



Federal Foreign Office

OPEN DOCUMENT FORMAT

ODF ALLIANCE

# 1st International ODF User Workshop

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## Summary of Presentations & Conclusions

*The views expressed herein may not be regarded as stating an official position of the governments participating in the workshop.*

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## 0 Introduction

The [1<sup>st</sup> International ODF User Workshop](#) was organized by the German Federal Foreign Office in collaboration with the OpenDocument Format Alliance. It took place on October 29-30, 2007 in Berlin and attracted over 50 participants representing 20 governments from around the world that have already made the move to an open standard for document formats, or are actively considering how best to use an open format to preserve access to electronic records and information.

The aim of the workshop was to allow participating government officials to benefit from the real-life ODF migration experiences of national and regional governments and municipalities. Government officials presented at the workshop, with representatives from major ODF-supporting companies and applications available to respond to questions and provide a discussion platform on the benefits, opportunities, and challenges of moving to ODF.

### 1 Welcoming Remarks (*Ulf-Dieter Klemm, Deputy Director General of the Central Services, & Rolf Theodor Schuster, Chief Information Officer, Federal Foreign Office, Germany*)

Ulf-Dieter Klemm, Deputy Director General of the Central Services, welcomed participants on behalf of the German Federal Foreign Office. The fact that government officials from so many countries had gathered in Berlin to discuss ODF, he noted, was a sign of the depth of interest in the issue of open formats worldwide.

Rolf Theodor Schuster, Chief Information Officer, pointed to the message of greeting issued by Federal Minister for Foreign Affairs Dr. Frank-Walter Steinmeier as a demonstration of the importance that his government attaches to the issue of public access to information, and the role that ODF can play in this regard. In the message, Minister Steinmeier said:

*"Modern information technology has turned the world into a village with amazing speed. It links people and builds bridges in a way which even quite recently we would have believed impossible. An open, unhindered exchange of information in all areas of life is of fundamental importance for today's knowledge-based society. It is an important foundation for our shared objective: a peaceful, democratic, pluralistic society. The Open Document Format, as a completely open and ISO-standardized format, is an excellent vehicle for the free exchange of knowledge and information in the globalized age.*

*Rapid, secure, reliable communication plays a crucial role in the work of the Foreign Service. It helps to ensure that we can carry out our task of nurturing and promoting political, cultural and economic relations with our international partners in a pro-active and contemporary manner. I am therefore very happy to welcome the participants in the 1<sup>st</sup> International Open Document Format User Conference here to the Federal Foreign Office.*

*I wish you all an interesting and useful exchange of ideas and every success in your future work."*

### [Message of Greeting from the German Federal Minister for Foreign Affairs](#)

## 2 The Policy Environment

Tom Rabon, Executive Vice President, Corporate Affairs, Red Hat Inc., introduced the session topic and presenters. Rabon quoted Gandhi, who said: “Be the change that you want to see in the world.” Rabon stressed the important role that governments can play as a leader and early adopter. In so doing, he added, their actions can and do exert a strong, positive influence in the information technology arena.

### 2.1 Trends in Europe (*Barbara Held, IDABC, European Commission*)

Dr. Barbara Held, who noted that she was not stating an official position of the European Commission at the workshop, provided an introduction to and overview of the activities of the European Commission's IDABC (Interoperable Delivery of pan-European eGovernment Services to Public Administrations, Businesses and Citizens) program concerning open documents.

Held stated that governments have a natural interest in document standardization, as much of government work revolves around documents. The European Commission, however, does not have a legal mandate to become active in IT issues of administration or eGovernment, as these, in accordance with the subsidiarity principle, are reserved to the Member States of the EU.

The Commission's view on standards is reflected in Directive 98/34 in which only specifications issued by public standardization bodies are standards, and that only such specifications can be referred to in legal texts. ISO standards such as ODF (ISO 26300:2006) are in fact recognized as such, she added. Regarding Office Open XML (DIS29500/OOXML), which is being considered for ISO approval, the Commission had received an oral question (H-0665/07) from the European Parliament on “Irregularities in connection with decision making on international standardization within the ISO.”

Held noted that IDABC published its definition of “open standards” in the “European Interoperability Framework for eGovernment Services v 1.0”. The Commission, however, is supposed to stay neutral in standardization processes, she added, and is in fact not a member of standardization bodies.

