Open Source Initiative 2016 Annual Report

Linux turns 25, is bigger and more professional than ever (Ars Technica) | Federal Source Code Policy Released (U.S. White House) | Sixty-five percent of companies are contributing to open source projects (Black Duck) | Oracle-Google Dispute Goes to Heart of Open-Source Software (New York Times) | U.S. government launches Code.gov to showcase its open-source software (VentureBeat) | Mozilla launches new fund to help keep open-source software secure (ZDNet) | Open source has won, and Microsoft has surrendered (ComputerWorld) | FCC forces TP-Link to support open source firmware on routers (Ars Technica) | Toyota joins IBM and Google as a Patron of Open-Source Software (Fortune) | Nike releases open-source software to play with the techies (TechCrunch) | Brazil to Replace Open-Source Software with Microsoft Products (Softpedia) | New York senator proposes tax credit for open-source developers (The Register) | Microsoft now has the most open-source contributors on GitHub (SilicoANGLE) | Apple double downs on open source (TechRepublic) | Bulgarian Government Embraces Open Source (LinuxInsider) | Russia Weighs Replacing IBM, Microsoft With Open-Source Software (Bloomberg) | Amazon Brings On a New Open Source Guru (Fortune) | San Francisco prepares to open source its voting system software (SF Examiner) | Walmart Labs open sources the application platform that powers Walmart.com (TechCrunch) | Disney has its own Open Source Program (SDtimes) | Ministry of ICT and NITA Uganda Urge on Adoption of Open Source (PC Magazine) | UK Government Recruits Chief of Open Source (Forbes) | GitHub repos now prominently show open-source licenses (VentureBeat) | and so much more...!

New Director, Molly de Blanc
New Director, Josh Simmons
New Director, Italo Vignoli
Twelve New Affiliate Members
First Annual Fund Drive
New Volunteer Staff & Interns
OpenSummit: Open Source in Edu
White House, San Francisco Elections Committee & NYC Council Testimony

Five New Working Groups
Expanded Affiliate Program
Expanded Conference Participation
Broadened Organizational Support
OSI Expands to Africa, China & India
Expanded Presence at Conferences
Open Source License API
MESSAGE FROM ALLISON RANDAL, OSI PRESIDENT

The world has changed tremendously in the past few decades. Today, open source is a powerful force of innovation. It is the very heart of the Internet, both the servers that drive it and the devices that connect to it. Open source is the digital lifeforce of smart phones, smart TVs, smart watches, tablets, phablets, cameras, light bulbs, 3D printers, in-flight entertainment, cars, IoT, crypto currencies, big data, AI, and more. In 2010, people started to declare open source had "won", as corporate adoption passed the 50% mark, on toward 80% in subsequent years.

Yet, we still have much to learn. We're learning more about how to grow and maintain healthy communities, especially at scales of thousands of contributors. We're learning the best ways for companies to participate beneficially in open source projects, and at the same time the best ways to explain beneficial participation. We're learning to let go of the quest for the holy grail of a perfect "open source business model", and set our sights on the greater quest: if all software was open source, then every business model involving software would be an open source business model. That may sound unlikely, but reflect on the fact that the value for customers has never been in the few hundred characters of text granting them a "proprietary license" to the software, that's just not what they're paying for. Customers pay for solutions to problems, they pay for support, services, content, assurance of security and reliability, for lessening the pain of consuming technology through software and hardware integration, long-term stable updates, or software deployed as a service (IaaS, PaaS, SaaS, etc). The proprietary license never really had any value at all, it was merely an illusion. More and more companies are realizing this, whether they're in the business of selling technology, or in a business enabled by technology.

As I look to the future, the potential to transform the software industry looms large, but the potential to change lives for the better looms even larger. The core principle of open source is software freedom, which is user freedom, and freedom for human beings. Open source is more than just a force of innovation, it is a force for humanitarian good. From software that runs medical clinics, to software that tailors inexpensive 3D-printed prosthetic limbs, to software revolutionizing the clothing industry with more humane methods of production and less waste, there are a million ways open source makes lives better. We've only touched the beginning of what's possible.

