IDA's Open Source Software Workshop, June 2004

'OSS Competence in the Public Sector'

Workshop Proceedings

Session I

Mr. Raymond Robertsen (Norway) on 'The Policy Case for OSS Competence Centres'.

Mr. Robertsen began his presentation by stressing that competition lies at the core of open source software issues. While he considers himself a believer in the free market, he notes that the market will always require certain correctives, as an imperfect market is very damaging to consumers, businesses and society. As Robertsen explained, the monopolies and the cartels often result in high prices and low quality, prevent businesses from becoming more competitive and innovative and new businesses to be created, and prevent further economic growth.

Mr. Robertsen's presentation then turned to the policy case for open source software competence centres. The Nordic Council formally adopted a proposal for a competence centre in February of this year. This proposal, which is also focused on the use and integration of OS and Open Standards in general, originated from work towards securing broadband infrastructure in the Nordic countries and the Industrial and Business Committee's focus on 3rd generation telecommunications. As he explained, he had been in contact with different interest groups throughout the process of writing the proposal and, despite the progress made, not all parties were satisfied with the result of the work.

The work conducted demonstrated that most Nordic countries have adopted national IT-strategies that accommodate the application and integration of OSS in the public sector. However, it was also noted that the implementation of these strategies is limited. This led to the general conclusion that there is a strong need for supportive mechanisms that can stimulate and foster the use of OSS in general. As Mr. Robertson stated, we are confronted with the task of re-directing 20 years of software culture and habits. Furthermore, in their search for good and bad practices the Nordic Council found that many public bodies, like the Finnish Customs Authorities and the Danish Military Intelligence, apply OSS. The municipality of Bergen in Norway recently decided upon a fundamental change in their software-policy, implying a complete transfer from Microsoft to Linux that will require new OSS for 15.000 PCs in the administration and in services such as health care and education.

However, it was also noted that many IT-departments in the public sector shun OSS, finding it unstable and claiming that the lack of service and support is critical and that OSS-systems lack integrated programs. It is therefore evident that there is a need for a relay-centre that can distribute information on OSS in an unbiased manner. In addition, corrective measures to restore the imperfections of the software market are needed. Today's software market is characterized by a strong historic and technical adherence to Microsoft and while Microsoft has contributed enormously to IT-development, it is important to bear in mind that the smooth functioning of the market, undermined by monopolisation, cannot be compromised. To this end, Mr. Robertsen argued that the job of politicians is to pave the way for further OSS development.

Mr. Robertsen then focused his discussion on the need for OS Competence Centres. As he noted, there are universal advantages to applying OS, such as avoiding lock-in to special IT-products, free and full competition on pricing, securing interoperability (although this is mainly an issue for open standards) and stimulating development of new software. In a political context, these issues have been analysed in terms of 4 major goals, including the enhancement of consumer accessibility to a variety of products, free competition in relation to prices, product, suppliers and procurements and "disruptive" technologies and flexibility to ensure innovation and competitiveness in the IT-sector. Evidently, the current state of the market can threaten these ambitions. Other goals include the democratic issues of open standards, allowing all citizens to communicate with public bodies and future conditions for innovation within the ICT-area. Since we are approaching the complete technological integration of computers, cell-phones and television, it is obvious that we can expect a direct spill-over from the current situation on the PC software market to the digital products and services of tomorrow – embedded or not. Therefore, it can be regarded as a political responsibility to secure an open market for products, producers and consumers.

Mr. Robertsen then focused particularly on issues of OSS in the Nordic Region. Given the relatively high degree of IT-penetration in this area, Robertsen suggested that these countries capitalize on the situation, making the Nordic region a frontrunner both in application and development of OSS. Arguing that OS, as a sound, flexible tool based on the sharing of global technology, innovation and improvement, is not only a fact of life Robertsen urged that OSS be exploited to its full extent. However, the ambition of capitalizing in terms of improving the competitiveness of the Nordic countries is highly dependable on the capacity to adjust to these new conditions and the infrastructural starting point. For this reason, the proposal made by the Business and Industrial Committee recommend the establishment of a Nordic OSS Competence Centre – a Centre that can provide free advice and consultancy for private citizens, companies and public bodies. The Centre would also be a forum for development of better practices. Alongside this centre, the proposal called for the establishment of a network in the non-commercial sector between universities and other research institutions. In addition, it was recommended that the Council of Ministers assure that policies for procurement and invitations to tender for software should be formulated to foster free competition, independence and freedom of choice with regard to products and suppliers. Finally, it was also recommended that the Nordic Countries formulate their national IT-strategies along the same lines, thus supporting the use of open standards, and that public procurements and tenders are designed to foster free competition, independence and freedom of choice regarding products and suppliers. The Council of Ministers are currently discussing the possibility of initiating a study into the benefits and potential of such a centre, perhaps as a superstructure on the only existing OSS-platform in the Nordic region, the NordicOS-project.

Mr. Robertsen then turned to a discussion of the political ambitions of such a Competence Centre. Noting that for many OSS remains unfamiliar and unsafe, there is a situation where the potential of OS – either technical or economical - does not penetrate the IT-market.
It is therefore necessary to create an institution that can act as a lighthouse and a spearhead in the process of making the use of OS common. In addition, competences that can support users in terms of consultative support – parallel to the SourceForge-website and the Dutch OSSOS-initiative, are needed. The third and final function of the centre relates to the development of better practices in cooperation with other similar centres. Being loyal to the nature of OSS, these centres would allow for the development and sharing of working-methods, thus contributing to the improvement of services and level of knowledge.

Mr. Robertsen concluded by stressing that a Nordic Competence-Centre would not be able to confront and solve all problems, but it would certainly be capable of addressing many issues and providing the political level of decision-making, with valuable knowledge and input. In borader terms, the competence centre can facilitate a developmental model not based on silos and segments, but on collaboration and knowledge sharing.

We are moving towards the concept of software being something that comes out of the plug in the wall together with electricity or like water from the tap. I'm sure that in 15 years time, we will look back at 2004 and feel embarrassed that it took us so long to understand and exploit the fundamental benefits of OSS.

