

Lauren Sell: Great. So I'll just real quickly introduce again. This is Lauren Sell with OpenStack Foundation. We're about to have David Bluestone from Clear Path Communications run through some research that they've been doing over the past couple of months regarding OpenStack, and the OpenStack Foundation brand. So, with that, I will-

Mark Collier: Just to note, we are recording this, if you didn't hear the prompt, just so everyone's aware. So we'll be able to share with people that aren't able to attend.

Lauren Sell: Yeah, thank you. Great, well with that, I will turn this over to David.

David Bluestone: Great. Thank you Lauren. I'm gonna share my screen so everyone can see. Is this the wrong screen? Let's see here. Hold on one second.

Mark Collier: Yeah, I think it looks good.

Lauren Sell: Yeah.

David Bluestone: Can you see my screen?

Lauren Sell: Yes.

David Bluestone: Okay, great. Fantastic. Mark, okay?

Mark Collier: Yes.

David Bluestone: Thank you Lauren. I can kick off and give an overview of what we've done over the last six weeks or so. I have about 25 to present. If people have questions I'll pause and I will certainly, would welcome people to ask, any clarifications or questions about any of these slides. Then I think the plan is to pass it back to Lauren and the OpenStack team for Q&A at the end, so people will have opportunities to weigh in.

David Bluestone: At the onset let me explain a little bit about my firm Clear Path and the research we've done. Again my name is David Bluestone, I am a principal founder of Clear Path. We have been doing research in the tech states, open source state, for five years now with a number of different clients. From NCF, Cloud Foundry, as well as some of the larger companies, tech platforms. We have a lot of experience working with foundations, and open source foundations specifically on market trends, tech trends, and generally what the purpose is of foundations are to our decision makers, audience, IT decision maker audience. With that, I will go to the second slide, which is just letting you know what exactly I'm basing this presentation on, which is both quantitative and qualitative. In nature we did four focus groups, started off doing four focus groups, two in Seattle and two in Beijing. Our focus groups consisted of ops, dev ops, fifth avenues and architects. All four roles were represented in these four focus groups.

David Bluestone: We also conducted four in depth interviews with open source influencers, representatives from Bijing [inaudible 00:03:03], Google, Microsoft, and Tenson [inaudible 00:03:05]. Based on the qualitative

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research, based on what we were seeing and hearing with that open-ended listening, we prepared a survey to, as Lauren said, test OpenStack's technology and foundation's grant positioning. As well as where OpenStack and OpenSource sits in the market.

David Bluestone: That survey was conducted from the end of August to the beginning of September. Just over, one respondent over five hundred, we got an extra straggler in there. But with an N=500 sample, this is a global survey across ten countries. I've listed them here in five languages. We weighted them to be evenly distributed across those three regions; North America, Asia, and Europe. And we consisted of roles including Ops and Architects, Dev Ops, [inaudible 00:03:56]Accu Managers, GITO's, NCIO's TTO and [inaudible 00:03:59]. You can see the percentages there and the breakdown. The goal, stepping back, the goal is we're trying to keep up, we're trying to broaden scope, and broaden scale, so we have a real pulse of the market.

David Bluestone: I'll go through a couple regional differences as I go through the slides. But it's very important to not just be focused on the U.S. or focus on a specific country, or a specific type of role. We're trying to get broad IT decision-maker opinion. So if there are no questions I will continue.

David Bluestone: So let me get straight into our key finding. We identified three big buckets based on the research for OpenStack specifically, but also more broadly about the market. First, OpenStack itself has a reputation it is quite powerful. It is known as being a very powerful tool, very flexible, customizable. And also quite frankly, it'd be difficult to master, the complex technology.

David Bluestone: When compared to other players in the market, OpenStack's brand [inaudible 00:05:07] it compares favorably to all the other companies that we tested with a strong majority, 64%, giving a favorable rating. The more people know about OpenStack the more they like it. We tested awareness and then we cut that capability question by awareness. You can see as people are more familiar with OpenStack the more they like it. That is a sign of strong brand health, because it means the more they know about you, the stronger your value is to these respondents.

David Bluestone: Second, that's just a level set. We wanted to see where we stand with the market. Second, what does the foundation mean to people? Both in terms of general what is an ideal foundation mean but also OpenStack specifically. And we found this is something interesting. We went into this research not knowing exactly what the respondents would say. What do they think about foundations? What do they think of role of foundations are? And here the data was unambiguous in that respondents look to foundations to curate projects. It's not to house all the projects, not to be overly prescriptive. But it's to provide a curated path to help them navigate, in this case open source infrastructure, but it's to navigate the technology.

David Bluestone: The projects themselves are what's more important than the activity of the foundation. Anything the foundation does to promote and improve

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the experience of the actual projects is what folks are looking for. They don't necessarily think first about the foundation, it's all about are the foundations helping support the project that I care about, and that I'm using to do my job.

David Bluestone: The other point here is we tested the comparable infrastructure. This is something obviously that has been discussed in the context of the summit, could discuss in the context of some of the project work and the new projects coming under the OpenStack foundation umbrella. Open infrastructure in and of itself is a very compelling idea. We know this especially in the focus groups, but it's very uncertain of what it is. You have to define it in order for it to have real meaning, because otherwise people kind of pull what they think. They commonly associate open infrastructure with open source infrastructure, open source technology infrastructure. But it needs to be explicit. It needs to be weeded out ahead of this to define it otherwise people can get confused.

David Bluestone: That being said, once it's discussed, once it's defined for them, it is a very compelling idea. We see and we've tested the idea of essentially changing the OpenStack Summit name to be the open infrastructure summit. I will show you the data but it came back very positive in terms of that brought in more people.

