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What to Share, When, and Where
– Or – How to balance between Value and Risk

Why need a contribution strategy?

- Answers if, why, when, and how something should be open sourced

- Help to execute the overarching open source strategy

- Promotes and support contributions in line with business objectives

- Highlights potential costs and risks up-front

- Enables the balancing between objectives and complexities

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Enable critical assessments

- Support individuals posting contribution request to make their case

- Support decision makers to make informed decisions

- Reduce doubts and make contribution process more efficient

- Enable a proactive planning on contributions

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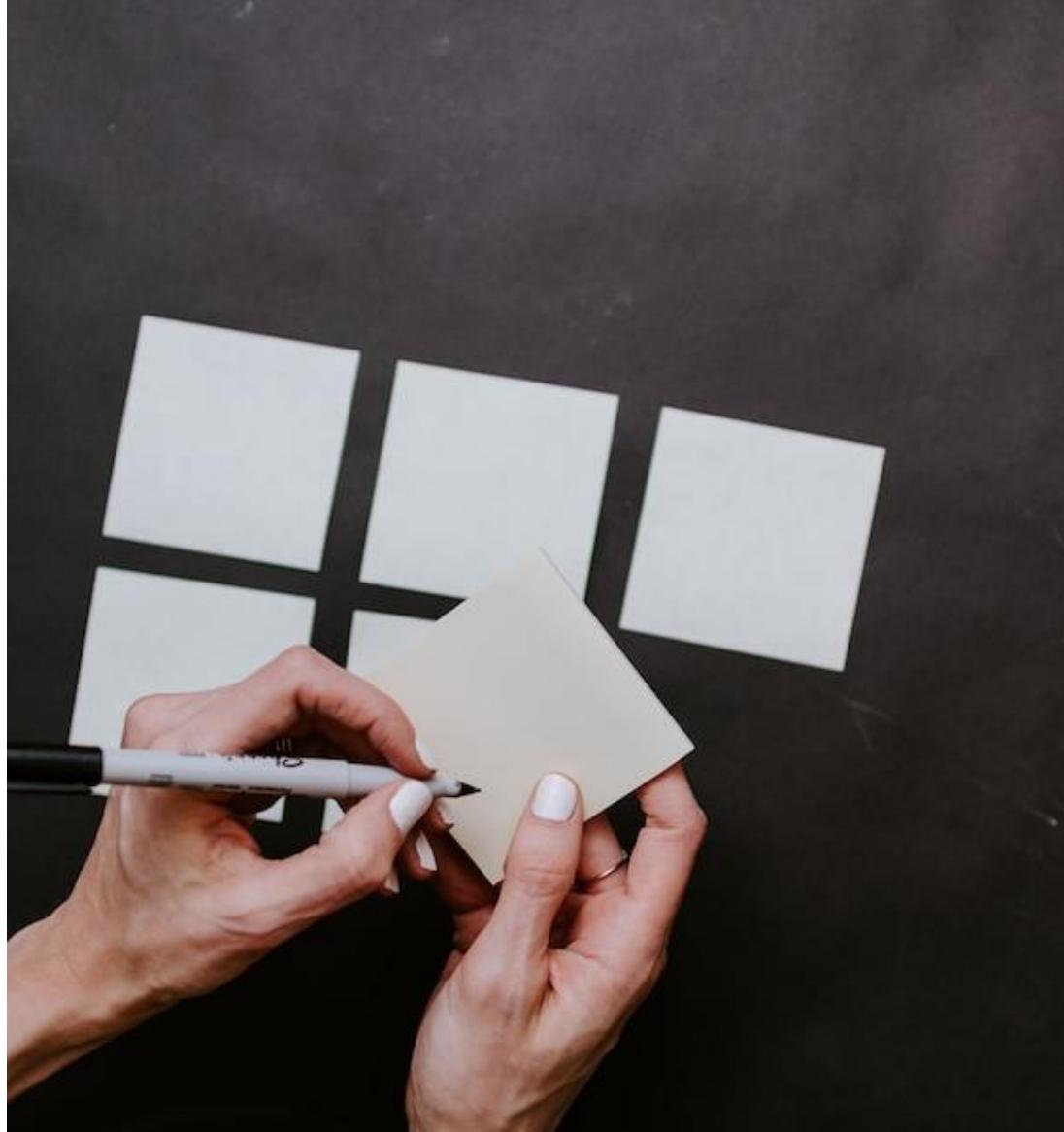
Provide clarity on process

