Respecting Open Source Licenses!

OSCAd (& OSLiC)

The Open Source Compliance Advisor (and its mother)
(a) Free Tool(s) to Facilitate the Fulfillment of Open Source Licenses

Open Source CompLianCe in Deutsche Telekom   *Karsten Reincke*

Erleben, was verbindet.

ʀOSʟ!

Open Source thinks **the other way round:**
You ever have to know, what you have to do!

"PAYING" BY DOING

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- We all know: We can't buy the right to use open source software. The open source software thinks the other way round: you get the right to use, to modify and/or to redistribute the software by doing what is required by the open source licenses. Thus, the management of companies using open source software has to know: open source software follows the principle ‚paying' by doing.

rOSL!

Open Source thinks the other way round:
You ever have to know, what you have to do!

"Free Redistribution

The license shall not restrict any party from selling or giving away the software as a component of an aggregate software distribution containing programs from several different sources. The license shall not require a royalty or other fee for such sale."

§ 1 of the Open Source Definition *

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- This statement refers to the OSD the 'Open Source Definition' hosted and maintained by the Open Source Initiative. The first paragraph of the OSD forbids to request for a license fee. Hence, we can't by any open source software..

rOSL!

Open Source thinks the other way round:
You ever have to know, what you have to do!

1. Free Redistribution
2. Source Code
3. Derived Works
4. Integrity of The Author's Source Code
5. No Discrimination Against Persons or Groups
6. No Discrimination Against Fields of Endeavor
7. Distribution of License
8. License Must Not Be Specific to a Product
9. License Must Not Restrict Other Software
10. License Must Be Technology-Neutral

