



OW2 OSS Good Governance initiative

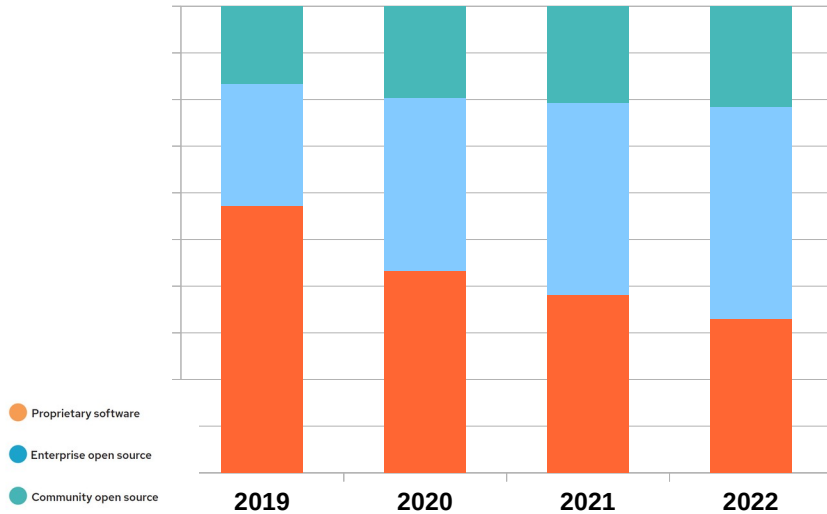
An OSPO Implementation Blueprint

An Introduction
OSPO OnRamp
10 December 2021
Cédric Thomas

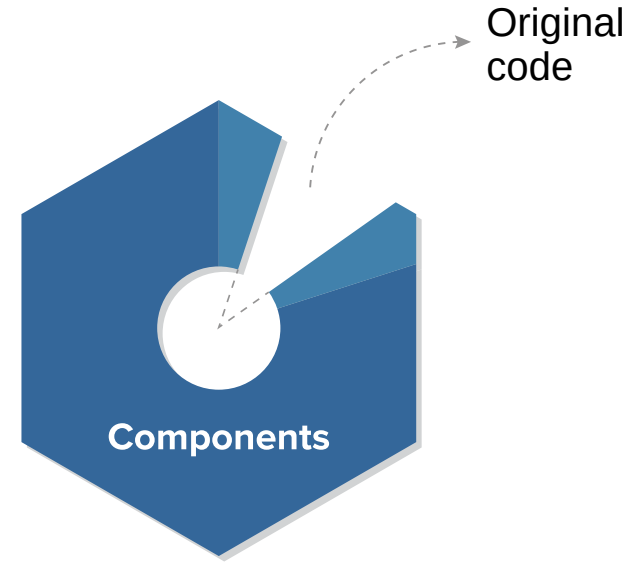


Fundamentals of the OSS Good Governance initiative

Open Source Momentum



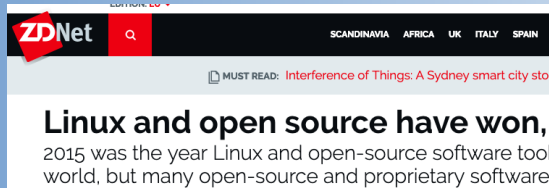
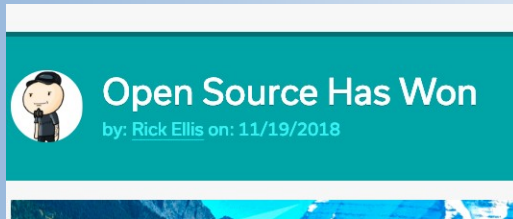
▶ Two years from now proprietary software will be down to 32% of enterprise software stacks.



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

▶ Most of them open source

From Open Source Supporters to Open Source Skeptics



7 Reasons Not to Use Open Source Software

Businesses of all sizes embrace open source software and the benefits it can bring. Sometimes, though, choosing proprietary software makes better business sense. Here are seven scenarios when it pays to pay for your software.



