OW2 OSS Good Governance initiative
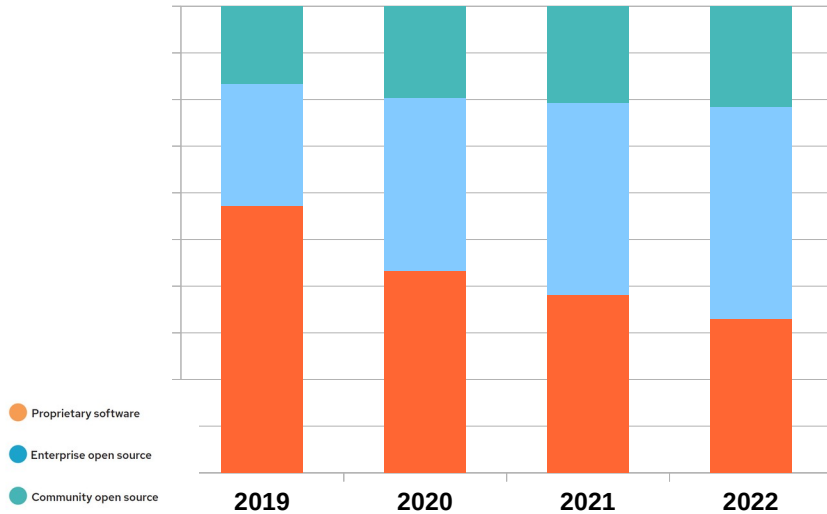## *An OSPO Implementation Blueprint*

An Introduction

OSPO OnRamp

10 December 2021
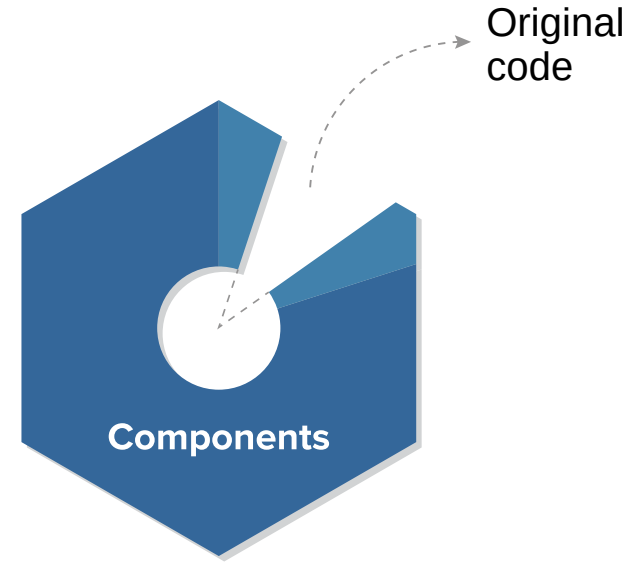
Cédric Thomas

Fundamentals of the OSS Good Governance initiative
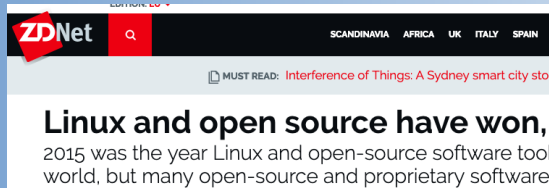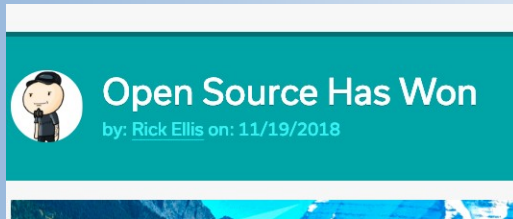
Open Source Momentum

Legend:
- Proprietary software
- Enterprise open source
- Community open source

2019 2020 2021 2022

▶Two years from now proprietary software will be down to 32% of enterprise software stacks.

