



# Ecosystem, Branding & Investment

Michael Meeks <[michael.meeks@collabora.com](mailto:michael.meeks@collabora.com)>

**General Manager at Collabora Office**

@michael\_meeks, mmeeks #libreoffice-dev irc.freenode.net



OPENSUSE-LIBREOFFICE CONF'20

*“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:

Branding – 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 / Communalty ..

- 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

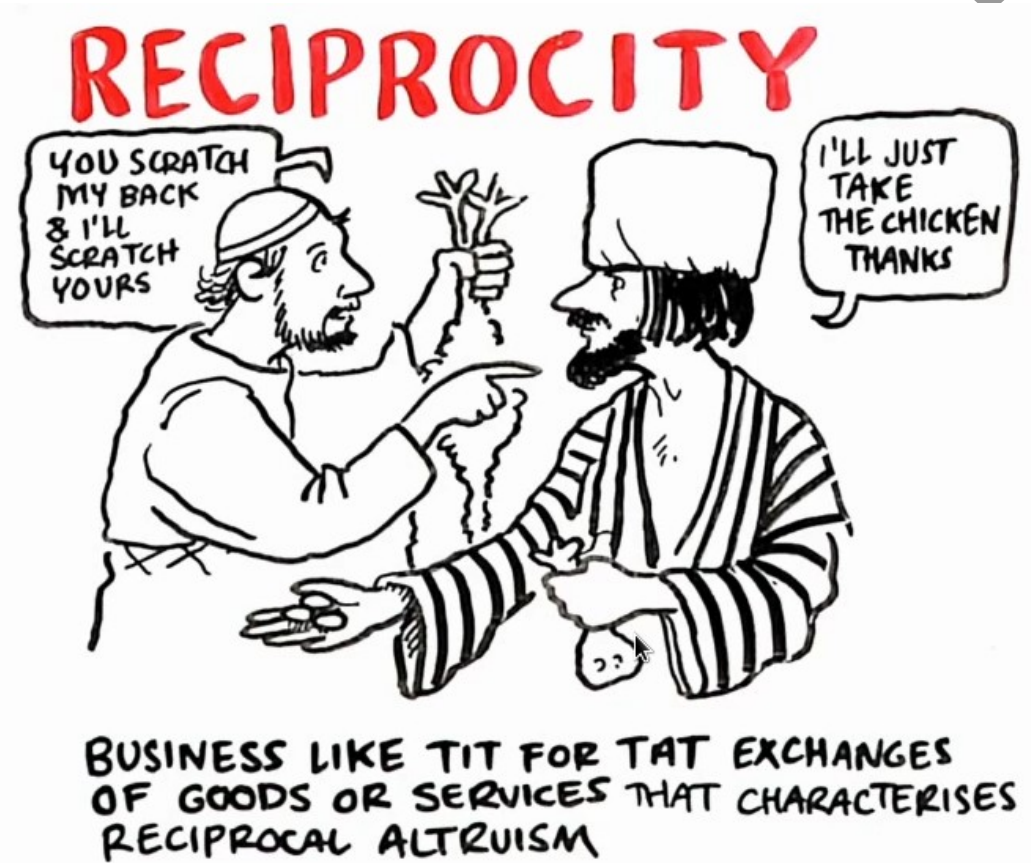
Corporate non-contributors

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](#)

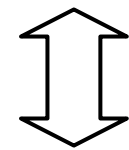
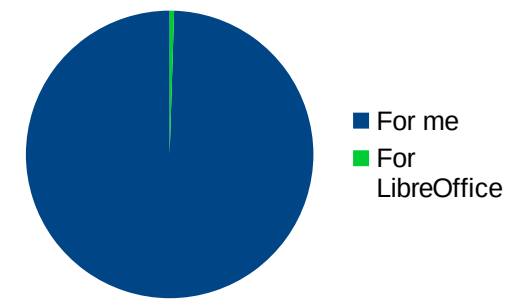
- LibreOffice forms only part of their offer.
- Charging for services & support to contribute back to the code - cuts into the margin of their service
  - So don't contribute back (to the code, i18n, etc.)

## A Remarkably Popular model

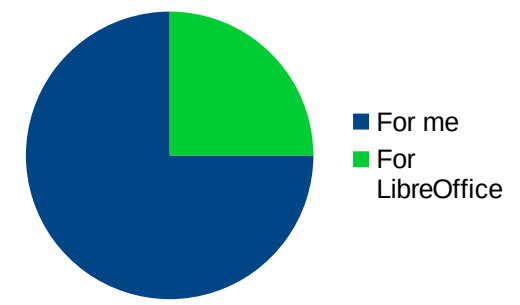
- Free LibreOffice complements:
  - **Often:** Migration & Training.

A 'Tag' - particularly simple way to clarify where that is ok.

Where does the € go ?



You choose.





# Free LibreOffice Complements:

## Free LibreOffice Complements

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

## How does it work ?

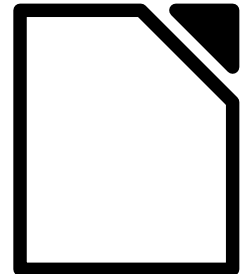
- **File bugs under personal accounts in our tracker**
  - **try to get free support.**
- Checkout the release-notes and/or roadmaps of contributors
  - Promote these as your roadmap to your customers.
- Hope someone else fixes your bugs / issues.

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

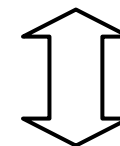
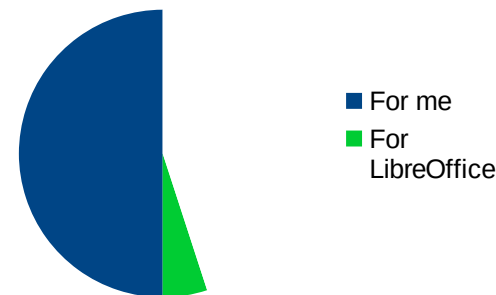
## Competitive Tendering & FOSS

- 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.

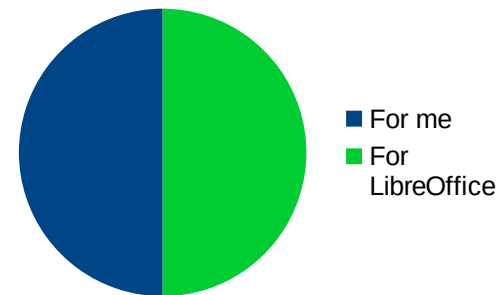
## Prominent examples around the world:

- In extremis gratis replacing paid ...

Where does the € go ?



A cheaper offer !