Held provided an overview of recent developments. In December 2006, representatives of the Member States in the PEGSCO (Pan-European eGovernment Committee) updated the so-called TAC recommendations calling on European public administrations to, among other things, use international document format standards; use standards that are supported by multiple products; and define functional requirements for open document formats to ensure compatibility between applications.

Recommendations were not only directed to public administrations, she added, but also to industry, which was called on to work together to avoid proliferation of standards; avoid supersets, or subsets; work towards conformance testing to safeguard interoperability; and improve the existing standards where needed (e.g.; electronically-signed documents).

At a workshop organized under the auspices of the German Presidency of the EU in February 2007, there was general dissatisfaction expressed with having competing standards. The view was expressed that public administrations should be able to standardize (internally) on a minimal set of formats; that there be no incomplete implementations or proprietary extensions; that products should support all relevant standards and standards used should be supported by multiple products. In addition, conformance testing and document validation possibilities were needed to facilitate mapping and document conversion and deal effectively with legacy documents, as well as to safeguard accessibility. Held noted that the conclusions of the International eGov Conference of the German Presidency (01/03/2007) reflected the agreement of the Member States that "in the future electronic documents should be exchanged fully on the basis of open document exchange formats."

Concluding her remarks, Held stated that, at the request of the Member States, IDABC was asked to provide a study involving an overview of all activities in the Member States. Deliverables include a comparative study between ODF and OOXML and guidelines for the creation of interoperable documents, including consideration of a tool (an interoperability checker) that would help identify if incompatible features were present that needed to be changed in order to ensure proper conversion.

### **Presentation of Barbara Held, IDABC, European Commission**

#### **2.2 Andalucía's Evolving "Open" Policy Framework (*Juan Conde, Consejería de Innovación, Ciencia y Empresa, Junta de Andalucía, Spain*)**

Juan Conde presented his government's interoperability framework, the objectives of which were to: ensure freedom of software choice; reduce technological barriers; improve security, accessibility and transparency; preserve knowledge; use ICT efficiently (a constitutional mandate); deliver sustainable electronic administration services; and improve public tenders.

Conde noted that the scope of the framework was quite broad and included regional ministries and agencies; companies and public entities with Junta de Andalucía as the main shareholder; universities; and institutions funded by Junta de Andalucía. The legal form of the framework is a decree, with the interoperability framework as an annex, he added. Under the decree, free software is legally mandated "whenever possible" as a guarantee for interoperability, for the preservation of knowledge, and to keep control over the services provided. All software produced by the Junta de Andalucía is FOSS (Orden de 21 de Febrero de 2005). Proprietary protocols and formats are allowed only temporarily, he added. By 31 December 2008, all document interchange should be done using free standards referenced in the framework, which include ODF, PDF, and HTML.

Conde concluded his presentation with a demonstration of WebOffice, which is part of a corporate workflow solution called Trew@. It involves a signed Java applet and launcher for OpenOffice.org with optionally-reduced functionality. It will be extended to support various workflow scenarios and will be published as free software shortly, he added.

### **Presentation of Juan Conde, Junta de Andalucía**

### 3 ODF Migration – Experiences of National Governments

Joachim Werner, Senior Outbound Product Manager EMEA, Novell, introduced the session topic and presenters. Werner noted that each government was different, with some organized along more federal lines, while others had very centralized administrations. As such, the experiences in migrating to ODF were likely to vary.

#### 3.1 Open Standards & ODF In Belgium (*Peter Strickx, Fedict, Belgium*)

Belgium, according to Fedict's CIO, Peter Strickx, is well along the path to implementing ODF in a process that will now enter its third year. Citing the “Highlander” principle (“in the end, there can be only one”) Strickx also expressed the view, for reasons which he would elaborate, that it was not a good idea to have multiple standards for the same purpose.

Strickx began by noting that open IT standards are not goals in themselves, but a means to deliver better services for citizens and businesses and more effective use of the government’s information resources. The decentralized political and administrative structures in Belgium – with federal, regional, communal, provincial and municipal levels of government – posed a special challenge. Solutions, he said, could not be imposed from above. Interoperability between federal agencies and governments (federal, regional, local) could, to be sure, be accomplished through a single vendor, but this he thought would create lock-in and not only reduce choice, but impose choices on others, including citizens. Interoperability via a *de facto* standard, it was concluded, would also create strong dependencies on a market leader. In the end, it was determined that only open standards provided a viable method of achieving interoperability without specific technology mandates. In the process, said Strickx, an open standard would also achieve significant cost reductions when measured by Total Cost of Ownership (purchase+operational+exit cost).

