



The changing face of Open Source

Percona

Research results – 23rd April 2021

Using open source software is imperative for most organizations, and keeping it ‘open’ is key for fostering innovation especially if contributions from cloud companies is lacking

100%

believe that using open source provides benefits for their organization

58%

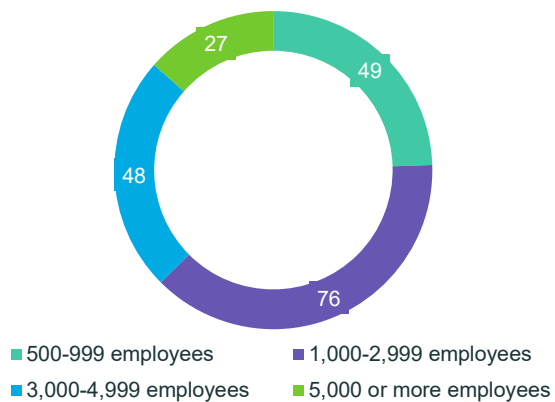
cite competition from public cloud companies who use open source projects but don't contribute back within their top three biggest challenges currently being faced by open source companies

96%

agree that open source software encourages more innovation compared to proprietary models

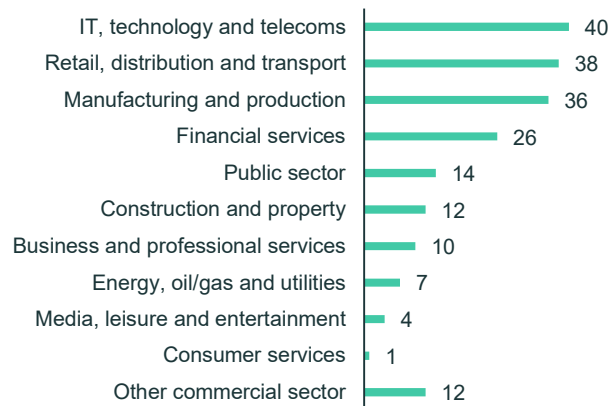
200 US IT decision makers were interviewed in March and April 2021, split in the following ways...

...by size



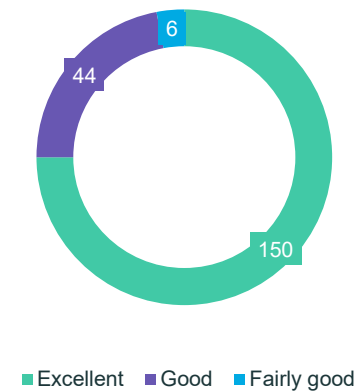
How many employees does your organization have globally? [200]

...by sector



Within which sector is your organization? [200]

...by knowledge of open source



Which of the following best describes your knowledge of open source databases? [200]

Please note: it is not recommended to report on statistics where there are fewer than 30 respondents within the split

200 US IT decision makers were interviewed in March and April 2021, split in the following ways...

...open source databases ever used



Which of the following open source databases have you used as part of your role in any organization? [200]

...open source databases currently used



Which of the following open source databases are currently being used within your organization? [200], omitting some answer options

Please note: it is not recommended to report on statistics where there are fewer than 30 respondents within the split

Story summary

- The importance and staying power of open source technology is apparent and the recognized benefits compound the importance of maintaining open source licenses
- Competition from public cloud companies who use open source projects but don't contribute back is a challenge currently being faced by open source companies, so the threat of public cloud companies not contributing to the open source community is apparent
- Keeping open source technology open for everyone to benefit from is hugely important

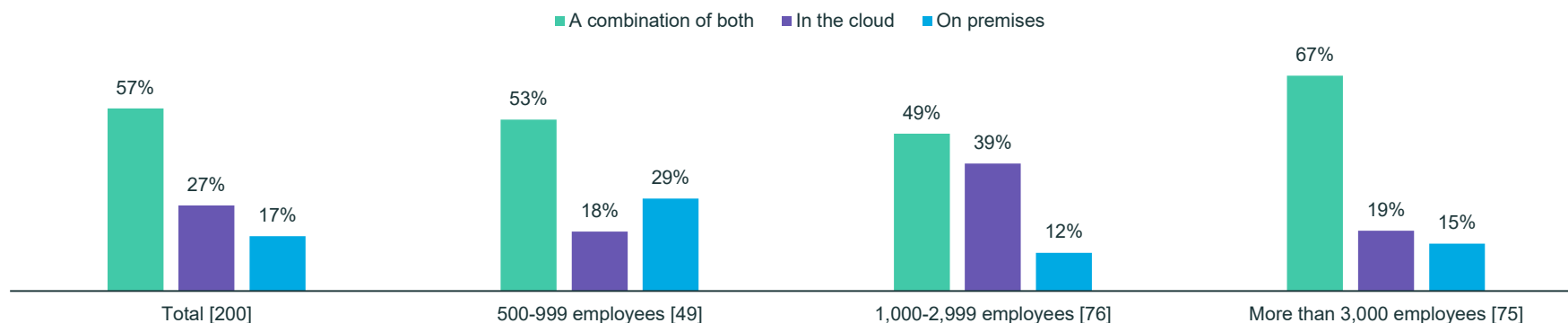


Areas of interest:

1. The current state of open source
2. The importance of contributing
3. Appendix – public cloud's involvement in open source
4. Appendix – additional charts

1. The current state of open source

A combination of cloud and on premises is the most popular approach, no matter the size of the organization



Where does your organization run its databases and applications? [base sizes in chart], omitting some answer options, split by organization size

It's clear that surveyed organizations are in transition with their cloud transformation journey. This is apparent as they are less likely to be using each environment in isolation and more likely to use a combination of cloud and on premises to run their databases and applications. This could be driven by the need to transition completely to a cloud environment or by the fact that a hybrid environment is preferable. Either way, it highlights a complex IT environment is in use for most

Cloud costs have increased over the last 12 months, which could be a result of the recent worldwide disruption

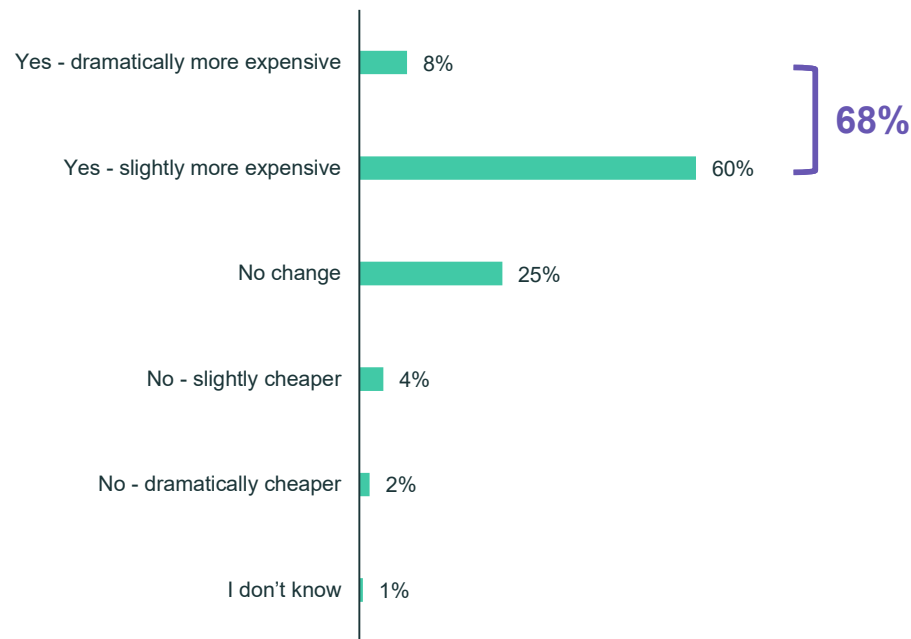
While increasing costs year on year is generally expected, there may be an even steeper climb as a result of the pandemic

