OW2 OSS Good Governance initiative

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OW2 OSS Good Governance initiative

OSS Governance with a European Perspective

An Introduction

November 2021

Cédric Thomas
Fundamentals of the OSS Good Governance initiative
Open Source Momentum

- Two years from now proprietary software will be down to 32% of enterprise software stacks.
- 80 to 90% of an application is composed of reused components.
- Most of them open source.

Source: Sonatype, DevSecOps Community Survey, 2018
And RedHat report 2020
From Open Source Supporters to Open Source Skeptics

Open Source Has Won
by Rick Ellis on 11/19/2018

Linux and open source have won, 2015 was the year Linux and open-source software tool world, but many open-source and proprietary software

7 Reasons Not to Use Open Source Software
Businesses of all sizes embrace open source software and the benefits it can’t Sometimes, though, choosing proprietary software makes better business ser are seven scenarios when it pays to pay for your software

Why choose proprietary software over open source? Survey says!
Why do companies opt for proprietary software ove
Open Source Software: One Reality, Multiple Perspectives

- Technical
- Legal
- Commercial
- Financial
- Community
- HR
- Strategic
- (...)

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An Approach for Managing Open Source Professionally

- Technical
- Legal
- Commercial
- Financial
- Community
- HR
- Strategic
- (...)

- Flexible
- Shared
- Verifiable
- Measurable

- Economies
- Sovereignty
- Responsiveness
- Predictability
- Scale effects

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The Methodology
Under Development
A Comprehensive Framework for Managing Open Source Software

- A heuristic approach to open source
- A blueprint for open source policy implementation
- Five complementary GOALS
- Supported by CANONICAL ACTIVITIES
- Verified by CUSTOMIZED SCORECARDS

Attribution: icons by Gregor Cresnar, https://www.flaticon.com/authors/gregor-cresnar
Key Concepts

Blueprint

Goals

Activities

Scorecards

Usage Goal
Technical Skills in Using Open Source Software.

Key content
- Using OSS and competences in using OSS. It covers technical ability and experience with OSS
- Developing some understanding and awareness of OSS

Current activities:
- Managing OSS development skills
- Ensure basic skills in OSS technos
- Proactive OSS decision making
- Using OSS enterprise software
- OSS review

Verification points
- Inventory of OSS used
- Inventory of available skills
- Inventory of required skills
- Understanding of OSS licenses
Trust Goal
Secure and Appropriate Usage of Open Source Software.

Key content
- Using OSS legally and safely
- Organised software reuse
- Organised license management
- OSS production best practices

Current activities:
- Managing legal compliance
- Manage software vulnerabilities
- Manage software dependencies
- Manage key indicators

Verification points:
- Compliance policy, officer
- Dependency and security management policy
- Use of compliance and dependency management tools
Culture Goal
Belonging to the Open Source Community at Large.

Key content
- OSS culture that helps implementing best practices
- Sharing with the open source community
- Engaging with support communities

Current activities:
- OSS development principles
- Contributing to OSS projects
- Upstream first
- HR perspective
- Belonging to the OSS community

Verification points
- Personal and Professional contributions to OSS projects
- Individual attendance at OSS events
Engagement Goal
Engaging with the OSS ecosystem.

Key content
- Contributing back to OSS projects and supporting OSS communities
- Publicly asserting use of open source

Current activities:
- Contributing back to OSS projects
- Supporting OSS communities
- Publicly asserting use of OSS
- Contracting with OSS vendors
- Participating in OSS events

Verification points
- Communication actions
- Event participation
- Financial sponsoring
- Publicly shared code and contributions
Strategy Goal
Proactively using OSS for innovation and competitiveness.