Here's to the next 30 years of software freedom!

UPDATE FROM THE GENERAL MANAGER

Hello again! As I expect you all feel too, with open source development and innovation happening so fast and across so many fields of endeavor, it's always a bit surprising when we step back and find another year has passed. We've seen tremendous growth, in both open source awareness and adoption, and also in maturity across the broader IT sector. As open source has taken hold, organizations are now beginning the important work of integrating and operationalizing internal processes and practices to leverage the value of not only open source software and communities, but the open ethos as well.

In the U.S., the Federal Source Code Policy and resulting Code.gov initiative highlight the continued investment by governments around the world to increase their pace of innovation, reduce costs, improve quality and eliminate redundancy to improve services to their citizens. Bulgaria, China, France, India, Italy, Lithuania, New Zealand, the United Kingdom, and local governments in Bern, Boston, Nantes, New York, Paris, Pesaro, San Francisco, Turin, Umbria, Valencia, and many more, are reaching out to the OSI and our Affiliate Members to understand best practices in development, address licensing concerns, build community and—as we might expect from those threatened by, or looking to take advantage of, continued adoption—address FUD, and ensure authenticity.

I am so grateful and inspired by the continuous support and enthusiasm from across the globe for our mission and our work. Over 2016 we've enjoyed significant interest and growth in our Affiliate Program, Working Groups and Incubator Projects from organizations around the world working in a variety of fields. Importantly this has been driven, not only by those new to or just entering the open source software community, but also by highly experienced users shifting to roles as developers, or active contributors now spinning up their own projects.

For me, this highlights the importance of an evolving role with the OSI—responding to the needs of a maturing movement—while holding fast to our core mission: to educate about and advocate for the benefits of open source software, and to build bridges among different constituencies. Thank you, and have a great 2017!

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The Open Source Initiative

Founded in 1998 as a global non-profit, The Open Source Initiative (OSI) protects and promotes open source software, development and communities; champions software freedom in society through education, collaboration and infrastructure; stewards the Open Source Definition (OSD) and; prevents abuse of the ideals and ethos inherent to the open source movement.

Mission Statement

The Open Source Initiative is a non-profit corporation with global scope formed to educate about and advocate for the benefits of open source and to build bridges among different constituencies in the open source community.

Open source is a development method for software that harnesses the power of distributed peer review and transparency of process. The promise of open source is higher quality, greater reliability, more flexibility, lower cost, and an end to predatory vendor lock-in.

One of our most important activities is as a standards body, maintaining the Open Source Definition for the good of the community. The Open Source Initiative Approved License trademark and program creates a nexus of trust around which developers, users, corporations and governments can organize open source cooperation.

Organizational Scope

Developers & End-Users
- Independent developers working on FLOSS projects.
- Developers working on open source software within corporations.
- Developers who work creating FLOSS both as part of their employment and on their own time.
- End-users seeking information on open source software & licenses.
- Members of the press.

Government Agencies, Education & Non-profits
- Procurement and acquisition officers investigating and assessing feasibility of open source software.
- Department managers seeking best practices in development and community.
- IP portfolio managers seeking to release code under an open source license, or take in contributions.
- Business analysts seeking peers, use cases and case studies.

Corporations & Business
- Companies with licensing questions and issues of stewardship.
- Project / Product managers in need of best practices, resources, information & knowledge sharing.
- Legal staff and contract managers using and maintaining open source software.
- HR and other administrative departments involved in transitioning to open source models.

