

Respecting Open Source Licenses !

OSLiC & OSCAd

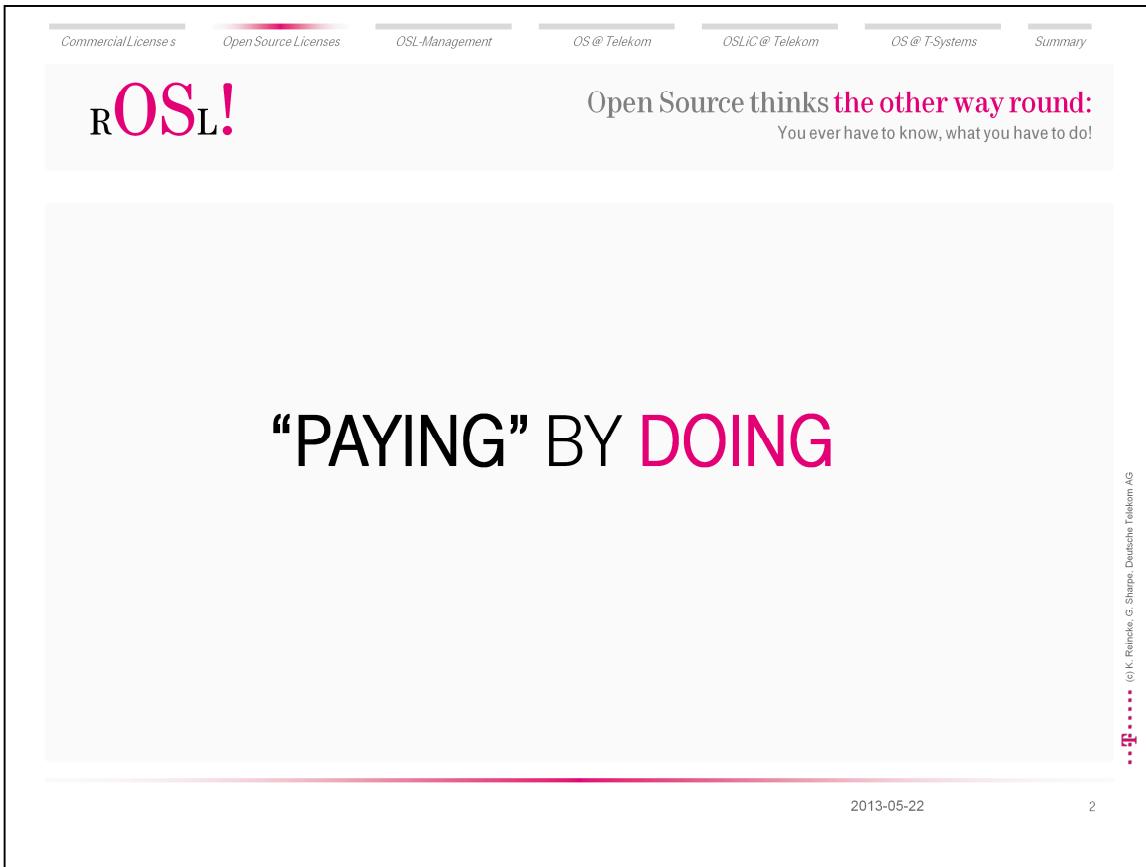
Das **Open Source License Compendium** & der **Open Source Compliance Advisor**
Freie Tools zur Vereinfachung der lizenziadäquaten Nutzung von Open Source Software

Open Source CompLianCe in Deutsche Telekom

Karsten Reincke, Greg Sharpe

Erleben, was verbindet.





The screenshot shows a presentation slide with the following elements:

- Navigation Tabs:** Commercial Licenses, Open Source Licenses, OSL-Management, OS @ Telekom, OSLiC @ Telekom, OS @ T-Systems, Summary.
- Title:** ROSL!
- Text:** Open Source thinks **the other way round:**
You ever have to know, what you have to do!
- Main Title:** “PAYING” BY DOING
- Footer:** 2013-05-22, 2, (c) K. Reincke, G. Sharpe, Deutsche Telekom AG

- Wir alle wissen: Das Recht, Open Source Software zu nutzen, kann man nicht kaufen. Das funktioniert anders. Man darf Open Source Software nur nutzen, verändern und (verändert) weitergeben, sofern man das tut, was die Lizenzen aktiv getan haben wollen. Auch das Management von Firmen muss verstehen: Open Source Software folgt dem Prinzip ‘Paying by Doing’.
- We all know: You can't buy the right to use open source software. The open source software thinks the other way round: you get the right to use, to modify and/or to redistribute the software by doing what is required by the open source licenses. Thus, the management of companies using open source software has to know: open source software follows the principle ,paying‘ by doing.

[Commercial Licenses](#) [Open Source Licenses](#) [OSL-Management](#) [OS @ Telekom](#) [OSLiC @ Telekom](#) [OS @ T-Systems](#) [Summary](#)

R^{OSL!}!

Open Source thinks **the other way round:**
Respect the rules and you are allowed ...

