



AFDEL & the European Software Association announce the launch of the

## “European Software vendors PAC/AFDEL Index “

Brussels, 28 November 2006 –

***The European Software Association (EuSftwAssn) & AFDEL (French Association of Software Editors) joined forces in the launch of the “European Software vendors PAC/AFDEL Index “. This initiative is a first step of the cooperation both associations intend to develop to the better of the European software industry. The Index provides to decision makers an original and relevant overview of the market position of European software vendors (Top 200). The survey highlights equally their strengths and weaknesses, particularly on the worldwide market (Top 20).***

### **-Stakes and challenges for European Software vendors-**

This survey made by Pierre Audoin Consultants for AFDEL underlines that, with nearly €50,000 million in 2005, the European market represented approximately 30% of the worldwide market.

When studying the Top 200 software vendors present in the European market, it is clear that American software vendors are omnipresent (73 in the Top 200, 53 in the Top 100, and 8 in the Top 10), thanks in particular to their positioning on software infrastructure tools.

The three other large countries are, in order: Germany (12%), the UK (5%), and France (5%). Germany's position is unique, as it includes the worldwide leader in enterprise applications, SAP, which represents 69% of Germany's weight in the Top 200.

### **- EuSftwAssn and AFDEL strengthened their cooperation-**

This initiative is part of the new dynamic launched between the two associations. AFDEL was indeed accepted by the EuSftwAssn as Network Software Partner and will as such take part in the National Software Association Liaison Committee together with two other national dedicated software Associations, Assoft from Portugal and the Irish Software Assn.

*“The European Software Association intends to work very closely with the Liaison Committee to be able to voice even better the concerns and the realities of the European software industry, close relationships with national antenna's is key to do this effectively”, underlines Jeremy Roche, chairman of the European Software Association.*

*“This new dynamic is very good news for this industry, a growth and innovation driver, but one that is increasingly played out on a global scale. Created just one year ago, both associations aimed to strengthen the Software industry and have proved their ability to reveal its contribution as a major factor of development in our economy.” added Patrick Bertrand, Chairman of French Association of Software Editors.*

Meeting in Helsinki on November 22 on the occasion of the European Commission's yearly IST event, the European Software Assn board confirmed strategic initiatives which it believes will support the development of the European software industry by concentrating actions on access to European R&D funding, guidance on appropriate IPR protection, ensuring a large enough pool of IT professionals by engaging with the academic community and establishing links with European institutions to making the voice of the European software industry heard. Concrete sources of interest to European software SMEs expanding across Europe will be developed. In addition, on a regular basis industry events will unite members as well as national software & IT representatives to exchange knowledge and experiences.

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**About the European Software Association**

The European Software Association was created on 19 October 2005 and represents European Independent Software Vendors. Current members include: 1C (Russia), Bizitek (Turkey), Business Objects S.A. (France), CCS, S.A. (Spain), CEGID (France), CODA Group (UK), Coretech (Turkey), Dassault Systèmes (France), Fenestrae B.V. (The Netherlands), Hogia AB (Sweden), KTW (Austria), Lexware GmbH & Co. KG (Germany), LogicaCMG (The Netherlands), Logo Yazilim A.S. (Turkey), Mamut ASA (Norway), Microsoft (France), msg systems ag (Germany), Northgate Information Solutions (UK), Oracle Corporation, Sage Group plc (UK), SAP (Germany), Selligent (Belgium), S.C. Info World S.R.L. (Romania), SkyRecon Systems (France), Totalsoft (Romania), Unicom (Czech Republic), Unit 4 Agresso (The Netherlands), Update Software AG (Austria), Version One (UK), @Road (UK).

**About AFDEL**

Created in October 2005, AFDEL is the French association of Software editors. With 80 members (<http://www.afdel.fr/membres-afdel.html>), AFDEL aims to represent the whole industry from big firms to SME's (80%). Six commissions dedicate their work on strategic subjects for editors as IP, International development, Public markets, Benchmarking, Best practises, Investment.... The Association is a European Software Association (ESA) partner. Press contact: [mle@wellcom.com](mailto:mle@wellcom.com)

**About PAC**

Pierre Audoin Consultants (PAC) is the leading European market research and strategic consulting firm for the Software and IT Services Industry (SITSI). We advise IT companies on developing successful end-to-end growth strategies in Europe and in the U.S. through planning, development, implementation, and ongoing support. This is done through market analyses as well as consulting engagements. Headquartered in Paris, we have been supporting over 300 clients worldwide for 30 years. We manage our clients through a specialised local network with subsidiaries in Munich, New York, London and Bucharest. For more information please visit our website at <http://www.pac-online.com>

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