Key Content
- C-level awareness of open source as an enabler
- Innovation
- Sovereignty
- Digital transformation

Current activities:
- C-Level awareness building
- Link OSS with digital sovereignty
- OSS enabling innovations
- OSS enabling digital transformation

Verification points
- Open source in corporate IT strategy
- Open source supporting new activities
- Open source in annual report
A Blueprint for Implementing Good Open Source Governance

Goals

Activities and their Scorecards

- **Management guidance**
- **Experience sharing**
- **Progress monitoring and reporting**
A Blueprint for Implementing Good Open Source Governance

- Management guidance
- Experience sharing
- Progress monitoring and reporting

Goals

Activities and their Scorecards

- Completed
- In progress
- Pending
- Delayed

Usage

- Activity U1
- Activity U2
- Activity U3
- Activity U4
- Activity U5

Trust

- Activity T1
- Activity T2
- Activity T3
- Activity T4
- Activity T5

Culture

- Activity C1
- Activity C2
- Activity C3
- Activity C4
- Activity C5

Engagement

- Activity E1
- Activity E2
- Activity E3
- Activity E4
- Activity E5

Strategy

- Activity S1
- Activity S2
- Activity S3
- Activity S4
- Activity S5

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Implementing the OW2 OSS GGi Methodology
Production System

OW2.org

GGi Resource Center

Customized Activity Scorecard

Online/Offline

GitLab.OW2

Canonical Activities

Task Tracker

Resource Center

- Web pages on the GGI wiki: useful links, readings, tools, news, presentations, etc.

Canonical Activities

- On GitLab (ggi-castalia): the place where we collectively discuss and work on developing Canonical Activities

Customized Activity Scorecard

- The deck of scorecards with simplified Activity details; to be adapted to the specifics of each organisation

Task Tracker

- On GitLab (ggi-yourorganisation): an issue tracker made available to manage tasks
Canonical Activity Template

Description
Provide a description of the Activity.

Opportunity Assessment
Why it is relevant to undertake this activity, What needs it addresses. What are the efforts expected. How much will it cost? What resources do we need? What RoI can be gained?

Progress Assessment
How can I assess if the activity is acquired? How will progress be measured. What are the objectives? What are the KPIs? Suggest verification point.

Tools
Technologies, tools and products concerned by this Activity.

Recommendations
Hints and best practices. Collected from GGI participants.

Resources
Links to resources in the Resource Center.

Relations
Links to related Activities or Activities with dependencies
The Activity Forum

- **Canonical Activities**

- **(Usage Goal) Manage open source development skills**
  - **Developer**
  - **Team Leader**

- **(Usage Goal) Ensure basic development technologies**
  - **Team Leader**

- **(Usage Goal) Open source decision making**
  - **Team Leader**

- **(Usage Goal) Open source enterprise software**
  - **Decision Maker**

- **Setup OSS Basics training**
  - **Need ScoreCard**
  - **Team Leader**

- **(Trust Goal) Managing legal compliance**
  - **Decision Maker**

- **(Trust Goal) Manage software vulnerabilities**
  - **Team Leader**

- **(Trust Goal) Manage software dependencies**
  - **Developer**
  - **Team Leader**

- **(Trust Goals) Manage key indicators**

- **Setup a legal/IP team contact**
  - **Team Leader**

- **Setup a dedicated Legal/IP team**
  - **Decision Maker**

- **Promote OSS within the company**
  - **Decision Maker**
  - **Engagement Goal**

- **Community Documents**
  - **Developer**

- **(Culture Goal) Open source development principles**
  - **#25**

- **(Culture Goal) Contributing to open source projects**
  - **#26**

- **(Culture Goal) Belonging to the open source community**
  - **Decision Maker**
  - **Team Leader**

- **(Culture Goal) HR perspective**

- **Promote OSS outside of the company**
  - **Decision Maker**
  - **Strategy Goal**
  - **#11**

- **Fund external OSS projects**

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[Visit the GitLab page](https://gitlab.ow2.org/ggi/ggi-castalia/-/boards/449)