Open Source Licenses	Open Source Use Cases	Fulfilling Task Lists
69 (with respect to 2012-05-11) OSI certified	> 5 'use', 'modify', 'distribute', 'modify & distribute', 'embed' as	> 345 more or less similar lists of required actions as

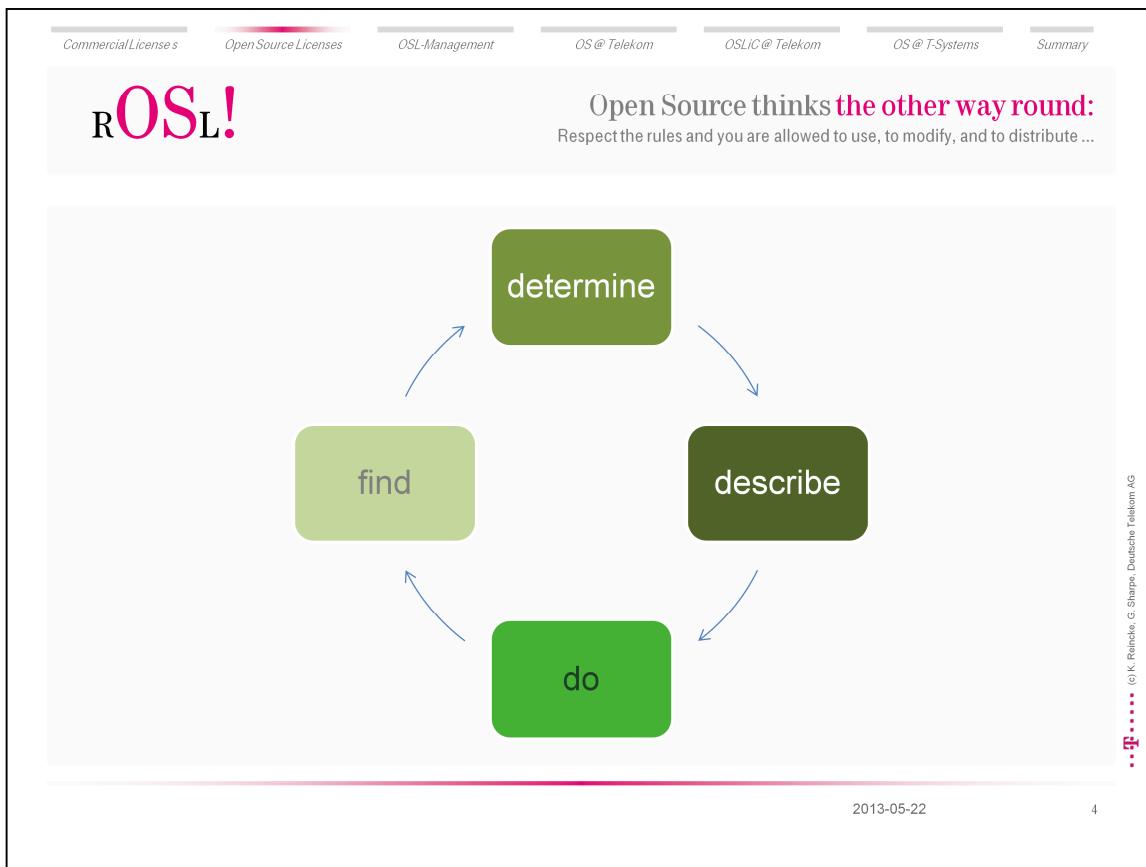
* <http://www.opensource.org/licenses/alphabetical>

2013-05-22

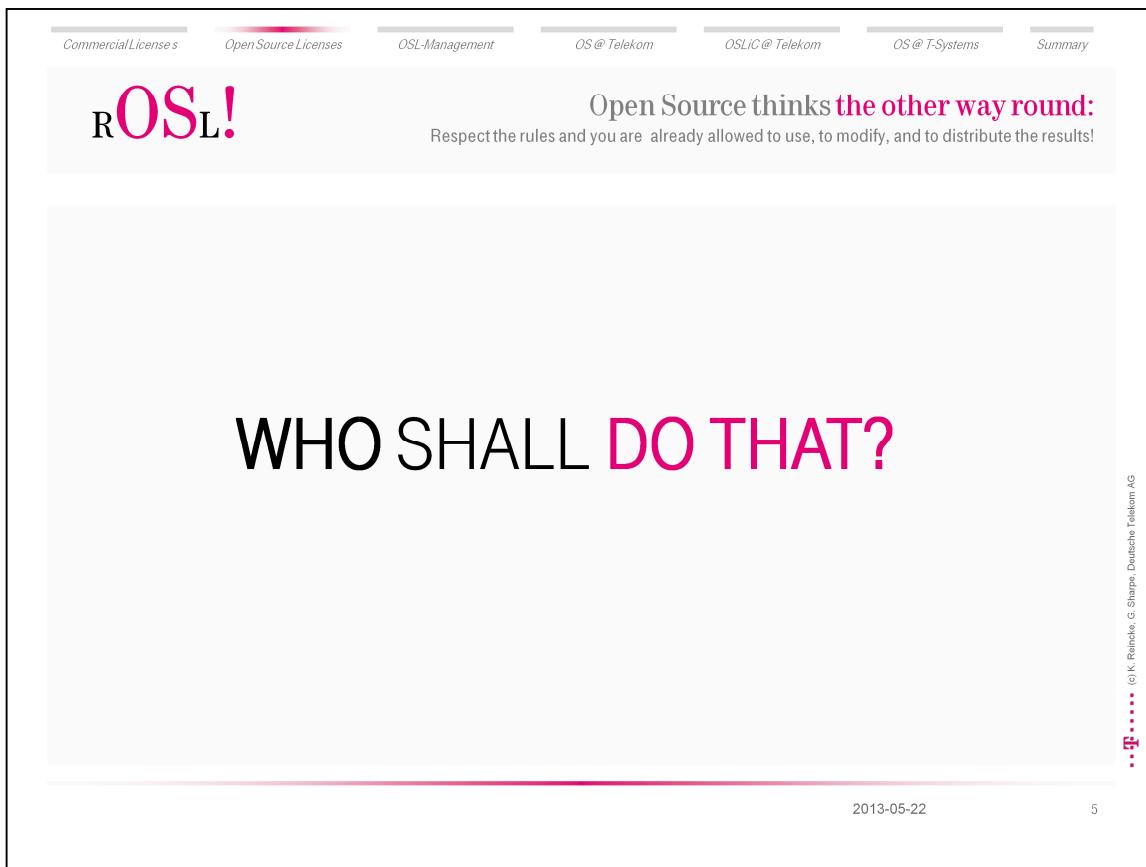
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- Das aber birgt eine spezifische Herausforderung: Es gibt so viele Open Source Lizenzen (69). Und die wollen alle unterschiedliche Forderungen erfüllt haben. Mehr noch: diese erfüllenden Aktivitäten betreffen verschiedene Kontexte (>5): Nutze ich die Software nur für mich selbst? Gebe ich sie an andere weiter? Habe ich sie verändert? - So kommt man leicht auf mehr als 345 von Lizenz erfüllenden Aufgabenlisten, die es zu managen gilt.
- But then there exists specific challenge: There are so many open source licenses (69) which require different fulfilling activities. And these fulfilling working steps must consider the different contexts (>5): do I only use the software for myself. Or do I hand over it to any other person? And have I modified it? Hence we get more than 345 possible fulfilling task lists.



