



Open Source in
Government
Here and Around the
World



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Overview



- Catalog of open source and open standards around the world
- Australia
- US
- Asiapac
- EU
- No comment
 - South America
 - India
 - South Africa
- Identify best practice, some issues

Australia (Federally)



- AGIMO: has established OSS reference site, including some explanations of open source, references to case studies and papers (Aug 04).
- June 03 Govt Interoperability Framework
- Guide to Open Source Software for Australian Government Agencies – break lock in
- National Archives use OO.o formats for document storage
- Dept of Veterans Affairs – Open source office tender December 04
- Centrelink – 450 servers to Linux hope to save \$17M
- AGIMO/Squiz?

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National Archives

[http://www.computerworld.com.au/index.php?id=1991153367
&fp=16&fpid=0](http://www.computerworld.com.au/index.php?id=1991153367&fp=16&fpid=0)

NSW: Policy



- 2002 Open Source Project initiated
- Special Minister for State Della Bosca
 - Feb 2003 Labor Conference will use “policy and administrative bulldozer” to “level the playing field” for adopting open source in NSW Govt
 - 26 October 2004: “[OSS] has been found to encourage the development of local information technology organisations, particularly small and medium-size enterprises providing software support and other services”
 - 6 April 2005: Open Source Software panel

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Report on Labor Conference
The Australian: Action Course on Open Source
http://linuxtoday.com/it_management/2004020300526OSLLPB

"NSW commerce and IT minister John Della Bosca will use a policy and administrative bulldozer, rather than legislation, to create a 'level playing field' for adopting open source software within his government.

"In any government tender process where an evaluation of an open source versus proprietary solution produced 'roughly the same' results, better industry development returns to the state dictated the business should go the open source package, he said.

COMMERCE OPEN SOURCE SOFTWARE Dr Chesterfield-Evans asked the Special Minister of State, Minister for Commerce, Minister for Industrial Relations, Assistant Treasurer, and Minister for the Central Coast What is the progress of the inquiry into the use of open source software by the Government, suggested at the 2003 NSW Labor Party Conference? Answer The Open Source Project was initiated in 2002 to determine the type of support agencies require to make best use of open source software. The aim was to widen the choice of alternatives for agencies purchasing software and increase opportunities for knowledge transfer between agencies. Through the project, a template for calculating the total cost of ownership of software has been developed. The template is currently being tested by different agencies and feedback will be incorporated into the final release. This template is being made available to all agencies, free of charge, to use in comparing relative costs of software solutions. Open source software is already widely used in the New South Wales Government, especially for internet applications. The Department of Commerce is developing a list of Open Source Products and Services in New South Wales. This list of products and services and other resources will be continually maintained through an open source Intranet, which is currently being built by the department to allow agencies to share information between agencies more easily. Project members will be regularly meeting during 2004.

Announcement in Parliament 2005

<http://www.parliament.nsw.gov.au/cgi-bin/isys/isyswebext.exe?op=get&uri=/isysquery/irl98f/6/doc/#hit1>

NSW Generally



- JIRS – judicial research system
- Education and Training “*The question of open-source ... is being seriously considered ...*” (Sept 04)
- Open Source Software Project
- Website www.opensource.nsw.gov.au
- NSW Interoperability framework (lists OOo formats) July 2002

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Courts measure justice with Linux

<http://www.computerworld.com.au/index.php/id%3b631120522%3bfp%3b16%3bfpid%3b0>

Legal professionals in NSW will soon access NSW court reference material via the new Judicial Information Research System (JIRS) application developed entirely in-house with Linux and open source technologies.

<http://www.judcom.nsw.gov.au/sentencing/jirs.php>

JIRS ensures that the courts are kept up to date with the latest developments in law and practice. The primary legal reference material contained on JIRS includes the full text of judgments from the NSW Court of Criminal Appeal, Supreme Court, Court of Appeal, Land and Environment Court, and Industrial Relations Commission, as well as selected High Court cases. It also includes the full text of New South Wales and Commonwealth Acts and Regulations.