Original code

Components

▶80 to 90% of an application is composed of reused components

▶Most of them open source

Cedric Thomas, OW2, 2021

Source: Sonatype, DevSecOps Comunity Survey, 2018
And RedHat report 2020

From Open Source Supporters to Open Source Skeptics

Open Source Software: One Reality, Multiple Perspectives

- Technical
- Legal
- Commercial
- Financial
- Community
- HR
- Strategic
- (…)
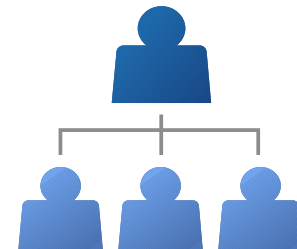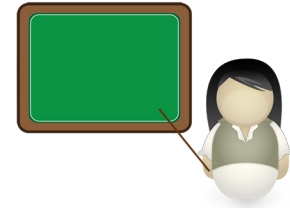
An Approach for Managing Open Source Professionally

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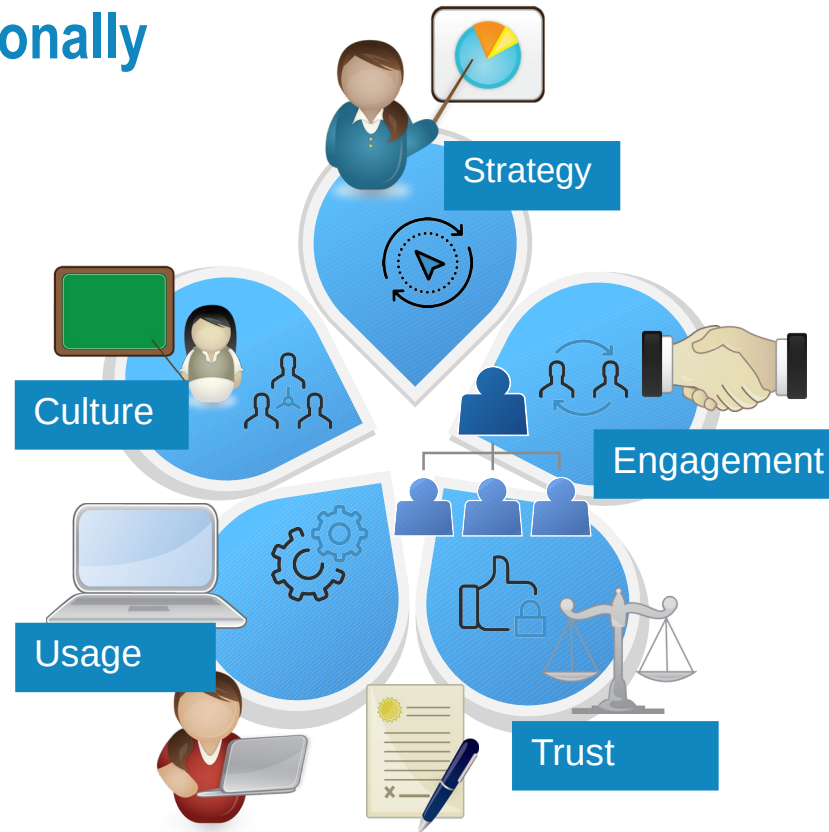▶Commercial
▶Financial
▶Community
▶HR
▶Strategic
▶(...)

Strategy

Culture

Engagement

Usage

Trust

▶Flexible

▶Shared

▶Verifiable

▶Measurable

▶Economies

▶Sovereignty

▶Responsiveness

▶Predictability

▶Scale effects

The OW2 OSS Good Governance Methodology

A Comprehensive Framework for Managing Open Source Software

Strategy

Engagement

Usage

Culture

Trust
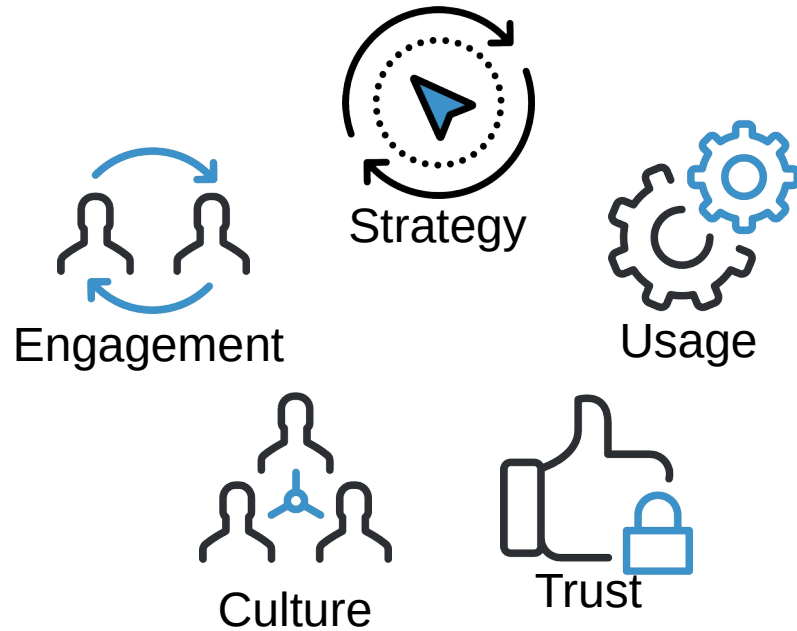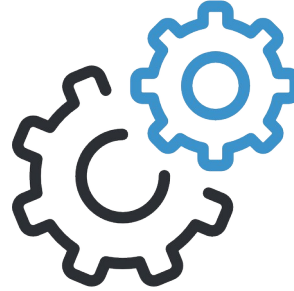
▶A heuristic approach to open source

