Open-Source Policy Statement

Public administrations have the mission of best allocating available resources in a socially responsible, transparent and economically efficient manner. Open Source Software, being a public resource based on non-rival use rights and allowing for lower entry barriers in software development, offers public stakeholders a set of cost-effective, re-usable tools and resources that can give impetus to innovation, entrepreneurship and economic growth. Moreover, public organizations have a major role in the European software market as mass scale software "consumers" with specialized needs and requirements. In this context, adopting software environments in public IT infrastructures sector is not a neutral, technical process but a highly political and strategic one with various implications and policy aspects to be considered in decision making.

In order for PAs to server their role more effectively they need to take advantage of the benefits Open Source Software and Open Standards offer.

- **Public Data Openness:** Open standards and platforms should be implementable in both Open Source and proprietary systems and applications. When opting for a specific software environment, however, public administrations also define the level and extent of openness allowed by software features and functionalities. Potential risks and barriers to accessibility such as data lock-ins are critical factors to be considered. Open source software, natively supporting a wide range of open standards and being highly customisable particularly relates to the requirement of openness and accessibility.

- **Transparency and Accountability:** It has been argued that the citizen's right to information goes as far as scrutinizing the procedures under which information was generated and processed. In this sense, software should also be well documented in all its technical features and adopted through open and transparent procurement and selection procedures in order to promote competition fairness, public information accessibility and accountability. Software system architectures, features and functionalities should be as visible as possible so they can be benchmarked, evaluated and modified if needed to meet the particular needs of public organizations. Open Source Software providing, by definition, access to its source code and allowing public stakeholders to assess specific software modules and features is central to the openness and transparency priority thus raising a serious challenge for public stakeholders and decision makers.

- **Cost effectiveness and long term benefits:** Open Source Software based on a free use and distribution licensing model can help public administrations significantly reduce the cost of acquiring software. However, should not be considered as cost-free and decision making for public spending should refer to all associated, direct or indirect costs.

- **Local control and Independence:** Avoiding data and vendor lock-ins is a critical strategic priority for any public organization planning to acquire IT systems and applications. Not heavily relying on external providers for data security and not being tied up to specific

software products and vendors are two key factors for national governments and public administrations wishing to maintain a certain level of independence.

Below we describe some proposed actions and policy recommendations for PAs in order to assess and adopt Open Source Software and achieve the goals mentioned above.

Data openness and reusability:
- Using Open Standards on a "comply or explain" basis
- Fine-tuning interoperability strategies
- Defining, monitoring and support mechanisms for openess and reusability

Licensing, procurement and software market policies:
- Defining a clear licensing policy
- Developing common licensing policies across the public sector
- Monitoring tenders for software discrimination practices
- Updating procurement frameworks and procedures
- An "equal consideration" policy: balancing needs and options
- Requiring compliance with interoperability frameworks in public tenders
- Setting a "re-use instead of re-build" priority on public tenders
- Developing joint procurement policies in fulfillment of shared priorities

Open Source Software adoption, integration and sustainability:
- Developing Open Source Software adoption plans as part of wider IT strategies
- Allowing for diversity in Open Standard Software environments
- Adapting internal processes to Open Source environments
- Clarifying the legal and institutional framework
- Providing guidance and support to small and medium organizations
- Involving staff through Open Source Software training and awareness
- Beyond cost analysis: defining an Open Source Software assessment policy
- Integrating Open Source Software as a vehicle for regional development
- Supporting public organizations as potential Open Source Software producers

Research & innovation:
- Investing in Open Source Software research and development
- Revising the EU software standardization strategy
- Investing in innovative software products and solutions

Training and education:
- Integrating Open Source Software as a means to increase ICT skills and e-inclusion
- Integrating Open Source Software in the educational system on a regional / national level