The Open Source Initiative is internationally recognized as the primary source for expertise on matters related to open source software, development & standards.
Operational/Organizational Highlights

In 2016 the OSI welcomed three new Directors, Molly de Blanc and Italo Vignoli, who were elected to Affiliate Member seats, and Josh Simmons, who holds an Individual Member seat. Molly was formerly with the Open edX Project, serving as their Community Coordinator, and now works with the Free Software Foundation. Italo is a founding member of The Document Foundation and Associazione Libretitalia, where he handles LibreOffice PR and media relations, in addition to coordinating the certification program. Josh currently works in Google's Open Source Programs Office supporting community development as part of the outreach team. Prior to that, he served as O'Reilly's community manager for OSCON.

Italo, Josh and Molly's diverse backgrounds and expertise highlight the expanding needs within open source communities in support of open source projects. The OSI still fields many requests for support around traditional topics—licensing and legal issues, development methods and technologies, business adoption and models—but increasingly we're finding more projects, and the organizations involved, need broader support: expert advise around community development and management, marketing and communications, fund-raising, events, etc.

The OSI Board's broad experience and expertise reflects the diversity of the open source community and it's current needs—a clear benefit of our shift to a member-led organization, where those working in open source drive open source.

Flow of Funds: Profit / Loss 2008 - 2016

The OSI would like to thank all of our generous sponsors and supporters who have graciously donated their technology, time and resources to keep our infrastructure running throughout 2016.
The OSI was honored to welcome seven new Affiliate Members, bringing our total to over 60, with representation now on every continent: Breathing Games, promotes respiratory health through open source medical resources; Darbar Group of Institutes, Indian institute of higher education offering a broad curriculum on, and through, open source software; Internet Systems Consortium, the home of BIND, ISC DHCP, Kea and others; Odoo Community Association, supporting Odoo and the development of Odoo features; Open edX, the open source platform behind Harvard & MIT's EdX learning environment; Powering Potential, extending education in Tanzania through open source & solar powered computer labs, and; sysarmy, bringing together the Argentinian system administration community.

Continuing our engagement in community-driven events, the OSI participated in a variety open source software and technology-focused conferences, including: Community Leadership Summit, Educause, Games in Education, Greenville JUG, LibrePlanet, Linuxfest Northwest, FOSDEM, FOSSETCON, Open Apereo, Open Everything, Open Source Festival, Open Summit, OSCON, OSCON Europe, Paris Open Source Summit, SCaLE, SoCalMakerCon and Start-Up Libre.

Recognizing the power of “acting locally”, the OSI initiated “OSI Chapters” where those working in the same region or with similar organizations can meet and promote open source software as driven by local interests.

The OSI continued our work in defending the open source software movement and protecting the open source label by confronting the ongoing use of “Fear, Uncertainty and Doubt” (FUD) to challenge open source adoption, as well as, “open-washing” and “fauxpen source software” by nefarious marketeers.

Once again the OSI held our annual membership drive, with 60 new members joining to support our mission to raise awareness and adoption. The OSI also held our first fund drive, raising almost $6,000 from 70+ contributors over the two week effort.

The OSI's social media presence continues to grow, with the OSI wiki user community now over 1,500 users online. Followers of @opensourceorg on Twitter now number over 18,000.

The OSI blog published thirty-four posts, covering topics ranging from announcements of new Affiliate Members and other organizational business, to advocacy and policy statements on government procurement practices, civic accountability and transparency, fact checking of the press, and front line stories on the adoption of open source within education, government and business.

