An aerial photograph of a rugged, rocky landscape with numerous hot air balloons floating in the sky. The balloons are in various colors and patterns, including red and white, yellow, blue and white, and multi-colored. The terrain is characterized by deep, winding valleys and high, rocky ridges, typical of a volcanic region like Cappadocia.

The Role of Open Source in Germany - Results of the Open Source Monitor 2021

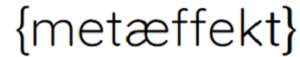
17.05.2022

Dr. Frank Termer

bitkom

Bitkom Open Source Software Monitor 2021

With the kind support of

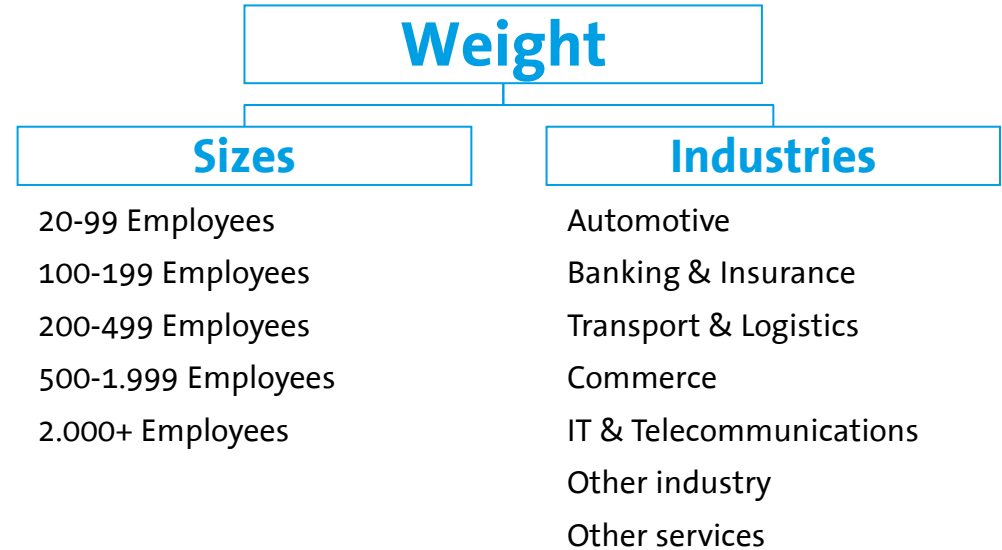


Research Design

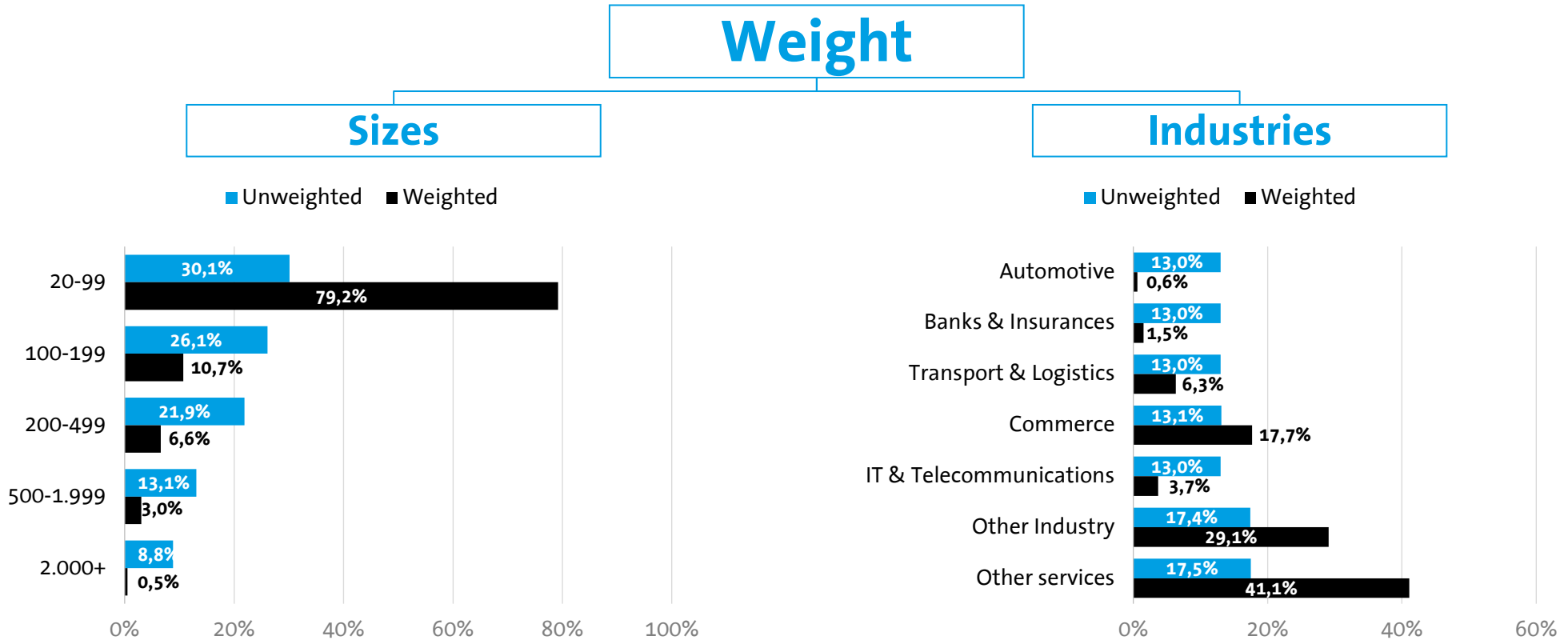
	Economy	Public administration
Population & Sample	Companies with more than 20 employees in Germany (n=1,152)	Organisations with more than 20 employees in Germany (n=100)
Competitions	Disproportionately layered random sample	
Target group	Responsible for the topic of open source software in the company / organization, alternatively: responsible for the topic of software use or software development	
Survey period	24.05. to 23.07.2021	21.06. to 30.07.2021
