

# Corporate Open Source Management Organic or Controlled?

The manner in which companies interact with open source software ranges from dispersed benign neglect or anarchy to centralized micromanagement. What are the issues and concerns of using or creating open source software as opposed to proprietary software? How do companies address OSS management and OSS issues through Open Source Technology Offices or other mechanisms?

A compilation of areas of concerns, roles, and responsibilities will be presented. Examples of how they are addressed in various companies will be shared.

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# Corporate Open Source Management Organic or Controlled?

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# Agenda

Some examples of how different companies approach the concept of an Open Source Office

- What is Open Source Management
- Roles
- Goals
- Issues commonly encountered
- Lessons learned
- Inferences and conclusions

# Agenda

How a few random companies are approaching open source management

Issues frequently seen

Common lessons learned

# What Is Open Source Management?

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# What is Open Source Management?

The answer you will hear most often is

**COMPLIANCE**

# Compliance

Focused on legal issues

- license choice or approval
- approval of actions and activities
- following license terms
- auditing software
- importing and exporting open source software
- supply chain
- educating employees about compliance

# What is Open Source Management?

A second answer you may hear is

## Using Open Source Software Effectively

This focuses more on business, product development, and engineering topics. But does not ignore legal issues.



# Organization

A company may have an open source project office

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A company may have an open source project office

A company may have an open source engineering department

# Tier One Companies Have Large Dedicated Open Source Teams

Google

IBM

CITRIX

Microsoft

NEC

hp

SAMSUNG

redhat

intel

FUJITSU

ORACLE

twitter

facebook

CISCO

LINUX FOUNDATION

Or Open Source responsibility may be dispersed throughout the organization

# Roles

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# Open Source Office - ROLES

Whether the Open Source Office an actual department or virtual, there are some common roles

If a company is using open source software, but does not have an official Open Source Office, there will still be a de facto virtual Open Source Office

# Roles - Legal

- audit
- compliance
- license guidelines and policies
- patents, copyrights, trade secrets, trademarks
- legal education and training of all employees
- control of OSS (importing, exporting)
- purchasing, supply chain, ODMs
- mergers and acquisitions, spin offs, joint ventures, alliances

# Roles - Business

- OSS strategy
- using OSS effectively
- promote OSS internally
  - measure and explain costs & benefits of OSS to management
- processes and tools
- culture
- Human Resources liaison
- mergers and acquisitions, spin offs, joint ventures, alliances



# Roles - Technical

- open source education and training
- technical education and training
- consulting
- advising
- processes and tools
- encourage and support participation in community
- support OSS (foundations, projects, organizations, community, events, conferences)

# How is an Open Source Office Created?

Many different ways

It often starts in the legal department

Engineering department initiatives may be merged in

A virtual Open Source Office may become formalized

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**Do not let legal run the office - legal normally provides wise advice and risk analysis to a business instead of running it**

To receive the most benefit from Open Source, involve open source practitioners in key roles

The importance of community to open source can not be overstated

For learning about community, like learning a foreign language, immersion is a great teacher. Learning from a book is not optimal.

# Goals

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# Open Source Office - GOALS

An Open Source Project Office should have goals

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**Different goals lead to difference results**

# Goals - examples

The following lists of goals are inferred from various presentations and articles

The lists are not official statements from the companies

The lists are only a partial description of each company at a random point in time



# Goals - example (Disney)

- We want to **enable developers** to do everything they need to do with open source **while managing risk** for the company.
- An enablement philosophy
- Policy that enables rather than limits
- Educate and Trust instead of Limit and Enforce

# Goals result (Disney)

## Pave the path to compliance

- Make it easy to do the right thing
- Make it hard to do the wrong thing
- Use tools to implement policy not people
- Provide easy, efficient, sensible processes and continuously approve

Nigel Simpson, The Walt Disney Company

<http://events.linuxfoundation.org/sites/events/files/slides/Disney%27s%20Open%20Source%20Journey.pdf>