- Lower barrier and remove uncertainties

- Decision options
  - Reject, conditional accept, or accept

- Contribution options
  - Existing community, new community in specific external entity, or new community "in the wild"

- Needs to be weighed against potential objectives and complexities

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Systematic approach needed in the design

- Lay out a plan and involve all stakeholders early on

- Do not take objectives or complexities for granted

- Consider different types of projects, contexts, and scope

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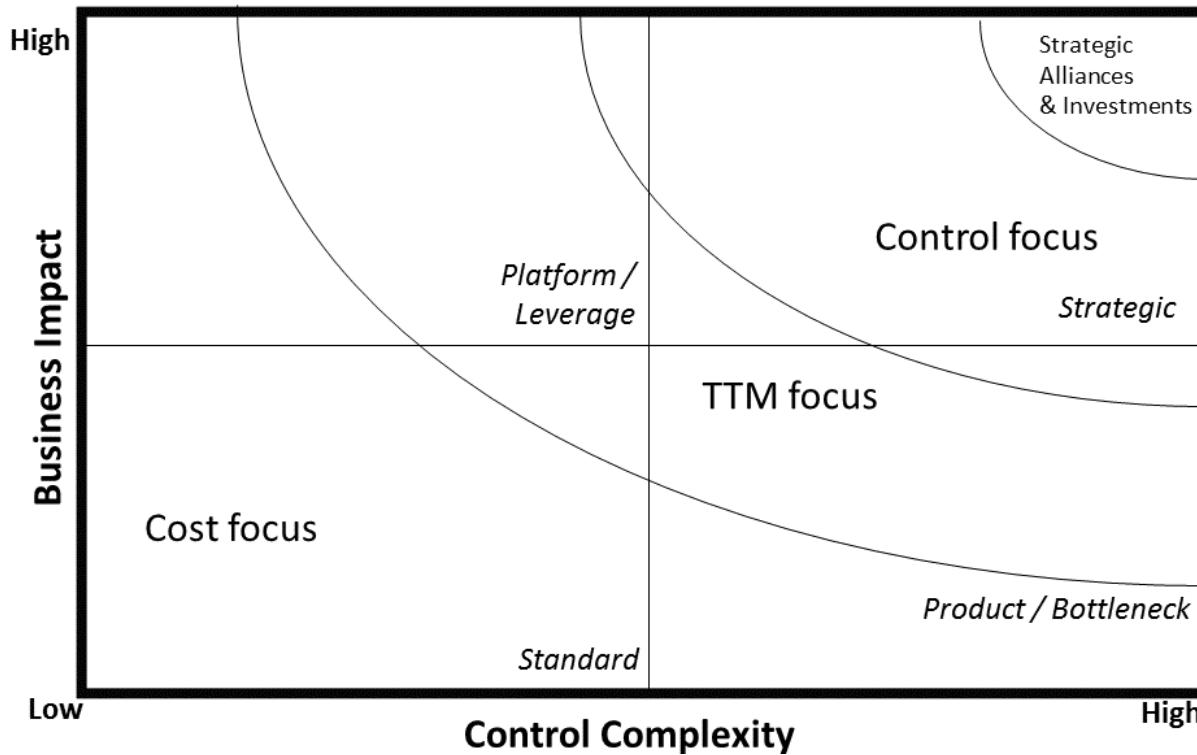
How do you balance between the objectives and complexities?