Strickx provided an overview of the ODF adoption process that began in Belgium in June 2004 with the Belgian Interoperability Framework (BELGIF), which required the use of open standards. There followed the June 2006 Belgian Ministerial Council decision in which ODF was chosen as the standard for the reading (by September 2007) and exchange of (by September 2008) of editable documents. Though ODF was chosen, it is not necessarily exclusive. Other standards for document formats are possible, but they must be ISO approved, have multiple implementations (to avoid vendor lock-in), and be compatible with existing standard(s) (i.e.; ODF).

Strickx recommended that governments considering the issue adopt a “bottom up” decision path which involves building consensus and enabling direct action on a small scale. He noted that the decision path in Belgium began in the PICTs (Permanent ICT Steering Group, consisting of the ICT managers of the federal departments), then proceeded to the Chairpersons and eventually to the Council of Ministers.

Given the fact that 95 percent of all government desktops were Windows based, it was decided in Belgium to “build on what you already have” by implementing the ODF through Microsoft plug-ins, OpenOffice.org (or other suites providing native support for ODF), and a

central conversion server. OpenOffice.org was now operating on 10,000 desktops in the Finance department and another 3,000 in Economic Affairs, Strickx noted, and more and more departments were now doing a “double installation” of OpenOffice and MS Office.

Regarding plug-ins, Strickx noted that Fedict had informed both Sun and Microsoft in March 2007 that the quality of their respective plug-ins was insufficient at the time. Fedict urged the respective vendors to improve support for ODF, or risk losing out. In the case of ODF, the impact would be a delay in the implementation dates; in the case of Microsoft, not upgrading to Office 2007. In June 2007 Sun demonstrated the Plug-In v1.0 for MS Office, which Fedict determined to be of sufficient quality to proceed with ODF implementation. Sun Plug-In v1.1 has since become generally available. The latest version of the Microsoft-supported Source Forge-Clever Age translator is expected to undergo testing to determine its adequacy.

Fedict's experience with using Sun Plug-In v1.1, OpenOffice.org 2.x, and a central conversion has been positive, according to Strickx. As a guideline, Fedict could recommend upgrading to Office 2007 if and when there is better ODF support. This is not a mandate, Strickx added, but if you decide to upgrade to Office 2007 you are in effect agreeing there is sufficient support for ODF, and you must have ability to support ODF by the deadlines. Strickx said there was too much focus on the office suite – the format wars are moving to collaborative environments (portals, content management systems, etc), he opined – and ODF support should be required in these types of enterprise applications.

Wrapping up his presentation, Strickx recommended that governments establish interoperability as a goal, using a pragmatic approach focusing on the format, not the product. Start with one format, and give yourself enough time to implement! This is a critical success factor for the project – rushing the process will not lead to success, Strickx concluded.

### **Presentation of Peter Strickx, Fedict, Belgium**

#### **3.2 The Netherlands Open and Connected: An action plan for the use of open standards and open source software in the (semi-) public sector (Sander Ruiter, Ministry of Economic Affairs, The Netherlands)**

Ruiter began his presentation by noting how critical open standards were for interoperability. He said the timing was just right for an action plan on open standards and open source, which was approved by the Dutch cabinet on September 17, 2007, because multiple European policy stakeholders were now engaged, and the IT industry was more mature with regard to open source products.

Ruiter provided background on the action plan, the goals of which were interoperability, vendor independence, competition and innovation. Preconditions for the new policy, added Ruiter, were ensuring reliability and continuity of government without adding additional red tape. The basic requirement regarding open standards, he said, was to “comply-or-explain and commit.” He listed the next steps in the process, which included the development of a basic list of open standards, a directive from the Prime Minister, a framework for interoperability (due January 2008), and a plan for support.

Regarding the policy on open document formats, April 2008 has been established as the target date for 13 ministries to read and save in ODF, with other organizations expected to follow by the end of 2008. ODF was chosen, but like Belgium, it is not exclusive.

### [Presentation of Sander Ruiter, Ministry of Economic Affairs, The Netherlands](#)

#### **3.3 Brazil: Access to Freedom, Freedom to Access (*Deivi Lopes Kuhn, Free Software Strategic Coordinator, SERPRO, Brazil*)**

Kuhn provided background on the Federal Data Processing Service (Serviço Federal de Processamento de Dados, or SERPRO), which is an agency linked to the Brazilian federal government (Finance Ministry) and is the largest public information technology service provider in Brazil and Latin America.

