	22
3.3.1	Current Status	25
3.3.2	Future Technology & Market Trends	28
3.3.3	Logiciels manufacturiers industry in Quebec	30
3.4	Development Scenarios - Logiciels	32
3.4.1	Development Scenario – Language technologies	32
3.4.2	Development Scenario – Informatisation de la santé	33
3.4.3	Development Scenario – Logiciels manufacturier	34
4.0	Multimedia Sector	35
4.1	Jeux et animation	35
4.1.1	État actuel	37
4.1.1.1	Animation 2D/3D	37
4.1.1.2	Jeux vidéo	38
4.1.2	Technologies futures et tendances du marché	41
4.1.2.1	Animation 2D/3D	41
4.1.2.2	Jeux vidéo	42
4.1.3	Entreprises québécoises d’animation 2D/3D et de jeux	43
4.1.3.1	Animation 2D/3D	43
4.1.3.2	Jeux vidéo	44
4.2	Development Scenario – Animation 2D/3D et jeux vidéo	45

5.0 Software & Multimedia – New Initiatives	46
5.1 TIC Decision Support Systems	46
5.1.1 Objective	47
5.1.2 Drivers (Market & Technology)	47
5.1.3 Proposed Action Plan	47
5.1.4 Industry Decision Support System - Roadmaps	49
5.2 TIC Commercialization Support	51
5.2.1 Objective	51
5.2.2 Drivers (Market & Technology)	51
5.2.3 Proposed Action Plan	52
5.2.4 R&D Support for Commercialization - Roadmaps	52
5.3 TIC Software Development Initiative	54
5.3.1 Objective	54
5.3.2 Drivers (Market & Technology)	55
5.3.3 Proposed Action Plan	55
5.3.4 Software Development Initiative - Roadmaps	55
5.4 TIC Partnership Action Plan	57
5.4.1 Objective	57
5.4.2 Drivers (Market & Technology)	58
5.4.3 Proposed Action Plan	58
5.4.4 Quebec Partnership Action Plan - Roadmaps	58
5.5 TIC Employee Retention Action Plan	61
5.5.1 Objective	61
5.5.2 Drivers (Market & Technology)	61
5.5.3 Proposed Action Plan	61
5.5.4 Employee Retention Action Plan - Roadmaps	61
5.6 TIC IP Conversion Action Plan	63
5.6.1 Objective	63
5.6.2 Drivers (Market & Technology)	63
5.6.3 Proposed Action Plan	64
5.6.4 TIC IP Conversion Action Plan - Roadmaps	64
6.0 Additional Action Plans for Logiciels & Multimedia	67
6.1 Logiciels Sector	67
6.1.1 MPUA SGF Investment Project	67
6.1.2 Pilot “santé” projects	67
6.1.3 Knowledge/Content Management SGF Investment Project	67
6.1.4 Logiciels Manufacturier	67
6.1.5 Logiciels Manufacturier	67
6.1.6 Partnerships – Logiciels Manufacturier	67
6.1.7 Government-on-line (E-Government)	68
6.1.8 Dialogue with the governmental partners	68
6.1.9 New Investments in Software Industry	68
6.2 Multimedia Industry	68
6.2.1 E-Learning SGF Investment Project	68
6.2.2 Games Development Assistance	68
6.2.3 Animation Tools – Standards	68
6.2.4 Dialogue with the governmental partners	69
6.2.5 New Investments in Multimedia Industry	69

