

Educate Users to Improve the Project Sustainability

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LibreOffice User Base Estimate

In term of number of users worldwide, we provide the following estimate based on a global number of PC users between 2 and 3 billion (90% Windows, 8% macOS, 2% Linux):

- 100% of desktop Linux users (between 40 and 60 million)
- 10% of desktop Windows users (between 180 and 270 million)
- 10% of desktop macOS users (between 16 and 24 million)

So, we pick the lower figure of 236 million users worldwide, and we further reduce it to 200 million users worldwide to account for some duplications.



Personal Productivity Market (1)

Before 1995

Documents had to be printed to be shared

Between 1995 and 2005

- Evolution from sharing printouts (analog heritage) to sharing static digital documents (interoperability)
- Birth of cloud solutions for personal productivity, from Google (based on business model) and Microsoft (to find an alternative source of revenues from desktop)

Personal Productivity Market (2)

Between 2005 and 2010

- Availability of XML based document formats: development of the ODF standard and the OOXML pseudo-standard
- OpenOffice.org is the de facto FOSS alternative to MS Office

After 2010

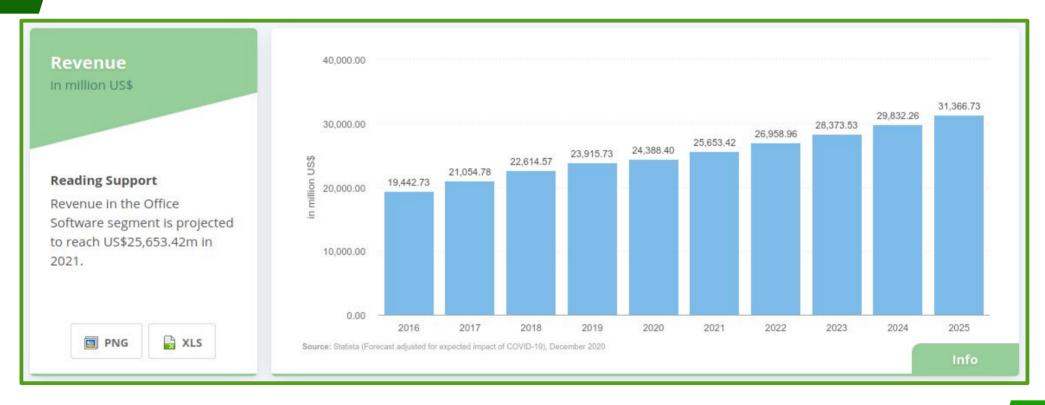
- Announcement of LibreOffice, based on ODF, while OOXML is the cornerstone of Microsoft lock-in strategy
- Several freeware office suites enter the market, while cloud based _office suites grow and evolve

Ubuntu 18.04 LTS Default Desktops Applications Survey Office Suites Category LibreOffice ■ Google Apps WPS Office ■ Apache OpenOffice ■ Microsoft Office Latex ■ Web OnlyOffice ABI Word Calligra ■ FreeOffice Suite ■ GNUmeric Emacs Others

Office Suites Lifecycle

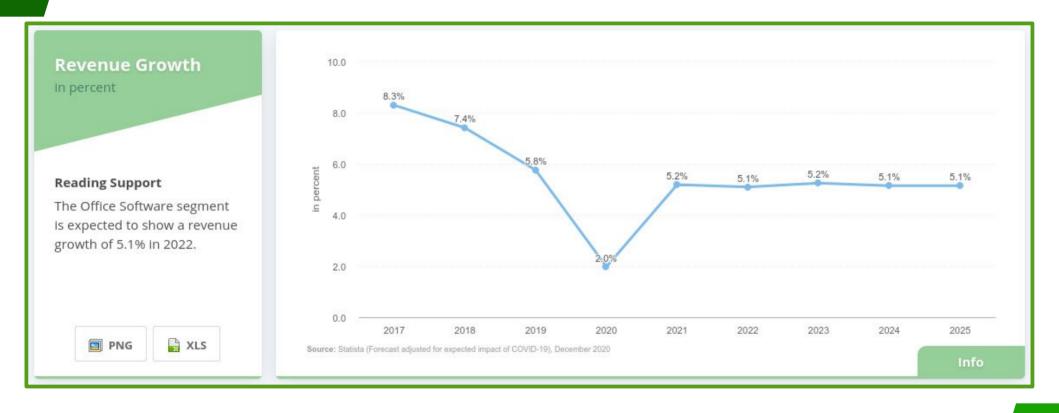
- Office Suites are mature products seen as a commodity by most users (and as such their price might be an issue)
- Although they are a mature product, they will not decline as long as PCs will exist or a different paradigm will be developed (for the time being, there is nothing similar on the horizon)
- The growing attention for digital sovereignty might infuse new life on office suites, but users have to be educated about the importance of standard document formats