- Darum wird ein verlässliches Open Source Lizenzmanagement anders arbeiten, als das traditionelle Lizenzmanagement:
 - finde alle verwendete Open Source Software
 - bestimme den Nutzungskontext
 - beschreibe die für den Nutzungskontext spezifischen notwendigen Lizenz erfüllenden Aktivitäten
 - setze die geforderten Aktivitäten um
- So, a reliable open source license management process is determined by other aspects than the traditional license management :
 - find all used / received open source software
 - determine the usage context
 - describe the necessary actions which must be executed for fulfilling the license in this context
 - do what has to be done for acting according the open source license



The screenshot shows a presentation slide with the following elements:

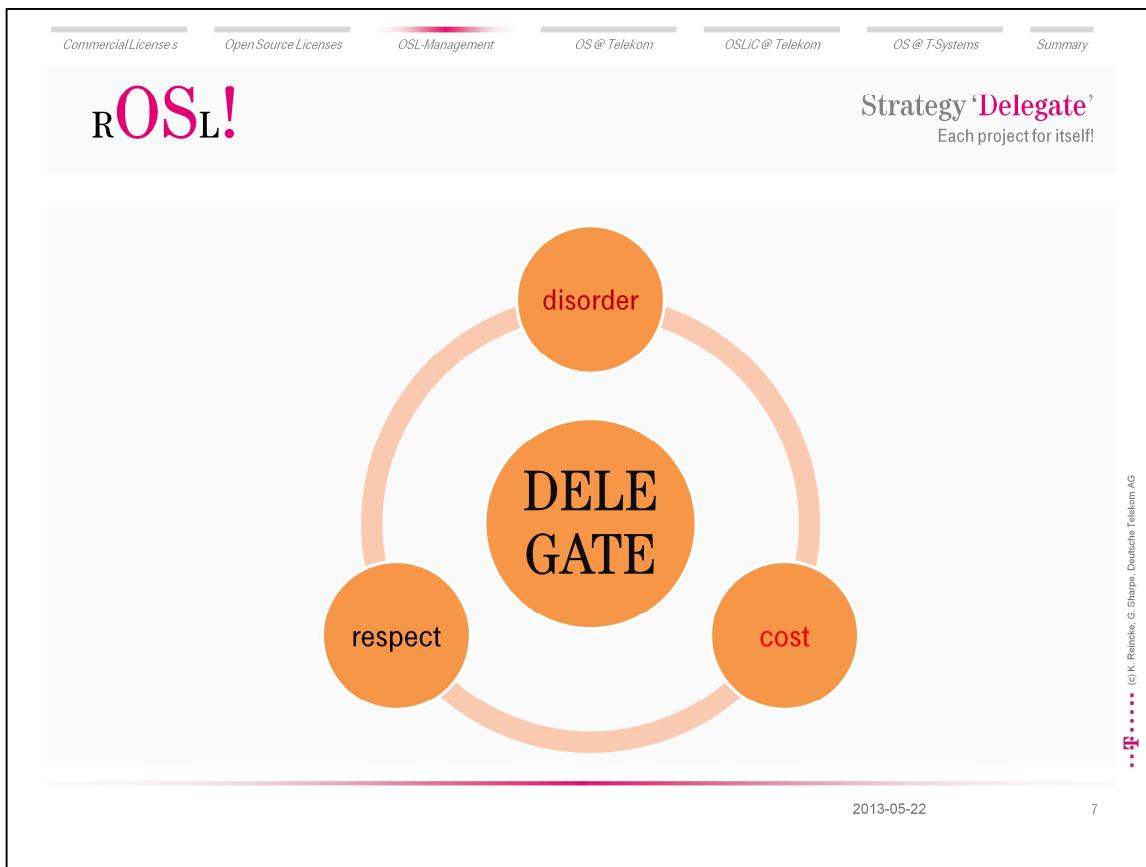
- Navigation Tabs:** Commercial Licenses, Open Source Licenses, OSL-Management, OS @ Telekom, OSLiC @ Telekom, OS @ T-Systems, Summary.
- Title:** ROSL!
- Text:** Open Source thinks **the other way round:**
Respect the rules and you are already allowed to use, to modify, and to distribute the results!
- Section Title:** WHO SHALL DO THAT?
- Footnote:** (c) K. Reincke, G. Sharpe, Deutsche Telekom AG
- Timestamp:** 2013-05-22
- Page Number:** 5