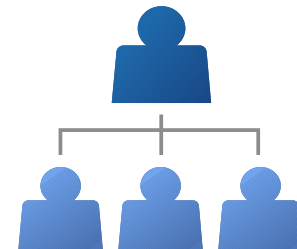
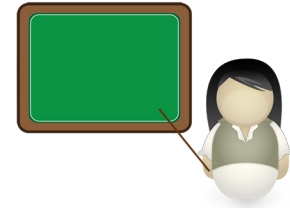
Why choose proprietary software over open source? Survey says!

Why do companies opt for proprietary software over open source?

Open Source Software: One Reality, Multiple Perspectives

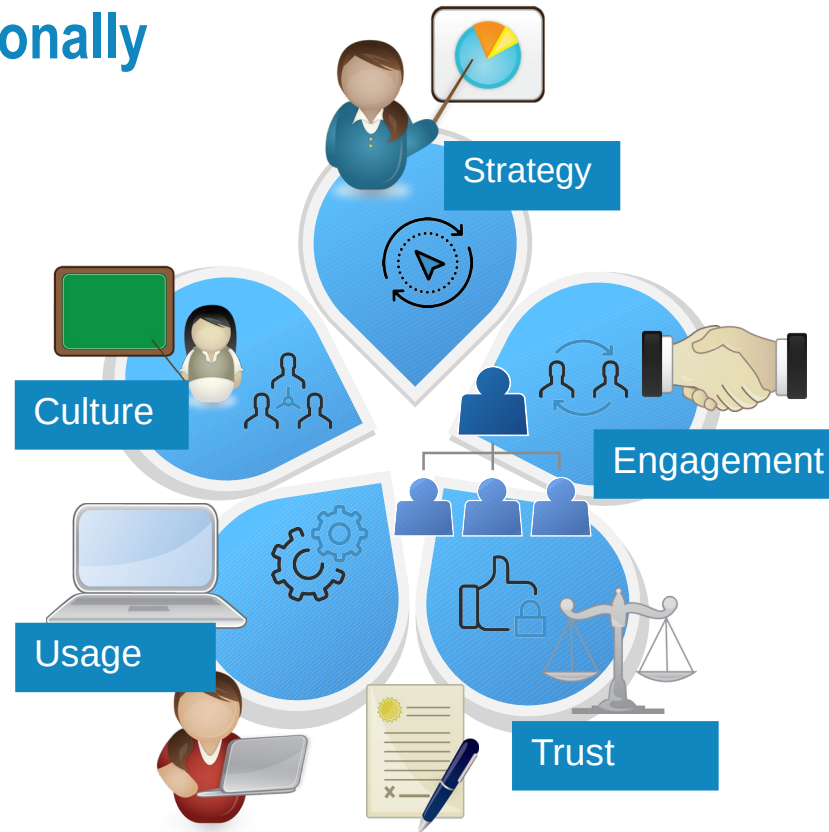


- ▶ Technical
- ▶ Legal
- ▶ Commercial
- ▶ Financial
- ▶ Community
- ▶ HR
- ▶ Strategic
- ▶ (...)



An Approach for Managing Open Source Professionally

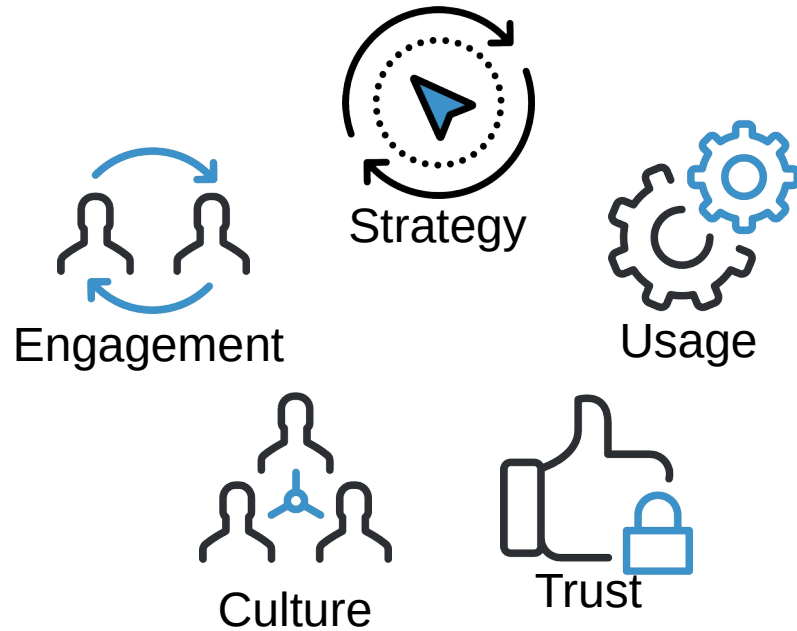
- ▶ Technical
- ▶ Legal
- ▶ Commercial
- ▶ Financial
- ▶ Community
- ▶ HR
- ▶ Strategic
- ▶ (...)



