

OPEN INFRASTRUCTURE: WHAT'S BEHIND THE \$8.8 TRILLION USD MARKET



THIERRY CARREZ
GENERAL MANAGER
OPENINFRA FOUNDATION

WE BUILD OPEN SOURCE SOFTWARE FOR INFRASTRUCTURE



STRATEGIC PARTNERS

Platinum Members



Gold Members



ALIGNED ORGANIZATIONS

Silver Members



**110,000
COMMUNITY
MEMBERS**

**USERS
DEVELOPERS
ECOSYSTEM**

TOGETHER, WE BUILT



openstack.®

600,000+ CODE CHANGES

**~10,000 CONTRIBUTORS
FROM HUNDREDS
OF ORGANIZATIONS**

**ONE OF THE MOST
ACTIVE OPEN SOURCE
PROJECTS IN THE
WORLD**





OSS DEMAND =

\$8.8 TRILLION USD

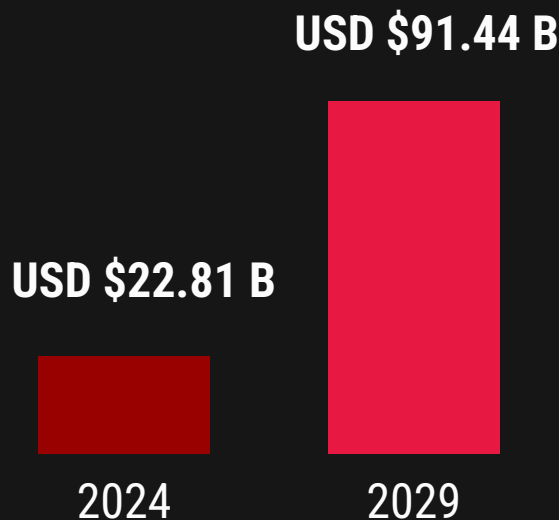
New Harvard study finds Open Source is worth up to \$8.8 trillion

"Any time you spend on building that software to operate is time taken away from building the services that customers really want and will pay for. Open source software helps companies get to their goals faster..."



EXPONENTIAL OPENSTACK MARKET GROWTH

**OPENSTACK
SERVICES MARKET**
Market Size
in USD Billion CAGR **32.01%**

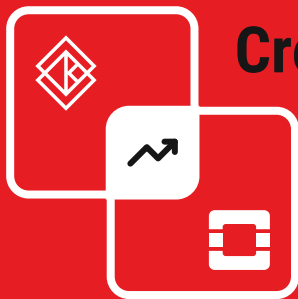


Source: Mordor Intelligence



4 TRENDS DEFINING

NEXT GENERATION → INFRASTRUCTURE



Creating massive demand for

**OPENSTACK, KATA CONTAINERS
and all Open Source Infrastructure Software**

1

DIGITAL SOVEREIGNTY

2

3

4



1 DIGITAL SOVEREIGNTY



1 DIGITAL SOVEREIGNTY → OPEN SOURCE RESPONSE

↓ PUBLIC CLOUDS



300+ PUBLIC CLOUD
DCS BASED ON



↓ PRIVATE CLOUDS



FRANCE'S BIGGEST
BANKS RUN ON



1

DIGITAL SOVEREIGNTY

2

LICENSING RUGPULLS

3

4



2

LICENSING RUGPULLS

Redis shifts to dual source-available licensing model

CSPs hosting Redis solutions will now be required to enter into commercial agreements

Home » Software » Virtualization » VMware VCSP Customers Seeing 10x or More Cost Increases Under Broadcom

Software Virtualization

VMware VCSP Customers See 10x or More Cost Increases Under Broadcom

By Patrick Kennedy - February 19, 2024

Elastic changes software license to better protect Elasticsearch and Kibana

Latest News Published: January 20th, 2021 - Christina Cardoza

SDTimes SOFTWARE DEVELOPMENT

ars TECHNICA

LEGAL DISPUTE CONTINUES

“Extreme” Broadcom-proposed price hike would up VMware costs 1,050%, AT&T says

Broadcom "preventing some vendors from selling products to us," AT&T alleges.

SCHARON HARDING - OCT 1, 2024 11:22 AM



2

LICENSING RUGPULLS → OPEN SOURCE RESPONSE

OVER 80%

OF OPENINFRA MEMBERS
HAVE HAD **CUSTOMERS**
INQUIRE ABOUT MOVING
FROM VMWARE TO
OPENSTACK

OVER 60%

OF OPENINFRA MEMBERS
HAVE ALREADY MIGRATED
A CUSTOMER FROM VMWARE
TO AN OPENSTACK-BASED
PRODUCT

2

LICENSING RUGPULLS → OPEN SOURCE RESPONSE



GEICO'S SUCCESSFUL EXPERIENCE

- 2nd largest auto insurer in the US
- \$32 billion USD in assets
- 40,000+ employees

