

A NATIONAL OPEN SOURCE POLICY FOR MALAYSIA

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Introduction

About Me

- Working at MIMOS Berhad since year 2000.
- Involved in Open Source since my university days
- Head Judge for National Skills Competition for IT trade (Open Source) in 2002.
- Member of the advisory committee to the Ministry of Education in developing an Open Source syllabus for new IT courses for Technical and Vocational schools.

About My Employer

- I work in MIMOS Open Source R&D Group
 - researching benefits of open source for the nation
 - researching open source itself (technology, business case, legal etc) and disseminating this information
 - **Part of 'Next Generation Computing',**
(one of the 3 focus areas of MIMOS R&D)

What I can tell you about the policy:

- Why we feel Malaysia needs an open source policy
- Who and how we've consulted people
- What areas have been discussed

What I can't tell you:

- What the policy says
 - Because it's still draft
- Full details of the draft policy
 - Because we want to respect MSC-ICM and NITC council members who have yet to see or endorse the draft policy – they shouldn't be the last to know

Why a National Open Source Policy for Malaysia?

Why Open Source?

Motivation that Points towards Greater Role for Open Source

Area

Motivation

Choice and Empowerment

- We need to make sure we have a choice in software (monopoly is bad for the customer).
- We need to be able to easily customize and enhance software when we want (especially localization).

Develop Local Industry + Skills

- Much of our software is imported. How do we meet our own requirements and even export?
- Let's try to do as much as possible locally – support, enhancement, design, development.

Sovereignty + Security

- We need to trust the software we use.
- We need to reduce our dependence on foreign software and skills, especially in critical areas.

Financial Benefits

- Can we reduce the amount we spend on software?
- Can we buy more software and services from Malaysia, so the money stays in our own economy?

Why A Policy

1) Overcome the barriers to open source adoption

Lack of awareness

- Unaware of alternatives to proprietary software

- Unaware of long term risks created by current vendor-driven proprietary model

- Unaware of various open source business models

Lack of impetus

- Government sending mixed messages

- Easy access to pirated software

Lack of capacity

- Education system currently favours proprietary software

- Strong commercial ecosystem to provide support is lacking

- Difficult to get PCs pre-loaded with open source

Where and how to start?

- Existing 'de facto' data standards are proprietary

- Migration requires support and assistance

2) Co-ordinate and **balance** the adoption of open source

- Open source *software*:

↓ Local Demand, ↑ Local Supply : Low profit for local companies

↑ Local Demand, ↓ Local Supply : Have to import software

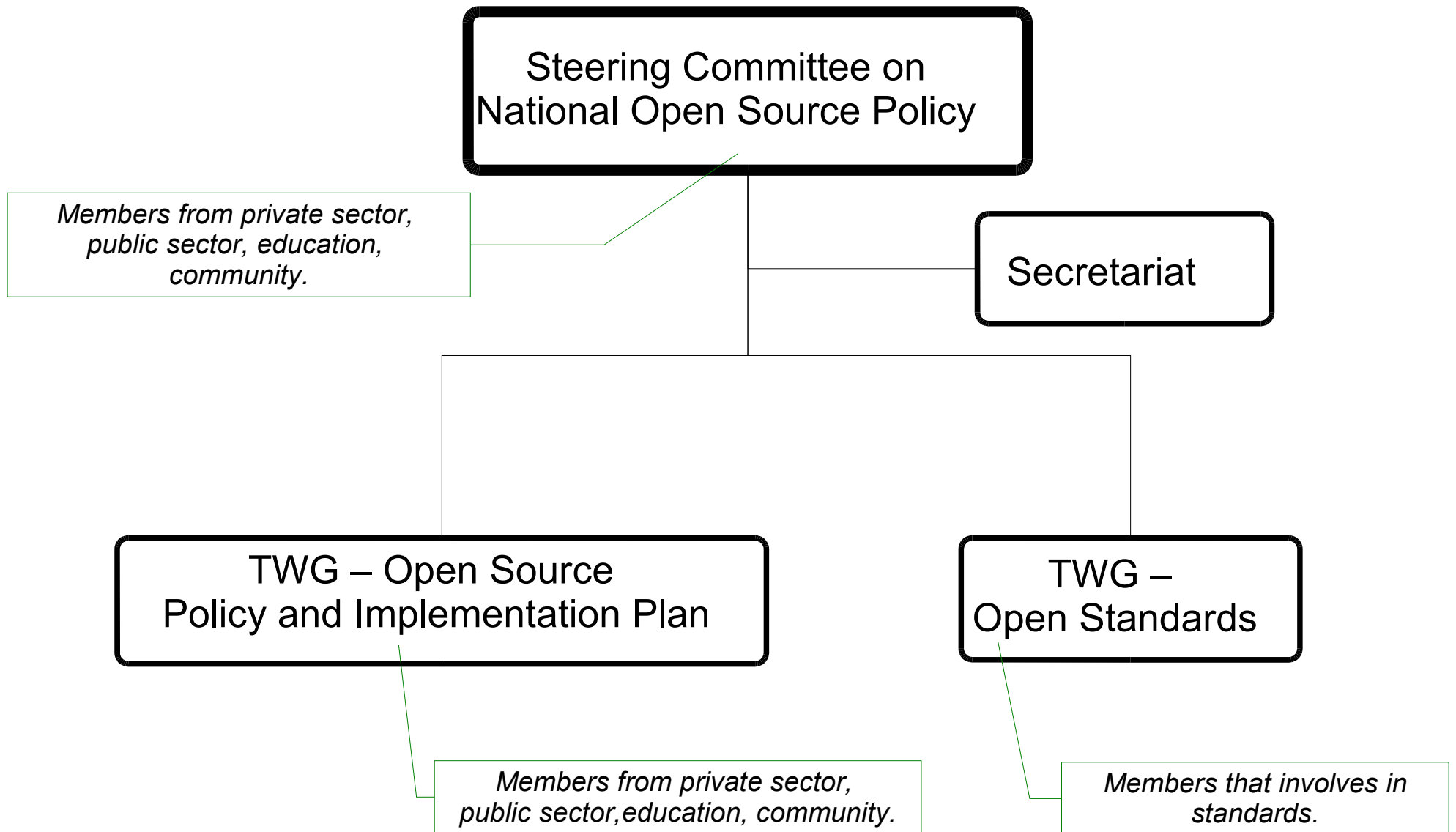
- Open source *skills*:

