Management and Evaluation Of Open Source Projects
Who Do I Call?
Understanding the IT Ecosystem

Speakers:

Tim Bertrand
Advisor, Acquia (Drupal Association)

Greg DeKoenigsberg
Senior Community Architect, Red Hat
Leveraging Open Source Communities in the IT Ecosystem

Tim Bertrand
Key Elements to Consider

- **Project velocity**
  - Rate of code change

- **Community character**
  - Size, velocity, maturity
  - Goals – yours vs. the community’s
  - Interaction dynamics

- **Commercial ecosystem**
  - Breadth / depth, relationship to community
Project Velocity

- High speed can be difficult
  - Can outpace your ability to keep up
  - Tendency to deprecate stuff you rely on

- But high speed is really good to have
  - Your technical needs will be met faster
  - Evidence of project vitality over long-term

- On balance, faster is generally better
Drupal Has Very High Velocity
Community Character Matters

- Governance, leadership
  - Who & what controls the project?
  - Who does project “marketing”? Is there an association or leadership council?

- Code source
  - Community-built, or commercially-built

- These affect long-term viability
Community Example

drupal.org
This is Drupal
This is Drupal
This is Drupal
This is Drupal
This is Drupal

The Drupal Association is an organisation dedicated to helping the open-source Drupal CMS project flourish. We help the Drupal community with funding, infrastructure, events, promotion and distribution.

---

News and Events

**Building the Drupal.org re-design community infrastructure: Administrators wanted**
Oct 30
One of the biggest challenges in working in a large community like the Drupal community is removing bottlenecks. All too often the community can seem to come to a grinding halt on just one issue that can only be managed by one person. On Monday Dries gave a presentation at MIT and talked about how some of the Drupal community’s biggest problems have helped create some of our best solutions. In particular, he cited how our drupal.org server melt down in 2005 lead to the creation of the Drupal association to proactively manage and plan for our infrastructure growth.

**More computer power**
Sep 11
The Drupal Association has used some of the money that it acquired thanks to the Drupal community and its sponsors to buy more computing power for the infrastructure that drives our web-based systems.
Drupal Association Marketing

Change the web. Change the world.

What can you make with Drupal? Beautiful, personal blogs or mighty, multi-featured, multi-user corporate sites. Our open source publishing software is limited only by your imagination and eagerness to learn.

Why Choose Drupal?

What you can do with Drupal is limitless. If you start with a personal blog but need a multifunctional company site then you can grow with Drupal, adding features, personalising content, and creating your own unique space on the web – all in a secure environment with a community of thousands on hand to help!

If you already like what you see then why not start creating your site now:

Get Started!

Things we made with Drupal

MTV UK designed their site using Drupal

Who Else Uses Drupal? Magazines: Fast Company, Popular Science. Newspapers: The Onion, Morris Digital, Seattle Times and many, many more...

Develop with Drupal

Drupal is extensible, powerful, scalable, and flexible. Grow your own, tweak or break the mold, or hire a helping hand.

Developers

API info
Download earlier versions
Job Board
Submit issue queries

Modules and Themes
Find modules
Create modules
Rate/review modules
Find Drupal themes

Popular searches

Panels
WYSIWYG
Image upload
CCK
Visit the website whitehouse.gov
Questions to Evaluate Maturity

- Age of project; older usually = better
- Number of active code contributors
- Number of downloads
- Any “fully committed” resources?
- Download / code lines-committed trend
- Commercial ecosystem – strong projects typically have ecosystems generating tens/hundreds of millions (billions) in “pull through” revenue
Interaction Dynamics Differ

- **Electronic**
  - Be sure the project’s dynamics match how your developers work
    - IRC vs. email vs. forums vs. wiki vs. project site
- **How do (or can) you join the project community?**
  - **Training**
    - By experience, or are there books / videos / podcasts / local groups?
  - Geographic center of gravity, or not?
200+ Local Drupal Groups
Commercial Ecosystem

- Is there one? How broad / mature?
- Is community supportive?
- Consultants only, or “commercial support”?
- Commercial add-ons, or open-source-only?
## Why Care about Commercial Support?