Brazil, according to Kuhn, is promoting widespread adoption of open standards to avoid proprietary lock-in, become vendor independent, and gain greater control over public data. Brazil has become an intense user of free software. Regarding ODF, e-PING, Brazil's interoperability framework for eGovernment, established ODF as the document format officially adopted by the Brazilian government.

Kuhn noted that the Brazilian government's activities in this regard are not limited to the governmental sphere. Other actions and policies that will help grow the IT market in Brazil and provide greater access to IT products and services for citizens include “Computador para todos” (Computer for Everyone), which involves providing a free operating system and office productivity suite that implements ODF; “Digital Inclusion,” which provides public access to free software; and the “UCA project” which involves distributing computers to students.

### [Presentation of Deivi Lopes Kuhn, SERPRO, Brazil](#)

## **4 ODF Migration – Experiences of Government Agencies**

Andreas Pleschek, Manager of Open Client & Linux Software Group, IBM, introduced the session topic and presenters. At last count, there were over 50 government agencies worldwide that have migrated to ODF and ODF-supporting applications. The fact that individual government agencies were in effect piloting and proofing ODF for a possible government-wide migration, noted Pleschek, was a positive development that would help ease the transition.

#### **4.1 Document Format: Open and Free – Guidelines For Implementation (*Justice Yatindra Singh, High Court, Allahabad, India*)**

Justice Singh explained why it is better to adopt a format based on open standards, and also provided guidelines for implementing ODF. Singh began by noting Gandhi's philosophy that “means are more important than the end: it is only with the right means that the desired end

will follow.” In the context of IT, Singh stated that the end is dissemination of information. The means are how to achieve it; how to implement it; what kinds of software to use; and what format to adopt. He stressed that access to information is better with open standards and open formats in particular. These are means that will lead to the desired end, Singh said emphatically. The other advantage in using open source and an open format is “becoming operating-system free.” This, Singh said, is the reason that the Allahabad High Court has adopted open source and open standards.

In implementing ODF, the Allahabad High Court came to several important realizations, according to Singh. People are loathe to change the format that they are already using, and must be brought around into accepting that an open format is better than a closed, proprietary one, or else there will be no successful implementation. He recommended switching to office suites that support an open format natively. In the case of the High Court, he said the choice was OpenOffice.org, which had become the *de facto office* suite for the Indian judiciary. He underscored the need to provide training to ease the transition. He urged that all communications be conducted in an open format, and in case information in any other format is required, provide it, but the original must always be in ODF, he emphasized. He recommended making ODF the default-save option, even though MS word may still be in use.

Finally, regarding open source, open standards, and open formats, he recommended consolidating strong points; using IPR to prevent the hoarding of technology; and inviting all to participate in their development.

### **Presentation of Justice Yatindra Singh, High Court, Allahabad, India)**

#### **4.2 Policy and Work-Flow Integration: Document Conversion & Data Sharing (Hans W. Dahm, Federal Foreign Office, Germany)**

Hans Dahm demonstrated HWD:ODFTrans, a free “metaconverter” which utilizes various existing converters to overcome fidelity issues in individual converters. Dahm stressed that while document converters can accelerate the migration to ODF, document conversion itself was not a “one-time move” but an on-going process that required the development of a migration and co-existence strategy. The exchange of data with people or systems, he noted, occurred both within and outside the organization.

The starting point for HWD:ODFTrans 1.0 was an existing product, email2PDF, which converts a document (whatever format) into PDF. It is email based and involved no additional software on the client side, no need for training or special instruction, and no license fees. Dahm tested HWD:ODFTrans1.0 with the CleverAge Translator (beta), but the results were unsatisfactory. He decided to develop a “metaconverter,” ODFTrans2.0, which utilizes the Microsoft-supported CleverAge Translator, the Sun Plug-In for MS Office, and OpenOffice.org, and is now used on over 10,000 desktops in the German Federal Foreign Office. It is also currently being evaluated by other German government authorities. The use

of ODFTrans 2.0 did not involve an elaborate process, said Dahm: 1) Compose an email; 2) Attach a document to be converted; 3) Send an email to the converter mailbox, specifying the desired output format. ODFTrans2.0 then “polls” the mailbox at regular intervals and if a job is found, it is completed, or an error report is sent back to the user.