- ▶ Flexible
 - ▶ Shared
 - ▶ Verifiable
 - ▶ Measurable
- ▼
- ▶ Economies
 - ▶ Sovereignty
 - ▶ Responsiveness
 - ▶ Predictability
 - ▶ Scale effects

The OW2 OSS Good Governance Methodology

A Comprehensive Framework for Managing Open Source Software



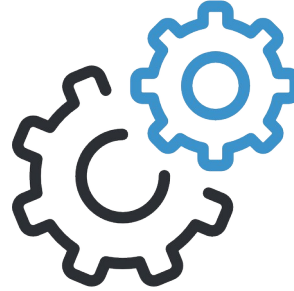
- ▶ A heuristic approach to open source
- ▶ A blueprint for open source policy implementation
- ▶ Five complementary **GOALS**
- ▶ Supported by **CANONICAL ACTIVITIES**
- ▶ Verified by **CUSTOMIZED SCORECARDS**

Key Concepts



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:

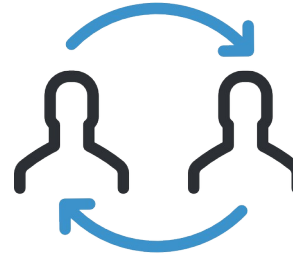
- ▶OSS development principles
- ▶Contributing to OSS projects
- ▶Upstream first
- ▶HR perspective
- ▶Belonging to the OSS community

▶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:

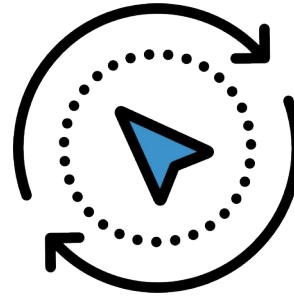
- ▶ Contributing back to OSS projects
- ▶ Supporting OSS communities
- ▶ Publicly asserting use of OSS
- ▶ Contracting with OSS vendors
- ▶ Participating in OSS events

▶ 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

- ▶ Management guidance
- ▶ Experience sharing
- ▶ Progress monitoring and reporting

Blueprint

Goals

Usage



Trust



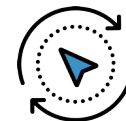
Culture



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



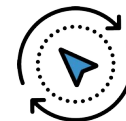
Culture



Engagement



Strategy



Activities and their Scorecards



Completed



In progress



Pending

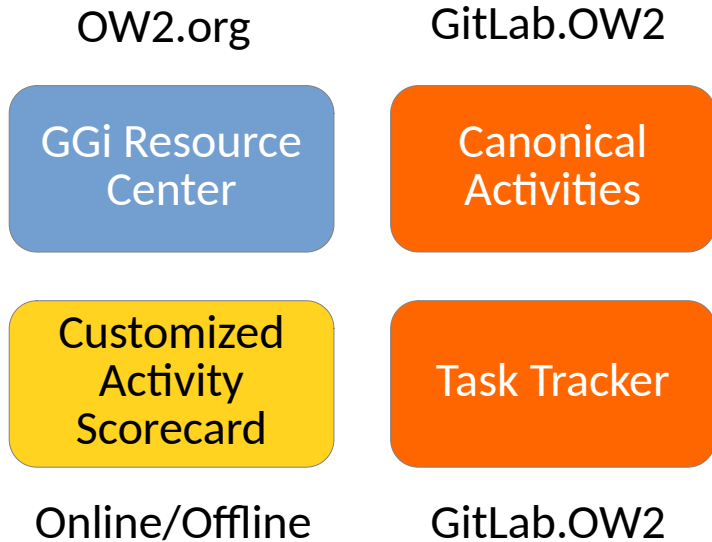


Delayed

Activity J1	Activity T1	Activity C1	Activity E1	Activity S1
Activity J2	Activity T2	Activity C2	Activity E2	Activity S2
Activity J3	Activity T3	Activity C3	Activity E3	Activity S3
Activity J4	Activity T4	Activity C4	Activity E4	Activity S4
Activity J5	Activity T5	Activity C5	Activity E5	Activity S5

Implementing the OW2 OSS Good Governance Methodology

Production System



▶ 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

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 Leader

#5

Promote OSS outside of the company

Decision Maker Need ScoreCard Strategy G

#11

Fund external OSS projects

Canonical Activities

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 Rol 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 Rol 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.

