

an investment in INFRASTRUCTURE, INTERACTION & INTEGRITY

I love
open source
& want to help

I support
open source
software
and the OSI

I support the free & open source movement

**Because I
believe in
open source**

Open is the better way

Open Source is an idea that has
changed the world for the better
The OSI helps keep that idea alive

Wow. Been seeing a ton of tweets from
@OpenSourceOrg the last few weeks
Glad to see it's getting some energy back

I deeply believe in
the OSI mission

OSI
represents
hope

I am a firm believer in what the OSI,
and other open source communities,
are doing to keep software transparent

I want to help the OSI because it is time to give back after all the support they have provided

**The OSI is
redefining
business**

I have enjoyed the benefits
of open source for many
years and, now an open
source contributor, would
like to help support the
open source infrastructure

Open source
shapes our future

The OSI promotes and protects

**The open source
movement needs
this kind of support**

The future depends on new
ideas, alternatives and paradigms

**open
source**

Open source
software also
spurs innovation
and collaboration
allowing different
people to
experiment with
their own ideas
about how the
software
could work

Open Source Initiative
provides a powerful
community
from across the globe

Over the past year the **Open Source Initiative** (OSI), with the help of our active community of Individual and Affiliate Members as well as our generous Corporate Sponsors and Supporters, has re-invested in our **infrastructure** to increase **interaction** with the open source community, ensuring our continued role in promoting and protecting the **integrity** of open source.

2014 HIGHLIGHTS

General Manager Hired	New Board Directors Elected
New Affiliate Members Approved	Additional Corporate Sponsors
Growing Individual Memberships	Expanded Affiliate Program
Increased Community Presence	Improved Technology Services
Revitalized Communications	Active Conference Participation
Novel Volunteer Opportunities	Broadened Organizational Support
Directed Awareness and Advocacy	Engaging Partnerships

Open Source Initiative 2014 Annual Report



MESSAGE FROM THE PRESIDENT



The Open Source Initiative is undergoing a transformation to better serve the global open source community. Five years ago, OSI was a small, board-only organisation serving almost exclusively as the arbiter of the compliance of copyright licenses with the OSD (Open Source Definition). That role had proved highly effective in the decade since its inception, but the Board of Directors at that time felt OSI should return to its original vision of advocacy for open source software, for two reasons. First, stewardship of the OSD was more likely to be sustainable in the long term as part of a more energetic organisation. Second, the enormous success of the open source software vision meant a large global community of users and deployers of open source software existed, a community ready to unite for good.

In that context, 2014 was a turning point for OSI. Our decision to hire a General Manager started to bear fruit both in the form of a growing membership and of heightened activity. We saw news from new Affiliates appearing daily, profiles of individual members inspiring us through the newsletter and both categories of members bringing forward new ideas like the curriculum for further education and the hosting of OpenHatch. We also saw more corporate sponsors than ever before generously offering funds to support our growth. That meant we had the resources both to promote open source and to challenge abuses of the term around the world.

I continue to believe that the OSI's positive and pragmatic approach to enabling the spread of software freedom is crucially important to society. Open source licenses give permission in advance to use, study, improve and share software, so that there's no need to seek permission elsewhere. That liberates us all to innovate and to make things better with technology. When an OSI-approved open source license accompanies code, we know that it's OK both to use it ourselves and to collaborate with others.

That combination of effective change at OSI and tangible value of its approach leaves me excited about 2015 and the years ahead. As a member or sponsor of OSI, you are part of an ongoing revolution as the meshed society -- every person everywhere able to play the most appropriate role collaboratively with others -- displaces outdated approaches. Your involvement, both practically and financially, is vital to our success advancing change. Thank you!

MESSAGE FROM THE GENERAL MANAGER



First, let me start off by thanking all of you in the open source software community for your tremendous support and help throughout my first year with the Open Source Initiative. It has been quite a transition for me, moving from the formality and conventionalism of institutions of higher education, to what in many ways feels like a start-up. I'm truly fortunate—the OSI and the open source software community are energetic, creative, smart and for me personally, motivational. I was honored to join the OSI in November 2013, thrilled to work with the Board and our members this year, and excited about the possibilities and opportunities in 2015.

I also want to thank you for taking the time to review our first annual report. Indeed, the fact that we have published such a document highlights our emphasis for 2014 and one of the primary drivers for hiring a GM—developing sustainability to ensure continued service, and building capacity to support the growing open source software community.