7.0 Projets d'investissement (SGF)	70
7.1 MPUA (Medical Practice Universal Automation) Project	70
7.1.1 Introduction & Overview	70
7.1.2 Future Healthcare Scenario	75
7.1.3 Proposed Project	76
7.1.3.1 Objective	76
7.1.3.2 Requirements - Identified Healthcare IT needs	76
7.1.3.3 Implementation – Phase 1 & 2	77
7.1.3.4 Further Potential Phases (3 & 4)	78
7.1.3.5 Potential Partners - Phases 1 & 2	79
7.1.3.6 Potential Partners – Phases 3 & 4+	79
7.1.3.7 Recommendations	80
7.2 E-Learning (e-CRO, e-CMO & e-CXO)	80
7.2.1 Introduction & Overview	80
7.2.2 Proposed Project	82
7.2.2.1 Project Development	83
7.2.2.2 Potential Partners	85
7.2.2.3 Investment – Steps to be taken	86
7.2.2.4 Recommendations	86
7.3 Knowledge/Content Management: Homeland Security & Business Intelligence market	87
7.3.1 Introduction & Overview	87
7.3.2 Challenges and Perspective of Knowledge Management	91
7.3.3 Proposed Project	92
7.3.4 Steps to be taken	94
7.3.5 Investment	95
7.3.6 Recommendations	95
8.0 Conclusions & Recommendations	96
8.1 Program Summary	96
8.2 Recommendations	97
Annex "A"	98

Figures

1	Knowledge Management Hierarchy	11
2	Définition du créneau (suite)	12
3	Logiciels manufacturiers ERP & MES	23
4	ERP-ECM Convergence	28
5	Development Scenario – Language technologies	32
6	Development Scenario – Informatisation de la santé	33
7	Development Scenario – Logiciels manufacturier	34
8	Marché global par type de plate-forme	38
9	Portion des ventes de consoles par fabricants	39
10	Part du marché global par continent	40
11	Development Scenario – Animation 2D/3D et jeux vidéo	45
12	TIC Roadmap-Action Plan	46
13	TIC Industry Decision Support System - Roadmap	49
14	TIC Industry Decision Support System – Action Plan	50
15	TIC Industry Decision Support System – Action Plan	50
16	TIC Industry Decision Support System – Action Plan Implementation	51
17	TIC Commercialization Support - Roadmap	52
18	TIC Commercialization Support Action Plan-1	53
19	TIC Commercialization Support Action Plan-2	53
20	TIC Commercialization Support Action Plan - Implementation Roadmap	54
21	TIC Software Development Initiative - Roadmap	56
22	TIC Software Development Initiative	56
23	TIC Software Development Initiative - Implementation	57
24	TIC Partnership Action Plan - Roadmap	58
25	TIC Partnership Action Plan -1	59
26	TIC Partnership Action Plan - 2	59
27	TIC Partnership Action Plan – Implementation	60
28	TIC Employee Retention Action Plan - Roadmap	62
29	TIC Employee Retention Action Plan	62
30	TIC Employee Retention Action Plan–Implementation	63
31	TIC IP Conversion Action Plan - Roadmap	64
32	TIC IP Conversion Action Plan – 1	65
33	TIC IP Conversion Action Plan – 2	65
34	TIC IP Conversion Action Plan – Implementation	66
35	SGF Proposed Projects	70
36	MPUA – Roadmap	77
37	MPUA - Project Implementation	78
38	Traditional Drug Development Process	82
39	e-CRO / e-CMO – Roadmap	83
40	e-CRO / e-CMO Implementation Plan	84
41	E-Business Support Interface	85
42	The Historical Perspective – Departmental Document Management	87
43	The Historical Perspective – Enterprise ECM Implementation	88
44	The Historical Perspective – Enterprise ECI Integration – 1	89
45	The Historical Perspective – Departmental ECI Integration - 2	90

Tables

1	Fiche - Infrastructure Software	2
2	Fiche - Software for Development (Language)	4
3	Fiche - Software Vertical Application (Santé)	5
4	Fiche - Animation - Games 2D 3D	7
5	Fiche - E-Learning	8
6	Entreprise gestion et accès à l'information	16
7	Entreprise traitement de l'information textuelle	17
8	Entreprise traitement de l'information vocale	18
9	Software Trends – Logiciels Manufacturier	27
10	Quebec – Companies: Manufacturing Software	31
11	Decision Support System – Company Data Template	48
12	Clinical Trials	81