http://opensource.org/osd

License

OSI
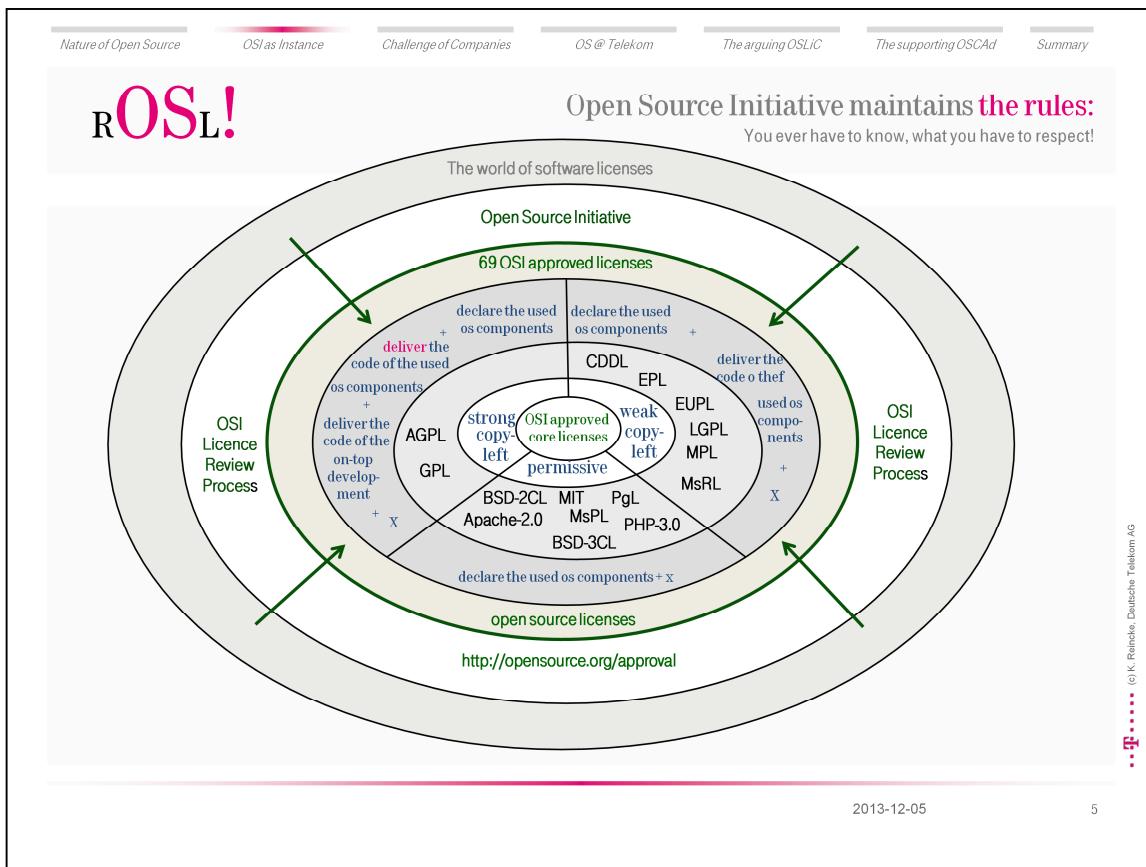
OS-Licence

XYZ-Licence

OS-Software

XYZ-Software

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2013-12-05   4
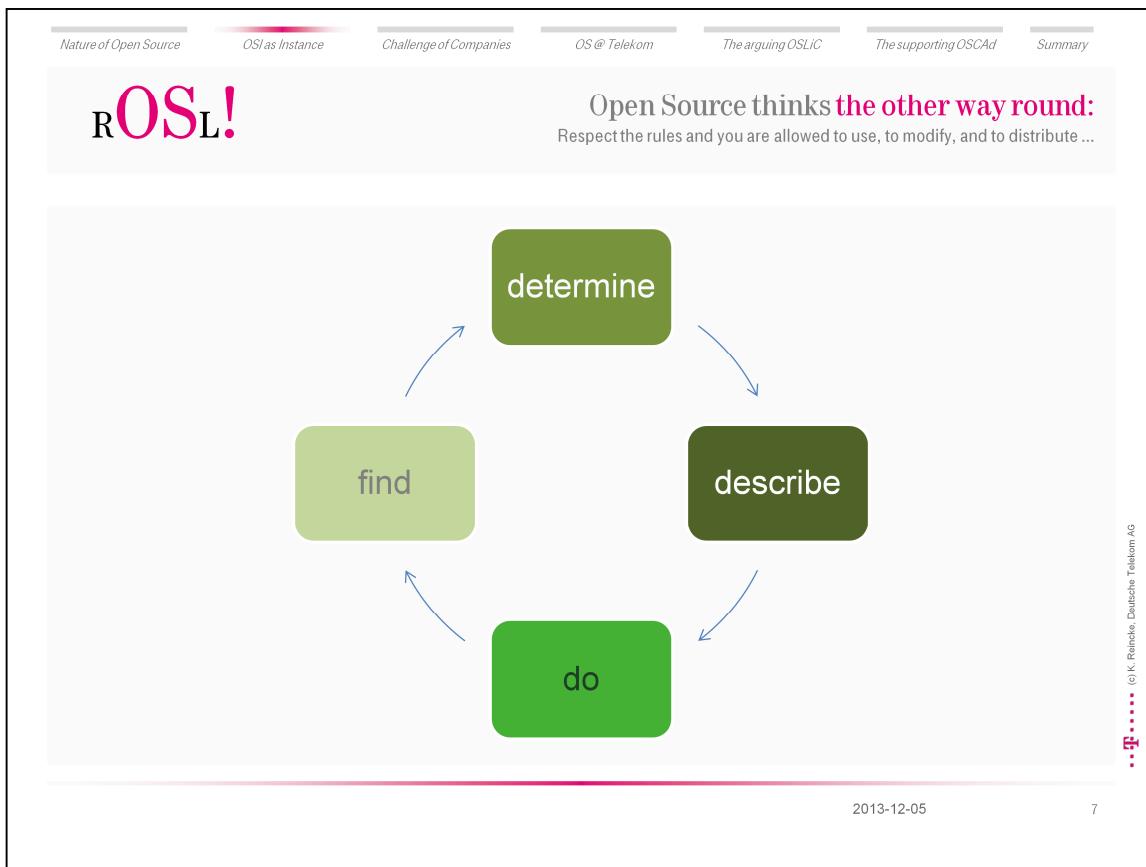
- The idea of the Open Source Definition is to separate Open Source Licenses from all the other software licenses not fulfilling these conditions.

rOSL!

Open Source Initiative maintains the rules:
You ever have to know, what you have to respect!

The world of software licenses

Open Source Initiative

69 OSI approved licenses

declare the used os components | declare the used os components

deliver the code of the used os components

deliver the code o thef

CDDL
EPL
EUPL

OSI Licence Review Process

deliver the code of the on-top develop- ment

AGPL

GPL

strong copy- left

OSI approved core licenses

weak copy- left

LGPL
MPL
MsRL

used os compo- nents

OSI Licence Review Process

permissive

BSD-2CL   MIT   PgL
Apache-2.0   MsPL   PHP-3.0
BSD-3CL

+ X

declare the used os components + x

open source licenses

http://opensource.org/approval

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- Organizationally, this separation is done by the OSI license review process. But again, inside of the set of OSI approved licenses, we can cluster these licenses by some of their features. One of the most known method to group the open source licenses internally is a taxonomy based on the categories 'permissive licenses', 'weak copy left licenses', and 'strong copy left licenses'.

ʀOSʟ!

Open Source Initiative maintains the rules:
You ever have to know, what you have to respect!

