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 took 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 se 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 ov
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 OSS Good Governance Methodology
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
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
► Ensuring 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

Management guidance
Experience sharing
Progress monitoring and reporting

Goals

Activities and their Scorecards

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
A Blueprint for Implementing Good Open Source Governance

- Management guidance
- Experience sharing
- Progress monitoring and reporting

**Goals**

**Activities and their Scorecards**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Usage</th>
<th>Trust</th>
<th>Culture</th>
<th>Engagement</th>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity U1</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Activity U2</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Activity U3</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Activity U4</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Activity U5</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

- Completed
- In progress
- Pending
- Delayed

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Implementing the OW2 OSS GGi Methodology
Production System

- OW2.org
- GitLab.OW2

GGi Resource Center

- Canonical Activities
- Task Tracker

Customized Activity Scorecard

Online/Offline

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 security and 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 Goal: Manage key indicators

- Setup a legal/IP team contact
  - Team Leader

- Setup a dedicated Legal/IP team
  - Decision Maker

- Culture Goal: Promote OSS within the company
  - Decision Maker

- Community Documents
  - Developer

- Culture Goal: Open source development principles

- Culture Goal: Contributing to open source projects

- Culture Goal: Belonging to the open source community
  - Decision Maker
  - Team Leader

- Culture Goal: HR perspective

- Engagement Goal

- Promote external contributions
  - Developer
  - Team Leader

- Fund participation to events
  - Decision Maker

- Setup a legal/IP corporate contact
  - Decision Maker

- Promote OSS outside of the company
  - Decision Maker
  - Need ScoreCard

- Fund external OSS projects

https://gitlab.ow2.org/ggi/ggi-castalia/-/boards/449

Cedric Thomas, OW2, 2021
Customizing the Methodology

**Canonical Activity**
- 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>
<tr>
<td><strong>Opportunity Assessment</strong></td>
<td>Explain why it is relevant to undertake this activity, What needs it addresses. What are our pain points. What are the opportunities for progressing? What can be gained?</td>
</tr>
<tr>
<td><strong>Objectives</strong></td>
<td>Define a couple of crucial objectives for the Activity. Pain points to be fixed, progress opportunities, wishes. Identify key tasks. What we aim to achieve in this iteration</td>
</tr>
<tr>
<td><strong>Tools</strong></td>
<td>Technologies, tools and products used in the Activity.</td>
</tr>
<tr>
<td><strong>Operational Notes</strong></td>
<td>Indications on approach, method, strategy to progress in this Activity.</td>
</tr>
<tr>
<td><strong>Key Results</strong></td>
<td>Define measurable, verifiable expected results. Choose results indicating progress with regard to the Objectives. Indicate KPIs here.</td>
</tr>
<tr>
<td><strong>Progress, Score</strong></td>
<td>Progress is, in %, the completion rate of the result, Score the personal success rating.</td>
</tr>
<tr>
<td><strong>Personal Assessment</strong></td>
<td>For each result you can add a brief explanation and explain your personal satisfaction rate expressed in the Score.</td>
</tr>
<tr>
<td><strong>Timeline</strong></td>
<td>Indicate Start-End dates, Phasing tasks, Critical steps, Milestones</td>
</tr>
<tr>
<td><strong>Efforts</strong></td>
<td>Evaluate requested time and material resources, internal and third-party. What are the efforts expected. How much will it cost? What resources do we need?</td>
</tr>
<tr>
<td><strong>Assignees</strong></td>
<td>Say who participates. Assign tasks or Activity leadership and responsibilities</td>
</tr>
<tr>
<td><strong>Issues</strong></td>
<td>Identify key issues, foreseen difficulties, risks, roadblocks, uncertainties, points of attention, critical dependencies</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Write here a synthetic assessment of how the Activity is doing: healthy? Delayed? Etc.</td>
</tr>
<tr>
<td><strong>Overall Progress Rating</strong></td>
<td>Your own high-level, management-oriented, synthetic Activity progress evaluation.</td>
</tr>
</tbody>
</table>
The Blueprint

**Usage**

- **U1**: Inventory of open source skills and resources
- **U2**: Open source development skills and resources management
- **U3**: Using open source enterprise software
- **U4**: Open source decision making
- **U5**

**Trust**

- **T1**: Manage legal compliance
- **T2**: Activity T2
- **T3**: Activity T3
- **T4**: Activity T4
- **T5**: Activity T5

**Culture**

- **C1**: Promote open source development best practices
- **C2**: Contributing to OSS projects
- **C3**: Belonging to the open source community
- **C4**: HR Perspective
- **C5**: Upstream First

**Engagement**

- **E1**: Publicly asserting use of open source
- **E2**: Engaging with OSS Projects
- **E3**: Activity E3
- **E4**: Activity E4
- **E5**: Activity E5

**Strategy**

- **S1**: C-Level awareness
- **S2**: Activity S2
- **S3**: Activity S3
- **S4**: Activity S4
- **S5**: Activity S5

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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

Cedric Thomas, OW2, 2021
2021 Timeline

<table>
<thead>
<tr>
<th>Q1-21</th>
<th>Q2-21</th>
<th>Q3-21</th>
<th>Q4-21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Methodology basics in place</td>
<td>Methodology and training material development</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Monthly calls**
  - Offline contributions
- **Public campaign**
  - Consensus building
- **Dedicated session**
  - Roundtable
- **Promotion partners**
  - Support testimonials
- **OSPO Alliance**
- **OW2con Launch**
- **Associate Organisations**
- **Publish Handbook**
- **Beta-Testers**
- **Onboard vendors**
- **Early users**
  - Contributors
- **Tool vendors**
  - Consultants

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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.