Over the course of the last 12 months, organizations have been forced to adapt, change and rethink their working environment as employees had to move from working in the office to working from home

As a result, pressure on flexible, fast and reliable technology mounted and more and more organizations will have moved to cloud to support this need. With that increase in demand, it is likely that comes with an increase in costs – supported by 68% who believe cloud infrastructure has become more expensive in this time

As more organizations transition to cloud [slide 8], the increasing costs could be a bump in the road for that cloud transformation journey

Percona – The changing face of open source

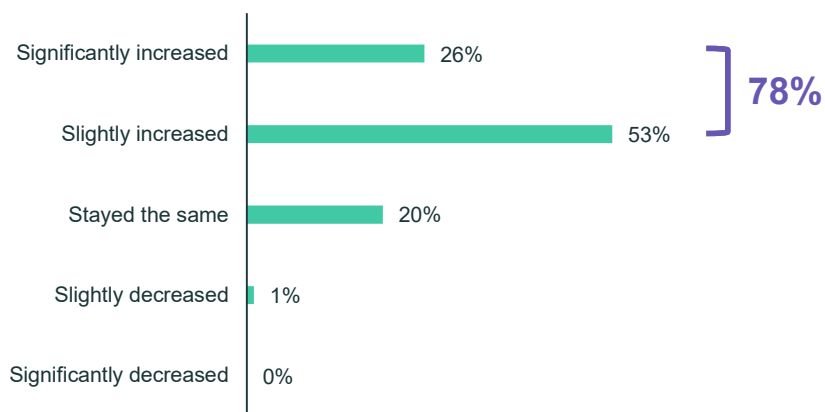


Have you noticed a change in your organization's cloud infrastructure costs over the last 12 months? [166], respondents from organizations that run at least some of their databases and applications in the cloud

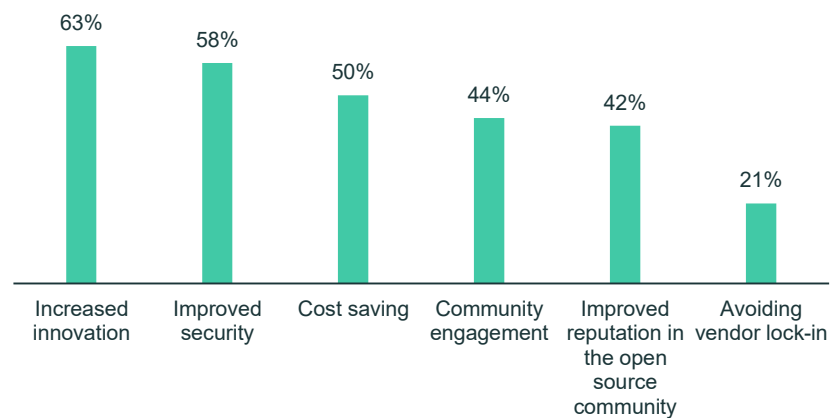


Open source software is proving its staying power, as there are a multitude of benefits for organizations

Open source remain as important as ever (or perhaps even more so) despite a disruptive 12 months. The use of open source software has increased, and organizations recognize its many benefits. Innovation is allowed to thrive in a community driven space, security needs can be met as changes to open source are welcome and savings can be made as open source is free. Therefore, the high demand for open source is still here and changes to the way open source operates could disrupt that success



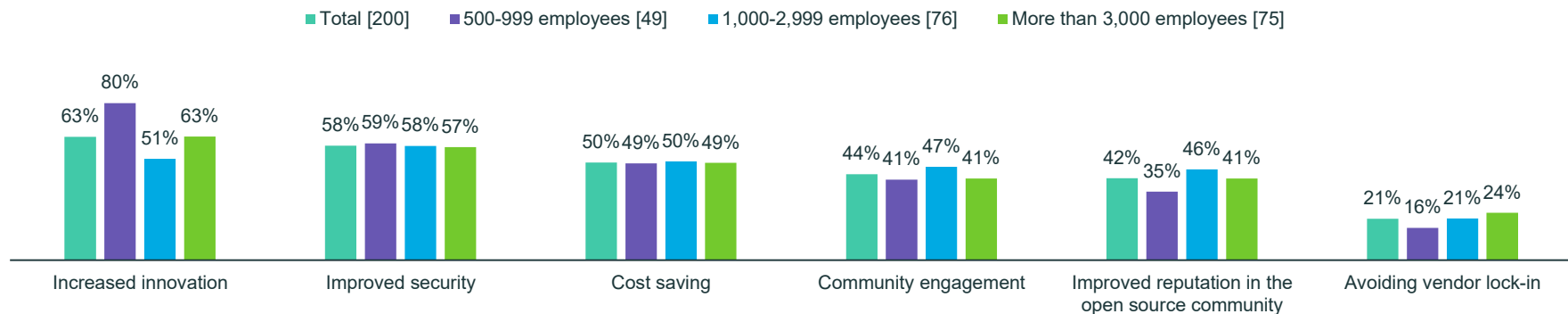
How has the use of open source software changed in your organization over the last 12 months? [200], omitting some answer options



Which of the following do you think organizations using open source benefit from? [200] omitting some answer options



The benefits of using open source vary depending on the size of organization

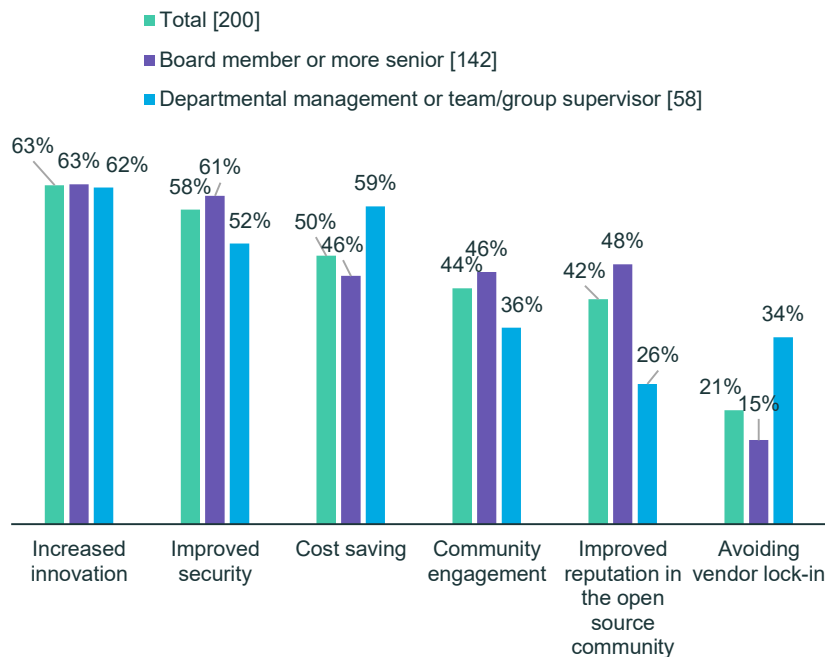


Which of the following do you think organizations using open source benefit from? [base sizes in chart] omitting some answer options, split by organization size

