

Revision History

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1 General Information

1.1 Initiative Name

Initiative
OW2 BI Initiative

1.2 Initiative Contact Person

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1.3 Quick Description

The BI Initiative aims at fostering the growth of a business ecosystem in the Business Intelligence domain bringing business opportunities to new-class stakeholders.

The BI Initiative aims as well at providing:

- A new BI experience:
 - driven by end-users needs,
 - supported by a new generation of BI infrastructure,
 - providing a new market approach;
- A Business Intelligence qualification:
 - promoting actual OW2 technologies bringing them to the mainstream,
 - building up by new technologies, new open source components, adopting open standards,
 - providing periodical reports, white papers, benchmark, real-world use-cases;
- Alternative business and technology break-through drivers:
 - open development activities,
 - an open supply chain,
 - a wider participation to achieve a significant dimension and authoritative position,
 - a collaborative approach and a co-authoring method.

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2 Initiative Purpose

2.1 Initiative Background

The continuing growth of data and complex business environments keep driving business intelligence forward. In the IT domain, BI is a healthy market with constant convergence and innovation. Till the end of 2004 only proprietary solutions of few big players could support the implementation of BI software projects as well as few open source solutions covering only specific aspects (e.g: reporting, OLAP). Starting from 2005, SpagoBI project, an innovative solution in the OS domain, has filled the gap creating an unified platform supporting all the needs of the BI analytical aspects. By including SpagoBI in ObjectWeb, the consortium complemented its middleware stack for the enterprise with a business intelligence layer. SpagoBI project is now aggregating both several OW projects (like eXo Platform and Talend) and non-OW projects and joins together OS companies in order to deliver support services to the OS solutions. There is a great interest in SpagoBI not only in Europe but, according to the SpagoBI download statistics, this is spread worldwide with a particular presence in the emerging IT countries (e.g.: China, Latin America). So there is a great potential to enlarge the initiative, aggregating more actors and focusing on the business domain. The scope is to promote a new open source approach focused not only on technological aspects (software), but on business requirements (enterprise and end-user's needs) too.

More opportunities arise starting from 2007:

- the birth of OW2 Consortium adds new core-participants to the BI Initiative, as Talend and Altic, and widens the area of BI adoptions, enlarging to Chinese the participants coming from the old OrientWare organization.
- the OS BI is recognized on the market as an alternative to the proprietary products and is potentially making the difference by building BI functions into line-of-business applications for the web and the enterprise, bringing analytics to places and people who don't know they're doing BI. OS BI is creating a new BI market.

2.2 Opportunity

In the open source domain, particularly in the “middleware up-the stack” and applicative domain, customers are looking not only for “mature” solutions, but also for support services. Usually, support services are provided by one company (the project leader): so, the customers’ risk is moving from “software lock-in” to “services lock-in”. That’s why creating a network of companies supporting a wide stack of solutions in a specific domain represents a big opportunity both for the customers and for the software companies. This will be an opportunity for OW2 Consortium to show that its OS enterprise stack is an effective solution for the market opposite to proprietary single solutions. Nowadays, a lot of OS business models are very close to proprietary ones. Starting from the BI initiative, the “community way” to develop open source software could become a “community way” to support solutions, user needs, market opportunities. But this is not enough: the initiative could try to create a new market experience where a sustainable business is in the centre, supported by innovative models, new information & knowledge strategies and innovative technologies.

The initiative will address the following main issues:

- Investigate user needs in the “intelligent use” of all the information affecting their business
- Investigate new business models which could affect the market
- Find out new data models and analytical way to run through information
- Develop a new open source infrastructure with a continuous evolution to use new arising solutions and standards

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- Investigate research areas to create or study new models and technologies and bring them to maturity.

The main initiative working areas would be:

- A non-technological area: business model, end-user needs, new services
- A technological area: achieving the maturity of actual BI code-base and creating both BI verticalizations addressing specific market needs and the new generation of BI infrastructure
- A research area: new models, new technologies.

Main expected benefits for OW2 could be:

- to become a big player in the emerging OS BI domain driving innovation
- to become a preferential interlocutor for Europe and China (the main contributors to OW2 Consortium) and other emerging countries in the BI initiatives domain
- to make evidence that OW2 code base is not only an opportunity, but the driver of a real healthy OS market.