GENERAL PURPOSE STANDING COMMITTEE NO. 1 15 September 2004

[Page 25 of 36]

The Hon. Dr ARTHUR CHESTERFIELD-EVANS: Has the department made any assessment of Linux open-source software to lessen software costs?

Mr CAPPIE-WOOD: The question of open-source versus proprietary software licensing is being seriously considered by large and small agencies. Linux is one supplier. The process involved in open-source software is not yet fully developed for a large organisation such as ours. We are watching the market extremely closely because obviously software costs are a considerable factor. We will continue to monitor the development of open-source software arrangements in the months and years ahead.

Interoperability framework: <http://www.oict.nsw.gov.au/content/5.5.36.interoperability.asp>

RTA



- Apache servers in registries
- Star Office, Mozilla (browser, email), Sun One
- 1500 Registry desktops – registries, potentially another 1,500 to come
- Lower virus load
- No substantial problems with document formats
- Saving of 20% of annual costs
- “MS is far more attentive to us”

WA



- Electronic Government Interoperability Framework (e-GIF),
- Opensource WA web site (www.opensource.wa.gov.au)
- Open source demonstration centre

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WA: <http://www.opensource.wa.gov.au/>

http://www.egov.dpc.wa.gov.au/docs/e-gif_technical_standardsV0-4August.pdf

4.2.10: DOCUMENT FILE TYPES " Recommended formats for editable documents are: Plain Formatted text (.txt) Rich Text Format (.rtf) Hypertext documents (HTML 4.01) Extensible Markup Language (XML) Microsoft Word (.doc) 97 format

"It is acknowledged that Microsoft Word is a proprietary document format.

Consideration will be given to open standards based format (XML based) in future versions of the e-GIF"

Australia (other)



- ACT: requirement to consider open source in procurement, as far as practicable avoid procuring software that does not comply with open standards
- Qld Dept of Transport
- Qld: Cairns City Council save 75% on software, hardware and support
- Vic, NT, SA, Tas (Avi?): ???

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ACT: Government Procurement (Principles) Guideline Act

Queensland Transport surveys road to Linux (Feb 05)

<http://www.computerworld.com.au/index.php/id;1673377782;fp;16;fpid;0>

In an effort to consolidate its server architectures and platforms, Queensland Transport will evaluate migrating some 300 NetWare, Solaris, and Windows systems over to Linux, according to the department's IT innovation and planning unit leader Sam Higgins.

Cairns City Council

<http://www.oracle.com/customers/profiles/PROFILE11456.HTML>

Key Benefits

- Improved reliability and performance with clustering
- Reduced support and maintenance costs by 75%
- Greater functionality of applications functionality improved communication for council staff and citizens

US



- Federal level: open source agnostic
- Technical Reference Model v1.1
- Mark Foreman OMB (Aug 03): no 5 year plan for particular technology, Linux gaining market share in mid tier servers within Govt
- Legislative initiatives/policy: California, Oklahoma, Oregon, Rhode Island, and Texas
- May have constitutional restraints on investing software (eg MA)

Core.Gov



- Federal Govt has copyright issues
- Despite status of federally funded software, not much historically distributed
<https://www.core.gov/>
- Facilitate pooling of Federal software development activity
- Promote reuse of code components.

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What are CORE.GOV's goals?

- * To improve interagency collaboration on component-based development.
- * To improve efficiency of development of component-based applications.
- * To support e-Gov initiatives.
- * To be user-friendly, efficient and effective.
- * To promote stakeholder participation.
- * To support OMB mandates for FEA development.
- * To refine and manage the component lifecycle process.

What are CORE.GOV's capabilities?

