Ecosystem, Branding & Investment

Michael Meeks <michael.meeks@collabora.com>
General Manager at Collabora Office
@michael_meeks, mmeeks #libreoffice-dev irc.freenode.net

“Stand at the crossroads and look; ask for the ancient paths, ask where the good way is, and walk in it, and you will find rest for your souls...” - Jeremiah 6:16
Shape / Background / Goals

Taxonomy of incentives:

Brandining – why it’s important

Eco-sub-systems

Some updates on progress

A photo of an ecosystem:
  • TDF: should shepherd this.
  • Attack of the vegetarians!
  • Amazing diversity & beauty
  • Carnivores a problem ...
A project taxonomy

some incentives
Volunteers / Individuals

Community / Communality..

- Here to get valuable mentoring / learn
- Improved CV / Certification / Job Title
- Here to drive their native Language
- Here to contribute to Software Liberty
- Here to provide gratis gifts to the world’s poor
- Here because it’s fun contributing & working together as friends.
- NB. many staff in the wider ecosystem share some of these traits

Stills from: Steven Pinker – The Stuff of Thought– Language as a window into human nature, with thanks to the RSA and Cognitive Media
The rest of the ecosystem

Corporate contributors
Corporate non-contributors
Trainers
Migration experts
TDF / staff
Book authors / Misc ...

Stills from: Steven Pinker – The Stuff of Thought– Language as a window into human nature, with thanks to the RSA and Cognitive Media
Corporate Contributors

Reciprocity relationship with customers

- Customers pay money
- And get goods & services

Code published back as FOSS

- Developers embedded into the community.
- The good guys → we know these people.
- eg. Collabora, RedHat, CIB, Lanedo, Igalia, etc. ... thank you!

Contribution back:
- reduces maintenance cost
- motivates staff
- also
- marketing (?) and more.
Free LibreOffice Complements

Cheap Complements cf. Joel

- LibreOffice forms only part of their offer.
- Charging for services & support to contribute back to the code – cuts into the margin of their service
  - So don’t contribute back (to the code, i18n, etc.)

A Remarkably Popular model

- Free LibreOffice complements:
  - **Often**: Migration & Training.

A ‘Tag’ – particularly simple way to clarify where that is ok.
Free LibreOffice Complements:

Free LibreOffice Complements

- from Billion dollar 1st world companies
- hosters left & right – deploying CODE
- to Individuals selling ‘support’

How does it work?

- File bugs under personal accounts in our tracker
  - try to get free support.
- Checkout the release-notes and/or roadmaps of contributors
  - Promote these as your roadmap to your customers.
  - Hope someone else fixes your bugs / issues.

I’m also talking about us:

- Un-supported OS
- Un-supported tools

This is a big problem; and I’m part of it.

Some amount of ‘gratis’ argument is really a free complement demand to not have to contribute.
Free Complements – example:

~zero contribution back

• “Good that they are distributing our software”
• Very far from the only people doing this → but have a pretty website.

Zimbra Docs New in 8.8.9+

Zimbra Docs is a complete, feature-rich office productivity suite integrated right into your Zimbra Web Client... available at no extra charge in Zimbra Network Edition 8.8.9+. You can now create and edit documents, spreadsheets and presentations right in Zimbra.
Under-cutting ~non-contributors

Competitive Tendering & FOSS

• Similar to Free-Complements
  • ‘leverage the community’ to reduce cost.
  • Bid very low – and hope someone else fixes the issues.
  • De-monetize & de-fund development this way.

Prominent examples around the world:

• In extremis gratis replacing paid ...
Differentiated low-contributors #4

Take the software & Differentiate

- Host it elsewhere, on an unclear base
- Ask for help / code fixes
- Raise Government funds – “Local Office”
- Publish code, in an ~un-usable form
- Don’t engage with the developer community
- Create a semi-proprietary local version

Popular in Asia: RedFlag, OxOffice (OSSII), etc.
TDF – Donation funded

Generalized Reciprocity?

• Expect people to donate / gift-giving.
• *We created*¹ & *gave you an Office Suite so join us & contribute to making it better*²

TDF is an economic entity in its own ecosystem

Donations are incredibly valuable

• TDF does lots of hard-to-fund-otherwise work.
• But still, a small %age of development work is donation funded.