69

(with respect to
2012-05-11) OSI
certified

Open Source
Licenses

> 5

'use', 'modify', 'distribute',
'modify & distribute',
'embed' as

Open Source Use
Cases

> 345

more or less similar
lists of required
actions as

Fulfilling Task
Lists

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* http://www.opensource.org/licenses/alphabetical   2013-12-05   6

- But then there exists specific challenge: There are so many open source licenses (69) which require different fulfilling activities. And these fulfilling working steps must consider the different contexts (>5): do I only use the software for myself. Or do I hand over it to any other person? And have I modified it? Hence we get more than 345 possible fulfilling task lists.

ʀOSʟ!

Open Source thinks the other way round:
Respect the rules and you are allowed to use, to modify, and to distribute ...

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- So, a reliable open source license management process is determined by other aspects than the traditional license management :

  - find all used / received open source software

  - determine the usage context

  - describe the necessary actions which must be executed for fulfilling the license in this context

  - do what has to be done for acting according the open source license

$_R OS_L!$

Open Source thinks **the other way round:**
Respect the rules and you are already allowed to use, to modify, and to distribute the results!

WHO SHALL DO THAT?
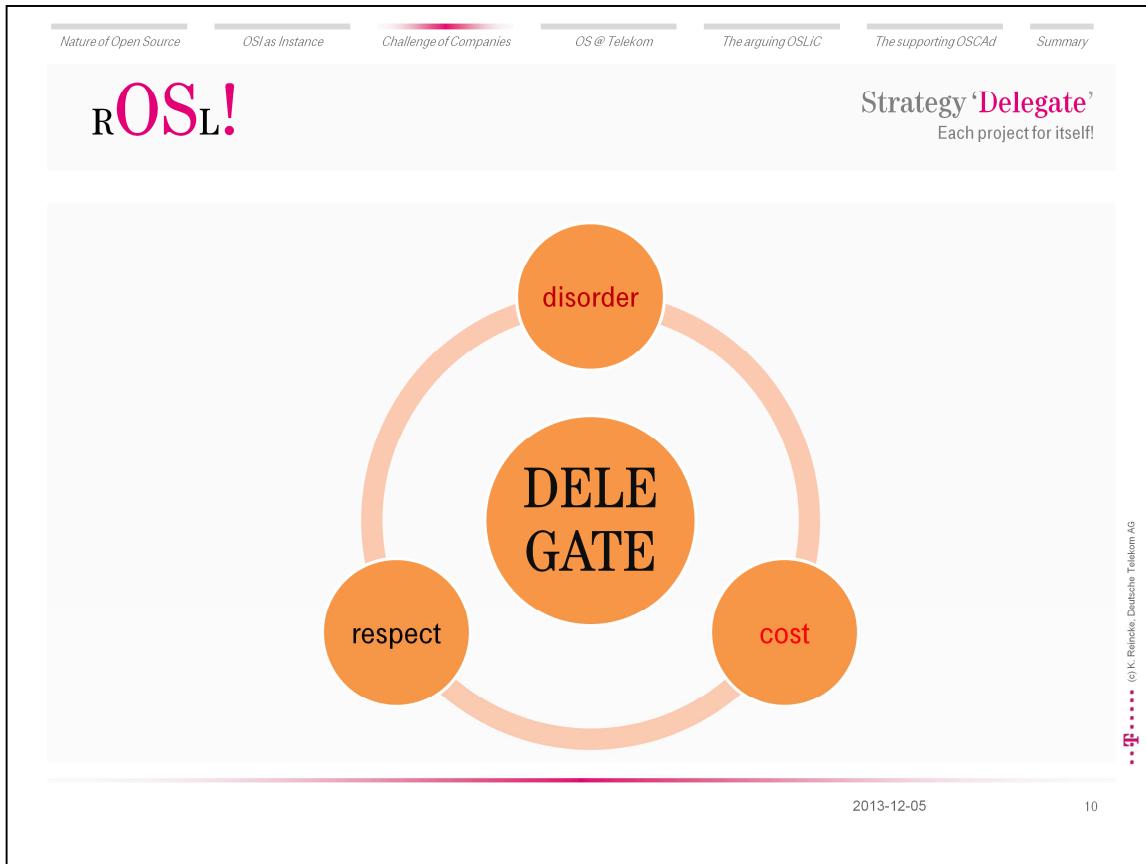
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- So, the main question is: who shall execute this job of ensuring to act according the open source licenses?
- For large companies this concerns its charges: the larger the company, the more used open source software, the more work, the more cost
- There exist different strategies to solve this challenge:

- The first strategy is to hope that anyone will do the job, even if nobody explicitly requires that this job must be done.
- Of course, it is a bad strategy – namely for companies who love to act compliantly.