Office Suites Market: Revenues





Office Suites Market: Growth



LibreOffice Project Model

- The Document Foundation represents the community, provides the projects' governance, owns trademarks and Internet domains, and collects donations which support the activities of community members
- The community, with volunteer contributors and corporate sponsored contributors, is managing development based on resources provided by The Document Foundation
- The Document Foundation is a charitable organization, and as such is not supposed to release commercial software



LibreOffice Stakeholder

- Community Members
 - High personal involvement (volunteering)
 - High project value (the project I am contributing to)
- Users
 - No personal involvement (free product)
 - Low product value (office suites are a commodity)

Some Numbers

- Based on data extracted from Git, developers sponsored by ecosystem companies provide 68% of all activity on the source code, while volunteers provide 28%
- Based on donation numbers, 90% are from individuals and 10% from SMBs
- Based on estimates, less than 5% of LibreOffice enterprise users contribute in any way to the project, including buying any kind of product/service from ecosystem companies

Background Thoughts

- The global open source ecosystem has evolved since 2010, and there have been lengthy discussions about the relationships with business using OSS without contributing back to OSS projects
- In 2014, the discovery of the Heartbleed Bug was a turning point to raise the issue of OSS sustainability
- In 2016, Nadia Eghbal published the paper "Roads and Bridges: the Unseen Labor behind our Digital Infrastructure"
- In 2019, Dries Buytaert published the blog post: "Balancing Makers and Takers to Scale and Sustain Open Source"



Excerpts from Dries Buytaert (1)

- Defining Open Source Makers and Takers
- Some companies are born out of OSS, and as a result believe deeply and invest significantly in their communities. With their help, OSS has revolutionized software for the benefit of many. Let's call these types of companies *Makers*.
- Now that OSS adoption is widespread, lots of companies, from technology startups to technology giants, monetize OSS projects without contributing back to those projects. Let's call them *Takers*.
- The difference between Makers and Takers is not always 100% clear, but as a rule of thumb, *Makers* directly invest in growing both their business and the OSS project. *Takers* are solely focused on growing their business and let others take care of the OSS project they rely on.



Excerpts from Dries Buytaert (2)

- *Takers* reap the benefits of the *Makers*' OSS contribution [...]. The *Taker* is likely to disrupt the *Maker*.
- On an equal playing field, the only way the *Maker* can defend itself is by investing more in its proprietary offering and less in the OSS project.
- To survive, it has to behave like the *Taker* to the detriment of the larger OSS community.
- Takers harm OSS projects.
- An aggressive *Taker* can induce *Makers* to behave in a more selfish manner and reduce or stop their contributions to OSS.

Toxic Solutions not Based on OSD

- Cloud Protection Licenses
 - Commons Clause License (RedisLabs)
 - Server Side Public License (MongoDB, Elastic Search, GrayLog)
 - Confluent Community License (TimeScaleDB)
 - Business Source License (MariaDB, CockroachDB)
- Ethical Source License
 - Hippocratic License (Coraline Ada Ehmke)



SEPTEMBER 28, 2010

OpenOffice.org Community announces The Document Foundation

The community of volunteers developing and promoting OpenOffice.org sets up an independent Foundation to drive the further growth of the project

The brand "**LibreOffice**" has been chosen for the software going forward





the community, backed by several ecosystem companies, takes control to relaunch the innovation and develop LibreOffice a self sustaining project, supported by a solid business ecosystem today risk of abandon **OpenOffice** by Oracle after 10 years of continuous growth backed by