# Differentiated low-contributors #4

## Take the software & Differentiate

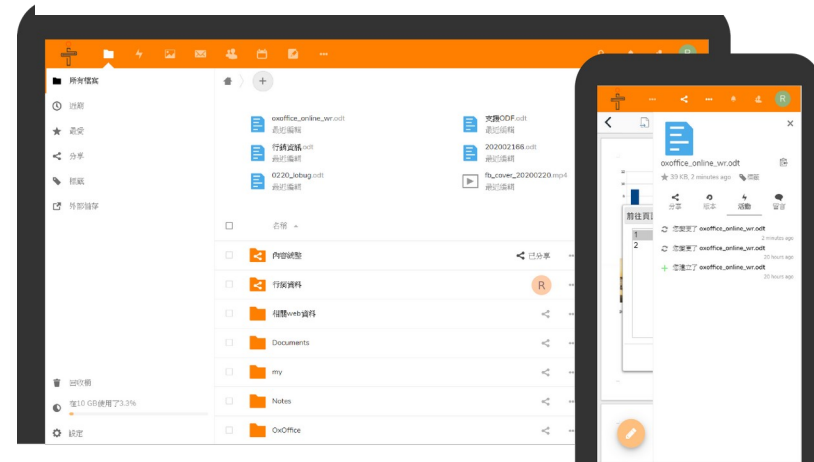
- Host it elsewhere, on an unclear base
- Ask for help / code fixes
- Raise Government funds – “Local Office”
- Publish code, in an ~un-usable form
- Don't engage with the developer community
- Create a semi-proprietary local version

Popular in Asia: RedFlag, OxOffice (OSSII), etc.



## 在地開發

針對亞洲地區使用習慣開發的文件編輯平台。





# TDF – Donation funded

## Generalized Reciprocity ?

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

## 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



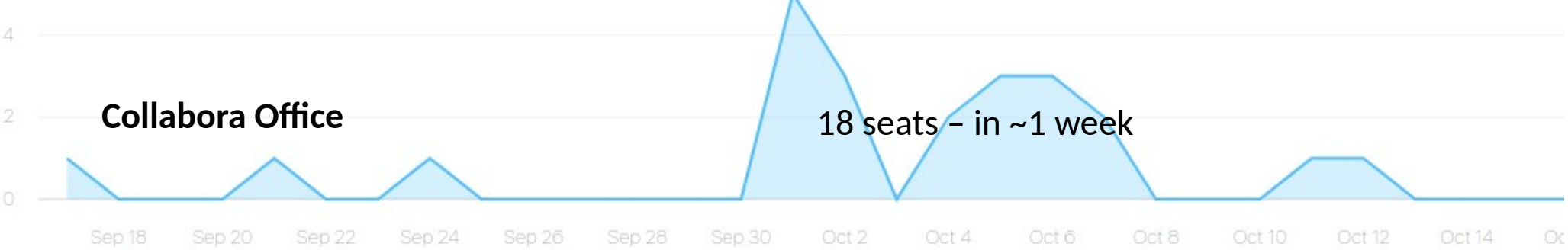
# Why do Brands / Trademarks matter ?

Units per Day

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

Essentially the same software, but different brand.

Area ▾



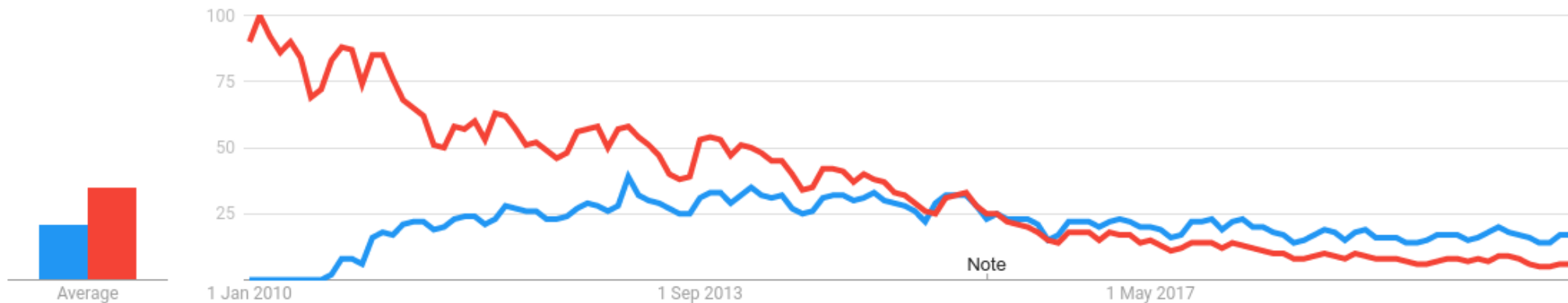


# We know the branding problem well:

**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**







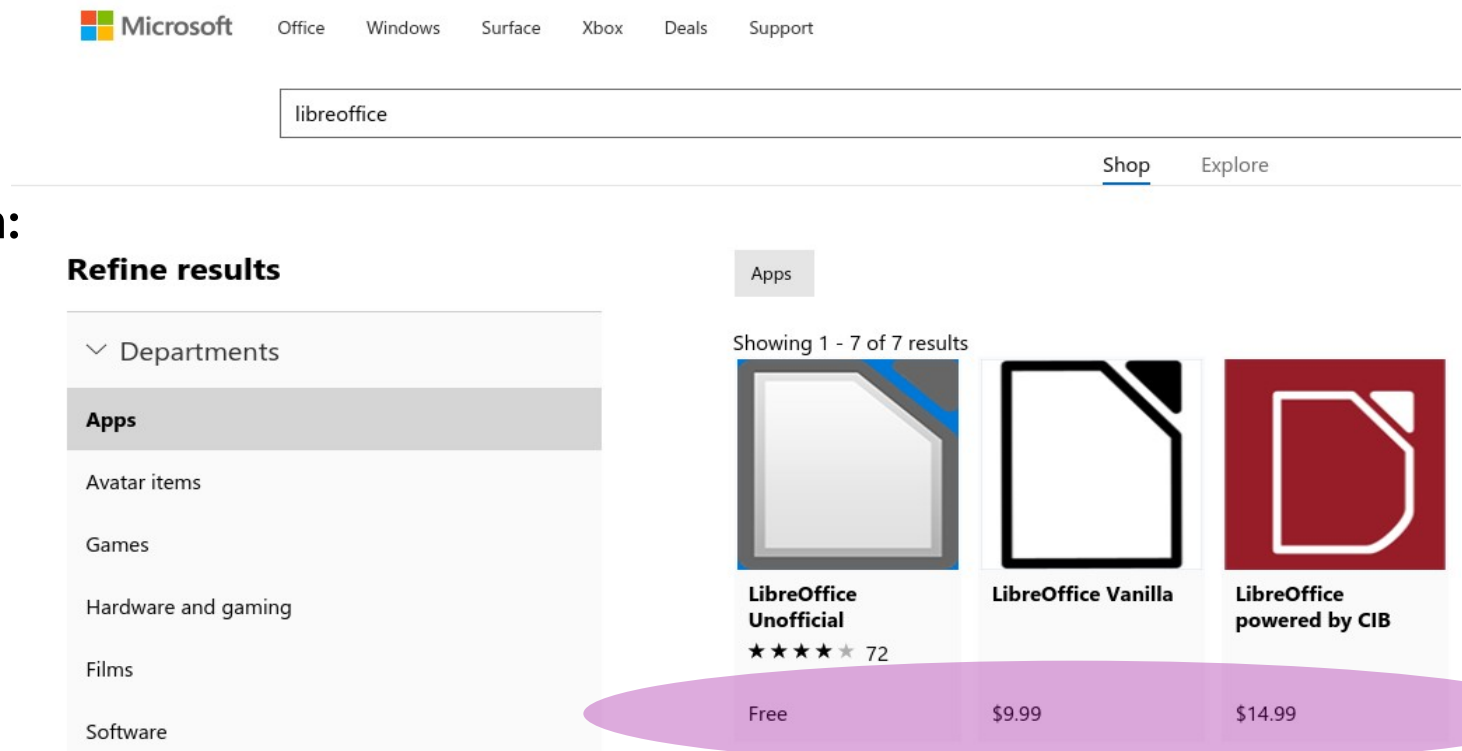
# Brand / Trademark – a peg to explain value

So lets all use the LibreOffice brand for all products ?