▶A blueprint for open source policy implementation

▶Five complementary **GOALS**

▶Supported by **CANONICAL ACTIVITIES**

▶Verified by **CUSTOMIZED SCORECARDS**

Cedric Thomas, OW2, 2021   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

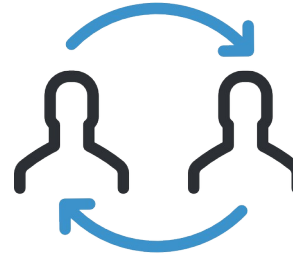   ▶Engaging with support communities

▶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.
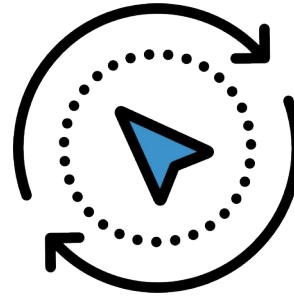
▶Key Content

> ▶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

Good Governance
an OW2 initiative

OW2

A Blueprint for Implementing Good Open Source Governance

▶Management guidance

▶Experience sharing

▶Progress monitoring and reporting

Blueprint

Goals
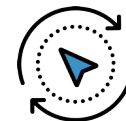
	Usage	Trust	Culture	Engagement	Strategy
Activities and their **Scorecards**	Activity U1	Activity T1	Activity C1	Activity E1	Activity S1
	Activity U2	Activity T2	Activity C2	Activity E2	Activity S2
	Activity U3	Activity T3	Activity C3	Activity E3	Activity S3
	Activity U4	Activity T4	Activity C4	Activity E4	Activity S4
	Activity U5	Activity T5	Activity C5	Activity E5	Activity S5

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 T1 ✅	Activity C1 ✅	Activity E1 ✅	Activity S1 ◉
	Activity U2 ✅	Activity T2 ✅	Activity C2 ◉	Activity E2 ✅	Activity S2 ◉
	Activity U3 ◉	Activity T3 ✅	Activity C3 ✅	Activity E3 ✅	Activity S3 ◉
	Activity U4 ✅	Activity T4 ⚠️	Activity C4 ✅	Activity E4 ⚠️	Activity S4 ○
	Activity U5 ✅	Activity T5 ◉	Activity C5 ⚠️	Activity E5 ⚠️	Activity S5 ◉
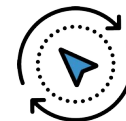
✅ Completed

