



Open Source: Choice. Confidence. Control.



Top 10 Ways to Stretch Your Budget by Using More Open Source Software in 2010

Webinar on Dec 9, 2009

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Agenda

- About OpenLogic
- Open Source Adoption Trends
- Overcoming Internal Roadblocks
- Complying with Open Source Legal Requirements
- Hot Open Source Technologies You Should Consider

About OpenLogic

OpenLogic enables enterprises to
safely and successfully
acquire, use, support and control
free and open source software,
and thereby
transform their development efforts and
realize significant savings.

Aggregating Open Source for the Enterprise

Provisioning

- **Trusted source**
 - Certified library of 500+ projects and CentOS
 - Managed updates

Support

- **One throat to choke**
 - Consolidated SLA support

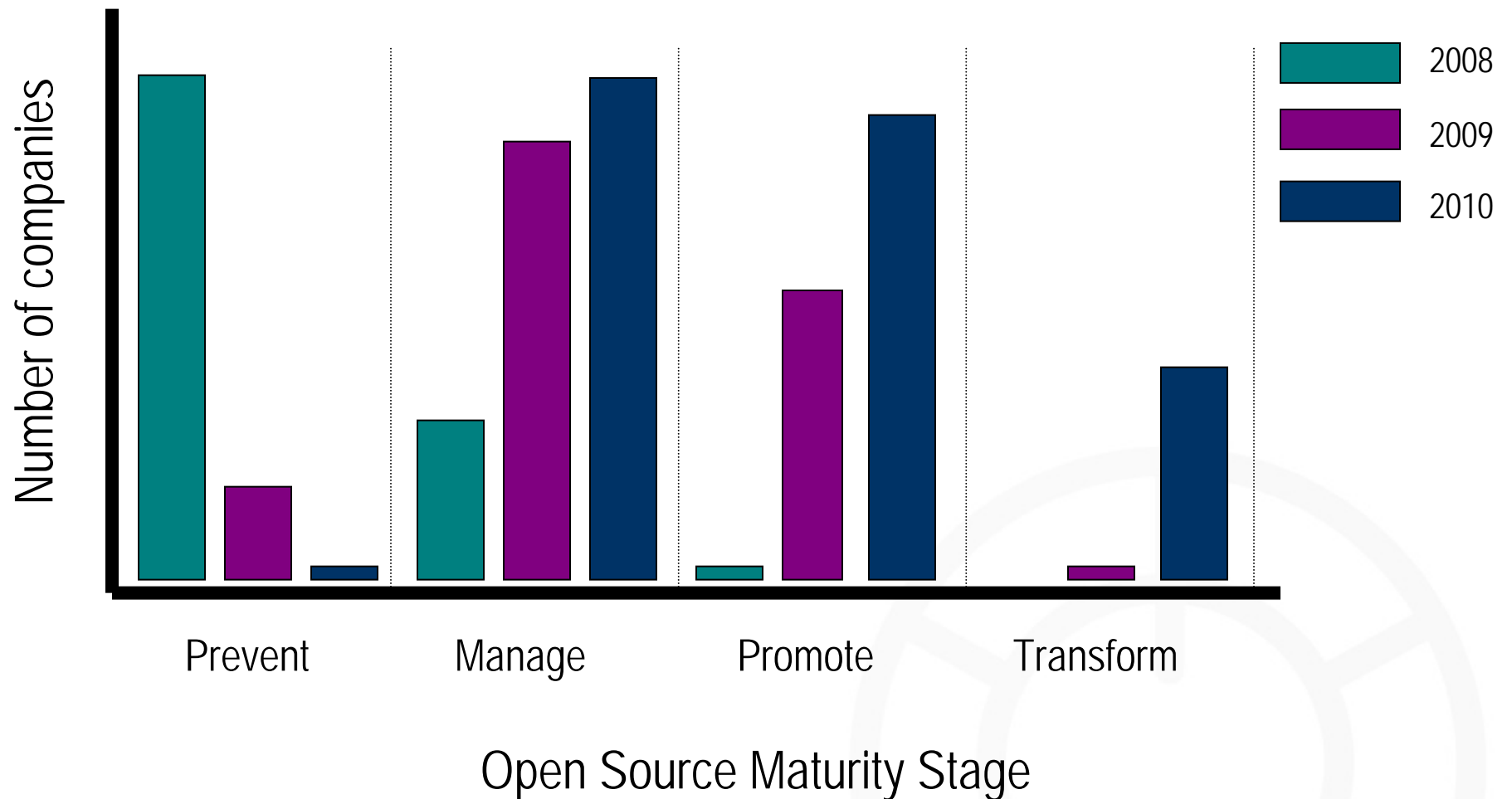