Extreme  
commoditization

No differentiation:

Working  
out what  
our brands  
mean.



The screenshot shows the Microsoft Store search results for 'libreoffice'. The search bar contains 'libreoffice'. The results are filtered by 'Apps'. Three products are shown:

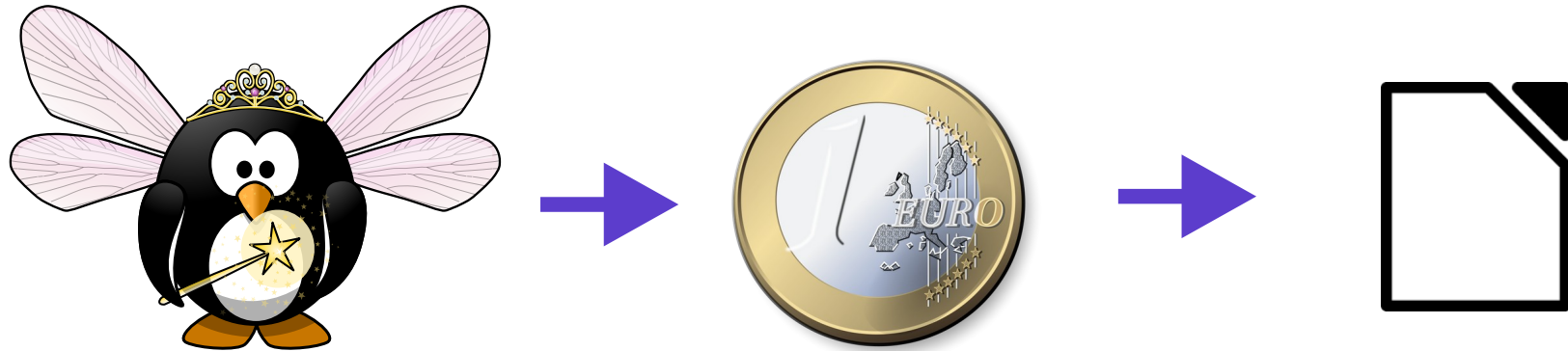
Product Name	Price
LibreOffice Unofficial	Free
LibreOffice Vanilla	\$9.99
LibreOffice powered by CIB	\$14.99

The 'LibreOffice Unofficial' product is highlighted with a purple oval at the bottom of the image.

**Eco-sub-systems ...**



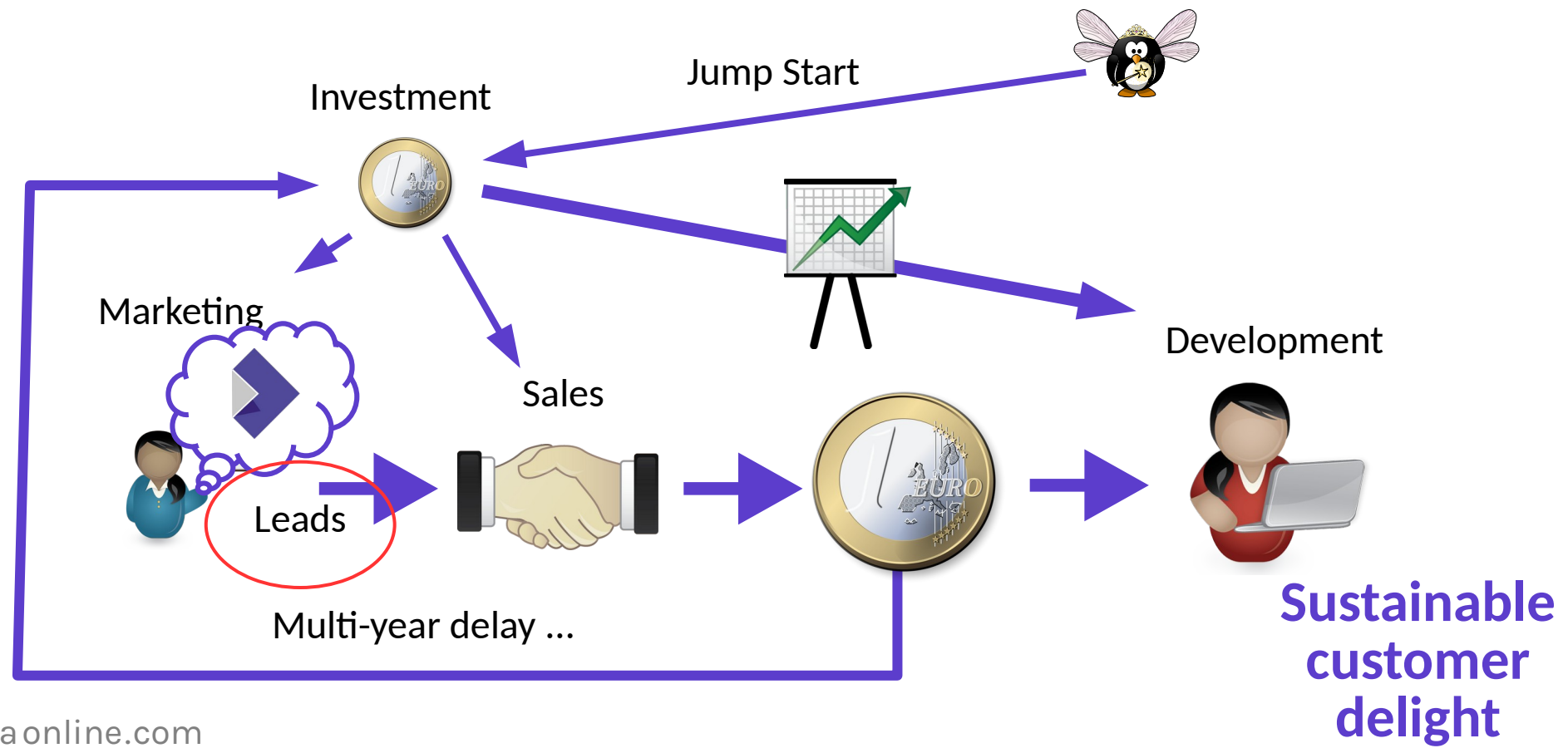
# Yet another economics primer ...



