What's the State of Open Source in Europe?

Insights from the World of Open Source: Europe Spotlight 2022

Cailean Osborne

12 May 2023

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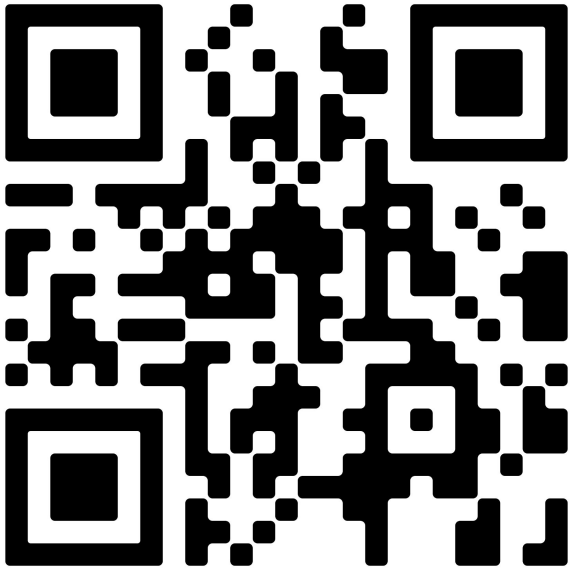
Download the report!

Introducing LF Research

About Linux Foundation Research



- Investigating the impact of open source collaboration to solve the world's most pressing challenges.
- Founded on a tradition of research excellence
  - Linux Kernel History Report
  - FOSS Contributor Survey
- Published 30+ research studies to date

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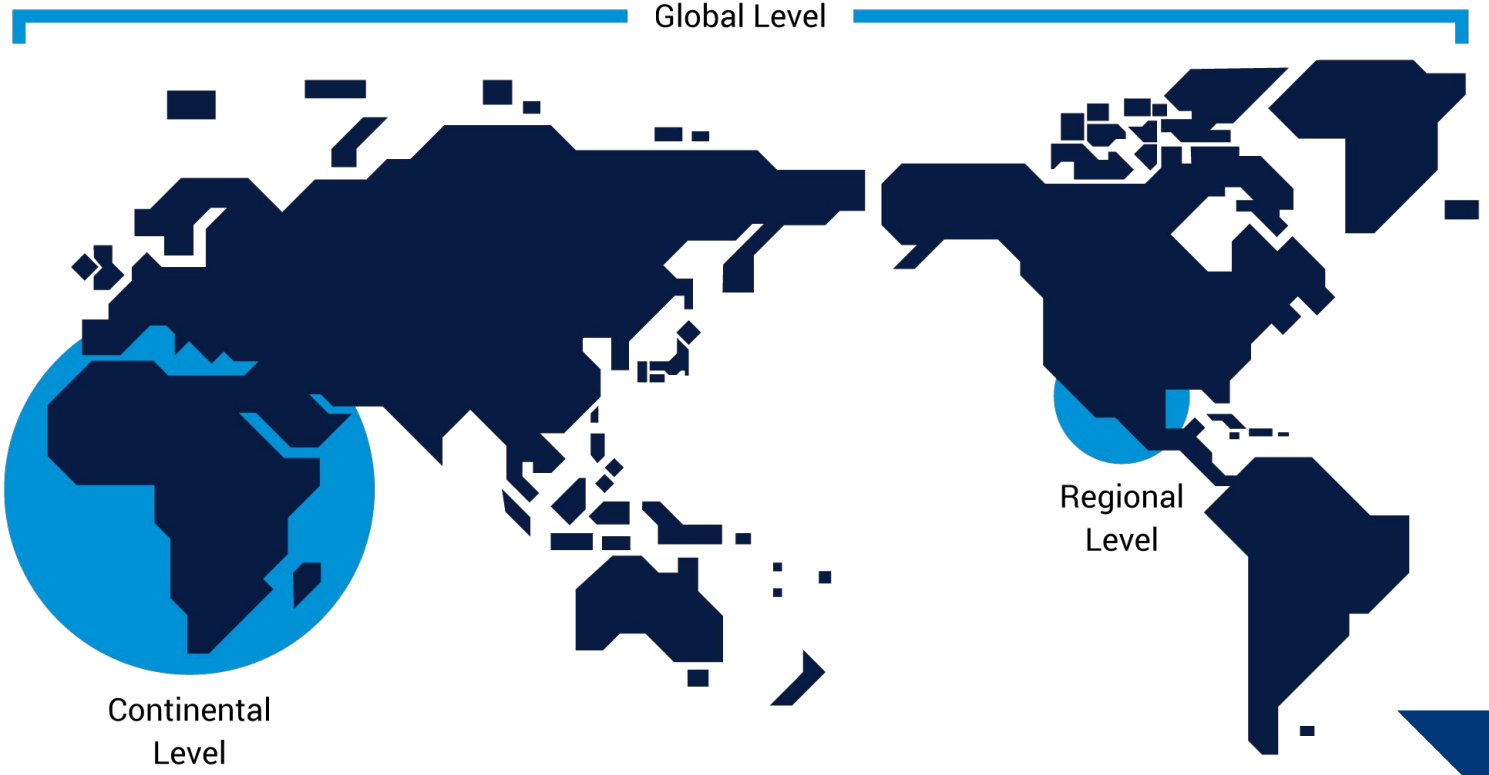
About Me