Slight nuances start to appear when considering the benefits of open source against organization size. The smaller organizations (500-999 employees) believe the biggest benefit to be increased innovation as they strive to grow and improve, playing catch up to the larger organizations. Whereas security and cost savings are equally beneficial across the board, underlining their importance to organizations, regardless of size

Community engagement is recognized as a benefit but not as substantially, which could be a cause for concern as a lack of engagement and contributions are a source of frustration for the open source community

Are there any differences when considering respondents' positions? →



Which of the following do you think organizations using open source benefit from?
[base sizes in chart] omitting some answer options, split by position

Although differences occur for position, innovation is a consistent benefit

Respondents who hold board member or more senior positions are more likely to see the benefit of community engagement and improved reputation in the open source community, over areas like cost savings. This highlights that the importance of the open source community isn't lost on more senior team members

Moreover, departmental management or team/group supervisors are more likely to believe the opposite as the benefit of cost savings take precedent over community engagement and the reputation within the open source community

Despite the differences across most benefits, increased innovation remains consistent no matter the position, compounding the argument that open source's main advantage is the ability to foster an innovative culture rather than being free for all to use

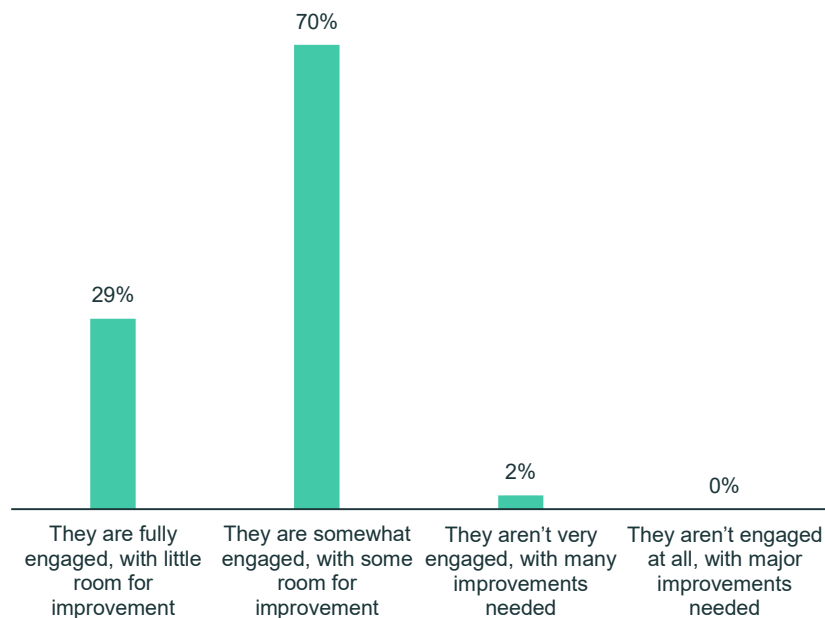


Engagement is high, but more could be done to improve it

The majority of respondents believe that open source companies have a good level of engagement with their contributing community. Something which organizations notice is a benefit of using open source [slide 12]

The more engagement organizations have with this community, the more they encourage innovation which, as a free service, will benefit all who use it as long as the open source community is able to stay open and welcoming

However, it is only 29% who would consider them to be fully engaged with no room for improvement, highlighting that more could be done in this area



Which of the following best describes the level of engagement that open source companies have with their contributing community? [200], omitting some answer options

However, is the open source community inclusive?



Although there are challenges, open source remains a hub of innovation

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Open source is a great place to foster innovation



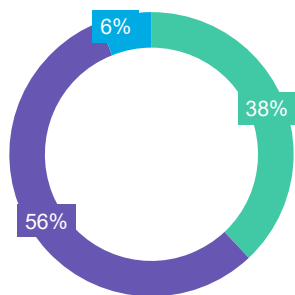
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Open source is on the rise despite all the obstacles

The open source community appears to be inclusive and supportive

Almost all respondents believe that the open source community is welcoming and inclusive, so at first glance it looks like there have been improvements in this community – something which can only help foster a better community spirit to spur on innovation and creation

However, the least common way of encouraging diversity is supporting recruitment from minority and disadvantaged groups (52% put this in their top three solutions), which suggests that while most consider the open source community to be welcoming and inclusive, one of the easiest ways to make this true is being utilized the least. Perhaps the open source community isn't as welcoming and inclusive as it first appears



■ Yes, very ■ Yes, fairly ■ No, they could do better ■ No, not at all ■ I don't know

Do you think the open source community is welcoming and inclusive? [200]



How should the open source community support and encourage diversity? Combination of responses ranked first, second and third [200], omitting some answer options

Do different sized organizations support diversity in different ways? →

There is consistency on diversity views across organization sizes, apart from in a few key areas

Across organization sizes there is an agreement that more could be done to support and encourage diversity, with consistent views on supporting mentoring projects and investing in and promoting educational resources. However, there is an inconsistency for improving retention and recognition for existing staff as well as supporting recruitment from minority groups – the latter being the most impactful for improving diversity within the community



How should the open source community support and encourage diversity? Combination of responses ranked first, second and third [base sizes in chart], omitting some answer options, split by organization size



The open source community needs to welcome diversity to encourage further collaboration

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I liked open source because it promotes collaboration between users

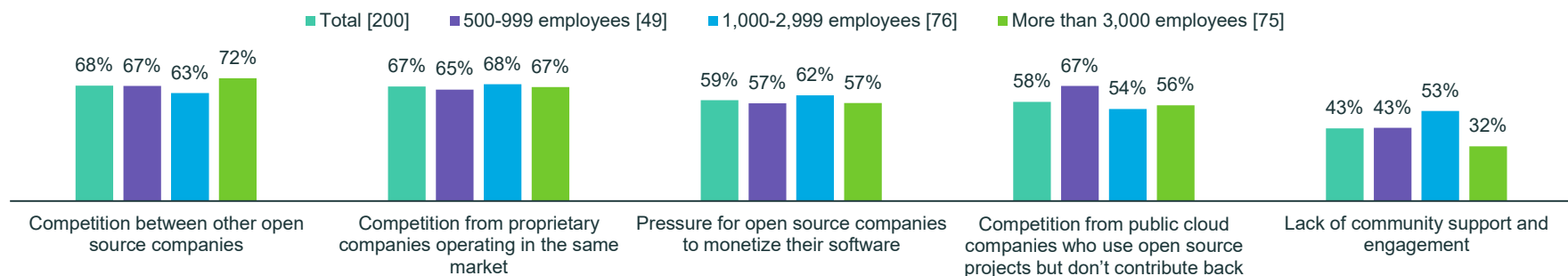


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Open source communities need more support to increase contributors' morale

