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# Seize The Open Source Opportunity Through Comprehensive, Optimized Strategies

Organizations That Combine Intentional Strategy With Skilled  
Resources Better Position Themselves For Modern IT Excellence

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FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY PERFORCE | APRIL 2021

## Comprehensive, Optimized Strategies Unlock Open Source Benefits

Open source software (OSS) has cemented its role as a critical technology agenda driver for enterprises. However, too few firms take the necessary steps to optimize their OSS strategies like designating an OSS strategy lead and establishing and communicating policies for OSS usage and contributions.<sup>1</sup> It's critical that brands also align their strategies to incorporate critical services like support, training, education, and consulting to drive OSS benefits.

Without comprehensive and optimized strategies that govern the critical pillars of running OSS, organizations risk missing out on the benefits it can deliver, including greater flexibility and better efficiency, time to market for products, customer and employee experiences, and more.

### Key Findings



OSS is a critical enabler of IT agendas. Organizations increasingly turn to OSS to power digital transformation and to drive efficiencies, flexibility, and interoperability within their market.



Maximizing OSS benefits requires an optimized, comprehensive strategy. Companies that have optimized strategies across all pillars of OSS experience better outcomes compared to their less mature peers.



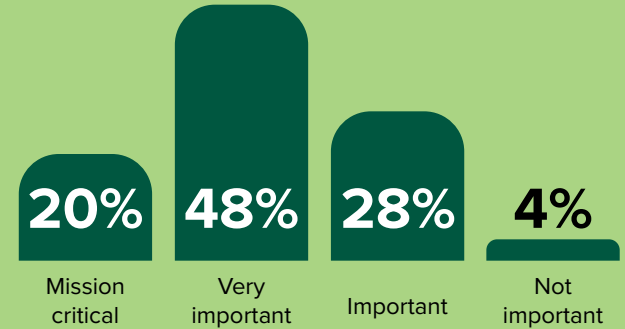
OSS strategies require skills and partners to flourish. Gaining more expertise, accessing training, and onboarding qualified third-party external assistance are top drivers of OSS success.

## Open Source Is A Critical Driver Of Modern IT Agendas

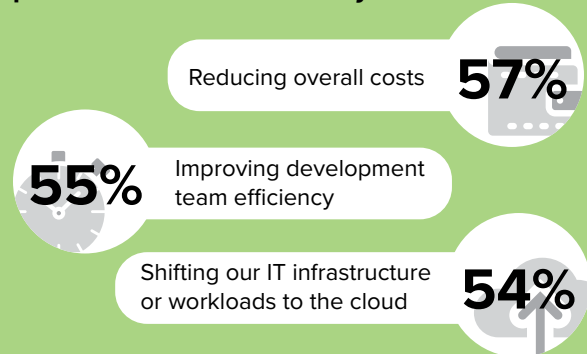
OSS is a critical driver of most organizations' important digital agenda items. For example, 68% of survey respondents report that OSS is a "Very important" or "Mission critical" enabler of digital transformation initiatives. OSS will let them harness digital assets, skills, and ecosystems to continuously improve customer outcomes, drive revenue growth, and increase operational effectiveness.

More than half of respondents also see OSS as an enabler for objectives including reducing costs, improving the efficiency of development teams, and cloud migration initiatives. Taken together, OSS emerges as a central pillar of enterprises' efforts to meet current technology benchmarks and future-proof IT strategies to keep up with developments.

### "How important is open source to your company's digital transformation initiatives?"



### "For which of the following objectives do you deploy open source solutions today?"



## OSS Is Increasingly The Default Strategy For Enterprises

OSS approaches are becoming the go-to strategy for many IT organizations, which is no surprise given how they place OSS at the core of their most pressing IT initiatives. Almost all (96%) of respondents have formed policies that allow for OSS adoption at the team, departmental, or enterprise-wide level. Thirty-seven percent of survey respondents report that OSS is prioritized by default across the enterprise. However, a large percentage of respondents state that open source adoption is a team decision, which can lead to fragmentation and problems with interoperability, security, and scale.

Enterprises will increase reliance on OSS going forward. Nearly three-quarters of respondents say their organizations will increase their reliance on OSS this year, while 26% intend to maintain the current role of OSS in their strategies, and just 2% plan to become less reliant on it by 2022.