<table>
<thead>
<tr>
<th>Decision Factor</th>
<th>Community</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stage/Lifecycle</td>
<td>Exceptional for early stage initiatives</td>
<td>Mission critical initiatives require deeper assurance, well-financed bench-depth</td>
</tr>
<tr>
<td>Time/Urgency</td>
<td>No guarantee</td>
<td>Guaranteed SLA’s</td>
</tr>
<tr>
<td>Cost</td>
<td>Free</td>
<td>Not free</td>
</tr>
<tr>
<td>Reliability</td>
<td>Likely reliable, but not guaranteed</td>
<td>Paid to be reliable</td>
</tr>
<tr>
<td>Contextual support</td>
<td>Little context between support issues</td>
<td>Context preserved across support interactions</td>
</tr>
</tbody>
</table>
Recap

- Consider three factors when seeking to leverage FOSS (Free & Open Source Software)
  - Project velocity
  - Community character
  - Commercial ecosystem
- Mission-critical applications require all three
- Drupal rocks them all!
Next Steps…

- Come visit the Drupal booth to see over 50 examples of National Government sites deployed on Drupal
Companies and Communities...

...and how they fit together.
In the beginning, there was Red Hat Linux.
In the beginning, there was **Red Hat Linux**.

We had no idea what we were doing.
Here's what we've learned.
Here's what we've learned.

In the world of open source software,

companies and communities

play complementary parts,

and each makes the other better.
Community

Innovation

Company

Stability
Community

Innovation

Rapid Development

Company

Stability

Change Management
Community
- Innovation
- Rapid Development
- Embracing Risk

Company
- Stability
- Change Management
- Mitigating Risk
<table>
<thead>
<tr>
<th>Community</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovation</td>
<td>Stability</td>
</tr>
<tr>
<td>Rapid Development</td>
<td>Change Management</td>
</tr>
<tr>
<td>Embracing Risk</td>
<td>Mitigating Risk</td>
</tr>
<tr>
<td>Money is scarce</td>
<td>Time is scarce</td>
</tr>
</tbody>
</table>
Community
- Innovation
- Rapid Development
- Embracing Risk
- Money is scarce
- Highly collaborative

Company
- Stability
- Change Management
- Mitigating Risk
- Time is scarce
- Modestly collaborative
Community

Innovation
Rapid Development
Embracing Risk
Money is scarce
Highly collaborative
Exciting!