In addition to the two fiscal sponsorships with OpenHatch and Snowdrift.coop already in place, the OSI is working with the Journal of Open Source Software to assess their needs for financial support.
Business Highlights

- Ensuring the authenticity of open source software requires the protection of the OSI brand. In 2016, the OSI continued our global effort to protect the **OSI trademarks through registration** in Australia, Canada, China, European Union, Hong Kong, India, South Korea, Taiwan, and the United States of America.
- The OSI reached out to a variety of businesses to clarify compliance related to the use of the OSI logo, open source label and open source licenses, including Bahmni, BlueJeans, Centre Juridique, CryptLib, Digisapi Technologies, Free and Fair, GitLinks, GPGTools, Indiegogo, Ikea, Kickstarer, Mycroft, Onalytica, OpenCamps, OpenCV, openExpo, OpenFarm, Opening Doors, The Open Source, Open Source Design, Open Source Open Standards Conference, relayr, ScriptBasic, Stack Exchange, The Sun, Target, The Things Network. We thank all of these organizations for their willingness to listen, and openness to addressing the concerns of the open source community.
- Again in 2016, the OSI sponsored and participated in the **10th annual Future of Open Source Survey**.
- Extending our work in assessing the adoption of open source software, the OSI also collaborated with GitHub on their forthcoming open source survey.
- Partnering with the Open Invention Network, Start-up Libre introduces open source software options to entrepreneurs seeking ways to reduce capital expenditures while increasing innovation.
- The OSI approved the The Universal Permissive License (UPL), submitted by Oracle, and the OSET Public License version 2.1, submitted by Open Source Election Technology Institute (OSET).
- OSI developed a machine readable publication of OSI approved licenses at api.opensource.org. This will allow third parties to become license-aware, and give organizations the ability to clearly determine if a license is, in fact, an Open Source license, from the authoritative source regarding Open Source licenses, the OSI.
- The OSI offered a viewpoint on, “**Principles of Digital Rights Management (DRM) Nonaggression for Open Standards.**” stating “In order to make open source implementations possible, an open standard that involves DRM needs an agreement from the standards body and the authors of the standard not to pursue legal action for circumvention of DRM.”
- Continued work occurred within a variety of business-specific, OSI sponsored, incubator projects and working groups. The Beyond Licensing working group aims to draft a simple statement of principles of open source, inspired by the Open Source Definition, but addressing topics beyond copyright licenses. This work seeks to develop, FOSS Organizational Models Metrics—a common framework for evaluating open source governance, definitions of common terms in open source, legal considerations (copyright, employment agreements, patents, trademarks, etc.). The Practices in Open Source Software Crowdfunding working group began a monitoring campaign to review and notify projects on crowd-funding sites when ambiguity/mis-labeling/abuse occurred related to the open source label or licensing. The OSI added links to incubator project TL;DR Legal to the OSI index of approved licenses.
- The OSI released a statement on the, “**Importance of Community-oriented GPL Enforcement,**” emphasizing, “When GPL enforcement (or any free software and open source license enforcement) is done in a way that isn’t community-oriented, that action can be actively harmful to freedom-focused communities, and to the relationship of trust between our projects and their individual, organizational, and corporate users.”
Educational Highlights

- The OSI was pleased to welcome, **Powering Potential** as a new Affiliate Member in 2016. Powering Potential provides schools in rural Tanzania with solar-powered computer labs driven by open source software. The program also provides a variety of openly licensed educational resources.

- **Open edX**, the open source course management system, originally developed for Harvard and MIT’s Massive Open Online Courses (MOOCs), joined the OSI as an Affiliate Member.

- The **Rensselaer Center for Open Source**, a community of open source developers at Rensselaer Polytechnic Institute, joined the OSI Affiliate Member Program as our first student group.

- The **Darbar Group of Institutions**, a consortium of primary and secondary schools in Karnataka, India, offering courses in both using and developing open source software, joined the OSI as an Educational Affiliate.

- The OSI was pleased to support the work of the **Software Heritage** project, preserving 30 years of free and open source software, and making it accessible to future generations of developers and researchers.

- The **Journal of Open Source Software** (JOSS), joined the OSI. JOSS is an academic journal with a formal peer review process that is designed to improve the quality of open source software.

- The OSI provided support for the **University of Skövde’s** LIM-IT project which addresses challenges for those working within open source: vendor/systems lock-in, interoperability, and long-term maintenance.