TINMF → There Is No Money Fairy

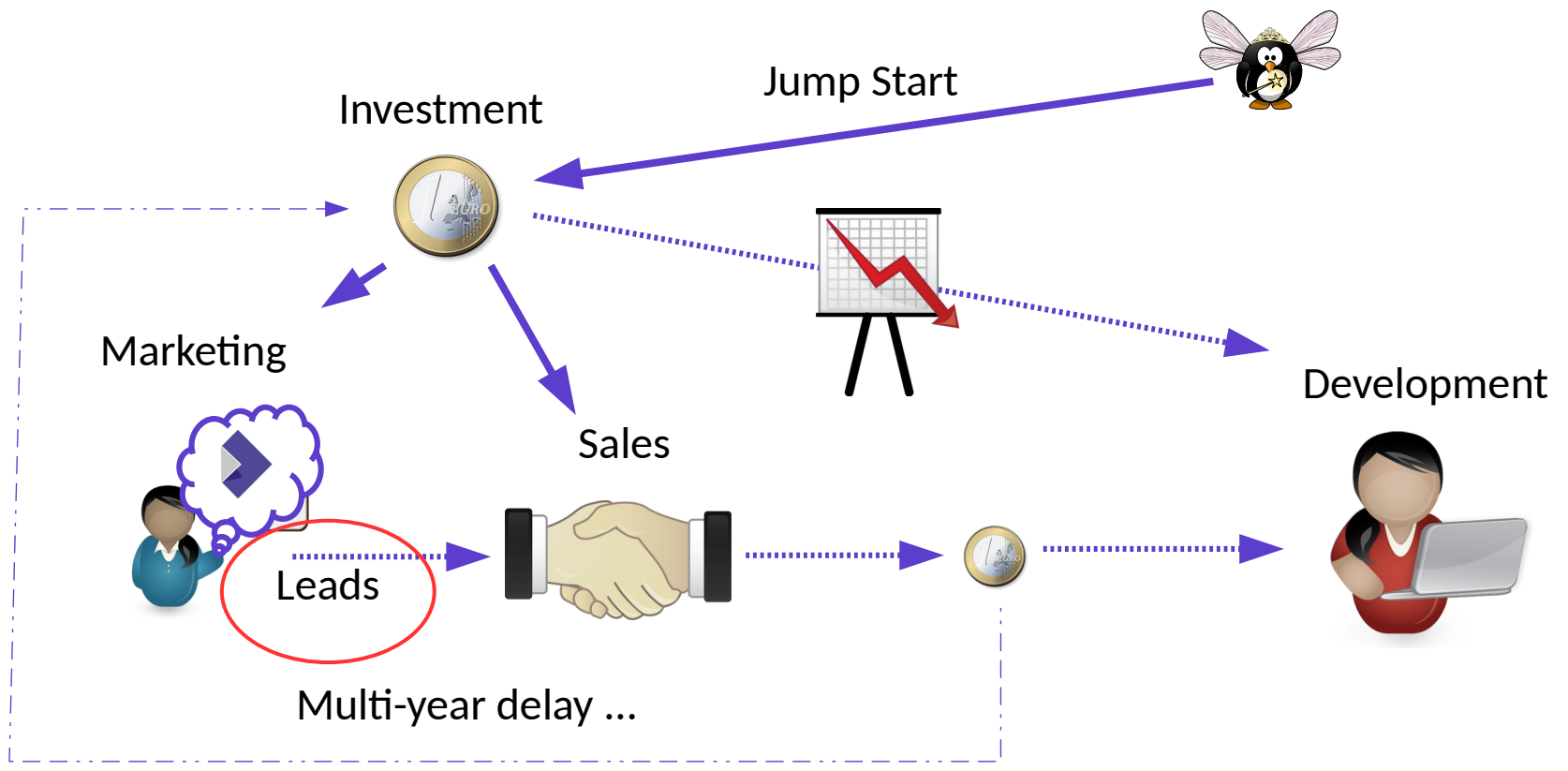


# A virtuous cycle: product company



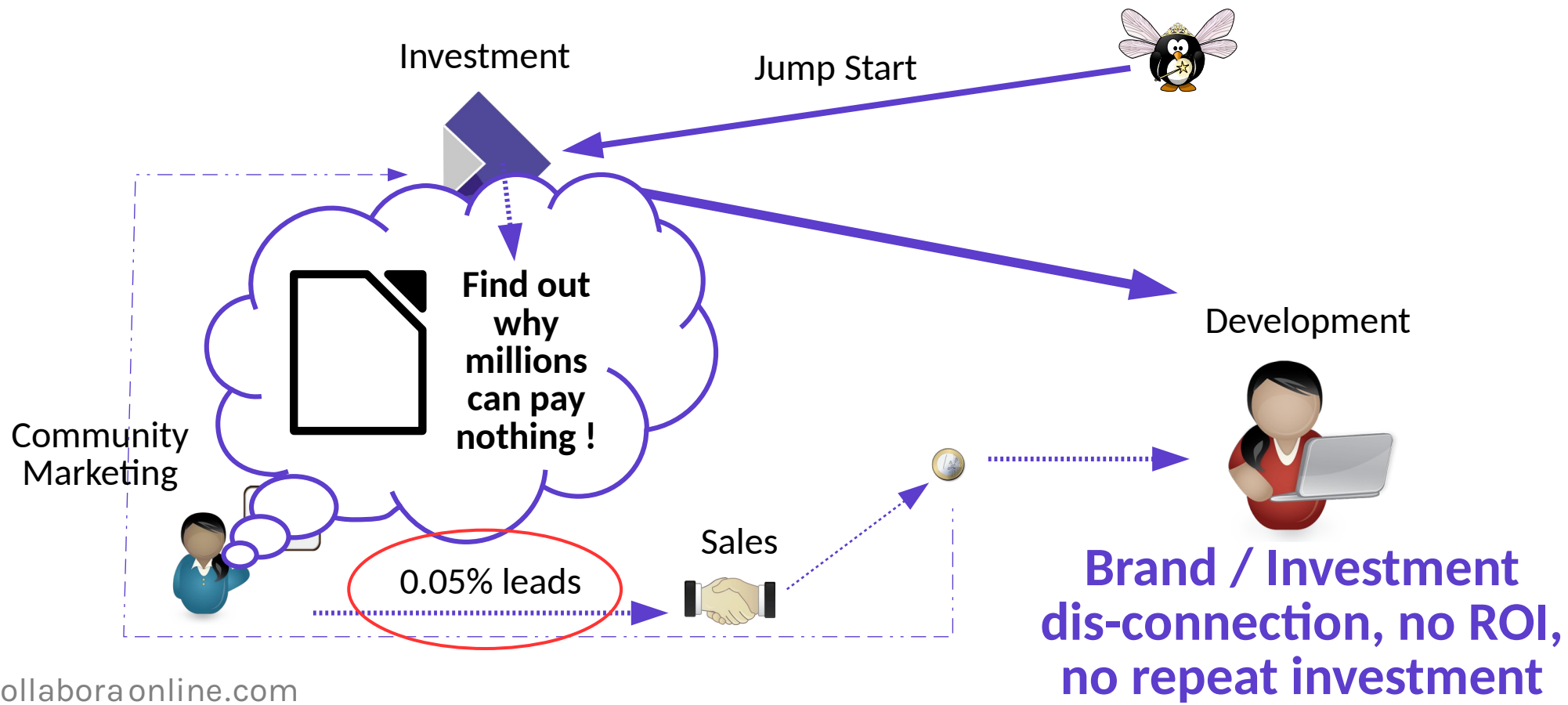


# A vicious cycle: product company





# The LibreOffice “Desktop” cycle:





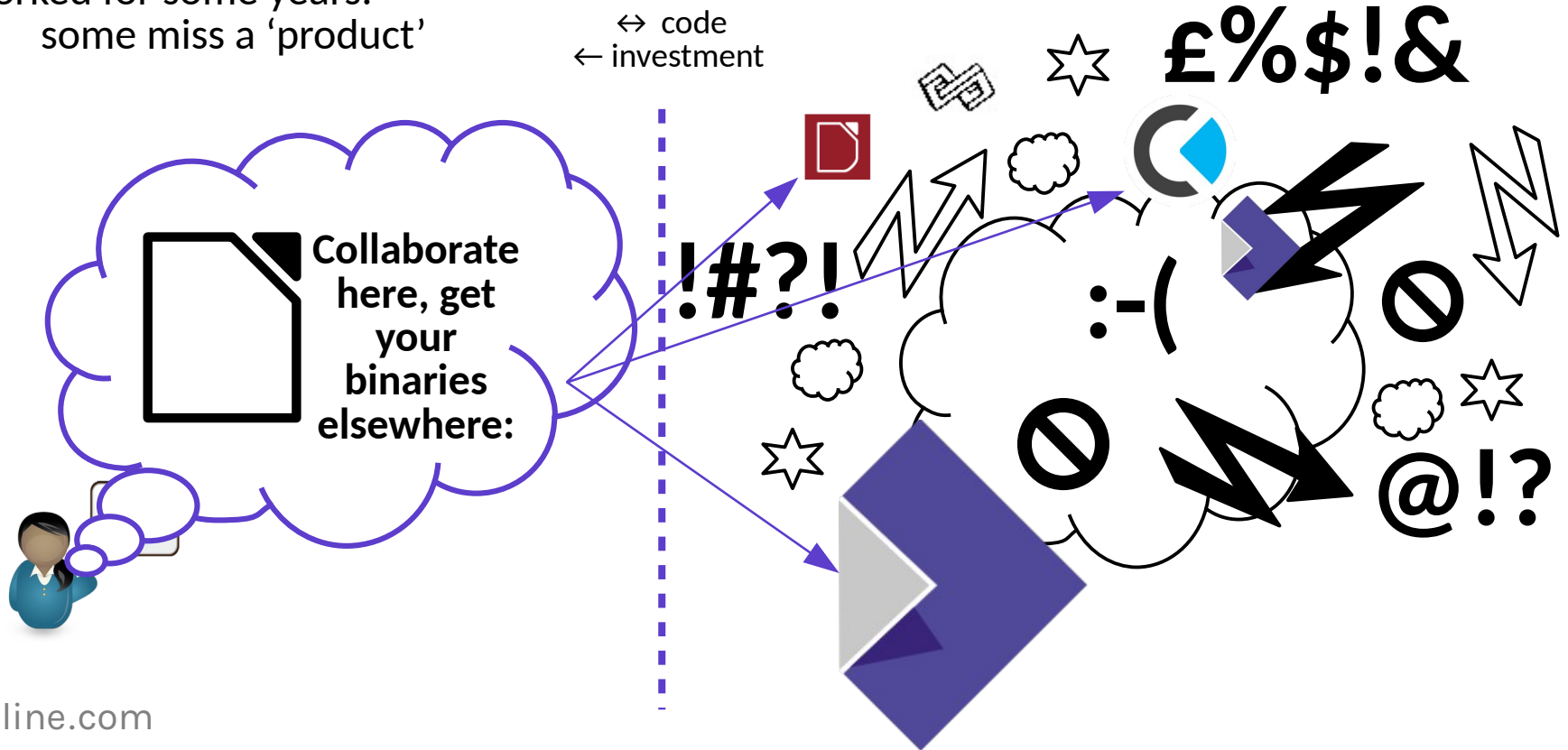