- Joined LF Research in 2022
- PhD in Social Data Science at the Oxford Internet Institute, University of Oxford (ongoing)
- Interests: open source software, digital commons, public interest computing

World of Open Source: Europe Spotlight 2022

World of Open Source: A new global framework



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We began with Europe to support the launch of LF Europe

Create a research project that explores open source trends in:

- **Consumption / Usage**
- **Contribution**
- **Leadership & Governance**

Identify leading industry sectors and countries that are outliers.

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Hello world!

On 14 September 2022, at OSS Summit Europe, we announced the formation of a European entity to foster collaboration in the region and to bring it to the global scale.

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What is Linux Foundation Europe?

Neutral governance entity in Europe
Belgium based non-profit to provide a local neutral asset ownership and Europe-aware project governance. Entry-point to the global LF federation.

Focus on Europe-strong projects
Support the creation and growth of collaborations between individual contributors, private and public sector on OSS, OSH, open standards, and open data.

Open to any organisation in the world
And free for existing Linux Foundation Members through reciprocal Membership at no cost.

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THENEWSTACK

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OPEN SOURCE / SECURITY / SOFTWARE DEVELOPMENT

At Open Source Summit: Introducing Linux Foundation Europe

The new group's leader says it will support creation of an open source engine for building digital wallets. Plus: results from a survey of Europe's open source community.

Sep 14th, 2022 8:13am by Heather Joslyn

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Open Source Insider

Newly formed Linux Foundation Europe provides inside track on OSS Dublin 2022

...an Whiting, director of media relations and ...oundation.

...ing live this month from the Open Source Summit

Blog

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TOPTHEMEN:

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Heimat für Open-Source-Innovation: Europa bekommt eine eigene Linux Foundation

Mit der Gründung der Linux Foundation Europe kommt der hiesige Open Source Summit nach der langen Pandemiepause wieder in Gang.

Lesezeit: 3 Min. In Pocket speichern 20

SIGN IN / UP

The Register

SOFTWARE 9

Linux Foundation launches European division

Plans to drive more open source – and more transparency – into public sector

Liam Proven and Thomas Claburn Tue 20 Sep 2022 / 08:30 UTC

OPEN SOURCE SUMMIT The body behind the biggest open source project in the world has opened a European division.