Company

Stability
Change Management
Mitigating Risk
Time is scarce
Modestly collaborative
Not so much.
<p>| Fedora Project | Red Hat Enterprise Linux |</p>
<table>
<thead>
<tr>
<th>Fedora Project</th>
<th>Red Hat Enterprise Linux</th>
</tr>
</thead>
<tbody>
<tr>
<td>Released every 6 months</td>
<td>Released when it's ready</td>
</tr>
<tr>
<td><strong>Fedora Project</strong></td>
<td><strong>Red Hat Enterprise Linux</strong></td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Released every 6 months</td>
<td>Released when it's ready</td>
</tr>
<tr>
<td>Limited lifecycle (13 months)</td>
<td>Extended lifecycle (7 years plus)</td>
</tr>
<tr>
<td>Fedora Project</td>
<td>Red Hat Enterprise Linux</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Released every 6 months</td>
<td>Released when it's ready</td>
</tr>
<tr>
<td>Limited lifecycle</td>
<td>Extended lifecycle</td>
</tr>
<tr>
<td>(13 months)</td>
<td>(7 years plus)</td>
</tr>
<tr>
<td>Aggressive patch policy</td>
<td>Conservative patch policy</td>
</tr>
<tr>
<td><strong>Fedora Project</strong></td>
<td><strong>Red Hat Enterprise Linux</strong></td>
</tr>
<tr>
<td>--------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Released every 6 months</td>
<td>Released when it's ready</td>
</tr>
<tr>
<td>Limited lifecycle (13 months)</td>
<td>Extended lifecycle (7 years plus)</td>
</tr>
<tr>
<td>Aggressive patch policy</td>
<td>Conservative patch policy</td>
</tr>
<tr>
<td>Never certified</td>
<td>Extensively certified</td>
</tr>
<tr>
<td><strong>Fedora Project</strong></td>
<td><strong>Red Hat Enterprise Linux</strong></td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td>Released every 6 months</td>
<td>Released when it's ready</td>
</tr>
<tr>
<td>Limited lifecycle</td>
<td>Extended lifecycle</td>
</tr>
<tr>
<td>(13 months)</td>
<td>(7 years plus)</td>
</tr>
<tr>
<td>Aggressive patch policy</td>
<td>Conservative patch policy</td>
</tr>
<tr>
<td>Never certified</td>
<td>Extensively certified</td>
</tr>
<tr>
<td>Community driven</td>
<td>Customer driven</td>
</tr>
<tr>
<td><strong>Fedora Project</strong></td>
<td><strong>Red Hat Enterprise Linux</strong></td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Released every 6 months</td>
<td>Released when it's ready</td>
</tr>
<tr>
<td>Limited lifecycle (13 months)</td>
<td>Extended lifecycle (7 years plus)</td>
</tr>
<tr>
<td>Aggressive patch policy</td>
<td>Conservative patch policy</td>
</tr>
<tr>
<td>Never certified</td>
<td>Extensively certified</td>
</tr>
<tr>
<td>Community driven</td>
<td>Customer driven</td>
</tr>
<tr>
<td>Zero cost</td>
<td>A wee bit greater than zero cost</td>
</tr>
<tr>
<td><strong>Fedora Project</strong></td>
<td><strong>Red Hat Enterprise Linux</strong></td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td>Released every 6 months</td>
<td>Released when it's ready</td>
</tr>
<tr>
<td>Limited lifecycle (13 months)</td>
<td>Extended lifecycle (7 years plus)</td>
</tr>
<tr>
<td>Aggressive patch policy</td>
<td>Conservative patch policy</td>
</tr>
<tr>
<td>Never certified</td>
<td>Extensively certified</td>
</tr>
<tr>
<td>Community driven</td>
<td>Customer driven</td>
</tr>
<tr>
<td>Zero cost</td>
<td>A wee bit greater than zero cost</td>
</tr>
<tr>
<td>Building the future</td>
<td>Protecting the present</td>
</tr>
</tbody>
</table>
thanks y'all

gdk@redhat.com
Sustainability of Open Source

Speaker:

Keith Bergelt
CEO, Open Invention Network
Open Invention Network: Patents, Probes & Strength in Unity
• Agenda

– Setting the Context
  • Capital & IP Speculation
  • Secondary Market, IP Trolls & OSS Antagonists
  • Rise of Defensive Patent Pools & Collaboration Across and Among
  • New Models of Innovation and Invention in Open Source

– Trends in Intellectual Asset Management In Linux and Beyond
  • Patenting
  • Defensive Publications

– OIN Role in Advancing These Trends
  • Linux Defenders
    – Peer to Patent
    – Post Issue Peer to Patent
    – Defensive Publications
Realities –

• Open Source is the Single Most Important Invention and Innovation Modality to Come into Being in the Post-Industrial Era
  – Cost Effective
  – Collaborative – Collective Intelligence
  – Iterative
  – Adaptive/Nimble
  – Innovative
  – Global

• Technology Companies have historically utilized codified (patents, TMs, copyrights) and non-codified (know-how, knowledge) intellectual capital to drive innovation and commercial growth

• Patent Offices have granted software patents
Realities –

- Linux & Open Source Antagonists whose business models are antithetical to true innovation and who are threatened by Linux and OS exist
  - Case in Point – TomTom litigation (FAT)
    - MS “Totem “ Building Strategy (Q109) – Hollow
    - MS Attempting to Create a Rebuttable Presumption of Patent Relevance **BUT** No “Arms Length” Licensing
    - Active Deterrent in place – OIN, SFLC, LF, FSFE
    - Community Unified and Mature
    - OS and Linux is not so much about technology as it is a social and cultural shift - irreversible
Realities –

- Patents may either enable or retard Open Source and Linux...depending upon the motivations of the patent owners i.e. Patent Trolls, Antagonists

- Capital is “Chasing Spread” and is Fueling the Emergence of an Increasing Number of Patent Speculator/Troll business models