- The second strategy is to delegate the job to each (software) project of a company.
- It's a better strategy – but still very expensive: each project must get / train its own license expert.
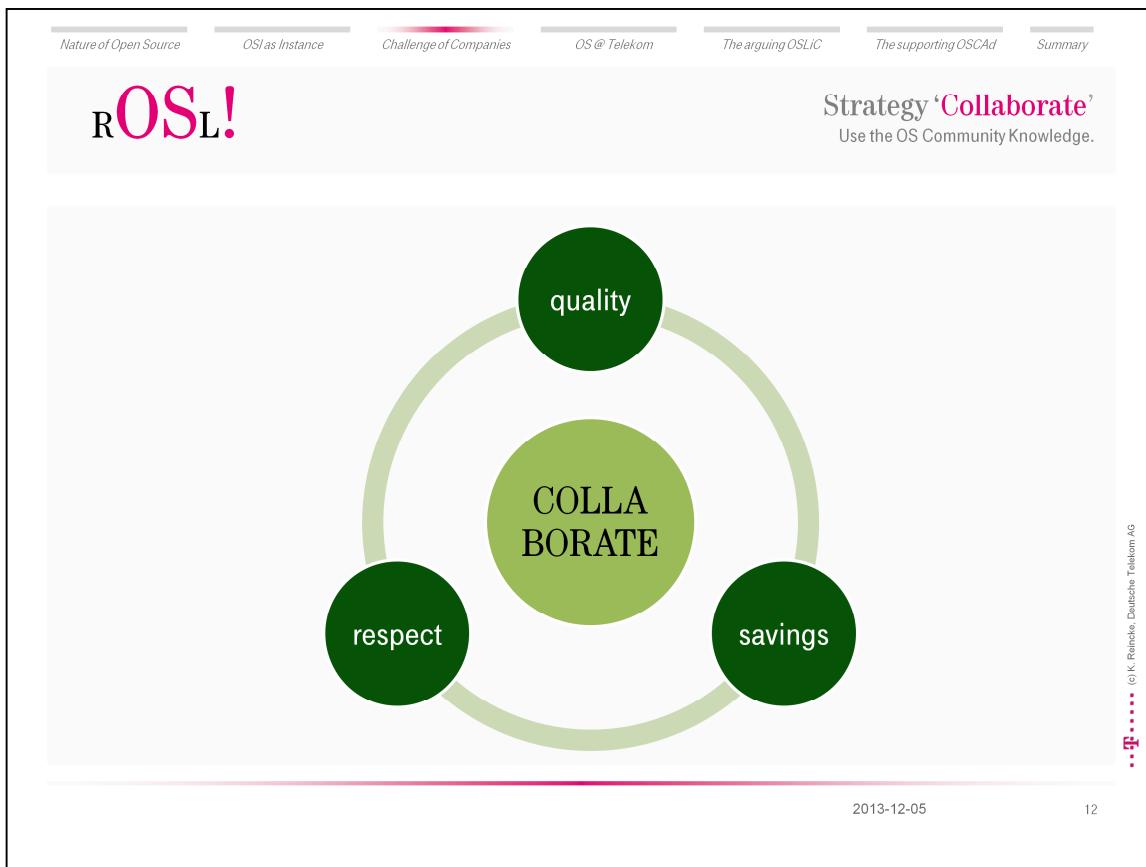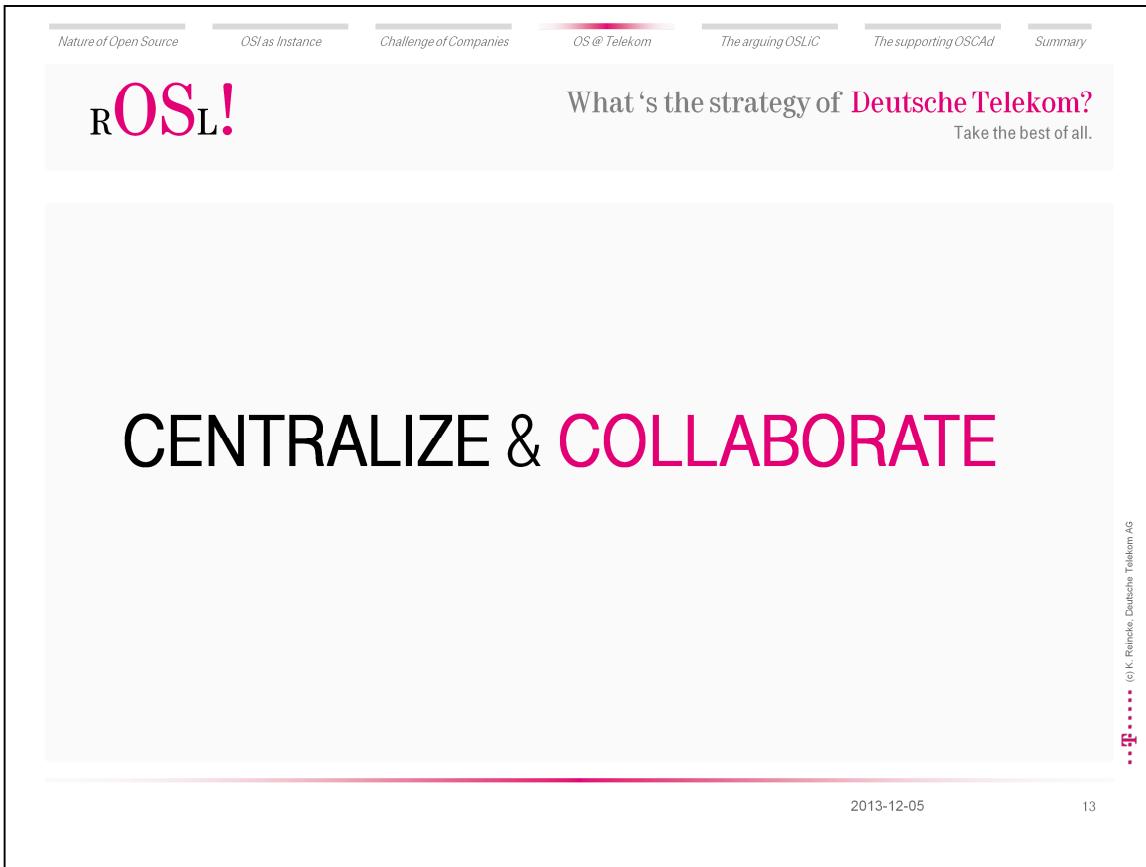
A good strategy is to form an internal central team of license experts which serve all request of all projects.