Raymond Robertsen

Mr. Julio Yuste (Spain) on 'The Economic Impact of the gnuLinEx Project'

Mr. Yuste began with an introduction to himself and to the LinEx project, opening the presentation with a Euronews video clip that explains the background and development of the initiative and stresses the global impact of the project. As stated in this clip, gnuLinEx is a clear example of how one of Europe's poorest regions can take its future in hand, becoming a world leader in the use of free software. Adapting a Debian system into Spanish, gnuLinEx offers what has been called the European alternative to Microsoft. The advantages offered include the fact that it is free, that anyone can use it and adapt it and that it is less vulnerable to virus attacks. In addition, LinEx is constantly adapted to suit the administration's needs. As one representative of the Extremadura administration put it, the balance is shifting towards

freeware simply because humans seek liberty. In addition, the advances made in Extremadura will also serve the development of OSS usage in countries such as Brazil and India.

The video also noted that the Internet, while providing infinite possibilities, could also become another factor of inequality. In order to tackle this problem, a regional intranet was created in Extremadura, making the region the first in Europe for the number of computers made available to students. Showing footage of classrooms in which virtually every desk is fitted with a computer, a teacher explains how this initiative fosters intense dialogue, with the role of the teacher becoming that of a guide that helps the students find knowledge. Free software is, in the context, about equality and accessibility.

As Mr. Yuste explained, Extremadura does not have a competence centre as such, but an entire region developing competence through the daily use of OSS. In addition, the administration of Extremadura is increasingly looking for ways to support the use of OSS by citizens and enterprises. Within a few months a number of companies in the region began enquiring about how free software could be used in the private sector. To this end, LinEx Expresa is currently under development. Born in October 2003, LinEx Expresa is the next step in the development of the gnuLinEx global project, aiming to create wealth in the region with the use of OSS.

There are three essential parts to this initiative: technological enterprises, traditional SMEs and the public administration. The technological enterprises are those who provide or will be able to provide technological solutions based on Free Software or services around free software applications; traditional SMEs often want to modernize with the use of technological solutions and the public administration is interested in giving high quality services to the citizens. Each group offers particular challenges and opportunities. For the SMEs, for example, OSS can offer a better technological solution because it is cheaper, more flexible and secure. However, the challenge lies in identifying the best software for these companies and convincing them that OSS can represent a viable, legitimate option. For the technological company, OSS provides an opportunity to change the business model as it has traditionally been based on license fees. Previously, no technological companies from Extremadura would have been able to truly compete on the European market. Now, thanks to OSS, they have the opportunity to cooperate in innovation and compete in services. Finally, for public administrations the opportunities include the development of a strong regional sector of technological companies, modernise the local traditional SMEs and share knowledge, placing it in the hands of all citizens. The challenge for public administrations lies in its role as an intermediary between IT companies and SMEs.

Mr. Yuste concluded his presentation by offering examples of the progress that has been made so far and the benefits that are rapidly becoming tangible. Young technological companies like .DEV are now able to offer comprehensive OSS services to traditional SMEs, and the public administration has recently launched Facturlinex, a management tool for all the technological companies of the region. The traditional SMEs, for their part, no longer have to pay license fees; the money they invest therefore goes into the economic development of the region.

Public administrations now have the opportunity to develop a strong regional sector of technological companies based on services around FLOSS applications, thereby creating wealth and employment in the region.

Julio Yuste

Questions and Answers from the floor

Mark Bressers, from the Dutch Competence Centre, began by asking about the economic approach and the way in which gnuLinEx stimulates the economy. He enquired what had been the costs and whether there been any analysis of costs and benefits for both the local

economy and for the government. Mr. Yuste responded that approximately eight months ago there were no IT companies in the region, but that the past eight months have seen the creation of about ten companies. Traditional SMEs are also able to reap the benefits of these developments.

Bart Knubben, also from the Dutch Competence Centre, wondered how many programmers and developers were needed to make the LinEx distribution. Mr. Yuste explained that two developers, two teachers from Extremadura, supported LinEx. The first version had been made in Madrid and then these two teachers improved it. In addition, there are also nearly 25 technicians developing the entire application.

Mr. Bud Bruegger, from the Comune di Grosseto, asked if it was difficult to find the required expertise in the region. Mr. Yuste explained that it was indeed difficult. However, now the many IT professionals that had previously left the region for professional reasons were looking to come back.

Mr. Paul Cooper, from Open Advantage, asked if there were any other applications that had been developed. Mr. Yuste responded that they were also in the process of developing LinEx distribution, educational applications, and other free software applications for businesses that will appear in three or four months.

Mr. Bernhard Schnittger concluded the question and answer session by noting that the first two presentations had shed light upon the difference between the issues of policy with a big P and a little p. As he explained, *policy* represents the requirements that come from the public sector, while *Policy* refers more specifically to the goals underlined by the Lisbon initiatives. It is necessary to tackle OSS issues on all levels. For example, it is in the interest of the public sector to develop service providers for itself; as the example of IDA has shown, for OSS to be used in the public sector, there must also be service providers that support its use.

Mr. Petri Räsänen (Finland) on 'Open Source and Regional Growth: Possibilities and Challenges in the Twilight of Open Source Software Business'

Mr. Räsänen began with a brief introduction to himself and his region. He is responsible for running the OSS Competence Centre, COSS, in Tampere Finland.

COSS started at the beginning of 2004, which means that most of the services are not yet perfected or running. COSS is not an ideological centre; rather, it is about the business potential of OSS. As Mr. Räsänen explained, it was possible to overcome the profound economic crisis in Finland at the beginning of the 90s, through the strong growth of the ICT sector, the success of companies such as Nokia, technology-driven development and regional development strategies. Currently, they are now facing a lag in growth; the key question at the moment is therefore how can the Finnish economy, and the economies of the regions in particular, recover and survive? Mr. Räsänen explained that OSS will play a large role here. New growth areas must be identified, new categories and segments of ICT will emerge and global and local business expertise will be required. In addition, OSS will require research and development. As Mr. Räsänen stressed, OSS should not be seen as an isolated phenomenon, it is part of the regional strategy.

On one hand, OSS enables and requires versatile local services and business. On the other hand, OSS also lowers the barriers of eAdoption. Naturally, there is more room for service when you don't have to pay so much for licenses. In this manner, OSS speeds up development, making it possible to access new user groups and providing room for ICT convergence. It was also noted that if the region is able to gain expertise in OSS it can give the region global leverage if, as Mr. Räsänen argued, OSS will be a central part of the ICT of the future. In this light, the practical mission of COSS is to identify and communicate the versatile ways of using OSS in different industrial sectors and user groups.