2. The importance of contributing

Open source companies are currently facing various challenges



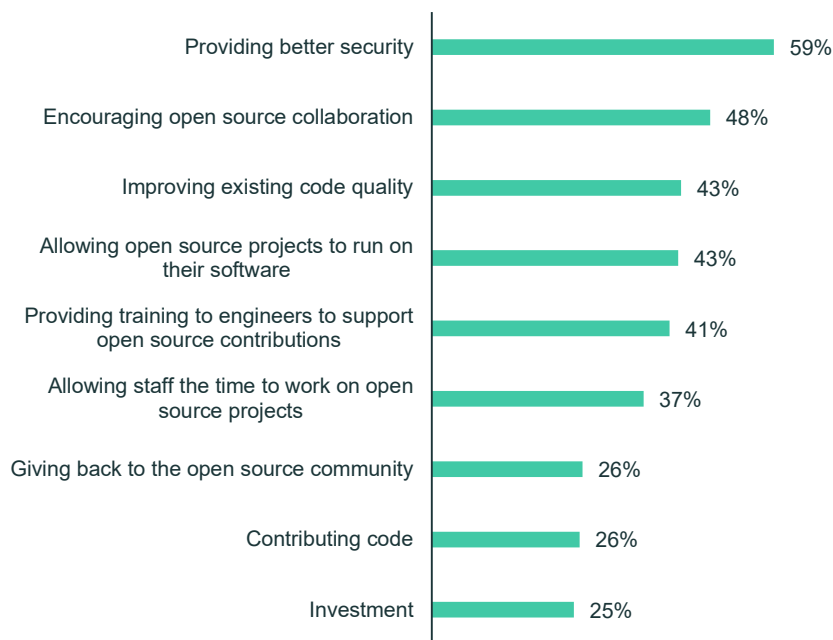
What are the biggest challenges open source companies are currently facing? Combination of responses ranked first, second and third [base sizes in chart], omitting some answer options, split by organization size

There are many challenges that open source companies are currently facing according to the surveyed IT decision makers, one of them being the public cloud companies who don't contribute to open source projects. The main challenges revolve around the fight to protect their innovation and to fight against public cloud organizations that want to monetize the resource without engaging with the community

Despite the appeal of source available licensing helping to push back against public cloud companies who do this, this mindset will punish those who do want to contribute and use open source as it is intended

What does the open source community need instead?





In what ways do you think public cloud companies should contribute to innovation in open source technology? [200], omitting some answer options

Contribution is key for public clouds to have a positive impact on open source



96%

Agree that open source software **encourages more innovation** compared to proprietary models

Some open source organizations could feel forced into moving to a proprietary model as public cloud organizations are putting pressure on them by monetizing open source software without contributing back

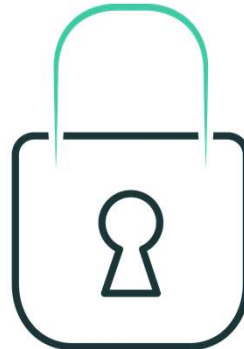
There are various ways in which public cloud companies should be contributing including providing better security, encouraging collaboration and improving existing code quality. If they don't engage, contribute and help innovate open source then they will struggle to find a welcoming reception



It's difficult to strike a balance between securing intellectual property and keeping open source “open”

“

I believe companies need to protect their intellectual property while **balancing** the open source availability

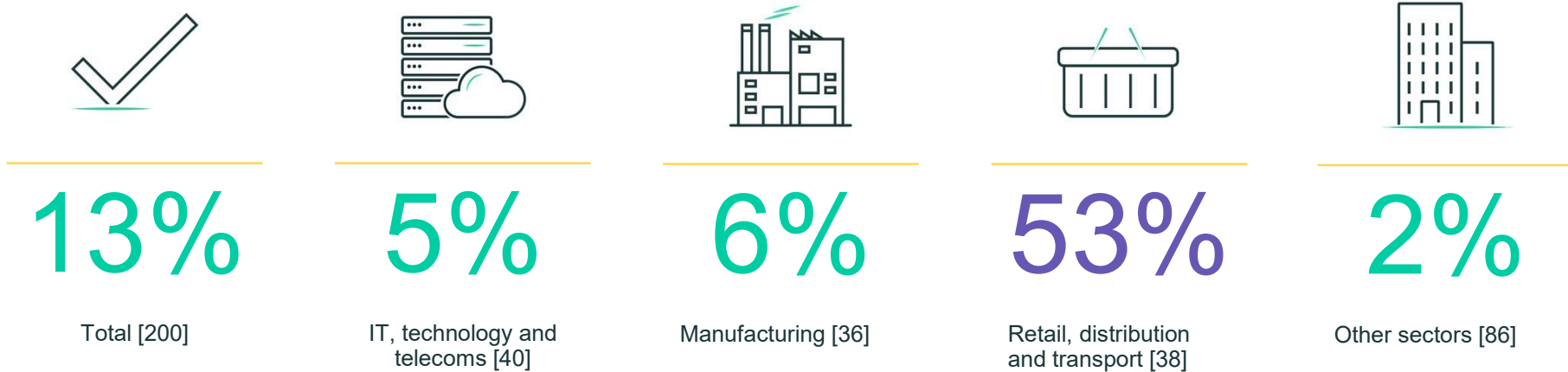


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Open source has to really **beef up** efforts to prevent back door hacking that exploits security vulnerability

3. Appendix – public cloud's involvement in open source

Despite the majority of respondents feeling positive towards public cloud’s input on open source, the retail, distribution and transport sector feel the potential dangers of their influence the most



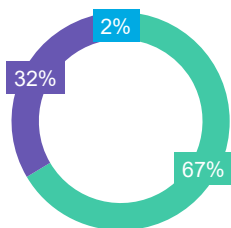
Analysis of respondents who believe public clouds are having a “very negative” or “quite negative” impact on open source technology [base in figure above], split by organization sector

Although on the surface it seems that public clouds are having a positive influence on open source technology, sectors such as retail seem to disagree; they have over half (53%) stating that public cloud companies are having a negative impact

How do respondents feel about open source licenses switching to source available licenses? 

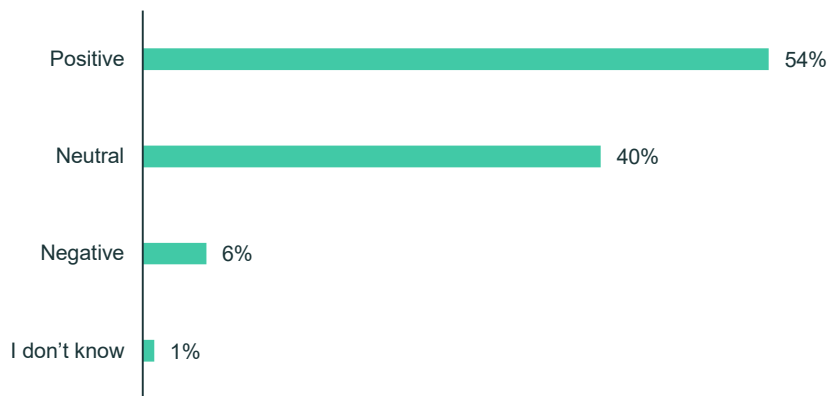
While positive on the whole, there is some uncertainty around open source companies switching to source available licenses

With many respondents being confident that they're aware of the differences between open source and source available licenses, they should be assured in their feelings towards open source companies switching to source available licenses. However, there are polarizing views on the issue suggesting that there is an overconfidence on the understanding of source available licenses, and that the positivity towards public cloud companies [slide 23] is unjustified as many agree that open source companies should be able to protect themselves against public cloud's influence, even if that restrictive license could lead to the downfall of a truly "open" open source



- Yes - I'm fully aware of the differences
- I mostly understand the differences, but I might need to do some research
- No - I didn't realize there was much difference