- * Allows for rapid discovery and assembly of technology and service components.
- * Accessible over a secure extranet where users have varying levels of access.
- * Provides components that have been tested, approved and certified for reuse and enhancement.
- * Enables approved users to easily find, evaluate, share and download components.
- * Enables collaborations with others on component development.
- * Allows users to enhance downloaded components to meet their specific needs.
- * Provides a user-friendly Internet interface for searching for and finding a wide variety of business process and technical components.
- * Leverages tools and saves money.
- * Provides an easy-to-use cataloguing system (e.g., componentname.core.gov).
- * Consolidated entry point.

How is CORE.GOV managed?

CORE.GOV uses CollabNet's SourceCast tool, which provides the following capabilities:

- * Integrates applications for software development, knowledge management and project communication.
- * Controls access through a Web-based project workspace with a centralized, role-based permissions model.
- * Enables secure and cost-effective development across multiple agencies.

Government Open Code Collaborative



- Sign GOCC Agreement on Code Access and Withdrawal for access
- May contain both open and closed licences
- Public area a bit sparse
- US State Governments/Municipalities only
ATM

California



- 2002 Digital Software Security Bill
- SO10 of California Performance Review
August 04

"the state should more extensively consider use of open source software, which can in many cases provide the same functionality as closed source software at a much lower total cost of ownership."

- **LA City Council**
 - "For taxpayers, this is a no-brainer, said Councilmember Eric Garcetti ... Free open source software can be as capable and more secure than products that cost the city millions."

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DSSB

If enacted as written, state agencies would be able to buy software only from companies that do not place restrictions on use or access to source code. The agencies would also be given the freedom to "make and distribute copies of the software."

<http://news.com.com/2100-1001-949241.html>

SO10 Summary:

<http://cpr.ca.gov/report/cprprt/issrec/stops/it/so10.htm>

LA City Council

February 2005

<http://www.fcw.com/fcw/articles/2005/0207/news-la-02-07-05.asp>

http://www.lacity.org/council/cd13/cd13press/cd13cd13press13227121_02022005.pdf

Massachusetts



- Jan 04 – Enterprise Open Standards Policy
- Mar 05 Microsoft agrees to vary XML licences in order to qualify for MA procurement
- New draft Enterprise Technical Reference Model currently under review (comments closed 1 April 05) strong focus on standards compliance and interoperability

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Enterprise Open Standards Policy

All prospective IT investments will comply with open standards referenced in the current version of the Enterprise Technology Reference Model.

http://www.mass.gov/portal/index.jsp?pageID=itdterminal&L=3&L0=Home&L1=Policies%2c+Standards+%26+Legal&L2=Open+Standards&sid=Aitd&b=terminalcontent&f=_policies_standards_open_standards_policy&csid=Aitd

Draft model retains this policy

Microsoft varying XML refs:

<http://www.groklaw.net/article.php?story=2005011807275883>

<http://www.groklaw.net/article.php?story=2005011418070774>

Texas



- 2001/2003: Microsoft “persuades” City of Austin, Justice Department into Enterprise Agreements (could not prove all licences) <http://www.linuxworld.com/story/32651.htm>
- July 2004: Standards Review and Recommendations Publications (SRRPUB)
- Recommends storage of data in open formats, consideration of open source.

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About SRRPUB:

The Department of Information Resources (DIR) issues Standards Review and Recommendations Publications (SRRPUB) as guidelines for Texas state agencies and institutions of higher education.

