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EDITORIAL

MEETING IN THE MIDDLE

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Few phrases appear together more often in technology news today than "open standards" and "open source." As often as not, these words are used by vendors and service providers in materials promoting their wares. In general, that's a good thing, because it indicates that the marketplace is associating value with open standards and open source software – a perception of value that vendors and service providers wish to borrow upon when they associate these phrases with their offerings.

But it's also a bad thing, for several reasons. One is that these phrases are too often used to describe tools and environments that are not actually "open," or that do not in fact achieve interoperability. The obvious danger arising from such loose usage is that confidence in open architectures and systems may be undermined.

But there is a second, and more difficult challenge to be addressed before the full potential of systems based upon open standards and open source software can be realized. That challenge is the fact that the relationship between open standards and open source software is still being negotiated, and I use that term advisedly. For example, many "open" interoperability standards are subject to the right of patent holders to require implementers to pay royalties and sign non-transferable licenses, thus rendering such standards unusable in open source settings. In consequence, standards subject to such restrictions are very much "not open" in the eyes of the open source community.

On the other hand, the open source community has not yet taken advantage of the value that open standards can provide for its own work product, where the absence of licensing terms that restrict rights to make derivative works enables the kind of "forking" of open source software that may greatly decrease its usefulness. The proliferation of such multiple variations of the same software may eventually lead to the capture of crucial open source software by proprietary vendors that create "sub brand" distributions. This can occur if such a distribution requires that other software needed by the end-user must be adapted to the requirements of the sub-brand. Once this occurs, that software may not be interoperable with other distributions, requiring costly re-licensing or patching if the customer wishes to later move to a different distribution.

The result of this kind of capture would be the type of "lock in" of customers on specific versions of open source software that already exists in the realm of proprietary software. Linux itself may be at risk of suffering just such a fate, given the fact that vendors are free to differentiate the distributions that they build around the same Linux kernel, and thereby encourage potential customers to buy their support services and add-on software. If end-users lose the option of making easy migrations from one Linux distribution to another, open Linux source software begins to look "not open" to those that create and use open standards. Ultimately, this could lead to a destructive replay of the "Unix Wars" of the recent past.

In an ideal world, every customer should be able to assemble an IT environment comprising whatever mix of open source and proprietary software and hardware it found to be most suited to its needs, and open standards would ensure that all of these elements would work together harmoniously. Moreover, that customer could swap new elements in and out of her systems without concern or costly patching, and ISVs could avoid costly porting to multiple platforms. Such an "open architecture" would dramatically decrease both the costs as well as the risks of ownership.

Today, much of the potential value of such open architectures remains both unrealized and at risk, although there are enough pieces in place to demonstrate the value of achieving such an interoperable nirvana. Ways need to be found to close the gaps that remain, so that customers can gain the cost, flexibility and other benefits of open source software while enjoying the range of product options and pervasive interoperability benefits that open standards can offer. Finding a way across the divide that in many ways separates the proponents of open source software from those that advocate open standards, however, will be challenging.

At the heart of the problem lie a number of seemingly insurmountable differences between open standards and open source: the first is the fact that standards describe certain attributes of things, whereas open source software is the thing itself. Another is the reality that open source is not only a thing, but also a set of strict licensing requirements, and these requirements are both more rigid as well as more demanding regarding the intellectual property rights (IPR) of technology developers than are those of traditional open standards. Yet another difficulty arises from the fact that one required open source licensing term guarantees the licensee the right to change the software in question in any way that the licensee wishes, while the value of open standards relies on requiring that the standardized aspects of the subject of the standard do not change at all.

As disparate, and even mutually exclusive, as some of these differences seem to be, there are ways to bridge the gap, if both the open source as well as the open standards communities are willing to work together. An example of such a successful collaboration can be found in the Free Standards Group, a standards development consortium that works in real-time with the Linux community to create standards to prevent the forking of Linux and other open source software. Each side voluntarily concedes a bit of freedom in order to achieve mutual goals, to the benefit of all.

In order to achieve the reality of open architectures, then, the following commitments are needed from both the open source and the open standards communities:

1. Each community needs to take the "must have" requirements of the other community's regime as a given.
2. Vendors must conclude that the value of the sales opportunities that they will gain from the proliferation of open architectures exceeds the economic value of the IPR that they agree not to assert.
3. Most importantly, both communities must enter into a spirit of partnership, based upon the realization that only through working together can the reality and promise of pervasive open architectures be achieved.

The benefits of such a partnership are clear. It's time that proactive, visionary leaders on both sides of the open source – open standards divide begin building bridges across that gulf, so that together they can create the open architectures of the future.

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