2.3 Alignment

By means of the BI initiative and with a special attention to user expectations, standards and market trends, OW2 members intend to provide guidelines to organizations, enterprises, technology stakeholders for professional reuse of OW2 open source platforms and solutions, thus fostering the development of related offering. In addition, they intend to enlarge the initiative to non-OW2 members, as well as organizations of end-users and/or consultants in different business domain, assigning to OW2 the role of leader of the initiative.

The BI Initiative key principles are:

- Promote a set of technologies and bring them to the mainstream
- Foster the adoption of open source technology and open standards in the industry and public administration
- Promote alternative way of thinking with a publication of periodically reports, white papers, real-world use-cases and corresponding business/IT solutions
- Share technical expertise, identify technology commons and define best practices that leverage the reuse of open source components
- Promote the adoption of open standards in the business and technological domain
- Contribute to the growth of an ecosystem that may bring business opportunities to new-class stakeholders (public administration, industry, academia, etc)
- Collaborate in widen the participants to the initiative to achieve a significant dimension and authoritative position in the market
- Foster the initiative especially in the emerging countries' markets
- Produce and create those realizations in a collaborative approach using a "co-authoring" method.

The main expected benefits for companies, organizations, individuals joining the initiative are the following:

- A big market opportunity

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- The chance to drive the growth of their solutions in a common direction achieving a great-worth
- The involvement in research activities driving the innovation of their own solutions
- The chance to enlarge their business: consultancy, services
- A facilitation in driving their solution in the emerging countries' markets
- A bigger dimension “the whole is more than the sum of its parts”.

3 Initiative Organization

3.1 Initiative Leadership

Organization	Justification
Engineering Ingegneria Informatica	Expertise in BI domain, main contributors and management of SpagoBI platform.

3.2 Initiative Participants

Organization	Contribution and Benefits
TALEND	Contribution: Talend Open Studio. Benefits: a prominent position in the data transformation component.
ALTIC	Contribution: promotion, integration and business activities. Benefits: an up front position for BI activities
DEIS University of Bologna	Contribution: research and observatory on BI trends and evolution. Benefits: a prominent position in BI research
DTI University of Milan	Contribution: research and observatory on BI for quality process management. Benefits: a prominent position in open source and quality management
DISI University of Trento	Contribution: research on data quality and security subjects. Benefits: a prominent position in BI subject
Artemis Information Management	Contribution: exploitation of data quality and security results. Benefits: a business open vision for data quality
Individual Members	Contribution: personal expertise in the BI domain. Benefits: a open vision coming from individuals complementing the companies and organizations vision

3.3 Initiative Prospective Participants

Organization	Contribution and Status
Italian Universities	More Universities currently involved in SpagoBI developments and usage. To be checked by Engineering. At the moment not OW2 members. They could provide specific expertise in research and modeling domain.
Italian PAs	Italian SpagoBI customers. To be checked by Engineering. At the moment not OW2 members. They could provide expertise in specific domains and use cases.
Italian Customers	Italian SpagoBI customers, particularly in the Healthcare domain. To be checked by Engineering. At the moment not OW2 members. They could provide expertise in specific domains and use cases.

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BI Consultants	International BI consultants in connection with SpagoBI team. To be checked by Engineering. At the moment not OW2 members. They could provide expertise and qualification.
French PAs	To be checked by Altic. At the moment not OW2 members. They could provide expertise in specific domains and use cases.
European and International companies, integrators, consultants and customers	To be checked by Talend. At the moment not OW2 members. They could provide expertise in specific domains, new code-base and use cases.
OW2 projects, OW2 companies, individuals	OW2 EC and OW2 MO could help to enlarge the Initiative within the OW2 Consortium.
International organizations, integrators, consultants, end-users (PA & Industry), academia, researchers	OW2 EC and OW2 MO could help to enlarge the Initiative at an international stage proving more participants and new OW2 members.

3.4 Initiative members team

- **Management Team Leader**

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Justification	Engineering's representative in OW2 Consortium, OW2 Board member, board member of Engineering's SpagoWorld Initiative. He sustains the growth of the Initiative.