ʀOSʟ!

Strategy 'Collaborate'
Use the OS Community Knowledge.

2013-12-05   12

- The best strategy is to cooperate with the open source communities: the power is in the swarm
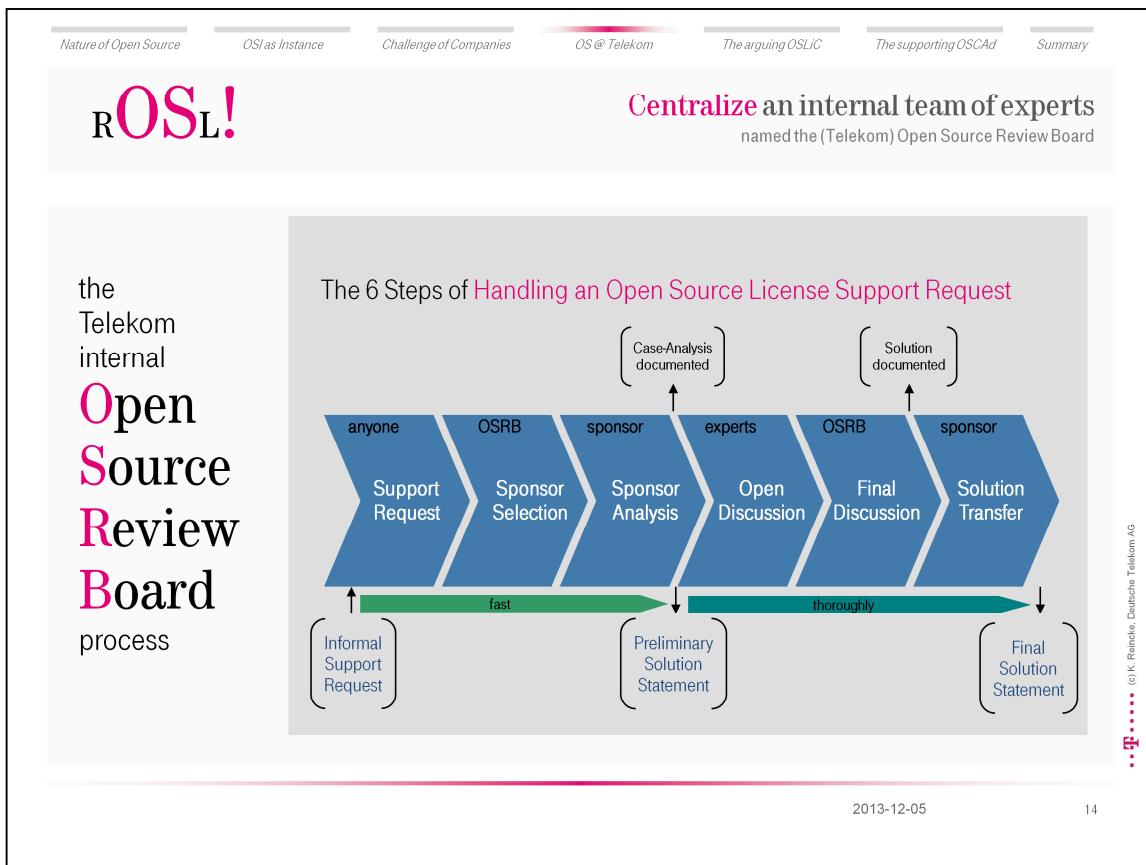
rOSL!

