Global Implementation Plan

IDABC Open Source Observatory and Repository

OSOR

1 Context

<table>
<thead>
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<th>Type of action</th>
<th>HM – Horizontal measure</th>
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<tr>
<td>Sectoral legal basis</td>
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</tr>
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<td>Relation to the Action</td>
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</tr>
<tr>
<td>IDABC Legal Basis</td>
<td>Decision 2004/387/EC, Article 5 and Annex II B(r)</td>
</tr>
<tr>
<td>Service in charge</td>
<td>DIGIT.01</td>
</tr>
<tr>
<td>Associated service</td>
<td>INFSO</td>
</tr>
<tr>
<td></td>
<td>DIGIT.A.3.OADS</td>
</tr>
<tr>
<td>Responsible action manager</td>
<td>HELD Barbara</td>
</tr>
<tr>
<td>Committee / group of experts</td>
<td>PEGSCO/ IDABC Technical Working Group, IDABC group of OSS experts</td>
</tr>
<tr>
<td>GIP status</td>
<td>New GIP</td>
</tr>
</tbody>
</table>
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2 Objectives

This project aims to encourage the re-use of publicly-financed FLOSS (free, libre, open source software, in the IDABC context used synonymously with open source software or OSS) developments or FLOSS developments specifically targeting public sector requirements and its deployment by putting in place a European FLOSS repository (OSOR). To that purpose the OSOR will provide platform and support for cross-border collaboration on IT-solutions for public administrations. Modelled after well-known sites such as SourceForge that host developers' communities around projects, the European FLOSS repository would host European financed applications but would also be open to hosting eGovernment applications generally. It would also provide access to national repositories since the purpose of this action is to encourage the emergence of a federation of national FLOSS repositories rather than to implement a unique source for such software.

3 Rationale

The public sector is, and will be, playing a leading role in the promotion of FLOSS. In addition to economic incentives, attractiveness is reinforced by strategic incentives: more competition in the market, support of open standards, improved quality of code, further innovation through open collaboration and sharing of knowledge.

Although the use of FLOSS in the public sector is ever increasing, the production and sharing is still marginal. Therefore, a “neutral” European meeting point is convenient. It should be complementary to existing national initiatives (providing them with increased visibility, accessibility, etc.), and explicitly avoid competition with them. In addition, the service will be useful for developing synergies between local, regional and national initiatives, and for reducing issues related to effort duplication.

Finally, a specific service for the active promotion of synergies and interaction between public sector, developer communities, users and supporting businesses will be provided for.

4 Scope

The scope of the OSOR is to support sharing of FLOSS related experiences and knowledge among European public administrations and their partners. The OSOR services and content will focus on software and applications that are of specific interest for public administrations.

Main aspects to be covered by the OSOR are:

- Provide information and guidance on the use of FLOSS in public sector.
- Allow to find and retrieve information and software relevant for public administrations of all levels across Europe.
- Provide infrastructure and guidance for collaboration on FLOSS projects.
- Identify and support opportunities for cross-border collaboration.

The project will build on the Open Source Observatory’s work to establish an inventory of FLOSS applications. It will also take into considerations the recommendations of the 2002 study on pooling FLOSS (see http://europa.eu.int/idabc/en/document/2623/5585) and other IDA II studies.
5 Technical functionalities and approach

The OSOR is planned to become a relevant FLOSS platform in Europe oriented towards public administrations. It will link up a European network of FLOSS repositories, provide some central facilities for sharing FLOSS solutions with a certain level of assurances (regarding the quality of their technical implementation and the strength of the user and developer communities), and help the spread of good practice in the usage of FLOSS applications.

The service will combine information, a repository and a collaborative environment for uploading, downloading, developing and promoting FLOSS of interest for Public Administrations.

The repository will be presented as an Internet site for sharing software between European public administrations, third parties and general users, while the collaborative environment will provide a set of tools for helping in the development and coordination of software projects of interest for European public administrations.

In addition to technical development and web site content management, the OSOR will provide continuous networking activities (facilitating synergies) that increases the need for resources in the starting phase.