Sometimes, attending a European trade show – even virtually – can give you

COMPUTABLE

Zoeken Artikelen

Europa krijgt eigen Linux Foundation

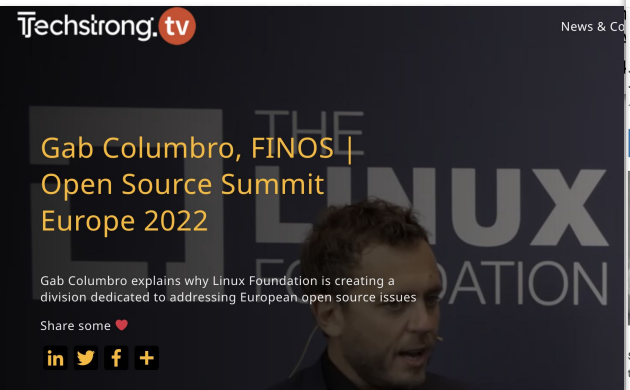
16 september 2022 10:50 | Alfred Monterie | 1

Topic Overheid

Europa is een eigen Linux Foundation rijke... gesneden op de speciale behoeften van Eu... bruikers en solutionproviders, terwijl de ho... pees grondgebied plaatsvindt. Doel is de g... menwerkingen in Europa.

Dit is tijdens de Open Source Summit Europe... Dublin bekendgemaakt. Het hoofdkwartier var... Brussel. Tot de twaalf leden van het eerste uu... Avast, Bosch, BTP, Esatus, RTE, SAP en Sus... Semiconductors en TomTom goed vertegenwoordigd. De Bank of England, OpenForum Europe... tuut RISE zijn geassocieerd lid. Deelname aan de Europese tak staat voor elke organisatie ope...

Techstrong.tv News & Co...



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20 Settembre 2022

Methodology

Research Team

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IN PARTNERSHIP WITH
{CODEMOTION} esade FAU FINOS
IGOP Institut de Govern i Polítiques Públiques
UAB Universitat Autonoma de Barcelona
LFPUBLICHEALTH
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World of Open Source:
2022 Europe Spotlight
TAKE THE SURVEY

Methodology

Survey Distribution Partners (16):

Including leading technical universities, developer communities, incubators, & consultancies:

- Codemotion
- TU/Eindhoven
- TU/Berlin
- TODO Group Europe Chapter

Survey Screening Criteria:

1) Real person!
2) European resident
3) At least part-time employed
4) Did not answer “do not know / not sure” when it came to their employer’s approach to open source.

Methodology

Fielding:
Survey was fielded for 6 weeks (May to June 2022)

Sample Size:
- 1,050 “starts” - European respondents who qualified for the survey.
- 750 completed questions pertaining to open source consumption.
- 670 respondents completed the survey from beginning to end.

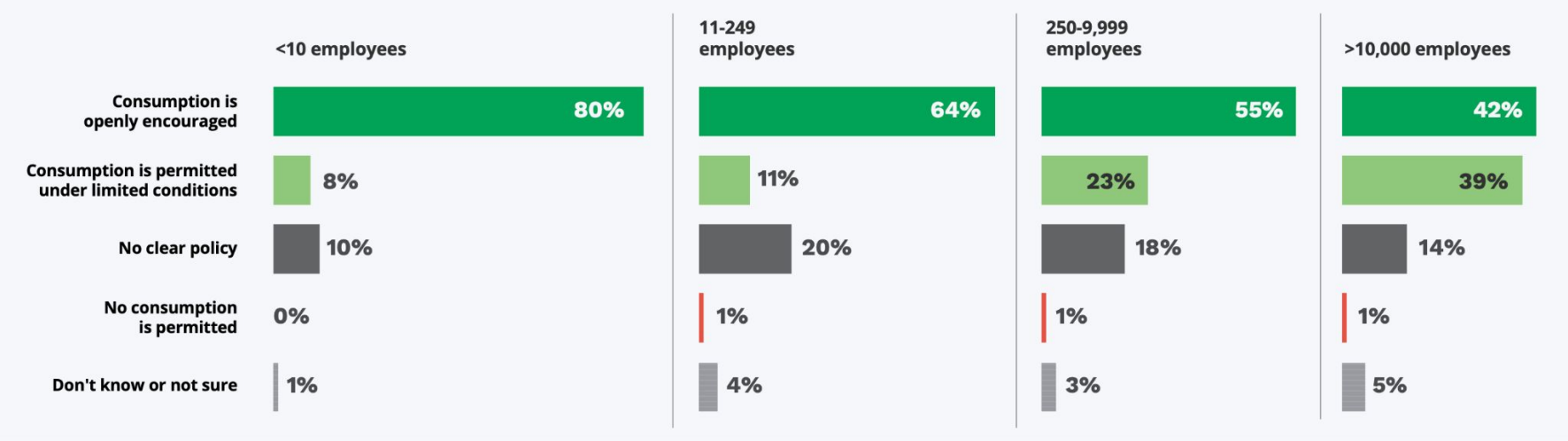
Qualitative Interviews:
16 interviews with experts from the public sector, private sector, and academia