Services

- **Expertise**
 - Consulting Services & Training
 - Independent experts on OSS

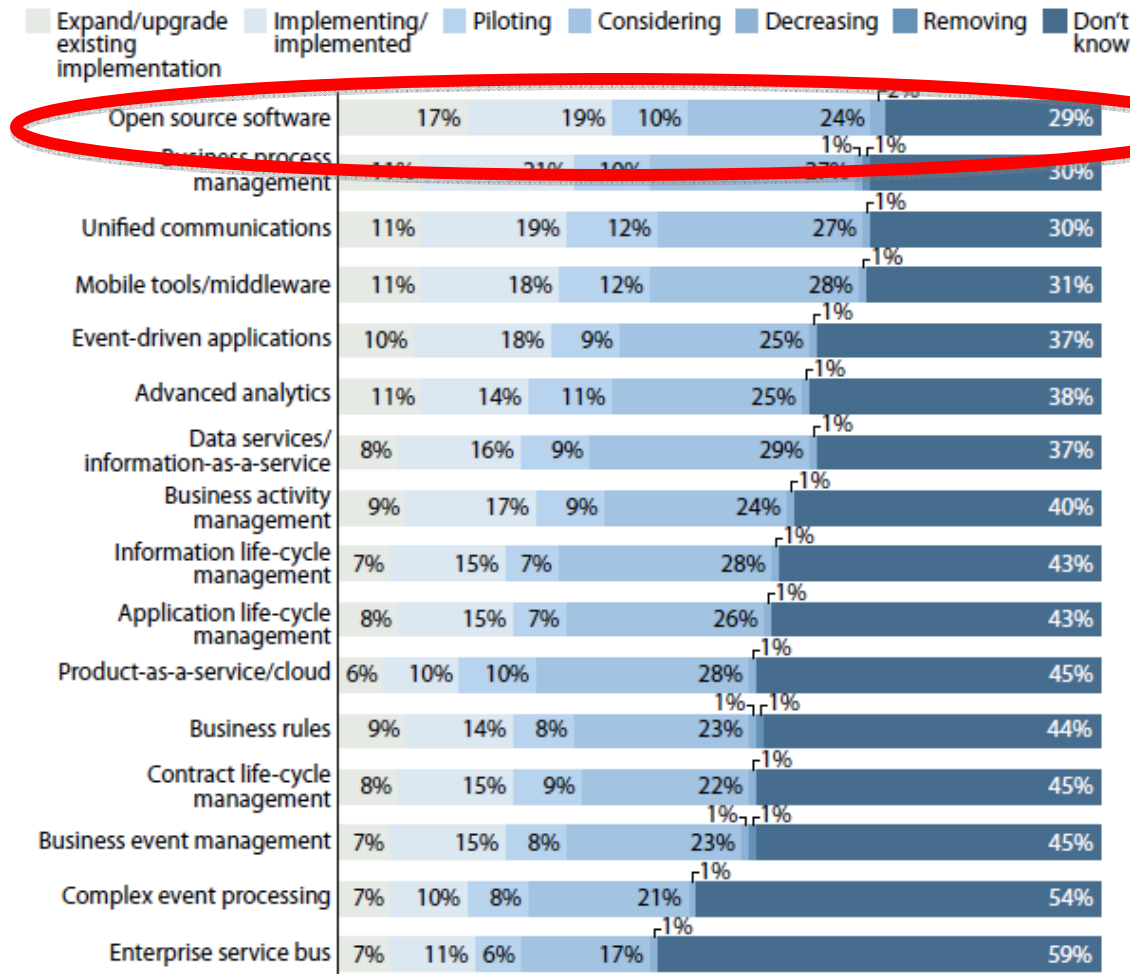
Governance

- **Risk reduction**
 - Indemnification
 - SaaS Governance platform

Adoption of Open Source in the Enterprise



Forrester: IT Organizations Set to Expand Use of Open Source in 2009



Open Source is #1 area where Companies will Expand Use

Base: 1,114 software development decision-makers at North American and European enterprises and SMBs (percentages may not total 100 because of rounding)

Source: Enterprise And SMB Software Survey, North America And Europe, Q4 2008

Source: Forrester Research

5 Roadblocks to Open Source Adoption

- 1. Don't know what open source to pick
- 2. Concerns about support
- 3. Different acquisition process
- 4. Concerns about risks of open source
- 5. Concerns about license compliance

