

The Mutual Advantage of Open Source and Open Standards

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I know what you're thinking...

“I have a really bad habit of occasionally reading Rob Weir’s blog. For those of you who don’t know him, he’s one of IBM’s paid FUD masters that has a fanatical hatred of Open XML and all things Microsoft.

It’s a shame because he’s a really smart guy but uses his powers for the dark side of OSS. He’s almost like the Darth Vader of the OpenOffice world and goes to any lengths to instill fear in those who would even consider Microsoft standards or technologies.”

-- blog post by Microsoft's Viral Tarpara

For the record, I am not...

- Darth Vader
- Darth Maul
- Sauron
- Megatron
- Mordred
- Lord Voldemort
- General Zod
- Skelator
- Lex Luthor
- Count Baltar
- Vlad the Impaler
- General Grievous
- Sir Guy of Gisbourne
- Cristiano Ronaldo

Who is Rob Weir?

- IBM ODF Architect
- Co-Chair OASIS ODF TC
- Member of OASIS ODF Adoption TC
- Member of OASIS ODF Interoperability and Conformance TC
- Member of W3C RDFa WG
- Delegate to ISO/IEC SC34 via ANSI

But you can call me “The Dark Lord of ODF” if it makes you feel happy.

But who are you?

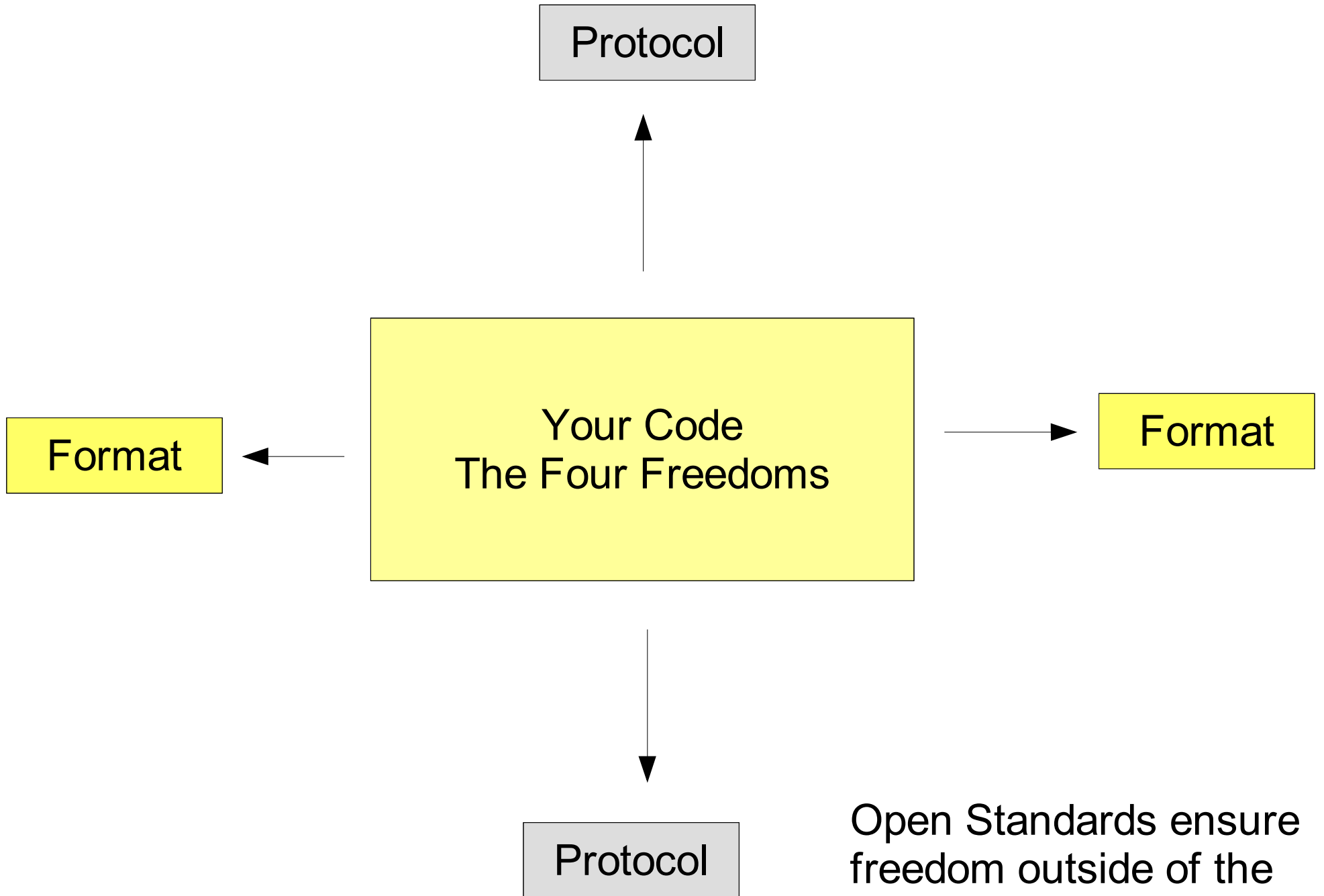


“Just read the code”