Other COSS objectives include the provision of information and networking services required in OSS utilization and diffusion, the organisation and execution of development projects that remove obstacles of OSS deployment, the creation and promotion of networked OSS service

business, the collaboration of developer and user companies and the promotion of Finnish OS businesses and know-how internationally. Practically, COSS is organised around seminars, workshops, and other basic information services about OSS. Mr. Räsänen also noted the need to provide value-added services, including IPR and legal-consulting services, to tackle tangible difficulties that appear. COSS is also in the process of developing an OSS Yellow Book, a guide to applications and software, and an OSS Blue Book, which would be a directory of OSS service providers that could offer support. Finally, COSS is also about providing a community environment. From the development side, COSS will focus on helping non-technical SMEs. They will develop embedded OSS, which is central to particular types of industry. COSS will also partner with other Finnish projects, including projects for OSS in public administration and OSS in learning.

Although many lessons have been learnt over the past months, there are still key issues that remain to be solved. Mr. Räsänen referred to the current chicken- and egg dilemma, where supply and demand exist but do not necessarily meet. It is therefore necessary for third parties and service organisations to somehow link the services; this is the precisely the objective of the yellow and blue books. In addition, Mr. Räsänen noted, there is still much ignorance and bias when it comes to OSS. It is not enough to educate politicians and software developers; IT support, business management and the general public must also be educated. The sharing of best practices and experiences, not only across regions and industries but also countries, is therefore necessary.

Mr. Räsänen concluded with a few words concerning both Open Source and Proprietary Software. While OSS can be seen as low risk, requiring modest investment and leading to moderate growth, proprietary software represents high risk, high investment and high growth. From the regional point of view, he stressed, both are necessary. The question is whether or not, and how, they can be compatible and complementary.

Ignorance and biased attitudes continue to prevail when it comes to OSS. Educational instruments and actions are required across the whole decision-making chain of the software business.

Petri Räsänen

Questions and Answers from the floor

Mr. Brahim Souabi, from the Dutch Competence Centre, raised a question concerning the removal of obstacles to OSS development: He wanted to know how has this had been done by COSS. Mr. Räsänen explained that not all projects have been completed, but that the main obstacle that they are currently trying to deal with is the lack of meeting between supply and demand. There is also the question of maintenance, and technical solutions are needed to deal with these problems.

Ms. Athina Trakas, from CCGIS, expressed agreement concerning the need for complementarity between open source and proprietary software.

Mr. Ed Downs, from the NCC, asked how the companies included in the blue book would be selected. Mr. Räsänen explained that a review system had been put in place that is verified by COSS in order to obtain maximum accuracy of information.

Ms. Caroline Halcrow, from the British eGovernment Unit, wondered how COSS is funded? Mr. Räsänen explained that 75 percent of the funds are public and the remaining 25 percent come from membership fees and project participation fees. However, how the funding will be obtained after 2005 has not yet been confirmed.

Mr. Tomas Jonušas (Lithuania) on 'Why do governments have to promote OSS?'

Mr. Jonušas began with a brief introduction to the work of Atviras Kodas Lietuvai (Open Source Lithuania); a non-governmental organisation which is responsible for lobbying for

governmental projects. AKL would like to see OSS used across all governmental levels, from the ministries to the parliament, and aims for both server software and desktops. For AKL, their governmental lobbying is intricately related to the issue of growing economies and the benefits that can be reaped from OSS.

As Mr. Jonušas explained, lobbying is essentially about influencing decision-makers. AKL view the main beneficiary of their lobbying work as the country itself, as they believe that the use of OSS will stimulate competition and the local IT industry, create new jobs, decrease software "piracy" rates and allow users to freely choose their software vendors. The benefits are not only limited to the government sphere, as Mr. Jonušas argued, but will also help reduce general costs and save tax-payers money.

However, when it comes to decision-making, it is necessary to consider exactly what type of decision should be made. Who is able to initiate a process? Who is able to prepare a decision? Who is able to promote OSS? And who is ultimately able to take responsibility for the decisions made? Unfortunately, Mr. Jonušas noted that many of the issues surrounding decision-making are still not clear and there still no good practice at governmental level in the EU.

While for AKL there is no doubt that OSS is a legitimate and beneficial option, however, it is frequently argued that OSS advocacy will not change the situation significantly as there is currently enough information available about the benefits of OSS. For this reason, AKL's strategy for the next two years will be to reduce risks of decision makers. In this light, the EU could help move a step in the right direction by establishing an EU policy on OSS use and on open document formats. More success stories would also help push others in the right direction. In addition, it could be interesting to create a database of best practices across the EU. Rather than merely assuring decision-makers that OSS does represent a legitimate and beneficial option, these initiatives, could offer tangible evidence of OSS success.

Mr. Jonušas' presentation then turned to focus specifically on the Lithuanian governmental institutions and projects that could influence future actions in the field of OSS development. He presented the examples of two well-known cases in Lithuania; the Ministry of the Environment, which now has over 500 computers running with Open Office, and the Vilnius County Municipality which has 40 computers running with SuSE Linux. As AKL continues to stimulate the use of OSS in Lithuania, they hope that other governmental institutions will follow these two examples. Their hope is that confidence in OSS let users migrate from proprietary to open source software, boosting the availability of OSS services and products on the market and allowing OSS take a significant market share.

Most of key decision makers know about benefits of using OSS; OSS advocacy will not change the situation significantly. The strategy of lobbying OSS at governmental level for the 2005–2006 must therefore be to reduce the risk for decision makers.

Tomas Jonušas

Questions and Answers from the floor

Mr. Bernhard Schnittger stated that he was intrigued about Mr. Jonušas' statement on lowering the risks for politicians. For this reason, he noted, it is important to look towards what others are doing in order to support their own case.

A participant, from IBM, asked how the development of OSS would be done? Mr. Jonušas replied that at the moment there was no real business model for OSS. The participant stressed that, although OSS is often referred to as free, it should be kept in mind that there are costs.