Do you understand the difference between open source licenses (like MIT, BSD and Apache, GPL) and source available licenses (like BSL and SSPL)? [200]

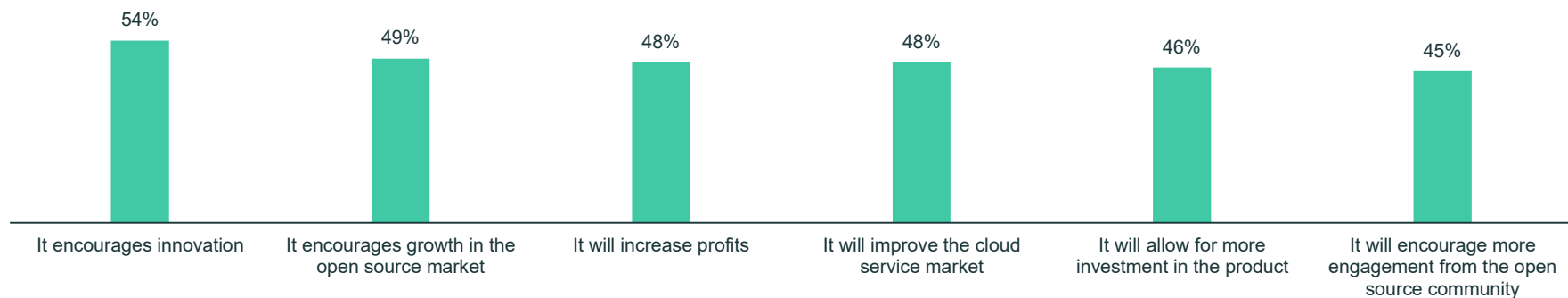


How do you feel about open source companies switching to source available licenses to deter cloud service providers from offering their software as a service for free (for example Elastic's move to an SSPL license)? [200]

What are the benefits of switching to source available licenses?



Multiple benefits are experienced as a result of switching to source available licenses



What are the benefits for the open source community if open source companies switch to source available licenses (such as BSL and SSPL)? [200], respondents that think organizations introducing source available licenses is positive or neutral, omitting some answer options

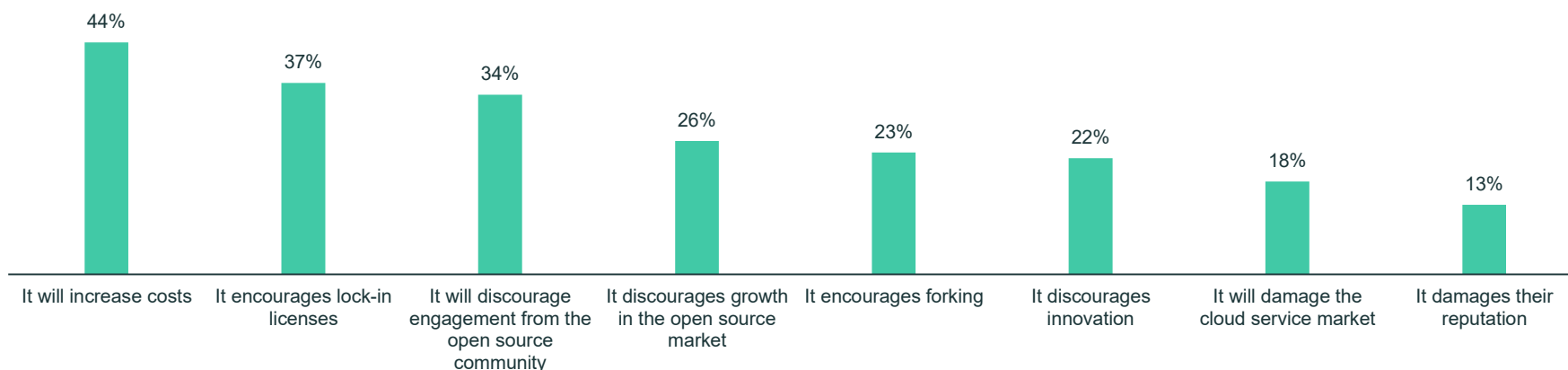
There is some confusion around what stand out benefit would be of open source companies switching to source available licenses for the open source community. No single benefit stands out which potentially highlights the disagreement of what the controversial switch would mean for the open source community, despite respondents being confident in their knowledge of the controversial topic [slide 24]

What are the drawbacks for the open source community if they switched to source available licenses?



The drawbacks could be damaging if more companies make the switch

Although there are potential benefits to the open source community [slide 25], the drawbacks might not be worth the risk. Inevitably open source companies switching to source available licenses would increase the costs and encourage lock-in licenses, which goes against what open source is supposed to be – open. If public cloud companies keep forcing their agenda onto the open source community, more and more open source software will be forced to make the switch which would dramatically harm open source



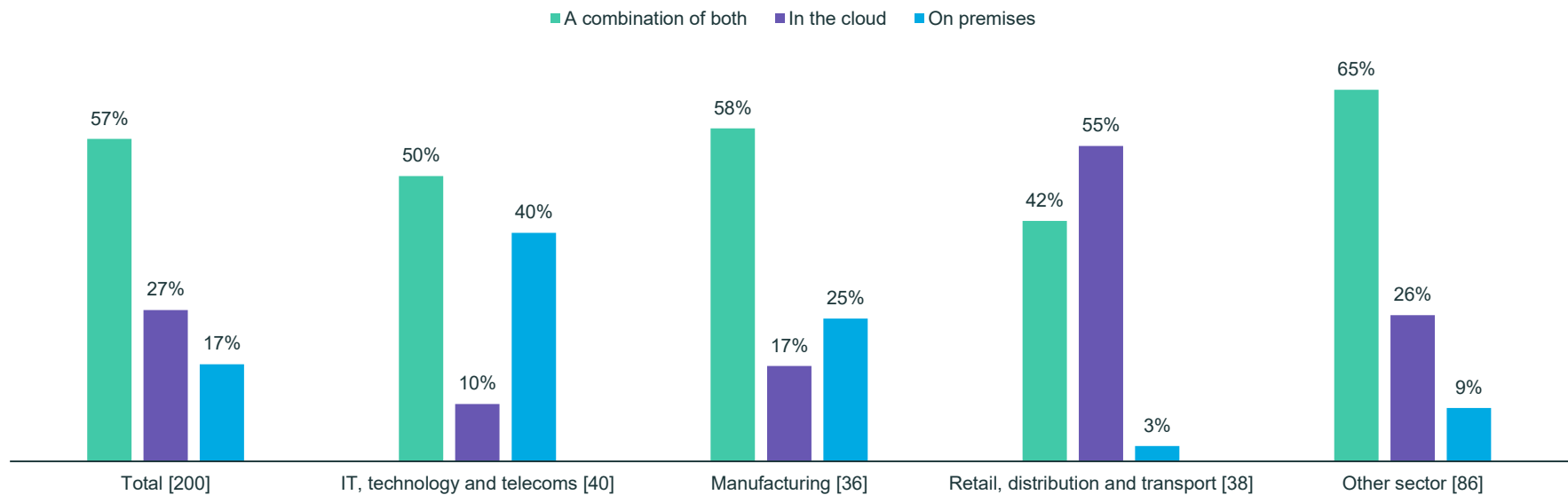
What are the drawbacks of open source companies switching to source available licenses (such as BSL and SSPL)? [90], respondents that think organizations introducing source available licenses is neutral or negative, omitting some answer options