David Bluestone: Lastly we focused on open source as a trend in a patterned market. And it is just very clear that open source is the spine and it is the foundation message, not the, [inaudible 00:08:15] works, the foundation of the foundation. No. It's the backbone of why people are looking to foundations like OpenStack, because it is the thing that unlocks their opportunity. As users and as companies. And so the more OpenStack foundation can articulate its vision for the future of open source, the more we're aligning, the more we are very common trope in public opinion is meet people where they are. The more we meet people where they are we're kind of down opensource. [inaudible 00:08:44]

David Bluestone: So in the broad strokes, I will go into the data that underpins these big findings and then I'll wrap up with some observations.

David Bluestone: First let's talk about the grant. I mentioned this before. It's not that the foundation grant isn't relevant, it's just that the respondents here, when we ask about awareness, they're just not as focused on the foundation as they are the technology. As you can see on the left side, we ask this familiarity/awareness question, and OpenStack technology is slightly ahead, beyond the margin of error. I should have mentioned the margin errors as more or less 4%. You can't technically calculate it because the [inaudible 00:09:34] study you don't know the [inaudible 00:09:36] universe by pdm's. But if you were to apply the same margin of error calculation that you were for any survey, you'd get about 4%.

David Bluestone: And you can see here you add very and somewhat together OpenStack technology, 59% say they're very or somewhat familiar with it, where the OpenStack foundation is more like 52%. That's beyond the margin of

error, that suggests, and also that's pretty good. I'm talking about majorities here.

David Bluestone: When you ask in the in-depth interviews the first quote in yellow, or the focus group quote, what do they say when we're talking about OpenStack, the bottom quote how you have control, it's safer, you can customize everything, less constrained, less limitations. But to very top, that goes to my first point on the key findings slide, which is OpenStack has a strong, powerful brand, but it is also known as something [inaudible 00:10:30]

David Bluestone: The top quote you all can read, but I'll reiterate here, OpenStack was the beginning of the evolution towards corporate contributions to open source, my explanation. That was the first time I saw large companies publicly dedicating large amounts of dough for foundation projects.. So it's known these are what people think of when we're talking about OpenStack. I think again some of the things we heard about how you, what the requirements are to use it, to unlock the power. The premise of OpenStack is you have to raise or keep a technical team to keep development going, or you better know your stuff. This is common.

David Bluestone: I think that's a good place, because people know who or what OpenStack is they know more or less that there's a foundation around it and it has very clear, positive, and also that difficult to use part of experience.

David Bluestone: If you go to the next slide, or if I go to the next slide. Sorry. We do some favorability ratings. This is very common, the way that we ask it here where you ask about intensity very favorable, then we have the top number is overall favorability. The bottom number just because a lot of these companies don't engender strong negative opinions, we grouped together unfavorable and neutral and never heard. Everybody's not just a positive opinion. So that's why I have it the pattern color there, because most of these are driven by neutral or never heard. But still, what I think you can take away from this slide is that OpenStack right there, 67% favorable overall. 33% Very favorable. And that's in line with the other main players here. Google platform is slightly ahead of everyone, amongst folks we talked to, than Assure, OpenStack, Red Hat, AWS and then Max Space. All within the margin of error.

David Bluestone: We also [inaudible 00:12:29] some other companies not represented on here [inaudible 00:12:33], [inaudible 00:12:33], Ten Cent, they have higher neutrals, which push down their overall favorability. But in general I think our main point here is that OpenStack certainly has positive favorability [inaudible 00:12:47].

David Bluestone: The other companies [inaudible 00:12:51].

David Bluestone: What I think is even more interesting is when you look at this, like I said at the outset, by favorability you cut this by very and somewhat favorable versus just really not favorable and you see almost a 20% swing. So again I've said this now several times. The more people know about OpenStack the more they like it. That 91% is quite strong.

- David Bluestone: We also broke this down by region and you can see that OpenStack has particularly a strong favorability rating in Asia. That's driven by China, which has 82% favorable. And then U.S. is also disproportionately favorable relative to North America but also relative to the overall population at 69%.
- David Bluestone: We also broke this down by ITDM role. We have CIO/CTO's actually have a higher favorability than overall with 75%. The other roles are on average. The IT [inaudible 00:13:49] 68% slightly above, and then Dev Ops, Devs and Ops, all came in at [inaudible 00:13:52]% which is slightly below.
- David Bluestone: Then lastly we did do by company type as well, and you see enterprise liked OpenStack more than non-enterprise. 71% generally liked. [inaudible 00:14:02]
- David Bluestone: Some of these cuts we offer just to show you, it's below the top line number there are some differences and that's why it's important to get a broad scope of this research. Seem to me that the big takeaway from this slide is OpenStack is disproportionately seen favorably in Asia and amongst people who know it. So the more OpenStack can do to get it's name out there and to get the energy up the more positive feedback benefits, positive feedback would be received from that. And then obviously Asia is a very important market and a market that's very perceptive.
- David Bluestone: Going to the next slide, we did ask some term statements. What do you like, how compelling is it to use OpenStack. In political terms the proof points, the biographical statement, and you want to see what pops. Here, this is not all of the statements. These are the top statements we asked others. And I want to point out first a lot within the margin of error there. That's why we had to include so many the top proof point. But what bubbles up it's about the community, the numbers, that's the first one. We also have intensity here, we give this on a scale of 0-5, so the five is the dark red and the fours are represented by light red, and our last number is the total of both. I've even seeing some intensity around the partner, the members, that's a good third-party credibility point. Those two are also in your top.
- David Bluestone: The less compelling statement, just as a point comparison to what didn't make this top list. It was about how the foundation started, it was using the narrow case study that we asked a couple of the members and how they were using OpenStack. Those messages didn't go as well, they were actually 50 or below in terms of overall compelling reason to use OpenStack. From the data, from the policy and everything look like it's not as relevant when you get it more narrow around these specifications and when you talk more about the foundation and the actual technology.
- David Bluestone: But when you're talking about the community, when you're talking about the people backing it. Which I think is another way to talk about the community. And the actual value of the speed and flexibility and lower cost. Those are the ones that bubble up, those are the statements that

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matter. If the previous slide said the more people know about OpenStack the more they like OpenStack, then these would want to be the things you'd want to convey to help people know more.