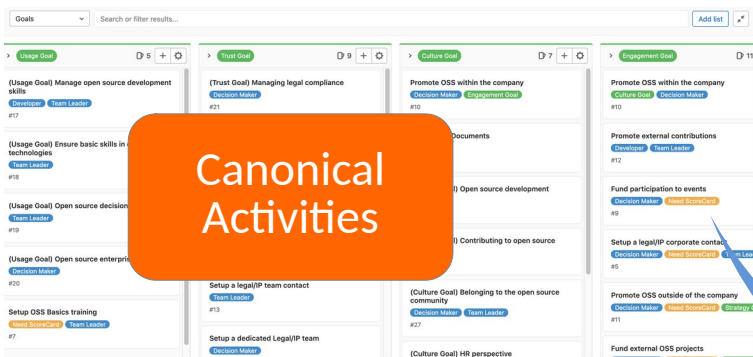
- Inform people about the risks associated with bad licencing.
- Propose an easy solution for projects to setup licence checking on their code base.
- Communicate on its importance and help projects to add it in their CI systems.

Add recommendations here

Resources

Links to resources in the Resource Center

Customizing the Methodology



Canonical Activity

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

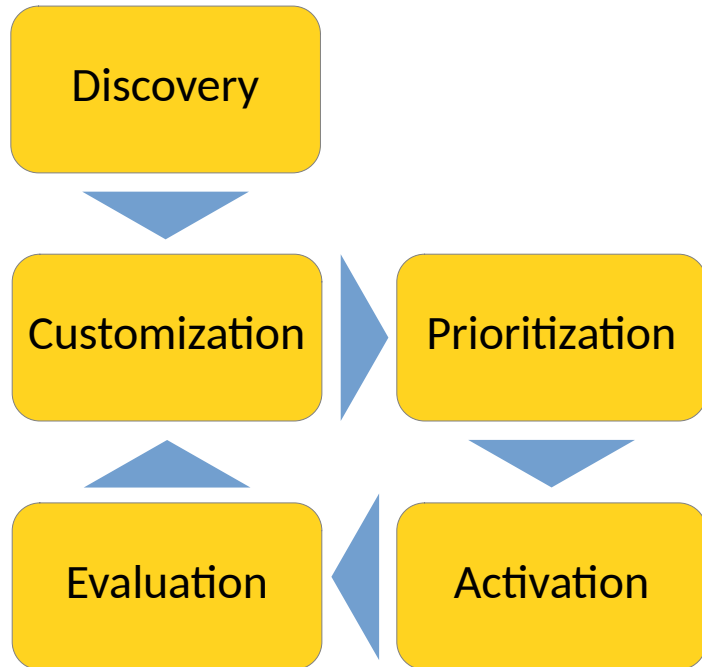
OW2 OSS Good Governance Initiative	THE GOOD EXAMPLE COMPANY	Activity Scorecard																				
<p>OW2 / ACTIVITY Culture 1 Promote open source development best practices Last update: 07/29/21</p>																						
<p>Customized Description: Scope of what has to be done</p> <p>Actively promoting and implementing OSS best practices within the company.</p> <ul style="list-style-type: none"> For THE GOOD EXAMPLE COMPANY promoting open source development best practices means ensuring best practices in an Alpha first. We can start by trying to adopt open source best practices from OW2 MRL OMM form. We can also start by concentrating on Document for Developers, third-party contributors. 																						
<p>Opportunity Assessment: Why is this activity relevant?</p> <ul style="list-style-type: none"> We claim to be developing open source software but lack expertise in how to make it properly open. As a result our open source software attracts no downloads nor third party contributors. Particular needs on Documentation and Licenses It doesn't make it easy to promote the project on the open source scene. Once we have done the job with team Alpha it will serve as an example for the rest of the IT department. 																						
<p>Objectives: What we aim to achieve in this iteration</p> <ul style="list-style-type: none"> Implement state-of-art Licenses and Documentation first in our project AAA. Improve our score on OW2 OMM 																						
<p>Tools: Technologies, tools and products used in the Activity</p> <ul style="list-style-type: none"> We will work with REUSE in a file storage to add licenses on all files libre/reuse software. Check OW2 guidance at "insight" -> "Community". Check the Eclipse XXX project for example as a benchmark. 																						
<p>Operational Notes: Approach, method to progress in the Activity</p> <ul style="list-style-type: none"> Proceed with internal training of Team AAA using existing expertise Regular updates at weekly meetings 																						
<p>Key Result: How we will measure success in this iteration</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Progress</th> <th>Score</th> <th>Personal Assessment</th> </tr> </thead> <tbody> <tr> <td>1. All project AAA files have proper licenses.</td> <td>70%</td> <td>3</td> <td>We are almost done here</td> </tr> <tr> <td>2. Documentation is restructured and completed</td> <td>30%</td> <td>3</td> <td>Progressing but slow</td> </tr> <tr> <td>3. Information on how to contribute to the project is clearly formulated and displayed</td> <td>50%</td> <td>3</td> <td>We now have a clear way to complete this</td> </tr> <tr> <td>4. We improve the MRL score</td> <td>0%</td> <td>0</td> <td></td> </tr> </tbody> </table>			Item	Progress	Score	Personal Assessment	1. All project AAA files have proper licenses.	70%	3	We are almost done here	2. Documentation is restructured and completed	30%	3	Progressing but slow	3. Information on how to contribute to the project is clearly formulated and displayed	50%	3	We now have a clear way to complete this	4. We improve the MRL score	0%	0	