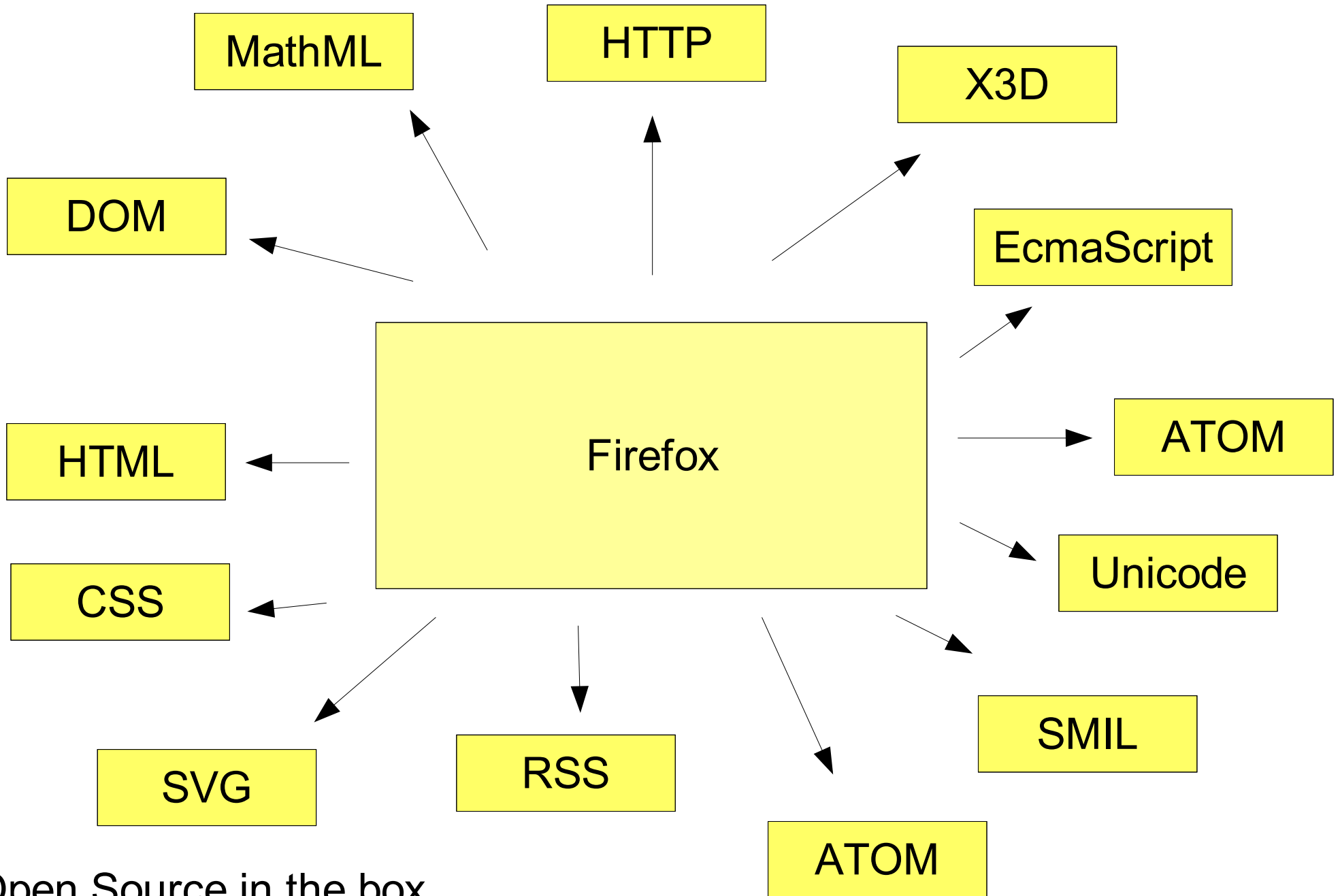
Free Software: 4 Freedoms

- 0 = Freedom to run software
- 1 = Freedom to study and change code
- 2 = Freedom to redistribute