Contribution Acceptance model
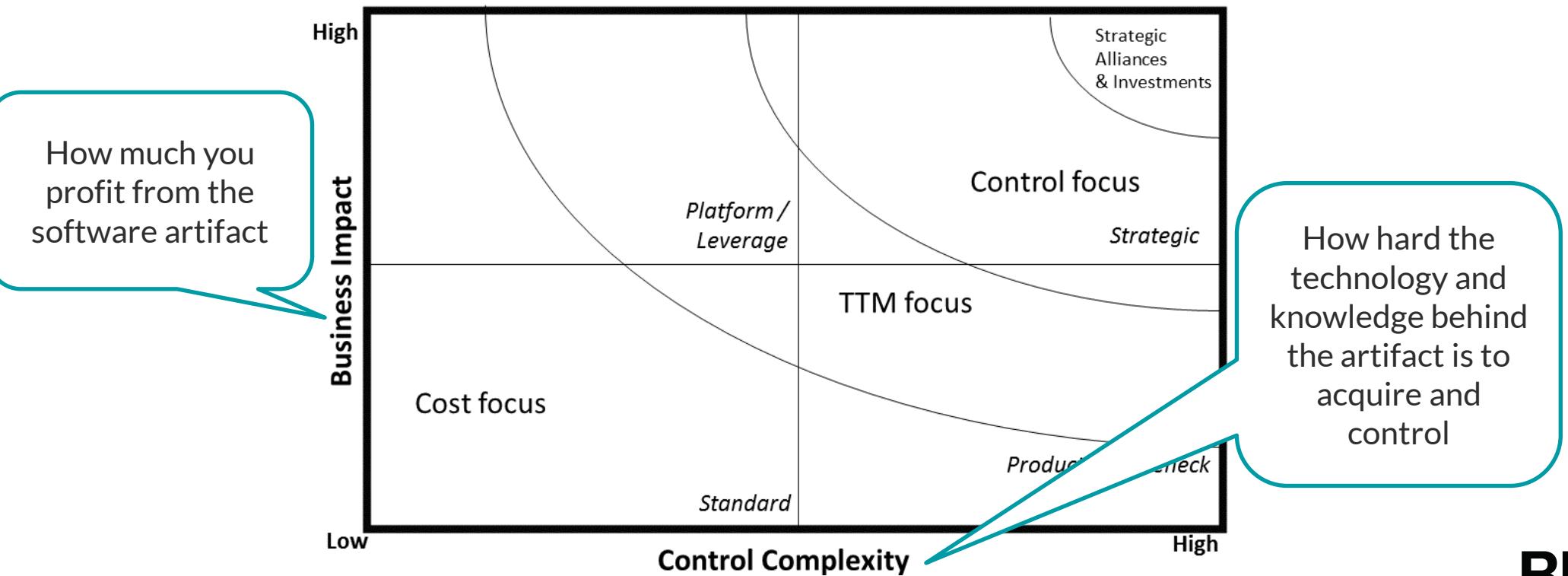
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