- Klare Frage also: Wer macht diesen Job? Wer garantiert die lizenzkonforme Verwendung?
- Für große Firmen ist das eine besondere Herausforderung: Je größer die Firma, desto mehr Open Source Software, desto umfangreicher diese Arbeit, desto größer die Kosten.
- Es gibt verschiedene Strategien, dieses Problem zu lösen:

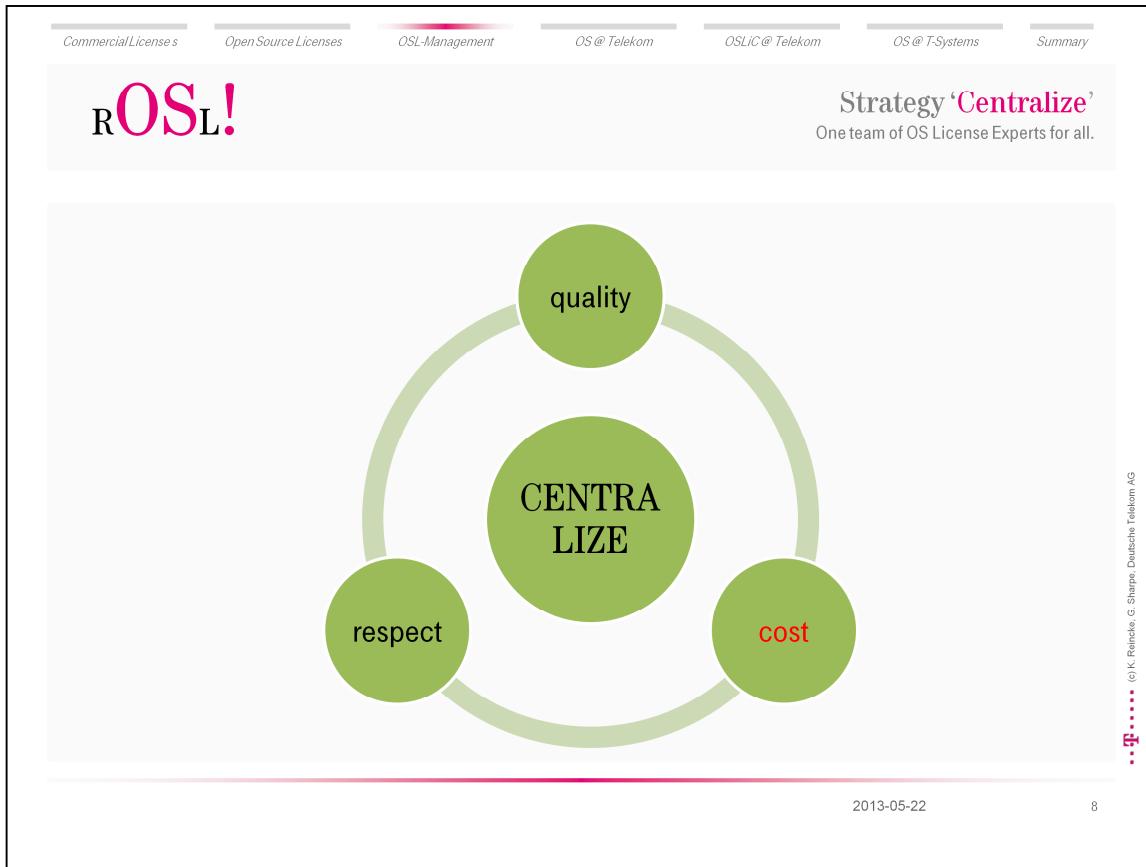
- So, the main question is: who shall execute this job of ensuring to act according the open source licenses?
- For large companies this concerns its charges: the larger the company, the more used open source software, the more work, the more cost
- There exist different strategies to solve this challenge:



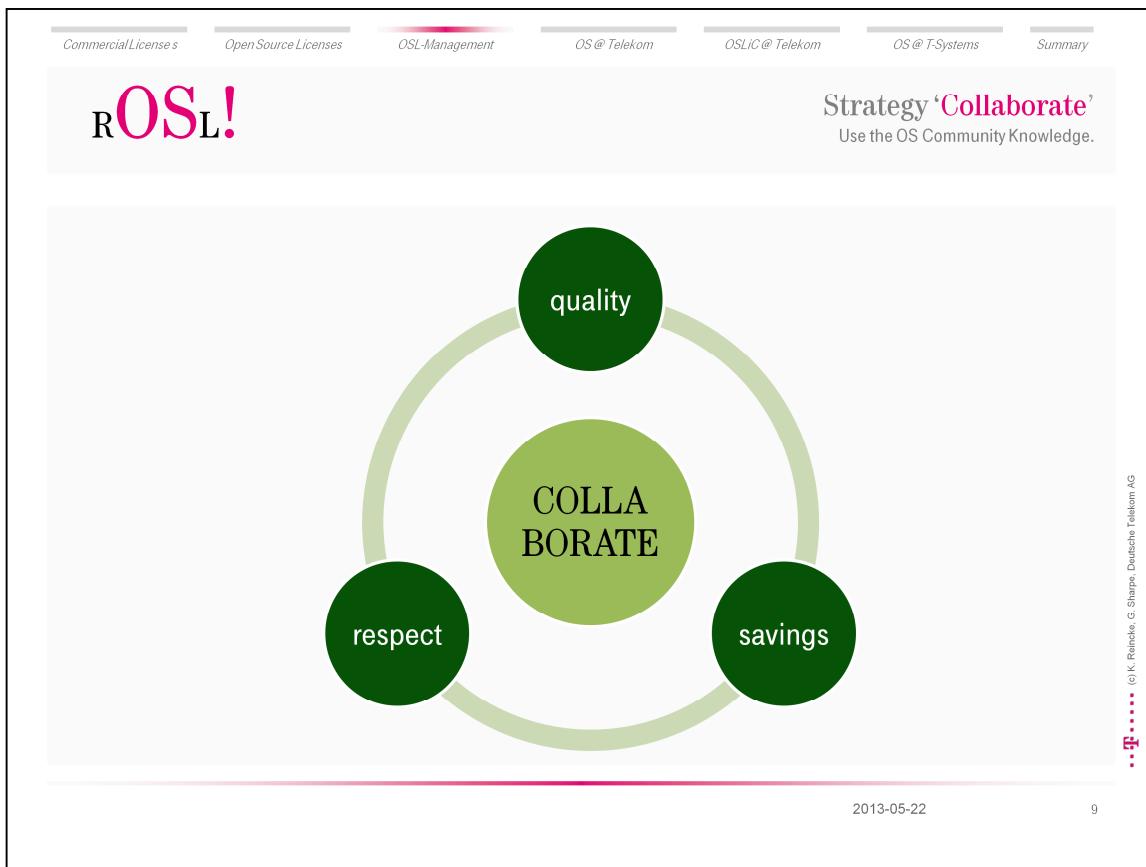
- Die erste Strategie besteht schlicht darin zu hoffen, dass schon irgend Softwareentwickler und Open Source Enthusiast diesen Job machen wird, auch ohne direkt dazu aufgefordert zu sein. Problem: Open Source Softwareentwickler lieben gute Software, nicht aber unbedingt die Lizenzlektüre.
- Insgesamt also ein schlechte Strategie – besonders für Firmen, die Lizenzen bewusst erfüllen wollen.
- The first strategy is to hope that anyone will do the job, even if nobody explicitly requires that this job must be done.
- Of course, it is a bad strategy – namely for companies who love to act compliantly.



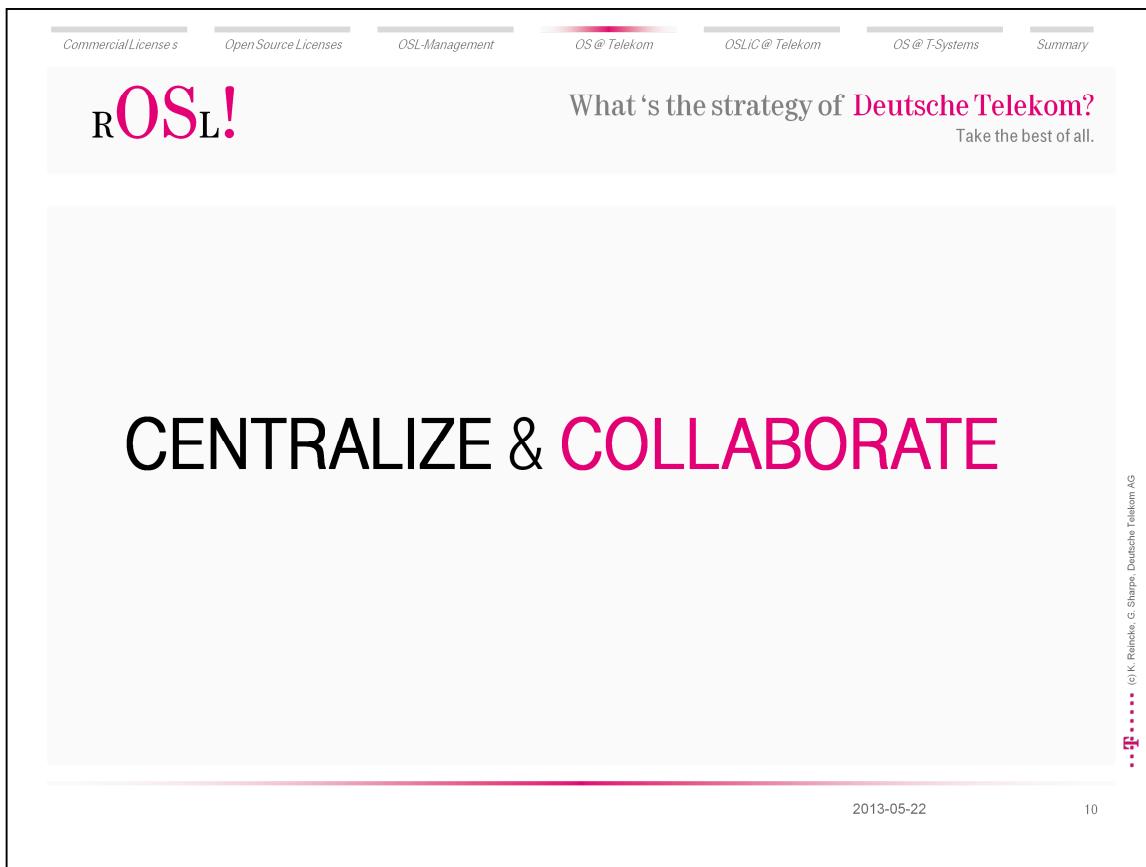
- Die zwei Strategie besteht darin, den Job an jedes einzelnen Softwareprojekt zu delegieren.
- Diese Strategie ist besser – aber immer noch sehr teuer: jedes Projekt muss sich seinen Lizenzexperten „heranzüchten“.
- The second strategy is to delegate the job to each (software) project of a company.
- It's a better strategy – but still very expensive: each project must get / train its own license expert.