# What did Disney learn?

The next slide is slide 15 from:

<http://events.linuxfoundation.org/sites/events/files/slides/Disney%27s%20Open%20Source%20Journey.pdf>

Nigel Simpson, The Walt Disney Company

# Identifying the Problem: Where We Ended Up

- ▶ ~~Open source is scary~~
- ▶ Open source is core to what we do, we should embrace it!
- ▶ ~~Developers cannot be trusted~~
- ▶ Educated developers can be trusted
- ▶ ~~All code is precious and must never be released~~
- ▶ Sharing code is good for Disney and the open source community, we need to be mindful of what we share
- ▶ ~~Therefore, we must review and control everything~~
- ▶ We must focus on the areas of greatest risk and enable developers to do the right thing

**FRIEND!**

# (Disney) outcome is direct result of goals

Repeating goals:

- We want to enable developers to do everything they need to do with open source while managing risk for the company.
- An enablement philosophy
- Policy that enables rather than limits
- Educate and Trust instead of Limit and Enforce

# Goals - example (Walmart)

- Growth of projects
- Contribute
- Transparency
- Open-source first mentality
- Diversity
- Feedback

# Goals - example (EMC)

- Change Support Attitudes
- Change Legal Attitudes
- Change Engineering Attitudes
- Change Sales & Sales Engineer Attitudes

# Lessons learned (EMC)

- Go Big or Go Home
  - Halfway Measures Are Ineffective
- Culture of Share First
  - Comes from the Top
- Just Start
  - Small Projects & Teams Breed Success



# Goals - example (Microsoft)

- Inform
  - documentation, policies, training, tools, processes
- Connect
  - internally across projects, externally with community
- Support
  - consulting

# Goals - example (Twitter)

- be good open source citizens
- enable engineers
- give back to the open source projects we depend on
- be diligent in investing engineering time to open source projects
- encourage upstreaming
- community building

# Goals - Summary

Very different approaches to goals among the example companies

# Issues Commonly Encountered

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# Issues commonly encountered

- scaling
  - open source office can not be involved in the day to day tasks of everyone else
  - the number of individual contributors is immense
- removing road blocks for individual contributors
- What is the secret sauce?
  - Need to decide what to protect
  - Most companies over estimate what is value add and what is commodity

# Issues commonly encountered

- what level to authorize exporting open source
  - The greater the risk, the higher the level
  - The lower the level
    - the greater your impact on the open source projects
    - individual contributors are more effective
    - better job satisfaction
- communicating legal knowledge, risks, vision, process, values to large number of employees

# Additional Lessons Learned

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# Some lessons learned

- process and policy must scale (control side)
- process and policy must be light weight (developer & business side)
- developers and business people must be educated
- developers must be enabled and empowered
- do not add obstacles for developers
- do not create rules and process that do not allow developers to be responsive while interacting with the community



# Some lessons learned

- risk must be visible and managed
- legal must assist business decisions, not make them
- participate in community to maximize open source value
- buy in and support from upper management is important
- participating in an open source project is more than sending code, sending documentation, reviewing, testing, etc
  - supporting community
  - supporting conferences
  - financial support

# Inferences and Conclusions

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# Impact of OSS office

OSS Office can determine how effectively a company uses open source software

- Over-control leads to
  - difficulty interacting with the community
  - lower level of contribution
  - tendency to dump finished code onto github instead of working with others or developing a community

# Impact of OSS office

OSS Office can set company direction

- can be a consumer
  - pushed around by the currents, winds, and storms of the community projects
- can be an active participant
  - adeptly adapting to the currents, winds, and storms
- can be a driver
  - creating the currents, winds, and storms

# Impact of OSS office

Whether an SOC vendor, a consumer electronics company, a services company, or some other type of company, the choices of an OSS office can

- impact costs
- impact time to market
- result in controlling your destiny or being reactive

# The End



# Review

Some examples of how different companies approach the concept of an Open Source Office

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Questions ???

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