David Bluestone: Moving to the next section. What is the role, so we talked a lot about OpenStack as a tool and brand how it's evolved OpenStack as technology, but what about the foundation itself? And what's the expectations around foundations for open source? Just generally and then OpenStack specifically. Here, first, again are foundations a good thing or a bad thing? And overwhelmingly people say that open source projects benefit being adopted by a foundation. 70%. That is, any time you get a big spread like that, it's just a no-brainer. Only 4% say that they strongly believe that open source innovations are hurt by being adopted by a foundation, so you're really talking about foundations being a good thing for open source.

David Bluestone: On the right side, I think the statement here, this is a forced choice, so we basically forced our participants to say one or the other, and then we offer them they can volunteer don't know, they can volunteer both, but you can see most people tend to get put into these buckets as a forced choice in our methodology. And you can see here almost 60/40 state that the best model for an open source foundation is one that selectively works on projects that makes it easier to use. Right? So this idea of curation. I want to emphasize that because I think we went into this research without knowing the answer. The other option was it's one that brings in a large number of projects knowing some will succeed, some won't. And it just continues to score all the projects.

David Bluestone: There are open source foundations that fit the bill for either one and we had genuinely no sense of, we had prophecies of this would be a dividing line, but the fact that it's almost 60/40 in favor of being more selective, being more of a curating entity that curates how these projects work and how to make them better. I think that's a big finding. I want to get some comments around this quote, but this influencer said, "I don't think we want just a single foundation, we want foundations to be focused on the right things." So it's not about just one foundation to rule them all that owns all the projects and some work and some don't. It's about just a more purposeful, it's about a more selective and a more proactive foundation that focuses on the things that they do and then making sure they support all the projects.

David Bluestone: And quite frankly I do think that's interesting because it wasn't a fore drawn conclusion. Again we asked this not only in the quantitative but also in the qualitative. Three out of our four influencer also said that that second model of curation was their preference. Which was the metric we want to unlock. We want to be the type of, we would recommend, open source foundation tries to be the foundation that resonates in terms of what people are looking for the ideal foundations. That is [inaudible 00:19:26] come through.

David Bluestone: Going to the next slide, we also ask about the ideal characteristics, and I apologize my PDF I think got a little wonky in formatting on the right side. But you can see here there's a very broad sense of, types of

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primary role of a good open source foundation. I think it's muddled. Again this gets to the idea that any foundation needs to be very clear and articulate it's vision very clearly because what's expected of them is a little muddled. It's a little fuzzy. Any time you see basically from 14-10, that's all within the margin of error. People want open source foundations to set standards. That's the number one. And then it's just muddled in terms of how do they do that. So again just being very deliberate, and setting the course and setting a vision and that's how they see folks on this phone call on this conference call are part of that, setting that road map. But that is what is necessary to cut through. Otherwise it could [inaudible 00:20:25].

David Bluestone: Moving to the left side, we also asked these questions qualitatively. In [inaudible 00:20:31] you're able to kind of ask the why. In surveys you only have one shot. You ask a question and if you get muddled responses you're finding is like people don't quite know. But for qualitative you can say but why, or you ask a follow up. And so we did ask that follow up. So what exactly are these ideas and characteristics and then people kind of listed a bunch, because what if you are too focused on a particular one. And four came out that we saw consistently across both focus groups and the IVI. The first would be narrow the choices, to lend credibility about which projects matter.

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David Bluestone: ... Good choices to lend credibility about which projects matter. Again, this is the 'why' for curation or this is putting some granularity behind this idea of duration. What does that mean? It means narrowing. Right now, this space is overwhelming in terms of how much is coming at people. Being able to narrow the choices and then put your stamp of credibility on the project that matters.

David Bluestone: Make your project portfolio cohesive. Again, align behind one vision. That people are looking for someone to make order and logic out of a lot of change. This creating of standards came through both in the qualitative and quantitative. You can see that there as number three. Then, provide the support and the visibility to help the projects that matter to us. I'll stop there. I heard some ... Maybe someone just got off mute, but is there a question? Yeah.

Speaker 1: I have a question about methodology here.

David Bluestone: Yes.

Speaker 1: You asked all of these one, two, three, four, five, six, seven, eight, nine questions, you let the person select the one. Is that correct?

David Bluestone: Yes. Quick math obviously shows you that we didn't get ... That doesn't equal 100 because you select one, but then we also have people say they don't know and I didn't include that number, but there's obviously lots of people that that is partly why I did this model because you have

a lot of people reporting they don't know what the primary role would be. Yes, this is a select one. We offer these options and we force them to choose a single option.

Speaker 1: They know where they're at.

David Bluestone: Potentially, this would have been different if we could select all. We were actually forcing them to choose because we wanted to get them more ... We wanted them to select their preference and I think a 'select all' would have maybe created more muddle sense to things. Yes, that was the way that we set up the questions.

Speaker 2: Great thanks. It looks all over the place. I guess people ...