Roadblock: Don't know which open source to pick

- There are hundreds of thousands of open source projects
- Only a fraction are enterprise-ready
 - Dead projects
 - No community
 - No active development
 - Bad licenses
 - Legal suits
 - Security issues
- The source is important
 - No guarantees that every download source has the right code
- Don't always know which ones are proven or best for any given use

Tip: Define a certification and provisioning process

- **Define critical criteria to certify open source for potential use**
 - Adoption
 - Community
 - Support
 - License/Legal
 - Technical
- **Define allowable download sources**
 - OLEX
 - Project home pages
 - Forges
 - Linux distros
 - Internal repository

Tip: Leverage resources to make your selection

- **OpenLogic Certified Library**
 - 42-point certification process
 - Available on free website - OLEX - olex.openlogic.com
- **OLEX**
 - 500+ enterprise-ready open source packages
 - Comprehensive search capabilities
 - Info on licenses
 - Security alerts
 - Vetted downloads from a trusted source
- **OLEX Wazi**
 - Comparison articles on open source in various categories
 - In depth articles and how-tos

Roadblock: Concerns About Support

- **Community support**

- Responsiveness varies widely
- You may get an instant answer or no answer
- Newbies may get flamed if they break project norms
- No SLAs
- Bugs will be captured. Most likely to be fixed if you provide a patch

- **Vendor support**

- Available on some projects
- Most popular projects will have multiple vendors supporting
 - ▶ Don't be afraid to get competitive bids or ask for head-to-head tests
- Options include "single project" vendors or open source support aggregators