# Source only LibreOffice “Online”

Worked for some years:  
some miss a 'product'

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

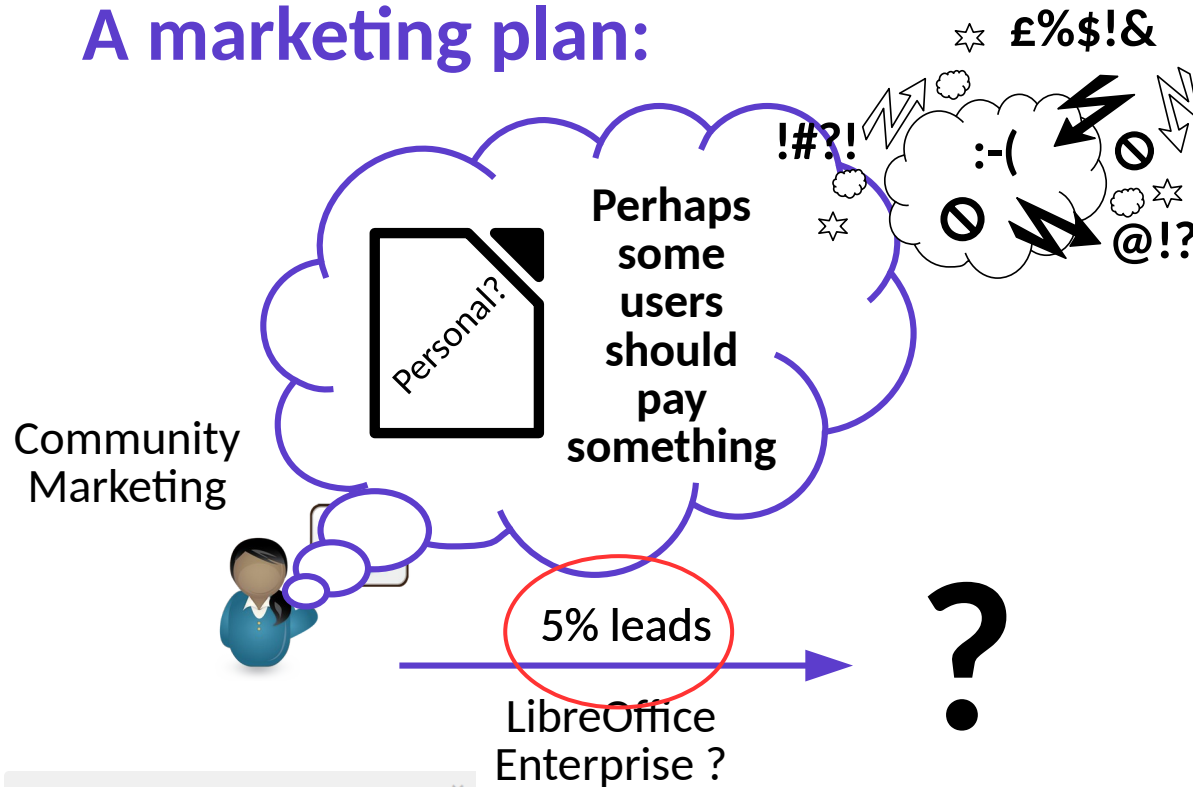
**Great news:**

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

**Problem:**

- Having inclusive community discussion is clearly also good.