- **Team members**

First Name, Last Name	Contact info	Organization	Role in the BI team
Stefano Scamuzzo	stefano.scamuzzo AT eng.it	Engineering	Technological aspects and coordination
Adelina Sperlea	adelina.sperlea AT eng.it	Engineering	Communications and marketing
Cédric Carbone	ccarbone AT talend.com	Talend	Technological aspects
Marc Sallieres	marc.sallieres AT altic.org	Altic	Business opportunities
Stefano Rizzi	stefano.rizzi AT unibo.it	DEIS University of Bologna	Research aspects
Matteo Golfarelli	matteo.golfarelli AT unibo.it	DEIS University of Bologna	Research aspects
Philippe Petit	philippe.petit AT artemis.lu	Artemis Information Management	Business and functional aspects
Ernesto Damiani	damiani AT dti.unimi.it	DTI University of Milano	Research aspects
Fabio Casati	casati AT dit.unitn.it	DISI University of Trento	Research aspects
Yannis Velegrakis	velgias AT disi.unitn.eu	DISI University of Trento	Research aspects

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4 Initiative Scope

4.1 Scope and long term vision

The BI Initiative could be supported by marketing activities at an initial stage, but it must reach rapidly a well known reputation in achieving its goals (see Alignments – key principles).

Main issues are:

- to achieve quickly a “good” dimension of authoritative members in the BI domain (not only OW2 members: the initiative must not be perceived as a sub-OW2 organization)
- to deliver periodically (every 6/12 months) concrete re-usable results
- to show a long-term vision dynamically adapted to market and technological evolution.

The main working areas of the Initiative are:

- a non-technological area: business model, end-user needs, new services
- a technological area: reaching the maturity of actual BI code-base and creating the new generation of BI infrastructure
- a research area: new models, new technologies.
- adopting and promoting new standards.

4.2 OW2 Projects

OW2 Projects	Justification
SpagoBI	Core platform, integrating different FOSS tools and engines
Talend Open Studio	The open source ETL tool
Spago	The Java EE framework used for SpagoBI extensions
Spago4Q	A vertical specialization of SpagoBI for Software Quality (to promote more vertical specializations for different business markets)

4.3 Non-OW2 Projects

Other Projects	Project Affiliation	Organization	Justification
To be checked among projects that are collaborating with SpagoBI			

4.4 Standards

Java EE standards (JCP) such as: JSR 168, JSR 170, JSR 286

According to the Initiative scope, the standard could be not only technological. The BI Initiative adopts the open standard definition of IDABC’s Interoperability European Framework (as much as possible).

5 Initiative Outlook

5.1 Initiative Activity Plan

The Initiative is focused on different working areas, delivers/creates different objects and activities and uses various marc-com and collaborative tools.

Non-Technological activities

- delivery of reports, white papers, benchmarks
- distribution of real world's use cases
- consolidation of a best practices list to fit users needs
- creation and coordination of an Open Source BI Service Network
- creation of a new business model in the OS domain
- guidance of the implementation of new organizational standards and widely adopted best practices (de-facto standards)

Technological activities

- use of the results of joint effort already done to enrich the SpagoBI integration platform with OW2 and non OW2 projects
- definition of a single road-map, sharing point of contacts of the projects specific road-maps
- creation of new verticalizations within OW2 code base such as Spago4Q
- joining the new OW2 Reference Platform

Research activities

- investigation on new BI activities and business and their correlations with different sources of information, new marketing approaches in OS
- joining current research (academic) investigations
- ROI evaluations in BI domain

Communication activities

- press releases
- press conferences
- participations at events, meetings
- publishing papers, articles
- BI Initiative website (within OW2 website)

Means of collaboration

- mailing list
- conference calls
- meetings
- wiki
- forum.

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5.2 Initiative tracks

In order to launch the initiative and start working on well defined activities, three tracks are proposed and left to open discussion:

- The BI Initiative envision about Open Source Business Intelligence
- Business Process control and monitoring
- Quality and security in data management and integration

The tracks are organized in such a way to exploit and optimize the contribution of each participant according to their interest and qualification. Nevertheless a unifying and common vision among the tracks is envisaged, aiming to address innovative aspects in the Business Intelligence domain to better qualify the Initiative itself. For that reason we imagine the first track, BI Open Source vision, as a transversal track and we foresee some aspects as personalization, what-if and federation as research and innovative aspects to be carefully observed in all tracks.