Open Questions:
1. How important is perception of TDF’s creation of LibreOffice?
2. How Important is perception that donations improve the code?
Book authoring & more ...

Perhaps a smaller market here these days:

- Our documentation team fills much of this gap with print-ready manuals etc.
- Overall physical book sales are up though – something nice about paper

Selling books – a problem

- Fewer major releases of LibreOffice
  - Longer print-runs.
- Less UX change (requires re-making screenshots)
- Slower release schedule appreciated.

ODFAuthors

- Books
- Lulu
- Revenue helps fund docs

Other models eg. selling conference tickets:

- GNOME,
- Moodle

Selling news
Brands & Trademarks
Why do Brands / Trademarks matter?

Mac app-store - TDF TM agreement expires for a bit

Essentially the same software, but different brand.

LibreOffice Vanilla

lost ~150 seats /week ~10x

Collabora Office

18 seats – in ~1 week
We know the branding problem well:

We spent a lot of time & effort building OpenOffice up

- Only to see it used against us & it’s users.

TM → the point of proprietization in FLOSS projects
Brand / Trademark – a peg to explain value

So let's all use the LibreOffice brand for all products?

Extreme commoditization

No differentiation:

Working out what our brands mean.
Eco-sub-systems ...
Yet another economics primer ... 

TINMF → There Is No Money Fairy
A virtuous cycle: product company

Investment → Jump Start → Development → Sustainable customer delight

Marketing → Leads → Sales

Multi-year delay ...
A vicious cycle: product company

- **Investment**
- **Jump Start**
- **Development**
- **Sales**
- **Marketing**

Leads: Multi-year delay...

collaboraonline.com
The LibreOffice “Desktop” cycle:

- Investment
- Jump Start
- Development

Community Marketing

Find out why millions can pay nothing!

0.05% leads

Sales

Brand / Investment dis-connection, no ROI, no repeat investment

collaboraonline.com
Source only LibreOffice “Online”

Worked for some years:
some miss a ‘product’

Collaborate here, get your binaries elsewhere:

Semi-permeable membrane:
↔ code
← investment

Competitive war in the marketplace:
New board, new dynamic:

Discussion around injecting TDF into the marketplace too

A summary of (some) community desires, which may conflict:

- Want corporate investment → to drive feature/function
- Want LibreOffice branding
- Want Gratis, unlimited binaries from TDF,
- Don’t want effective moral suasion to buy:
  - don’t tell users they need to; perhaps tell them they should donate?
- Want to re-direct marketing / leads to diversify contribution
An awesome community of friends.

(who still disagree sometimes)
Some thoughts on board & community discussion

“Its a great idea to Nationalize the Oil industry!”

- Next day: will you invest in oil extraction? will you sell?
- Do you think you will get your money back / a fair price?
- Wonder what is next?
  - sell other that-country stock fast

Great news:

- Much cheaper to nationalize, having destroyed expectation of future return.

Problem:

- Having inclusive community discussion is clearly also good.
A marketing plan:

Perhaps some users should pay something

5% leads

Lots of good ideas
- Hard work from Italo & team
- Significant, widespread resistance to the concept
- Achievable – only by distressing or loosing some part of the community.

Even when deployed:
- Where do those leads go?
A (good) marketing plan:

Board Decides whom to send leads to:

- 5% leads

Perhaps some users should pay something

Community Marketing

Sales

Weak brands, tough to differentiate, commodity pricing

Robust algorithm based on real contribution (?)
Solution: A much simpler cycle:

- **Investment**
- **Jump Start**
- **Sustainable customer delight**

Multi-year delay ...

Online commits
By affiliation (last year)

Collabora

97%

Collabora

3218

Marketing

Sales

Leads

Development
Solution? → just promote LibreOffice from TDF!

Talking to marketing:
- Full of good ideas for corporate investment in growing the LibreOffice brand
- Few convincing ideas on coupling to a return

The Build The Love Strategy:
- Good things will come!
- Community members, over the years will promote your solutions to their friends / companies.
- Grateful when this does work - but ~small proportion
- Marketing to our own community: is a tiny %age of users.
Solution? → Nationalization by TDF

Make TDF a commercial / development company

• Hire a large permanent stuff
• Sell consultancy, services, support etc.
• Excitement of community management!