Throughout 2013 we have worked hard to improve our infrastructure, not just the technology systems that underlie our day-to-day operations and enable growth, but also the policies and processes that define the OSI and allow us to promote and protect the community.

I'm proud of the work we have done over the last year and—with your support and help—look forward to continued success. Open source software is enjoying significant growth in adoption and participation across all industries: the OSI and I are ready to serve that growing and diverse community.

OSI BOARD OF DIRECTORS



Corporate Sponsors

Adobe
AgilePR
Blackduck Software
Blindside Networks
DLA Piper
Engineering Group
Google
Hewlett-Packard
IBM
NGINX
Twitter
XWiki



Affiliate Membership

ADMB Foundation
Aperero Foundation
Association Francophone des Utilisateurs de Logiciels Libres
BigBlueButton
CENATIC
Creative Commons
Debian
DemocracyLab
The Document Foundation
Drupal Association
Eclipse Foundation
FreeBSD Foundation
Friends of OpenDocument
inBloom
Joomla (Open Source Matters, Inc.)
KDE eV
Linux Foundation
Linux Fund
Linuxfest Northwest
MariaDB Foundation
Mozilla Foundation
The New Zealand Open Source Society
OpenHatch
Open Source Electronic Health Record Alliance
Open Source Software Institute
Open Source Sweden
Outercurve Foundation
OW2
Plone Foundation
Puerto Rico Python Interest Group
Python Software Foundation
Sahana Software Foundation
SOUJava
Tiki Software Community Association
TYPO3
Wikimedia Foundation
Wikiotics
WordPress



The Open Source Initiative

The OSI website enjoys 2.3 million unique visitors a year. Ten new people follow the OSI Twitter account each day. The OSI Newsletter is delivered to 2,500 contacts. The OSI and OSI Board participate in a variety of conferences and meetings internationally. The OSI is referenced dozens of times annually in the press and media.

The Open Source Initiative

Founded in 1998, the Open Source Initiative (OSI) promotes and protects open source by providing a foundation for community success. It champions open source in society through education, infrastructure and collaboration. The OSI is a California public benefit corporation, with 501(c)(3) tax-exempt status.

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 better quality, higher 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

Portfolio managers seeking contributions and intellectual property transfer

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

YEAR IN REVIEW

Operational/Organizational Highlights

- The OSI hired its first employee, Patrick Masson, formerly Chief Technology Officer with the University of Massachusetts Office of the President, was named General Manager to help build capacity and ensure sustainability.
- Continuing the shift to a membership-driven organization, three new Board Directors were elected by the Individual Membership, Leslie Hawthorn, Allison Randal and Richard Fontana, as well as one, Stefano Zacchiroli, from the Affiliate Membership.
- Investment in OSI infrastructure continued. Focused on consolidation: our CRM system was overhauled and updated; a new community wiki was deployed; our social media and other external accounts were centralized (Gmail, Google+, Google Analytics, Facebook, LinkedIn, Twitter); we developed several fund-raising sites (AmazonSmile, Benevity, EasyMatch, Flatrr, etc.); an online storefront offering OSI merchandise went live; a tool for press releases was implemented; web-conferencing is now available to the OSI and our community; a document management model was implemented, an elections system was identified and tested, and; we have begun our work to redesign the OSI website.
- In addition to the long standing, and generous support of DLA Piper who provides pro bono legal services, AgilePR has stepped forward with pro bono support for public relations.
- The OSI has adopted a portfolio of services model to manage its internal operations and strategic initiatives, each managed by a Board Director. These include: Corporate Sponsorship; Education & Training; Identity; Incubator; Infrastructure; License Approval; Marketing & Communications; Membership, and; Trademark Stewardship.



OSI Board Directors attend breakout session at OSCON 2014

OSI @OSCON:



New OSI member at OSCON



*New OSI Corporate Sponsor
Engineering Group at OSCON*



New OSI member at OSCON

Community Engagement

- The OSI increased its participation in community-driven events, including presentations and presence at various open source software and technology-focused conferences, including: Educause; Community Leadership Summit; FOSSETCON; Open Apero; Open Source Festival; OSCON; and SC14.
- Membership benefits were extended to include membership cards, free and discounted magazines and texts, conference discounts, etc.
- Communications increased dramatically with the OSI publishing six newsletters throughout the year, a significant increase in Twitter activity (and resulting followers), several blog posts, ten press releases regarding new Affiliates, Sponsors and initiatives, as well as multiple interviews and guest articles in the technology media.
- The OSI is proud to welcome new Affiliate Members: ADMB Foundation; BigBlueButton Foundation; Democracy Lab; inBloom; Linuxfest Northwest; Open Source Electronic Health Record Association; OpenHatch; Puerto Rico Python Interest Group; TYPO3; and WordPress in addition to another eight inquires/applications.
- The OSI updated the successful Affiliate Membership program to include educational institutions, government agencies and user groups.