- **Do-it-yourself support**

- Use internal experts

Tip: Choose the right support for your needs

Mission-critical

Yes

No

Internal expertise

Lots

Internal experts
backed by vendor support

Internal experts
backed by community

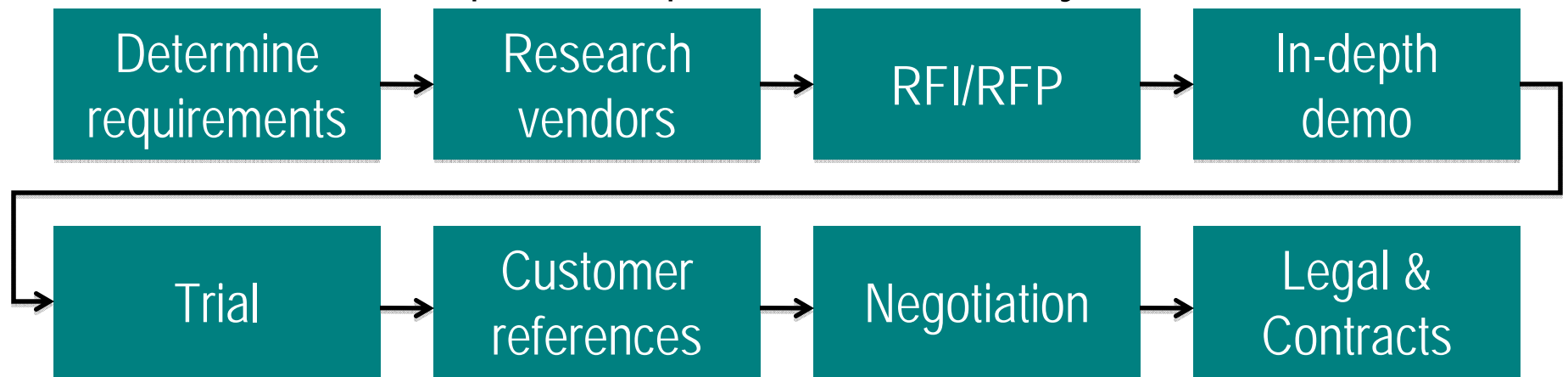
Limited

Vendor support

Vendor support
or community support

Roadblock: Different Acquisition Process

Traditional software – purchase process facilitated by vendor

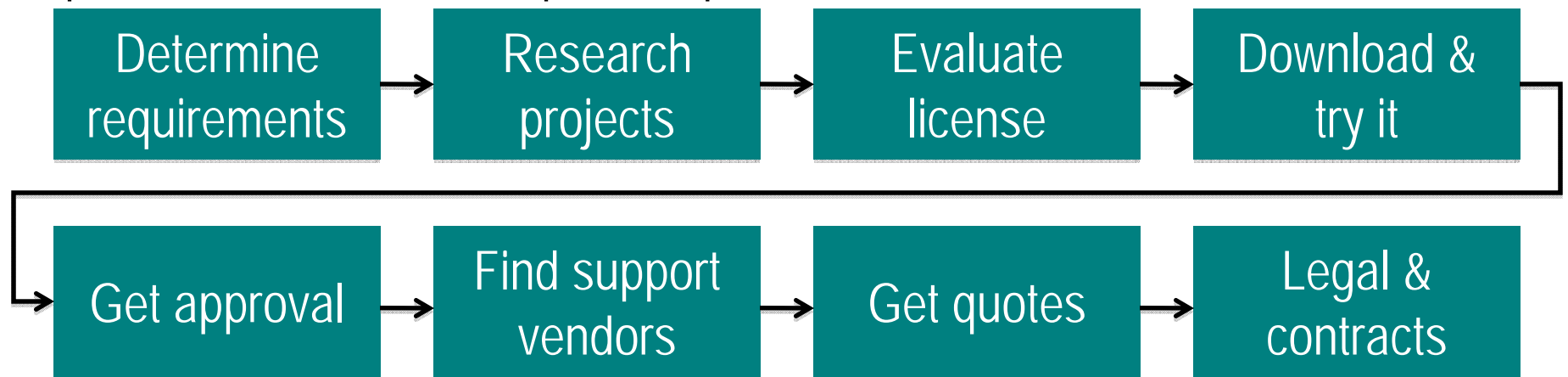


Open source software – often no defined acquisition process



Tip: Create a process for acquiring open source

Open source software acquisition process



- Provide guidelines to developers on do's and don'ts
- Involve architecture, management, legal and procurement
- Automate an approval process
- Audit to ensure compliance

Roadblock: Concerns About Risks of Open Source

- **Support**
 - I can't get support
- **Quality**
 - It's not high quality
- **Security**
 - It's not secure
- **IP Ownership**
 - An open source project used someone else's code or patents

Tip: Address Concerns

| Concern | Reality | How to Address |
|--------------|---|---|
| Support | Several support options are available, including commercial, SLA support | Research support vendors. Get a contract with and aggregated support providers. |
| Quality | Quality of open source varies – but many projects are same quality as traditional, closed-source alternatives | Use certified open source. Read review and articles. Talk to other users about quality. |
| Security | Open source is as secure as traditional, closed-source alternatives | Review security vulnerabilities for open source and compare to closed source software |
| IP Ownership | Traditional closed source alternatives can have same problem. | Use certified open source. Purchase open source indemnification. |

Roadblock: Concerns About License Compliance

- **License proliferation**
 - Hundreds of licenses: many similar licenses with modifications and vanity licenses
- **Multiple packages, multiple licenses**
 - Packages have multiple licenses. It's difficult to be compliant when you don't even know what you have
 - Open source packages bundle other open source packages
- **Incompatibility**
 - Licenses can be at odds with each other, need to know if there are conflicting obligations
- **Compliance**
 - How do you comply with the many terms and conditions of multiple licenses?
 - Ultimately you want to be compliant and protect yourself from possible infringement or non-compliance actions

Tip: Distribution is Critical

- **Distribution triggers additional obligations**
 - Copyleft provisions and others
- **Distribution makes it more likely you will get caught**
 - Since others have access to your software
- **Distribution may be broader than you realize**
 - Distribution is any transfer outside the walls of the organization.
 - ▶ Selling software containing OSS
 - ▶ Selling HW or devices that run software containing OSS
 - ▶ Giving away software containing OSS
 - ▶ Giving software containing OSS to customers
 - ▶ Giving software containing OSS to partners
 - ▶ Enabling download of software containing OSS

Tip: Follow License Compliance Best Practices

- **Get “manifest” from developers**
 - internal & 3rd party
- **Validate that “claimed” license is accurate**
 - Look in source code, not just website
- **Scan software (binaries &/or source)**
 - In early development phases
 - On bringing in 3rd party code
 - Before distribution
- **Review project dependencies and their licenses**
- **Compare license text to standard license test**
 - Text may have been changed
 - Additional clauses may have been added

Tip: Follow License Compliance Best Practices

- **Review licenses for obligations**
 - Look for license conflicts
- **Search for lawsuits on projects**
- **Assess potential modification/derivative work issues**
 - Assess IP/Patent impact
- **Create “compliance checklist” for developers**
 - Make sure to verify that checklist is completed

OLEX Enterprise Edition and OSS Discovery scanners can help.

