



Open Source Initiative

2022 Annual Report



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As the leading voice on the policies and principles of open source, the OSI helps build a world where the freedoms and opportunities of open source software can be enjoyed by all. The OSI supports institutions and individuals working together to create communities of practice in which the healthy open source ecosystem thrives.



Letter from the Chair

Josh Simmons

Good things are happening at the Open Source Initiative. After 23 years of good work to promote and protect open source, we've laid the groundwork for the next 20. 2021 was "Year 0" of a new way of being that will allow OSI to more meaningfully deliver on its mission.

In 2021, we completed a many-years-long project to professionalize, build staff capacity, and transition from having a working board to having a supervisory board. We hired our first ever Executive Director, Stefano Maffulli. We regrouped ourselves with a clarified mission, defined a vision of the near future, and labored through an intensive process to keep our stakeholders at the center of our thinking and make strategic plans focused on them.

While we did complete a lot of self-work in 2021 which set us up for long-term success, our program activity never slowed. We increased investments in communication; tripled our membership from nearly 700 to about 2,100; convened the Practical Open Source Information (POSI) virtual conference; served as a fiscal sponsor to ClearlyDefined and SeaGL; and ultimately approved four new licenses: the CERN Open Hardware License 2.0 family of licenses, spanning from permissive to reciprocal.

Major Changes in 2021

Staff

- Deb Nicholson's departure as Interim General Manager
- Executive Director search, culminating in the hiring of Stefano Maffulli, OSI's first Executive Director
- Betsy Waliszewski joined as Director of Sustainability
- Communications partner retained (Cathey Communications)

Board

- Departing: Elana Hashman, Chris Lamb, Faidon Liambotis
- Arriving: Thierry Carrez, Catharina Maracke, Aeva Black

Three new Affiliates

- [TeX Users Group](#)
- [Teckids](#)
- [Libre Space Foundation](#)

Thank you to all who contributed to these accomplishments in 2021, and welcome to those who've joined us to ensure the future of open source!