# A marketing plan:



## Lots of good ideas

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

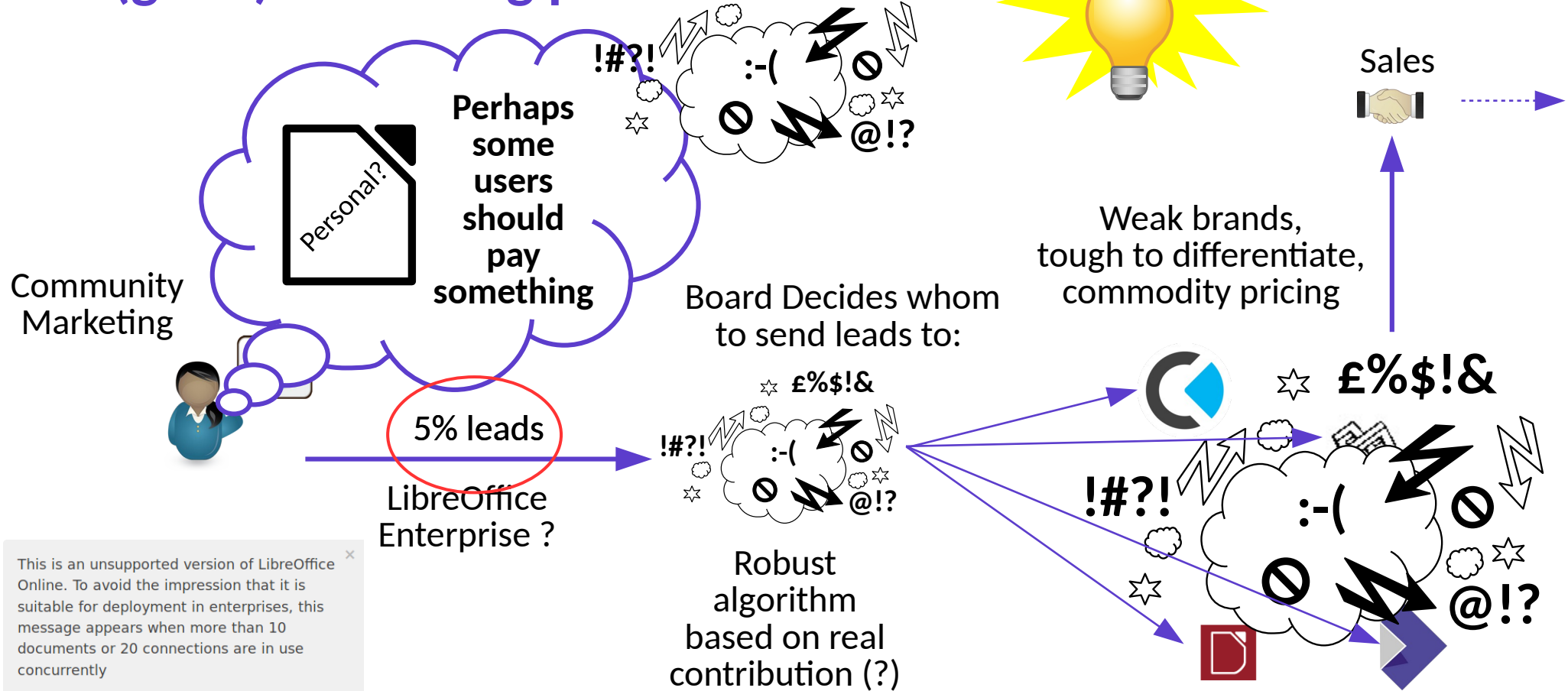
## Even when deployed:

- Where do those leads go ?

This is an unsupported version of LibreOffice Online. To avoid the impression that it is suitable for deployment in enterprises, this message appears when more than 10 documents or 20 connections are in use concurrently

[MORE INFORMATION AND SUPPORT](#)

# A (good) marketing plan:



This is an unsupported version of LibreOffice Online. To avoid the impression that it is suitable for deployment in enterprises, this message appears when more than 10 documents or 20 connections are in use concurrently

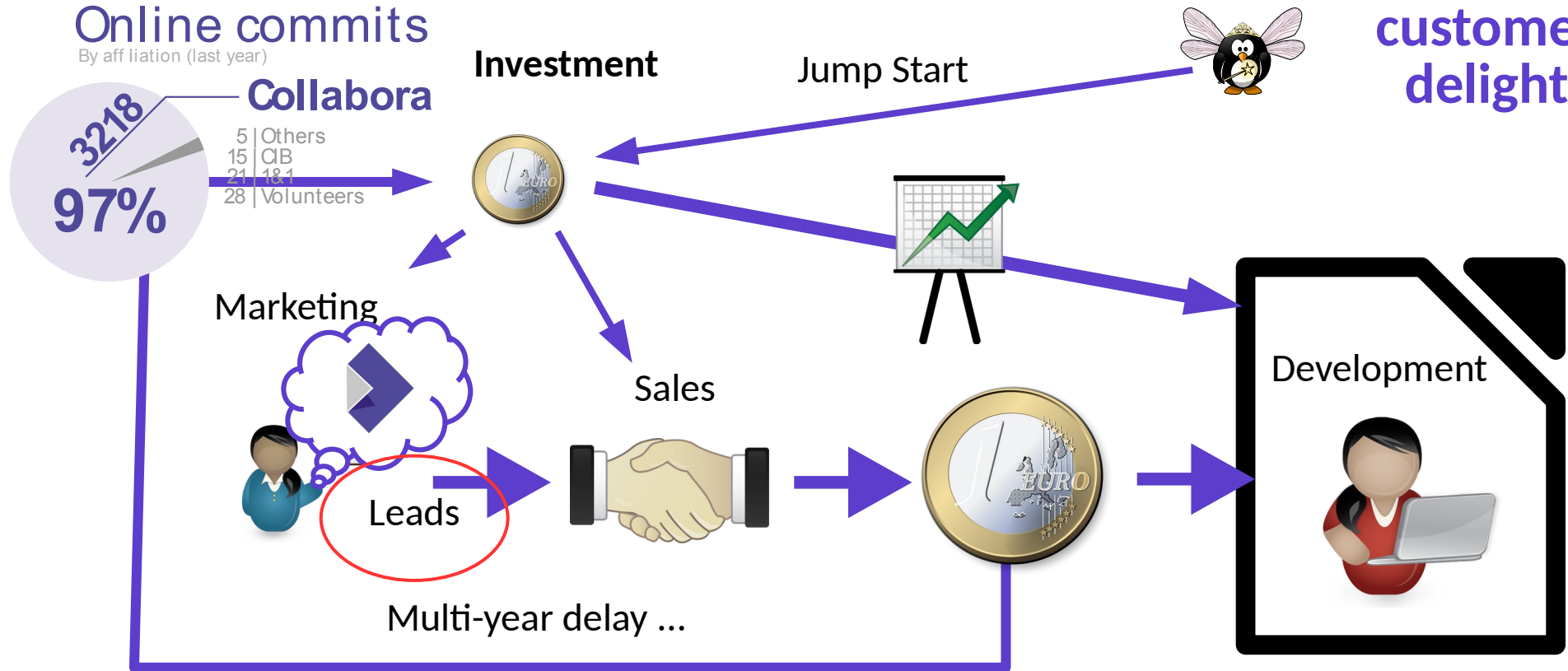
[MORE INFORMATION AND SUPPORT](#)