### “Which of the following best describes how your organization approaches open source adoption?”

We have a company-wide policy to prioritize open source

37%

Teams make decisions on open source adoption independently

38%

Open source policy varies by department/division

21%

Per company policy, open source can be used only by exception

4%

### “Which of the following statements best describes your organizations’ plans for open source this year?”

We plan to significantly increase our reliance on open source technologies

28%

We plan to increase our reliance on open source technologies

44%

We plan to maintain our reliance on open source technologies

26%

We plan to decrease our reliance on open source technologies

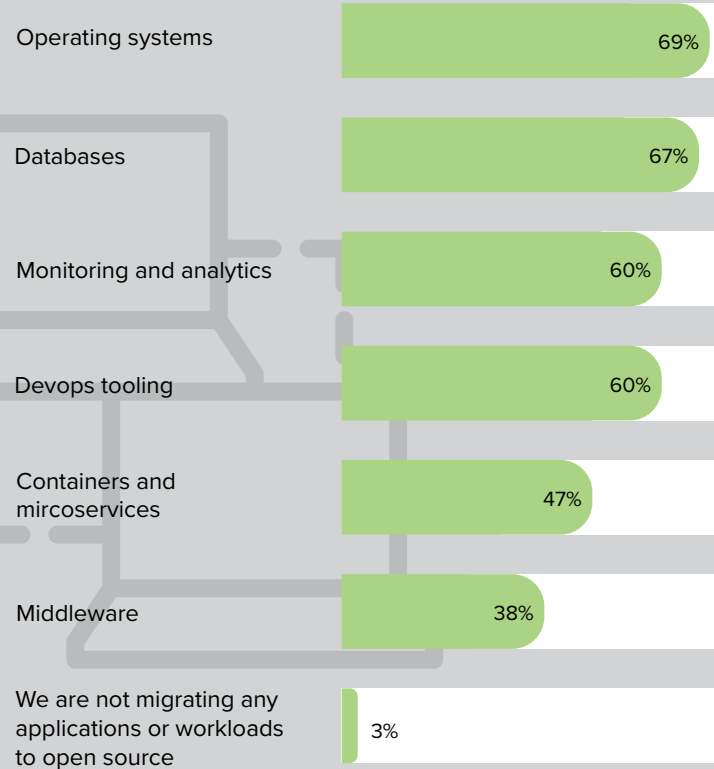
2%

## OSS Is Too Important To Leave To Ad-Hoc Strategies

Reliance on OSS will only continue to grow. Many enterprises don't understand how individual open source technologies operate, though, or how to take advantage of OSS in a comprehensive manner.<sup>2</sup> These ad-hoc strategies threaten key pillars of IT infrastructure.

Sixty-nine percent of respondents plan to move operating systems, and 67% are looking to migrate their databases to OSS. Sixty percent plan to have monitoring, analytics, and DevOps tooling on open source as well, and nearly half are looking to shift containers or microservices. Overall, 97% of decision-makers report their organization's intention to move at least one aspect of their IT infrastructure to OSS.

### “What areas of your IT infrastructure are you considering moving to open source?”



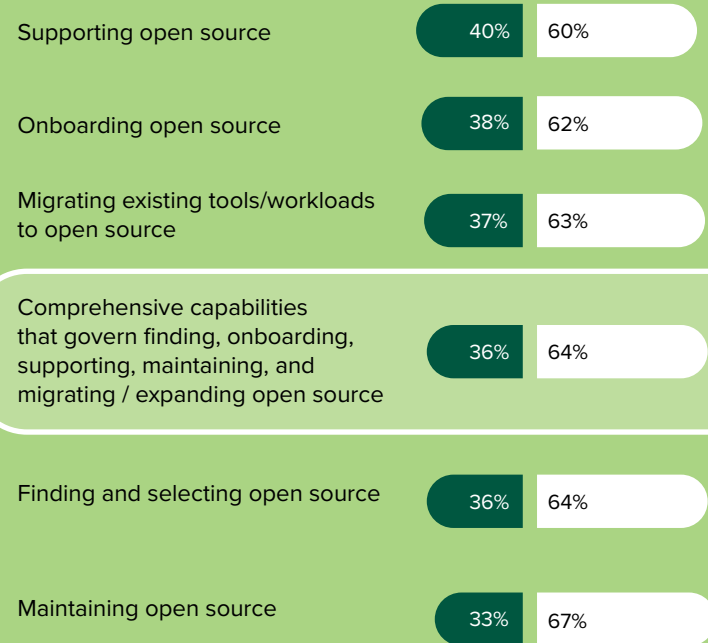
## Non-Optimized Support And Lifecycle Management Limit OSS Success

Unoptimized, siloed strategies can make it difficult to fully realize open source success. At best, 40% of respondents report their organization has optimized strategies for supporting open source, while 64% have sub-optimal strategies governing the comprehensive set of OSS capabilities.