What 's the strategy of Deutsche Telekom?
Take the best of all.

CENTRALIZE & COLLABORATE

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2013-12-05   13

- The strategy of Deutsche Telekom AG?
- No doubt, we want to act according the open source licenses – even if we are a very large company.
- So we use a mixture of strategy no 3 (centralization) and no 4 (collaboration)

ʀOSʟ!

Centralize an internal team of experts
named the (Telekom) Open Source Review Board

the Telekom internal

Open Source Review Board

process

The 6 Steps of Handling an Open Source License Support Request

Case-Analysis documented

Solution documented

anyone	OSRB	sponsor	experts	OSRB	sponsor
Support Request	Sponsor Selection	Sponsor Analysis	Open Discussion	Final Discussion	Solution Transfer

fast | thoroughly

Informal Support Request

Preliminary Solution Statement

Final Solution Statement

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- Firstly we established indeed a team of experts, internally known as the Telekom Open Source Review Board, which acts according to this process: any one in the company can ask any one on the board a question. The board determines a sponsor for the request which firstly and very quickly analyzes and describes the case and gives a first preliminary solution statement. Then this statement is discussed and finally closed by the OSRB as whole.

rOSL!

Centralize and know that pareto will strike back!
The same work must be repeated to often.
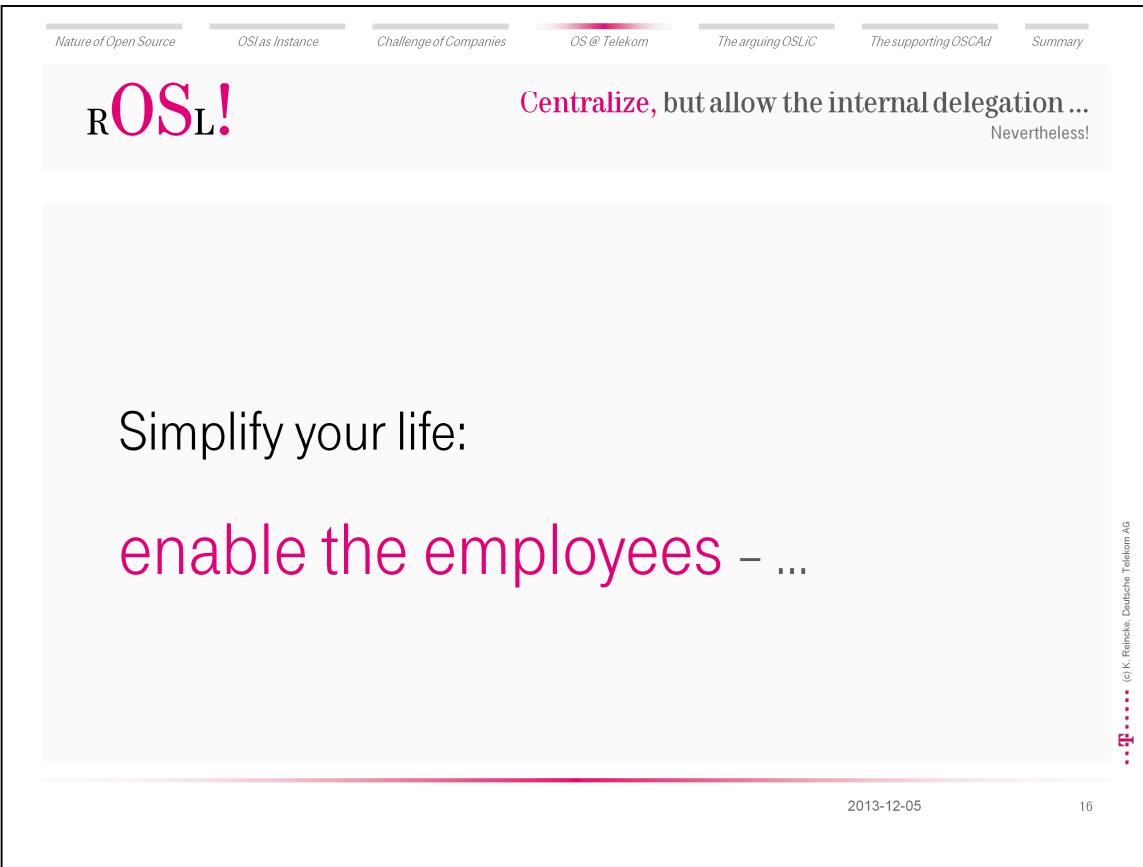
80 % of the requests are manageable by

20 % standard answers!