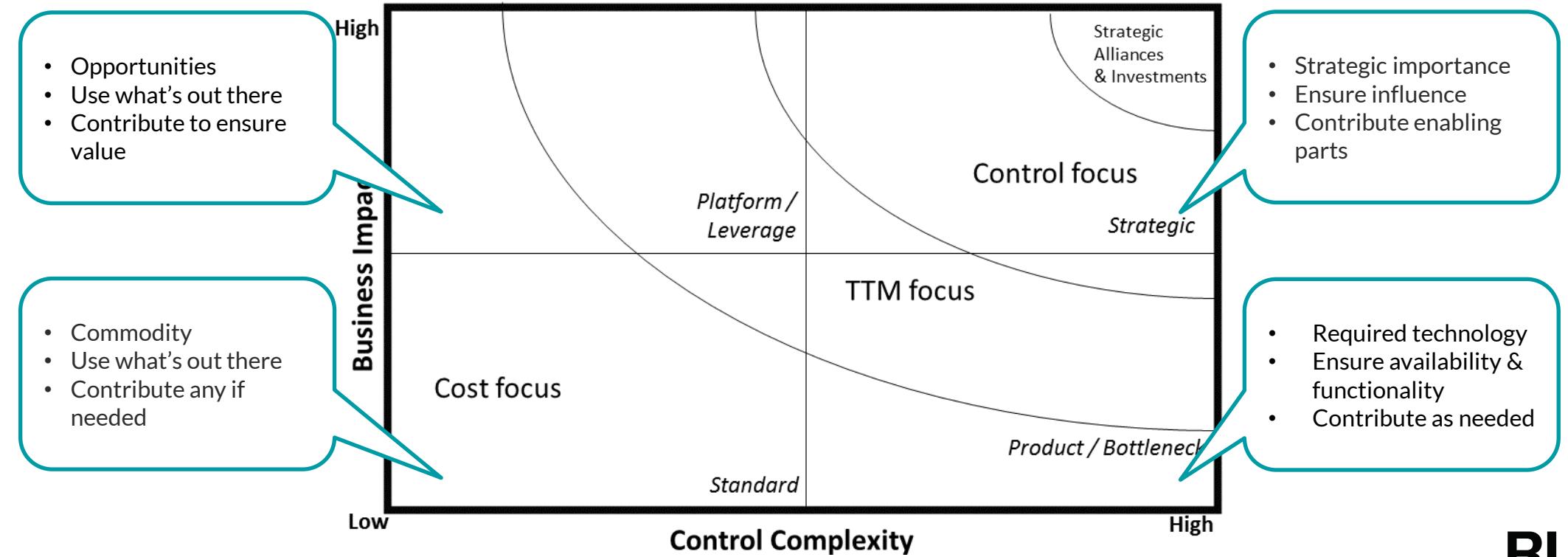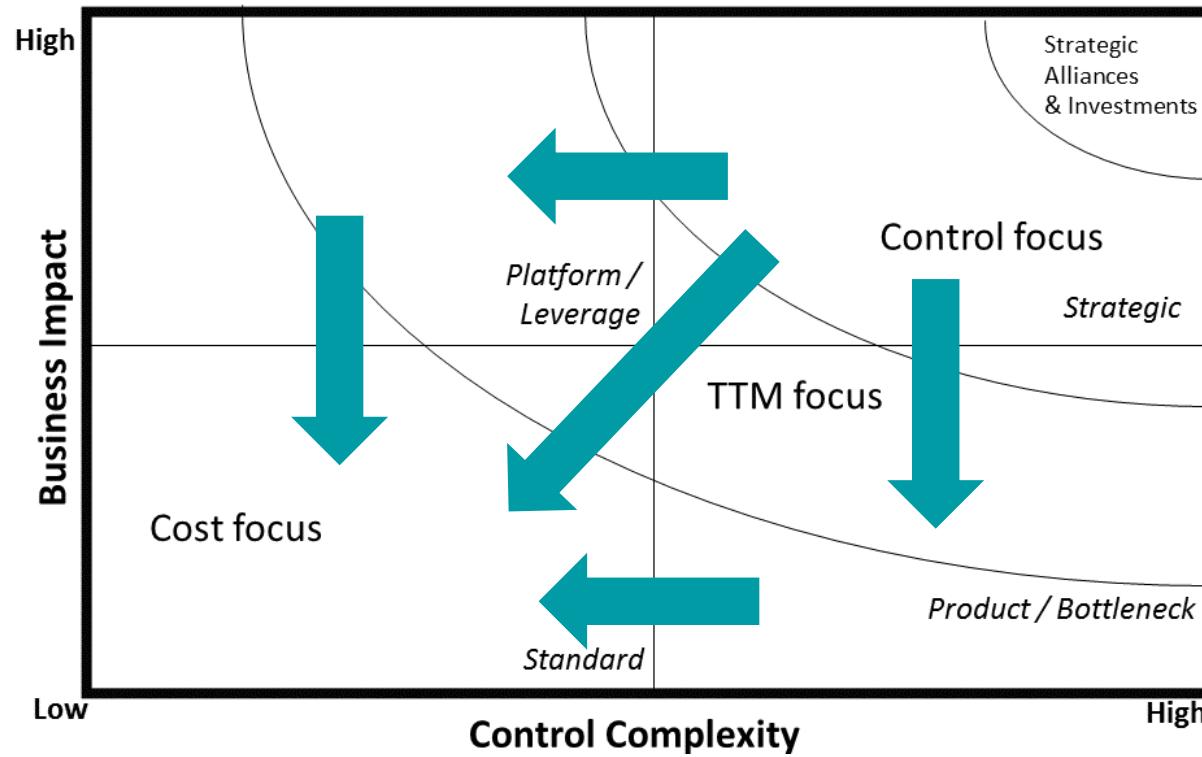
Business impact vs. Control complexity