- Eine gute Strategie ist die Zentralisierung des Lizenzwissens in einem Expertenteam, das die Arbeit als einen übergreifenden Service für alle Projekte anbietet.
 - A good strategy is to form an internal central team of license experts which serve all request of all projects.



- Die beste Strategie aber ist die Kooperation mit der Community. Denn dort draußen ist das Lizenzwissen noch größer.
- The best strategy is to cooperate with the open source communities: the power is in the swarm



The screenshot shows a presentation slide with the following elements:

- Navigation Tabs:** Commercial Licenses, Open Source Licenses, OSL-Management, OS @ Telekom, OSLiC @ Telekom, OS @ T-Systems, Summary.
- Title:** R OS L!
- Text:** What 's the strategy of Deutsche Telekom?
Take the best of all.
- Main Title:** CENTRALIZE & COLLABORATE
- Footnote:** (c) K. Reincke, G. Sharpe, Deutsche Telekom AG
- Timestamp:** 2013-05-22
- Page Number:** 10

- Die Strategie der Deutschen Telekom ist die Mischung aus Zentralisierung und Kollaboration.
- The strategy of Deutsche Telekom AG?
- No doubt, we want to act according the open source licenses – even if we are a very large company.
- So we use a mixture of strategy no 3 (centralization) and no 4 (collaboration)

Commercial Licenses Open Source Licenses OSL-Management OS @ Telekom OSLiC @ Telekom OS @ T-Systems Summary

R^{OSL!}

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

the
Telekom
internal
**Open
Source
Review
Board**
process

The diagram illustrates the 6 steps of handling an open source license support request:

- Step 1: Support Request** (anyone)
- Step 2: Sponsor Selection** (OSRB)
- Step 3: Sponsor Analysis** (sponsor)
- Step 4: Open Discussion** (experts)
- Step 5: Final Discussion** (OSRB)
- Step 6: Solution Transfer** (sponsor)

Annotations along the process:

- Informal Support Request** (upward arrow at the start)
- fast** (horizontal bar below the steps)
- Preliminary Solution Statement** (downward arrow at the end of Step 3)
- Case-Analysis documented** (upward arrow from Step 4)
- thoroughly** (horizontal bar below the steps)
- Solution documented** (upward arrow from Step 5)
- Final Solution Statement** (downward arrow at the end of Step 6)

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- Dazu hat die DTAG ein Expertenteam aufgesetzt, das intern als das Telekom Open Source Review Board auftritt und einem bestimmten Prozess nach arbeitet.
- Firstly we established indeed a team of experts, internally known as the Telekom Open Source Review Board, which acts according to this process: any one in the company can ask any one on the board a question. The board determines a sponsor for the request which firstly and very quickly analyzes and describes the case and gives a first preliminary solution statement. Then this statement is discussed and finally closed by the OSRB as whole.

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R0SL!

Centralize and know that pareto will strike back!
The same work must be repeated to often.

80 % of the requests are manageable by

20 % standard answers!

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- Allerdings: Pareto ist überall. 80 % der Anfragen können mit 20% Standardantworten 'abgearbeitet' werden.
- But one has to know, that the simple cases repeat again and again and hence must be handled again and again

The slide features a navigation bar at the top with tabs: Commercial Licenses, Open Source Licenses, OSL-Management, OS @ Telekom, OSLiC @ Telekom, OS @ T-Systems, and Summary. Below the navigation bar, the title 'R^{OSL!}!' is displayed in large pink letters. To the right of the title, the text 'Centralize, but allow the internal delegation ...' is followed by 'Nevertheless!' in smaller text. The main content area contains the text 'Simplify your life: enable the employees – but ...' in large pink font. On the right side of the slide, there is a vertical footer with the text '(c) K. Reincke, G. Sharpe, Deutsche Telekom AG' and a small red decorative graphic.

Commercial Licenses Open Source Licenses OSL-Management OS @ Telekom OSLiC @ Telekom OS @ T-Systems Summary

R^{OSL!}!

Centralize, but allow the internal delegation ...
Nevertheless!

Simplify your life:
enable the employees – but ...

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- Also ist es dann doch wieder besser, die Projektmitarbeiter selbst in die Lage zu versetzen, die Antworten zu finden - allerdings ...
- So: It's better to enable the employees themselves to answer at least the simple questions

Commercial Licenses Open Source Licenses OSL-Management OS @ Telekom OSLiC @ Telekom OS @ T-Systems Summary

R^{OSL!}!