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- But one has to know, that the simple cases repeat again and again and hence must be handled again and again

rOSL!

Centralize, but allow the internal delegation ...

Nevertheless!

Simplify your life:

enable the employees – ...

2013-12-05   16

- So: At latest, it is nevertheless better to enable the employees themselves to answer at least the simple questions

ʀOSʟ!

Centralize, but allow the internal delegation …

if it's supported by a simple tool!

… but without being disruptive, without losing quality, and without generating extra cost:

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- … but without being disruptive, losing quality, or generating extra cost:

ʀOSʟ!
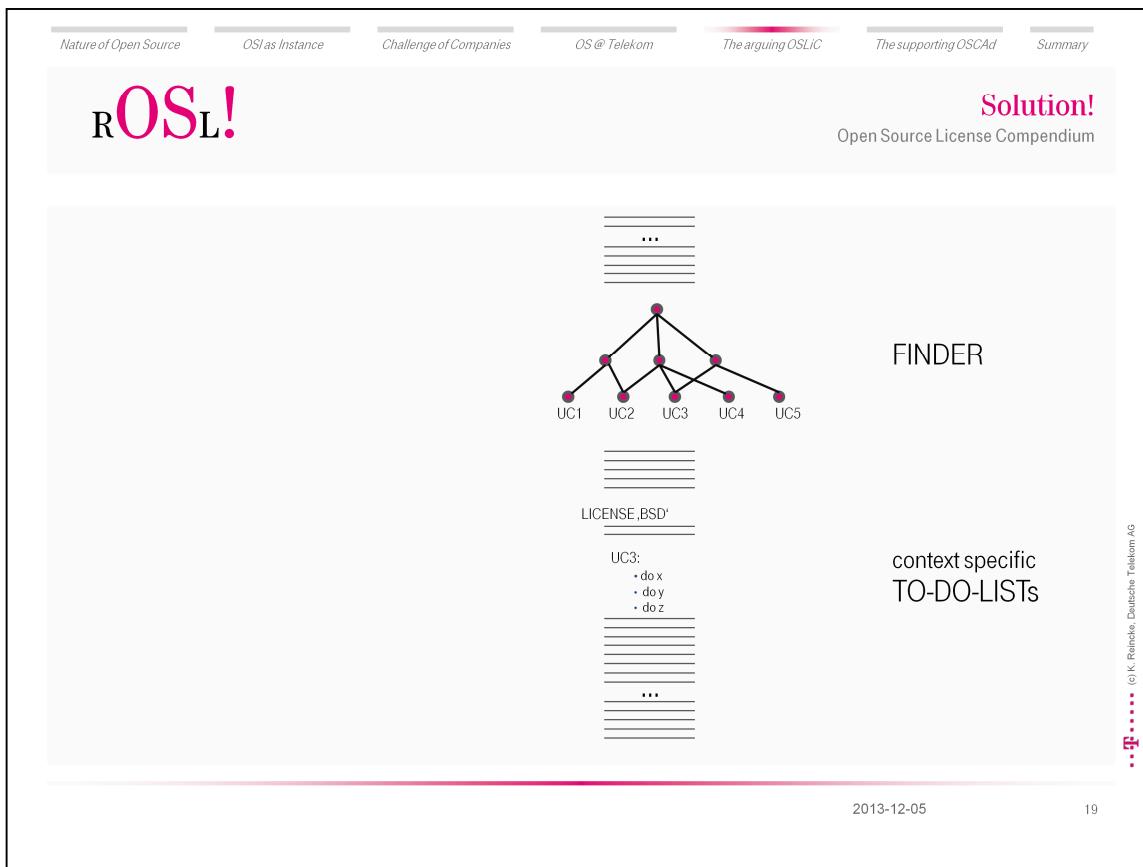
Solution?
Open Source License Compendium

The only thing we need is an easily to use Open Source License Compendium

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▪ The solution would be an Open Source License Compendium ...

ʀOSʟ!

Solution!
Open Source License Compendium

FINDER

UC1   UC2   UC3   UC4   UC5

LICENSE ‚BSD‘

UC3:
· do x
· do y
· do z

context specific
TO-DO-LISTs

2013-12-05   19

- Such a compendium will only be usable by developers if
  - a) they got a simply organized finder leading to the relevant use case
  - b) for each license and each use case the compendium offers a to-do-list by which the users can be sure to act according to the open source license.

ʀOSʟ!

Solution?
Open Source License Compendium

Unfortunately such an Open Source License Compendium did not exist.

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2013-12-05   20

- **Unfortunately** such an Open Source License Compendium did not exist. But fortunately - as often done in the community - anyone takes the task ...

ʀOSʟ!

Enable the internal delegation
... of handling the standard cases ...