Generic Contribution Strategies

- Opportunities
- Use what's out there
- Contribute to ensure value

- Commodity
- Use what's out there
- Contribute any if needed

- Strategic importance
- Ensure influence
- Contribute enabling parts

- Required technology
- Ensure availability & functionality
- Contribute as needed

High

Strategic Alliances & Investments

Control focus

Platform / Leverage

Strategic

Business Impact

TTM focus

Cost focus

Product / Bottleneck

Standard

Low **High**

Control Complexity

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Impact of commoditization

Weights will differ based on objectives and context

Contribution Objectives and Complexities

- Contribution objectives explicate different types of benefits that may be gained because of a contribution

- Contribution complexities exemplify aspects that may complicate the contribution, or in other ways imply cost or risk for the organization

- Basis for designing Contribution Strategy guidelines and related contribution process

- Paper: https://doi.org/10.1007/s10664-020-09855-2

Contribution Objectives

- Reputation-centric objectives

  - Prove skill and influence

  - Be a good open source citizen

  - Improve employer branding

  - Increase transparency

- Supplier-centric objectives

  - Create price pressure

  - Outsource infrastructure operation

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Contribution Objectives

- Strategy-centric objectives
  - Enable data sharing, and gathering
  - Standardize a solution
  - Build a software ecosystem
  - Improve partner collaboration
- Engineering-centric objectives
  - Open up innovation process
  - Extend development resources

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Contribution Complexities

- Control-centric complexities

  - Impact on value proposition

  - Impact on internal operations

- IPR-centric complexities

  - Differentiating functionality

  - Commoditization

  - Sensitive IPRs

  - Substitutes

  - License compliance
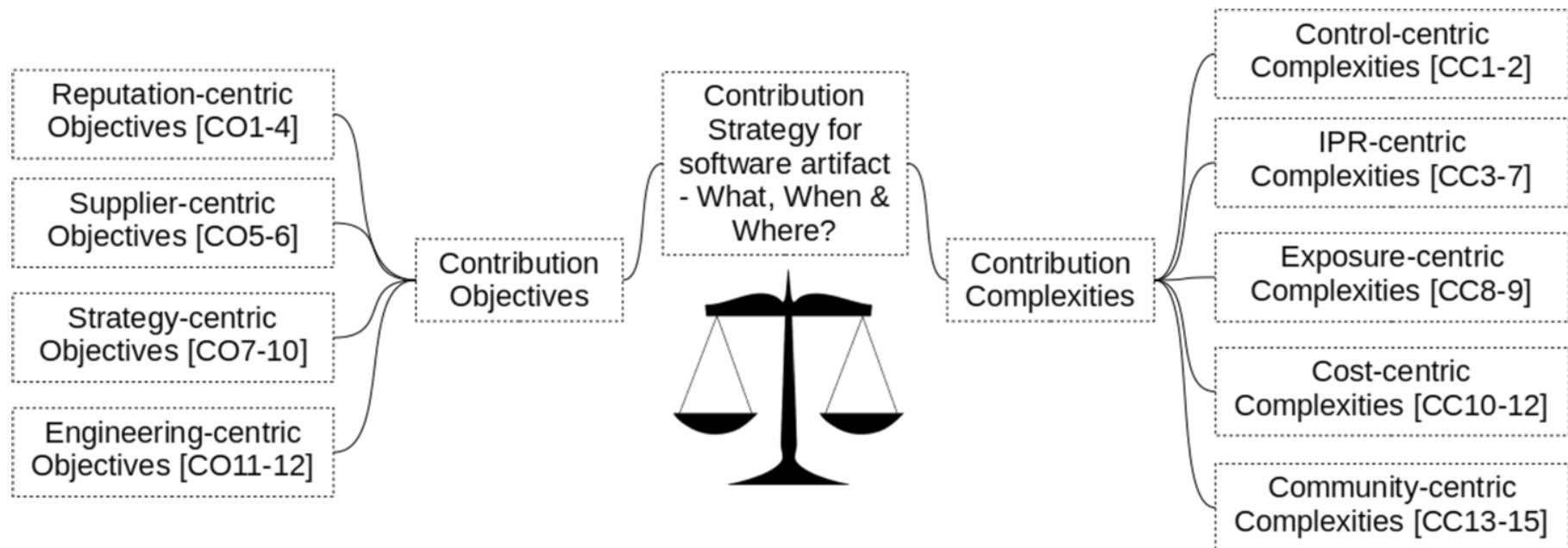
Photo by John Moeses Bauan | https://unsplash.com/photos/bEY5NoCSQ8s