Letter from the Executive Director

Stefano Maffulli

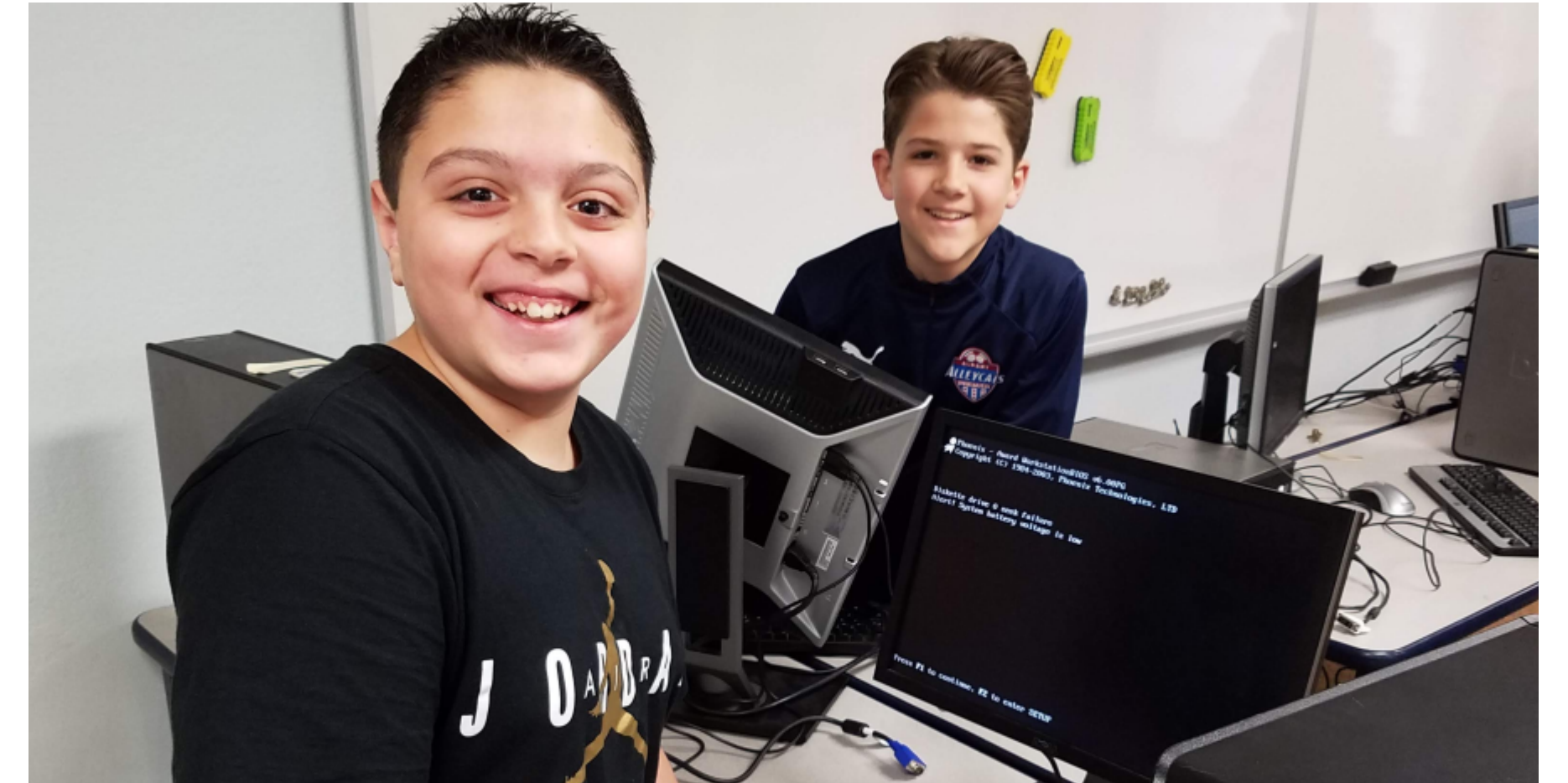
When I joined the Open Source Initiative as Executive Director in September 2021, the Board of Directors, Board Chair Josh Simmons, and interim Executive Director Deb Nicholson had just completed a pivotal task: redefining the **mission and vision** of the organization, culminating a year-long “**period of reflection and introspection.**”

So, on my first day in a leadership role with this 24-year-old organization, I was fortunate to step onto what you might describe as “a newly poured foundation” and blessed to join a great team that is dedicated to this construction effort:

- Phyllis Dobbs, Controller
- Jessica Iavarone, Community & Marketing Manager
- Simon Phipps, Director of Standards and Policy
- Betsy Waliszewski, Director of Sustainability

Together, we are charged with helping build a bolder, more responsive, and representative OSI. The blueprint we’re using has three primary objectives:

- Reinvigorate communication with all stakeholders;
- Improve operations; and
- Support and expand the existing programs.





Continued...

We've made a lot of progress in just a few months. Among the highlights, from my perspective, are these accomplishments:

- Our new membership campaign tripled the amount of individual members.
- We've scaled up our engagement with members and sponsors, many of whom you can read about in our [newsletters](#) and [blog](#) (which is in the process of being refurbished).
- We have laid out a [project to modernize the way we publish, discuss and approve licenses](#).
- Our new [sponsorship prospectus](#) invites broader participation and offers more transparency.
- The 2022 [State of Open Source Survey](#) has been published, drawing attention to progress we can celebrate and challenges we need to overcome.

You can read more about the progress we made in 2021 in the sections of this report that follow.

The future will undoubtedly hold new challenges for us. For example, new technologies such as AI, blockchain and Web3, and new organizational frameworks like distributed organizations are already challenging the applicability of the legal frameworks we're accustomed to.

As open source becomes more pervasive and extends into new landscapes, the responsibilities we have to sustain open source values are amplified. With your ongoing support, we can be ready for the challenge. I'd love to hear your thoughts, and I invite you to book time to chat during [OSI's informal office hours on Fridays](#).