Centralize, but allow the internal delegation ...
if it's supported by a simple tool!

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

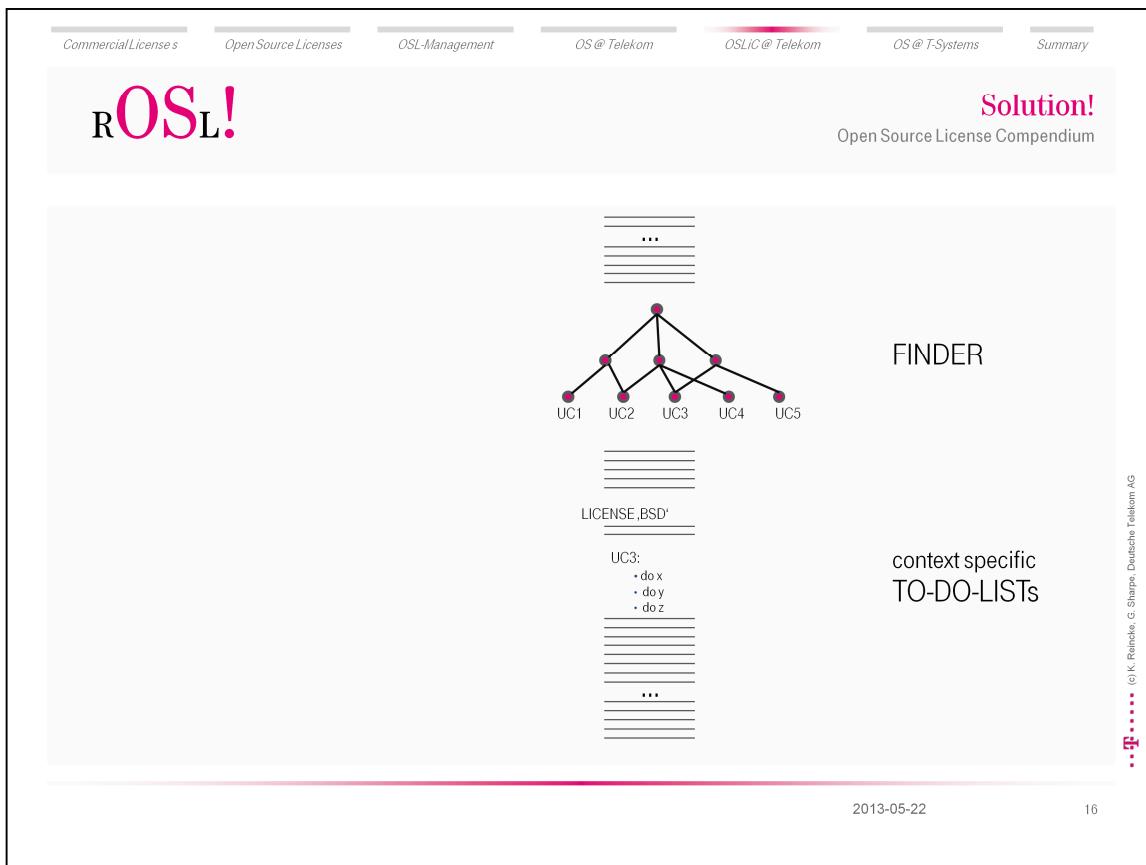
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- ... ohne Qualitätsverluste, ohne Zusatzkosten, und ohne Störungen zu verursachen.
- ... but without being disruptive, losing quality, or generating extra cost:

The slide features a navigation bar at the top with the following items: Commercial Licenses, Open Source Licenses, OSL-Management, OS @ Telekom, OSLiC @ Telekom, OS @ T-Systems, and Summary. Below the navigation bar, the title 'R^{OSL!}' is displayed in large, bold, pink letters. To the right of the title, the word 'Solution?' is written in red, followed by 'Open Source License Compendium' in smaller text. The main content area contains the text: 'The only thing we need is an easily to use Open Source License Compendium'. On the far right edge of the slide, there is a vertical red dotted line with the text '(c) K. Reincke, G. Sharpe, Deutsche Telekom AG' above it. At the bottom of the slide, the date '2013-05-22' and the page number '15' are located.

- Die Lösung bestünde in einem Open Source Lizenzen Handbuch ...
- The solution would be an Open Source License Compendium ...



- Solche ein Kompendium sollte
 - a) einen einfach zu nutzen Finder bieten
 - b) der zu jeder Open Source Lizenz und zu jedem Nutzungskontext TO-DO Listen liefert, die man blos abarbeiten müsste, um sicher zu sein, dass man sich lizenzkonform verhält.
- Such a compendium will only be usable by developers if
 - a) they got a simply organized finder leading to the relevant use case
 - b) for each license and each use case the compendium offers a to-do-list by which the users can be sure to act according to the open source license.

The screenshot shows a presentation slide with a light gray background. At the top, there is a navigation bar with several tabs: 'Commercial Licenses', 'Open Source Licenses', 'OSL-Management', 'OS @ Telekom' (which is highlighted in red), 'OSLiC @ Telekom', 'OS @ T-Systems', and 'Summary'. Below the navigation bar, the title 'R^{OSL!}!' is displayed in large, bold, black letters. To the right of the title, the text 'Solution?' and 'Open Source License Compendium' is shown. The main content area contains the text: 'Unfortunately such an Open Source License Compendium did not exist.' A small vertical watermark on the right side reads '(c) K. Reincke, G. Sharpe, Deutsche Telekom AG'. At the bottom of the slide, there is a date '2013-05-22' and a page number '17'.