Sun and community

THE COMMUNITY, BACKED BY SEVERAL **ECOSYSTEM COMPANIES, TAKES CONTROL** TO RELAUNCH THE INNOVATION AND DEVELOP A SELF SUSTAINING PROJECT, SUPPORTED BY A SOLID BUSINESS ECOSYSTEM



IN A NUTSHELL

We decided to create a new foundation because none of the existing ones was backing our vision:

an independent FOSS project where the community and the ecosystem work together to make it self sustainable, without the need of a corporate sponsor or a license tweak



The Document Foundation

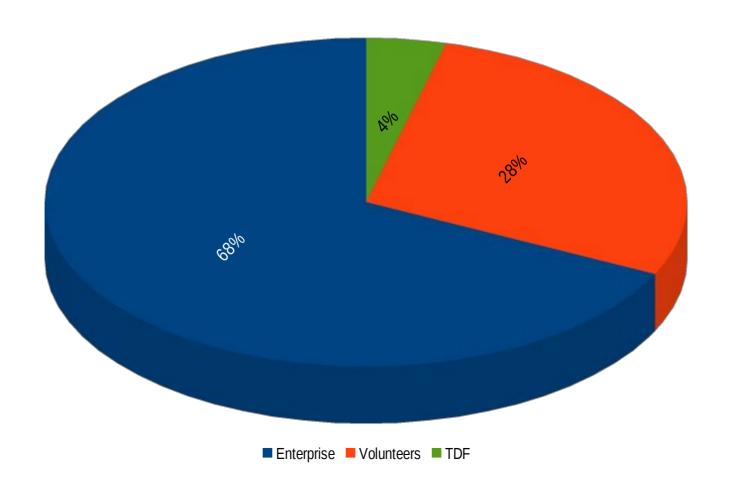
The Document Foundation promotes a **sustainable**, independent and meritocratic community for the gobal **development** of **free and open source** software based on **open standards**



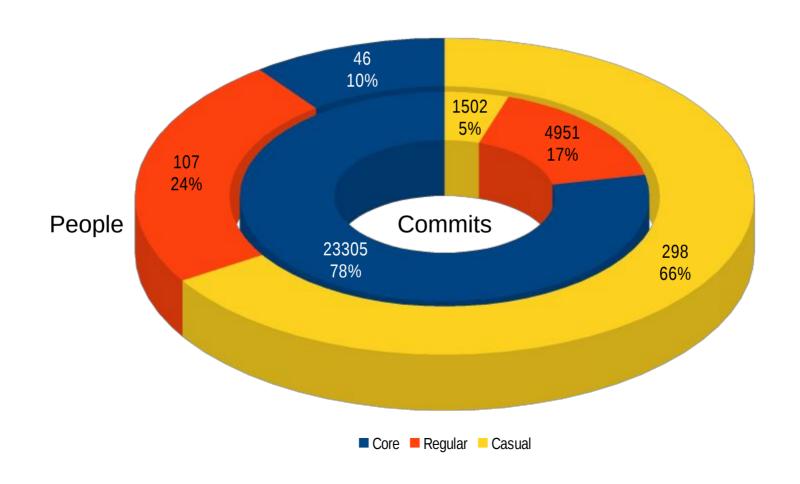
After 10 Years

- The Document Foundation has reached its objective, and is recognized as a leading FOSS foundation
- Thanks to the combined efforts of the entire project, with contributions from community and ecosystem, we have released LibreOffice for desktop, online and mobile
- We are proud of being recognized by the LibreOffice brand name, which represents the common asset for community and ecosystem members (with a large number of people being active in both areas)

Development Last 2 Years



All Contributions Last 2 Years



Comment on Chart Numbers

- **Development**: around 68% of contributions to the source code are from ecosystem companies, while volunteer contributions are 28% (TDF is just 4%)
- Community: developers paid by ecosystem companies are around 40, so an extremely large portion of the 78% of "core contributions" is paid by ecosystem companies
- Consequence: without contributions from the ecosystem, we would have issues in keeping up with user expectations