Best Practices: License Compliance

- Create “compliance checklist” for developers
- Developers to implement checklist
- Review of checklist items
- Final check to validate “Bill of Licenses”

Hot Open Source Technologies You Should Consider

- The Usual Suspects
- Linux – There's Not Just One
- Elephants in the Data Center
- Enter the Matrix
- Scripting: Not Just for Kiddies Any More

The Usual Suspects

- **Apache, Tomcat, JBoss, MySQL**

- Over 110m public Apache Web Servers¹

- **Benefits:**

- Developers: stable, well-documented, comply with industry standards
- Architects: widely deployed, easily supported
- CIO's: enterprise-ready, able to replace IBM WebSphere. WebLogic, Oracle DB in growing number of situations



¹Netcraft.com – November 2009

Tip: Step up use of “usual suspects”

- **These open source projects are ready for prime time in the enterprise**
 - High quality, proven, scalable
 - Commercial support available from multiple sources
 - Strong and active communities
- **Add to your standards list**
 - Move your usage profile to “require evaluation” of these open source alternatives
- **Consider using for:**
 - Major new projects
 - Replacements or migrations from commercial closed-source

Linux – There's Not Just One

■ CentOS



- Enterprise Linux distro made from publicly available sources of RHEL, but without Red Hat logos & trademarks
- Major releases: Available within 4-6 weeks of RHEL
- Patches: Available within 72 hours of RHEL

■ OpenLogic offers support and OpenUpdate

■ Benefits

- Developers: familiar, runs all your current software
- Architects: Binary-compatible with RHEL
- CIO's: significant cost savings over RHEL

Tip: Get Started with Community Linux



- Start evaluating CentOS and other community operating systems
 - CentOS for servers
 - Debian, Ubuntu for desktops
- Potential places to start:
 - Departmental apps
 - Non-mission critical
 - Not ultra high performance situations
- Gain experience and expand as appropriate
- Evaluate commercial support options

Elephants in the Data Center – Cloud Computing



- Hadoop, HBase, and friends
- Big deployments – Yahoo, Amazon, Facebook, Visa
- “Big Data”, MapReduce, and the NoSQL movement
- Benefits
 - Developers: don’t battle SQL when all you need is a big hash table
 - Architects: freedom from RDBMS sharding and scaling nightmares
 - CIO’s: save \$millions while solving critical business problems with private clouds

Gartner: Cloud #1, Advanced Analytics #2 for 2010

Tip: Get educated and experiment

- **Get educated on open source cloud enablers (Hadoop, HBase, etc)**
 - Are there places it applies in your business?
- **Start experimenting with open source in clouds**
 - Public clouds are a great place to experiment
 - ▶ New applications
 - ▶ Applications with temporary demand spikes
 - ▶ Testing
- **Consider private clouds as a way to harness idle computing cycles**

Enter the Matrix - Virtualization

- Xen, KVM, VirtualBox
- Amazon uses Xen on 1,000's of EC2 machines
- Linux distros are bundling OSS hypervisors
- Gartner: 5.8m VM's today, 58m by 2012
- Benefits
 - Developers: easy experimentation, testing
 - Architects: less hardware to buy, maintain
 - CIO's: save up to \$100k/year per 500 machines converted in power and cooling costs alone¹



¹ComputerWorld – November 2009

Tip: Use for testing and experimenting

- Open Source Hypervisors are on par with commercial, closed-source equivalents
- OSS Virtualization management tools are still catching up
- Look for places to deploy hypervisors
 - Testing
 - Experimenting
 - Other non-production
 - Non-mission critical production apps

Scripting: Not Just for Kiddies Any More

- Groovy, Ruby, Python, PHP, Perl
- Scripting languages and key frameworks
- Benefits
 - Developers: be more productive, have more fun
 - Architects: beat deadlines, react faster to change
 - CIO's: show results while saving money



Twitter – Ruby/Rails

Facebook – PHP

LinkedIn – Groovy/Grails

Google – Python

Tip: Learn a new language

- Java is not the only language
- Modern scripting languages excel at web applications
- Complementary to agile development processes
- Look at the modern object-oriented scripting languages and find one to add to your technology toolbox
- Try a test project and evaluate productivity gains and increase in agility

Recap of Hot Open Source Technologies

- **The Usual Suspects**
 - Apache, Tomcat, JBoss, MySQL – big wins
- **Linux – There's Not Just One**
 - CentOS – same as today, but cheaper
- **Elephants in the Data Center – Cloud Computing**
 - Hadoop – broaden your horizons
- **Enter the Matrix - Virtualization**
 - Xen, KVM, VirtualBox – easier testing, cheaper deployment
- **Scripting**
 - Ruby/Rails, Groovy/Grails, Python/Django – be more agile

Summary

- **Companies are shifting their use of open source**
 - From cautious management to proactive consideration
- **Put in place the policies, processes & infrastructure you need to use open source successfully**
 - Certification & Acquisition processes
 - Support & Indemnification contracts
 - License Compliance
- **Start looking at increased use of open source technologies**

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