CHOReVOLUTION

H2020 ICT9 Project

Deliverable D7.2

Community Building Plan v1

http://www.chorevolution.eu

THALES

SWEDISH ICT VIKTORIA

OW2

CEFRIEL FORGING INNOVATION

Inria — informatics mathematics

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Universita' dell'Aquila

tirasa

HORIZON 2020 — THE FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION

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Abstract

This document describes the CHOReVOLUTION community building plan structure. It describes the open source strategy and the three-stage approach for building the project community. The actions undertaken at each stage will foster collaboration between the members of the consortium, open source communities, related projects and a broad business ecosystem. This plan will also contribute to scientific, industrial and open source dissemination.

Keyword list

CHOReVOLUTION, middleware, choreographies, synthesis, IT, cloud, interface, web, development, integration, platform, services, community, conference, workshop, webinar, standards, social network, open source, OSS, FLOSS, Synthesis Processor, Enactment Engine, Enterprise Service Bus, Identity Manager.

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Glossary, acronyms & abbreviations

Item	Description
CA	Consortium Agreement
DL	Deliverable Leader
DOW	Description of Work
EPL	Eclipse Public License
IAC	Industrial Advisory Committee
IP	Intellectual Property
LGPL	GNU Lesser General Public License
OCSi	OW2 Open Source Software initiative
OSS	Open Source Software
PL	Project Leader
PMC	Project Management Committee
PO	Project Officer
PTC	Project Technical Committee
SL	Scientific Leader
SQuAT	Software Quality Assurance and Trustworthiness
WP	Work Package
WPL	Work Package Leader

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1. Introduction

This report presents the CHOReVOLUTION Community Building Plan, one of the key initiative of the project to ease the transition from lab to market. It provides general principles driving community development effort, including the open source strategy and marketing services to support the CHOReVOLUTION Platform. Then, it details the actions taken during the first six months of the project to develop the community.

2. The Community Building Plan

2.1. The objectives

The community building plan aims at extending the project value toward both open source software integrators and business users. It relies on a combination of infrastructure services, governance services and marketing services to be implemented during the duration of the project. That combination should provide project results sustainability.

The proposed services will escort the software results of the project from lab to market. They will ease the use of CHOReVOLUTION technologies in the industry. And they will foster the pursuit of open source development activity beyond the three years of the project.

The figure bellow summarizes the objectives of the project, underlining the support role of the community with regards to the integration platform:
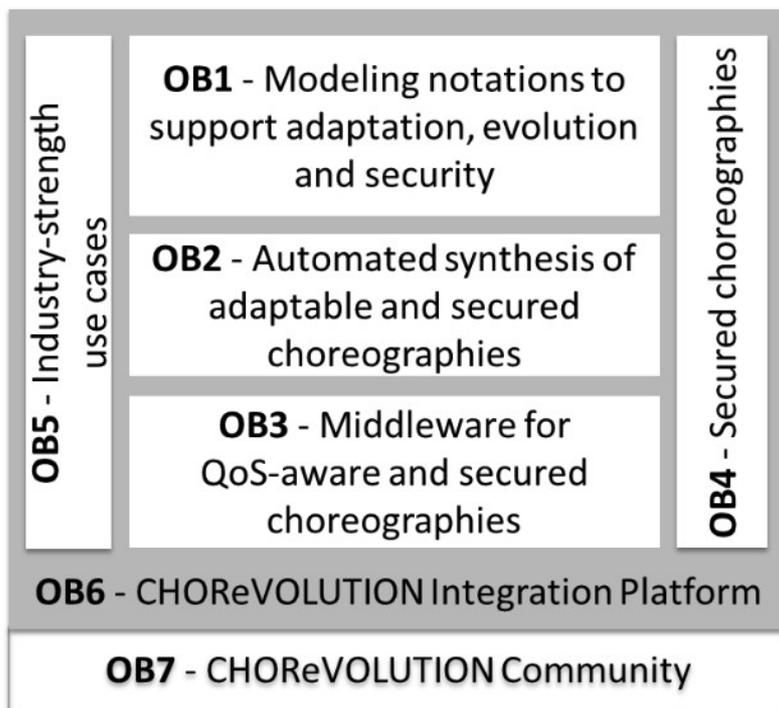

Figure 1: CHOReVOLUTION Research & Innovation objectives

2.2. A three-stage approach

The CHOReVOLUTION community building plan builds on the lessons learned during the CHOREOS project and leverages the concept of "business ecosystem platform". In our understanding, a business ecosystem platform provides three categories of services:

- **Infrastructure Services:** the business ecosystem platform is a technical infrastructure delivering technical resources and collaborative services to project teams.