4. Appendix – additional charts

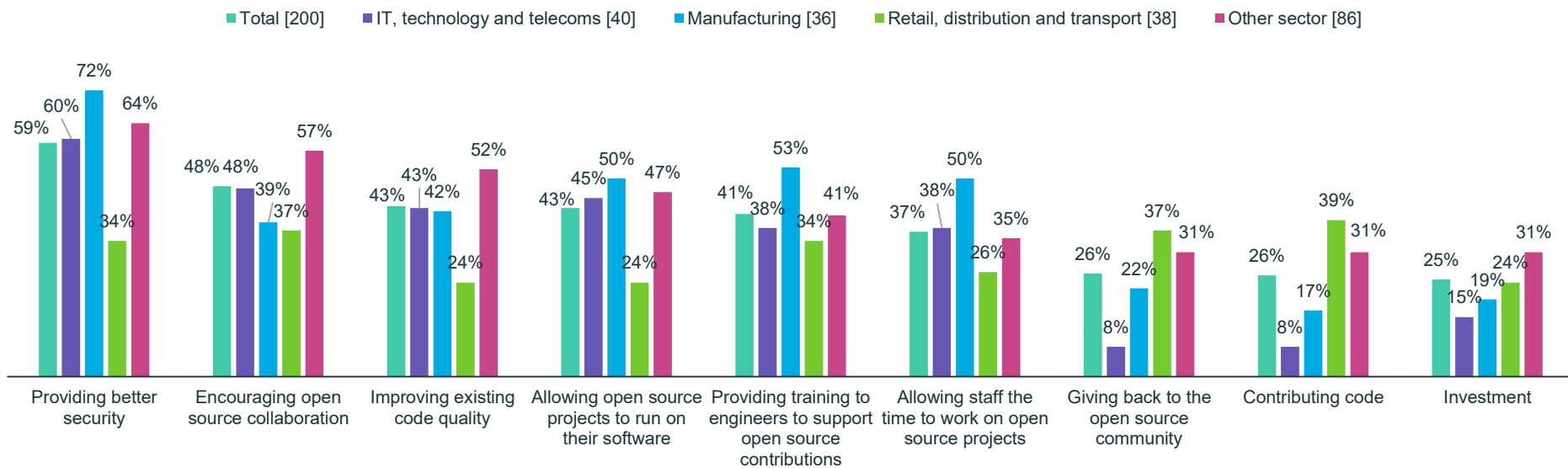


Organization's databases and applications location split by sector



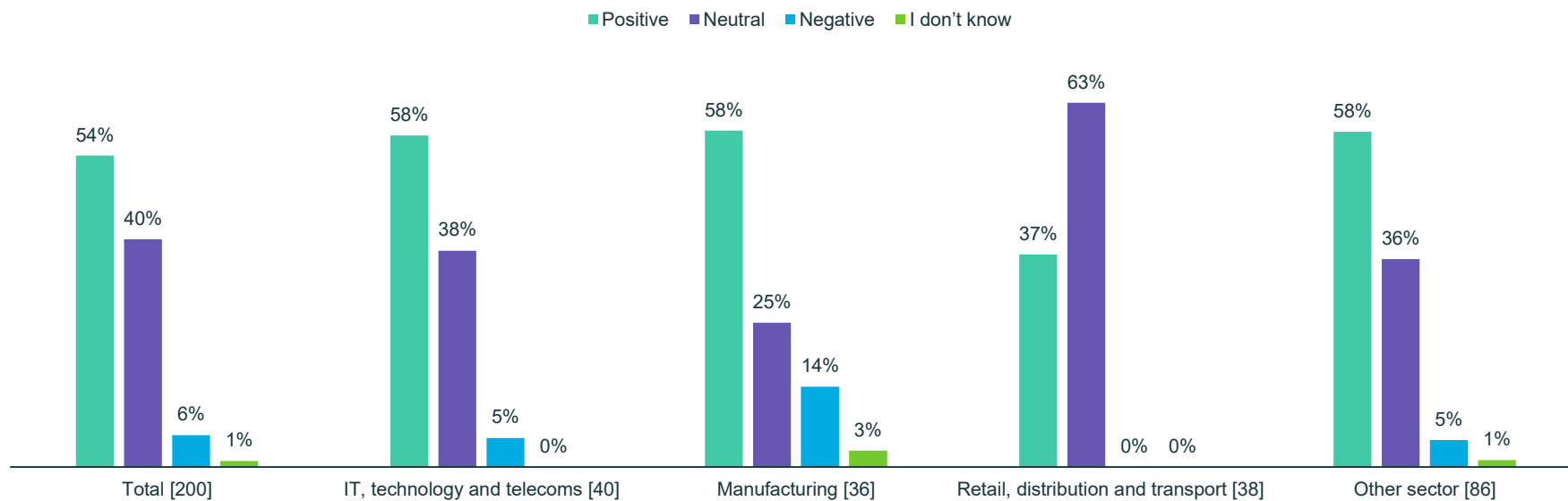
Where does your organization run its databases and applications? [base sizes in chart], omitting some answer options, split by organization sector

Public cloud's contributions split by sector



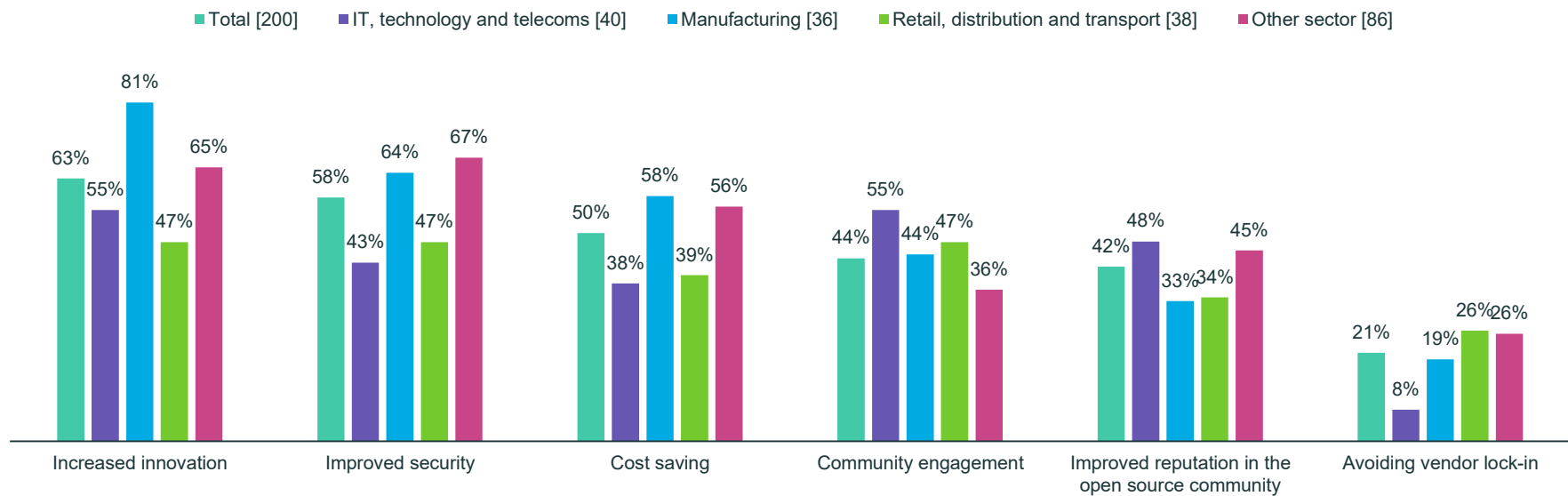
In what ways do you think public cloud companies should contribute to innovation in open source technology? [base sizes in chart], omitting some answer options, split by organization sector