Key Findings

Imbalance between Consumption and Contribution by Organisations

Consumption

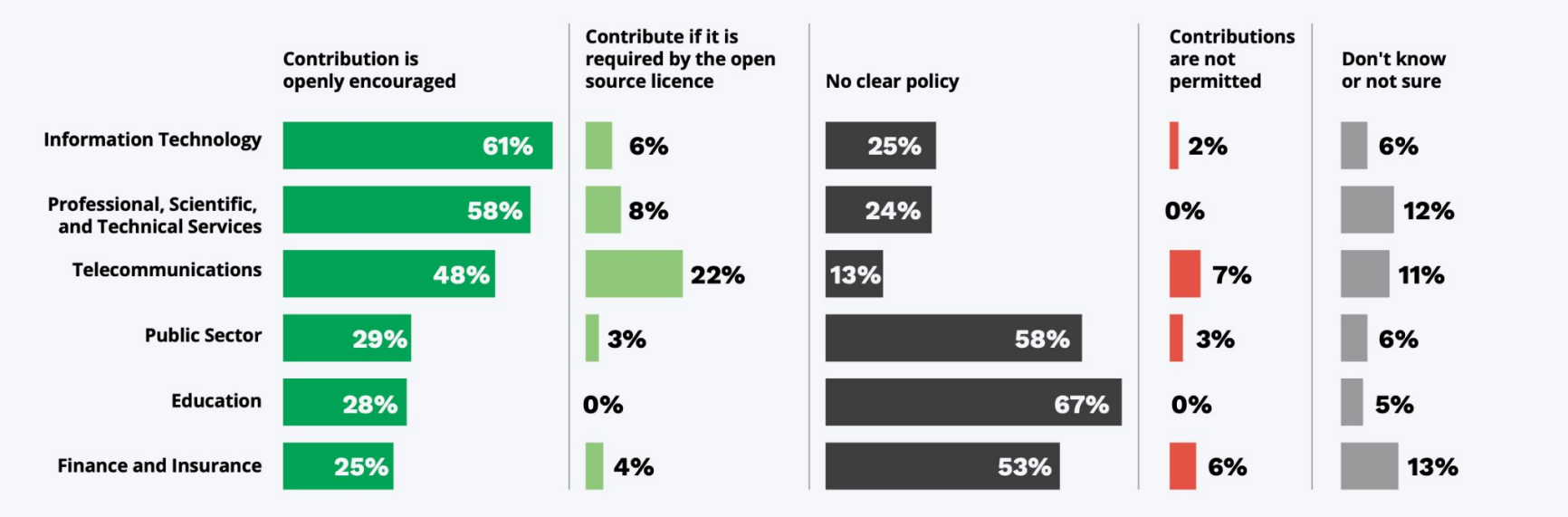
Comparison of the extent to which open source consumption is permitted at the respondents' organisations by organisation size.



Takeaway: Policies encourage open source consumption, but the bigger an org is, the more likely it is to attach limiting conditions.

Contribution

Variations in contribution policy based on the organisational sector.



Takeaway: The public, education, finance, and insurance sectors encourage contributions the least and mostly do not have policies. Result: orgs in these sectors tend to ‘take’ more than they ‘give’.