GEICO
RUNS ON



SCAN THE QR CODE TO
READ THE WHITE PAPER



1 DIGITAL SOVEREIGNTY

2 LICENSING CHANGES

3 SECURITY CONCERNS

4



3 SECURITY CONCERNS

DR Tech | ⌚ 4 MIN READ 📄 DR TECHNOLOGY

87% of Container Images in Production Have Critical or High-Severity Vulnerabilities

FORBES > INNOVATION

The Importance Of Runtime Security For Cloud Environments

3

SECURITY CONCERNS → OPEN SOURCE RESPONSE



SECURES AZURE
WITH KATA



katacontainers



SECURES GPU
WITH KATA

THE NEW STACK

CLOUD SERVICES / KUBERNETES / SECURITY

Microsoft Adopts OpenInfra Containers Security on Azure

Microsoft's customers want more security on Azure, so Microsoft containers to deliver it to them.



Containers

Enhancing Kubernetes workload isolation and security using Kata Containers

by Mirash Gjolaj and Re Alvarez-Parmar | on 16 MAY 2024 | in [Containers](#), [Technical How-to](#) | [Permalink](#) | [Share](#)

Containers have become the dominant method for deploying and managing applications in recent years. Their widespread adoption is attributed to numerous advantages, such as isolation, efficient



Search docs

NVIDIA GPU OPERATOR

About the Operator

NVIDIA
GPU

GPU Operators with Kata
Containers

- > About the Operator with Kata Containers
 - > About NVIDIA Kata Manager
 - > NVIDIA Kata Manager Configuration
- > Benefits of Using Kata Containers
- > Limitations and Restrictions

1 DIGITAL SOVEREIGNTY

2 LICENSING CHANGES

3 SECURITY CONCERNS

4 AI REDEFINING INFRA



4 AI IS REDEFINING CLOUD DATA CENTER INFRASTRUCTURE

FORRESTER

**Your Cloud Strategy Is Now
Your AI Strategy, Too**

EE|Times

DESIGNLINES | AI & BIG DATA DESIGNLINE

**Accelerated Infrastructure Simply the Next
Evolution of Data Center Infrastructure**

4 AI IS REDEFINING CLOUD DATA CENTER INFRASTRUCTURE

“THE INSTALLED BASE OF DATA CENTERS
WILL **DOUBLE TO \$2 TRILLION** FROM THE
EXISTING \$1 TRILLION...

ALL OF THESE DATA CENTERS WILL BE
‘ACCELERATED’”



JENSEN HUANG



4

AI → OPEN SOURCE RESPONSE

UK'S FASTEST
SUPERCOMPUTER
RUNS ON



Smart Cloud

VIETNAMESE
BANKS RELY ON



**UK bets on Intel CPUs and GPUs,
Dell boxen, OpenStack for Dawn
supercomputer**

FPT AI eKYC serves identity updates
for Vietnamese banks by scanning
customers' ID cards. For scale, there
are more than 1M requests per day and
often up to 10,000 requests per minute

A GREAT **OPPORTUNITY** FOR OPENINFRA

1 **DIGITAL SOVEREIGNTY**

2 **LICENSING RUGPULLS**

3 **SECURITY CONCERNS**

4 **AI REDEFINING INFRA**



**TRILLION DOLLAR
INFRASTRUCTURE
MARKET
OPPORTUNITY**



BUT ALSO A LOT OF CHALLENGES

CHALLENGES TO OPEN SOURCE
DEVELOPMENT MODEL



TRILLION DOLLAR
INFRASTRUCTURE
MARKET
OPPORTUNITY

GEOPOLITICAL
UNCERTAINTY



INCOMING REGULATIONS
ON ALL SOFTWARE



STEPPING UP TO MEET THE OCCASION

ENGAGING IN EU POLICY

- CREATING AND GROWING OPENINFRA EUROPE
- PROVIDING FEEDBACK ON PROPOSED REGULATION
- JOINING THE OPEN REGULATORY COMPLIANCE WG
- COORDINATING WITH OPENFORUM EUROPE



STEPPING UP TO MEET THE OCCASION

OPENINFRA JOINING FORCES WITH LINUX FOUNDATION

- COLLABORATING CLOSELY WITH CNCF
- PROMOTING THE OPENINFRA BLUEPRINT
- REINFORCING FINANCIAL SUPPORT AND GROWING NEW PROJECTS
- LEVERAGING LF EXPERIENCE IN POLICY, TRAINING AND RESEARCH





OpenInfra

SUMMIT > EUROPE'25



GERRIT USER SUMMIT

VM MIGRATION DAY

KUBERNETES

OPENSTACK

LINUX

STARLINGX

KATA CONTAINERS

ZUUL

CEPH

GERRIT

Paris-Saclay, France

17–19 October 2025

- REGISTRATION & SPONSORSHIP OPPORTUNITIES AT SUMMIT2025.OPENINFRA.ORG
- CFP CLOSES JUNE 13 !



JOIN US!