5.1 Generic Description

Three complementary domains of activity have been identified for OSOR, as specified in chapter 3 of the “Feasibility Study”:

- An Information platform as an extension of the current IDABC Open Source Observatory (OSO). This includes news, events and newsletters, cases studies and advices (both legal and strategic). In addition, it provides also guidelines that must be more practical and modulated according to the various target groups and situations: “You are a...” (public sector internet user, developer, strategic adviser, member of the legal services) in order to develop a knowledge tree adapted to the various situations and providing supporting material (license contracts as the GPL or the EUPL, examples of regulations, consortium contracts etc.). The activities for the information platform will be covered by the IDABC action “Dissemination of Good Practice in Open Source Software”.

- A repository (including a catalogue) and focus point to provide visibility to all relevant initiatives in Europe, allowing users to upload and download contributions, facilitate mutual access to existing projects through a multi-lingual taxonomy and therefore multiply chances to develop exchanges, re-usability, community building and therefore perennial character of launched projects. Such dedicated focus point should provide open informative space and visibility for OSOR partner’s projects.

- A collaborative environment to develop and share/exchange experience and software where necessary, including a “forge”, facilities for the collaborative creation of content related to the OSOR, mechanisms to put public administration in contact through a common OSOR user group, forums and collaborative development, the facilitation for specialised improvements, software localisation or certification, a support for the development of ecosystems around public sector software (support, other services).

The system will be monitored based on the number of hosted projects, number of informative pages (news, cases, papers etc.), the number of volunteer contribution. Beyond the implementation phase,
a website statistic program will monitor the activity (number of hits, visits, MB information downloaded). A specific report on registered users and successful software downloads (achieving the licensing agreement process) will monitor the productivity.

More details on the functionalities offered by the OSOR and on the architecture (hardware, software and networking) to support it can be found in chapter 6, “Technical Options” of the “Feasibility Study”, as Option C. A complete list of hardware and software is available there. In addition, during the OSOR design and implementation phases a complete “Use Cases” specification and a corresponding Detailed Layout Design” will be elaborated.

5.2 Complementary community support service

The success of the OSOR will depend on the contributions it will get from its stakeholders. Therefore, it is foreseen to provide facilities for interaction and support for collaboration in its context:

- General advice and guidance for working in collaborative environments.
- Consultancy to projects hosts in the OSOR, including content providers
- Initiate synergies through publications, workshops, etc. In particular, coordination with similar initiatives throughout Europe.
- Support consultation and communication of stakeholders among themselves and with the OSOR itself, by providing platforms for the OSOR user communities.

An active support of the OSOR user communities (motivating potential partners and public administrations in Member States to collaborate actively on OSOR, and providing them different kinds of support for better fulfilling their goals) will be performed during the OSOR web site development and afterwards.

6 Participants and benefits anticipated

6.1 Participants, roles and tasks

<table>
<thead>
<tr>
<th>Main participants:</th>
<th>Role</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>European Commission – IDABC</td>
<td>Sponsor / Service provider</td>
<td>Administration and management of the OSOR.</td>
</tr>
<tr>
<td>Other European Commission Services</td>
<td>Contributors and users</td>
<td>Providing content and software</td>
</tr>
<tr>
<td>Member States public administrations</td>
<td>Contributors and users</td>
<td>Providing content and software</td>
</tr>
<tr>
<td>Other FLOSS-related initiatives (e.g. Member States repositories)</td>
<td>Contributors and disseminators</td>
<td>Depending on agreements with the OSOR</td>
</tr>
<tr>
<td>Members of (hosted) community projects</td>
<td>Contributors</td>
<td>Providing content and</td>
</tr>
</tbody>
</table>
### Framework contract ENTR/05/066/IDABC/OSOR

IDABC Open Source Observatory and Repository (OSOR)

<table>
<thead>
<tr>
<th>Main participants:</th>
<th>Role</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>and users</td>
<td>software</td>
</tr>
<tr>
<td>Businesses</td>
<td>Users and eventually</td>
<td>Depending on OSOR policy and needs</td>
</tr>
<tr>
<td></td>
<td>contributors</td>
<td></td>
</tr>
<tr>
<td>Citizens</td>
<td>Users and eventually</td>
<td>Depending on their specific needs</td>
</tr>
<tr>
<td></td>
<td>contributors</td>
<td></td>
</tr>
</tbody>
</table>

#### 6.2 Benefits anticipated

**Benefits**

Hereunder, the possible anticipated benefits:

<table>
<thead>
<tr>
<th>For the agency/sector</th>
<th>Realise objectives of collaboration and resource sharing between PA in Europe (i2010)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>One stop shop to know and understand European FLOSS initiatives</td>
</tr>
<tr>
<td>For MS administrations</td>
<td>Share best practices with other EU public administrations</td>
</tr>
<tr>
<td></td>
<td>Decrease the costs by using already available applications fitting with their</td>
</tr>
<tr>
<td></td>
<td>requirements</td>
</tr>
<tr>
<td></td>
<td>Improve the quality of the software they develop by using solutions already</td>
</tr>
<tr>
<td></td>
<td>deployed</td>
</tr>
<tr>
<td></td>
<td>Improve their image of “eGovernment excellence” on a trusted pan-European</td>
</tr>
<tr>
<td></td>
<td>platform owned by public sector.</td>
</tr>
<tr>
<td>For enterprises and</td>
<td>Open the market to new participants and further fair competition.</td>
</tr>
<tr>
<td>third party entities</td>
<td>Increase their visibility in Europe by alimenting the collaborative environment.</td>
</tr>
<tr>
<td></td>
<td>Information and transparency about projects in public administrations.</td>
</tr>
<tr>
<td>For citizens</td>
<td>Improved services by public administrations, and better cost-benefit ratio</td>
</tr>
<tr>
<td></td>
<td>thanks to reuse, pooling of resources and collaborative approaches to IT services</td>
</tr>
<tr>
<td></td>
<td>by public administrations.</td>
</tr>
<tr>
<td></td>
<td>Point of reference for FLOSS of potential interest.</td>
</tr>
</tbody>
</table>
Benefits for other entities

| Benefits for other entities | OSOR will highlight solutions from European Public sector as “eGovernment Best Practices”. This should benefit to EU candidates and to Non-EU countries (Mediterranean, Africa etc.) in the framework of multi-lateral collaborations |

*Table 1 Possible anticipated benefits of the OSOR*

### 6.3 Support group

This action is supported by the IDABC group of OSS experts. Further support is expected from stakeholders like Member States repositories, FLOSS community projects and FLOSS initiatives.

### 7 Information processes

The OSOR will be a public platform, providing facilities for content management as well as services for community interaction and animation. This platform will contain two kinds of content:

- Content provided by the European Commission
- Content provided by third parties (Member States administrations, FLOSS developers, etc.)

The project management will be carried out in CIRCA.

### 8 Organisational developments and re-engineering of working processes

For the new services in the OSOR, there is no need of re-engineering existing working processes: in its initial phases the OSOR operation will be mainly based on volunteer contributions rather than legal obligation.

The only previously existing services provided by OSOR will be those currently provided by the OSO. Those services will be integrated and merged in the OSOR during the initial phase of OSOR development, with the appropriate re-engineering of processes when needed.

Once the OSOR is operational, it is foreseen to establish quality management procedures for the certification of content produced by third parties, in close consultation with the Member States.

### 9 Horizontal Pan-European e-Government and Infrastructure Services

#### 9.1 Services to be used

This action makes use of the work and the results achieved under the IDA II programme for the preparation of the European Interoperability Framework. It is based on IDA outcomes (POSS study, OSO case studies and advices), it will be used as repository for IDABC produced software and knowledge when decided (CIRCAbc, eLink, IPM...) for the distribution which it will use the EUPL. This licence will be promoted for Member States' PA Open Source applications.
For the security evaluation the IDABC self-assessment tool on the matter is used (see chapter 13 of this GIP).

No other major infrastructure services are required. The Repository will have its own infrastructure as result of integration with good practices stated in the European Interoperability Framework. The OSOR as a whole will be use also any new versions of the European Interoperability Framework, and other related guidelines that may be developed by IDABC in the future.

### 9.2 Services that could be developed

The OSOR experience of “mixing” inputs from various contributors on a pan-European service build on 100% open source “out of the box” components could be used as model for other similar “knowledge sharing” that the Commission will implement to increase its interaction and communication with other administrations, citizens and enterprises.

### 10 Costs and milestones

#### 10.1 Breakdown of costs and related milestones

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description of milestones reached or to be reached</th>
<th>Cost (Euro)</th>
<th>Start date (QX/YYYY)</th>
<th>End date (QX/YYYY)</th>
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<tbody>
<tr>
<td>D</td>
<td>Development of prototype.</td>
<td>1,100,000</td>
<td>Q4/2007</td>
<td>Q4/2008</td>
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<tr>
<td></td>
<td>Workshops with OSOR stakeholders, partners and experts (budget from action 5.3 dissemination activities)</td>
<td>0</td>
<td>Q3/2007</td>
<td>Q4/2009</td>
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</table>

*Table 2 Financial figures for the Collaborative Development Environment and Repository. A detailed description of “Development of prototype” and “Implementation” phases is available in the work plan section.*

#### 10.2 Breakdown of costs to be funded by IDABC by budget year

The following table lists the expected IDABC funding per year, according to the work plan in section 14.