- **Governance Services**: the business ecosystem platform is a framework for making decisions, collaborating on an open source project and developing initiatives together.

- **Marketing Services**: the business ecosystem platform provides communication and branding services for developing the visibility and market awareness of the project.

OW2 provides this platform: the infrastructure services include tools for developers and the website, the governance services includes the launch of appropriate activities within a formal open source framework, and the communication services include the content curation of the web site and the securing of project presentations in open source industry events.

While the business ecosystem platform is the operating environment that is to be made available to the CHOReVOLUTION project, the community building plan itself is to be developed along a three stages approach. We called these stages: **Technical Stage, Open Source Stage and Ecosystem Stage**.

While all services are to be deployed during all stages, each stage emphasizes one service in particular: the Technical Stage relies principally on Infrastructure Services, the Open Source Stage on the Governance Services and the Ecosystem Stage on the Marketing Services.

Table 1 provides an overview of this process.

Platform Services	Community Building Plan Stages		
	Technical stage	**Open Source stage**	**Ecosystem Stage**
Infrastructure services	Public Website[1], private Wiki[2], forge and mailing lists set up	CHOReVOLUTION platform on OW2 Forge, Choice of development, testing and QA tools	Social Networks
Governance services	Software component identification Selection of open source licenses for the project	Submit project to OW2 Test the platform with SQuAT, Launch OSS project	Alpha Platform release and lifecycle management
Marketing services	Project logo, factsheet, roll-up OSS and industry events materials	CHOReVOLUTION white paper, tutorials, webinars	FISSi workshops with related H2020 and OSS projects, OW2con and FISSi events.

Table 1: Community Building Plan Stages

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[1] http://www.chorevolution.eu/
[2] http://chorevolution.ow2.org/

2.3. Structure of the report

The structure of this report reflects the plan structure. It covers the overall strategy as well as the operational approach to build a community for the project.

- The **Open Source Strategy**, its rationale is detailed in Section 3 of this document.
- The **Technical Stage**, Section 4, clarifies the open source infrastructure deployed for the project.
- The **Open Source Stage**, Section 5, describes why and how the community building plan leverages the OW2 open source community.
- The **Ecosystem Stage**, Section 6, outlines the last stage of the plan to develop market outreach for the project.

2.4. A persistent process

Building a community is a persistent process. The three-stage approach will mature sequentially. The development of the community will start with open source software easy to find, to download and to run. This evolution will enable us to mature all sections of the report toward the end of the project.

For each stage, the tables hereafter highlight some achievement of the plan in the first half of year 1 and provide an outlook for the second half of year 1 and all year 2.

3. Context: the advantage of an open source strategy

The positive externalities granted by an open source strategy makes it the most adequate to develop a community around the CHOReVOLUTION project.

Positive externalities[3] occur when an agent's production or consumption activity has an influence upon another agent's welfare without the intermediation of any economic transaction. The open source software development process and legal framework generate positive externalities whether economic, technologic, strategic or social. From the standpoint of research and development endeavours and more specifically the CHOReVOLUTION project, open source externalities result in lowering the barriers to access to new technologies and facilitating the development of complex technologies.

3.1. Lower barriers to new technology

First of all, the open sharing mechanism and common ownership resulting from the open source licensing system significantly lowers both legal and economic barriers to access to new technologies. Legal barriers are considerably lowered by fundamental open source licensing principles allowing users to deploy and modify the code without restriction nor commitment. Economic, or budgetary, barriers are reduced by the absence of nominal cost to access software. This facilitates the discovery of new software and the dissemination of new technologies.

3.2. Easier cooperation

Second, open source facilitates deployment of complex technologies. The open sharing mechanisms implemented by the open source licensing system enable integrators and developers to seamlessly combine multiple technologies and know-how from independent providers. Open source in general makes multi-tier cooperation easier by enhancing trust and reducing coordination costs.

Complex projects are known for generating high overhead and coordination workloads – what economists call "transaction costs". Open source helps lower these costs. Open source

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[3] http://www.economicshelp.org/micro-economic-essays/marketfailure/positive-externality/

also provides a generic environment for doing business together, the fabric for uncomplicated, multi-player collaboration.

4.   The Technical Stage

This section covers the technical stage of the CHOReVOLUTION Community Building Plan.