Recommendations:

1. Agencies should consider OSS solutions in IT procurements.
2. The criteria for selecting a specific solution should be based on best value.
3. Agencies should use products that support open standards and specifications in all applications.
4. Agencies should consider obtaining full rights to software code it procures wherever this achieves best value. Draft of sample language to use in an RFO.
5. Agencies should consider joining the GOCC (<http://www.gocc.gov>).
<http://www.dir.state.tx.us/standards/srrpub09.htm>

Sample RFO clauses: <http://www.dir.state.tx.us/standards/srrpub09-rfo.htm>

SE Asia



- Japan, China, South Korea met to develop their own Linux for June 05 Release
- India
- Vietnam
- NZ: DHB announced OOo trial Hope to save \$20 million in licences.
- Thailand
- Singapore – 5,000 desktops today, 20,000 by Q2 2006
- People's computer initiatives in Thailand, Malaysia, Indonesia. Soon after price of Windows XP + Office comes down by roughly 85%

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Linux in SE Asia

<http://news.zdnet.co.uk/software/linuxunix/0,39020390,39171012,00.htm>

Asian open-source standard eyes June release

http://www.koreaherald.co.kr/SITE/data/html_dir/2005/01/05/200501050019.asp

With the open-source movement gaining momentum regionally, software developers from Korea, Japan and China said they are nearing the completion of a compatible open-source operating system that will be promoted as an Asian standard.

India

IT Powerhouse Strikes Back

<http://www.ipsnews.net/africa/interna.asp?idnews=27191>

Anyone who doubts the power of Linux needs only to get hold of a nifty, hand-held device that the Indian army plans to issue to soldiers in its million strong army.

[VietNam] More investment set to develop open source software in 2003-07 period

http://www.vnagency.com.vn/NewsA.asp?LANGUAGE_ID=2&CATEGORY_ID=32&NEWS_ID=45414

A total of 312 billion VND (20 million USD) will be injected into the application and development of open source software in Viet Nam covering the 2003-07 period.

Thailand promotes open source (Feb 05)

<http://news.zdnet.co.uk/software/linuxunix/0,39020390,39187561,00.htm>

The Thai Software Industry Promotion Agency (SIPA) wants to encourage governments and organisations to start using open source software for server communication applications and for desktop office productivity applications, and to migrate to other applications later, the Bangkok Post reported on Wednesday.

Malaysia



- Malaysian Administrative Modernisation and Management Planning Unit (MAMPU)
- Open source procurement preference
- Malaysian Public Sector Open Source Software Initiative
- Master Plan
- Open Source Competency Centres



EU



- IDABC <http://europa.eu.int/idabc/>
- Includes Open Source Observatory
<http://europa.eu.int/idabc/en/chapter/452>
- News, case studies, FAQs, resources
- Established EU OSS competence centres:
<http://europa.eu.int/idabc/en/document/1631/471>
- Migration Guidelines with costing models:
<http://europa.eu.int/idabc/en/document/1631/471>
- Pooling of open source feasibility study

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IDABC stands for Interoperable Delivery of European eGovernment Services to public Administrations, Businesses and Citizens.
<http://europa.eu.int/idabc/>

Austria
The Austrian Information and Communication Technologies strategy (DE)

Denmark
The Danish software strategy (DA)

Finland
Working Paper on the use of open source methods in the development of tailored applications for State administration by the Public Management Department of the Finnish Ministry of Finance (EN)

Linux in Government: White Paper (February 2002)

France
An ADAE (Ageance pour le Developpement de l'Administration Electronique) guide to the choice of software for administrations (FR)

Germany
Open Source for the Federal Administration (DE)

Migration Guide: A guide to migrating the basic software components on server and workstation computers by the Federal Ministry of Interior (July 2003) (EN)

Italy
Italian Government Guidelines for the Development of the Information Society in the Legislation (IT)
Presentation (IT)
Download the PDF version of the document (IT)

Norway
Report of Statskonsult on the assessment of Linux and other open-source suitability (August 2001) (EN)

The Netherlands
The Dutch website of the OSOSS - Programme Open Standards and Open Source Software for the Government (NL).

Slovenia
'The Policy of the Government of the Republic of Slovenia on development, implementation and usage of open source software code and solutions based on open source' October 2003, EN (PDF version). The official website of the Slovenian Ministry of Information Society.

United Kingdom
Government policy, guidance and case study documentation on the use of Open Source Software within the UK government (EN).