- **FLOSS Desktops For Kids** saw continued interest and growth from across the U.S., including, Siena College (NY), Albany Urban Scholars (NY), St. Louis schools (MO), and Orange County Boys and Girls Club (CA).

- In partnership with Affiliate Member, the **Apereo Foundation**, **New York University**, and **Red Hat**, the OSI co-organized the **Open Summit**, a conference bringing together open initiatives across higher education to identify common principles and practices that foster community, collaboration and co-creation.

- The OSI presented with OSI Affiliates **Creative Commons** and **Apereo Foundation** at the **Educause**’s 2016 National Conference. Session topics covered open licensing, and principles and practices that enable collaboration, contribution, and community in open initiatives across the academy.

- Working with OSI Educational Affiliate, the **University of Southern Queensland** and the **OERu**, the OSI began development of a college-level, openly licensed, “course pack” based on former OSI Director Karl Fogel’s text, **Producing Open Source Software**.

- OSI Directors and staff have provided multiple lectures and consultation on open source software licensing, development practices, and community management at several institutions of higher education, including, **Baker University; Brandeis University; California State University; Concordia University, John Molson School of Business; City of Liverpool College; Rensselaer Polytechnic Institute; University of Illinois at Urbana-Champaign; Siena College; University of Minnesota; State University of New York at Albany, School of Business.**
Public Policy Highlights

Interest in open source software, open source projects, and open source communities grew across all levels of government around the world. The OSI worked with several local and national organizations to advocate for the adoption of open source software, increase the understanding of open source software within public institutions and cultivate community across agencies and departments.

- Working with the U.S. Army Research Lab and U.S. Department of Defense, the OSI offered assistance to address concerns around, and remedies for, issues related to public domain, CC0 and US copyright law.
- In response to the U.S. Federal Communications Commission’s (FCC) “methodology for the Measuring Broadband America program”, the OSI provided clarification around the definition of open source software and the availability of software licensed under the General Public License (GPL) for commercial use.
- In partnership with a variety of Free and Open Source advocacy groups, the OSI continued our work to inform the FCC on the immeasurable value in experimentation, innovation, and freedom the wireless space.
- OSI Director Paul Tagliamonte provided commentary to the New York City Council in consideration of the Free and Open Source Software Act and the Civic Commons Act. These bills would increase the use of free and open source software by New York City departments and agencies.
- OSI General Manager, Patrick Masson provided guidance on factual matters related to open source and free software to New York State Senator Daniel Squadron regarding Senate Bill 161, which allows a tax credit for expenses associated with the development of open source and free software licensed programs.
- Throughout 2016 the OSI helped promote the development of an open source elections system by the City and County of San Francisco in collaboration with the San Francisco Elections Commission.
- The OSI released the first report in a series by, Aaron Williamson, and sponsored by OSI Affiliate Mozilla Foundation in partnership with the Software Freedom Conservancy, for FOSS Nonprofits dealing with the U.S. Internal Revenue Service.
- The OSI provided comment to the European Commission (EC) as part of their public consultation regarding the ’future of the Internet’ initiative.
- Invited by the French Government, the OSI participated in the “Free/Open-Source Contribution Policy Workshop” as part of the “Open-Government Summit”, a partnership of 70 countries and hundreds of civil society organizations that promote transparency, citizen participation and democratic innovation.
- Considering how much of the current Web consists of open source software (a trend that only continues to grow), the OSI provided comment to the World Wide Web Consortium (W3C), “Principles of DRM Nonaggression for Open Standards”, as part of the DRM nonaggression covenant for their open standards working groups.
- The OSI was honored to congratulate and participate in the Free Software Foundation Europe’s 15th anniversary celebration.
- The OSI wrote an "opinionated" summary in response The Sun’s article on Jeremy Corbyn’s Digital Democracy Manifesto and inaccurate statements regarding open source.
- The OSI offered consultation to the Inter-American Development Bank on open source development practices, National Computer Board – Mauritius on their “National Open Source Policy and Strategy.”
OSI Membership & Community

- In 2016 the OSI community grew to 800+ Individual Members and contributors from over fifty-seven countries.
- Affiliate Members, including non-profits, institutions of higher education and user groups, are located on every continent.
- Donations through memberships and fund-raising reached $20,091.94 in 2016.