Consolidated Financials 2021

(\$ in thousands)

Phyllis Dobbs, Controller

Revenue	2021	2020
Program Service Revenue	\$77	\$205
Contributions, Membership Dues, and Grants	\$391	\$261
Other Revenue	\$7	\$2
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Total Revenue	\$475	\$468

Expense	2021	2020
Program Service Expenses	\$57	\$20
Salaries and Compensation	\$171	\$113
Legal and Professional Fees	\$110	\$91
Marketing and Promotion	\$14	\$0
Insurance	\$14	\$9
Other Expenses	\$35	\$26
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Total Expense	\$401	\$259

Net Income ●-----● **\$74** **\$209**

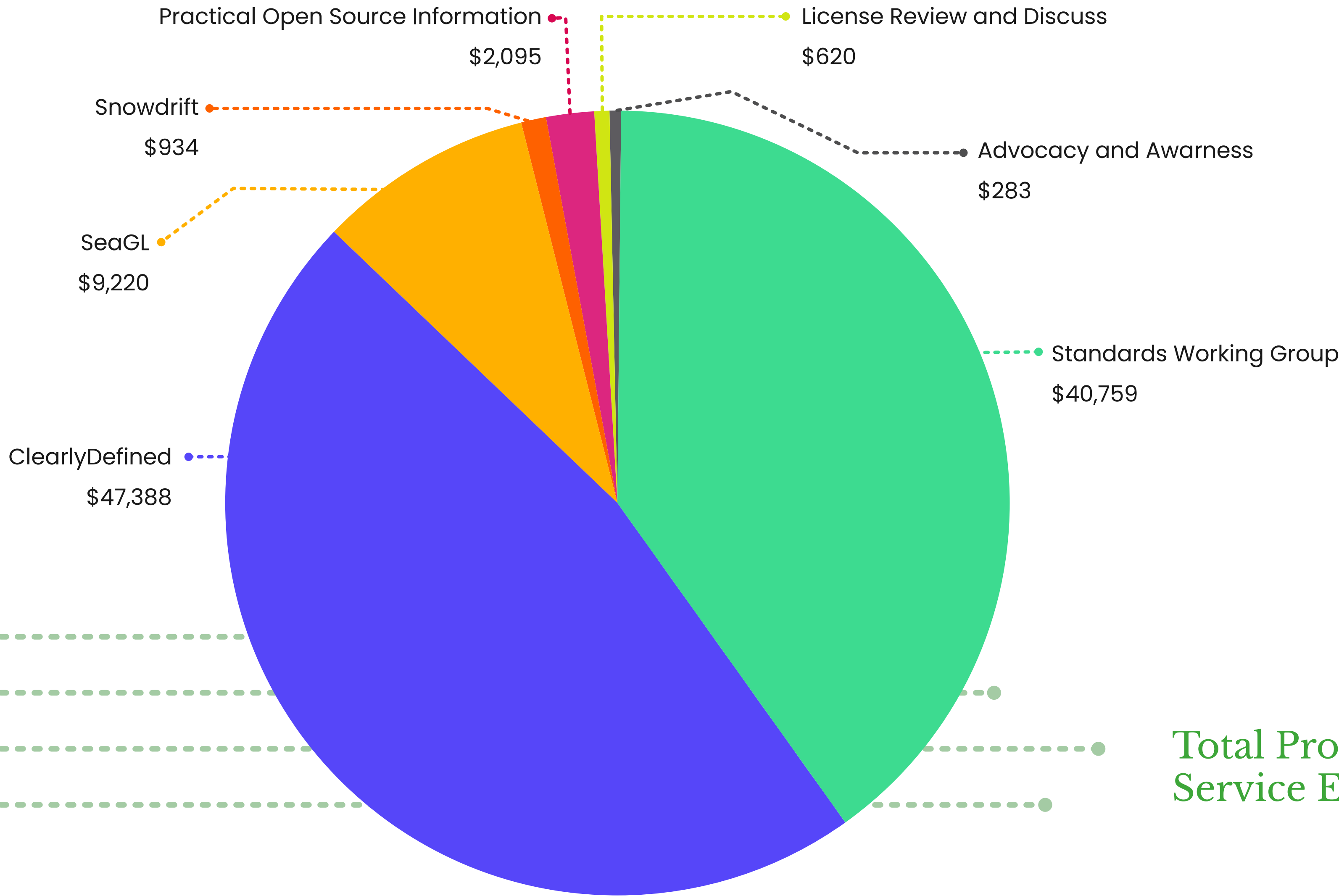
Assets	2021	2020
Cash and Cash Equivalents	\$533	\$576
Accounts Receivable - Net	\$283	\$150
Other Current Assets	\$0	\$9
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Total Assets	\$816	\$735