EU(UK)



- OGC OSS Policy
 - UK to consider OSS solutions
 - Only use open standards and specifications
 - Avoid lock in
 - Explore OSS as default IP exploitation route for Govt funded R&D
- Guidance Document to implementing OSS
- QnitIQ report on OSS in UK Gov.
- OGC report (Oct 04): “open-source software is now a genuine competitor to Microsoft in the public sector”

EU (UK)



- Office of E-Envoy
- APLAWS project: Local Council Open Source CMS – 30 councils adopted so far
- Bristol CC: 5,000 users to SO, save £1.4M over 3 years (600 user pilot already complete)
- NHS – PACS OSS project. Saved €4.7million 1st year, expect further €8.3 million over next 5 years.
- NHS 5,000 seats JDS

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APLAWS

<http://www.aplaws.org.uk/home/index.php>

During 2001/2 the Office of the Deputy Prime Minister funded the APLAWS Pathfinder Project to develop web standards and an Open Source Web Content Management System that could be freely adopted by any local authority in the UK. Following the massive interest in the Pathfinder, the APLAWS Project was taken forward as part of the Officer of the Prime Minister's National Projects programme and became the foundation of the Content Management Strand of the Local Authority Websites National Project over the period April 2003 - March 2004.

Apart from the financial and specific support provided by these two central government funded projects, the APLAWS concept has moved forward on its own momentum. There is an established user group which has already made considerable strides in taking the product set forward. Like any Open Source project, the sustainability of these products will evolve as the user group continues to grow

Open source gets thumbs-up - new government report

<http://management.silicon.com/government/0,39024677,39125359,00.htm>

<http://www.ogc.gov.uk/index.asp?docid=2190#finalreport>

The UK government seems to be warming to open source. Today, the Office of Government Commerce (OGC) published a report saying open-source software is now a genuine competitor to Microsoft in the public sector.

Bristol City Council spurns Microsoft for Star Office

<http://www.computerweekly.com/articles/article.asp?liArticleID=135099&liArticleTypeID=1&liCategoryID=1&liChannelID=1&liFlavourID=1&sSearch=&nPage=1>

Bristol City Council expects to save £1.4m over the next five years by switching to StarOffice desktop applications.

NHS

<http://www.e-health-insider.com/news/item.cfm?ID=909>

In the case study, 'Open Source Software can Improve the Health of the Bank Balance – the Beaumont Hospital Experience', by Brian Fitzgerald and Tony Kenny, the hospital is cited as saving €13m (£9m) on comparable software over five years by switching to open source, with the biggest savings being made on e-mail systems and the picture archiving and communications system (PACS).

EU (Other)



- Germany – Migration Guidelines
- Germany (Munich) – 14,000 OO desktops
- Vienna up to 7,500 OO desktops (+4,800 on Linux)
- Bergen (Norway) – 100 Schools, City admin: 30% hardware, 50% licence saving
- Holland: Haarlem – 2,000 desktops, saving €600K *after* migration costs accounted for
- Geneva: Entire Canton admin to move to Linux by 2009

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Germany (March 05)

Just in time for CeBIT, Germany's Ministry of the Interior (BMI) has published an expanded edition of its Migrationsleitfadens (Migration Guidelines).

<http://www.heise.de/english/newsticker/news/57277>

Vienna to softly embrace Linux

<http://news.zdnet.co.uk/software/linuxunix/0,39020390,39185440,00.htm>

See also:

<http://comment.zdnet.co.uk/other/0,39020682,39185491,00.htm>

<http://www.heise.de/english/newsticker/news/55470>

Open source has won another convert in the local government sector, with soft migrations to Linux imminent across Vienna's municipal authority

Bergen

<http://news.zdnet.co.uk/software/linuxunix/0,39020390,39173557,00.htm>

Geneva

http://linuxtoday.com/it_management/2004111902426NWDPPB

"We want to guarantee our software independence," explains Jean-Marie Leclerc, general manager of the State Center of Information Technologies. "This is not directed against Microsoft; it is simply a question of not depending more on only one company. Also, one cannot imagine an open administration without adopting open systems!"