The advantages of the process are ease-of-use, no client-side installation, no need to upgrade MS office, and the fact that the MS-based plug-ins can be used for Linux clients. Dahm said the challenges were access restrictions, password-protected and restricted documents, and the waiting time that is sometimes involved with a central converter. While no converter achieves full fidelity, he added, the vast majority of documents were converted correctly with regard to content, with minor issues associated with layout. Dahm then compared the three converters in terms of speed of conversion and size of output. He recommended that with regard to roundtripping, agreement be reached in advance on what formats are allowed. He concluded that HWD:ODFTrans provides users with a quick and easy conversion method which does not involve setting up expensive and inconvenient workstations. A new release with a web interface and support for presentations and spreadsheets is planned.

### **Presentation of Hans W. Dahm, Federal Foreign Office, Germany**

#### **4.3 ODF Templates In A Large-Scale Migration (Martti Karjalainen, Ministry of Justice, Finland)**

Karjalainen provided a primer on the ministry's migration to OpenOffice.org and ODF. The process began in 2005 following the ministry's evaluation of its office software back in 2005, said Karjalainen, after which it was decided to adopt a mixed software suite environment involving 8500 desktops using OpenOffice and 1500 using MS Office, and also to adopt the XML-based ODF.

An OpenOffice pilot project was also conducted in 2006. Areas of special interest involved functionality, compatibility, training requirements, support requirements, and installation and configuration. A cost evaluation was undertaken for the period 2006-2011 which found cost savings of Euro 4.7m (\$7.0m). The return on investment in the project was estimated to exceed 200 percent. The migration has now been completed involving 10,000 workstations. The training was conducted entirely in-house (without the need of external IT service providers) in order to boost in-house skills.

Templates, said Karjalainen, are time-savers and keys to efficiency. They enable uniform document format and content. Tailored templates, he added, ease the migration and decrease the learning curve. He advised participants to be prepared for hundreds or possibly thousands of templates within the organization.

Karjalainen stressed that the default template is the foundation for other templates. He advised participants to provide a uniform ODF default template for all users, and that the

template should be automatic when starting OpenOffice. He recommending creating the default template from scratch. Do not convert, he warned!

Karjalainen then went through, step-by-step, the process of creating a default text template using OpenOffice.org settings; default template assignment in a single-user environment; and large-scale default template assignment on Windows.

Templates accelerate migration and speed user adoption of the ODF-supporting application, concluded Karjalainen.

### **Presentation of Martti Karjalainen, Ministry of Justice, Finland**

#### **4.4 ODF and Open Source Perspectives in the Regional Government of Assam (M.K. Yadava, Assam Electronics Development Corp. – A Government of Assam Undertaking, India)**

Mahendra Kumar Yadava stressed that open document standards must be supported at an official, governmental level because governments are the largest repositories of information and as such run the largest risk of information loss. Governments, he added, also run multiple systems and use multiple formats and are on the front lines when dealing with the legacy issue. He emphasized that considerable cost savings could be achieved on operating systems and suites, savings that could be re-deployed to better hardware and networking capabilities, computer penetration and capacity building in the general public. Yadava expressed the view that the learning curve prevented open source software from becoming ubiquitous, so that it was only a matter of time.

Assam state itself had a population of almost 27 million people, with over 23 million people residing in rural areas. Assam is a leader among Indian states in its embrace of open standards and ODF. It is distributing computers with Linux and OpenOffice.org to students, and government civil servants are using OpenOffice. Under the state's ensuing IT policy, ODF would be now compulsory, according to Yadava, and all IT tenders must mention ODF.

Yadava highlighted the many open-source achievements in Assam, including, among others, a document management system using the OWL open source engine.

### **Presentation of M.K. Yadava, Assam Electronics Development Corp. – A Government of Assam Undertaking, India**

## **5 ODF Deployment – Perspectives from Municipalities**

Following the trend of many national and regional governments, many municipalities are moving to ODF, according to Erwin Tenhumberg, Community Development and Marketing Manager, Sun Microsystems, who introduced the session topic and presenters.

## **5.1 One Year with OpenOffice.org: Munich's experiences in accessing ODF file contents directly (Florian Schießl, Landeshauptstadt München, Germany)**

Schiessl provided a brief introduction to the LiMux project in Munich, which involves migrating 14,000 personal computers and laptops of public employees to free software. LiMux, the name of the Linux distribution being used for the project, is one of the largest, high profile deployments of Linux and OpenOffice.org in the public sector of its kind.