Problems (in addition to charitable purpose etc.):

• Community management == board involvement ...
  • Struggling in many ways, even to tender ...
• Central planning, single price-point / team / etc.
• Bootstrapping / cash ? → loose 90% of paid devs.
• Permanent end to external investment.
Other solutions? ...

Loosely Coupled 3rd party player

- Could fill a niche – like the PC / App-Stores
- Many looked at TDC: its’ loosely coupled !!!!
  - Ownership is better – or is it?
- Selling apps in app-stores & re-investing the proceeds in development

Issues:

- Gratis apps in PC / app-stores chew TDF’s donation from updates
- Does a privileged 3rd party with Product Brand chew up the whole ecosystem?
If this seems new, its not:
Not a surprise: talked about this for years:

Berlin – 2012

- “Interaction Anti-patterns”

The Economics of the Ecosystem are critical
- If we cannot get the flow of code & finance right – we fail;
- Free-riders need to join the community and enjoy the ride.
Not a surprise: keep talking about this ...

2013 → Milano - The Governance & Economics of the Ecosystem

2014 → Bern: Keynote: The Money-Fairy

A startling and crucial realisation

TINME: There Is No Money Fairy (for us)

Some employees / customers never grasp this.
- Someone else's problem ...
- Every Euro we spend: hiring developers, sponsoring conferences, evangelising & marketing LibreOffice
- Comes from satisfying a customer

A functioning LibreOffice ecosystem

Deployments

Long term support
Level 1-3 support
Local language support
Training + Migration

Features & bug-fixes & €

Long term support
Level 3 support
Space Awareness Certification

One model with a smooth flow of funding resulting in Features & bug-fixes in LibreOffice

libreoffice
Some Progress
& updated stats
LibreOffice from The Document Foundation is great for home and small office users. TDF does not provide technical support for the software; users can get help from others on our mailing lists and Ask LibreOffice.

LibreOffice is also great for schools, educational and research institutions, and large organisations; in these cases, we strongly recommend sourcing it from one of our ecosystem partners, such as those listed below. In that way, you can get long-term Service Level Agreements (SLA), personalised assistance, technical support, and custom new features. Furthermore, the work done by ecosystem partners flows back into the LibreOffice project, benefiting the larger community of LibreOffice users.

Ecosystem partners
The following companies are part of our Advisory Board, and are shown in random order.

- **CIB** - LibreOffice powered by CIB, LibreOffice Online powered by CIB
- **Adfinis SyGroup** - Enterprise-level support
- **Collabora** - Collabora Office, Collabora Online

Note that additional professional support options are available.
This year so far:

<table>
<thead>
<tr>
<th>PAGE URL</th>
<th>PAGEVIEWS</th>
<th>UNIQUE PAGEVIEWS</th>
<th>BOUNCE RATE</th>
<th>AVG TIME ON PAGE</th>
<th>EXIT RATE</th>
<th>AVG. GENERATION TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>download</td>
<td>15,613,479</td>
<td>12,348,662</td>
<td>21%</td>
<td>00:00:37</td>
<td>27%</td>
<td>0.77s</td>
</tr>
<tr>
<td>download</td>
<td>14,803,108</td>
<td>11,710,481</td>
<td>20%</td>
<td>00:00:36</td>
<td>26%</td>
<td>0.77s</td>
</tr>
<tr>
<td>libreoffice-online</td>
<td>165,218</td>
<td>125,408</td>
<td>50%</td>
<td>00:00:56</td>
<td>54%</td>
<td>0.7s</td>
</tr>
<tr>
<td>portable-versions</td>
<td>141,653</td>
<td>118,036</td>
<td>33%</td>
<td>00:01:10</td>
<td>70%</td>
<td>0.69s</td>
</tr>
<tr>
<td>libreoffice-in-business</td>
<td>72,725</td>
<td>61,755</td>
<td>45%</td>
<td>00:00:41</td>
<td>21%</td>
<td>0.7s</td>
</tr>
<tr>
<td>libreoffice-from-microsoft-and-mac-app-stores</td>
<td>76,962</td>
<td>60,788</td>
<td>41%</td>
<td>00:00:45</td>
<td>30%</td>
<td>0.66s</td>
</tr>
<tr>
<td>pre-releases</td>
<td>68,117</td>
<td>54,572</td>
<td>52%</td>
<td>00:00:40</td>
<td>60%</td>
<td>0.64s</td>
</tr>
<tr>
<td>release-notes</td>
<td>43,270</td>
<td>36,889</td>
<td>48%</td>
<td>00:01:05</td>
<td>56%</td>
<td>0.65s</td>
</tr>
<tr>
<td>libreoffice-fresh</td>
<td>49,849</td>
<td>35,643</td>
<td>18%</td>
<td>00:00:34</td>
<td>21%</td>
<td>0.93s</td>
</tr>
<tr>
<td>android-and-ios</td>
<td>53,818</td>
<td>34,142</td>
<td>27%</td>
<td>00:00:45</td>
<td>64%</td>
<td>0.92s</td>
</tr>
<tr>
<td>android-viewer</td>
<td>24,528</td>
<td>17,800</td>
<td>44%</td>
<td>00:00:47</td>
<td>57%</td>
<td>0.56s</td>
</tr>
</tbody>
</table>
## Improvements in numbers