5.3 Roadmap

The Initiative has a long-term road-map that is yearly detailed and checked every six months. The road-map must involve all the aspects of the Initiative (technological, non-technological, research).

According to the Activity Plan and the start-up phase of the Initiative, here is the road-map till first half of 2008:

- **January 2008:**
 - o consolidation and release of the BI Initiative chapter, general agreement about its contents, consolidation of the core Initiative team,
 - o Go/Not-go decision: request to OW2 Board to move the Initiative from the Incubation to the Operational phase
 - o launching the Initiative: Common Press Release, Press Conferences of Members in their countries, talk in the OW2 Conference co-located with Solutions Linux Paris '08
- **February 2008:**
 - o start-up of Operational phase (after go decision); definition of the first non-technological deliverable.
 - o detailed definition of the 2008 Initiative road-map: first step, from the technological point of view, is set-up the road-map to join the OW2 Reference Implementation in accordance with OW2 Technology Council
- **April 2008:**
 - o release of the BI Initiative Manifesto, stating the main tracks, issues and cultural interests, defining the position of the BI initiative towards the market and the community
- **May 2008:**
 - o decision on track priorities and detailed roadmap for 2008 consolidation
- **July 2008:**
 - o release of the first non-technological deliverable.

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5.4 Milestones

Relevant Milestone	Description	Dead-line
1.0 Release of BI Chapter	First release of this document after general agreement about its contents	January 28, 2008
Operational phase	After approval of OW2 Boards of Directors and consensus of BI Initiative Team members	January 30, 2008
Operational phase	Start-up of the operational phase after go decision	February, 2008
Launching the Initiative	Press releases	January 2008
Launching the Initiative	OW2 Conference co-located with Solutions Linux Paris	January 31, 2008
2008 road-map	Road-map definition	February 2008
BI Initiative Manifesto	Release of the BI Initiative manifesto	April 30, 2008
2008 road-map	Consolidation of 2008 detailed road-map	May, 2008
First non-technological deliverable	Release of the first non-technological deliverable, according to the Initiative road-map.	July 20, 2008

6 Constraints:

6.1 Key Efforts

Main initial efforts are:

- The achievement of the strong commitment of each member in the Initiative (for at least one of the working areas + marketing)
- The allocation of enough time in the start-up phase, in order to properly communicate the Initiative goals to the market
- The commitment of each participant to enlarge the number of participants
- The commitment of OW2 EC and MO to support the BI Initiative and to enlarge the participants in the start-up phase.

6.2 Known Risks

The first risks to manage, before the go/not-go of the Initiative, are:

- not to be able to achieve an appropriate dimension of authoritative members in the BI domain in a short period (not only OW2 members: the initiative must not be perceived just as a sub-OW organization).
- Not to be able to deliver first results in a short time.

More execution issues are:

- Number of participants, “typology” of participants (authority in the market, balance of OW2/non-OW2 members, end-users and consultants, countries, ...)
- Real commitment of the participants and their time dedicated to the initiative (for at least one of the

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working areas + marketing)

- Not to be able to obtain, in a short period of time, a common vision (collaboration & co-authoring approach)
- Relationship (and dependence) with (on) OW2 Reference Platform.

7 IPR Policy

7.1 Licensing Policy

IPR Policy of the Initiative must conform with IPR policy of OW2 Consortium compliant to the OW2 Reference Implementation choices.

LGPL is the preferred license for projects joining the Initiative, as we think it is a good trade off between business friendliness and software asset protection. LGPL is also the license adopted by SpagoBI and Talend Open Studio, the Initiative core code base.

New projects will be integrated as long as their license is compatible with the license policy of already accepted projects.

The software contributing to the Initiative must maintain a free/open version of the code in the long-term (for the entire duration of the Initiative)

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7.2 Licenses

Licenses	Justification
GNU LGPL	Core code base of the Initiative (SpagoBI and Talend Open Studio). Used by most of OW2 projects
Creative Commons	License for documentation, in accordance to OW2 IP policies
OSI approved licenses	Solutions to be integrated in the BI Initiative code base. OSI approval assures a well meaning of OS policies.