Telekom is writing an

Open **S**ource **Li**cense **C**ompendium

Mission: Support our developers to **use Open Source Software compliantly** – as easy as possible

Motto: **Offer** one reliable way for each **license and each use case** in a simple and easy to find manner

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- The first idea of DTAG to solve this issue is to write an Open Source License Compendium following

  - the mission: Support our developers to use Open Source Software compliantly – as easy as possible

  - the motto: Offer only one reliable way for each license and each use case in a simple and easy to find manner

rOSL!

But enable also the **external collaboration!**
The swarm always knows more than a small group of experts:

Telekom is giving it free: The

Open **S**ource **Li**cense **C**ompendium

OS
LiC

- is commonly developable because of its LaTeX/BibTex nature
- is publicly hosted as a GitHub project
  - Oslic Projectpage (on GitHub): https://github.com/dtag-dbu/oslic
  - Oslic Homepage (on GitHub): http://dtag-dbu.github.com/oslic
- is licensed under CC BY-SA 3.0 DE*
  - http://dtag-dbu.github.com/oslic/en/oslic/license.html
- is open to be collaboratively developed together with the community

- The second idea of DTAG is to publish this compendium under the Creative Commons License Share Alike – a license which might be viewed as GPL for documents.

ʀOSʟ!

Be **invited,** be **welcome!**
We want to collaborate.

Telekom is giving it free: The
Open **S**ource **L**icense **C**ompendium
? What
– the hell –
does all that mean **concretely ?**
Demo or **Die!**

2013-12-05   23

Demo OSLiC.

- The feedback was a split vote:
    - Big encouragement, many thanks – especially of larger companies, and great admiration for having structured this topic successfully.
    - But also the message, that the OSLiC is daunting, that it won't be used by the intended readers, and that it should exist an interactive version.

ʀOSʟ!

Collaborating with the community **means** Listening

... to the feedback:

The interactive version of the OSLiC, the

Open **S**ource **C**ompliance **Ad**visor

- is commonly developable: a php web application
- is publicly hosted as a GitHub project
  - OSCAd Projectpage (on GitHub): https://github.com/dtag-dbu/oscad
  - Oslic Homepage (on GitHub): http://dtag-dbu.github.com/oscad
- is licensed under AGPL
  - http://dtag-dbu.github.com/oscad/en/oscad/license.html
- is open to be collaboratively developed together with the community

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- The third idea of DTAG is to republish this compendium as interactive web application, licensed under the AGPL, and also hosted on github, but with its own name: „the Open Source Compliance Advisor"..

ʀOSʟ!

So again: be **invited**, be **welcome!**
We want to collaborate.

Telekom is offers a second free tool: The
Open **S**ource **C**ompliance **Ad**visor

OSCAd, a sibling of the OSLiC
- demo or die!

2013-12-05   26

Demo of OSCAd.

ʀOSʟ!

Be **invited,** be **welcome!**
We want to collaborate.

State of the OSLiC & OSCAd

ready for using :

- use case based task lists for Apache, BSD, MIT, MS-PL, PgL, PHP EPL, EUPL, LGPL 2.1/3.0, MPL, GPL 2.0/3.0
- use case based finder
- description of the protecting power
- corresponding license taxonomy
- exposition of the patent clauses

still open:

- task lists for AGPL, CDDL, MS-RL, ...
- derivative work exposition
- license compatibility discussion
- OS and money chapter

The future of the OSLiC and the OSCAd is the already cooperating community:

- The Korean translation of the OSLiC can also be regarded as a prominent example,

- as the OSLiC maintenance, executed by Deutsche Telekom AG, a well known European telecommunication company or

- as the just started re-implementation of the OSCAd by the company Amadeus, the leading provider of IT solutions to your tourism and travel industry

ʀOSʟ!

Be **invited,** be **welcome!**
We want to collaborate.

opensource@telekom.de

http://dtag-dbu.github.com/oslic

http://dtag-dbu.github.com/oscad

http://opensource.telekom.net/oscad

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* valid until OSCAd will have found is durable host

2013-12-05

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- So, for summarizing the result:

- We, DTAG, need a supporting tool for acting according to the Open Source licenses - but without investing to much manpower.

- First, we set up the internal Telekom Open Source Review Board

- Second, we are going to reduce the work of our OSRB by writing a simple to use compendium covering to-do-lists for the standard case.

- Third – as a giving back to the community (and as process of a public review) – we've published this compendium in the spirit of open source

- Fourth, we listen to the feedback and published also a free interactive version of the OSLiC, the Open Source License Advisor OSCAD

ʀOSʟ!

Be **invited,** be **welcome!**
We want to collaborate.

Many thanks for your time and attention!

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http://www.oslic.org/

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- So, I am Karsten Reincke – many thanks for your attention.