# Solution: A much simpler cycle:

## Sustainable customer delight





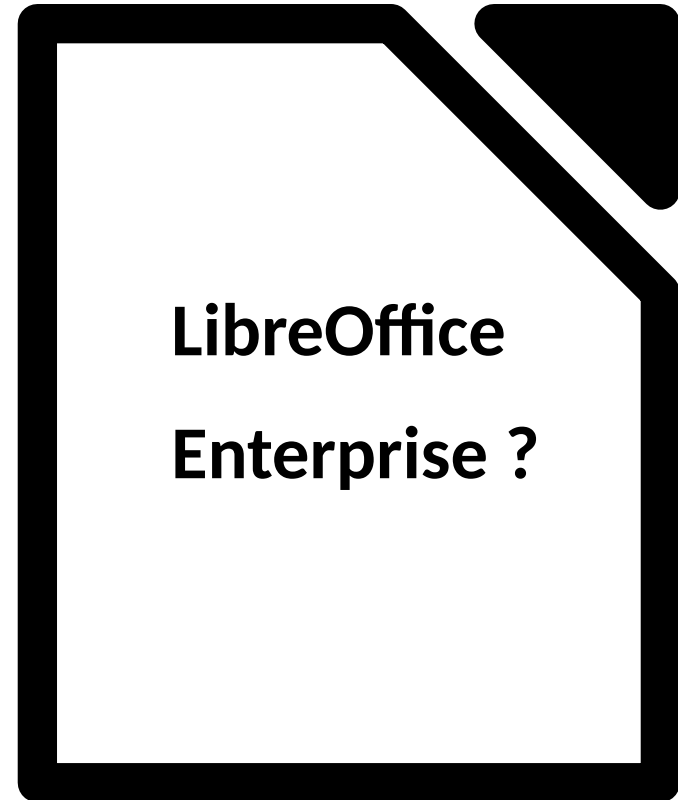
# Solution? → just promote LibreOffice from TDF !

## 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.





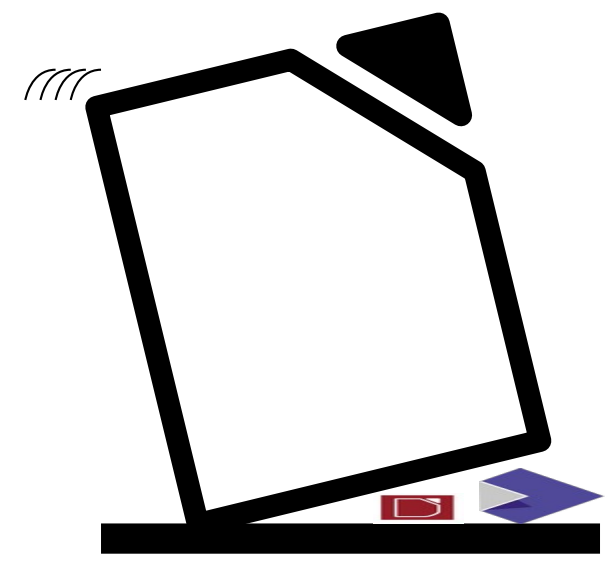
# Solution? → Nationalization by TDF

## Make TDF a commercial / development company

- Hire a large permanent staff
- 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 3<sup>rd</sup> 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 3<sup>rd</sup> party with Product Brand chew up the whole ecosystem ?

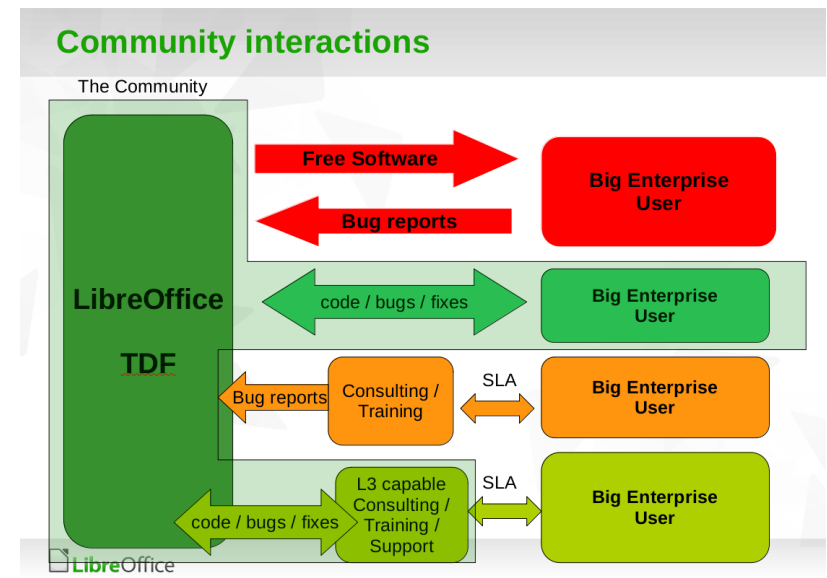
**If this seems new, its not:**



# 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.



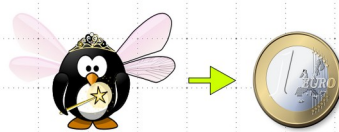
# Not a surprise: keep talking about this ...