Open source is defined by access to software source code and usage freedom. The open source status of a software is determined by the way the code is made available to the public and by the licence that is attached to the code.

The CHOReVOLUTION community building plan is based on open sourcing the key software deliverable of the project, in particular the four following building blocks:

- the Synthesis Processor,
- the Enactment Engine,
- the Enterprise Service Bus,
- the Identity Manager.

In our plan, open sourcing the project platform starts with establishing a suitable structure for the code. The structure of the deliverable has to be modular in order to facilitate third party contributions and the format of the packages made available has to be adapted to the collective work of open source communities.

The CHOReVOLUTION partners are to agree on a release plan for each one of the four building blocks, their respective documentation and quick start guide.

4.1. Code Structure

The open source software activities are usually organized in projects. An open source project regroups development actions corresponding to one or more technical software components, or the integration of different technical components in order to build a platform. The CHOReVOLUTION deliverable will be integrated by seven partners (see WP6: tasks 6.1, 6.2 and 6.3) into a format adapted to the collective work of open source communities.

All partners have agreed that the four CHOReVOLUTION building blocks described in Section 4 will be delivered as open source packages. More particularly, WP6 will provide a Platform with continuous integration and testing with the clear objective of creating an open, collaborative community around service-oriented middleware for the Future Internet.

4.2. Open source licenses for the project deliverable

The selection of licenses for the modules is the second step in setting-up the CHOReVOLUTION community building plan. There are dozens of open source licenses to choose from and each one has characteristics that serve specific purposes. Given the number of partners and the complexity of the code to be open sourced, the CHOReVOLUTION code will be covered by more than just one open source license. However, it is important to select licenses that are not incompatible and the IP strategy must take into account the experience of the partners and the licenses of the open source software they bring into the project.

The licenses currently envisioned are:

- Apache 2.0 (Apache Software Foundation License 2.0[4])
- AGPL (GNU AFFERO General Public License[5])

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[4] http://www.apache.org/licenses/LICENSE-2.0
[5] http://www.gnu.org/licenses/agpl.html

- BSD (Berkeley Software Distribution License[6])
- EPL (Eclipse Public License[7])
- LGPL (GNU Lesser General Public License[8])

4.3. Creative Commons licenses for the project documentation

The Creative Commons licenses were created to provide a legal framework to give everyone from individual creators to large companies and institutions a simple, standardized way to keep their copyright while allowing certain uses of their work. A full list of open source Creative Commons licenses is available online[9].

As the project matures, it will be discussed with the CHOReVOLUTION partners that the dissemination of all educational material (tutorials, webinars, etc.) produced by the consortium should be done under a Creative Commons License.

4.4. Technical stage progress report

Table 2 below highlights achievements as of M6 and outlooks for the Technical stage of the community building plan.

Platform Services	Community Building Plan: Technical Stage	
	Achievements	Outlook
Infrastructure services	Launched Public Website[10] and private Wiki[11] Set-up Mailing Lists	Project Website updates and SEO optimization, Grow Social networking in the consortium, ow2stack testbed infrastructure (tbc)
Governance services	Identify most probable OSS licenses for the project building blocks	Confirm the project building blocks, platform structure and licenses
Marketing services	Logo created Project factsheet Interviews launched Events to be planned: FISL, POSS, OW2con, etc.	Develop event plan Link website with related H2020 and OSS projects Project Tutorials & White Paper

Table 2: Community Building Plan Actions at the Technical Stage

5. The Open Source Stage

5.1. A rapid growth to maturity

Developing a community within OW2 starts by submitting software to the open source code base. The main project building blocks will be submitted as one new project in the OW2. By submitting its code to OW2, the CHOReVOLUTION project will adopt the OW2 open source

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[6] http://www.freebsd.org/copyright/license.html
[7] http://www.eclipse.org/org/documents/epl-v10.php
[8] http://www.opensource.org/licenses/lgpl-2.1.php
[9] http://creativecommons.org/licenses/
[10] http://www.chorevolution.eu/
[11] http://chorevolution.ow2.org/

governance system; by being accepted by OW2 Technology Council it will be granted open source legitimacy.

As a result, the CHOReVOLUTION platform is to be recognized as an open source project offering adequate technical and governance services to facilitate the open cooperation that enable the development of communities.

OW2 project follows a three-stage lifecycle: first upon submission, a project is accepted in incubation, next as the project becomes more substantial it is upgraded to mature, and finally if the technology becomes obsolete the project may be placed in archive.