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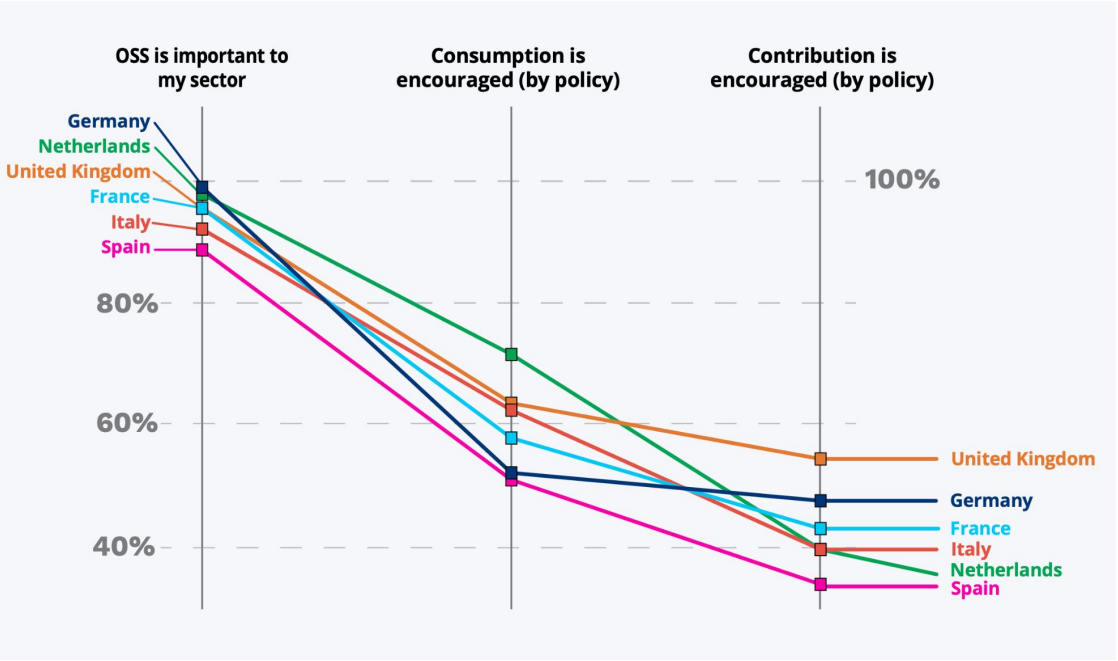
A view across Europe

The perceived importance of open source and how it flows into consumption and contribution in various European countries.



Consumption / contribution imbalance

Takeaway: There is an imbalance between contribution and consumption policies, with 43% reporting a lack of clear contribution policy, compared to 20% reporting a lack of clear consumption policy.