Methodology	Computer-aided, oral, telephone survey (CATI)	Computer-aided, oral, telephone survey (CATI)
Weight	The respondents' statements were weighted so that the results give a representative picture of companies with 20 or more employees (in the respective sector) by industry and size classes..	no weighting
Statistical fault tolerance	+/- 3 Percentage points	

Sample and representativeness: Economy

- By **stratifying the random sample**, it was ensured that companies from the different industries and size classes are represented in sufficient numbers for statistical evaluations.
- The respondents' statements were **weighted** so that the results give a **representative** picture for all companies in Germany with 20 or more employees according to industry groups and size classes.
- As a result, the assessments of **smaller companies** are given comparatively **high weight** in the overall results due to their high share of the total number of enterprises.



Sample and representativeness: Economy



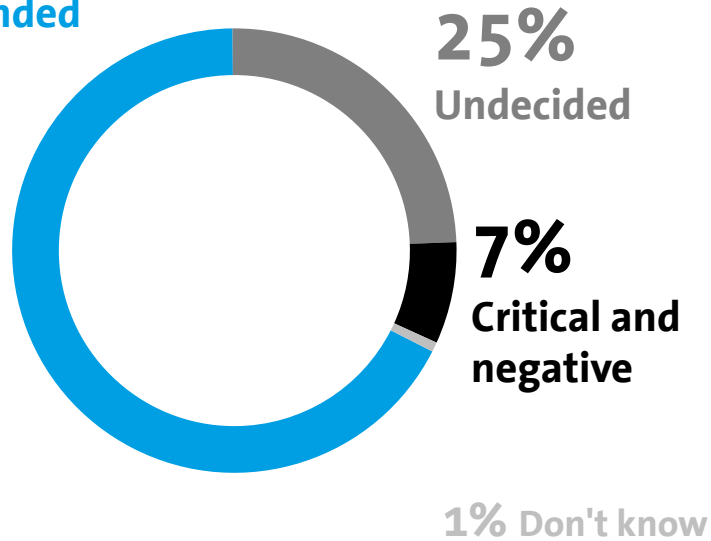
Attitude to OSS

Attitude towards OSS – 20+ employees in total

How does your company generally feel about OSS?

