

## Revision History

Version	Lead Author	Summary of Changes	Date
1.0	GR/SS	First version	25 January 2008
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## 1 General Information

### 1.1 Initiative Name

Initiative
OW2 BI Initiative

### 1.2 Initiative Contact Person

First Name, Last Name	Stefano Scamuzzo
Organization	Engineering Group
Telephone	+39 335 7542639
E-mail address	stefano.scamuzzo AT eng.it

### 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 information, 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.

In 2010, after having participated in the BI initiative activities for two years, we have learned the following lessons:

- the OS BI market is mature, and OW2 BI is in the real position to compete with the proprietary BI offering as well
- the extension of OW2 members to the USA, thanks to the inclusion of previously Open Solution Alliance members, also in the BI domain, offers a further chance to the BI initiative
- in order to optimize initiative participants efforts, we must focus the initiative both on technical aspects and on marketing/promotional activities
- the new OW2 membership level of Engineering Group, the previously BI initiative leader (downsized from strategic to corporate member) requires a re-organization of the initiative, according to OW2 bylaws.

### 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

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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
- 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 OS BI domain driving innovation
- to become a preferential interlocutor worldwide, in particular for Europe, China, Latin America 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

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- 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
- 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 Background

At its inception, the OW2 BI Initiative leader was Engineering Group, that has given the effort to kick-start, organize, promote and manage it in the first phase. In 2010 Engineering Group has downsized its OW2 membership from *Strategic* to *Corporate*. OW2 bylaws requires a Strategic Member to lead an Initiative. In order to not to waste the effort already done, OW2 Board of Directors asked for a new Strategic Member to lead the initiative. As the result, INRIA accepted to be the “formal leader” with a Supervision role, while Engineering Group remains the Initiative Manager. This decision is valid for one year, to be verified according to the initiative results at the end of this period.

#### 3.2 Initiative Leadership (Supervision)

Organization	Justification
INRIA	Strategic member of OW2 Consortium. Available to substitute Engineering Group in the formal leadership with the role of monitoring the OW2 BI Initiative results.

#### 3.3 Initiative Leadership (Management)

Organization	Justification
ENGINEERING Group	Corporate member of OW2 Consortium, leader of the OW2 BI Initiative in the first phase. Expertise in BI domain, main contributors and management of SpagoBI platform.

### 3.4 Initiative Participants

Organization	Contribution and Benefits
ALTIC	Contribution: promotion, integration and business activities. Benefits: an up front position for BI activities
ARTEMIS Information Management	Contribution: exploitation of data quality and security results. Benefits: a business open vision for data quality
INGRES	Contribution: as a leading provider of open source database management software and support services, it will contribute to building appliances and BI solutions.
JASPERSOFT	Contribution: as a leading BI provider, it contributes to the initiative promotion and technical collaboration
TALEND	Contribution: Talend Open Studio. Benefits: a prominent position in the data transformation component.
DTI University of Milan	Contribution: research and observatory on BI for quality process management. Benefits: a prominent position in open source and quality management
Individual Members	Contribution: personal expertise in the BI domain. Benefits: an open vision coming from individuals complementing the vision of companies and organizations

### 3.5 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.
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.

### 3.6 Initiative members team

- **Initiative Supervisor (INRIA)**

First Name, Last Name	Patrick Moreau
Organization	INRIA
Telephone	
E-mail address	patrick.moreau AT inria.fr
Justification	INRIA's representative in OW2 Consortium, OW2 Board member, he accepted to be the "substitute leader" of the BI initiative as an OW2 strategic member.

- **Management Team Leader (Engineering)**

First Name, Last Name	Stefano Scamuzzo
Organization	Engineering Group
Telephone	+39 335 7542639
E-mail address	stefano.scamuzzo AT eng.it
Justification	Board member of Engineering's SpagoWorld Initiative, international representative of SpagoBI suite. He sustains the growth of this initiative.