- 3 = Freedom to redistribute modifications

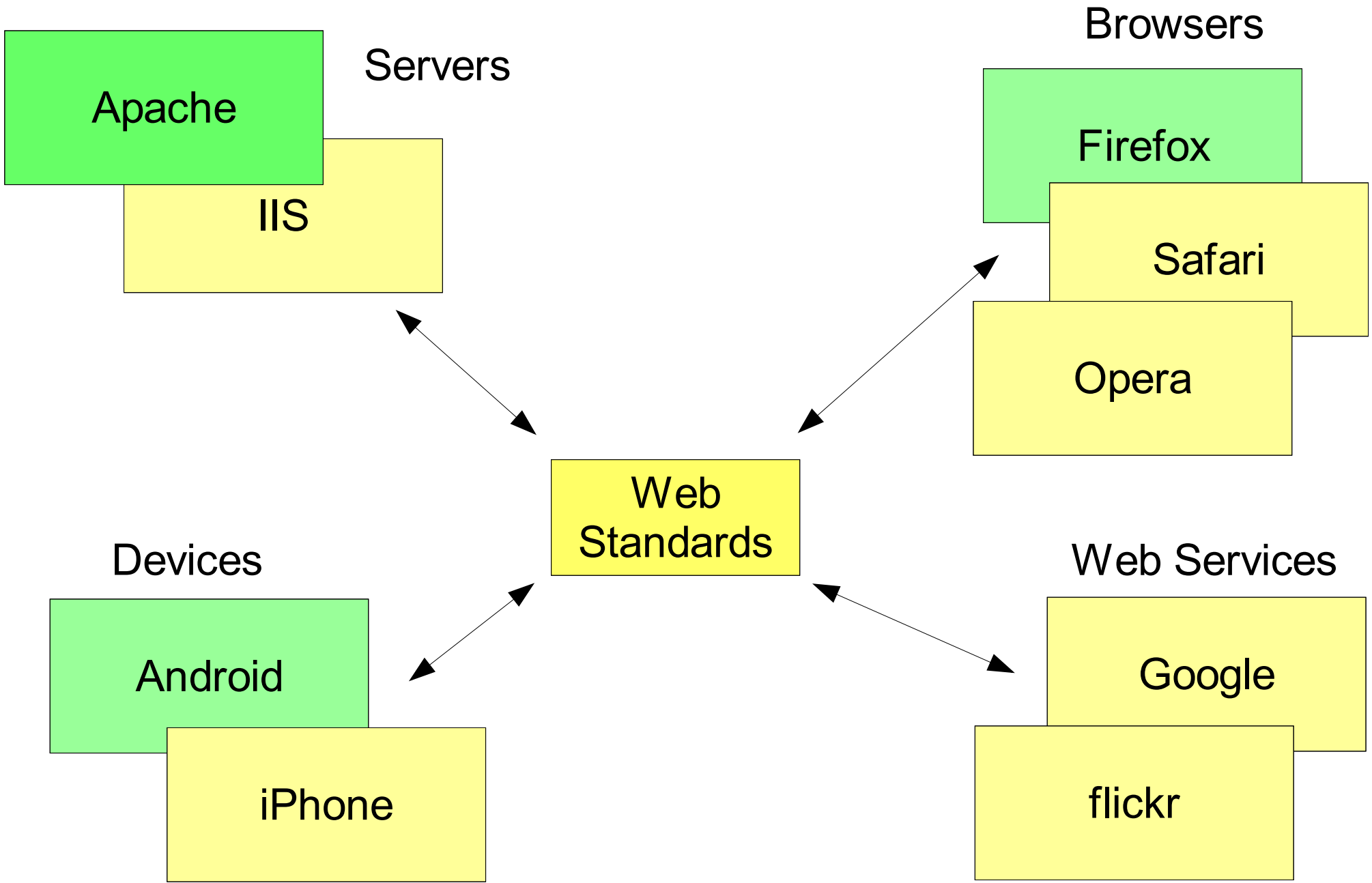
The view from circa 1986.
But is this enough in 2010?



