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STANDARDS BLOG:

ODF vs. OOXML: War of the Words (an eBook in Process)

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For some time I've been considering writing a book about what has become a standards war of truly epic proportions. I refer, of course, to the ongoing, ever expanding, still escalating conflict between ODF and OOXML, a battle that is playing out across five continents and in both the halls of government and the marketplace alike. And, needless to say, at countless blogs and news sites all the Web over as well.

Arrayed on one side or the other, either in the forefront of battle or behind the scenes, are most of the major IT vendors of our time. And at the center of the conflict is Microsoft, the most successful software vendor of all time, faced with the first significant challenge ever to one of its core businesses and profit centers – its flagship Office productivity suite.

The story has other notable features as well: ODF is the first IT standard to be taken up as a popular cause, and also represents the first "cross over" standards issue that has attracted the broad support of the open source community. Then there are the societal dimensions: open formats are needed to safeguard our culture and our history from oblivion. And when implemented in open source software and deployed on Linux-based systems (not to mention One Laptop Per Child computers), the benefits and opportunities of IT become more available to those throughout the third world.

There is little question, I think, that regardless of where and how this saga ends, it will be studied in business schools and by economists for decades to come. What they will conclude will depend in part upon the materials we leave behind for them to examine. That's one of the reasons I'm launching this effort now, as a publicly posted eBook in progress, rather than waiting until some indefinite point in the future when the players in this drama have been colored by the passage of time and the influence of later events.

My hope is that those of you who have played or are now playing a part in the ODF vs. OOXML story will supplement or correct what I'm writing by sharing your facts and insights, either by posting your comments publicly at this blog, or by contacting me privately me via email. My goal will be to present what happened as completely, accurately and readably as I can, so I hope that those on both sides of the fence will work with me. In all cases, I will try and fairly incorporate what you offer into the whole.

My second goal is to help those that have come to this story late in the day – halfway through the movie, as it were - learn what happened prior to when you entered the theater. That way, you'll be better able to put current events into context as they happen, understand the cast of characters more fully as they continue to play their parts, and above all, appreciate the nuances of the still unfolding plot.

So without further ado, here is the first chapter of a book whose total length will be determined by events yet to unfold, whose ultimate print publisher is yet to be found, and which for now bears the working title of "War of the Words."

Chapter 1: Out of Nowhere

On September 1, 2005, a New York-based writer for the London *Financial Times* named Richard Waters wrote a brief article, posting it to the Web via FT.com's San Francisco office. The seemingly unremarkable subject of the piece was the release of a new draft of a procurement guideline by the Information Technology Division (ITD) of the Commonwealth of Massachusetts' procurement of new technology. Some of the data points in the article were wide of the mark (he referred to Massachusetts as "one of the most populous states in the US" for example), but this was fitting for a story that would circle the world for years to come, as often as not unencumbered by facts inconsistent with the spin *du jour*.

What elevated the story from a space filler in the business section to a hot property was the news that the ITD planned to banish Microsoft's Office software suite from 50,000 government computers. If the ITD had its way, 28 Executive Agencies would no longer use Word to create documents, Excel to plot spreadsheets, or PowerPoint to craft presentations. Instead, government employees would be required to use software that saved documents in "open formats" - which Office did not, according to the ITD's definition. Moreover, Microsoft claimed that it had been taken by surprise by the decision (a claim the ITD later denied); Waters rubbed salt in the wound by describing the event as "one of the most significant setbacks" for Microsoft in the US market.

Only the FT.com site carried the story at first. But word of the defection of this large Microsoft customer spread quickly via the Internet, in large part because of the abundance of blogs and amateur news sites that focus on technology stories, but also because so many of the people who write for and visit these sites are hostile to Microsoft. Soon, visitors with strange on-line aliases like *SpaceLifeForm*, *Sammy the Snake* and *Cybervegan* were posting gleeful comments at the expense of the software vendor, and trying to learn more about what "open formats" might be, and why they were so important.

The decision makers in Massachusetts were Peter Quinn, the state's Chief Information Officer (CIO), and his boss, Secretary of Administration and Finance Eric Kriss. There were good reasons why they wanted to convert to software capable of saving documents using open formats. One was so that citizens could exchange documents with the State no matter what software they chose to use. As things currently stood, someone in Massachusetts would need to invest in a copy of Office before it could download a document electronically from a state government site.

But an even more important motivation arose from the fact that Massachusetts, like governments everywhere, was rapidly moving towards a future where public records in paper form would cease to exist. Soon, government archives would exclusively comprise documents in electronic form, stored in vast banks of servers or on magnetic media. After thousands of years, traditional hard copy documents were destined to follow the path earlier taken by musical recordings, which in the course of a hundred years had already passed from wax, to vinyl, to tape, to optical disk media, eventually to slip the surly bonds of discrete physical storage media entirely and be reborn as electronic files. These files were recorded in formats of their own, with interesting names like **Ogg Vorbis**, or more prosaic ones, like **MP3** (both open formats), as well as the proprietary formats that Apple uses to create its popular iTunes.

Each time one of these new storage formats (physical and then virtual) had came along, the old one became obsolete. Within a matter of years, new music couldn't be purchased in the old format at all. Anyone that wanted to upgrade their equipment while preserving their existing investment in the old format needed to keep their old player in good repair, or else laboriously transfer their old albums, song by song, to the new format, losing fidelity in the process. Once word processors, each using a proprietary format (Word, WordPerfect and so on), replaced typewriters governments, businesses and individuals faced a repeat of the same experience. Most had already faced at least one such conversion, typically moving from WordPerfect to Microsoft's Office, after the latter product became dominant in the marketplace.

Governments that now wished to digitize the millions of hard copy documents lying in their archives faced a far greater challenge due to the sheer size of the task. And they also felt a greater responsibility as well. Simply put, Massachusetts wanted to be sure that in five, ten or a hundred years it would be able to access those digitized documents using whatever equipment was then available, rather than having to dust off the equivalent of an eight track tape player – if it could find one.

Waters may have used a bit of hyperbole to inflate the commercial importance of Massachusetts in his Financial Times article, but his calibration of the threat that the Massachusetts decision presented to Microsoft was right on the money. Indeed, Microsoft was already deploying its considerable resources to take all actions necessary to bring about a reversal of the ITD's decision, if at all possible, and to blunt the market impact of the decision otherwise.

The reason lay not so much in the potential loss of revenue from this large customer, but in the dramatic increase in credibility that the announcement gave to the importance of open formats. Microsoft owned more than 90% of the global marketplace for office suite software, and had worked long and hard to achieve that enviable position. Some 400 million customers used Office, and it wasn't likely that Microsoft would lose them, so long as software utilized "closed" formats controlled by individual vendors. While that state of affairs continued, most customers would remain trapped by the billions of documents they had already created. Opening, converting and resaving those documents using the software of any other vendor would be difficult, time consuming and expensive. In the words of economists, these customers were safely "locked in."

But now an open format standard was available that promised to liberate users from lock in to Office for life. And a high-profile customer had announced that it was leaving the pack to adopt it. For the first time, there was a breach in Microsoft's outer defenses. In response, the vendor was marshalling all of the forces at its disposal to contain the threat before it could spread.

Next installment: *Products, Innovation and Market Share*

Read all chapters of *War of the Words* at:
http://www.consortiuminfo.org/standardsblog/index.php?topic=20071125145019553

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