Session II

Mr. Géza Novák (Hungary) on 'Open Source Software Competence Centres'

Mr. Novák began his presentation with an overview of OSS Competence Centre initiatives across Europe. According to eEurope, Competence Centres at European level should be an IDA initiative. At the moment, the establishment of these Centres at European level is indeed foreseeable, as they are currently in the phase of task specification and organization structure planning. The application of open source software is also supported by the EU, in the form of simple, usually civil, organizations that are normally supported by governments. As Mr. Novák explained, even if these organisations currently have no official authority they have "moral respect" that is assigned to them through governmental support and are therefore crucial to giving OS development a helping hand. OS Competence Centres can therefore be dedicated to a larger volume of users and are related to participants on the market, supporting cooperation between the various organisations that currently exist to promote OSS.

Mr. Novak then moved on to a discussion of the particular case of Hungarian Competence Centres. In Hungary, he stated, cooperation between associations of OS experts would be one of the primary goals. Competence Centres could here be based on the infrastructure of the Association of Hungarian Linux Users (AHLU) and supported by the government. Major activities of the Competence Centres could include creating cooperation between Hungarian support companies, solution providers and big user groups, or across international organisations and administrations, by sharing and developing information about OSS, accidental incident maintenance, collecting OSS-related information and sharing it via the Internet. As Mr. Novák explained, its role would not be to provide a concurrent support organization, but to inform the users, offer alternative software, and support their usage by partners and local system administrators.

The OSS Competence Centres would also have the role of keeping in touch with centres in other countries, helping protect against attacks on security, run an Internet-based knowledge base, which contains structured, organised information on OSS, and offer an analysis of new developments to make recommendations for the system administrators. While a lot of work remains to be done, Mr. Novák expressed his confident belief that OSS is central to the electronic future for Hungary.

The OSSCC-Hun could be the cooperation of the associations of the open source experts (AHLU-FSF-BSD...) and could be founded on the infrastructure of the AHLU and supported by the Government.

Géza Novák

Mr. Mark Bressers (the Netherlands) on the 'Dutch Programme on Open Standards and Open Source Software for Governments'

Mr. Bressers began with an introduction to the Dutch Competence Centre that has been running for one and a half years in the Netherlands. The Centre is part of the Dutch organisation for eGovernment (ICTU) and was commissioned by the Ministry of Interior and Ministry of Trade and Economics to combine work on open standards and OSS. In the Netherlands there are currently over 1400 national agencies, provinces and local municipalities involved in eGovernment initiatives. These are all independent, which implies that imposing OSS on a large scale can be particularly difficult. In addition, there is also the issue of the accessibility and availability of the information; despite eGovernment advances, many national sites can only be supported by Microsoft browsers. However, Mr. Bressers noted that the current state of the economy is leading the government to look increasingly towards OSS, as it is becoming necessary to identify ways to promote both greater efficiency and savings.

As Mr. Bressers explained, there are many drivers that pave the way towards OSS. Vendor lock-in can be one. In the IT local market there are currently two main suppliers, which is an important reminder that it is not always accurate to blame only Microsoft for monopolisation in all countries. There have also been debates in Holland about whether or not the information that the government stores will be accessible in 15 or 20 years. Finally, another important issue is that of economic growth and EU policies, particularly in the context of the millions of Euros that are 'sent' to the US each year in the form of software licenses.

OSS has made much progress in the Netherlands in recent years. In 2002, a parliamentary vote determined that all government organisations should use open standards for communication and messaging. However, this is not yet mandatory. At the moment there is the promotion of equal opportunities for open source software and closed source software.

The Dutch Competence Centre on open standards and OSS for governments works for the whole of the public administration, including local municipalities, agencies, and provinces. The Centre also cooperates with other organisations within specific sectors (education, healthcare etc.) and "train the trainers" is one of its core philosophies. The Centre's budget is approximately 1.2 million a year; and it is composed of a team of ten persons with technical, legal and communication competences. The technical skills are necessary to ensure that the information they provide is both independent and trustworthy. The legal skills have perhaps proven even more important, as questions concerning the legal legitimacy of OSS are often raised. Mr. Bressers also stressed the importance of communication in this field, and the caution that accompanies decisions about how the subject should be put forward and information disseminated. As he underlined, it is not appropriate for the Centre to promote OSS in a 'fundamentalist' manner; they must provide clear, unbiased information to allow their target audience to make the choices that most benefit them.

For this reason, one of the main tasks of the Centre is the creation of awareness and the dissemination of knowledge. As Mr. Bressers explained, it is frequently thought that only idealists use open source software. The aim of the Competence Centre is therefore to show that it is a valid business case and that OSS can be supported by profit-making companies. This calls for particular focus therefore on the commercial side of OSS.

Another important task is the creation of guidelines and best practice manuals. These include information how to start, choosing licenses, guidelines on liability issues. They also provide information on procurement issues and how OSS can be used legally and safely in procurement processes. Well-documented best practices are also needed to provide 'proof' of the benefits that can be reaped from OSS. In this context, the European Commission could offer valuable support through services such as translation, to ensure that this information can reach the widest audience possible, or a Europe-wide OSS exchange site.

Finally, another central task of the Competence Centre is providing help and support. Trying to avoid excessive involvement in the political issues that surround OSS, the Centre offers those who are interested a hand, through practical help and advice.

Mr. Bressers noted that 85 percent of all Dutch public organisations currently use some form of OSS. As he stated, it is reassuring to see that in the Netherlands the question of whether or not OSS should be used has already been addressed, it is now simply a matter of determining how much more OSS can be used. It was also noted that while the Dutch governments generally use OSS they rarely distribute it; Mr. Bressers also reasoned that software that is developed with taxpayer's money should be open and accessibly to all and therefore freely distributed.

The presentation concluded with an overview of what Mr. Bresser believes are the key success factors of the Competence Centre. He stressed the importance of communication in overcoming the prejudices against OSS and to show that it is both legitimate and safe. In order to do so, however, these prejudices must also be analysed and approached from an unbiased perspective. For this reason, the Centre must present itself as an independent organisation that does not exist for commercial reasons. Finally, the last success factor is the

combination with open standards, as virtually no one can claim to be against open standards. Open standards can therefore be seen as a good carrier for the mission of this Centre.

As the presentation concluded, Mr. Bernhard Schnittger asked for a show of hands as to who is currently involved in setting up software repositories. Representatives from France, Spain, Germany raised their hands, making evident the importance of the issue of linguistic barriers.