When companies fail to create and align behind optimized, comprehensive strategies, they struggle to hire and retain high-end talent who prefer OSS environments. These organizations also fall behind in maintenance lifecycles, pay for software innovations they could have accessed for free, and ultimately perpetuate a culture of OSS avoidance that can exacerbate and perpetuate personnel and cost challenges.<sup>3</sup>

### “Which statement best describes your organization’s approach to each of the following aspects of your open source strategy?”

Optimized approach
  Non-optimized approach

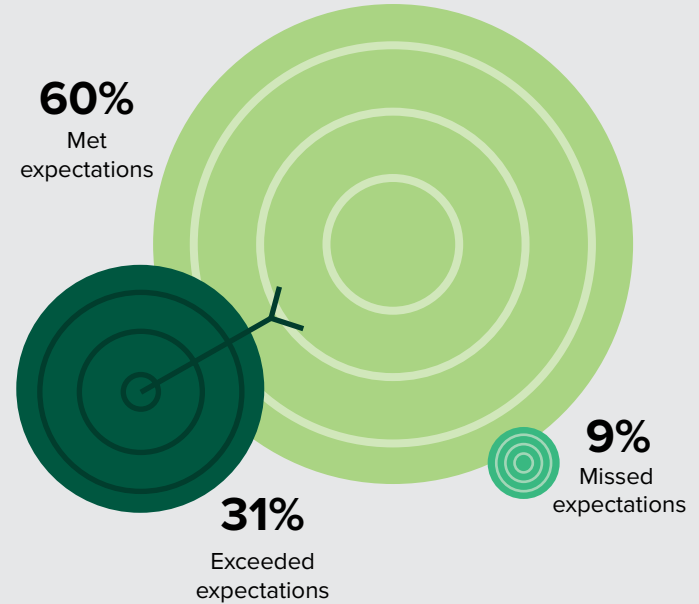


## Very Few Organizations Come To Regret OSS Implementation

Enterprises that have implemented OSS tend to be highly satisfied with the results. Ninety-one percent of respondents report their organization's OSS initiatives either met (60%) or exceeded (31%) expectations. But this same data illustrates the value of approaching an OSS initiative with an optimized, comprehensive strategy for this critical technology driver.

An enterprise-wide strategy for using and contributing to OSS is a critical prerequisite to the success of OSS programs within the enterprise.<sup>4</sup> Respondents who currently have an optimized, comprehensive OSS strategy were 82% more likely to say their firm's OSS initiatives exceeded expectations compared to peers whose strategies are less optimal and more limited in scope.

**“To what degree has your open source initiative delivered on expectations for your company?”**



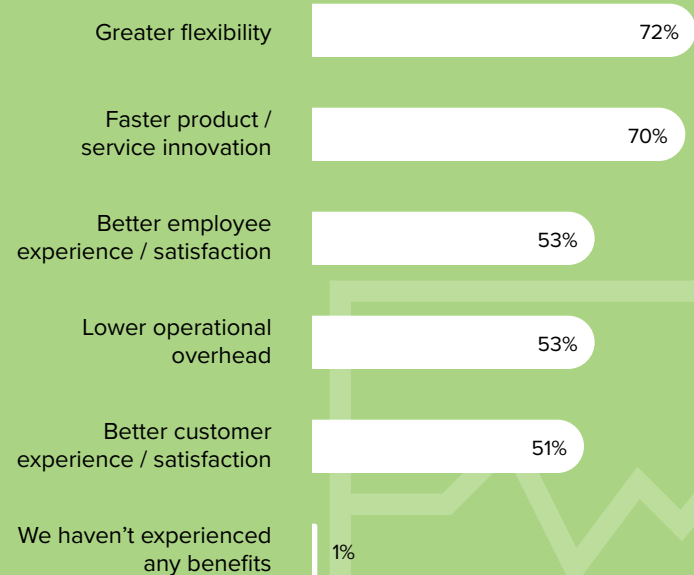
Organizations with optimized strategies are 82% more likely to have OSS initiatives exceeded expectations

## Intentional OSS Strategies Lead To Better Business And Customer Outcomes

OSS implementations lead to substantial, long-lasting benefits, which is a big reason for their popularity among businesses. OSS implementations accelerate application development and deployment, empower digital innovations, and ease ecosystem adoption of products and solutions.<sup>5</sup>

Respondents point to OSS driving greater flexibility, faster time-to-market, shorter innovation cycles, and lower operational costs. Crucially, OSS adoption links improvements in both customer and employee experience, leading to more satisfied and profitable relationships in both areas. Overall, 99% of study participants realized at least one of these benefits.