Open Standards ensure freedom outside of the box of your code



Open Source in the box
Open Standards outside



With open standards, everyone can interoperate.

Which endured?



T. Berners-Lee, MIT/LCS
R. Fielding, UC Irvine
H. Frystyk, MIT/LCS
February 19, 1996

Hypertext Transfer Protocol -- HTTP/1.0

Status of this Memo

This document is an Internet-Draft. Internet-Drafts are working documents of the Internet Engineering Task Force (IETF), its areas, and its working groups. Note that other groups may also distribute working documents as Internet-Drafts.

All Code is Mortal

Code rots.

All code dies.

Yes, even yours.

So do not make your freedoms depend
exclusively on code rights.

Summary Point #1

- In a world where computing is centered on the client, in individual applications, then the code dominates.
- In a world where computing is centered on networks, social interaction, data exchange, syndication, web services, etc., then the formats and protocols that mediate the transactions dominate.



And this is where are are today

Standards: A Vocabulary Problem

- “Specification” = technical document
- “Standard” = Norm = approval by recognized body
- “De facto standard” not really a standard
- “Open standard” has many definitions

Warning: In some countries the word “standard” != “norm”

What is a Standard?

"A document, established by consensus and approved by a recognized body, that provides, for common and repeated use, rules, guidelines or characteristics for activities or their results, aimed at the achievement of the optimum degree of order in a given context.

NOTE Standards should be based on the consolidated results of science, technology and experience, and aimed at the promotion of optimum community benefits."

ISO/IEC Guide 2:2004 "Standardization and related activities -- General vocabulary"