↓ Local Demand, ↑ Local Supply : Unemployed students

↑ Local Demand, ↓ Local Supply : Have to import skills

How do we develop a Draft Policy?

WORKING STRUCTURE



Composition of Steering Committee:

- Organisations most affected by policy
- Organisations involved in implementation
- People with authority to create change within their organisation
- People knowledgeable on open source
- Members from all sectors
 - Public sector
 - Private sector
 - Education
 - Community
- Limited size
 - So we try to get representatives of wider groups

SC Includes reps from:

MAMPU

MoF

MoE

MECM

MOSTE

BNM

Petronas

MaVCap

FMM

PIKOM

MDC

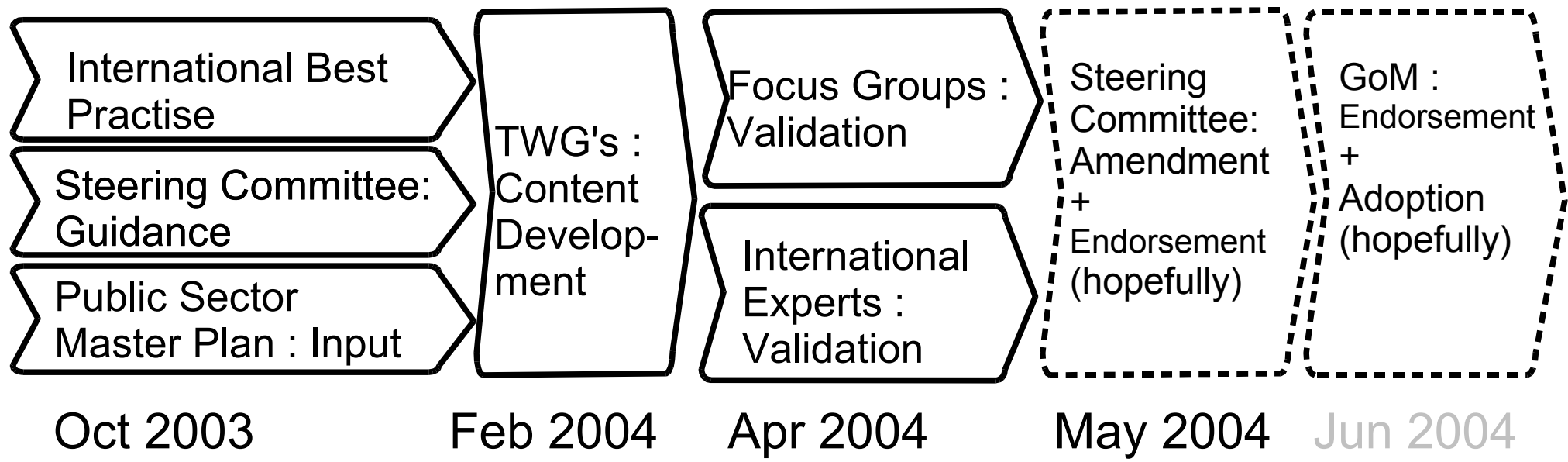
MNCC

IPTA-ICT

IPTS

my-opensource.org

Input Flowchart



MILESTONES

- *Oct 2003* - MSC-ICM asked MIMOS to develop National OSS Policy
- *Dec 2003* - First Steering Committee Meeting Convened
 - Defined methodology and org chart, gave policy input
- *Jan, Feb 2004* – Consultation with Technical Working Groups
 - Reps from Public Sector, Private Sector, Education+Community Sector
 - Valuable and positive input received
- *Feb 2004* – MAMPU's Public Sector Open Source Master Plan
 - Role of open source in the public sector, includes framework for implementation
 - Approved by GITIC in February 2004, published in April 2004
- *Mar 2004* – Feedback to Steering Committee
 - Suggestion to validate with local focus groups as well as international experts
- *Mar, Apr 2004* – Further Consultation and Consolidation
 - Consultation with local focus groups
 - Consultation with international experts
 - Turn slides and input from SC, TWG into draft policy
- *13 May 2004* - 3rd Steering Committee Meeting
 - We are hoping to get endorsement for draft policy

WORLDWIDE NATIONAL POLICIES

UK

Type Policy

Scope Public Sector

Author : Office of E-Envoy

Published : July 2002

Status : Official Policy

Summary

- Choose open source or proprietary based on best value for money
- Seek to avoid vendor lock-in
- Open Standards for all future IT development. Periodic recommendations published.
- Consider whether Gov funded R&D software should be open sourced by default

References

Policy (PDF, 8 pages), Guidance (PDF, 14 pages) and Case Studies : <http://www.ogc.gov.uk/index.asp?id=2190>

China

Author : **Government Procurement Center,
Ministry of Information Industry**

Type Procurement Policy, Software Strategy

Scope National

Summary

- **Public sector must use home-grown software, exceptions require special request**
- **Motivation is national security and promotion of local industry**
- **Use Linux as base to develop local software industry**
- **Pressure proprietary vendors to show source code**