### More visibility: 280% growth ...

- *Exit rate ~up → 26k – hopefully to contribute somehow ...*

<table>
<thead>
<tr>
<th>Unique page-views</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>‘Exit’</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download</td>
<td>9,160,000</td>
<td>9,533,000</td>
<td>12,349,000</td>
<td></td>
</tr>
<tr>
<td>libo professional support</td>
<td>12,519</td>
<td>10,299</td>
<td>17,230</td>
<td>77%</td>
</tr>
<tr>
<td>tdf certified devs</td>
<td>1,386</td>
<td>1,557</td>
<td>1,756</td>
<td></td>
</tr>
<tr>
<td>libo in business</td>
<td>0</td>
<td>9,748</td>
<td>61,755</td>
<td>21%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>13,905</strong></td>
<td><strong>21,604</strong></td>
<td><strong>80,741</strong></td>
<td></td>
</tr>
<tr>
<td>Percentage of total ...</td>
<td>0.15%</td>
<td>0.23%</td>
<td>0.65%</td>
<td></td>
</tr>
</tbody>
</table>
Collabora Productivity

Visualizing 0.65%

Web interest to Ecosystem

Commits

% 2018

% 2019

% 2020

collaboraonline.org
Good: Improved Framing
Good: Improved Framing
Moving towards a big grateful community:

HELPFUL Hero: gotta reboot the crashtest box at some point to pick the new kernel up; no urgency, any time you'd prefer?

HERO Helpful, there's a run underway so as soon at the next email from it appears in the dev list you could do it. I imagine tomorrow afternoon

HELPFUL ok!

HERO its marvelously faster than the old setup

HELPFUL you should thanks the adfinis folks :-) it made the rest faster also as each crashtest run was clogging up resources

* mmeeks hopes TDF thanked Adfinis publicly for that (!?)

HERO Nicolas's company, cool.

HELPFUL mmeeks: good question? you sit at the bod right? :-) hopefully director@ was cc'ed in the thread and not only hostmaster, otherwise better 6 months late than never
Conclusions

- Economics is important!
  - Oracle, IBM, RedHat, SUSE, Igalia, Lanedo, etc.
- Be aware of contributor’s economic interests.
- These significantly shape the project & investment
- Building a Commercial Product brand inside a non-profit is ...

- Build virtuous cycles
  - Those who contribute should be appreciated, and promoted
  - Those who strip-mine should be not
  - It should be fun & rewarding for companies to contribute to the project, as it should also be for individuals.

Oh, that my words were recorded, that they were written on a scroll, that they were inscribed with an iron tool on lead, or engraved in rock for ever! I know that my Redeemer lives, and that in the end he will stand upon the earth. And though this body has been destroyed yet in my flesh I will see God, I myself will see him, with my own eyes - I and not another. How my heart yearns within me. - Job 19: 23-27