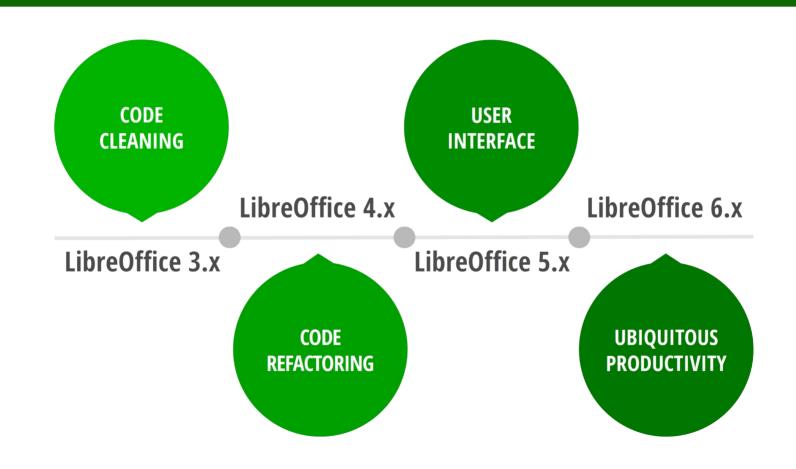
Who Pays LibreOffice Development?

- 68% of development is paid by customers of ecosystem companies selling a LibreOffice Enterprise product
 - The majority of this activity is focused on new features and improvements to interoperability
- 28% of development is provided by volunteers, and paid by their willingness to contribute to the project
 - A large percentage of this activity is focused on the UX (user interface and usability)

Evolution of LibreOffice Ecosystem

- 2010 2014
 - Growth of ecosystem companies
 - From 20 to 60 full time paid developers
- 2014 2017
 - Loss of several ecosystem companies
 - From 60 to 40 full time paid developers
- 2017 2020
 - Stable number of ecosystem companies