Contribution Complexities

- Exposure-centric complexities
  - Ethical use
  - Security threats

- Cost-centric complexities
  - Budget and resource constraints
  - Modularity and architecture
  - Code alignment

- Community-centric complexities
  - External interest
  - Influence in community
  - Community health

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Balancing objectives and complexities

Reputation-centric Objectives [CO1-4]

Supplier-centric Objectives [CO5-6]

Strategy-centric Objectives [CO7-10]

Engineering-centric Objectives [CO11-12]

Contribution Objectives

Contribution Strategy for software artifact - What, When & Where?

Contribution Complexities

Control-centric Complexities [CC1-2]

IPR-centric Complexities [CC3-7]

Exposure-centric Complexities [CC8-9]

Cost-centric Complexities [CC10-12]

Community-centric Complexities [CC13-15]

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An (example) contribution process

- Pass basic open source training

- Submit contribution request form
  - Example questions:
  - https://doi.org/10.6084/m9.figshare.21104167

- Basic review by nearest Contribution officer
  - E.g., architect, senior engineer, or engineering manager

Basic review

- Initial check if contribution is motivated

- Potential complexities and how they are proposed to be addressed

- Complexity and size of contribution
  - Trival
  - Medium
  - Major

- Trivial approved by contribution officer

- Technical review for cleared contributions

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OSS Review board

- Medium and major contributions managed by open source review board

- Cross functional board with relevant stakeholders

- Major with explicit OK from senior mgmt. and patent review

- Can be broken down into a "fast-track" and "standard track"

Whitelitsting communities

- Enable community engagement

- Align with a specific community strategy

- Dedicate community representative responsible for community strategy and related contributions