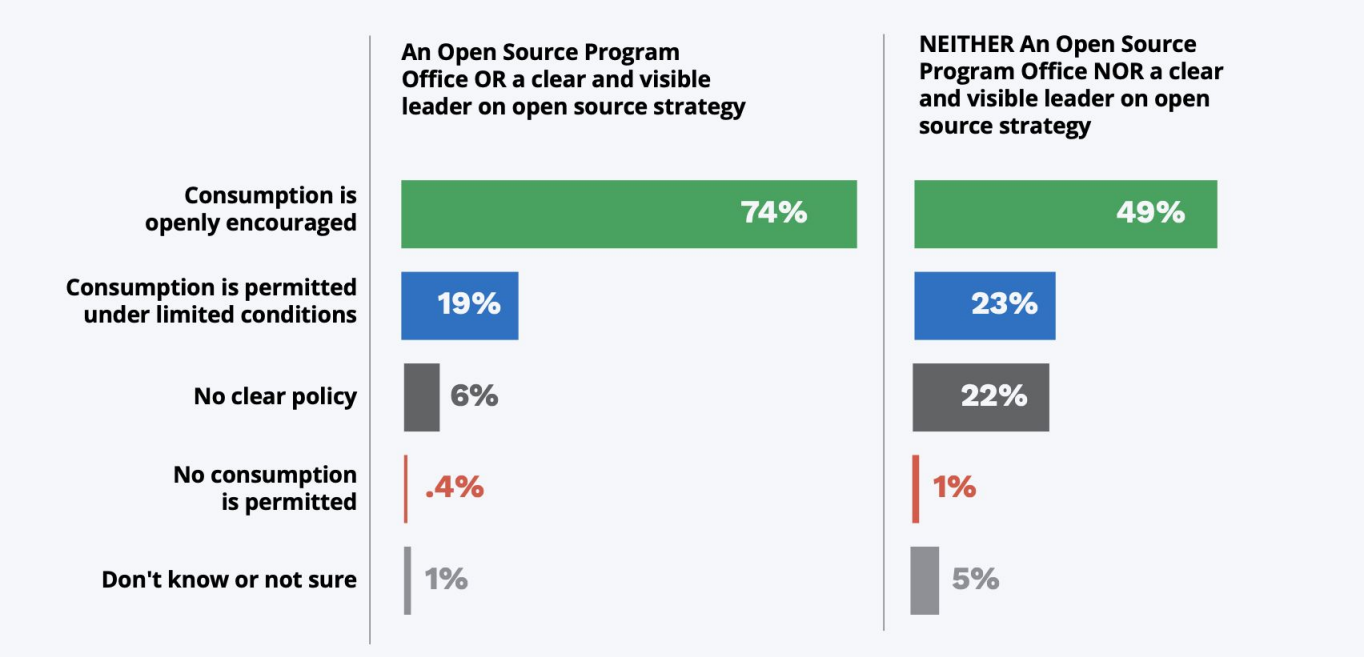
Impact of Leadership & Structured Approach to OSS within Orgs

Impact of Leadership & Structured Approach

- **Context:** The route to unlocking value from open source goes far beyond simply creating the right policies.
- **Finding:** Organisations with a structured approach to open source via an OSPO, or simply visible leaders, tend to have an organisational culture that encourages and empowers employees to contribute to open source.
- **Finding:** Organisations at the two extremes of the scale (<10 or >10,000 employees) tend to have an OSPO or visible leader, while mid-sized organisations tend to lack both.
- **Takeaway:** Clear leadership pays dividends, with micro- and enterprise-scale organisations leading the way on open source.

Open source leadership

Presence and permissiveness of a consumption policy at the respondent's organisation relative to the presence or absence of an OSPO and/or a clear and visible leader for an open source strategy.



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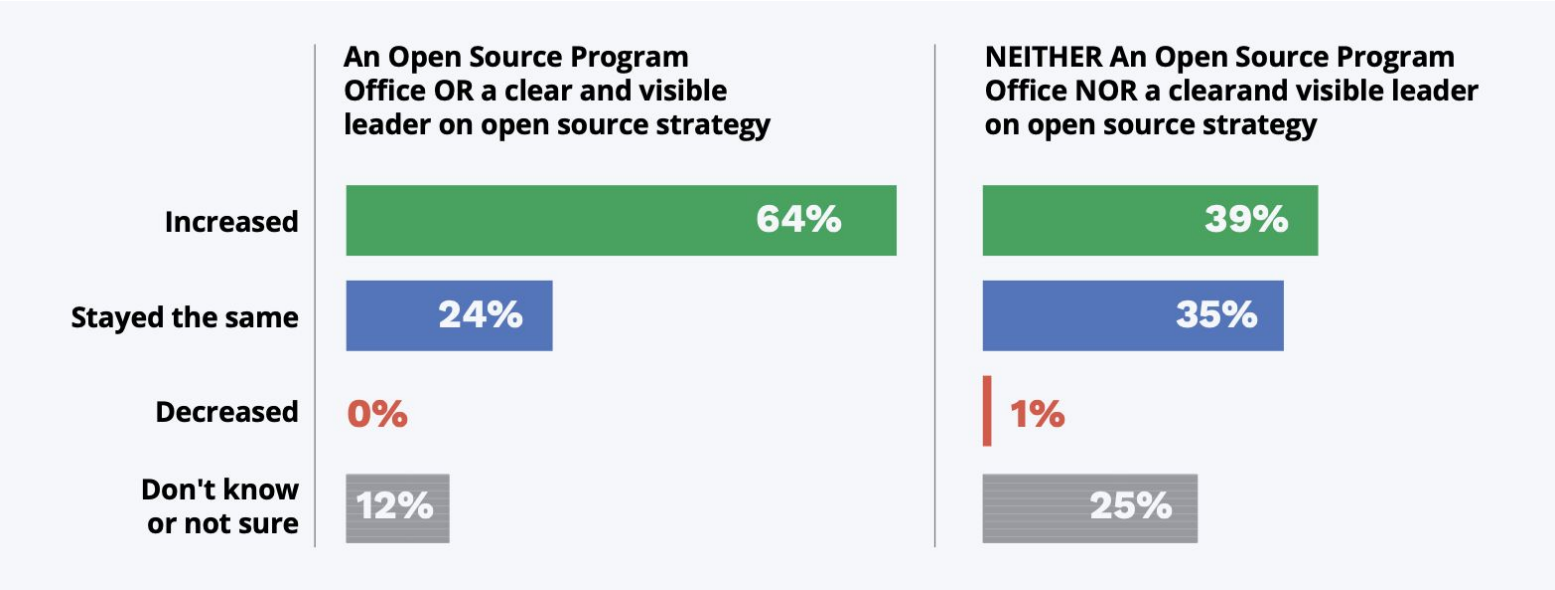
Open source leadership (continued)