<table>
<thead>
<tr>
<th>Budget year</th>
<th>IDABC Funding</th>
</tr>
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<tbody>
<tr>
<td>2007</td>
<td>1,100,000</td>
</tr>
<tr>
<td>Budget year</td>
<td>IDABC Funding</td>
</tr>
<tr>
<td>------------</td>
<td>--------------</td>
</tr>
<tr>
<td>2008</td>
<td>200,000</td>
</tr>
<tr>
<td>2009</td>
<td>300,000</td>
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</table>

Table 3 Costs to be Funded by IDABC by Budget Year

10.3 Return on investment

There are expected benefits already mentioned in other chapters (see section 6.2). A long term return on investment for the European Community is expected to be generated through the reusability of code and a rise in efficiency in producing code in collaborative projects.

A detailed RoI analysis is not possible up front before the project starts, because of the lack of data that is mostly due to innovative character of the project. The real value of the platform will highly depend on the contribution of its users in the Member States that will contribute to enriching the platform through content and code. It will also depend on the volume and nature of the reuse of code and the productivity of the collaborative projects on the platform.

In order to provide further measurable indicators for success, the Commission will define targets regarding the usage of the platform by stakeholders that are connected to project milestones (e.g. at least five projects in the platform, 50 in the repository after one year development phase). The usage of OSOR and its services will be measured in regards to visitors and quantities of data that are up- and downloaded - as indicators of increased collaboration and reuse. In addition, numbers, types, complexity and reuse of code and documentation in the OSOR will be monitored over time to assess "investments" provided by third parties and "benefits" for (re-)users. The OSOR will systematically monitor the development and report on the progress made.

10.4 Additional Success Factors

As stated above, the involvement of Member States is a success factor of paramount importance. The Commission will therefore define project milestones that are not connected to financial investments, but to the active involvement of stakeholders in Member States. The first of these milestones is the formation of a collaborative network with existing OSS repositories in the Member States: At least five repositories shall have joined the group, when the OSOR prototype goes on line end of June 2008. Further milestones will be defined in consultation with Member States in the early phases of the project.

11 Financial sustainability

The measure is funded under the IDABC Programme according to the disposition of Article 10. In particular, as this measure is an infrastructure service, the disposition of Article 10 (8) of the IDABC Decision applies.

As other operational IDABC infrastructure measures, the action will be funded by the Commission on a common budget line, subject to the agreement of the budget authorities of the Community and the Member States.

Once the OSOR is operational, cost sharing options for specific services will assessed and discussed.
with Member States.

12 Multilingual communication
The services will be built using software with multilingual capabilities:

- The selected web portal and other user interfaces will have multilingual capabilities. The base language for the user interface will be English. For the user interfaces (menus, navigation, etc.) maybe some other languages will be supported if needed later on. It is foreseen to allow content in all official languages of the EU. Facilities for translation of content by third parties will also be provided.

- Synergies with public administrations and other users will be sought in order to foster collaborations in translating hosted software and documentation to EU languages.

13 Security
The measures proposed in this section are based on the outcome of the IDABC security self-assessment tool and the corresponding questionnaire, available at http://ec.europa.eu/idabc/servlets/Doc?id=18206

13.1 Security Policy
The system will have the enough security measures to guarantee its own integrity and the privacy of stored data, such as firewall protection, restricted shell access and other. The intrusion prevention plan will detail these security measures and the actions to be taken when suspicious activities are detected.

In any case, the system will not store other personal data than those based in user inputs, such as required information for having an account in the system (an e-mail and a password).

13.2 Organisational Policy
The risk assessment and security requirements will be detailed in a specific RUP deliverable. While OSOR is base in “open information” certain information flows (web administrator, moderators, hosted project owners, etc.) will be depending on user authentication. This will stay based on ID-Password checks.

13.3 Asset Classification and Control
Access to specific projects will be controlled (on project responsible request), however the system will not be used for exchanging EU classified information or information subject to privacy regulation.

