OW2 OSS Good Governance initiative
An OSPO Implementation Blueprint

An Introduction
OSPO OnRamp
10 December 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 the 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 offer. Sometimes, though, choosing proprietary software makes better business sense 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 over open source?
Open Source Software: One Reality, Multiple Perspectives

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

Cedric Thomas, OW2, 2021
An Approach for Managing Open Source Professionally

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

- Flexible
- Shared
- Verifiable
- Measurable

- Economies
- Sovereignty
- Responsiveness
- Predictability
- Scale effects

Cedric Thomas, OW2, 2021
The OW2 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

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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

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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

Blueprint

Goals

Activities and their Scorecards

<table>
<thead>
<tr>
<th>Activity U1</th>
<th>Activity T1</th>
<th>Activity C1</th>
<th>Activity E1</th>
<th>Activity S1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity U2</td>
<td>Activity T2</td>
<td>Activity C2</td>
<td>Activity E2</td>
<td>Activity S2</td>
</tr>
<tr>
<td>Activity U3</td>
<td>Activity T3</td>
<td>Activity C3</td>
<td>Activity E3</td>
<td>Activity S3</td>
</tr>
<tr>
<td>Activity U4</td>
<td>Activity T4</td>
<td>Activity C4</td>
<td>Activity E4</td>
<td>Activity S4</td>
</tr>
<tr>
<td>Activity U5</td>
<td>Activity T5</td>
<td>Activity C5</td>
<td>Activity E5</td>
<td>Activity S5</td>
</tr>
</tbody>
</table>
A Blueprint for Implementing Good Open Source Governance

Management guidance
Experience sharing
Progress monitoring and reporting

Blueprint

Goals

Usage

Trust

Culture

Engagement

Strategy

Activities and their Scorecards

Activity U1
Activity U2
Activity U3
Activity U4
Activity U5

Activity T1
Activity T2
Activity T3
Activity T4
Activity T5

Activity C1
Activity C2
Activity C3
Activity C4
Activity C5

Activity E1
Activity E2
Activity E3
Activity E4
Activity E5

Activity S1
Activity S2
Activity S3
Activity S4
Activity S5

Completed
In progress
Pending
Delayed
Implementing the OW2 OSS Good Governance Methodology
Production System

- **OW2.org**
  - GGi Resource Center
  - Customized Activity Scorecard
  - Online/Offline

- **GitLab.OW2**
  - Canonical Activities
  - Task Tracker
  - GitLab.OW2

### 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 Activity details adapted to the specifics of each organisation

### Task Tracker
- On GitLab (ggi-yourorganisation): an issue tracker made available to manage tasks
The Activity Forum

(Usage Goal) Manage open source development skills
- Developer
- Team Leader
#17

(Usage Goal) Ensure base technologies are up to date
- Team Leader
#18

(Usage Goal) Open source decision making
- Team Leader
#19

(Usage Goal) Open source enterprise software
- Decision Maker
#20

Setup OSS Basics training
- Need ScoreCard
- Team Leader
#7

(Trust Goal) Managing legal compliance
- Decision Maker
#21

(Trust Goal) Manage software vulnerabilities
- Team Leader
#22

(Trust Goal) Manage software dependencies
- Developer
- Team Leader
#23

(Trust Goals) Manage key indicators
#24

Setup a legal/IP team contact
- Team Leader
#13

Setup a dedicated Legal/IP team
- Decision Maker
#25

Promote OSS within the company
- Decision Maker
- Engagement Goal
#10

Community Documents
- Developer
#3

(Culture Goal) Open source development principles
#26

(Culture Goal) Contributing to open source projects
#26

(Culture Goal) Belonging to the open source community
- Decision Maker
- Team Leader
#27

(Culture Goal) HR perspective

Canonical Activities

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

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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.

(Trust Goal) Managing legal compliance

Description
Implementing mature and professional management of legal compliance so as to ensure there are no legal issue in using, integrating, modifying or creating and contributing to open source software.

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
Question: 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.

• Set up a license checking process as in #2
• Set up a legal/IP team as in #13
• Implement reuse.software as in #14

Add KPI description here

Tools
Technologies, tools and products concerned by this activity.

• reuse.software
• Fossology
• Scancode
• SW360

Recommendations
Hints and best practices. Collected from GGI participants.

• Inform people about the risks associated with bad licensing.
• Propose an easy solution for projects to setup licence checking on their code base.
• Communicate on its importance and help projects to add it in their CI systems.

Add recommendations here

Resources
Links to resources in the Resource Center.

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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 (Task Tracker)

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

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

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

Trust
- T1: Manage legal compliance
- Activity T2
- Activity T3
- Activity T4
- 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
- Activity E3
- Activity E4
- Activity E5

Strategy
- S1: C-Level awareness
- Activity S2
- Activity S3
- Activity S4
- Activity S5
The OW2 OSS Good Governance initiative in Action
https://todogroup.org/members/
https://www.openchainproject.org/about
https://tosit.fr/

Cedric Thomas, OW2, 2021
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
How to get in on it?

Contributing to the methodology...

... Contributing to its dissemination

https://www.ow2.org/OSS_Governance

Welcome to the OSPO.Zone!

The OSPO Alliance's platform for sharing and promoting open source best practices and experiences.

Learn More

Join us!
Thank You