David Bluestone: Yeah. We tried to set it up by doing the correct one in order to create a little bit more stratification in here in terms of the responses, but you can still see here it is quite muddled. That means again, like in the qualitative, we can ask for, "What do you mean or what is the most important we can do for followups?" In the survey, you get this kind of muddles fuzziness, which means, it's up to Foundations to really make their case and to articulate their vision. Yeah. Sometimes, the results are, things are fuzzy and things aren't clear. Sometimes, when you get that 70% at opensource, benefits, and foundations, that's a very clear result. This one would be one of the more fuzzy results.

David Bluestone: I will continue and please, anyone who has questions, just jump in. It's obviously, if you have something lingering, I would like everyone to just feel comfortable and just ask. Let me go to the next slide. We did ask about the specific leader in the survey. We asked a bunch of questions around general, what do you want from the Foundation? What's the ideal Foundation? At the very end of the survey, we design our research, so that it's an inverse triangle where we start broadly and then we get specific. Also, so that we don't cover any of the responsibilities at the outset.

David Bluestone: Our last section was very specifically around OpenStack and we did ask about specific projects. Here, I think in broad strokes, you have all over 50% in terms of definitely or probably consider. That's a good thing. All of these projects when given a short, and obviously you can't give the detail that probably these warrant, but when given a short explanation, all of these generally, a majority, a strong majority, 58% to 68% like these or would consider these projects. I think it's worth mentioning that the original project OpenStack is still leading the way, that has both the most intensity, definitely consider, and the most overall positively consider, definitely no problem.

David Bluestone: It's always worth mentioning that the other projects are useful in terms of curating and creating a better user experience, but the OpenStack project, the original OpenStack project is going to be the driver, the thing that brings people to the table. I think what is interesting here is that there are majorities who would consider the other projects that are not considering OpenStack, so you are bringing people in, that are not necessarily only thinking about OpenStack, right? When we get

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cross-sections with these folks, folks who would consider maybe Zuul or StarlingX or Kata, and you cross that with people who would consider OpenStack, it wasn't one-to-one.

David Bluestone: I guess a better analogy, it wasn't like a rectangle or square. Not everyone who would consider OpenStack would be considering the other projects and vice versa. You are bringing these folks to the table, which I think is important and probably one of the motivations I would imagine around you all's decision to bring in a new project.

David Bluestone: In terms of the methodological points, I would basically say it's way easier for me, is OpenStack is ahead of the rest, but the rest are always in the margin of error, so my statistics background would just ... I wouldn't say, "Oh. Everyone has to start focusing on Zuul more than Airship." I would just consider that 58% is always in the margin of error. It's a step change though for OpenStack original project.

David Bluestone: With that context around this idea that you can actually ... Folks would consider these other projects who are not necessarily saying that they'd consider OpenStack. The fact that it wasn't one-to-one. We did test, what about if you named a bunch of different summits and we put in as, this doesn't exist yet, but an open infrastructure summit as a potential name for a summit. What would you find appealing? You can see here that an open infrastructure summit, this idea of possibly changing the OpenStack summit to open infrastructure summit actually is almost double in terms of how appealing it is. You're bringing in other people.

David Bluestone: I would note in this instance with a crazy response, so I want to just ... I double, triple check the data. 56% of Chinese respondents say they'd be interested in an open infrastructure summit to just 17% OpenStack summit. Remember that China is one of our biggest drivers with OpenStack, so you're not losing our core, our base in China. In fact, I think we'd be bringing more people to the table. If there's a way to marry these two ideas where it's open infrastructure summit brought to you by OpenStack, that would doubly appeal to the Chinese market.

David Bluestone: I did want to describe that because that's a big number, 56% Chinese respondents. That was the second I think behind, I think it was Microsoft at 57%. Obviously, there were some greater numbers across the board. The fact that OpenStack had [inaudible 00:28:01] for those Chinese respondents was only 17%. There's a real opportunity here. Again, this is about signaling.

David Bluestone: It's about signaling that vision, that articulated vision. We included this quote on the right. We just put this on the finer point to what the data shows, which is I think you're in very early days having to define the infrastructure and you have to explain why and what it means. Doing that will have to be throughout the messaging of the summit. That's what an opensource [inaudible 00:28:28] says.

David Bluestone: This is in mind. This is the forecast. Folks are ready to hear about open infrastructure summit and it's possibly a way to signal this vision that OpenStack Foundation can bring to the table. Moving to the last section

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here about opensource. What is that vision and what underpins the vision of OpenStack Foundation? Well, opensource clearly is a north star, that OpenStack Foundation needs to double down on, triple down on. Again, you have one of these giant spreads where 68% say, "Opensource mission is important to me," versus 30% say, "It's not important to me." That's over two to one.

David Bluestone: Clearly opensource is important and I think it's also interesting that opensource technology is more innovative versus proprietary technology, again almost two to one. Opensource is good. It is a good thing to wrap OpenStack and OpenStack Foundation up with. If you take these same statements and you cut feasibility by people who think opensource technology is more innovative and opensource mission is important, you have massive differences in terms of people who like OpenStack. This is part of the story. This is part of the brand.

David Bluestone: Here, folks from [inaudible 00:29:50] when you look at the opensource community, there are options out there. There's like 25 different ways to do one thing. There is more and more ways every day. There is a lot out there in the opensource community and people think it's important and that it's innovative. Again, and this is across regions, across roles. Sometimes, and I would put out there, it's like different regions felt differently, I would definitely voice it, but this was uniform across the different roles.

David Bluestone: Okay, so opensource is important. Opensource is innovative, but it's useful again to meet people where they are by talking about why. What are the benefits and what are the challenges? We have to solve the challenges, maybe through projects, maybe through IOT, engagement with end users, and we have to remind folks and always emphasis the benefits. Here, you see two things. One, flexibility is the top benefit and security. I think security always tops both. This is one of the fun things about being a researcher in this field, is you can always rely on security being in your top three both three both in [inaudible 00:30:51] for any types of questions because it's just such a existential threat. Flexibility tops, so that is something that is useful to always have in our head.