Liabilities	2021	2020
Accounts Payable and Other Liabilities	\$2	\$36
Loan - SBA	\$150	\$150
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Total Liabilities	\$152	\$186

Net Assets	2021	2020
Net Assets Without Donor Restrictions	\$396	\$304
Net Assets with Donor Restrictions	\$268	\$245
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Total Net Assets	\$664	\$549

Total Liabilities and Net Assets ●-----● **\$816** **\$735**

Program Service Expenses 2021

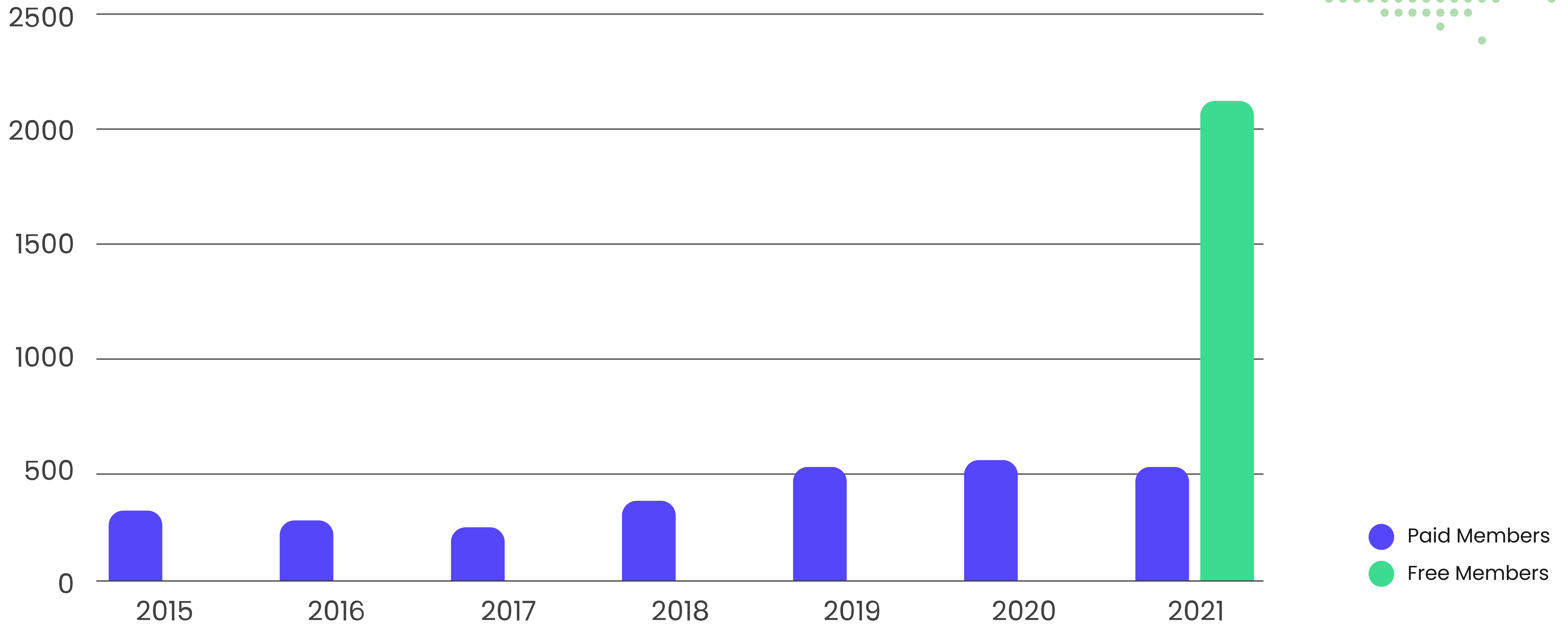


Total Program Service Expenses \$101,299



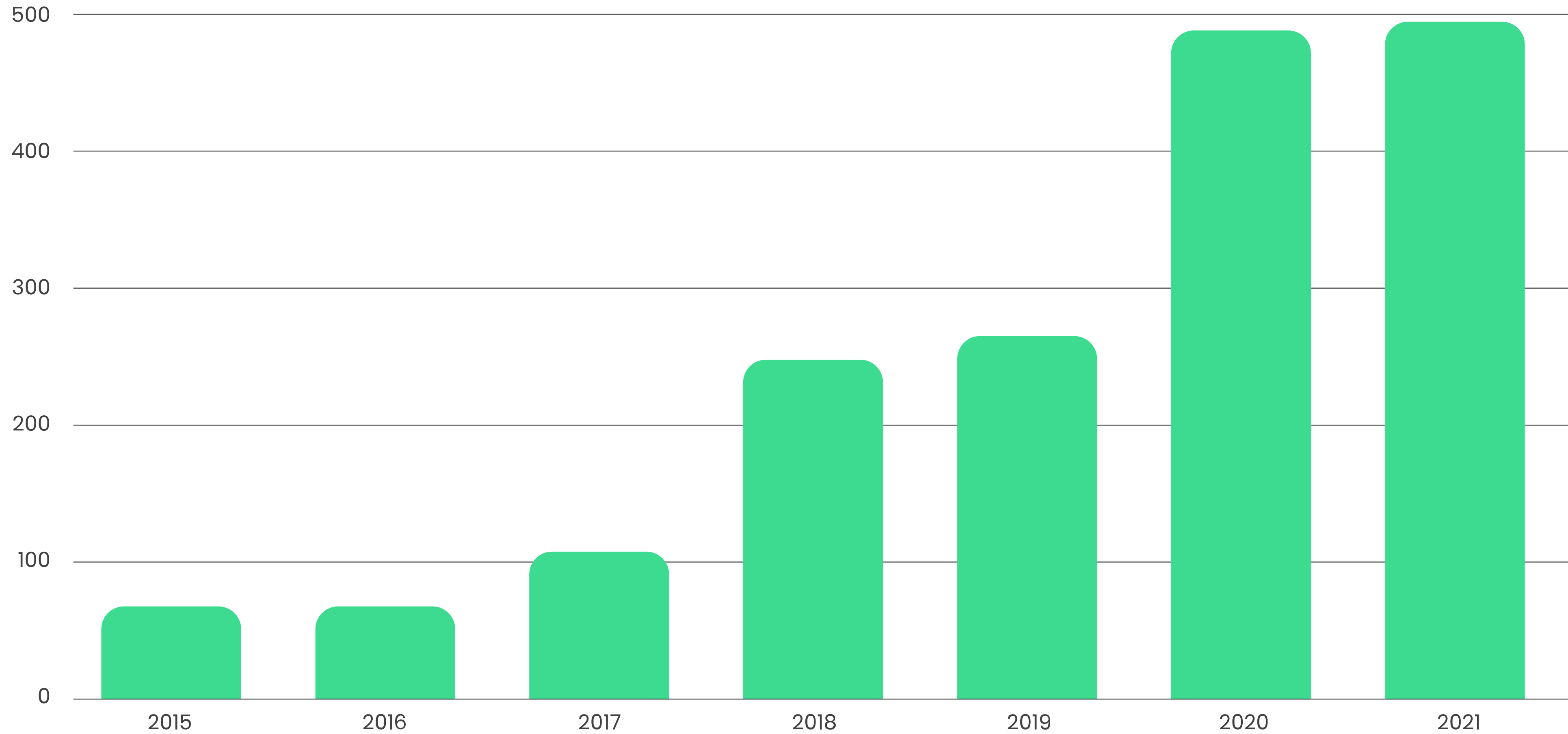
Membership Trends 2015–2021

(\$ in thousands)



Non-Project Asset Trends 2015–2021

(\$ in thousands)



The Inaugural "Practical Open Source Information" Event

Jessica Iavarone, Community and Marketing Manager

On September 16, 2021, the community joined together for our first ever online event, Practical Open Source Information (POSI), a forum for open source practitioners to discuss the "nuts and bolts" knowledge that organizations of all sizes need whether they're already using lots of open source or are just getting started on their open source journey.

