Trevor Lund

Al Clarke

English 250H

Annotative Bibliography

**Joel West, "Value Capture and Value Networks in Open Source Vendor Strategies," hicss, pp.176, 40th Annual Hawaii International Conference on System Sciences (HICSS'07), 2007**

Joel West, a professor at San Jose State University, analyzes the strategies of companies that back open source software (OSS). His paper is the result of a four-year study on the business models of these companies. He emphasizes capturing value and outlines exactly what a company can do to retain the value of their software. Mr. West uses a lot of jargon and factual reasoning to get his points across to the reader. As such, this article is extremely detailed and goes into great depth to the inner workings and reasoning behind the adoption of OSS. A large part of preventing software lock-in has to deal with OSS, so the plausibility behind making OSS mainstream is important.

**Liebowitz, S. J., Margolis, Stephen E. (1995). "Path dependence, lock-in and history". *Journal of Law, Economics, and Organization* 11: 205–226. <http://www.utdallas.edu/~liebowit/paths.html>.**

Liebowitz and Margolis are professors at the Universities of Texas at Dallas and North Carolina State, respectively. In their paper, they outline three distinct forms of path dependence. The first two forms are “path dependencies” that cannot change, but the third discusses the strategies that can be used to change paths, or break out of software lock-in, to put it in terms of my paper. The paper focuses on defining these three forms of path dependence for the first part, then begins to shift its focus towards why society chooses certain paths, giving excellent examples throughout the paper. This paper comes across with really solid theories explaining these choices and going into the history and significance of one of their examples, Betamax vs. VHS.

**Ven, K., Verelst, I., Mannaert, H., "Should You Adopt Open Source Software?," *Software, IEEE*, 25: 54-59, May-June 2008  
<http://ieeexplore.ieee.org/stamp/stamp.jsp?tp=&arnumber=4497765&isnumber=4497747>**

Ven, Verelst, and Mannaert all work at the department of Management Information Systems at the University of Antwerp as a PhD student, associate professor, and professor, respectively. Their informational article outlines the pros and cons of choosing OSS to support a company and why some companies have chosen or not chosen OSS. The article is written in pretty simple language, as the intended audience would be those company executives who might not necessarily know the details behind OSS. The authors include a section on software lock-in and what effect OSS would have on that lock-in and prices. They also include a table of claims and counterclaims about OSS, which ties in well to the simplicity factor for business people. The article doesn’t try to convince anyone to get OSS or otherwise, it just informs the reader about all aspects of their choice.

**Sharpe, Nicola F.; Arewa, Olufunmilayo B."Is Apple Playing Fair? Navigating the iPod FairPlay DRM Controversy". *Northwestern Journal of Technology and Intellectual Property* (Northwestern University) 5 (2).**  **(Spring 2007). Retrieved December 10, 2010. <http://www.law.northwestern.edu/journals/njtip/v5/n2/5/>.**

In this article, these two professors from Northwestern University analyze what happened with iTunes and Digital Rights Management (DRM). They take specific examples to show what is wrong with DRM and how Apple tried to create a monopoly on the music industry. They note how DRM might tie in with software lock-in and why each of them should be discouraged. Since this paper focuses exclusively on the controversy surrounding iTunes and the iPod, the authors are able to get extremely specific and provide a lot of information that would’ve otherwise bloated a paper.