- Defensive Patent Pools (OIN, AST, etc.) are Forming, at least in part, to address the Patent Troll problem

- Open AND Closed not Open OR Closed
Patent Pools are Forming to Counteract the Rise of Patent Speculators/Trolls

- **OIN** - Linux and Open Source Focused Equity Member Model (no profit motive)
- **AST** - Broad based Trust Member Model (no profit motive)
- **RPX** - Broad based Subscriber Model (profit-driven)

**Next Step** - “Patent Treaties” that Leverage Capital Across and Among Defensive Patent Pools to Heightened Effect
Open Source = Engagement, Efficient Use of Capital & Requisite Variety to Yield “New New”

Silo’d Technology Development = Exclusion, Inefficient Use of Capital & Lack of Requisite Variety
Trends in Intellectual Asset Management In Open Source and Beyond

- Patenting
- Defensive Publications
- Reform – Legislative, Regulatory, Judicial & Market-led e.g.

*Linux Defenders*
- Peer to Patent
- Post Issue Peer to Patent
- Defensive Publications
Convergence of thought occurring that is ushering in alternative approaches to IP rights management
Current Positioning in the Ecosystem

OIN is...

... a collaborative enterprise
    that enables innovation in open source
    and an increasingly vibrant
    ecosystem around Linux
    by acquiring and licensing patents,
    influencing behaviors and policy and
    defending the integrity
    of the ecosystem
OIN Exists to Ensure that Linux and the Broader Open Source Ecosystem that Supports It Continues to Grow and Expand
Summary of Operational Activities

- **Open Invention Network** – Industrial Firms Committed to Open Source and Linux and Engaged in Purchasing/Licensing of Patents & Parallel External Actions to Create a Patent “No Fly Zone” around Linux
  - Patent Acquisitions (past and current inventions)
  - Directed Invention (Universities, Individual Inventors, Acquired Patent-Centric SMEs)
    - Patents
    - Defensive Publications
    - Patents w/Defensive Publications
  - Royalty Free Licenses
  - One on One Navigational Guidance to Those Under Threat
  - Linux Defenders
    - OS “Peer to Patent”
    - OS “Post-Issue Peer to Patent”
    - “Defensive Publications”
    - “LinuxDefenders911”
OIN and Partners Collaborate to Facilitate Market-Led Reform

**Linux Defenders Overview**

- **OS Peer to Patent** – Ensuring Prior Art Relevant to Current Patent Applications is Known so Poor Quality Applications can be Rejected

- **OS Post-Issue Peer to Patent** – Ensuring Prior Art Relevant to Previously Issued Patents is Identified and Poor Quality Patents Can be Invalidated

- Ensure that “Defensive Publications” are Produced and Available to Patent Examiners to Serve as Prior Art that Limits Future Marginal Quality Patenting in Linux and Ensures “Freedom of Action”
Linux Community Unified and Increasingly Aware…

- Linux Defenders is a community ‘crowdsourcing’ tool whose utility and value is enormously **enhanced through participation** – 1 + 1 + 1 = 5
- **Participation is increasing** every week
- Opportunity that is increasingly being viewed as a **Responsibility**
- Acts of Aggression drive more participation and **stiffen community resolve**

Ultimately, those Interested in Supporting Globally Engaged Innovation (i.e. Linux/OSS community of distros/vendors/customers, legislators, regulators, judiciary, competition authorities, etc.) Need to Act to Ensure that Open Source/Linux is Safeguarded and Patents **Enable** NOT Disable the Growth of the Ecosystem!
Conclusion...

• Linux Defenders is part of Global Market-Led Patent and IAM reform that has application in the new context of OSS Innovation across technologies

• OSS/Linux Community has a vehicle in defensive publications to codify what is known so that others do not later secure patents on these ideas

• The OSS/Linux Community must meet Legislative, Regulatory and Judicial Reform “half way” for true change to occur & ensure protection

• Those interested in safeguarding Open Source and Linux need to act to ensure that ONLY high quality patent applications issue, ALL poor quality patent applications are rejected, and ALL poor quality patents that have already been issued are invalidated.

• Participation is increasingly becoming an obligation!
Questions?

Tell us what you think:
Complete the survey