With more than 300 attendees, 30 speakers including a keynote address from Heather Leson of the International Federation of Red Cross and Red Crescent Societies about the role open source plays in humanitarian efforts, 18 recorded videos and 4 blog posts, this half-day event proved to be very valuable for many members of our community who came together to discuss a wide range of pressing issues affecting open source practitioners everywhere.

Geared towards open source developers, scholars, lawyers and managers interested in learning about open source in practice, this unique event focused on discussions related to everyday open source issues in all types

of organizational contexts. This fully online event utilized an instance of the open source web conferencing system, [BigBlueButton](#), to stream our talks and panels, with hosting courtesy of our in-kind sponsors at [Blindside Networks](#).

Our event was organized into three tracks: OSPOs and Lawyers, focusing on open source compliance, procurement, and legal topics; The Open Source Journey, with talks and panels for open source professionals; and Academia & Beyond, geared towards discussions on open source community and education matters. Our speakers shared their own experiences in implementing and working with open source software and communities, and engaged in lively discussions with audience members.

POSI 2021 was a resounding success. Check out [a selection of presentation videos available](#) on demand.

Standards and Policy Report

Simon Phipps, Standards and Policy Director

OSI has been engaging directly with de jure standards bodies since 2018 when it came to our attention that there was a campaign, driven by some companies highly dependent on revenues from standards-essential patents, to have standards development organizations (SDOs) redefine open source licensing as granting licenses to copyrights only, not patents. OSI retained consultants to engage at any relevant SDOs. OSI's policy is to reinforce the fact that "open source" is a globally understood term-of-art that is not open to casual redefinition and to assist in creation of policies and events that involve open source software and its licensing.

This engagement has continued ever since, and after serving as OSI president, I now have the role of OSI's Director of Standards and Policy. This role involves coordinating OSI's engagement at SDOs, drafting policy positions and issue responses for OSI, and running activities for Affiliates and Sponsors with standards-related missions. These activities are supervised by the Board Standards Committee.

During 2021 OSI:

- Used its ongoing membership in the European Telecommunications Standards Institute (ETSI) to support the long-running Board exploration of how ETSI members can benefit from open source;
- Supported CEN/CENELEC discussions on the subject of open source;
- Engaged at various pan-European policy events in conjunction with Open Forum Europe (OFE);
- Supported my engagement as a member of a BSI committee at the International Institute for Standards Joint Technical Committee 1; and
- Coordinated with OSI affiliates OASIS, Eclipse and Linux Foundation, as well as engaging the Institute of Electrical and Electronics Engineers Standards Association.

OSI also communicated with the European Commission over misleading and false vendor assertions submitted to a competition policy consultation and as a consequence joined the Transparency Register. OSI continues to value its relationships with OFE and Free Software Foundation Europe, which are both active in this area at a European level, as well as with its Affiliates active in various countries.

Sustainability and Membership Report

Betsy Waliszewski, Director of Sustainability

I've been involved in the open source community for many years, beginning in 1999 at O'Reilly Media. In 2015, I joined the Python Software Foundation serving as Sponsorship Coordinator and Administrator.

In 2021, I was pleased to return to the broader open source community by joining the Open Source Initiative as the Director of Sustainability, responsible for maintaining and increasing corporate sponsorships. In addition to fundraising responsibilities, I've been tasked with sharpening up our communications with stakeholders in the open source community.