The Centre cannot promote OSS in a 'fundamentalist' manner; they must provide clear, unbiased information to allow their audience to make the choices that most benefit them.
Mark Bressers

Questions and Answers from the floor

Mr Miguel Amutio, of the Ministry for Public Administration in Spain, explained that they were currently considering deploying a similar instrument to the OSOSS platform and wondered how to make the administrative units deliver and promote participation. What are the drivers and the limiters? Mr. Bressers replied that every incentive is needed to stimulate administrations to deliver OSS. OSOSS tries to make it easy for administrations, guiding them to help get the software on the platform and educating them in terms of the freedoms and benefits they can reap. He also noted that financial elements can help, giving the example of the local municipality that didn't want to give their software away after they had paid for it themselves. In this case, it was useful to give them a financial incentive, although this must be kept under control as the notion of financial incentives could, in some instances, be seen as contradictory to the very principles of open source.

Mr. Bernard Benhamou, of the French ADAE, agreed with Mr. Bressers' statement concerning OS 'fundamentalism' that could alienate potential users. He also stressed the importance of complementarity, as raised in the first session by Mr. Räsänen. However, he noted that more and more tools are becoming mainstream, moving the debate beyond the political realm. Mr. Benhamou stressed the need to push for a better understanding of the OS phenomena and for the coexistence of open source communities at large.

Dr. Barbara Held, of the German Federal Ministry of the Interior, asked if the Dutch Competence Centre stimulated the use of OSS only among public administrations. Mr. Bressers responded that their work focuses mainly on public administrations but this can also include, for example, the healthcare sector. In this sense, OSS is a broad societal issue in Holland.

Mr. David Cronin, of the British Office of Government Commerce, was interested in the total cost of ownership studies and asked Mr. Bressers to speak of the work you done in this area. Mr. Bressers explained that there are many studies and conclusions currently available, but most focus on the costs rather than the benefits. For this reason, OSOSS encourages all organisations to make their own TCO analyses.

Mr. Paul Cooper (UK) on 'OpenAdvantage –Supporting Open-Source in the West Midlands'

Mr. Cooper began his presentation with a general introduction to IDA and Competence Centres. As he noted, IDA is about efficiency and interoperability and for this reason must necessarily involve open standards and open source software. Competence Centres are able to offer the support needed both directly and indirectly.

Open Advantage is the first vendor-neutral OSS centre in the UK, funded by Advantage West Midlands and developed in collaboration with NB2BC and NCC. The objectives of the Centre include promoting the idea of OSS, raising awareness and educating people. Open Advantage seeks to become a centre of excellence, that is, to be thought of as the best place

to go for knowledge about OSS, and create a regional support structure to build the OSS community in the Midlands. As Open Advantage was only launched in January of this year, there is still a lot of work to be done.

Open Advantage covers the whole of the West Midlands and a wide range of organisation types. They also cover all sectors and deliver across the supply chain, not just to end-users. The aim of the Centre is to support all parties in order to ensure that both the delivery and development of OSS runs smoothly.

As Mr. Cooper explained, the tasks of the Centre also include work with the marketplace in order to get key groups to understand and use OSS. As he noted, a lot of OSS can run on different models, for example ASP models. In this context, the Centre prioritises hands-on use and demonstrations, believing that once people can see and use OSS a lot of questions and prejudices disappear. Another element that the Centre stresses is that their work is not about replacement but about enhancement; it is therefore necessary to be honest and unbiased in order to gain peoples' trust. For this reason, Open Advantage underlines the importance of meeting and learning from the people who have experiences with OSS on the ground, by arranging for meetings between Open Advantage representatives and users and events that allow these users to come into contact with each other. Some of the activities include seminars and workshops that target vendors and end users, and their focus can be either technical or managerial. Finally, Mr. Cooper stressed the importance of directly assisting organisations through consultations, testing and evaluations. As he noted, many people often fail to understand that 98 percent of available OSS is not very good but that it is important to find the small percentage that can be good and useful. To this end, it is important to provide an evaluation-type service and offer learning opportunities through training courses and community regeneration projects. Open Advantage offers a seminar room and a demonstration lab so that IT vendors can come and test their software.

Mr. Cooper's presentation then turned to a couple of case studies. IT consultant Robin Layfield, for example, used the Competence Centre to obtain information about OSS and how it could be used. Clockwork, a company that had already done a lot of OSS work, relied on the Competence Centre for strategic advice about OSS deployment.

The current activities of Open Advantage include recruitment, seminars and conferences. Mr. Cooper noted that the European Commission should organize more meetings and workshops to allow key players to meet and share experiences. Like Mr. Bressers, Mr. Cooper also stressed the need for the facilitation of communication and translation. In addition, he noted that other possibilities for Competence Centres could include virtual centres where local experts deliver advice and support on the ground, or the creation of a network of centres that specialize in particular areas. These are types of initiatives that could be supported by the EU.

Finally, Mr. Cooper noted the need to build a credibility platform in order to get rid of the 'fear factor' and the prejudice regarding OSS.

The message that we try to get across is that OSS is about enhancement rather than replacement. Open Advantage is there to promote, encourage and assist.

Paul Cooper

Questions and Answers from the floor

Caroline Halcrow, from the British eGovernment Unit, was interested in the importance of physical presence and the use of the demonstration labs, wondering how useful they had proven. Mr. Cooper explained that for Open Advantage the lab had been particularly useful, as, when approached abstractly, people have many abstract objections to OSS that the labs helped dissipate. From his point of view the lab is actually crucial.

Mr. Constantinos Velentzas, of European Dynamics, asked for Mr. Cooper's opinion on what were the most popular open source tools? Mr. Cooper explained that at the moment they had no concrete means of taking statistics on this.

Mr. Knut Yrvin (Norway) on 'Building a FOSS Competence Centre with Skolelinux'[1]

Mr. Yrvin's presentation focused primarily on the building of the Competence Centre and issues of financing, evaluation and competence. As he explained, Skolelinux is a complete ICT solution developed for the schools which includes network architecture out of the box, an operational concept, a digital user profile, OpenOffice and 75 user programs. In addition, Skolelinux was developed in national languages with the schools' curriculum and budget in mind.