◉ In progress

○ Pending

⚠️ Delayed

Implementing the OW2 OSS Good Governance Methodology

Production System

OW2.org	GitLab.OW2
GGi Resource Center	Canonical Activities

Customized Activity Scorecard	Task Tracker

Online/Offline   GitLab.OW2
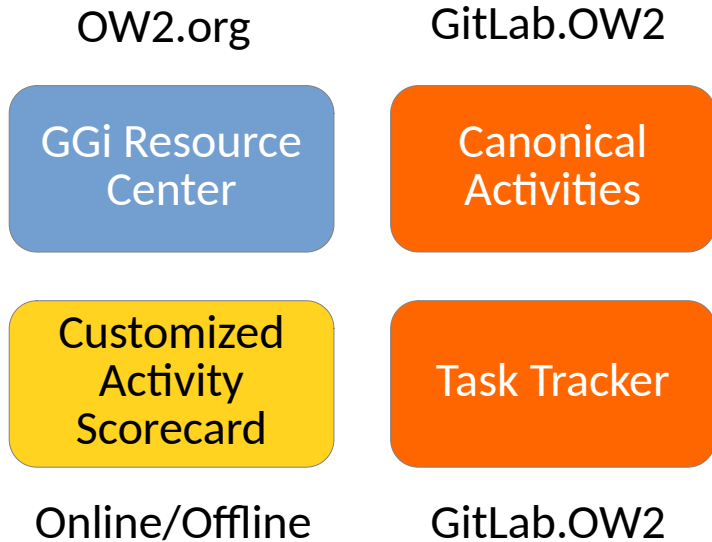
▶Resource Center

  ▶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

Canonical Activities

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

Goals ⌄   Search or filter results...   Add list

Usage Goal 5   **Trust Goal** 9 + ⚙   **Culture Goal** 7 + ⚙   **Engagement Goal** 11

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

(Usage Goal) Ensure ba... technologies
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

Promote OSS within the company
Decision Maker   Engagement Goal
#10

Community Documents
Developer
#3

(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
#27

(Culture Goal) HR perspective

Promote OSS within the company
Culture Goal   Decision Maker
#10

Promote external contributions
Developer   Team Leader
#12

Fund participation to events
Decision Maker   Need ScoreCard
#9

Setup a legal/IP corporate contact
Decision Maker   Need ScoreCard   Team Lead...
#5

Promote OSS outside of the company
Decision Maker   Need ScoreCard   Strategy Go...
#11

Fund external OSS projects

Good Governance
an OW2 initiative

OW2   Cedric Thomas, OW2, 2021

19   CC BY

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

Please provide a description of the activity.

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?

With the ever growing use of OSS in an organisation's information systems it is important to be covered with regard to potential legal exposure.

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 licencing.
- 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

Customizing the Methodology

Canonical Activities
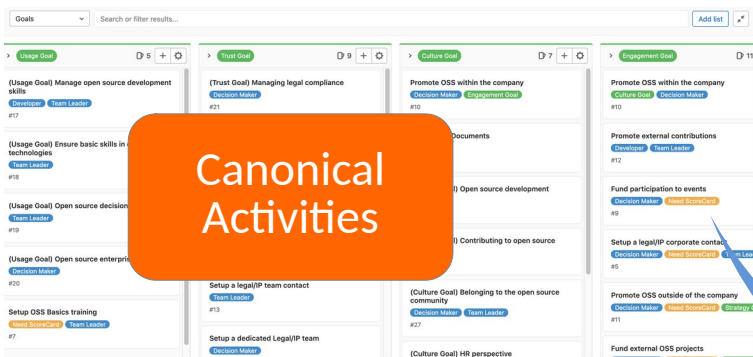
Canonical Activity

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

Customized Activity Scorecard

Customized Activity Scorecard

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

Using the Activity Scorecard
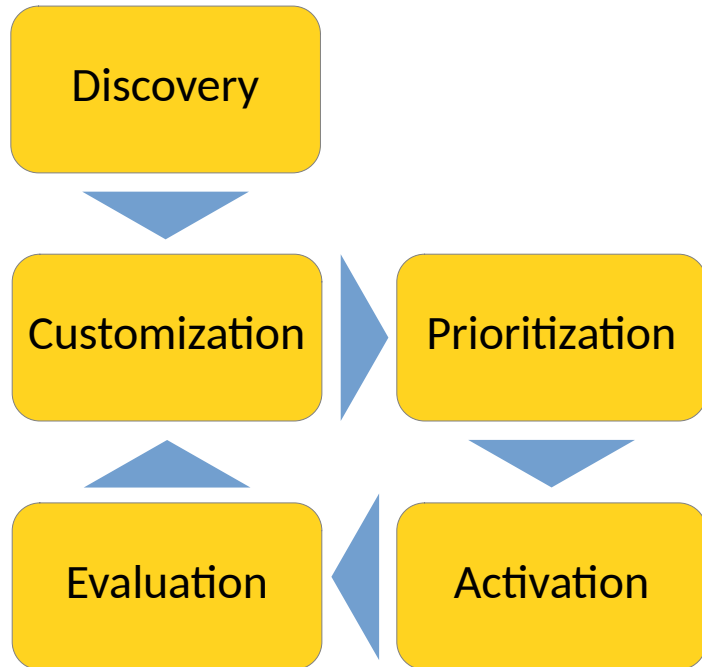
▶Phase 1: Discovery

 ▶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.