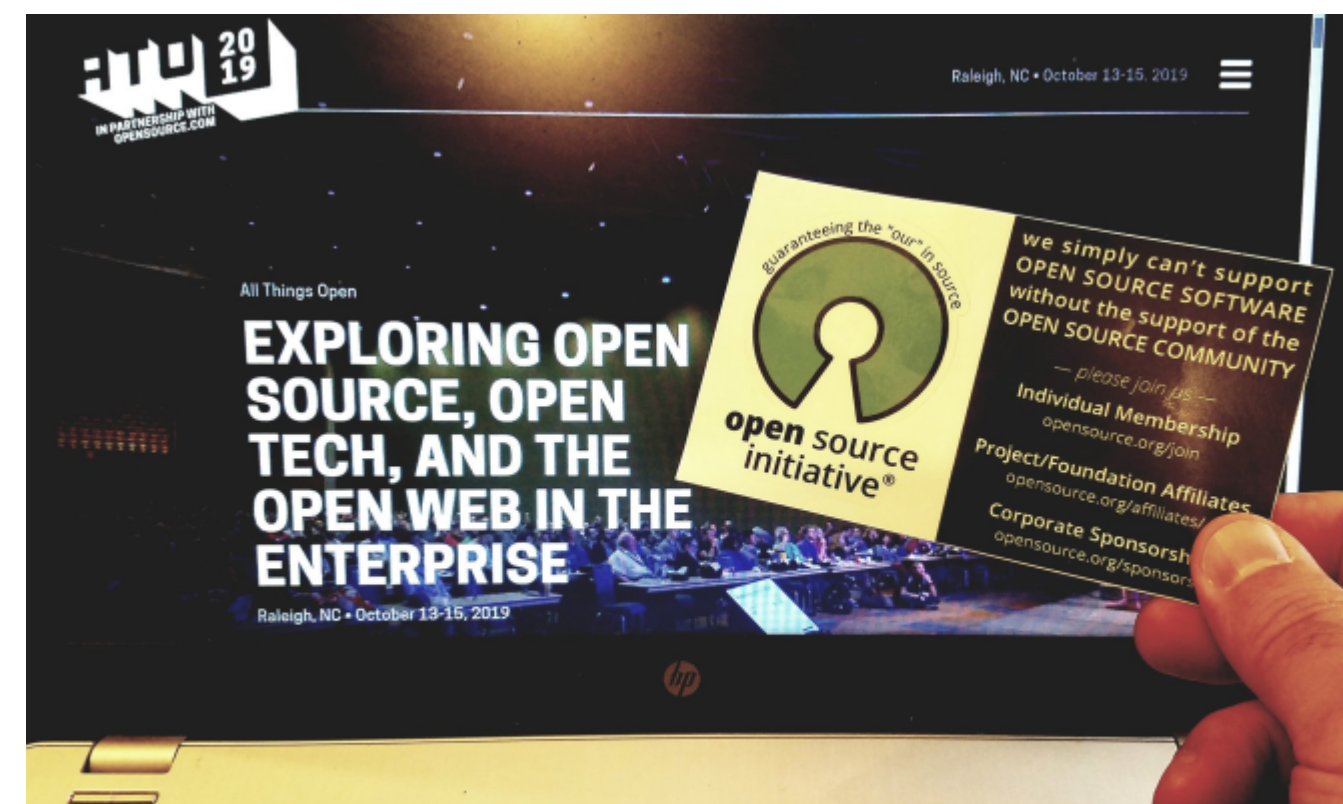
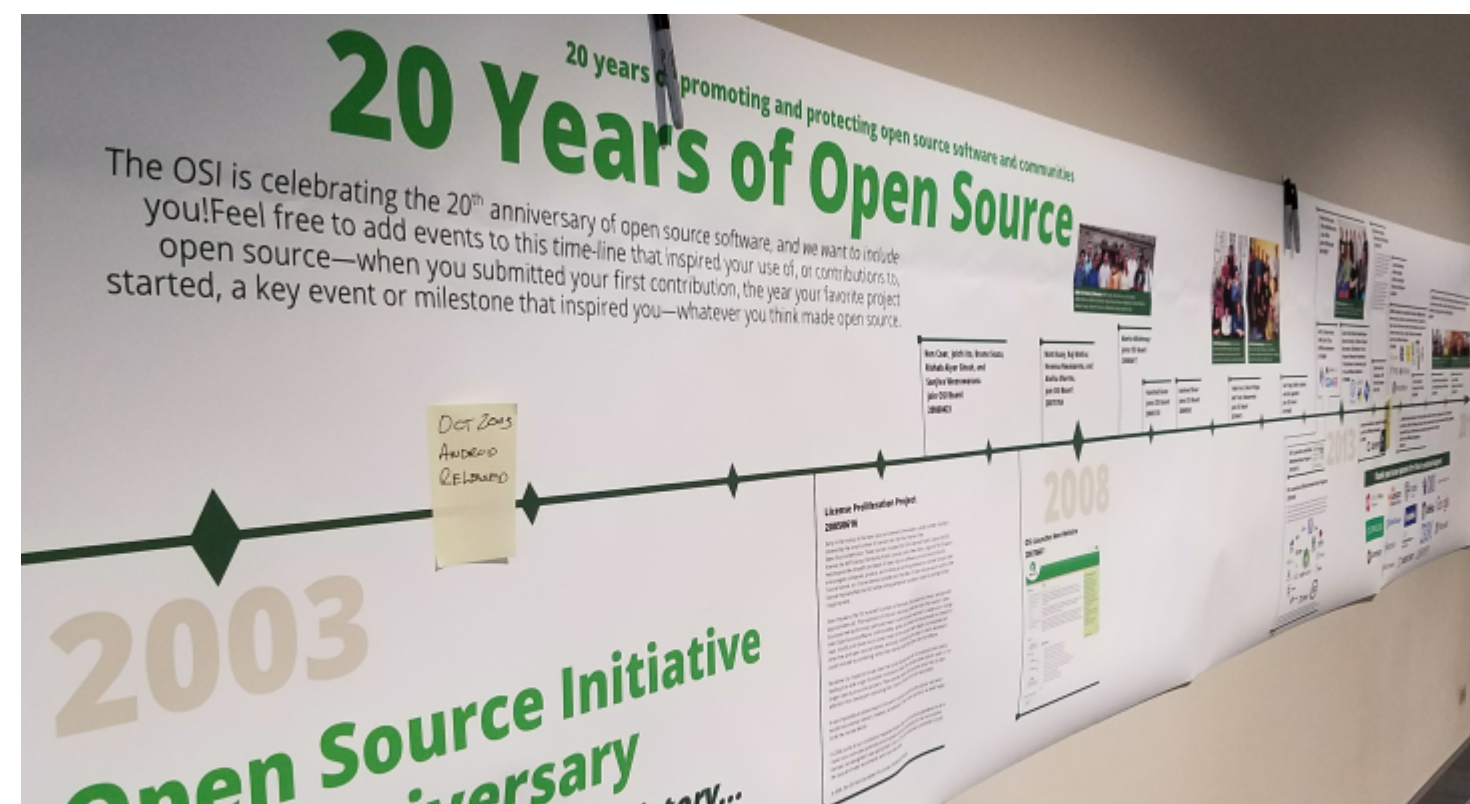
Thank you to our new and returning sponsors for your financial support during the pandemic. I look forward to helping the Open Source Initiative in community-building, education, and public advocacy to promote awareness and the importance of non-proprietary software.

Highlights of our 2021 Accomplishments

September - Practical Open Source Information (POSI): A forum for open source practitioners to discuss all the details of implementing open source. It was a resounding success with more than 300 attendees, 30 speakers, and a brilliant keynote address from Heather Leson of the International Federation of Red Cross and Red Crescent Societies

November - Membership Drive: The results surpassed our expectations, with 1,354 new members joining the OSI family! We introduced a new zero-cost membership level with the intention of reaching out to people who are not in a position to pay for membership. Our next campaign will be focused on encouraging our new free members to convert to voting members so that everyone's voice can be heard.

December - New Sponsorship Prospectus for 2022: We updated our prospectus to include many new and exciting ways for sponsors to connect with our community. Sponsoring OSI allows corporations to show support for open source software, its development, and the activities of the OSI.



Thank you.

opensource.org