2013 → Milano -  
The Governance & Economics of the Ecosystem

2014 → Bern: Keynote: The Money-Fairy

**A startling and crucial realisation**

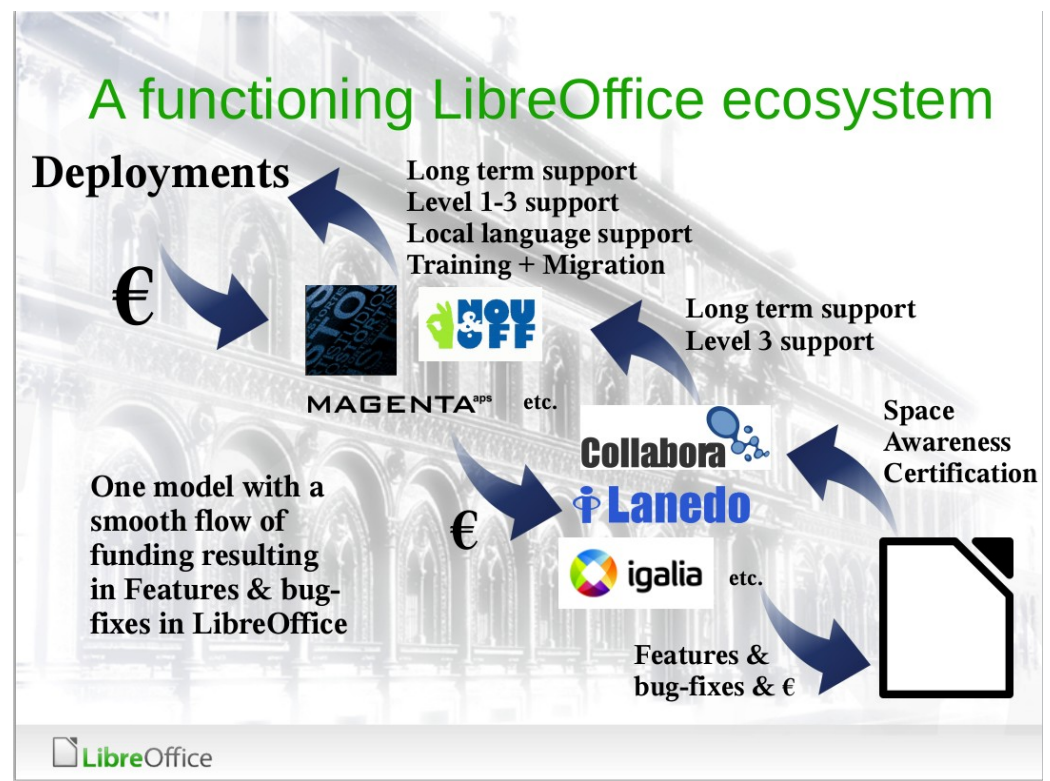
TINME: There Is No Money Fairy (for us)



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**

LibreOffice from COLLABORA



**Some Progress  
& updated stats**



# LibreOffice in business



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:

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



# Improvements in numbers

## More visibility: 280% growth ...

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

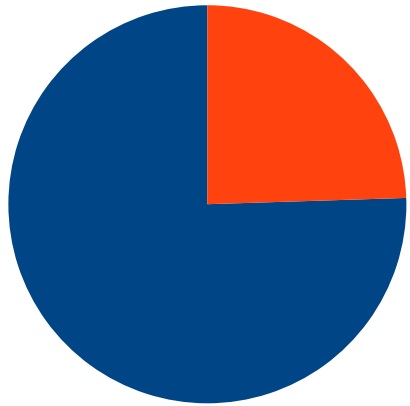
Unique page-views	2018	2019	2020	'Exit'
Download	9,160,000	9,533,000	12,349,000	
libo professional support	12,519	10,299	17,230	77%
tdf certified devs	1,386	1,557	1,756	
libo in business	0	9,748	61,755	21%
<b>Total</b>	<b>13,905</b>	<b>21,604</b>	<b>80,741</b>	
Percentage of total ...	0.15%	0.23%	0.65%	

# Visualizing 0.65%

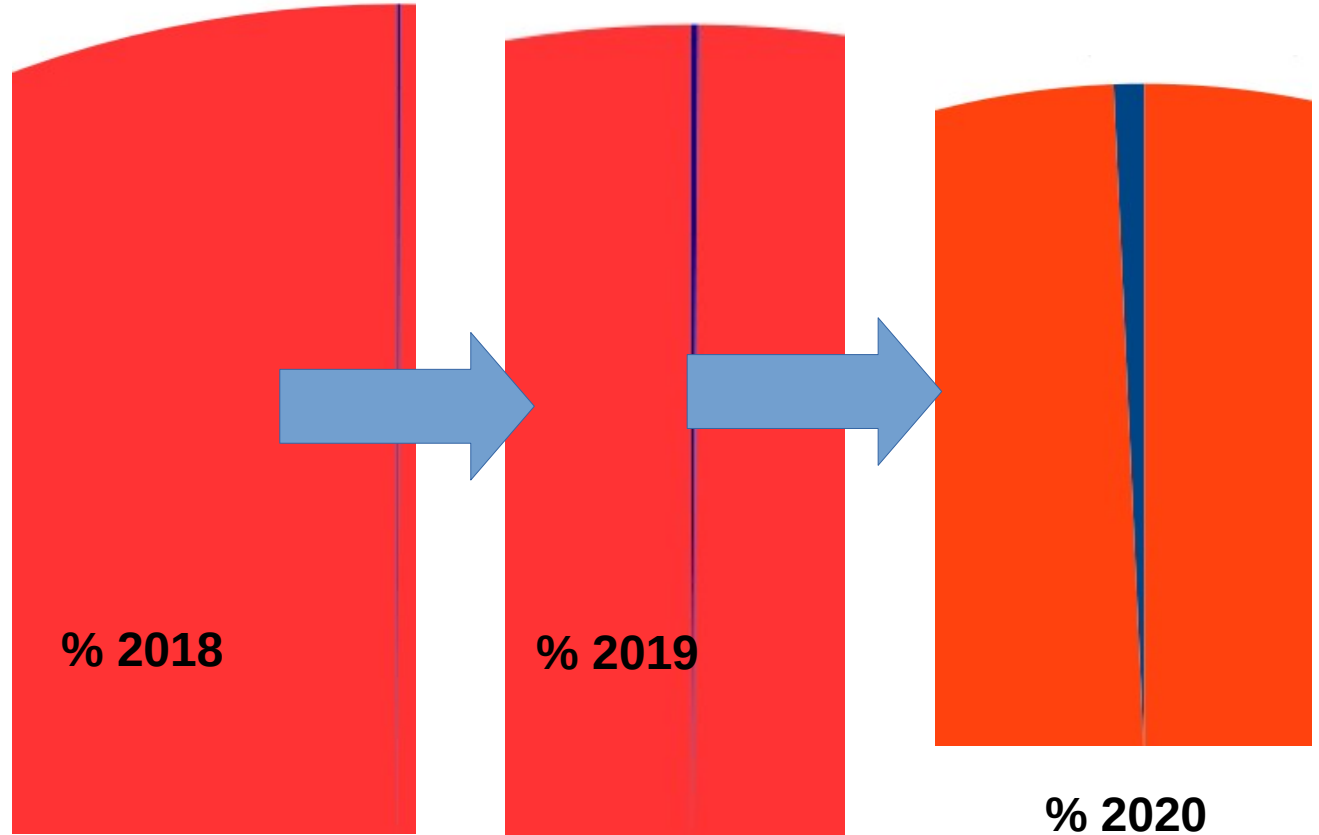


## Web interest to Ecosystem

### Commits



- Companies
- Volunteers



# Good: Improved Framing



LibreOffice  
The Document Foundation

DISCOVER ▾ DOWNLOAD ▾ GET HELP ▾

~~FREE OFFICE SUITE~~

LIBREOFFICE 6:  
IT STANDS OUT FROM THE OFFICE SUITE CROWD.

DOWNLOAD NOW



# Good: Improved Framing



[DISCOVER](#) ▾ [DOWNLOAD](#) ▾ [GET HELP](#) ▾ [IMPROVE IT](#) ▾ [EVENTS](#) [ABOUT US](#) ▾ [DONATE](#)

Search

# OPENOFFICE EVOLUTION

*LIBREOFFICE 7:  
PERFORMANCE, COMPATIBILITY, USABILITY*

**DOWNLOAD NOW**



## 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**

**Need to connect saying “Thank you”  
profoundly into our whole-project  
marketing thinking. Don't wait for the BoD**



# 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*