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Customizing the Methodology

Canonical Activities

- Developed on the Activity Forum
- Multiple authors
- Collective experience
- Broad reaching scope
- Online gitlab.ow2

Customized Activity Scorecard

- Developed in-house
- Few authors
- Focus on organisation needs
- A management and communication tool
- Online or offline
Using the Activity Scorecard

- **Phase 1: Discovery**
  - Understanding key concepts, taking ownership of the methodology, aligning goals expectations

- **Phase 2: Customization**
  - Adapting Activity description and opportunity assessment to organisation specifics,

- **Phase 3: Prioritization**
  - Identifying objectives and key results tasks and tools, scheduling milestones and drafting timeline

- **Phase 4: Activation**
  - Finalize Scorecard, budget, assignments, document tasks on issue manager

- **Phase 5: Iteration**
  - Assess and score results, highlight issues, improve, adjust. Iterate every quarter or semester.
<table>
<thead>
<tr>
<th><strong>Title Disambiguation</strong></th>
<th>First of all take a few minutes to develop an understanding of what the Activity might be about and its relevance, how it can fit in your overall OSS management journey.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customized Description</strong></td>
<td>Adapt the Activity to the specifics of the organisation, scoping. Define the scope of the Activity, the particular use case you will address.</td>
</tr>
</tbody>
</table>
# The Blueprint

**Action plan, Roadmap, Game plan, Programme, ...**

<table>
<thead>
<tr>
<th>Usage</th>
<th>Trust</th>
<th>Culture</th>
<th>Engagement</th>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>U1: Inventory of open source skills and resources</td>
<td>T1: Manage legal compliance</td>
<td>C1: Promote open source development best practices</td>
<td>E1: Publicly asserting use of open source</td>
<td>S1: C-Level awareness</td>
</tr>
<tr>
<td>U2: Open source development skills and resources</td>
<td>Activity T2</td>
<td>C2: Contributing to OSS projects</td>
<td>E2: Engaging with OSS Projects</td>
<td>Activity S2</td>
</tr>
<tr>
<td>U3: Using open source enterprise software</td>
<td>Activity T3</td>
<td>C3: Belonging to the open source community</td>
<td>Activity E3</td>
<td>Activity S3</td>
</tr>
<tr>
<td>U4: Open source decision making</td>
<td>Activity T4</td>
<td>C4: HR Perspective</td>
<td>Activity E4</td>
<td>Activity S4</td>
</tr>
<tr>
<td>U5</td>
<td>Activity T5</td>
<td>C5: Upstream First</td>
<td>Activity E5</td>
<td>Activity S5</td>
</tr>
</tbody>
</table>

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The OW2 OSS Good Governance initiative in Action
The OW2 Open Source Good Governance initiative offers a blueprint to help implement corporate-wide open source policies.

The OW2 Open Source Good Governance Initiative is a joint effort between OW2 members and non-members to grow awareness and expertise on how to professionally use and contribute to open source software with the objective to improve competitiveness and enhance the sustainability of the European OSS ecosystem.
Three Strategic Objectives

Contribute to defining and promoting the state of the art

Foster a pan-European initiative open to all sectors

Develop a neutral, accessible experience-sharing platform
Reaching Out!

Non-Profit Organisations

Users, Implementors Contributors

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2021 Timeline

Q1-21
- Methodology basics in place

Q2-21
- OSPO Alliance
- OW2con Launch
- Associate Organisations

Q3-21
- Methodology and training material development
- Publish Handbook
- Beta-Testers
- Onboard vendors
- Tool vendors
- Consultants

Q4-21
- Public campaign
- Consensus building
- Dedicated session
- Roundtable
- Monthly calls
- Offline contributions
- Promotion partners
- Support testimonials
- Early users
- Contributors
How to get in on it?

Contributing to the methodology...

...contributing to its dissemination
Thank You

And now let's talk
Q&A
Disagreements
Complements
Feedback
etc.

www.ow2.org