Perceived change in the value derived from open source at the respondent's organisation relative to the presence or absence of an OSPO and/or a clear and visible leader for an open source strategy.



The Public Sector is Lagging Behind

The Public Sector is Lagging Behind

- **Progress:** Government bodies in Europe are increasingly prescribing open source consumption and sharing code in the open, primarily for transparency reasons.
- **But**: Limited inner source activity, which indicates a lack of collaboration within and between public sector organisations, and a lack of clear contribution policies, which potentially suggests an overly narrow appreciation of OSS's value as a mechanism for transparency rather than for collective value creation.
- **Takeaway:** With the public sector having so much to gain from open source, much needs to be done to create a cultural shift. Policies that simply mandate consumption and that 'code must be shared' miss out on much of the value that open source has to offer.

OSS Enables Digital Sovereignty

OSS Enables Digital Sovereignty

- **Context:** Digital sovereignty is high on political agendas across Europe. There is a clear need to create and sustain the mechanisms that will enable Europe to plot its own course in the digital world.
- **Findings:** Open source is a powerful mechanism for innovation, collective value creation, and ultimately bringing the vision of the ‘digital commons’ to life. There should be further investment in open source alternatives to technology monopolies.
- **Takeaway**: OSS can be an apolitical key to foster digital sovereignty. Open source drives value for all, breeds digital products and services that anyone can use, ensures space for constraint-free collaboration, and creates rich environments for skills and capability development.

Conclusions

Conclusions

- Organisations should address the imbalance between consumption and contribution through clear policies.
- Clear leadership and a structured approach (e.g. via OSPO) pays dividends, with micro-scale and enterprise-scale organisations leading the way on open source.
- The public sector is struggling to realise the value of open source for their citizens.
- Open source is a powerful mechanism for achieving digital sovereignty. Governments should invest in open source.

Read the report to find out more...

Next Steps

World of Open Source: Global Spotlight 2023

- Data will create Europe Spotlight 2023 report
- Focus on usage, contribution, and leadership
- Live until 30 June 2023
- Please take / distribute the survey!

OSS Activity in the Public Sector in Europe

- We are researching OSS activity in the public sector in Europe, from consumption to funding to contribution, with the intention of recommending ways in which the public sector can become a more active player in open source.
- We are covering a range of countries and government types, from local and municipal governments to national governments and intergovernmental bodies.
- **CALL TO ACTION:** Get in touch if you have any ideas you'd like to discuss: cosborne@contractor.linuxfoundation.org

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Thank you. Gracias.

Stay in touch!

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