Development Cycles



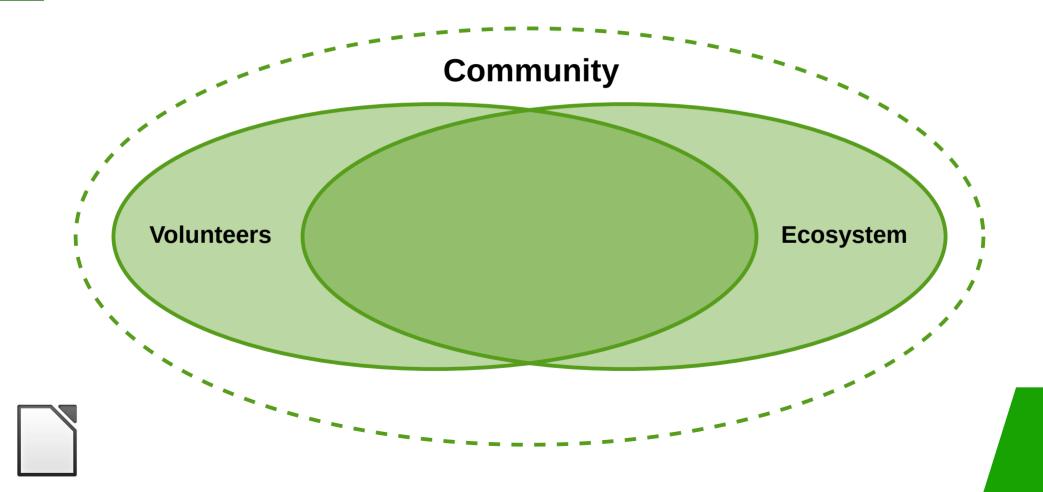
Where Are We Today

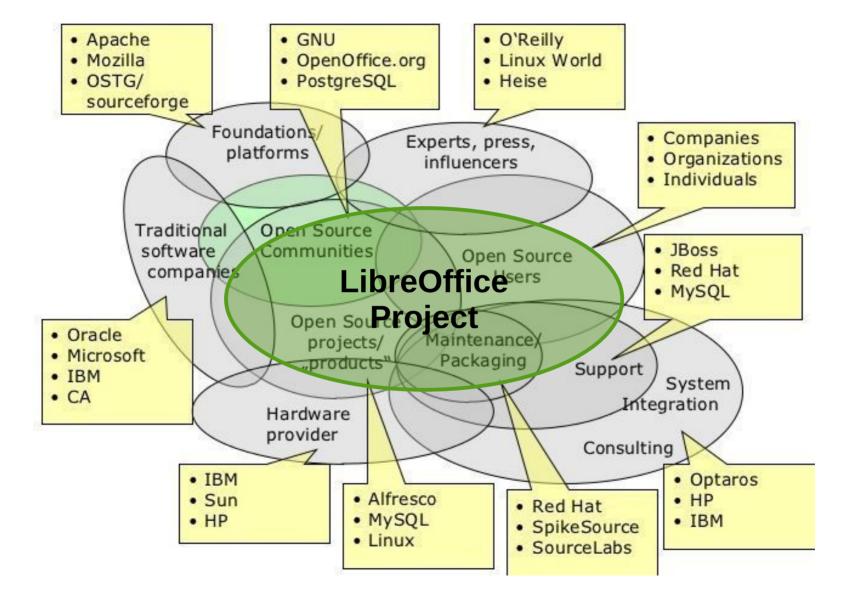
- The community is growing and is extending its reach
- The ecosystem is not growing as much as the community
- Relationships between ecosystem and community are not ideal, and risk to create issues left and right, which are not beneficial for the health of the project
- A growing number of community members is not aware of the roots of the project, and while providing enthusiastic contributions may also create frictions
 - Together, we must develop a new strategy for the next decade,
 to support the growth of the project

LibreOffice Project

- Ideally positioned in the FOSS environment
 - Available for desktop, cloud and mobile platforms
 - Native support of the best standard document format
 - Best-in-class support of Microsoft Office documents
 - Support of other legacy proprietary formats
- Only viable FOSS alternative to Microsoft Office
- Sits at the crossroads of FOSS ecosystems

LibreOffice Project





Objectives

- Provide the best FOSS office suite
 - Leveraging the strength of LibreOffice brand
 - Educating users, from individuals to organizations, about the values and the needs of a self sustaining FOSS project
 - Finding the right balance between the free product and the enterprise supported product
- Underline the peculiarities of the LibreOffice project
- Improve transparency of decisions and process

LibreOffice USP

- The best open source office suite ever
- Backed by a strong community and a strong ecosystem
- Providing the standard document format for interoperability and digital sovereignty, and a superior compatibility with proprietary document format
- The best of open source, with professional support available for the organizations using office productivity for production and management of strategic business contents

Next 10 Years

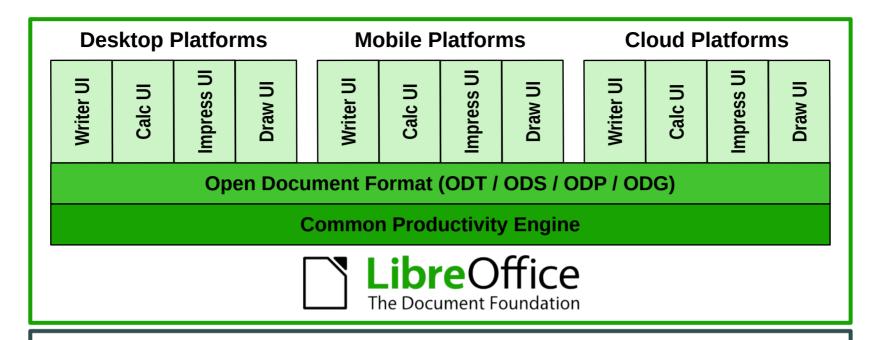
- Use the LibreOffice Technology ingredient brand, to stress the platform difference/advantage over other office suites
- Reduce the perception that The Document Foundation is a software vendor, providing support and other services
- Communicate with a coordinated strategy to make it easier for users to understand which is the best LibreOffice version for their needs

LibreOffice Technology

- LibreOffice Technology is the result of 10 years of development in the right direction
 - Same processing engine common to all modules
 - Based on a cleaned and refactored source code
 - With a focus on code quality and consistency
 - Supported by easy and extensive APIs
- The best open source platform for personal productivity tightly integrated on desktop, mobile and cloud