David Bluestone: The other things here that comes out as the second tier benefits is just easy to use and most innovative. That's the positive [inaudible 00:31:10]. I do want to put over the positive motivation behind opensource. I do want to flag here, avoiding vendor lock in, is a little lower than we were anticipating, 16%. I think this has a little bit to do with the question design. Vendors using opensource technology in production.

David Bluestone: It's not just about opensource as a concept, which people say, "Opensource is free or Opensource is avoiding vendor lock in," but using it in production I think is more technical. We wanted to be more technical in this survey than just more broad based. That would be my hypothesis for why vendor lock in is a little bit lower down the benefit.

David Bluestone: In terms of drawbacks, just inconsistent standards. If we solve a [inaudible 00:31:50] that opensource is an ideal role of an opensource foundation is standards, we see why, because when people look at the drawbacks in opensource, it's inconsistency of standards is a top concern. Again, the other concerns that came through, if you add up those two integration questions, that also would elevate that to a top concern of 29%. Difficulty in integration with environment and difficulty of integration with other opensource technology.

David Bluestone: Again, when we asked our [inaudible 00:32:25] about which is more secure, 61% said proprietary technology is more secure compared to 37% say opensource. That's just another data point for why the security issue is at the top. Again, if we think that opensource is our north star, then it's worth always emphasizing the benefits and why it's valuable and why it's useful and why this is the future and this would deliver the best experience to users. Also, speak and try to explain any concerns.

David Bluestone: We also asked, and again we have [inaudible 00:33:02], same 66, 31, similar two-to-one split, which is well what does opensource technology do related to my business? 66% and two-thirds say, "It allows me to focus on building pieces that matter in my company," versus, "It requires too much maintenance and causes more problems than it solves." Again, it's seen as something that can unlock value. Its increasing productivity is adding value.

David Bluestone: The fact, we also asked about whether opensource solutions integrate easily with the current environment and 57%, so a slightly smaller, but still majority, say that they integrate easily. When you look at intensity, almost three-quarters of that 57% were like, "It's somewhat easily, not strongly easily." This again is an area we saw before in the previous slide, that a concern is this integration piece and when you ask about integration, people like, "Yeah. It integrates easily, but it's not like I feel strongly towards it." It's somewhat easy. I think that's another data point to why they're looking towards news projects to help basically create better solutions for them.

David Bluestone: Now, I want to focus ... The next slides here on what exactly, when we talk about opensource, what exactly are companies doing with opensource? You can see here on the left side, approximate percentage of the company's applications of using opensource. It's a fairly large spread. Most of the people are doing 50% or less of their applications using opensource technology. We know that people think it's important. We know that people think it's innovative. There is still room to grow here and move those percentages up. It's right now about 50-50, people who develop above or below 50% of their applications using opensource technology.

David Bluestone: We also asked about their contribution, but 75% say that they contribute to opensource projects. Only 17% say the entire projects. [inaudible 00:35:07] is just code and then a quarter say they contribute comments or questions in forums. That we assume forums like Stack Overflow and whatnot. Then we also asked, okay, is this increasing in importance or not? That's just unambiguous. 81% say it's increasing. It will increase in

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importance in their company. 27% much more important in the next few years and a majority say it's somewhat more important. It's unambiguous here that people are trying to contribute, that a very strong majority say it's going to be more important over the next few years.

David Bluestone: That leads me again to that left graph, left-side graph, which is we need to probably anticipate and also encourage people that shift up, we should see those blue bars moving up the scale because opensource will only become more and more important. Again, looking at the breakdowns by regions. I wanted to flag the Chinese market. Again, it's very important to OpenStack. 37% versus 20%, so beyond a margin of error, say that opensource tech is going to be very important and that 55% say opensource is somewhat important. In China, in an area that we know is fundamental to OpenStack's market, this is even more pronounced. If you add that together, we're over 90%, 92%, that say opensource is going to get much or somewhat more important in the future.

David Bluestone: I want to end just with some openings that we see from this research. Up until this point, my intention was just to report the facts on the ground, to give you all a pulse of the market across geographies, across different roles. The final four slides were intended to spotlight different openings that we see for you all to make decisions around regarding OpenStack Foundation. The first one here is, open infrastructure is appealing. It can be useful, but it's not well defined. I know [inaudible 00:37:21] opening would be for the OpenStack Foundation to be very deliberate and outward front in terms of defining this as a useful tool.

David Bluestone: As I said before, this actually came after we asked about the name, 'opensource summit' versus 'Openstack Summit.' We then, later in the survey, gave them a definition of an open infrastructure and then asked. Obviously, we didn't want to do the definition before because we didn't want to bias those results. We wanted to have that be a clean read as if someone was just seeing advertising, digital advertising, or someone heard from their boss about this summit. We wanted to that to be a clean read.

David Bluestone: Then we ended up defining it and seeing, okay, is this useful to your workflow? Here, you see a very strong majority, over 70%, say that ... 72%, say that yes, this would be very useful or somewhat useful. Already we have what we think is, this is a compelling idea. We then took just the quarter who said, "Yes very useful." These are what we call the lowest hanging fruit. We said, "Okay. What are the following phrases that you use to describe opensource?" These are people who said, "Yes. Opensource is very useful for workflow." Then we said, "Well, describe it. Which of these phrases describe it?" Again, very similar, select one just like the other one. You see, okay, open infrastructure built from opensource components. That's about a third. That's good.