67%

Interested and open-minded

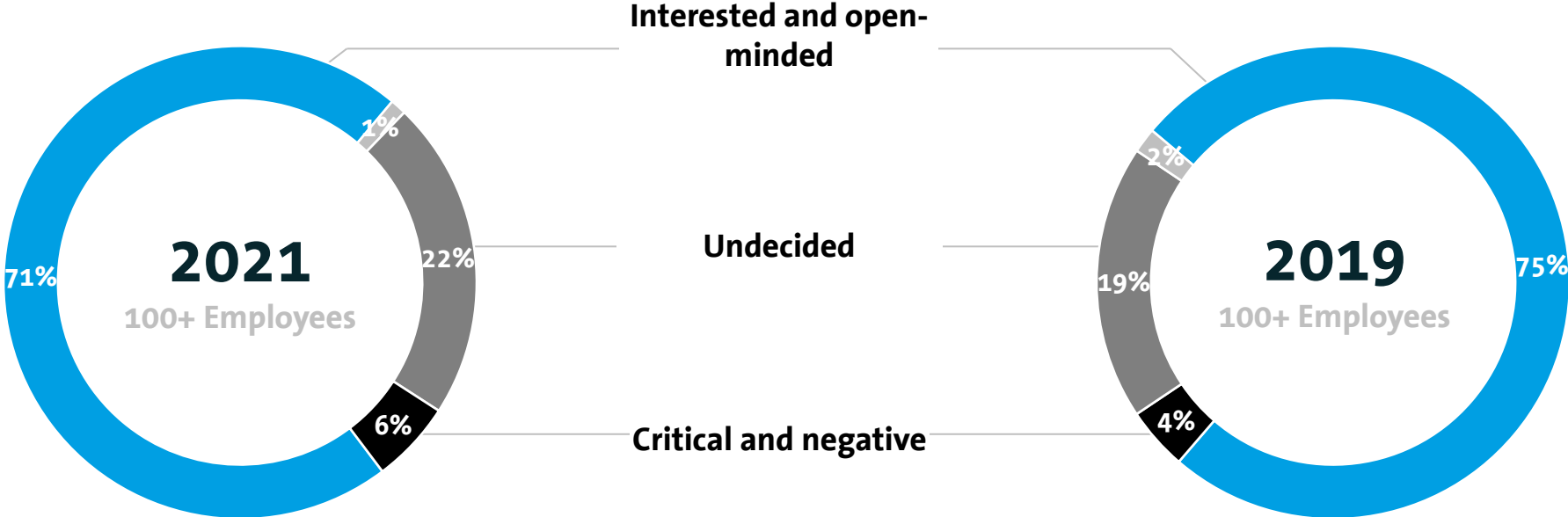


"By open source software we mean software, such as program modules, programming tools or libraries, whose source codes are disclosed and whose license allows the licensee to freely execute the software, analyze it, adapt it to one's own needs and pass it on in both unchanged and modified form. In addition to the openly accessible source code, this also requires freedom from license fees."

In the following we only use the abbreviation OSS for Open Source Software.

Attitude towards OSS – 100+ employees year-on-year

How does your company generally feel about OSS?



8 Base left: All companies with 100 or more employees (2021: n=805) | Base right: All companies with 100 or more employees (2019: n=804) | Source: Bitkom Research

Advantages OSS – 20+ employees in total

From your point of view, what is the biggest advantage that speaks for the use of OSS in your company?