Feelings towards source available licenses split by sector



How do you feel about open source companies switching to source available licenses to deter cloud service providers from offering their software as a service for free (for example Elastic's move to an SSPL license)? [base sizes in chart], split by organization sector

Open source benefits split by sector



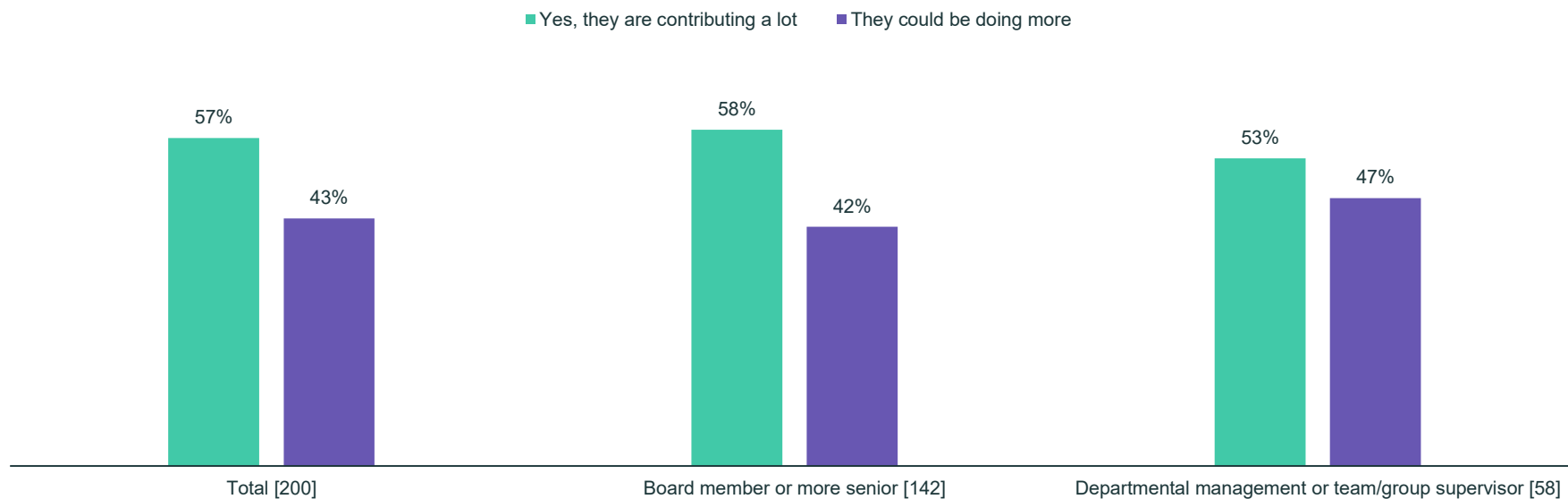
Which of the following do you think organizations using open source benefit from? [base sizes in chart] omitting some answer options, split by organization sector

Methods of encouraging diversity split by sector



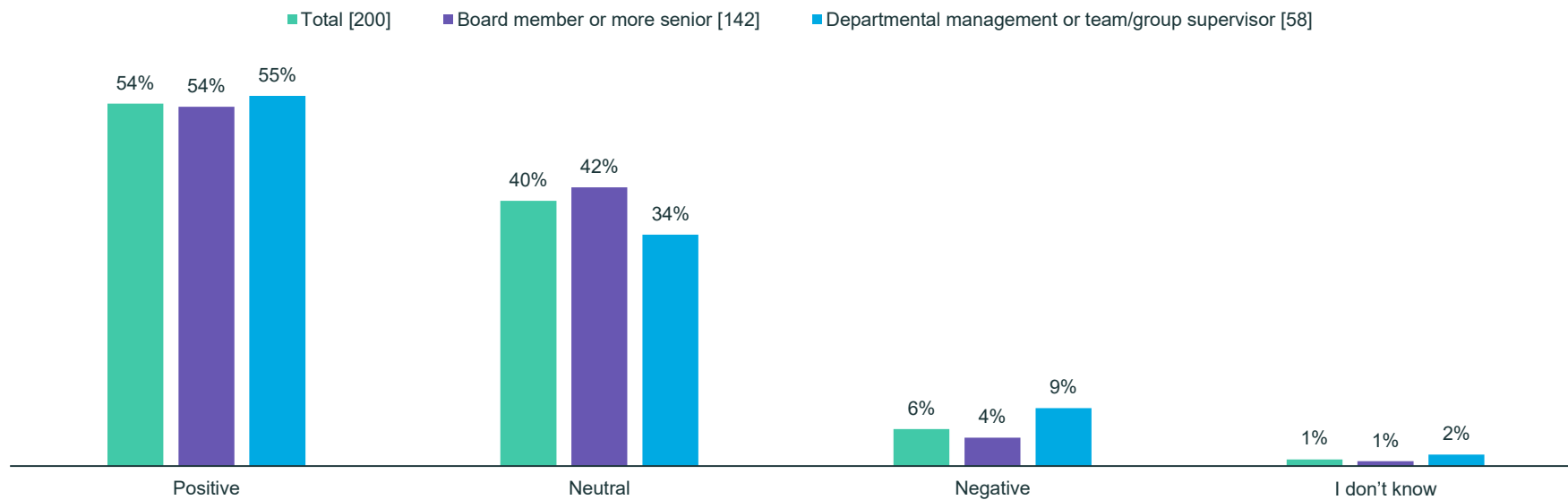
How should the open source community support and encourage diversity? Combination of responses ranked first, second and third [base sizes in chart], omitting some answer options, split by organization sector