LibreOffice Technology Webpage





WP UI	SS UI	PS UI
DOCX	XLSX	PPTX
WP Engine	SS Engine	PS Engine

WP UI	SS UI	PS UI
DOCX	XLSX	PPTX
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Desktop Platforms

Mobile Platforms

Cloud Platforms

Proprietary and Open Core Office Suites

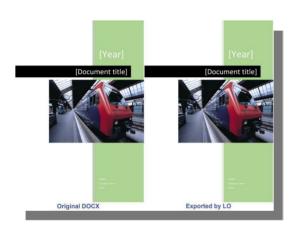
LibreOffice: Product to Platform

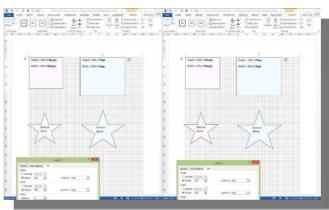
- 2010: LibreOffice only for the Desktop
- 2020: LibreOffice for the Desktop, LibreOffice LTS optimized for Enterprises, LibreOffice Online for the Cloud, LibreOffice Mobile for Android & iOS, and LibreOffice for Chrome OS
- All these products, from different organizations, share the same engine, which is common to all modules

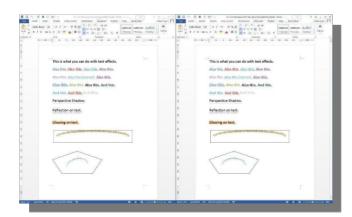
Steps from Product to Platform

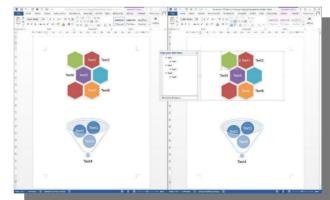
- Improvement of Development Resources
- Code Cleaning and Code Refactoring Activities
- Improvement of Performances and User Interface
- Use of Static Code Analisys and Fuzzing Tools to Improve Code Quality & Security
- Development of New Easy APIs and Macro Libraries
- Continuous Improvement of MS Office Interoperability
- Evolution of the Open Document Format Standard

Document Interoperability

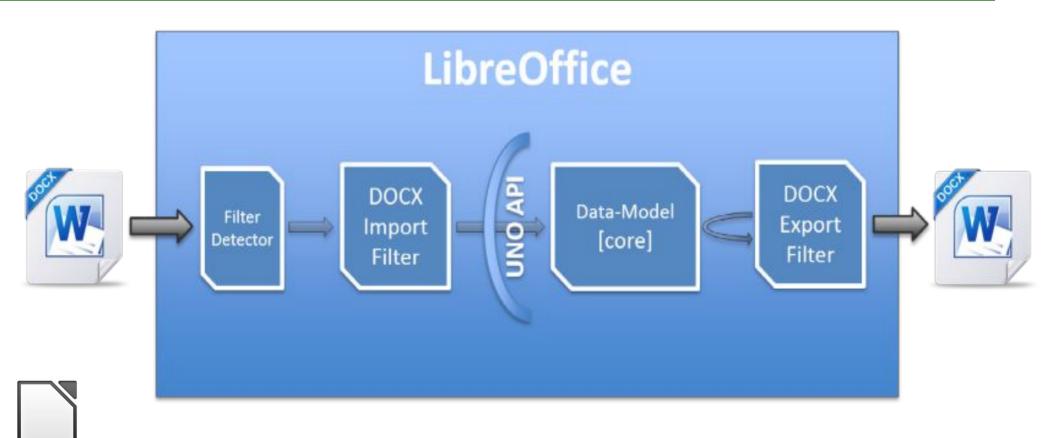








Roundtrip Test





Open Document Format

the true document standard which offers freedom of choice



Open Document Format

- **Independent** from a single product: anyone can write a software that handles an open format
- Interoperable: allows the transparent sharing of data between heterogeneous systems
- **Neutral**: it does not force the user to adopt, and often buy, a specific product, but leaves a wide choice based on features and quality versus price ratio
- Perennial: protects user developed contents from the "evolution" based obsolescence of technology



