

CKAN Stewardship Proposal

Executive Summary

Datopian and Link Digital would act as joint stewards committed to the ongoing and active participation of the wider CKAN community including users, developers and vendors.

OKF would retain its underlying ownership of key assets and move to the role of the "trustee" with limited responsibility for day to day activity but with the ability to ensure the stewards stay true to the mission.

To secure the leadership and investment needed for CKAN to remain competitive – and to grow to meet emerging market needs – it needs leadership that is clear, dynamic and invested. That requires commitment and involvement. **We believe that is best served by a) appointing the two lead investors and curators of CKAN over the last 5-10 years to be the stewards for CKAN going forward (Link Digital and Datopian) and b) having OKF retain a trustee role to ensure ongoing commitment to the mission.**

End-users and other stakeholders will benefit from a clear point of contact within the CKAN project that is responsive. Appointing a small, highly accountable and identifiable group of stewards is an effective and immediate way to ensure that.

Key aspects

- OKF retains “purpose trusteeship”

- The proposed Stewards are deeply experienced and committed to working together and with other existing stakeholders e.g. in government and in technical team
- The Stewards would commit a proportion of their CKAN-related surplus going to OKF or OKF associated entities to promote open knowledge
- The Stewards are guaranteeing resolution of outstanding technical issues in a rapid timely manner e.g. migration to Python 3
- The Stewards offer an immediate combined investment of \$70k USD
- The Stewards will continue to actively engage and seek the participation of the wider set of stakeholders
- This proposal is from 2 ready-to-commit vendors with a strong connection to OKF in both principle based action and specific alignment to CKAN's mission surrounding a community of open data advocates contributing toward an open data project.

Executive Summary	1
Preface - Relation to the “CKAN Community” Proposal	3
Why We Believe this is the Best Approach	5
Why are we interested?	7
Intentions	8
The Setup	9
General Principles	9
Contribution back	9
OKF Supervision	10
Leadership and Responsibility	10

Preface - Relation to the “CKAN Community” Proposal

Both parties to this proposal have acted in good faith to help with the “CKAN Community” proposal with its additional set of contributors. However, despite our best efforts we feel it falls short in ensuring the future of CKAN in terms of active leadership both for technical direction and the project as a whole, as well as ensuring a healthy and dynamic community. As the two oldest serving members of the CKAN community we have the capacity to take CKAN forward in the way it deserves and needs as well as well as to secure the support and alignment of the broader base of users and potential contributors.

In large part, the community proposal continues the current setup with minor tweaks to governance, vendor support and resourcing. However, the **resourcing commitments are aspirational** with no certainty that they will be delivered on.

From the community proposal process it is clear that invested individuals want control of artefacts but no strong leadership emerged from the group as a whole. This puts doubt into any assumption that the community proposal would be easily followed with any real action. In particular;

- The community proposal was difficult to coordinate due to the small number of active participants. It also does little to address issues surrounding parties who join with no intention of supporting the project outside a joining fee and an annual subscription.
- Despite an ambitious modelling of fund contributions, only three parties are capable of providing funds in the short term. Within the context of these three parties trilateral agreement is uncertain. However, bilateral agreements which benefit the project and it's community of contributors and users is much more likely. The history of contribution to Open Knowledge initiatives provided by Paul Walsh and Steven De Costa over several years grants substantial confidence that as stewards they will come to accord to steer the project in alignment with Open Knowledge principles.

Why We Believe this is the Best Approach

CKAN is an open source project that is building a complex, “end-user” (vs developer) product. Almost all open source projects face investment challenges because of their ‘free community value’ over ‘financially traded market value’ business model. In addition, core users of CKAN are governments who have major difficulties directly supporting the project because of procurement rules. Finally, CKAN has growing opportunities outside of the traditional open data portal market that require effort and investment to address.

In summary, CKAN needs substantial investment, classic “developer-only” contribution models limit its value , and the free-rider problem that is always present for open

source is severe. **All of these factors point to the essential need for concentrated leadership to drive CKAN forward.**

To secure the leadership and investment needed for CKAN to remain competitive – and to grow to meet emerging market needs – it needs leadership that is clear, dynamic and invested. That requires commitment and involvement. **We believe that is best served by a) appointing the two lead investors and curators of CKAN over the last 5-10 years to be the stewards for CKAN going forward (Link Digital and Datopian) b) having OKF retain a trustee role to ensure ongoing commitment to the mission.**

These two organizations are Datopian/Viderum + Link Digital. Datopian/Viderum spun out of OKF in 2015 to hold OKF's ongoing services work (started in 2009). It is now controlled by one who was instrumental during the inception phase of CKAN and operates with natural sympathy to OKF principles. OKF remains a large shareholder in Datopian/Viderum. Link Digital have been the longest serving member of the CKAN community other than OKF and have a proven commitment to CKAN and to Open Knowledge.

End-users and other stakeholders will benefit from a clear point of contact within the CKAN project that is responsive. Having a small, highly accountable and identifiable group of stewards is an effective and immediate way to ensure that.

Why are we interested?

- We believe that the potential of CKAN as a solution for data management and data publishing is only beginning to be tapped – we want to see it's full potential realised and that requires vision, interest and commitment to see it happen.