References

Announcement of Policy: http://english.peopledaily.com.cn/200308/19/eng20030819_122618.shtml

Microsoft signs major deal with Chinese Gov : <http://news.com.com/2100-7345-5110415.html>

Chinese software industry based around Linux : <http://www.internetnews.com/dev-news/article.php/3105171>

China develops own video format, royalties required : <http://www.china.org.cn/english/2003/Jul/71266.htm>



USA

Author : Various states
Published : Various
Status : Some draft, some official

Type Policy

Scope Various departments and states

Summary

- Choose open source or proprietary based on best value for money
- Seek to avoid vendor lock-in
- Prefer open standards

References

Department of Defense Policy: <http://www.egovos.org/pdf/OSSinDoD.pdf>

Massachusetts Draft Policy : <http://www.state.ma.us/itd/openstandards.htm>

Oregon Proposed Policy : <http://www.leg.state.or.us/03reg/measures/hb2800.dir/hb2892.intro.html>

South Africa

Author : Gov IT Officer's Council
Published : January 2003
Status : Draft

Type Policy Recommendations
Scope All sectors

Summary

- **Choice based on value (economic). If similar, choose open source due to greater social value.**
- **Tackle public sector, private sector and community in parallel.**
- **Need to build capacity / ecosystem.**
- **Review existing procurement policies.**
- **Open standards as prerequisite for public sector procurement.**

References

South African Policy : http://www.oss.gov.za/docs/OSS_Strategy_v3.pdf (PDF, 35 pages)



Taiwan

Author : Free Software Steering Committee,
National Info. and Communication Initiative
Published : 2002
Status : Implementation Underway

Type Implementation Plan
Scope National – All sectors

Summary

- Increase open source adoption in all sectors until it is 'pervasive'
- Create 'value add' open source service industry
- Incentives for Industry
- Examine existing laws to ensure encouraging to open source

References

Taiwan Free Software Dev Plan Described at AsiaOpen Source Symposium, Nov 2003:
<http://www.cicc.org.sg/aoss-2/present/taipei1.pdf>

Vietnam

Author : Ministry of Science and Tech.
Published : March 2003
Status : Awaiting PM approval

Type Policy and Action Plan

Scope National

Summary

- **3 phase strategy. Phase 1 (planning) *completed* March 2003**
- **Open source for the whole economy, not just the public sector**
- **Students in full education system should learn open source**
- **Build local software and support ecosystem**
- **Open source PCs in education sector (good progress already)**
- **Later, all public sector PCs must use open source software where it is tested and effective (2005)**