Cost

Cost savings 24%

Openness

Access to source code 14%

Simple change of provider 8%

Easy adaptation to own needs 5%

Wide choice of OSS components 5%

Better compatibility between tools and components 4%

Open standards and interoperability 3%

Large number of OSS providers with commercial support 2%

41%

IT Security

High security through timely updates 7%

High stability, low susceptibility to errors 2%

9%

Cooperation & Innovation

Broad and active community for knowledge exchange 4%

Better competitive opportunities 3%

Promotion of innovations 1%

8%

Image

Good reputation of OSS 1%

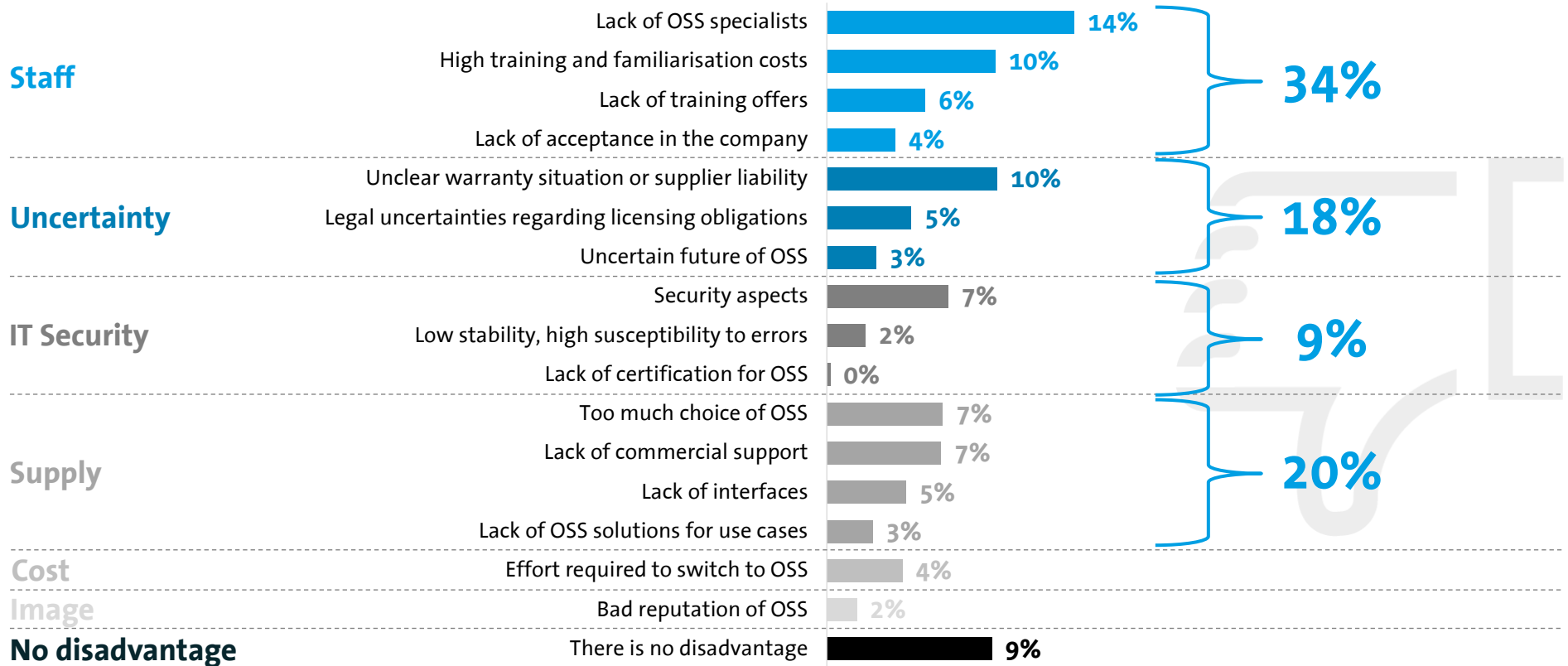
Attractive IT workplace, motivation for employees 0%