He stressed that ODF implementation was an essential feature of the migration project, and demonstrated an ODF scripting framework that has helped Munich solve problems in a transparent and effective way. Examples included the handling of macros, customizing text modules, dealing with large-sized presentation files with embedded, high-resolution images, and inserting database values by scanning for special placeholders. As a result, Schiessl stated that Munich now had the ability to work with its own documents without dependence on a particular vendor. As for OOXML for scripting purposes, he cited inconsistent, non standard language and color names, and concluded that governments do not need another standard, but competing implementations.

### **[Presentation of Florian Schiessl, Landeshauptstadt München, Germany](#)**

## **5.2 Office Systems Integration & ODF: Reflections from Bristol City Council's experiences since 2005 (Gavin Beckett, Bristol City Council, UK)**

Beckett began by noting that Bristol City Council is the only large public sector body in the UK using ODF. He stated that the move to StarOffice/ODF was based strictly on the business case; namely, saving L 1m. The biggest challenge in moving away from Microsoft's binary formats was due to the fact that most of Bristol City Council's business system suppliers and service delivery partners use Microsoft formats and applications. Bristol therefore needed to convince suppliers and partners to invest in support for ODF. The idea of an open format like ODF is attractive, Beckett emphasized. The challenge is that after decades of Microsoft dominance, the file format is secondary to the application in the UK public sector, where ISVs mainly use macros, VB, batch processing and SQL instead of direct creation of XML-based files.

Positive signs of greater use of open standards are emerging in the UK, according to Beckett. The DCLG's Performance Indicator Exchange pilot is breaking away from closed, proprietary formats; there is increased interest in Bristol's success with StarOffice/ODF; and ODF is becoming more usable as the range of ODF-supporting products grows in such important areas as EDRM and collaboration. However, the dominance of the Microsoft ecosystem in the UK public sector was preventing ODF's wider use, concluded Beckett, who believes that government users need to act in concert, at both policy and practical levels, using their collective weight and providing clear mandates for open standards, backed by their purchasing power.

### **[Presentation of Gavin Beckett, Bristol City Council, UK](#)**

### **5.3 Freiburg's Migration Project (Rüdiger Czieschla & Andreas Kawohl, Freiburg, Germany)**

The use of ODF and PDF is part of the e-government strategy for the City of Freiburg, according to Czieschla, who walked participants through the stages of Freiburg's e-government strategy. The migration of the first department (50 users) is scheduled to be completed in November 2007, and an OpenOffice migration user wiki has been established.

Czieschla regards high-level local political support as essential. In the end, he said, users have not encountered problems, as OpenOffice is not all that different from MS Office.

#### **[Presentation of Rüdiger Czieschla & Andreas Kawohl, Freiburg, Germany](#)**

### **5.4 ODF: A municipal perspective (Horst Braeuner, City of Schwaebisch Hall, Germany)**

Horst Braeuner shared the experiences of a small-city. In Schwaebisch Hall, sx\* is currently the internal format for document exchange, but ODF will be in 2008 when the rollout of OpenOffice.org 2.X is completed. Plans are underway to make ODF the exchange format with local businesses and citizens as well. The city will move to ODF because it is a "crash resistant," according to Braeuner, and accessible over the long-term, providing all the advantages of an xml-based format. Braeuner also likes the added assurance of having access to the format instead of it being under the control of a vendor. The migration to a Linux desktop will be 98% complete by January 2008, he added.

Braeuner emphasized the need for ODF to become more widely used, and for this to happen, ODF supporters needed to raise awareness of the format through greater marketing activities. For governments, he recommended that they display greater courage and simply come out and do what they know is right.

#### **[Presentation of Horst Braeuner, City of Schwaebisch Hall, Germany](#)**

## **6 ODF & Interoperability**

Zaheda Bhorat, Open Source Manager, Google, Inc., introduced the session topic and presenters.

### **6.1 South Africa's Interoperability Framework (Aslam Raffee, Dept. of Science & Technology, South Africa)**

Aslam Raffee provided a brief overview of South Africa's open source and open standards policies, including the recent government decision requiring the use of ODF.

The South African government's FOSS policy has five key points:

Choose FOSS - The South African Government will implement FOSS unless proprietary software is demonstrated to be significantly superior.

Migrate to FOSS - The South African Government will migrate current proprietary software to FOSS whenever comparable software exists.

Develop in FOSS - All new software developed for or by the South African Government will be based on open standards, adherent to FOSS principles, and licensed using a FOSS license where possible.

Use FOSS/Open Content Licensing – The South African Government will ensure all Government content and content developed using Government resources is made Open Content, unless analysis on specific content shows that proprietary licensing or confidentiality is substantially beneficial.