As Mr. Yrvin explained, a few years ago it was determined that technology in schools could be improved, particularly in relation to projects developed to support the exchanges of experience by pupils. Having decided that in many ways these exchanges could be facilitated by the use of ICT, Skolelinux was set in motion. Since, there have been several other countries that have participated in this project and there are currently about 90 schools that use Skolelinux. In addition, independent TCO analysis has shown that a significant amount of money can be saved through the use of OSS.

Mr. Yrvin noted that Skolelinux started with political questions as many Norwegians were rallying to have their software in their own language. After working with the Ministry of Education and Research it was determined a credible organisation would be necessary for further work on maintenance, coordination and common electronic signatures and entities. Today, the effort is privately funded by the SLX Debian Labs foundation, about 250,000 Euros a year, and the political pressure from the Norwegian parliament is increaseing. Some of the pressure is caused by The Norwegian Board of Technology's statement on democracy and competition[2]. However, the organisation remains necessary for other, more practical reasons. The Ministry of Education and Science will take a part in the large voluntary community work that has been done in Skolelinux so that they can continue pursuing the work in a form that gives the benefit to the schools and give sufficient external conditions for those who are following up these efforts. Developers find it very interesting to apply these ideas in other areas. In addition, the particularities of OSS raise other questions: who can be called when there is a security breach or when there are questions of maintenance? A credible organisation remains necessary to tackle these issues, according to the Ministry.

Mr. Yrvin also noted that unfortunately it would seem that the municipalities are not yet ready for OSS. While they currently have negotiations with 530 public offices and municipalities, these had hoped for discounts, not solutions. In addition, public ICT-project cost overrun is around 67%, while the private sector has 21% budget overrun.

As Mr. Yrvin explained, it is easier to organize open source projects because of the openness, but there remains a general preference for Microsoft's business-model of selling shrink-wrapped packages. In addition, the gap between users and developers becomes a social organisational issue, and a licensing issue where traditional software-development and proprietary contracts don't support what's in the users interest. This results in what Mr. Yrvin referred to as a "world of mediators" in which the interests of the users and developers are

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[1] Scientific articles used as a background for the presentation include:

*Jonathan Grudin, The development of interactive systems: Bridging the gaps between the developers and users (http://www.ics.uci.edu/~grudin/Papers/IEEE91/IEEE91.html)

*The National Science Foundation (NSF) US: Open Source: Faster, Better, Cheaper: Open-Source Practices May Help Improve Software Engineering (http://www.nsf.gov/od/lpa/news/03/pr03132.htm)

*When is Free/Open Source Software Development Faster, Better, and Cheaper than Software Engineering?, Walt Scacchi, Working Paper, Institute for Software Research, UC Irvine, August 2003. (http://www.ics.uci.edu/~wscacchi/Papers/New/Scacchi-BookChapter.pdf)

[2] http://www.teknologiradet.no/files/7polished_copy.htm and http://www.teknologiradet.no/files/tek_newsletter_nr7.pdf

marginalized. The only means of de-marginalizing them involves sharing applications, reintroducing user participation and increasing the opportunities for making systems that the users will ask for. In this context, it is important to make the projects and solutions more visible and show the positive results.

Finally, Mr. Yrvin addressed the question is how IDA can contribute to OSS. Mr. Yrvin noted that source code should be made available on IDA's home pages, as well as providing best practices. In addition, IDA needs to reorient to a bottom-up approach since OSS development is bottom up.

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What's wrong with just using shrink-wrap products with discounts? You are narrowing and excluding the true power of F/OSS development.

Knut Yrvin

Mr. Egon Troles, on 'What has happened in Germany on OSS Competence Centres?'

Mr. Troles began his presentation with a brief overview of OSS Competence Centres. The idea for a Competence Centre was first presented by a representative of the Federal Government Co-ordination and Advisory Agency for IT in the Federal Administration (KBSt), during an IDA expert meeting in Brussels. In 2002 a project group was set up and there were two persons in the security agency. The objective of the project group was to determine the agencies that have set up projects in the area of open source that wanted to migrate. These experiences were to be used as a lighthouse for further developments.

In March 2004, a virtual Competence Centre was set up, with one person in the coordination and advisory board (KBSt), one person in the security agency (BSI), and one person of the federal traffic administration. The main objectives were set up before CeBit and included the exchange of best practices on the web, networking between the projects that are mostly unknown, and updating the migration guidelines. Migration guidelines were developed and there have since been about 80,000 downloads. The initiatives were primarily set up to see whether or not it was economical and beneficial to move to OSS; they have since been asked to update the guidelines and put a view on Microsoft on these guidelines. Many parties have also asked for information about relevant projects.

Mr. Troles stressed that it is a work in progress, including support for LinuxTag and work on SAGA and the Open Document Format. As Mr. Toles noted, many problems have been encountered. In the first place, there are not enough resources to allow them to provide direct support. It has also become clear that the website is not enough for networking- agencies and organisations also need a shoulder to cry on. While knowledge about OSS is growing, Mr. Troles argued that it is growing too slowly.

Foreseen activities include more action on the Internet and a need for better synergies with other ministries (following example shown by Skolelinux), in particular, the Ministries of Education and Science and Economy and Work. There is also a need for more workshops together with the federal academy for public administration, more support to projects that need help and the implementation of OSS strategies in procurement. In addition, other objectives include doing more work with the press, as it is important to not only do good things but to disseminate information about these activities. Mr. Troles also noted that there should be more work done on open standards, as well as the implementation of ODF in SAGA.

Finally, Mr. Troles expressed his hope that the OS Observatory is only the beginning of the European Commission's initiatives for OSS. He also called for the Commission to provide

support for the translation of documents into English and the creation of guidelines for the setting up of competence centres.

Believing in Europe, we hope that the OS-Observatory is only the beginning. We look forward to the creation of guidelines for the Member States to set up national OSS Competence Centres and, based on the eEurope 2005 action plan, guidelines for Open Standards.

Egon Troles

Questions and Answers from the floor

Ms. Athina Trakas, from CCGIS, noted that companies working with public administrations really know what the public administrations need and asked for Mr. Troles' opinion on this matter. Mr. Troles explained that a brochure has been made available on the ministry website which mentions Linux and other OS solutions.

Mr. Bernhard Schnittger closed the session by noting that, in terms of recommendations for the European Commission, there are three levels of action evident. The first level is quality coordination, concerned with understanding where each country is going and how they are getting there. The second level is sharing information and raising awareness by providing documentation and information online. The third level is practical collaboration, which deals with very specific issues, as it is useful to benefit from each other's experiences but it is also necessary to establish a common structure.