OSI booths at FOSSETCON & OSCON | Director Leslie Hawthorn delivers OSCON Keynote | President Simon Phipps with Tim O'Reilly
New OSI marketing/promotional materials | EDUCAUSE Open Communities Reception

- We are extremely grateful for our current Corporate Sponsors—Adobe, Black Duck Software, Craigslist, HP, IBM, Google and Twitter—and very excited to welcome our new sponsors—Blindside Networks, Engineering Group, Linux Journal, NGINX, and XWiki.
- The Board, with the help of AgilePR developed and implemented new messaging to be used in all OSI communications.
- Our Incubator program was successfully launched with several organizations and individuals expressing interest, with two of particular note actively engaged with the both the OSI and broader open source communities:
 - The Free Libre Open Works (FLOW) Syllabus: A curated collection for learning resources organized to advance professional competencies relating to Free/Libre/Open Works.
 - US Tax Exemption Working Group: in partnership with the Software Freedom Conservancy, the initiative is focused on tax exemption issues for open source software related organizations in the United States.
- In addition to our Affiliate Members, during 2014 the OSI extended our outreach through partnerships with peer organizations, including: Asahi Net International; Educause; The Electronic Freedom Foundation; ESUP-Portail; IMS Global; The Free Software Foundation; New York University School of Law; OSCELOT; Red Hat; Society for Learning Analytics Research; The Software Freedom Conservancy; University of Massachusetts; and University of Southern Queensland.

Mission/Mandate

- As marketing and promotion of open source software increases, so too does the misuse of the label “open source,” often referencing software not carrying an OSI Approved License. The OSI has engaged those organizations and companies to address issues related to improper or ambiguous use of the open source label and misrepresentation of open source software.
- Recognizing the growing interest in open source software and the desire of many people, organizations and companies to associate themselves with the OSI, we have expanded our protection of the OSI brand and marks (e.g. the “Open Source Initiative” name, “Keyhole Logo,” etc.) through trademark registration in multiple countries in Asia, the European Union, Latin America and North America.
- Working with the Electronic Freedom Foundation and the Free Software Foundation, the OSI filed a amicus curiae brief in Alice Corp. v. CLS Bank with the United States Supreme Court. Also, with help from New York University Law School, an amicus brief was submitted on our behalf to the United States Supreme Court in the matter of Oracle v. Google.
- In solidarity with dozens of technology organizations, the OSI joined the Net Neutrality campaign, sponsoring the “Reset the Net” effort.
- The OSI introduced and successfully managed a Fiscal Sponsorship program, highlighted by our work with OpenHatch.

Current and Emeritus Members and Observers of the OSI Board

Eric S. Raymond - Founder & President Emeritus

Matt Asay
Brian Behlendorf
Deborah Bryant (*Current*)
Ken Coar
Danese Cooper
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*)
Raj Mathur
Martin Michlmayr
Mike Milinkovich (*Current*)
Ian Murdock
Russell Nelson
Nnenna Nwakanma
Andrew Oliver
Bruce Perens

Simon Phipps (*Current, President*)
Dr. Ernest Prabhakar
Mark Radcliffe (*General Counsel*)
Allison Randal (*Current*)
Larry Rosen
Tim Sailer
Chip Salzenberg
Alolita Sharma
Bruno Souza (*Current*)
Michael Tiemann
Guido van Rossum
Luis Villa (*Current*)
Dr. Tony Wasserman (*Current*)
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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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: 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.

Staggering dues 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.

Annual Corporate Revenues	Annual Dues
Greater than \$250 million...	\$20,000
Greater than \$100 million but less than or equal to \$250 million	\$15,000
Greater than \$50 million but less than or equal to \$100 million	\$10,000
Greater than \$10 million but less than or equal to \$50 million	\$7,500
Less than or equal to \$10 million	\$5,000
Less than \$1 million and not more than ten employees or contractors on staff	\$1,000

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