David Bluestone: Then 41% virality has a very confused definition here. Shared infrastructure, IT infrastructure, infrastructure based on contributions of these big companies, physical infrastructure like Ride Share. In the

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focus groups, we heard people talk about the bike ride share. They were actually talking actual open infrastructure. There is this ... Then 3% say outdoor physical infrastructure. I believe in China we heard someone say it was an outdoor bathroom. Like actual infrastructure that is outdoors. Again, the term needs to be defined. It's compelling when we have a definition, but still even people who say it's compelling need to be taught. There's an education component here.

David Bluestone: We move to the next slide. Again, I've showed this slide before, but I want to emphasize it. Just that point that I made earlier that about one in two participants who consider adopting OpenStack would definitely consider adopting one of the other projects, but that also means that about half would not. Again, these new projects have potential to attract new users and if it's under the common theme or the cohesive narrative vision of open infrastructure, then maybe that's a way to bring new users into the community.

David Bluestone: This might suggest why the summit is an opening here strategically to bring those folks in because you can say, "It's OpenStack first and foremost, but it has these other projects to meet your experience using open infrastructure." Similar, easier, and more productive. We also did a market assessment or just about market trends and technology trends that are on the horizon. This is a question we've used in other studies as well. We find it's very predictive. You can see here, private cloud, about 62% say they're currently using it. Another 28% say that they might use it. Private cloud is obviously going to be the biggest technology here of the ones we tested.

David Bluestone: Then you see some other types of technologies that have very strong planning on using numbers and these are coinciding with some of the special focus areas that OpenStack Foundation has been thinking about. The top, plan to use in the next 12 months, network function virtualization, and edge computing, but right behind there, containers, CICD. 26% plan on using in the next year. We see these are maybe not currently using, but they're certainly in the pipeline and it's useful to get out in front of these things and to have specific offers about when these technologies become integrated into their current workflow.

David Bluestone: There's a solution to those and there's a way to use those technologies that are on the cusp or in the pipeline of these companies by using them in their environments, opensource shared environments. If you move to the last slide, I've been talking a lot about articulating a vision. We did test some vision statements.

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David Bluestone: A lot about articulating a vision, and we did test a mission statement. So at the very end of the survey so I didn't bias anything else before it, but we did say okay, we want to end with some statements from the OpenStack Foundation about admission. And here were the top three. We tested I think six. Six, maybe even eight? That's a embarrassing

oversight, I should know that. I think we tested six total statements, but these are the top three and we focus on these top three because they were all up over 60% in terms of much and somewhat more favorable. The rest were in the low 50s, so a significant beyond the margin of error difference.

David Bluestone: The first message I want to point out, and all of these are within the margin of error. What I want to emphasize, this was a step-change above the other statements. So we want to just focus on these. And it all kind of together tells a story. One is that OpenStack Foundations, its mission is to increasingly support this open-sourced IT infrastructure, right? It's built by the community, it's following use cases wherever they are. It's single crowd, multi crowd, enterprise [inaudible 00:43:09] It's goal is to ensure that IT infrastructure is more and more open-source. We know open-source is important, and this is kind of a nice way to double down on that or tap into that.

David Bluestone: The second is about this curation right, so it's nice when you see in a survey multiple data points that support a similar conclusion. And so our second strongest message was that open sort of foundation. It's theme is to help people who build open-source, work together to build solutions for any modern stack. They can find curated projects they trust. So again you're seeing that concept come through, and the statement there earlier in the presentation suggests the same.

David Bluestone: And last, it's about ... The third strongest message was about filling the gaps. And here you see tapping into some of the special focus areas, things that people know are coming down the pipeline. From [inaudible 00:44:02] architecture as computing [inaudible 00:44:04] data from our infrastructure. You know, it's about filling the gaps in open-source infrastructure by advancing solutions and projects to have a better user experience. All these things I think could be said in a cohesive way to articulate a vision about why open-source foundation was doing what it's doing to both make the open-source experience better for users but also, specifically around the projects that it has that it is focusing on to fill the gaps and to be highly curated in its selection of those projects.

David Bluestone: So to conclude, I'll restate the key findings and then finish with ... Let's do openings and open to questions. I'm right around my time. And so we have about ten minutes for y'all to ask questions and for OpenStack folks to kind of take their take aways, their reflections.

David Bluestone: So our market research shows that OpenStack's reputation, it's powerful, it's flexible. For some, mentioned that it's difficult to use, complex. But it's capability is on par with the other major players, and the more it's able to publicize itself, the better that capability is. The ideal for foundations, the ideal foundation is again to curate new projects, to write guidance, to navigate open-source. Open-source has to be the North Star, we have to double down, we have to wrap up OPEN/SEK Foundation around open-source. And then the [inaudible 00:45:34] openings that we see is there's potential here to start with the Summit by broadening the foundation's scope to be inclusive to new projects around open infrastructure.

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David Bluestone: You know, that one slide where you saw 32% just without even this existing. A third, you know, that was a top Summit they'd be interested in attending. Doesn't even exist, and it's 16 percentage points higher than OpenStack Summit. I think that's compelling, I think that is a [inaudible 00:46:02] opening that the foundation should explore.

David Bluestone: Second, you know, this idea of articulating the vision. People think that open-source foundations are good. They have a very muddled sense of what they actually should be doing. So the more we can articulate and be explicit about that vision, the better. And then lastly, elevating new projects and welcoming new [inaudible 00:46:24] Thinking about that market trends, tech trends slide and thinking about okay well, these are coming down the pipeline and anything that's a new project that can kind of make sure that the experienced ones, people integrate those into their work flows, those technologies and tools into their work flows, the better. Because people are looking towards them as what's coming next, and it's important to make sure that the OpenStack experience is inclusive and welcoming. You know, folks who are working on those areas, and wanting to integrate those technologies into their work flow.