France



- Projet ADELE
- Requires open standards
- General Directorate de la Comptabilite Publique – 200 servers
- General Directorate of Taxes - 500 Servers
- France: Police force – 35,000 OO.o by Jan 05, 80,000 by end of August – save €2M
- France: Dept of Equipment – 1,500 desktops
- General Directorate of Customs – migration of 16,000 desktops to OO.o due end 2005
- Ministry of Interior – 30,000 OO.o desktops installed
- OO.o default document format from January 2005

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French police to switch to OpenOffice
<http://www.heise.de/english/newsticker/news/55253>

The French police are planning to switch from Microsoft Office to OpenOffice, the French industry news service Toolinux reports. By the end of January some 35,000 PCs and workstations are to be equipped with the open source office suite; by this summer the number is to reach 80,000. The French police expect to be able to cut costs amounting to more than two million euros by this move.

Strategic Uses



- French Ministry of Foreign Affairs and Mandrakesoft launch Open Source solution for Internet in Africa

<http://linuxpr.com/releases/7249.html>

- French Ministry of defence funds security hardening of Mandrake Linux

Best practice



- Adopt interoperability framework
- Repositories to facilitate code exchange
- Key component is Open Standards and Document Formats (NB: excludes intra vendor “interoperability”!)
- Value for money comparison, including on licence terms
- Active Open Source Procurement Policy
- Create knowledge infrastructure for OSS
- Use OSS to support domestic SMEs
- EU/Asia – more proactive

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Strategic Uses



- Domestic development: SE Asia, EU hoping to use OSS to leapfrog channel bottlenecks, technology monopolies
- Create localised versions to support local SMEs
- Outward facing initiatives
- Creates enormous bargaining power/leverage with existing vendors

Issues



- Defining interoperability – purpose is to create vendor independence, so “interoperability” within (or one way towards) vendor product set can be worse than worthless
- How to factor licence terms into value equation
- HR issues
- Lack of familiarity

Pitfalls



- Readable, writeable, but not develop-able
- Submarine patents
- Interoperable a market characteristic, not a software or data characteristic – otherwise have definitional fights about who determines standards
- Best way to achieve interoperability is procurement requirement for documented and open formats and protocols then let market work it out

OSIA Party Survey



- Parties Survey
- Oct 04,
- 4 Major parties
- Series of questions relating to document formats and open source

Summary Responses



- OSS has important role in national economy
- Should require Gov. data to be stored in competitive data formats
- Gov. web data should be W3C compliant
- All parties have OSS policy (Greens a draft)
- Encourage lowering barriers to entry in s/ware market
- Supports recognition and use of competitive formats for interchange of data with Gov.
- Oppose spurious patents hampering innovation

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Does your party consider that open source has an important role to play in the national economy?

One of the main barriers to competition experienced by open source enterprises is the inability to access existing data because of the use of anti-competitive data formats. By this I mean that there are restrictions on the implementation of procedures to read or write data in that format. I note in this respect that a number of industry standard formats are neither open nor competitive.

2. Does your party support reducing barriers to competition in the software market by requiring the storage of Government data in competitive data formats where practicable?

3. Does your party support the presentation of Government data on the internet in a form compliant with the standards set out by the World Wide Web Consortium (W3C)?

4. Would you also please let me know whether or not your party:

- has any policy in relation to open source? (If so, please provide me with a copy.)
- supports the lowering of barriers to entry in the market for software within Australia?
- supports the recognition and use of open and competitive data formats for the exchange of information between Government Agencies and citizens and business?
- supports preventing spurious patents from hampering software innovation.

Thank you



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