Promote FOSS in South Africa – The South African Government will encourage the use of Open Content and Open Standards within South Africa.

Against this backdrop, Raffee highlighted the 22 October 2007 decision, signed by South Africa's Minister of Public Service and Administration, Ms. Geraldine Fraser-Moleketi, which requires the use of ODF for exchange of data and information between government agencies and with citizens and other external entities. E-gov, said Raffee, requires the seamless flow of information across all tiers of government. The Minimum Interoperability Standards V4.1 (MIOS V4.1), which now references ODF, comprises the technical principles and standards required to achieve this interoperability.

Raffee then outlined the criteria that a standard must meet before it can be considered “open” under the South African government's policies, emphasizing that for any format to be considered “open” under MIOS, it must meet all of them:

- It should be maintained by a non-commercial organization.

- Participation in the ongoing development work is based on decision-making processes that are open to all interested parties.

- Open access: all may access committee documents, drafts and completed standards free of cost or for a negligible fee.

- It must be possible for everyone to copy, distribute and use the standard free of cost. The intellectual rights required to implement the standard (e.g. essential patent claims) are irrevocably available, without any royalties attached.

- There are no reservations regarding reuse of the standard.

- There are multiple implementations of the standard

Raffee wrapped up his remarks by highlighting some of the challenges that lie ahead,

including the development of ODF-supporting tools, including translators, digital signatures, and the need to achieve more widespread usage of ODF.

### **Presentation of Aslam Raffee, Dept. of Science & Technology, South Africa**

#### **6.2 Health Record Archive In ODF (*Prof. He Yusheng, EHR Standards Steering Committee, Ministry of Health, China*)**

Professor He provided a snapshot of the current state-of-play regarding the archiving of health records in China and discussed the current and future use of ODF for this purpose.

Though most health records in China exist in paper form, over 27% are electronic, with most data entry on a plain text template. Chinese character entry is also problematic for doctors. Technical fixes to these challenges include an XML-based document with both structured and unstructured content, a user-defined template, and a table with multi choice elements.

For structured medical records, Prof. He highlighted the features (redefined category/fields, vocabularies/terms) and advantages in terms of ease of operation (inputting and updating data) and computing (statistics, real time processing). The unstructured medical record, on the other hand, involved use of the natural language and knowledge of the doctor from which knowledge could be extracted only via human reading. He described the improvement of natural language processing in progress that would convert some unstructured information into structured information.

Prof. He demonstrated the use of ODF for health records archiving. The records created, which would keep structured and unstructured medical information and expense information in one place as on paper, are stored in an XML database for general research. He described ODF integration with Xforms, a new generation of web forms developed by W3C, as a natural fit. He described the future of health care records with ODF from the perspective of health-care practitioners (doctors, nurses, etc.), government, insurance and other related parties, and the patient.

He concluded his remarks with some of the opportunities and challenges of working with ODF in the medical records arena, including the interaction of ODF with medical message standards (HL7, CDA), the need for a specialized reader for writing and viewing health record archives, and data mining over collections of ODF documents. He underscored the critical role that open standards play for longitudinal health studies and demographic research by enabling greater flexibility, interoperability, access, cost savings, and avoidance of vendor lock-in, while maximizing choice.

### **Presentation of Prof. He Yusheng, EHR Standards Steering Committee, Ministry of Health, China**

### **6.3 ODF & European Interoperability (*Graham Taylor*, Chief Executive, Open Forum Europe)**

Taylor summarized the main recommendations that emerged from the Lisbon Ministerial eGovernment Conference on 19-21st September 2007, in which Ministers called on the European Commission to "...propose a revised version of the European Interoperability Framework to foster the development of interoperable European eGovernment services.....". He recalled the European Interoperability Framework Version 1.0 (EIF v1.0), which was released in November 2004, had achieved global recognition and had in fact been emulated in many national interoperability frameworks. The focus of EIF v1.0 was on technical interoperability, Taylor noted, and it included both a definition of an "open standard" (independence of organization, published freely, royalty free, no constraints on reuse) and support for open-source software.

EIF v 2.0 is scheduled to be published Spring 2008, Taylor added. In the meantime, the European Commission asked Gartner to make a report on EIF that Gartner delivered in May 2007, which will serve as one of many inputs for the final revision. In his remarks at the Lisbon Ministerial, Taylor was critical of the Gartner Report, citing its failure to build on EIF v1.0. At the ministerial, Taylor emphasized that open standards are fundamental now, not just in the future, and that there should be no watering down of definitions and commitments. Multiple standards were not wanted and not sustainable, Taylor posited, and he recommended that the EIF move from advice to practice. He stressed that the avoidance of lock-in involves more than just standards, but is as important as interoperability.