David Bluestone: So with that, I will pause, hand it back to Lauren, Mark, Jonathan, the OpenStack team. And then be here for questions. I hope this is interesting. I hope this was clear, and if anyone wants to ask any questions I'm more than happy to answer them in the next ten minutes, and then also be available for any follow-ups.

Lauren: Awesome, well thanks so much David, and thanks to your team. I know that was a lot to digest in the time that we had so, I did want to just open it up for any questions. But also just kind of reactions or thoughts, if there's anything that stood out to you as notable or surprising or anything along those lines.

Annie: Hi, this is Annie. I just have a quick question for David. I'm just curious, do you have a breakdown of the participants. You know, who are the developers and how many of them are developers, how many of them are business decision makers? Do you have that breakdown?

David Bluestone: Absolutely. Yeah, I went very quickly through the methodology slide. We have 30% of our ... First, everyone in our survey said that they either directly or have material influence on decision making. You know, this is a decision maker survey, so we did screen out anyone who said that they have only indirect influence, they don't have influence at all. So we did try to have that as a screen.

David Bluestone: Second, and I didn't mention this, we always ... You know, we've been doing this for five years now. We've learned some things, and we have some kind of tech knowledge-based screens to again make sure that we're not letting in folks like myself or my partner, who technically we know about these things but we don't know enough to qualify for the survey. So, you're terminated if you kind of ... We have a couple of traps where if you answer yes, I know about this term but if the term doesn't exist, we use [inaudible 00:48:45] as a service, which is not a real thing.

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David Bluestone: But the people who select that as something they know that they're familiar with, get kicked out of our survey because they're most likely lying. So we have a couple knowledge ... So that gives you a sense of kind of the quality of our system, which I think is important. You know, these are the same panels that Gartner uses, that Forrester uses, but we want to have an enhanced screening mechanism so that we can make sure that these are actual decision makers who are actually engaged with the tech.

David Bluestone: With respect to the role, 30% were ops and architects. 20% were Devs and DevOps. 25% were IT managers, and 25% were CIO, CTO, and [inaudible 00:49:21] So we set some quotas, try to have roughly a quarter to about 30% of the sample be broken down by those four bigger buckets of our decision makers. Does that answer your question?

Annie: Yeah, sounds good. Thank you.

Speaker 3: So you mentioned a bit about how you select these folks. I guess further back, how do you find them to begin with? I'm a little curious about that.

David Bluestone: Absolutely. And I probably should've spent a little more time on methodology, it sounds like, so apologies for that. We use the U.S. and I think now globally the largest panel provider out there. Online, is it an online survey? The online panel that we use, it's actually recently merged, the two largest panels so that's why I think it's actually now the largest global panel provider. It's the same panel provider that Gartner uses, that Forrester uses, these are folks who participate in several types of studies. They have data on these people, so we basically are targeting IT professionals, and then we have our [inaudible 00:50:28] screening to make sure that they are knowledgeable, that they're decision makers and that they're not just in the industry, but that they are ...

David Bluestone: And again, I actually mentioned this is not just IT industry folks, this is anyone who says that they are involved in IT in their day-to-day work. So this is, you know, broad-based. It's FinServ, it's manufacturing, it's anyone who's dealing with IT. At this point, it's not enough to just talk to IT professionals in the IT industry because every company is [inaudible 00:50:55] So we try to be broad based in that sense as well.

Speaker 3: Cool, and a follow up question is are the survey takers compensated in any way?

David Bluestone: So by participating in a panel, I think you earn credits. I don't know if anyone kind of remembers back in the [inaudible 00:51:13] e-rewards, so you earn credits by participating in a number of panels. It's not like we're sending out checks to every single one of these [inaudible 00:51:20] but they get by participating in enough panels, they earn credits so they can exchange those credits for different things. They're signed up to be part of a panel, the more active a panelist they are, they get credits. But it is not transactional, they don't know who we are, it's double-blind.

David Bluestone: Again, we do other tracks as well, so you have folks who are just on here and just clicking, straight-lining through a survey to get done as fast as possible so that they can gain more and more credits. We do a [inaudible 00:51:55] trap where anyone who is within two [inaudible 00:51:58] of the average amount of time taken, they are automatically kicked out. We don't even look at their data. We just assume that those people are cheating. And then we also have some traps throughout the survey like I mentioned. We ask them how well do you know this thing which is actually not a real thing, and then we terminate them because we know that they are not actually reading the questions. So we want to keep it very high quality.

Speaker 3: Cool. I think you said this, I just need to clarify, the OPEN/SEK Foundation doesn't pay these people directly to answer an OPEN/SEK survey. It's more like a-

David Bluestone: No. They have no idea. So that's also why we structure the survey so that all the OpenStack questions are at the very end. And in fact, we do some masking in our question text, where they ... This survey is a broad-based survey all across the world, you know, and every survey there's focus on one company and one foundation. And then it has a [inaudible 00:52:49] You know in this survey, and then we have in big, bold letters as if it was just plopped in, a randomized in this survey we're focusing on OpenStack Foundations. So we do some masking as well, and we put those specific OpenStack and OpenStack Foundation questions all towards the back, after the market trend data, after ideal foundation data, after the capability which I saw has much different questions, so it won't be any points. So they just know they're taking a panel survey. They don't know even Clear Path's name. It's double-blind in that sense as well.

David Bluestone: And then, at the end, they just assume that they got randomly selected OPEN/TEK as their follow-up deep dive questions. We try to do these things to make this as unbiased as possible. Obviously we do as much as we can around that sense. At the end of the survey, other inklings they have like huh, I wonder if OpenStack was part of paying for this. So they may be, but we do as much as we possibly can to make them not think that. And certainly that's informal.