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3. Information on how to contribute to the project is clearly formulated and displayed	50%	3	We now have a clear way to complete this																			
4. We improve the MRL score	0%	0																				
<p>Timeline: 5 iterations, Milestones</p> <ul style="list-style-type: none"> To be completed by end December 2021 																						
<p>Efforts: Time and material budget</p> <ul style="list-style-type: none"> 1/2 Day per week over the next three months 																						
<p>Assignees: Who participates / Leads?</p> <ul style="list-style-type: none"> XX to prepare internal presentation 																						
<p>Issues/Difficulties, uncertainties, roadblocks, points of attention, Dependencies</p> <ul style="list-style-type: none"> This Activity is not making significant progress made on Activity XX 																						
<p>Status: How the Activity is doing</p> <ul style="list-style-type: none"> As of [DATE] the Activity is on hold, waiting for Activity XX 																						
<p>Overall Progress Rating: 50%</p>																						
<p>Need to check progress on Activity XX so as to unlock progress on this Activity.</p>																						
<p>File: Scorecard-Culture1.v1.1.odt Last revision: 07/29/21 By: [] Page: 1/1</p>																						

OW2 OSS Good Governance Initiative	THE GOOD EXAMPLE COMPANY	Activity Scorecard
<p>Insights from the OW2 Activity Forum</p> <p>https://gitlab.ow2.org/gitlab-ow2/ow2-issues/-/issues/25</p> <p>Open</p> <p>(Culture Goal) Promote open source development best practices</p> <p>Description</p> <p>OSS projects have a special, baraaikemodus operandi. In order to allow and foster this collaboration and mindset, some practices are recommended that allow for collaborative, open source development to happen readily.</p> <p>This activity is about defining, actively promoting and implementing OSS best practices within the company.</p> <p>As a starting point the following topics might be considered for attention:</p> <p>Community documents</p> <p>Promote and implement controlled reuse</p> <p>Providing a complete and up-to-date product documentation</p> <p>Configuration Management: git workflows, collaborative patterns</p> <p>Release management: release early & release often, stable development versions, etc.</p> <p>The list of best practices depends on the context and domain of the program, and should be re-evaluated regularly in a continuous improvement manner. Practices should be monitored and regularly assessed to track down progress.</p> <p>Community documents</p> <p>Make sure that all projects within the company propose the following documents:</p> <p>REUSE</p> <p>Documentation</p> <p>Use of software and streamline OSS and</p> <p>people and creating processes that</p> <p>developers are not used to open source development.</p> <p>Progress Assessment</p> <p>Question: Do all projects provide the required information for people to use and contribute to the project?</p> <p>Practice: In those cases where this information is missing, it is recommended to check their documentation for completeness and to fill in the missing information.</p> <p>"Community" - Here is an example.</p>		

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.