Session III

Dr. Bud Bruegger (Italy) on 'Introducing Open Source in Public Administration'

Mr. Bruegger discussed the experiences of the application of OSS in the Comune di Grosseto. He began his presentation with a discussion of what he termed the 'entry barrier' to the use of OSS by public administrations, which is composed of a lack of resources, opportunities and adequate timing. Dr. Bruegger focused particularly on the issue of timing, explaining that it is never the ideal time to start but it is necessary to see it as a process. As he argued, In order to understand OSS and like it, it is necessary to experience it. They have now obtained one year of experience with OSS use at the Municipality of Grosseto.

Giving a brief overview of the values of OSS, Dr. Bruegger explained that there are two ways to start an OSS project within the public administration. The first option is the implementation of a top-level decision, in which everything is changed in 1 year. The second option is to introduce the changes gradually, one step at the time. This second approach has the benefit of being low risk and allows people to gain understanding and confidence, acquire skills, community and culture.

In the experience of the Municipality of Grosseto, experiences were disseminated both internally and externally. The project they selected to do start with was for the issuance and use of electronic ID cards. This was a second National Pilot Project that involved 56 Municipalities and aimed to be replicated to 8100 Municipalities. The government funded this pilot project.

The benefits of this experience have been multiple. Dr. Bruegger explained that there has been a drastic amplification of knowledge, skills and resources. There has also been knowledge transfer from the community to the town, leading to an internal capacity growth and thereby increasing growth in confidence and appetite for OSS. Many particular issues were also encountered, including -the slow rate of the spreading of the culture of collaboration, especially within the public administration. There is also a different relationship with providers that they have not entirely dealt with but are in the process of doing so. Finally, there are some impediments met with by the central government when it comes to the sharing of resources, the legal and the contractual issues and the impact of excessive secrecy.

> *Open Source is not only about cost savings and licenses. It is essentially about collaboration and sharing.*
>
> *Bud Bruegger*

Mr. Søren Roug (European Environment Agency) on 'EIONET's Experiences with Open Source'

Mr. Roug's presentation began with a brief introduction to EIONET- a data collection agency that collaborates with all of the states of the EU. EIONET currently has about 40 websites all over Europe, an extranet and a data collection network called ReportNet that is sponsored by IDA. Because data sharing lies at the core of EIONET's function, there is much impetus to use OSS.

As Mr. Roug explained, incidents in 1998 and 1999 also provided motivation to move towards OSS. It was noted that for some of the software being used, it was not possible to move from one version of an operating system to another. Because the software was proprietary, they were not able to distribute it to others. Furthermore, for their websites for which they did not have the source code, they could make no modifications to the software. This implied that for any modification they wanted to make they would have to go back to the vendor, who would then determine how, when and at what price the changes were to be made.

Another problem experienced was with their helpdesk based in Brussels. Users across the MS would phone in to report bugs or ask questions, but it soon became evident that the

helpdesk is only good to a certain degree. As soon as there were very technical issues to deal with, since they didn't have the source code, they found themselves blocked. In this type of situation, you are obliged to believe whatever the vendor tells you. In this case, the vendor has a complete lock-in on the software that was being used by EIONET.

In order to solve these problems, they determined that it would be best to develop everything that is released on their website themselves. This implied that they could shop around for a better contractor, and there was therefore increased competition because they could switch to another company if the fees are too high. In addition, development was facilitated, as it was possible for other companies to add to the software. In this sense, there was a certain protection of the investment, since its 'safety' or durability no longer depends on the vendor. In addition, Mr. Roug explained, OSS was particularly suited to the internal structures of EIONET. As their work is often divided by speciliazation, (for example air, water, etc.) it was beneficial to create software that could be used for more than one project. OSS has also made it possible to share technical solutions with the Member States where they don't have the resources to develop their own.

The solution? We release everything we develop (or get developed for us) as Open Source.
Søren Roug

Dr. Riikka Rahikainen (Finland) on 'Open Source Software in Education and Learning in Hämeenlinna, Finland'

Dr. Rahikainen began by discussing the manner in which the interest towards OSS development in education and learning got started in the Hämeenlinna region of Finland about one year ago. Hämeenlinna was looking for a virtual learning environment for the schools run by the city, but the learning environments available on the market were too expensive and not quite suitable for their needs. Simultaneously, the largest Finnish polytechnic in Hämeenlinna, Häme Polytechnic, was looking for new ways to structure its online learning distribution and was not satisfied with the rising prices of the commercial educational software. A local e-learning company, Mediamaisteri, expressed its interest in OSS development and the possibilities of online-learning delivery and management. The combination of these elements caused the "OSS-boom" that the Hämeenlinna region is experiencing today.

At the moment, Open Source Software is used by the city of Hämeenlinna and by the Häme Polytechnic as part of their online learning activities. The OSS used by these organizations are Moodle and FLE, which is designed especially to carry out problem-based-learning activities. In addition, some companies have expressed their interest in using OSS as a part of their knowledge management and competence development systems.

The OSS development in education and learning is coordinated by the Häme Centre of Expertise Program. This Centre strongly unites two fields of expertise; vocational competence development and e-learning. It operates in collaboration with regional business life, education and research centres and the city of Hämeenlinna and its surrounding cities by recognizing the research needs and the new challenges of competence development. Support is given particularly to projects that target the development of new learning environments, methods, contents and working practices. This Centre is a part of the Finnish national centre of expertise program (www.oske.net) led by the Ministry of Interior.

The Häme Centre of Expertise has recently started a project that will run from 2004 to 2006 to develop OSS operation and business models. The OSS pilots in Hämeenlinna region include projects on OSS in school education and learning, OSS in SME's knowledge management and competence development, OSS as a service business and OSS combined with the personal identification systems. The problems that have thus far been encountered by "the OSS-movement" include a lack of knowledge of the possibilities of OSS (in public administrations, schools, universities, large companies and SMEs), doubts concerning

reliability, safety and development of OSS, lack of knowledge about the licensing models and lack of OSS consultancy companies in Finland. It has become evident that the use of OSS requires quite a high level of knowledge on how IT and data processing systems are built; if the user lacks that knowledge an OSS consultancy company is needed. Furthermore, as Dr. Rahikainen explained, much more information, publicity and open discussion is needed in order for OSS to continue to spread. Finally, collaboration between national and EU-partners is essential to ensuring wider use of OSS in the future.