References

Summary of proposed policy (March 2003)

http://www.asia-oss.org/march2003/downloads/TranLuuChuong/Report/pdf/How_Vietnam_faces_to_Open_Source_Software.pdf

Updates on implementation (Nov 2003) : <http://www.cicc.org.sg/aoss-2/present/vietnam.pdf>

Worldwide Open Source Policy Strategies

Strategy	Pros	Cons	Key Initiatives
1) Focus on open standards and increasing choice [EU]	<ul style="list-style-type: none"> • Good for choice • Open standards encourages open source. 	<ul style="list-style-type: none"> • Adoption may be slower than with <i>preference</i> for open source. 	<ul style="list-style-type: none"> • Government infrastructure on open standards. • Guidance on increasing choice.
2) Standardize on local software (open or proprietary) [China]	<ul style="list-style-type: none"> • Tends to encourage open source (not guaranteed) • Good for sovereignty • Good for local industry • Financial benefits if successful 	<ul style="list-style-type: none"> • Needs large local capacity. 	<ul style="list-style-type: none"> • Build / fund large software ecosystem and R&D capacity
3) No preference – choose based on value for money [UK, USA]	<ul style="list-style-type: none"> • Easy method to choose : case-by-case • Free market theory • Good financial benefits 	<ul style="list-style-type: none"> • Only captures financial benefits • Proprietary vendors accept short term loss to gain lock-in 	<ul style="list-style-type: none"> • Guidance on accurately measuring value • TCO studies / pilots etc • Collective procurement
4) Explicitly promote open source in all sectors [Vietnam, South Africa, Taiwan, some South American countries]	<ul style="list-style-type: none"> • Benefits all sectors of economy • Concurrent approach reduces supply↔demand issues. 	<ul style="list-style-type: none"> • Requires more intervention • Risk of upsetting 'free market' • Confrontation with proprietary software lobby 	<ul style="list-style-type: none"> • Government-led initiatives to build commercial open source ecosystem • Widespread rollouts, (typically starting with Public Sector and Education)

What's in the Policy?

(I can't give you details, but I can mention what kinds of issues have been considered)

Policy Area : What Should be the Role of Open Source in the **Public Sector**?

Factors to consider:

- Choice is good for the consumer.
Do we presently have vendor lock-in?
 - Would more open source help to reduce this?
- How do we maintain sovereignty, especially in critical systems?
- If we use more open source:
 - migration should cause minimal disruption
 - we need training programmes
 - are there legal / licensing issues to consider?
 - where will the software come from?
 - who will ensure it is good quality?
 - who will support it?

Policy Area : What Should be the Role of Open Source in the **Private Sector**?

Factors to consider:

- How can the private sector make money from open source?
 - Do we need to investigate legal framework more?
- Should we influence the private sector to get more involved in open source?
 - If so, how?
 - What's preventing them at the moment?
 - Incentives?
 - Any other assistance needed?

Policy Area : What Should be the Role of Open Source in **Education**?

Factors to consider:

- Is our human capital being locked into a few vendors?
- How do we equip people with lifelong skills?
- What does industry really want, product knowledge or theoretical knowledge?
- If open source can help, then:
 - How do we introduce more open source into education?
 - At what level : uni? secondary? primary?
 - Do we retrain those with proprietary skills?
 - Privately funded as well as publicly funded education?
 - How do we implement? Syllabus? Train teachers?
 - Do we move to all open source, or mixture?

Policy Area : What Should be the Role of Open Source in **the Community**?

Factors to consider:

- Should we encourage more local contribution to open source? How?
- Should we influence the general public to use more open source? How? What about software piracy?
- Can we use open source in 'bridging the digital divide'?
- What about all the NGO's?

Policy Area : What Should be the Role of Open Source in **R & D**?

Factors to consider:

- Should we encourage the use and development open source software in R & D?
- Should we introduce open source into all R&D or only R&D directly on software?
- How do we do this?
- What about the legal implications?
 - how do we make sure Malaysia can still easily commercialize our own R&D?
 - Should we standardize on one license?
- Are there any conflicts with other policies e.g. patent policies?

Other Policy Areas:

Some other things to consider:

- Who's going to monitor the implementation?
 - MAMPU is leading implementation, but only for the *public sector*.
- Do we need further methods to raise awareness?
- Should open standards live inside an open source policy?
 - Proprietary software can use open standards.
- How much detail is needed in the policy to guide implementation?

- *Is there something we've missed?*

Next Steps

- 13th May – Final Review by Steering Committee
 - Aim to seek final endorsement from SC
 - Integration of comments from SC
- Late May 2004 – Ready for Endorsement by GoM
 - Present at NITC and/or MSC-ICM for endorsement



Q&A

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