13.4 Personnel Security
System administrators will have a contingency plan for security and malfunction incidents.
13.5 **Physical and Environmental Security**

The system will be hosted in a data center with physical guarantees against natural disasters and unauthorized access.

13.6 **Communications and Operations Management**

Procedures for network and system operation, as well as contingency plans will be designed to minimize problems and assure system maintenance over software security and faults.

13.7 **Access Control**

The system will be a publicly available platform where all people could access (simple visits). Accesses for uploading / contributing / modifying content (including software), to specific hosted projects functionality, or to specific tasks such as remote access to back-end systems, will be limited to authorised persons (i.e. the members of a hosted projects or the system administrators).

13.8 **Systems Development and Maintenance**

A development and system' administrators team will maintain the software, fixing functional and security errors.

13.9 **Business Continuity Management**

Contingency plan will cover physical and logical malfunctions to have a fast response (recovery action) and protect critical processes, if any.

13.10 **Compliance**

The system will have the technical measures needed to guarantee all legal requirements and audits.

14 **Work plan**

14.1 **Development phase**

This phase consists of the development of a fully functional prototype of the OSOR, including technical infrastructure, content, and community support. The OSOR prototype in its final version will host a number projects and an active community of users which will be used for checking and fine-tuning the site. The prototype will be fully operational (both in technical, organizational and community terms) and ready to enter into full operation. It will also include a complete migration of the services of the IDABC Open Source Observatory (OSO).

For practical purposes, the phase has been split in two subphases:

- Inception and elaboration (months 1-6). Refining architecture, design, development of content collection and management, delivery and validation of a working prototype. Main activities of this sub-phase will be:
o Setting up the governance and organizational infrastructure of the OSOR (rules for participation, IPR policy, quality management, language policy, etc.)
o Setting up the basic technical platform, including forge and repository. Hardware, basic software and hosting/networking set-up and configuration, as well as complete and detailed description of the core functionality and services of the OSOR, and its technical implementation.
o Migration of the OSO functionalities and recent/relevant content (considering potential synergies with the ePractice platform).
o Agreeing with selected stakeholders on a (first) taxonomy for the repository. Setting up a base population for the repository/registry.
o Establish and keep steady contact with stakeholders (e.g, other repositories and OSS communities)

- Construction and maintenance. Building and improving the OSOR prototype in an iterative way in consultation with the stakeholders, launching the service, delivering the documentation, software and code. Main activities of this sub-phase will be:
o Providing guidelines – in close consultation with stakeholders (via GPOSS)
o Collecting further content for the repository
o Refining the documentation and supporting content
o Refining and upgrading the technical platform, including new functionality when needed.
o Hardware, software and hosting/networking maintenance
o Populating the collaborative platform.
o Providing consultancy to OSOR projects.
o Establish and keep regular contact with stakeholders (e.g, other repositories and OSS communities)

Expected outcome of this phase:

At this point, the system is ready for permanent mode. A first complete implementation of the core system available for users, including most of the content to be produced by the contractors (in first version). Contacts, plans and implementation of the migration of a significant number of selected projects complete. Hosted projects are expected to be working normally. Content produced by third parties (including translations) starting to be present. Activities for community support will already be in place. The OSO service is fully migrated to the OSOR platform.

14.2 Implementation phase (2008-2009)

Full operation of the site and related services with extended communities and full publicity, and normal operation of the site and related services:

- Refining and adapting guidelines, in accordance with OSOR stakeholders.
- Work with OSOR projects to identify and provide the services they need (including adding
new functionality to the platform, when needed)

- Improving and completing content in the repository
- Adapting technical functionalities to developers needs
- Hardware, software and hosting/networking maintenance

Expected outcome of this phase:

System in permanent mode, with all checks and fine tuning after experience with regular operation. Publicity of the platform for third parties. Implementation of services detected after interaction with early users.

15 Annexes

15.1 Preparatory report (PR) and global implementation plan (GIP) annexes

This GIP complement the OSOR feasibility study – which can be used as a preparatory report that provide input for the design and the related annexes.

15.2 Supplementary documents

- Feasibility study (final draft)
- Annex to the feasibility study: Repository and collaborative sites
- Annex to the feasibility study: CMS Software
- Annex to the feasibility study: Technical options
- Annex to the feasibility study: OSOR implementation budgets
- Annex to the feasibility study: European Commission – Projects of common interest