LibreOffice Technology Based SW

- Desktop (TDF, Red Hat & SUSE)
- Enterprise LTS (Collabora & allotropia)
- Online / Cloud (Collabora & allotropia)
- Android (Collabora)
- iOS & Apple Store (Collabora)
- Windows Store (allotropia)

Differentiate LibreOffice Desktop

- LibreOffice Community: forever free, from TDF
 - Supported by volunteers, ideal for individuals, small & medium size business and non profits/NGOs
- LibreOffice Enterprise: only from ecosystem members
 - Professionally supported, suggested for production environments in enterprises and large organizations

LibreOffice Versions & Users

Beta / RC

Early Adopters
Quality Assurance
Feature Testing
(power users)

Community

Community
Individual Users
SMB Deployments
(desktop users)

Enterprise

Enterprises
Large Migrations
Large Deployments
(professional users)

Current LibreOffice Users

- LibreOffice Community
 - Support with Donations: individuals, SMBs
 - Free Riders: many universities, many government organizations, many enterprises
- LibreOffice Enterprise
 - Purchase Product: some universities, some enterprises, some government organizations

What is LibreOffice Enterprise?

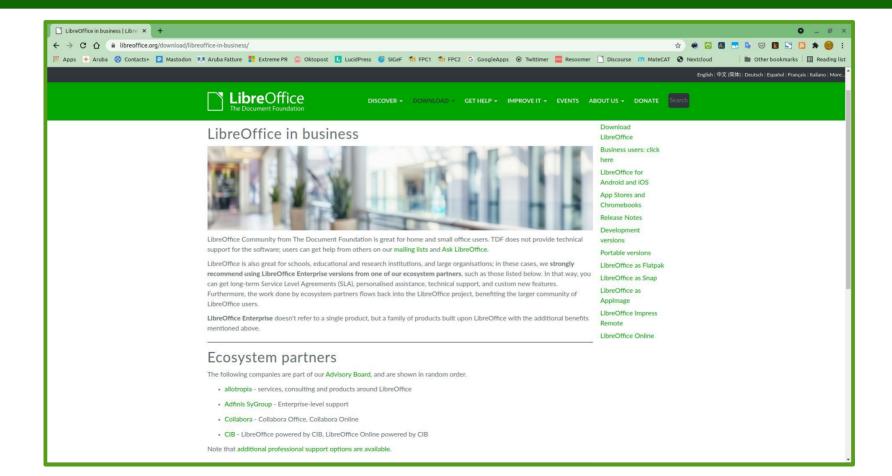
- LibreOffice Enterprise is not the name of a new product but the "family name" adopted by TDF for products provided by ecosystem companies
- For historical reasons, these products may not include LibreOffice in their name, so the "family name" will make it easy to associate them with LibreOffice, and leverage the brand recognition
- By having a "family name" which refers to different products based on the same technology, we avoid the risk of supporting a single commercial company



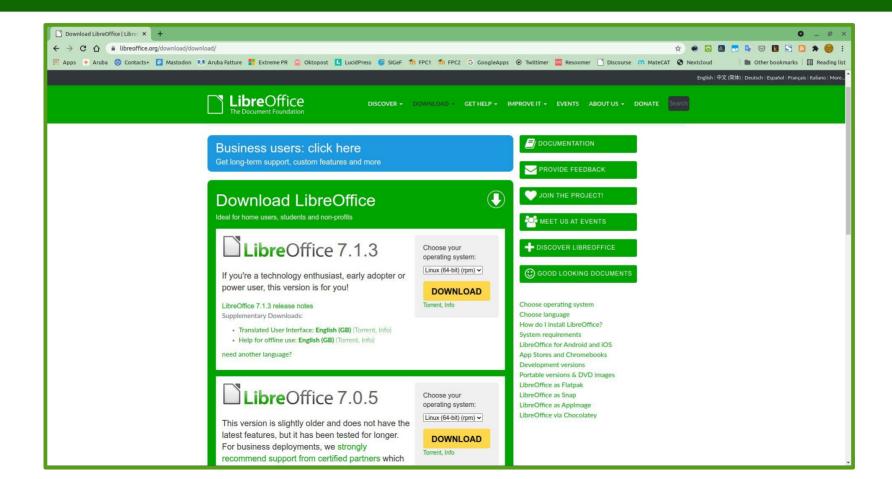
Support LibreOffice Enterprise

- LibreOffice in Business Webpage
- Improved LibreOffice Download Webpage
- LinkedIn: LibreOffice Enterprise Company Page
- Relaunch of LibreOffice Certification
- Registration of business oriented domains
 - https://libreoffice.business
 - https://libreoffice-ecosystem.business