Current and Emeritus Members and Observers of the OSI Board

Eric S. Raymond & Bruce Perens, Co-Founders

- Matt Asay
- Brian Behlendorf
- Deborah Bryant (Current)
- Ken Coar
- Danese Cooper
- Molly de Blanc (Current)
- L. Peter Deutsch
- Chris DiBona
- Karl Fogel
- Richard Fontana (Current)
- Bdale Garbee
- Rishab Aiyer Ghosh
- Mike Godwin
- Harshad Gune
- Zak Greant
- Leslie Hawthorn (Current)
- Joichi Ito
- Jim Jagielski
- Fabio Kon
- Laura Majerus
- Patrick Masson (Current, GM)
- Raj Mathur
- Martin Michlmayr
- Mike Milinkovich (Current)
- Ian Murdoch
- Russell Nelson
- Nnenna Nwakanma
- Andrew Oliver
- Simon Phipps
- Dr. Ernest Prabhakar
- Mark Radcliffe (General Counsel)
- Allison Randal (Current, President)
- Larry Rosen
- Tim Sailer
- Chip Salzenberg
- Alolita Sharma
- Josh Simmons (Current)
- Bruno Souza
- Paul Tagliamonte (Current)
- Michael Tiemann
- Guido van Rossum
- Italo Vignoli (Current)
- Luis Villa
- Dr. Tony Wasserman
- Dr. Sanjiva Weerawarana
- Stefano Zacchiroli (Current)

Contact the OSI about how you can help promote and protect open source software development and communities

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Mike Milinkovich
Treasurer, OSI
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SPONSORSHIP OPPORTUNITIES

The Open Source Initiative (OSI)

California 501(c)3 non-profit raising awareness and adoption of open source software (OSS) through **advocacy, education** and **building bridges** between communities.

The pragmatic community organization that understands how **developers, businesses, governments**, and open source interact.

Steward of the **Open Source Definition**, globally recognized body for **approving OSS licenses**.

**Sponsorship Goals**

Corporate use of, and participation in, open source development is vital to overall success.
Provide a open and transparent mechanism to allow corporations to show support for open source software, its development, and the activities of the OSI.
Increase the diversity of stakeholders and viewpoints within the OSI & among OSS community.
Raise funds for the operations of the OSI.

**Use of Funds**

Continue OSI's core activities, per our bylaws, of education, advocacy, community building ...and, of course, continue our license certification programs.

Mature as a sustainable organization ensuring operational constancy and program continuity.
Maintain a (small) professional staff.

**Support**

Corporate support consists of annual donations to the OSI.

Contributions vary by the annual corporate revenue from the total of all affiliated companies.

Sponsorship tiers makes it affordable for smaller companies to show their support of the OSI.

Our goal is to create a large and diverse corporate membership.

These contributions are in United States Dollars.

**Recognition**

The OSI recognizes the donations and support of our Corporate Sponsors through acknowledgements in all OSI events (conferences meet-ups, etc.), communications (mailing lists, newsletters, social media, etc.) and publications (brochures, reports, websites, etc.).

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<th>Annual Corporate Revenues</th>
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**For more information, contact:** Patrick Masson (masson@opensource.org), 855 El Camino Real, Ste 13A, #270 Palo Alto, CA 94301 United States (415) 857-5398
We opened the door to a movement in 1998...

...we hope you’ll join us in 2018.

The Open Source Initiative will celebrate our 20 year anniversary in 2018.
For more information see: opensource.org/20years