Taylor said that 90% of the public sector has lost the opportunity to freely choose the next IT solution. He stressed the importance of substitutability as well as interoperability. Openness is the goal, he concluded, and openness needed to be measured with appropriate tools. In this regard, he cited Certified Open®, which is now available for free trial.

#### **Presentation of Graham Taylor, Open Forum Europe**

### **6.4 ODF Learns Arabic and Armenian (*Salah Helal*, German Embassy Cairo & *Susanne Kühnel*, Federal Foreign Office, Germany)**

### **7 ODF Support in the Application Ecosystem (*Peter Lord*, Director, TechnologyPolicy,Oracle)**

Peter Lord began the final session by posing several questions to stimulate discussion on use of ODF in novel ways outside of office productivity suites. Specifically, he asked:

- What elements of a document workflow process could support ODF and thereby accelerate adoption and migration efforts?
- How would support of ODF within different types of software applications help provide

innovative solutions to citizens or government employees?

- What kinds of operations would participants like to perform on collections of ODF documents to take advantage of its unique open and XML-based qualities?
- Are there development tools or other utilities where native support of ODF is necessary or useful?
- With open and complete document format access, what kinds of new services could you offer to citizens? (For example, single-window services such as creating on-the-fly custom forms for multiple purposes - motor vehicle registration, parking permits, etc.)

Participants raised several needs regarding ODF support in the application ecosystem. They included the development of basic skills to assure that the people supporting the systems in government are plugged into the OpenOffice and ODF communities to ensure that any updates or changes are incorporated back into the base product. This includes both bug fixes and feature requests. Participants also expressed the need to stimulate local IT development and support opportunities.

Regarding specific tools, participants expressed a desire for independence from particular office suites. For this to happen, user interfaces should be available and clearly defined for interoperability with other systems. Interest was also expressed for developer libraries that implement the entire ODF specification (e.g., perl module).

It was noted that several existing resources might address some of these needs. The ODF toolkit project, for example, is available at OpenOffice.org, implemented in Java and .NET, and allows for the possibility of generating extensions to office suites. The [OpenOffice.org Solutions wiki page](#) is also a useful resource for people looking for new solutions to meet requirements.

Several ODF enhancements were discussed including metadata support in ODF v1.2 which will provide flexible fields to create unique metadata for specific user needs/requirements; digital signatures, in which there is a strong interest in government and for which standards are needed; and template generation. It was noted that fonts needed to be consistent across platforms and applications. Bulk document updating to deal with language coding issues was also cited as an immediate challenge to governments who deal with multiple languages and scripts (e.g., Armenian case).

Interest was also expressed in ODF content management and collaboration; in particular, how to collaborate on a document (e.g., undo list) over the web; document versioning (change tracking). Interest was expressed in portal/collaboration software as an alternative to Sharepoint. Regarding workflow, it was noted that open-source workflow tools are emerging to support ODF.

Other ideas, opportunities, challenges discussed included: 1) Automated solutions for data entry and forms generation, with ODF as a possible “killer” standard to enable a host of new applications to enhance user productivity; 2) The strong synergy between XForms and ODF standards in terms of offering new capabilities – e.g, mash-ups, composite applications; 3)

VBA process lock-in and the opportunity to move to an SOA-based framework by moving to ODF; 4) The “power user” challenge (What is specific to MS Office that so-called power users need? Are they specific features or hooks to other software; and the spreadsheet application as the interface to various external/enterprise applications – for example GIS, financial reporting, etc.

## **8 Workshop Summary & Conclusions (Marino Marcich, Managing Director, ODF Alliance)**

Marino Marcich thanked the host, the German Federal Foreign Office, for its hospitality and Rolf Schuster for providing the vision, impetus, and energy that were essential to making the event a success. The fact that officials representing 20 governments had gathered on such short notice in Berlin was remarkable in itself, he added, a sign of the growing momentum and support for ODF in the public sector. Marcich noted that the theme of the workshop was moving from policy to actual deployment of ODF. Participants were able to benefit from the real-life migration experiences of governments - large and small - Marcich concluded.

Participants expressed a strong desire to develop and maintain a government community of users, and that the workshop served as an excellent starting point for such a community which would involve the development of a repository of information about adoption and migration experiences. Strong interest was expressed in holding another workshop in the near future.