- Unglücklicherweise gab es so ein Kompendium nicht. Und was passiert in der Open Source Community, wenn etwas nicht existiert, was existieren sollte? Glücklicherweise nimmt irgendjemand die Dinge dann in die Hand ...
- Unfortunately such an **Open Source License Compendium** did not exist. But fortunately - as often done in the community - anyone takes the task ...

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R_OS_L!

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

Telekom is writing an
Open Source License Compendium



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

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

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- Die erste Entscheidung der DTAG war, diese Kompendium selbst zu schreiben – verbunden mit der Vorgabe: einfach und verlässlich.
- The first idea of DTAG to solve this issue is to write an Open Source License Compendium following
 - the mission: Support our developers to use Open Source Software compliantly – as easy as possible
 - the motto: Offer only one reliable way for each license and each use case in a simple and easy to find manner

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R_OS_L!

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

Telekom is giving it free: The
Open Source License Compendium



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

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- Und die zweite Entscheidung der DTAG war, dieses Compendium samt aller Quellen selbst als eine Art von Open Source Software freizugeben – also alle Materialien unter der Creative Commons Lizenz Share Alike Lizenz – sozusagen der GPL für Dokumente.
- The second idea of DTAG is to publish this compendium under the Creative Commons License Share Alike – a license which might be viewed as GPL for documents.

Commercial Licenses Open Source Licenses OSL-Management OS @ Telekom OSLiC @ Telekom OS @ T-Systems Summary

R_OS_L!

Be invited, be welcome!
We want to collaborate.

Telekom is giving it free: The
Open Source License Compendium

**? What
– the hell –
does all that mean concretely ?
Demo or Die!**



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Demo OSLiC.

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R^OS^L!

Feedback?
... on the way



enormously helpful

great work

very informative

need's an interactive interface

so daunting

FSFE European Legal & Licensing Workshop 2013, Amsterdam

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- Das Feedback war zweigeteilt:
 - Große Ermutigung, vielfacher Dank gerade von Firmen bis hinein in den ostasiatischen Raum, und auch Bewunderung dafür, dieses schwierige Thema so systematisch in den Griff bekommen zu haben.
 - Und zugleich das Aussage, dass das OSLiC in dieser Form abschrecke. Die Lernkurve sei zu flach. Es sollte eine Online-Version geben, die auf alle Begründungen verzichtet und auf die reine Nutzbarkeit zielt.
- The feedback was a split vote:
 - Big encouragement, many thanks – especially of larger companies, and great admiration for having structured this topic successfully.
 - But also the message, that the OSLiC is daunting, that it won't be used by the intended readers, and that it should exist an interactive version.

Commercial Licenses Open Source Licenses OSL-Management OS @ Telekom OSLiC @ Telekom OS @ T-Systems Summary

R_{OS}L!

Collaborating with the community means Listening
... to the feedback:



The interactive version of the OSLiC, the
Open Source Compliance Advisor

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

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- Die dritte Entscheidung der DTAG war dann, das OSLiC als interaktive Webapplikation bereitzustellen, lizenziert unter der AGPL (wen schon, denn schon) und ebenfalls auf github gehostet: unter dem Namen OSCAd „the Open Source Compliance Advisor“.
- The third idea of DTAG is to republish this compendium as interactive php based web application, licensed under the AGPL, and also hosted on github, but with its own name: „the Open Source Compliance Advisor“..

Commercial Licenses Open Source Licenses OSL-Management OS @ Telekom OSLiC @ Telekom OS @ T-Systems Summary

R^{OSL!}!

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

Telekom is offers a second free tool: The
Open Source Compliance Advisor



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

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Demo OSCAd.

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R_OS_L!

Be invited, be welcome!
We want to collaborate.

State of the OSLiC & OSCAd



ready for testing :

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

still open:

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



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Commercial Licenses *Open Source Licenses* *OSL-Management* *OS @ Telekom* *OSLiC @ Telekom* *OS @ T-Systems* *Summary*

R_OS_L!

Be invited, be welcome!
We want to collaborate.



opensource@telekom.de
<http://dtag-dbu.github.com/oslic>
<http://dtag-dbu.github.com/oscad>
 *<http://oscad.fodina.de/>



* valid until OSCAd will have found is durable host 2013-05-22 25

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- So, for summarizing the result:
- We, DTAG, need a supporting tool for acting according to the Open Source licenses - but without investing to much manpower.
- First, we set up the internal Telekom Open Source Review Board
- Second, we are going to reduce the work of our OSRB by writing a simple to use compendium covering to-do-lists for the standard case.
- Third – as a giving back to the community (and as process of a public review) – we've published this compendium in the spirit of open source
- Fourth, we listen to the feedback and published also a free interactive version of the OSLiC, the Open Source License Advisor OSCAD



Commercial Licenses Open Source Licenses OSL-Management OS @ Telekom OSLiC @ Telekom OS @ T-Systems Summary

R^{OSL!}

Be invited, be welcome!
We want to collaborate.

Many thanks for your time and attention!

k.reincke@telekom.de
<http://www.oslic.org/>



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