Speaker 3: That all sounds great. One final question is are people allowed to go back in the survey once they kind of reach the end and change their answers, or-

David Bluestone: That is a great question, and they are not allowed to go back.

Speaker 3: Thank you. Okay-

David Bluestone: And in fact, if they want to go back and they try to go back, then they actually just are an incomplete and we call them just a log-off, because we don't want them to change their mind.

Speaker 3: Good, thank you.

Purkesh: I have a question. Just wanted to find out if there a possibility of correlating between the leading projects like Zeus, Starling, XCart, and [inaudible 00:54:29] you mentioned. If you can correlate that with the, what do you call the ... How people are using in future next year, certain areas. So is there any connection between the two?

David Bluestone: Sure, so that slide where I said the market trends, the technology coming down the pipe and then correlating that with people who think it's more favorable that they're ... Yes, absolutely. That would be an interesting cut and we'd be happy to provide that to you. I think I would be ... I probably can't do that in two minutes, I'd want to think about it. I'd need to run the cross tabulation, but definitely we can provide for you, sure. That's an interesting question.

Purkesh: Yeah, we would like to have that to know whether the projects that are there in the pipeline, are they making sense for the future, what trends are indicating.

David Bluestone: I think it makes total sense to do that. Mm-hmm (affirmative).

David Bluestone: Yeah, so I think we're at the end of our time just about here, I wanted to make sure that we got everyone's questions in and just talked about next steps. Are there any other last questions before we talk about next steps?

Annie: I do have one more question. I don't know if we can answer it here, but my question is, which I did not really get from this presentation is obviously, OpenStack brand is very good, it's very important, but if we are going with the open infrastructure route, is that gonna create an impact on the OpenStack brand? Is it gonna be a negative impact or positive impact?

Speaker 3: Yeah, and I-

David Bluestone: I mean, I don't know if OpenStack folks, you want to mention ... I would like to just reemphasize in the survey, we did test open infrastructure Summit, and again I want to point our market, like China really has a strong of going towards OPEN/SEK itself as technology, yet they were incredibly interested in OPEN/SEK for a Summit. It suggests to me it's only something that is additive based on the data. We also again, you look at the same question that Purkesh asked about the different projects, that you have people who would definitely consider OPEN/SEK but aren't considering the other projects and vice versa. The people who are considering the other projects and not OPEN/SEK, so it feels like we can bring those people in. So we didn't see any blow back necessarily, and-

Speaker 3: Yeah, I think ...

David Bluestone: Yeah. Sorry, go.

Speaker 3: David, I could jump in and just clarify, because I think we've worked possibly conflating a couple of different potential options that are on

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the table. One is around the Summit itself, and I think that the data supports the notion that if we are to rebrand the Summit, it actually gives us the opportunity to emphasize each of the projects including especially OpenStack as part of the Summit. So I think that the data supports the idea that if we change the name of the Summit, it wouldn't damage the OpenStack brand.

Speaker 3: I think the second question is more around changing the name of the foundation. I think to me, you know, that's potentially a trickier question, and maybe the data's not giving us as clear of a signal on that. So I think that it's important to kind of separate those two things, and most of what we've been talking about in this presentation around sort of what the data's pointing to is about the Summit itself.

Speaker 3: Part of the thinking around that as well, Annie, is that if you look at what the Summit is, it's actually already bigger than not just OpenStack but actually it has for many years extended beyond just the projects hosted at the foundation. So even when you talk about having Starling, [inaudible 00:58:30] and OpenStack at the Summit, you're still gonna have things that aren't part of the foundation hosted projects, right? There's tons of sessions on Kubernetes and Docker and TensorFlow and on and on, so I think in that sense that it wouldn't be ... I think gonna cause any concern around looking like the OpenStack brand is something we're abandoning, because it would be very much embedded in how we talk about the open infrastructure Summit versus like I said, if we were to actually change the foundation name, that potentially is a different ... It's a much different scenario in my mind.

Speaker 3: And just lastly, I'll mention that we, in the past we have just kind of reached out to all of the sponsors of the last two Summits and asked informally basically hey, if we were to change the name of the Summit next year in 2019, would you sort of be for, against, or neutral. I think every single person we talked to was either in favor, which was the vast majority, or sort of neutral. I don't think we got a single company that came back and said that's a bad idea. So that's just another data point, and we're still getting that feedback coming in but in terms of the Summit side I think we can do that, in my opinion in a way that doesn't damage or kind of put the OpenStack brand at risk.

Annie: Great. Thank you.

Lauren: Yeah. And I know that we're over time now. Obviously there's a lot of information here, and a lot of different ways that we can look at it and that we're going to be applying this. So, we'll definitely be sharing more of how we are planning to weave some of these insights into our messaging as we're heading into the Berlin Summit, and announcements that happen around that as well as a lot of the content that we're continuing to produce. But we'll definitely be sharing more of this data throughout the rest of the year, and if you have any specific questions or a specific interest around it, please let us know and we'll try to pull together information to help answer those questions.

Lauren: Awesome. Well thank you all for your time, we really appreciate it, and like I said, if you have any questions please shoot them over and we will share this recording and the slides as soon as it's available.

Speaker 3: Thank you everybody.

Lauren: Thank you.

Speaker 3: And especially Clear Path for everything you've done to pull this data together and do all the research. Very, very valuable.

David Bluestone: Fantastic. And we'll do the follow up, and any other questions we're happy to be available. Our work does not stop. If you have any questions about data, we're happy to answer.

Lauren: Thanks.

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