Drafting the Customized Activity Scorecard

Customized Activity Scorecard

Title Disambiguation	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.
Customized Description	Adapt the Activity to the specifics of the organisation, scoping. Define the scope of the Activity, the particular use case you will adress.
Opportunity Assessment	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?
Objectives	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
Tools	Technologies, tools and products used in the Activity.
Operational Notes	Indications on approach, method, strategy to progress in this Activity.
Key Results	Define measurable, verifiable expected results. Choose results indicating progress with regard to the Objectives. Indicate KPIs here.
Progress, Score	Progress is, in %, the completion rate of the result, Score the personal success rating.
Personal Assessment	For each result you can add a brief explanation and explain your personal satisfaction rate expressed in the Score.
Timeline	Indicate Start-End dates, Phasing tasks, Critical steps, Milestones
Efforts	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?
Assignees	Say who participates. Assign tasks or Activity leadership and responsibilities
Issues	Identify key issues, foreseen difficulties, risks, roadblocks, uncertainties, points of attention, critical dependencies
Status	Write here a synthetic assessment of how the Activity is doing: healthy? Delayed? Etc.
Overall Progress Rating	Your own high-level, management-oriented, synthetic Activity progress evaluation.

Good Governance
an OW2 initiative

OW2

Cedric Tho

The Blueprint

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

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

The OW2 OSS Good Governance initiative in Action

https://todogroup.org/members/

https://www.openchainproject.org/about

https://tosit.fr/

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.
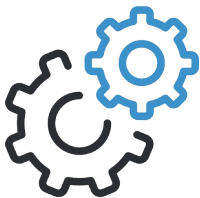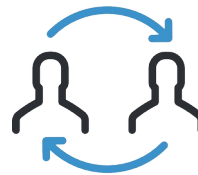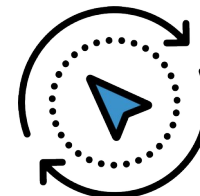
Usage	Trust	Culture	Engagement	Strategy

Three Strategic Objectives
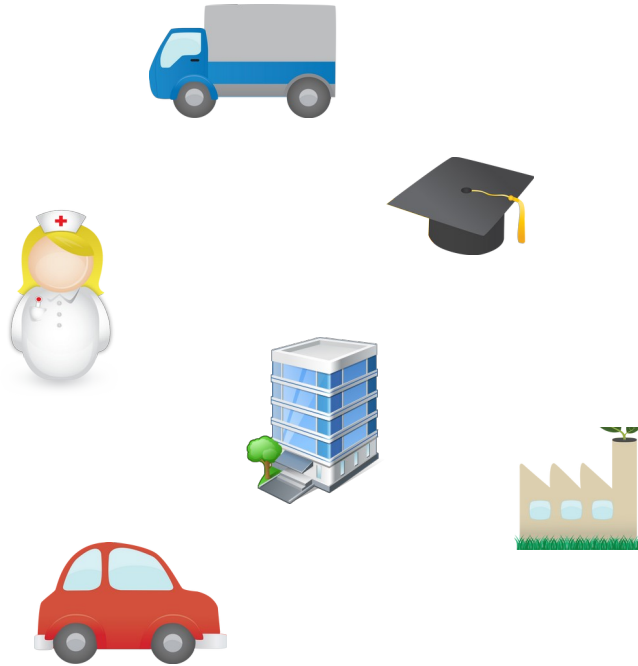
Contribute to defining and promoting the state of the art

Foster a pan-European initiative open to all sectors

Develop a neutral, accessible experience-sharing platform

Good Governance
an OW2 initiative

OW2

Reaching Out!

OSPO ZONE

The Handbook

https://ospo.zone/ggi/

Open Source

Good Governance

Handbook

Authors: OW2 & The Good Governance Initiative participants
Version: v1.0
Date: November 5, 2021

Contents

How to get in on it?

Contributing to the methodology…   … Contributing to its dissemination

https://www.ow2.org/OSS_Governance

https://www.ospo.zone

Thank You