

Understanding the Open Source Initiative

Lessons from the first 20 years of Open Source

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Open Source
Initiative®

The **Open Source Initiative** (OSI) is a non-profit corporation, founded in 1998 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.

OSI is the **steward** of the **Open Source Definition** and the **community-recognized** body for reviewing and **approving open source licenses**.

Open source enables 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**, better **reliability**, greater **flexibility**, **lower cost**, and an **end to predatory vendor lock-in**.

The OSI Affiliate Program allows non-profit and not-for-profit organizations to become OSI members.

Affiliate membership is an ideal way for open source projects and the communities that support them to support the mission of the OSI and contribute to the continued awareness and adoption of open source software.

Affiliate Membership

A "who's who" of open source communities



Origins

Before Open Source

Open Source Is Free Software



Origins



“Free software is software that gives you the user the freedom to share, study and modify it. We call this free software because the user is free.”

<https://www.fsf.org/about/what-is-free-software>

Software Freedom Defines A Personal Ethical System

Use

Study

Improve

Share

Open Source Is 20 Years Old

“Open Source” is the proper name of a campaign to promote the pre-existing concept of Free Software to business, and to certify licenses to a rule set.

Christine Peterson ... suggested “Open Source” as a way to promote Free Software without the stigma of “free” in the English language.”

Bruce Perens¹, Co-Founder of the Open Source Initiative

1: <https://perens.com/2017/09/26/on-usage-of-the-phrase-open-source/>

Open Source lets software users and developers advance software freedom at work as well as in private

The First Decade

Open Source 1998-2008
Advocacy & Controversy

Upstart Advocacy

Open Source Licensing

Open Source Business Models

Decade One Timeline - *Advocacy & Controversy*

- 1998 Term coined as rebrand for software freedom; OSI formed
- 1999 Open Source Definition published: licenses standardised
- 2000 Most open source is a proprietary replacement
- 2001 “Linux is a cancer” - Microsoft¹
- 2002 Rush of new licenses
- 2003 SCO sues IBM over Linux²
- 2004 Last of Microsoft’s “Halloween Documents”
- 2005 Unix now open source (Sun Solaris)
- 2006 Open Standards Requirement (OSR) published
- 2007 Java now open source
- 2008 Most CIOs understand open source as a benefit

What made open source licensing succeed?

- Crystallisation of Consensus
- Multilateral vs Unilateral
- Creating Space for Constructive Dialogue

Open source licenses
are the
multilateral consensus
of the
permissions and norms
for a
community

*OSI crystallises and memorialises
that consensus*

OSI's Board approves
OSD-compliant licenses that
grant **all the rights** necessary for
all members of a project community
to **exercise the Four Freedoms**
described by Richard M Stallman
in **collaborative development** and
individual use of the software

Crystallisation of Consensus In Action

- The License Review Process triggered business adoption of open source
- Licenses for approval are posted to `license-review@opensource.org` according to the rules at <https://opensource.org/approval>
- Open public discussion leads to license improvement
- When the discussion reaches, consensus crystallised via Board validation & approval
- OSI is not a “King” - it is “Speaker of the House”

Open Source Doesn't Have Business Models

- ... companies do!
 - Your business model is your responsibility alone
 - Project norms create safety from business models
 - Open Source licenses isolate communities for their members' business models
- Hence OSI will not make exceptions when approving your license to accommodate your business model

First Decade Summary

Open Source won because:

- Reuse beats reimplementation
- Collaborative development beats reuse
- Both are chilled by permission-seeking
- Software freedom grants all rights in advance
- OSI approval of a license reduces uncertainty that rights are granted
- Developers don't validate against the OSD; they check for OSI approval and then proceed.

The Second Decade

Open Source 2008-2018
Adoption & Ascendancy

Broad Enterprise Adoption

License Enforcement

Software Patents

Decade Two - *Adoption & Ascendancy*

- 2008 Most open source is “hidden” infrastructure
- :
- 2010 Open source enabling web service business wave
- :
- 2013 Open source powering cloud/container revolution
- :
- 2015 “Microsoft ❤️ Linux”
- :
- 2017 Open source at the heart of most new software
- :
- 2018 Open {source, hardware, data} increasingly converge & dominate

License Enforcement



Compliance

- The license is only valid if you comply with its conditions
- License violators are pirates and patent violators
- But Open Source usually wins from compliance, not enforcement
- Reciprocity is not the only compliance requirement
- Attribution is also required for a valid license in some cases
- Attribution compliance will be a big deal next decade

Patents - Breaking The Safe Space

Patents break the safe space on which open source depends:

- Developers must seek permission before innovating
 - ... for royalties on inbound patents
 - ... for inadvertently licensing outbound patents
- Developers mistrust the motivations of others
- Notably, developers not paid to do otherwise avoid standards where patents may apply (RAND)

The Open Standards Requirement (OSR)

OSI hosted a public, consensus building activity on the relationship of Open Source and standards at the end of decade one.

The crystallization is called the **Open Standards Requirement**:

<https://opensource.org/osr>

Conclusions

- Software freedom remains the essential core of software projects that succeed.
- Open source has always been and remains a pragmatic approach to ensuring all rights needed by software freedom are granted to all.
- The future of open source is the future of software freedom. We should work together!
- And, of course! <https://opensource.org/join>

Please join (c)(3)s as well as (c)(6)s

- “Trade Associations” like Linux Foundation and OpenStack are the new normal and do great things
- But open source relies on the “community charities” like OSI, FSF, FSFE and Software Freedom Conservancy too
- So please remember to support and promote us as well!



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