Multiple Dimensions

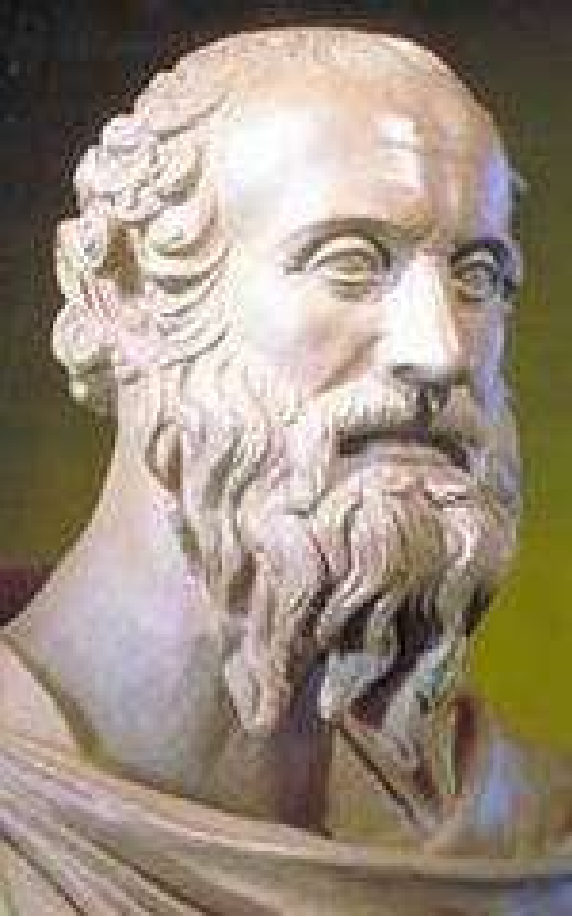


A standard is like a gun. It's a tool and can be used for good or bad. Your feelings towards a man with a gun depends not so much on the qualities of the gun, but on the qualities of the man and your orientation towards him.



“Man is an animal with two legs and no feathers”

- Plato



“Here is Plato's Man”

-Diogenes the Cynic



Ken Krechmer's Definition

	Creator	Implementer	User
Open Meeting	X		
Consensus	X	X	
Due Process	X	X	
Open IPR	X	X	
One World		X	X
One Change		X	X
Open Documents		X	X
Open Interface		X	X
Open Use		X	X
Ongoing Support			X

A functional definition

A Standard

=

Technical Stuff

+

Statement of Rights for users

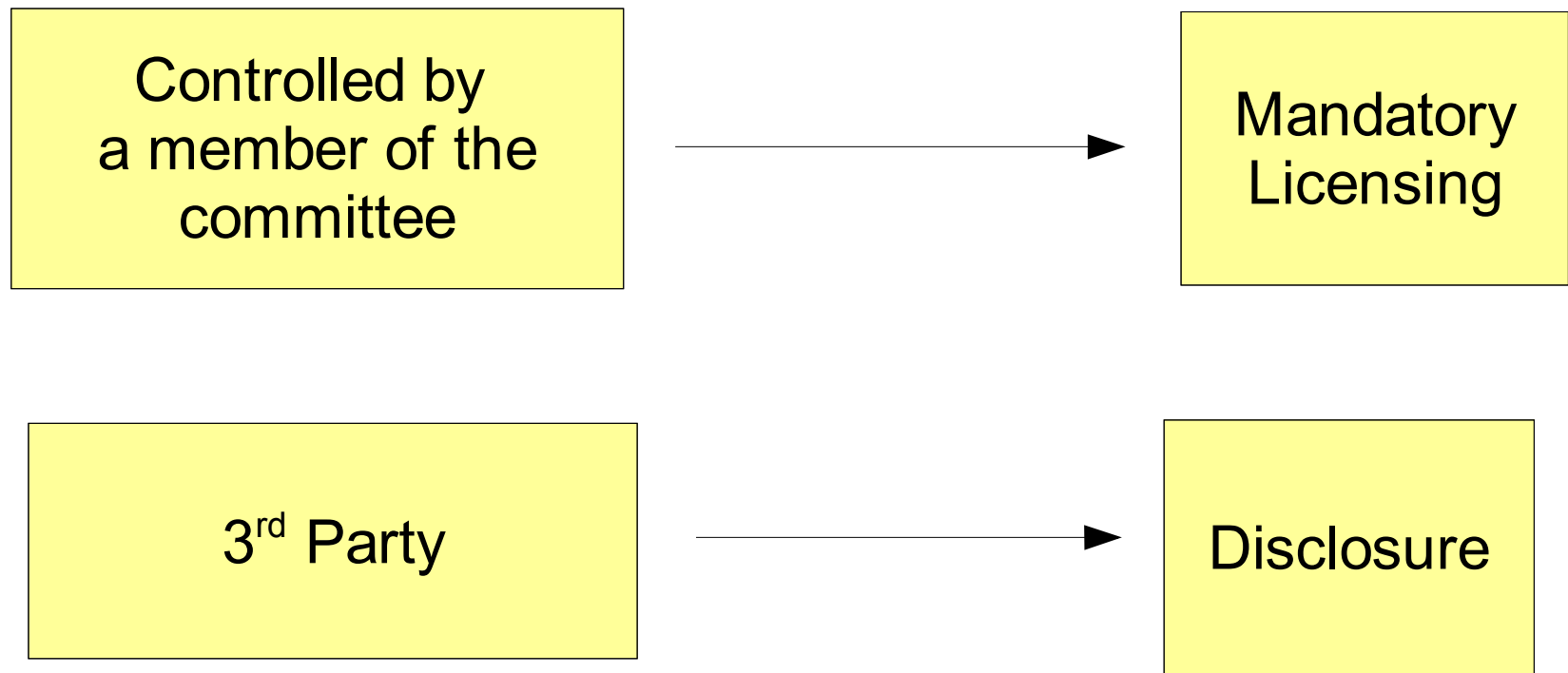
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Statement of Obligations for contributors