- **Team members**

First Name, Last Name	Contact info	Organization	Role in the BI team
Gabriele Ruffatti	gabriele.ruffatti AT eng.it	Engineering	Support, promotion, marketing
Stefano Modroni	stefano.modroni AT eng.it	Engineering	Technological aspects
Andrea Gioia	andrea.gioia AT eng.it	Engineering	Technological aspects
Cédric Carbone	ccarbone AT talend.com	Talend	Technological aspects
	akenouche AT talend.com	Talend	Technological aspects
	scorreia AT talend.com	Talend	Technological aspects
Vincent Ducrohet	vincent.ducrohet AT ingres.com	Ingres	Technological aspects, marketing, support
Stephane Padique	stephane.padique AT ingres.com	Ingres	Technological aspects, marketing, support
Emma McGrattan	emma.mcgrattan AT ingres.com	Ingres	Technological aspects
Mike Moody	mmoody AT jaspersoft.com	JasperSoft	Support, promotion, marketing
Giulio Toffoli	giulio AT jaspersoft.com	JasperSoft	Technological aspects
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Charly Clairmont	charly.clairmont AT altic.org	Altic	Technological aspects
Philippe Petit	philippe.petit AT artemis.lu	Artemis Information Management	Business and functional aspects
Manuel Da Silva	manuel.dasilva AT artemis.lu	Artemis Information Management	Business and functional aspects
Ernesto Damiani	damiani AT dti.unimi.it	DTI University of Milano	Research aspects

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Fulvio Frati	frati AT dti.unimi.it	DTI University of Milano	Research aspects
Alberto Colombo	colombo AT dti.unimi.it	DTI University of Milano	Research aspects
Olga Scotti	oscotti AT dit.unimi.it	DTI University of Milano	Promotion
Francoise Lettellier	fl AT flet.fr	OW2 Individual members representative	Promotion

## 4 Initiative Scope

### 4.1 Scope and long term vision

The BI Initiative must be supported by marketing in order to reach a well known reputation and achieve 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 are BI or BI-correlated projects hosted by OW2 Forge.

OW2 Projects	Justification
SpagoBI	Open Source BI suite, OW2 project
Spago	The Java EE framework, OW2 project; it's used for SpagoBI extensions
Spago4Q	A vertical specialization of SpagoBI for Software Quality, OW2 project (to be used to promote more vertical specializations for different business markets)

### 4.3 Non-OW2 Projects

Non-OW2 projects of OW2 members or non-OW2 members that are not hosted in OW2 Forge.

OW2 Projects	Justification
Ingres DBRMS	Ingres open source data base, OW2 member

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Jasper Reports/Analysis	BI suite, OW2 member
Talend Open Studio	Open Source Data Management and ETL tool, OW2 member

#### 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)
- management of a BI Initiative blog

#### Technological activities

- use of the results of the joint efforts that have already been done to enrich the projects of the participants to the initiative
- definition of a single road-map, sharing point of contacts of the projects specific road-maps
- creation of bundles, appliances, new BI verticalizations within OW2 code base

#### 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

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- publishing papers, articles, posts on blogs
- BI Initiative website (within OW2 website)

**Means of collaboration**

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

**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 detailed every year and checked every six months. The road-map must involve all the aspects of the Initiative (technological, non-technological, research).

The results of the BI Initiative will be checked by the Initiative Supervisor every six months according to a validation check-list based on the initiative road-map.

**5.4 Milestones**

Activity/Milestone	Description	Dead-line
Initiative re-start	Revitalization of the Initiative, release of the new Initiative charter, kick-start of the BI initiative blog, announcements in newsletters, websites	September 2010
Promotional phase	Participation in events (current planned events are Slovenia Business Linux Conference 2010 (September) and OW2 Annual Conference (November 2010))	September- November 2010
Operational phase	Update of BI initiative bundles/appliances, new integrations/demonstrators (to be planned)	September – December 2010
Initiative validation	Validation of initiative results by the Initiative Supervisor	April 2010
Initiative re-start	Election of the new Initiative leader	May 2010

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## 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 to the initiative support, 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 MO to support the BI Initiative and to enlarge the participants in the start-up phase.

### 6.2 Known Risks

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 working areas + marketing)
- Not to be able to obtain a common vision (collaboration & co-authoring approach).

## 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 initial 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.