Public cloud’s contribution split by position



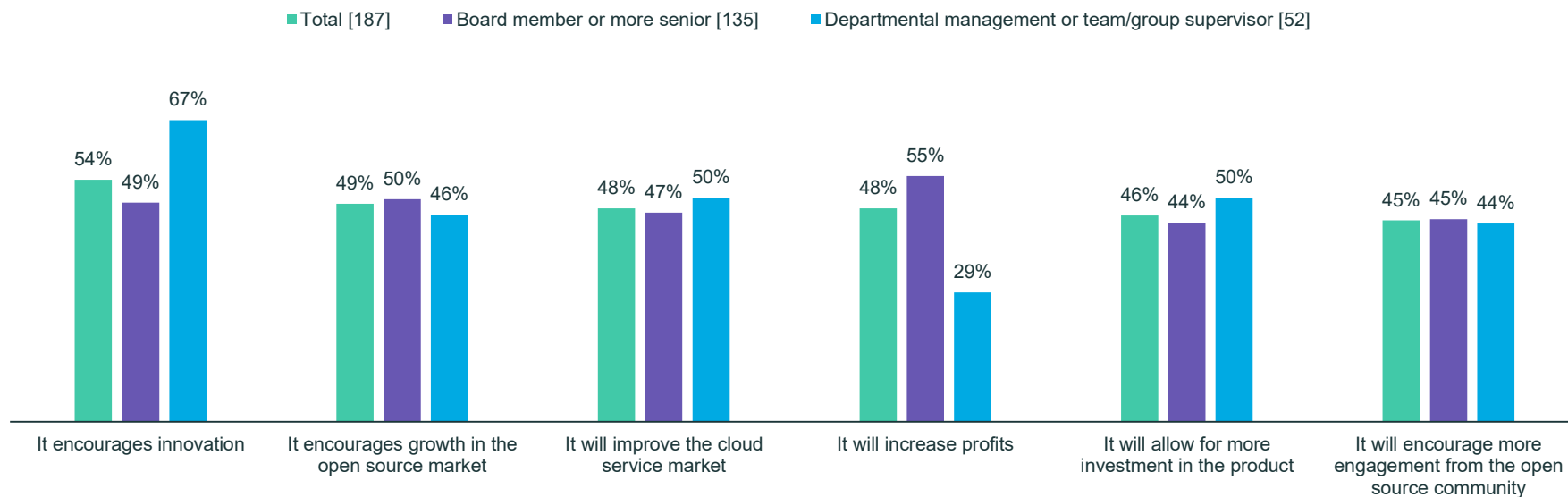
Do you think public cloud companies contribute to innovation in open source technology? [base sizes in chart], omitting some answer options, split by position. “They could be doing more” is a combination of the answers; “Yes, but only by providing a market for open source technology”, “No, they aren’t contributing enough”, “No, they aren’t contributing at all” and “No, they are actively harming open source technology”

Feelings towards source available licenses split by position



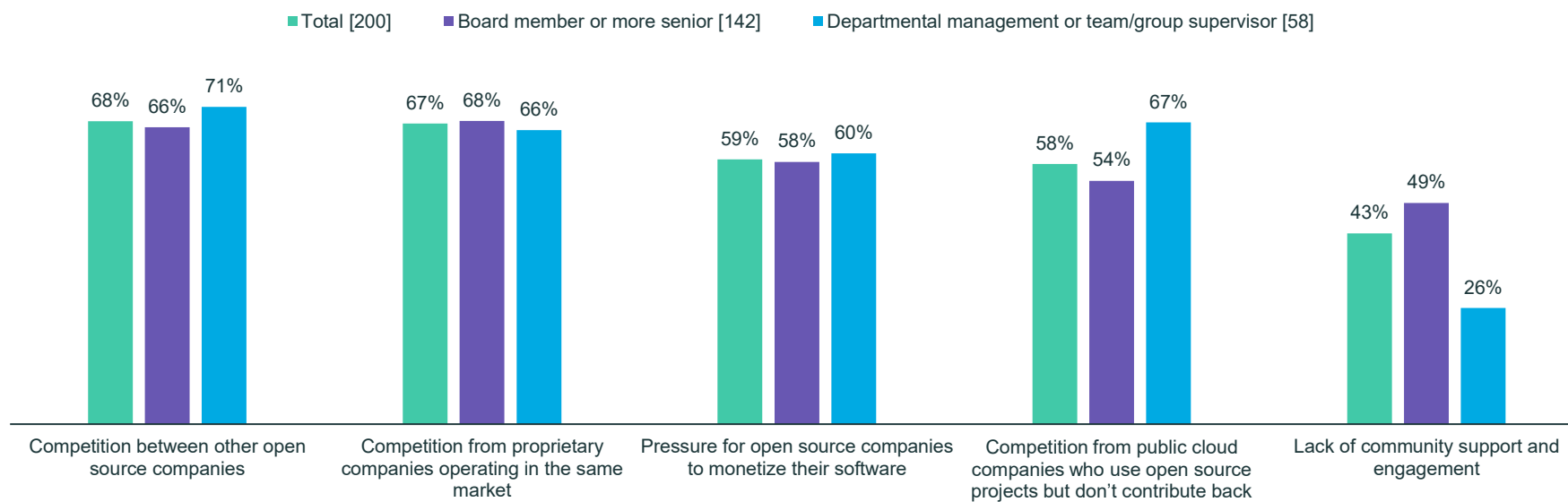
How do you feel about open source companies switching to source available licenses to deter cloud service providers from offering their software as a service for free (for example Elastic's move to an SSPL license)? [base sizes in chart], split by position

Benefits of open source companies switching to source available licenses split by position



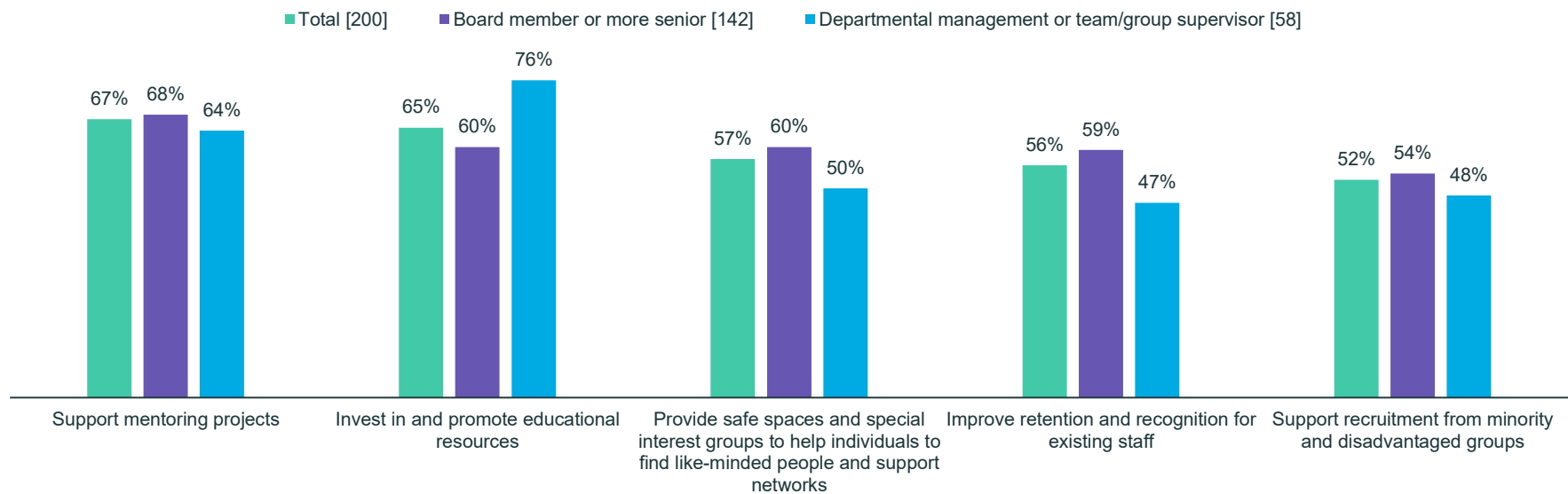
What are the benefits for the open source community if open source companies switch to source available licenses (such as BSL and SSPL)? [base sizes in chart], respondents that think organizations introducing source available licenses is positive or neutral, omitting some answer options, split by position

Challenges to open source companies split by position



What are the biggest challenges open source companies are currently facing? Combination of responses ranked first, second and third [base sizes in chart], omitting some answer options, split by position

Methods of encouraging diversity split by position



How should the open source community support and encourage diversity? Combination of responses ranked first, second and third [base sizes in chart], omitting some answer options, split by position

Thank you

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