The Blueprint

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



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 <i>mgt</i>	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/>



Cedric Thomas, OW2, 2021

OPENCHAIN



TOSIT The Open Source I Trust

Membres fondateurs

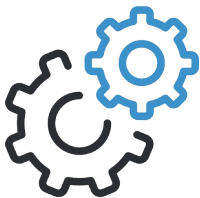


Membres associés



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.



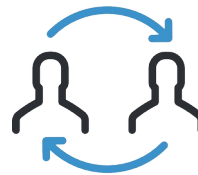
Usage



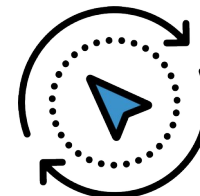
Trust



Culture

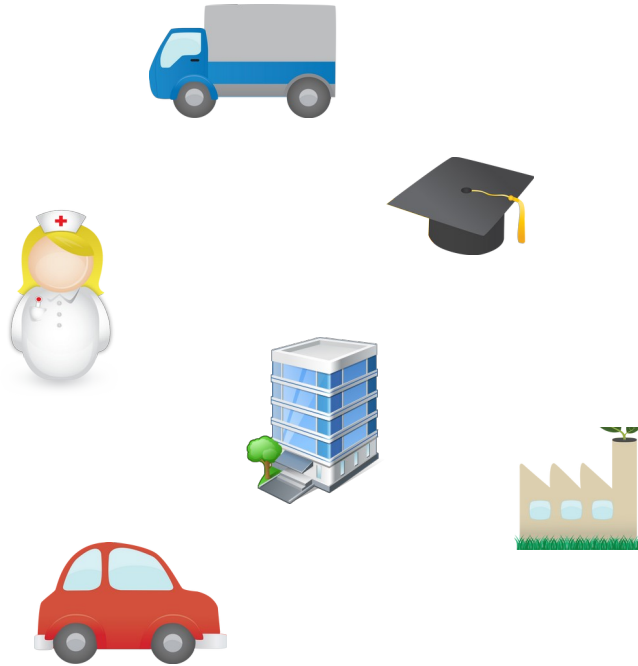


Engagement



Strategy

Three Strategic Objectives



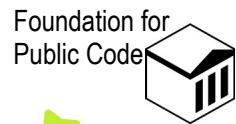
Contribute to defining and promoting the state of the art

Foster a pan-European initiative open to all sectors

Develop a neutral, accessible experience-sharing platform

Reaching Out!

OSPONE ZONE



The Handbook

<https://ospo.zone/ggi/>



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How to get in on it?

Contributing to the methodology...

... Contributing to its dissemination

The screenshot shows the OW2 website with a navigation menu (ABOUT, PROJECTS, INITIATIVES, MEMBERS, NEWS) and a search icon. The main heading is "The OW2 Open Source Good Governance Initiative". A blue banner with white text displays the URL https://www.ow2.org/OSS_Governance. Below this, there is a paragraph of text and a section titled "OSS Good Governance Resource Center" with a sub-heading "The Initiative is developing an OSS Good Governance Resource Center. It is organized in five main sections after the Good Governance Maturity model presented at OW2online'20 (video, slides) on June 18th, 2020." At the bottom, there are five goal categories: Usage Goal (Basic Skills in Using Open Source Software), Trust Goal (Secure and Appropriate Usage of Open Source Software), Culture Goal (Belonging to the Open Source Community at Large), Engagement Goal (Engaging with the OSS Ecosystem), and Strategy Goal (Open Source as a Corporate Strategy).

The screenshot shows the OSPO.ZONE website with a navigation menu (About, Members, GGI, Resources) and a search icon. The main heading is "Welcome to the OSPO.ZONE!". A blue banner with white text displays the URL <https://www.ospo.zone>. Below this, there is a paragraph of text and two orange buttons: "Learn More" and "Join us!".





Good
Governance
an OW2 initiative

Thank You

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