### “Which of the following outcomes have you experienced with open source adoption?”



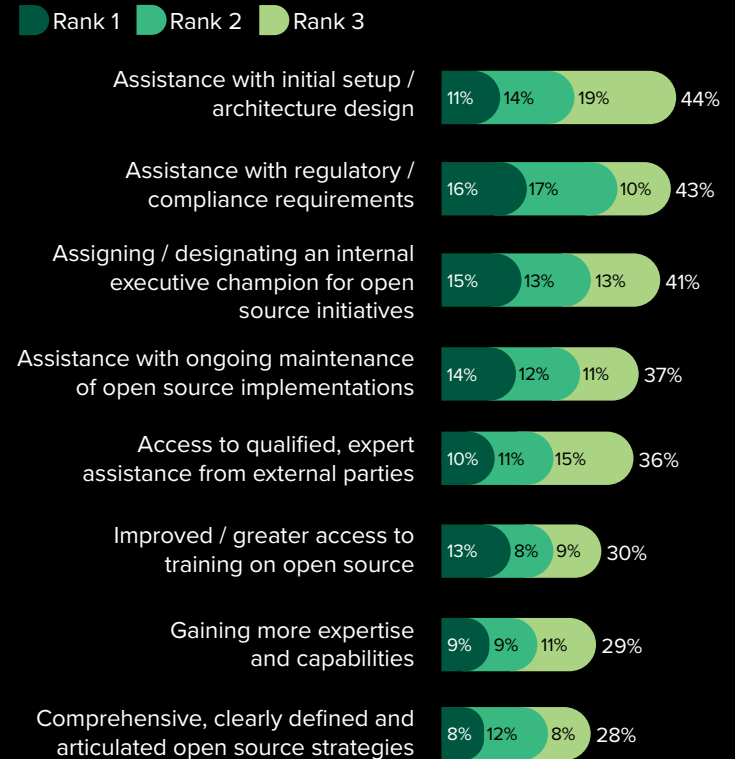


## Pair Comprehensive Strategies With The Internal and External Skills To Execute

Organizations must execute comprehensive, optimized OSS strategies with qualified internal and external expertise to realize the substantial and sustained benefits of OSS. Forty-four percent of respondents report that comprehensive, clearly defined OSS strategies drive open source success, while 43% believe more expertise and capabilities are needed to achieve it.

But that expertise often requires external support and supplementation even if coming internally, as 41% of respondents believe their organization needs more and better training for internal resources, and 37% of respondents want access to qualified, expert assistance from external third parties to ensure their implementations reach their full potential.

## “Which of the following factors do you believe would be most likely to drive successful open source implementations at your organization?”



## Conclusion

The majority of IT leaders see OSS as a critical driver of their IT agenda. Because of this, it's become their go-to strategy when modernizing business-critical assets. Yet realizing OSS benefits can depend on two critical factors:

Teaming with the right partner maximizes OSS success. While OSS is free and open, it's still complex and requires expertise to maintain, support, and operate at scale. Enterprises adopt OSS to save money and innovate, not to find new ways to consume valuable development and IT resources. That's why finding the right partner to help you with migration, ongoing management, and support can maximize the value you get from OSS applications.

Enterprises that adopt a comprehensive OSS strategy benefit the most from OSS. Having a comprehensive OSS strategy clarifies who will lead OSS initiatives, OSS usage governance, the role of internal resources, and external support services. Defining these areas will help pave the way to leveraging OSS as a critical IT enabler.

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## Methodology

This Opportunity Snapshot was commissioned by Perforce. To create this profile, Forrester Consulting supplemented this research with custom survey questions asked of open source and cloud adoption decision-makers at North American enterprises. The custom survey began and was completed in March 2021.

### ENDNOTES

<sup>1</sup>Source: "To Maximize OSS Value, Create An OSS Strategy," Forrester Research, Inc., March 27, 2020.

<sup>2</sup>Ibid.

<sup>3</sup>Ibid.

<sup>4</sup>Ibid.

<sup>5</sup>Source: "The Benefits Of An Open Source Strategy," Forrester Research, Inc., April 3, 2020.

### ABOUT FORRESTER CONSULTING

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## Demographics

### COUNTRY

US (66%)

Canada (34%)

### SIZE

\$500M to \$99M (21%)

\$1B to \$5B (57%)

\$5B+ (23%)

### DEPARTMENT

IT (73%)

Operations (27%)

### INDUSTRY

Technology / services (36%)

Financial services (22%)

Healthcare (19%)

Other (23%)

Note: Percentages may not total 100 because of rounding.



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