- Revise and follow-up of whitelisting and community strategy

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General notes

- Ensure basic OSS training

- Educate on business goals and perceived risks and costs

- Decentralize decision making

- Support and empower teams directly

- Fast-track trivial and white-listed contributions

- Identify bottlenecks and remove friction

- Automate process (where possible) and enable follow-up of the contributions

- Consider if and how to manage private employee engagements

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TODO Group outbound guide

- Rich and in-depth knowledge developed through TODO Europe

- https://todogroup.org/guides/outbound-oss/
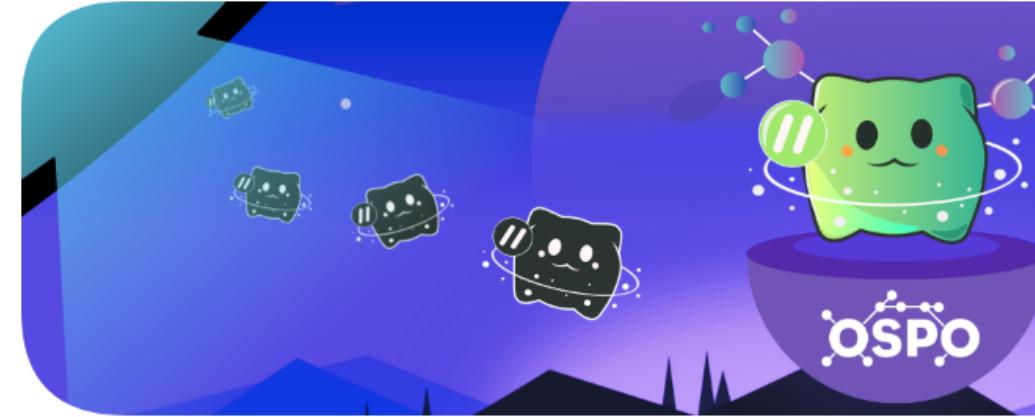
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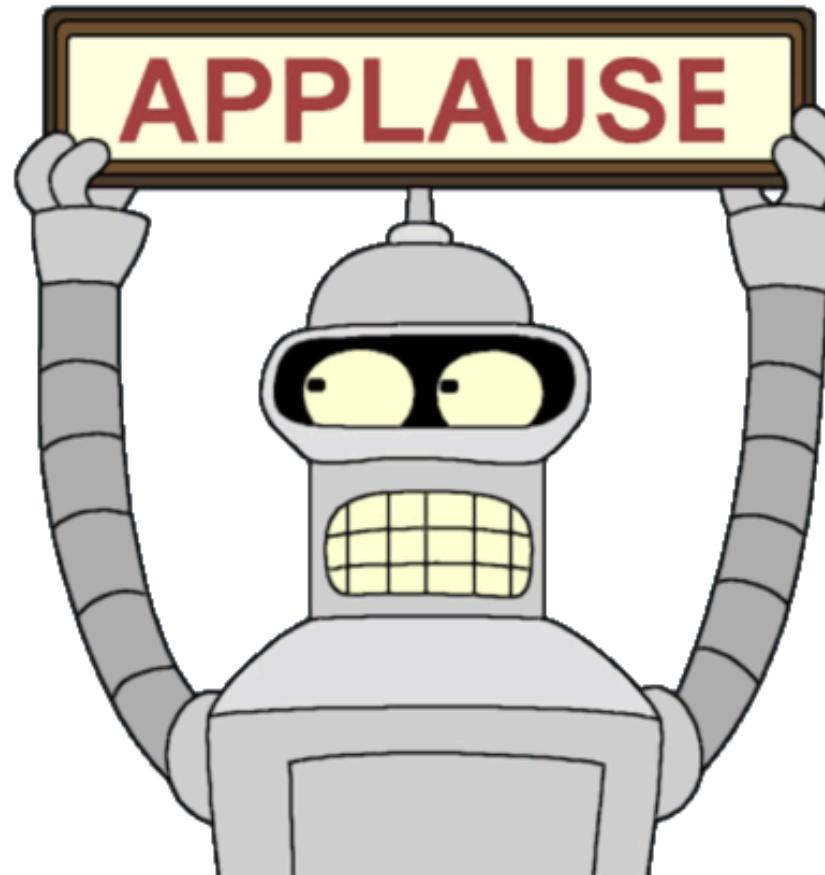
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README.md

👋 A Worldwide Community and Resour
Practitioners

https://github.com/todogroup

Questions to discuss in groups

- In your own organization,

  – what is the overarching strategy and incentives for engaging in and releasing Open Source Software?

  – what benefits may be gained because of a contribution? What objectives can motivate a contribution?

  – what risks and costs (or other types of complexities) do you see potentially blocking a contribution?

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Questions to discuss in groups

- In your own organization,

  – How does your current process for managing and promoting contributions look like?

  – What works well? What challenges do you experience?

  – How can you measure progress and impact of contributions?

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