Intentions

We believe the priorities for CKAN as a project are:

1. Current and future users have an excellent open-source product ==> a priority to sustain and develop the product so that it meets the needs of current and future users
2. To provide a return to OKF so that it continue its mission to create an open knowledge economy – and in recognition of its investments and efforts creating and developing CKAN.

And therefore to:

- To ensure adequate investment and leadership of CKAN such that the software and project is sustained and continues to evolve and grow.
- To ensure (where possible) that those benefiting financially from CKAN contribute to the development of an open knowledge economy through contributing to OKF or other local groups (this can include direct contributions or a direct role in causing such contributions).

The Setup

OKF will continue to keep their legal and moral ownership of key CKAN assets such as the trademark, domain (ckan.org) and code but they will move to the role of "trustee" or "purpose steward" with limited day to day involvement.

OKF will appoint Datopian and Link Digital to be responsible for day to day leadership and stewardship of the project on the understanding that:

General Principles

1. **Open Source:** CKAN remain an open source project that is developed "in the open" (i.e. not just code dumps but an open issue tracker, ability to have PRs etc). The Stewards have a general commitment to open source and to do most of their work as open source.
2. **Active involvement:** The "Stewards" are actively involved in setting direction and investing effort to fulfil on that direction.
3. **Open to participation:** The Stewards are open to the contributions from the wider set of CKAN users, developers and vendors in the project.
4. **Joint Decisions:** The Stewards make decisions by agreement between Paul Walsh and Steven De Costa. If there is an area where agreement cannot be reached they can ask Open Knowledge to facilitate, and ultimately to decide. Acceptance of new steward representatives for Link Digital and Datopian are subject to approval from the CEO of OKF.

Contribution back

Link Digital and Datopian, subject to annual review, commit to providing no less than 10% of CKAN related profits as contribution toward OKF's mission.

OKF Supervision

This setup is reviewed and held accountable by OKF. Continuation reviews will be based on a combination of performance and alignment to OKF principles. This will be reviewed by the CEO or their delegate who can escalate to the OKF Board with recommendations for further review, revocation of arrangement or amendment of arrangement. Review checkpoints, we suggest, should be conducted biannually or annually.

Leadership and Responsibility

1. Working **For** the community. The Stewards will remain highly responsive to community needs and will wherever possible foster programs of activity that are designed to meet these needs.
2. Working **With** the community. The Stewards will foster self organised modes of leadership and program activity. For example, in the continuation of the Government Working Group. The Stewards will work with such groups to ensure they are delivering value for CKAN. For example, the Gov Working group would be encouraged to take full responsibility for funding and organising CKANCon's that are attached to IODC, as it is a forum which primarily benefits Open Government Data users.
3. Working to **Build** the community. The Stewards will encourage and incubate communities of interest as they emerge into important areas of CKAN development and use. They will coordinate the natural formation of new working groups, as needed (Smart Cities Data, Research Data, Corporate Data, etc) and establish new accountabilities and commitments for these groups as they mature.
4. **Technical:** the Stewards have responsibility for taking the project forward technically. This includes setting and implementing the technical direction of the project. This will be conducted in continued partnership with the broader community of contributors and existing expert CKAN contributors.
 - a. As partnering stewards we guarantee that resolution of key outstanding issues such as Python 2.7 to Python 3 migration (within the year).
 - b. The Stewards will be responsible for who has commit access to CKAN repositories. However, the current autonomy of the tech team is expected to remain.

5. Technical efforts should aim to serve the needs of both existing and future users and to continue to evolve CKAN in existing and new markets whilst retaining as much backwards compatibility as possible.
 - a. In addition, OKF will have the right to appoint one or more persons associated to OKF to have commit access.
6. **Content and marketing:** the Stewards take on content and marketing leadership and responsibility. They will be responsible for the use and content of the CKAN.org website and twitter account and any other CKAN-related websites or social media. They will have responsibility for organizing, or appointing organisers for, CKAN-related events e.g. CKANCon.
7. **Coordination:** the Stewards will have responsibility for setting up whatever structures, committees or processes they think will promote the goals of the CKAN project.
 - a. Whilst not yet defined and something we would want to consult more on we would anticipate setting up roles for participation by various groups e.g.
 - i. Vendors e.g. as part of a partnership or supporter program.
 - ii. Users (for example governments and other major users) to feedback on needs and deployment and to create connections amongst users.
 - iii. Individual contributors (most contributors it should be noted are funded by either users or vendors).
 - b. Should third parties as governments contribute financial resources we could set up transparent mechanisms for management of their contributions.
 - c. Stewards will favour a distributed model for leadership where possible, creating governance models which put much of the power in the hands of trusted contributors, while retaining authority to intervene as may be needed for the long term benefit of the project.

8. **Funding:** The Stewards will establish funding channels, whether by direct contribution or via coordination of funding programs.
- a. The two parties commit to a combined initial investment of at least \$70,000 USD to provide dedicated resources for the CKAN project. They have these funds to hand and ready to invest.
 - b. The two parties (along with OKF) have already accounted for the majority of investment in the project. In addition, they are the current generators of funding that supports Open Knowledge Ethiopia and technical expertise at OKF. They have significant existing know-how and assets that they are ready to share and/or contribute to CKAN.
 - c. Current negotiations with Canadian Government and other stakeholder jurisdictions remain ongoing to confirm further funding into the project.
 - d. Funding expectations and goals will be set for working groups, in collaboration with the representatives of such groups