Much more information, publicity and open discussion is needed in order for Open Source Software development to "conquer the world"!

Riikka Rahikainen

Mr. Lutz Henckel (Germany) on 'Fostering Open Source Software Development & Deployment'

Mr. Henckel's presentation focused on the development of BerliOS, an initiative to foster development and deployment of Free Software/Open Source Software in the industrial and public sectors. BerliOS was funded by the German Ministry of Economics and Labour (BMWA) and by industrial partners, and is operated out of the Fraunhofer Institute for Open Communication Systems (FOKUS) in Berlin. The project financing started in October 2000 and ended in July 2003, but its activities continued after the end of public financing. The goal of BerliOS is to foster OSS groups of developers, users and enterprises and to establish mediation between these groups. In addition, BerliOS initiatives include the foundation of an Open Source Centre.

BerliOs also provides a set of web-based services including: development and project Management (Developer.berlios.de), OSS announcement and retrieval (SourceWell.berlios.de), project mediation and controlling (SourceAgency.berlios.de), best practice examples (SourceLines.berlios.de), yellow pages for OSS enterprises (SourceBiz.berlios.de), documentation (DocsWell.berlios.de) and a developer directory which gathers the skills and experiences of developers (DevCounter.berlios.de).

The support that BerliOS offers can be divided into three areas: support for developers, enterprises and users. In order to support the developers they have created a platform which acts as a software repository with revision control. In addition, this platform offers facilities for the administration/management of developers and rights, a project presentation on the Web, software distribution, group communication using mailing lists and public forums, bug tracking, surveys and rating and a project directory with search features.

Mr. Henckel also stressed that in order to support users it is important to present comprehensive documentation, and BerliOS now provides a broad information source which includes a documentation site (DocsWell.berlios.de), a software/product catalogue (SourceWell.berlios.de), information on enterprises providing services, support and solutions (SourceBiz.berlios.de), news and discussion forums (News.berlios.de, OpenFacts.berlios.de) and best practice examples for SMEs and the public sector (SourceLines.berlios.de). Finally, the abovementioned yellow pages of OSS enterprises also provides invaluable support. This will enable customers to find the solutions and the exact service providers that could suit their needs.

Mr. Henckel then moved on to discuss their role as mediators between the various factions that he had described. As he explained, the mediation between these groups is necessary because many applications are missing in the public sector and the development of these applications is very expensive. BerliOS felt that it would be good to use the financial resources of public administrations to share certain applications. Mr. Henckel concluded that the public sector can benefit from existing OSS but cannot finance further development at the present time. While the missing applications can only be created by the efforts of public administrations, collaboration can save a significant amount of money. For this reason, BerliOS Services aim to help to coordinate the development and deployment of OSS and the

exchange of information within the public sector. While internationalisation already exists, there is still much progress to be made. Mr. Henckel expressed the hope that BerliOS become a node in a distributed European OSS Support Network, noting that the necessary links still need to be reinforced and the European Commission must establish directories to facilitate communication across Europe.

Additional motivation and financial funding for free software developers are needed to make them more oriented to the needs of the Administration.

Lutz Henckel

Mr. Alastair Burt (Germany) on 'The German Centre for AL'

Mr. Burt described the progress that has been made with ASWAD, a yearlong project that ran between March of 2002 and March of 2003. The project was based on cooperation between a number of partners including DFKI and ICUBE and then several end-users including COCOF, the Scuole Superiore. The technical objectives of the project included a unified Internet solution based on free software, with integrated workflow management. It was a take-up project in the sense that it could be taken up and used by others.

The project also had particular business objectives. It was seen as useful to furthering the free software service industry while providing exactly what was needed. A lot of the content or document management systems available at the time were costly, complicated and had the capacity for lock-in. It was therefore necessary to think carefully about how the processes could be improved. In actual fact, the development of the project was based on two types of workflow: document based and the activity based. These workflows are supported by different software; Linux and Apache opened the door and can lead to further development due to both lower cost and increased flexibility.

Mr. Burt also described the benefits of open flow, derived precisely because there is a clear process behind it that can be defined. The whole system can be managed on the web and somebody else can always carry out the later steps in the process. The three end users for this project were Catania (who, as the project started were fairly sceptical), the Scuole Superiore (who were obliged to follow Italian laws for public administrations), and COCOF (who at the beginning were at the vanguard in using OSS but by the end they were not so happy about its use).

Mr. Burt concluded that it could have also been interesting to look at how the internal workflow system works with definitions across various countries. One example he gave was the progress made in Germany, where you have the XML protocol and a well-defined designation of the process.

Many of the document management systems that were available were costly, complicated and had the capacity for lock-in. It was therefore necessary to think carefully about how the processes could be improved.

Alastair Burt

Questions and Answers from the floor

Mr. Mark Bressers, from the Dutch Competence Centre, asked how BerliOS was able to attract so many projects and what extra help were they given. Mr. Henckel responded that in general, interest was very high. Mr. Schnittger added that there is a conception in the public sector that you will introduce something and it will take care of itself. However, the question is really how to manage the collaboration and how the longer-term relationship can be sustained. This pointed to the central issue of sustainability of OSS.

Mr. Vemund Riiser asked Dr. Bruegger how the work in Grosseto had been facilitated. Dr. Bruegger responded that a very small department could actually make transition much more easily, as it is technical decisions that are being made, not political decisions. In Grosseto the project was undergone gradually and in phases, as there was no willingness to make a huge step because it would have been seen as too risky.

Mr. Bernhard Schnittger noted that a central question is whether open source can do everything that the public sector requires. Mr. Räsänen's presentation had suggested that there was a size limit to what could be developed. This leads to a second question concerning the core technologies that are not yet implemented in open source.

Mr. Brahim Souabi noted that open office is indeed an alternative but there are still elements missing. He noted, for example, the need for an open source 'Outlook'-type solution, particularly in terms of the joint agenda function.

Mr. Søren Roug added that there are four main areas where there are not yet viable replacements; the calendar system, the back-up system (as it is very difficult to get a reliable OSS system), firewall, and the graphical information system. EIONET has looked into OSS alternatives in these areas but have not yet found anything.