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Governance

Patents and Standards



Summary Point #2

Creating a bullet-proof definition of “open standard” is very difficult, especially when money is at stake.

It is not a job for idealistic philosophers, but for cynics.



“People of the same trade seldom meet together, even for merriment and diversion, but the conversation ends in a conspiracy against the public, or in some contrivance to raise prices.”

Adam Smith, *The Wealth of Nations* (1776).

ANSI (USA) Principles

- Transparency
- Openness
- Impartiality
- Effectiveness and Relevance
- Consensus
- Performance Based
- Coherence
- Due Process
- Technical Assistance
- Flexible
- Timely
- Balanced

Open source vs. Open standards

Open source

- Right to modify and redistribute code is described in licence.
- Patent obligations of contributors is described in licence.
- Generally no disclosure of 3rd party patents.
- Governance if formalized at all, is described on project's web site.

Open standards

- Right to redistribute is described in copyright notice. Right to modify may be restricted.
- Patent obligations of contributors is described by the IPR rules of the SDO.
- Mandatory disclosure of known 3rd party patents.
- Governance is formally described in the SDO's rules and generally requires transparency, balance, etc.

Summary Point #3

- Since open source and open standards operate in the same market, it is not surprising that they've evolved a similar approach of combining technical details with a bundle of rights and obligations.
- However, standards are generally more advanced in their governance models.

How Open Standards Help FOSS

- Interoperability, with proprietary as well as FOSS applications, old, new and future.
- Benefit from network effect.
- Greater eligibility for public sector procurement.
- Avoid reinventing the wheel. Standards are reusable designs.
- IP coverage.

An open standards mission for FOSS

- Support open standards in our code wherever possible
 - When given an alternative, prefer the most open standard that solves the problem
- Use open standards in all our project work, not just in the code.
- Get involved in the most critical standards committees
- If you have developed something that is of general use (out of the box) promote a new standard
- Develop ways to fund volunteers to attend standards meetings, similar to how do for open source conferences. Note: some committees will offer membership for open source implementers at a reduced cost or free.

“The negative impact of standards for competition are mostly caused by a biased endowment with resources available for the standardization process itself. Therefore, even when the consensus rule is applied, dominant large companies are able to manipulate the outcomes of the process, the specification of the standard, into a direction which leads to skewed distribution of benefits or costs in favor of their interests.”

-- Knut Blind, *The Economics of Standards* (2004).

Open standards can learn much from Open Source

- Agility, release early and often
- Many eyes make all bugs shallow
- Online Collaboration (rather than F2F)
- Tooling
- Meritocracy
- Showing value of contributors to employers

Open source is more open, and freedom is increased, when it uses open standards.

This is especially true in a world of many connected boxes.

“Just read the standard”



Q&A