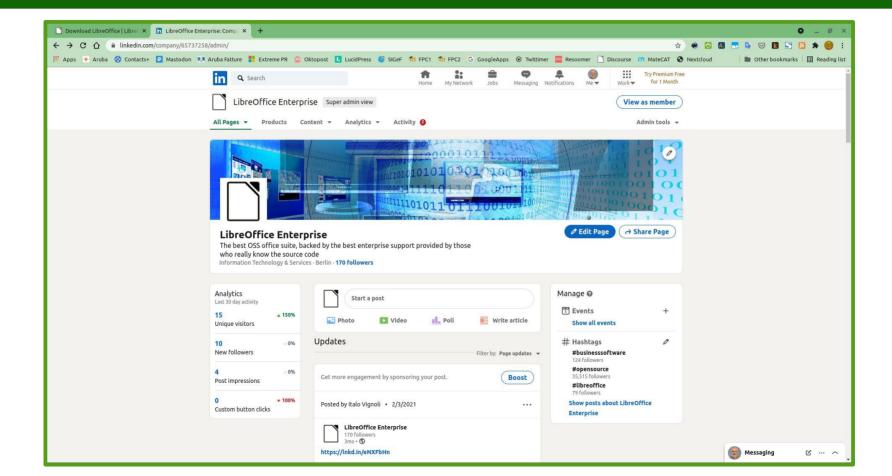
LibreOffice in Business Webpage



LibreOffice Download Webpage

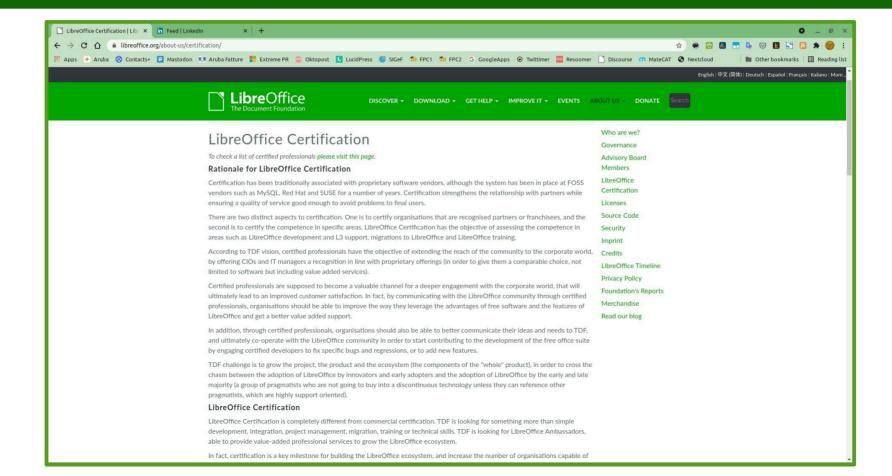


LinkedIn: LibreOffice Enterprise





LibreOffice Certification



Summary of Action Items

LibreOffice Technology

- White Paper
- Announcement
- Website Section
- Slide Deck

LibreOffice Enterprise

- Dedicated Webpage
- Improved Download Page
- Linkedin Company Page
- Business Websites

Summary of Action Items

Education Campaign

- Talks at Events
- By-Monthly Blog Post
- Bibliography/Webograpy about OSS Sustainability
- Interviews/Podcasts

Certification Marketing

- Promote the Certification Program
- Tips & Tricks provided by Certified Professionals
- Interview Certified Professionals
- Quarterly Webinar promoting LibreOffice Certification

Thanks

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