The community building plan aims at enhancing the CHOReVOLUTION' project profile within OW2. When a software is submitted to the OW2 code base, it is initially accepted in incubation stage however the main part of OW2's communication efforts are on the "Mature" projects. The plan is to fast-track the project life cycle to "Mature" status.

5.2. Tactics

In order to enhance the visibility of the CHOReVOLUTION project within OW2, all software packages available for download from the OW2 forge should be "branded" with the CHOReVOLUTION identity.

In a typical open source way, generating interest will derive from maintaining a high frequency of code releases and regularly publishing news.

Beside the code, the awareness strategy calls for the development of marketing collateral and taking advantage of open source events in which OW2 participate. Marketing collateral include presentations, webinars, case studies, interviews. Open source events include, for instance, OW2con, POSS and FISL.

5.3. Open source stage progress report

Table 3 below highlights achievements and outlooks for the Open Source stage of the community building plan.

Platform Services	Community Building Plan: Open Source Stage	
	Achievements	Outlook
Infrastructure services	OW2 technical plaform and developer tools	Code structure definition Ow2stack testbed Infrastructure and updates of developer tools
Governance services		OW2 governance evangelisation Submit the project Platform on OW2 Forge, SQuAT compliance testing, Launch OSS project
Marketing services	AppHub and CloudScale related projects identified	Grow projects exchanges and collaboration through FISSi workshops, OW2 Webinars

Table 3: Community Building Plan Actions at the Open Source Stage

6.   The Ecosystem Stage

6.1.   Collaborative market outreach initiative

The ecosystem stage will leverage the on-going OW2 FISSi[12] initiative. Initiatives are joint efforts by OW2 Members and non-members aimed at facilitating the use of OW2 technologies by mainstream Systems Integrators, End-Users and Software Vendors. The Future Internet Software and Services initiative by OW2 appeared in the framework of CHOReOS FP7 project. It is an open source community effort aimed at developing and promoting software engineering and middleware technologies that address the specific challenges of the Future Internet which, as defined by the European Commission, encompasses applications driven by people, contents, services and things. This initiative is the mechanism which will support our community building efforts. It is worth mentioning here that an OW2 Initiative does not only deliver code but also marketing collateral (i.e. presentations, tutorials, press releases, etc.) that contribute to community building through the promotion of the technology.

6.2.   Draft Charter

An OW2 initiative is driven by its charter[13] drafted by the initiative lead and the OW2 Management Office. Within the CHOReVOLUTION consortium, INRIA is the OW2 Member to lead the initiative.

The CHOReVOLUTION-led Initiative will start by integrating the project platform (D6.2, the initial release of the CHOReVOLUTION platform) and the required outcomes of the project (including D2.1, D.2.2 and D3.1) as OW2 projects within the OW2 Community before opening up to third-party stakeholders.

6.3.   Ecosystem stage progress report

Table 4 below highlights achievements and outlooks for the Ecosystem stage of the community building plan.

Platform Services	Community Building Plan: Ecosystem Stage	
	Achievements	**Outlook**
Infrastructure services	Set-up 3 social media: LinkedIn group, Twitter and Slideshare accounts	Start Develop section with alpha software and documentation ready to download and to try
Governance services	Connect OW2 FISSi website with the first relevant links about CHOReVOLUTION	Platform lifecycle management Develop OW2 FISSi initiative participants and workshops
Marketing services	Website Discover section, Scientific and industry events plans	FIware collaboration Plan and record Webinars, Website events, news, Press Releases, publications, etc. Grow social media activity, Promote FISSi and CHOReVOLUTION Platform

Table 4: Community Building Plan Actions at the Ecosystem Stage

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[12] http://www.ow2.org/bin/view/Future_Internet/
[13] http://www.ow2.org/bin/view/Future_Internet/About_FAQ

7. Conclusion

This report documents on-going and planned efforts to build the community and open source engagement in the CHOReVOLUTION project. It details the three stages approach that is planned, the situation after six months into the project and next expected results.

During the first six months of the project, we've structured the community building efforts with a clear layout of the project. The technical and legal foundations are still requiring strong leadership efforts and commitment to gain the participation of all the consortium members.

In this plan, the project consortium members will contribute to grow an active community of developers and stakeholders through technical tools and communication channels including online services and social networks. They should also support the community and shorten the learning curve of CHOReVOLUTION technologies and open source software.