No advantage

There is no advantage 14%

Disadvantages OSS – 20+ employees in total

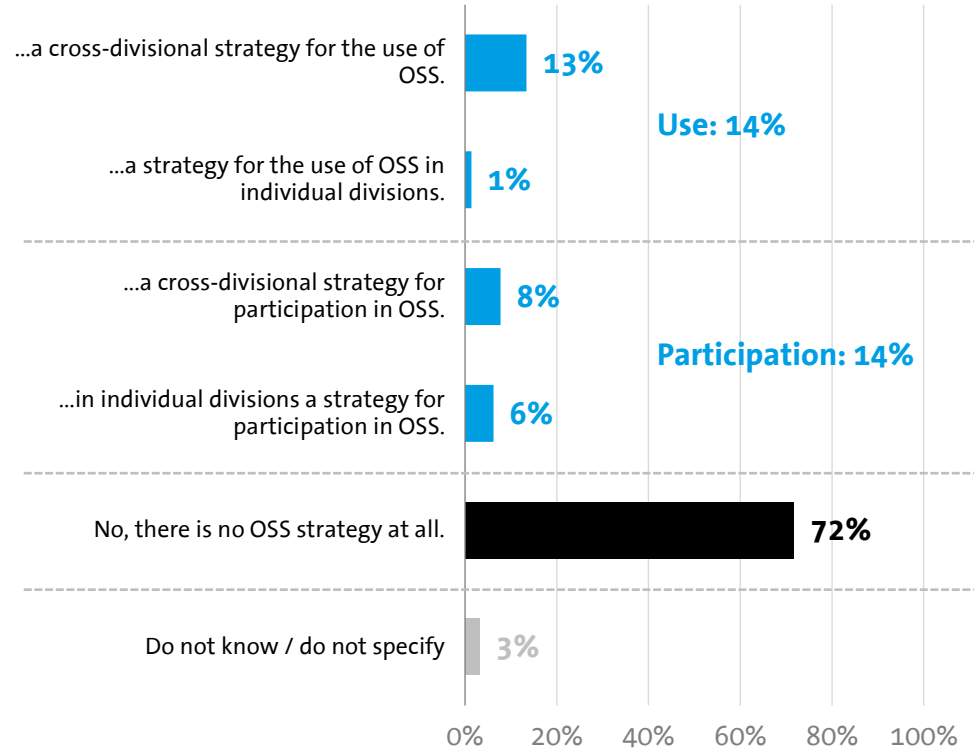
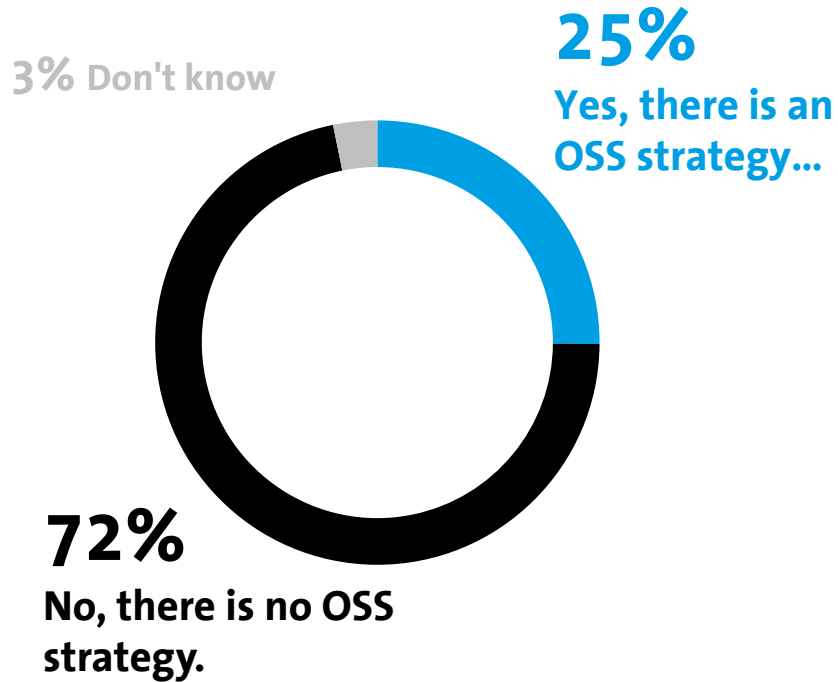
From your point of view, what is the biggest disadvantage that speaks against the use of OSS in your company?



OSS Strategy

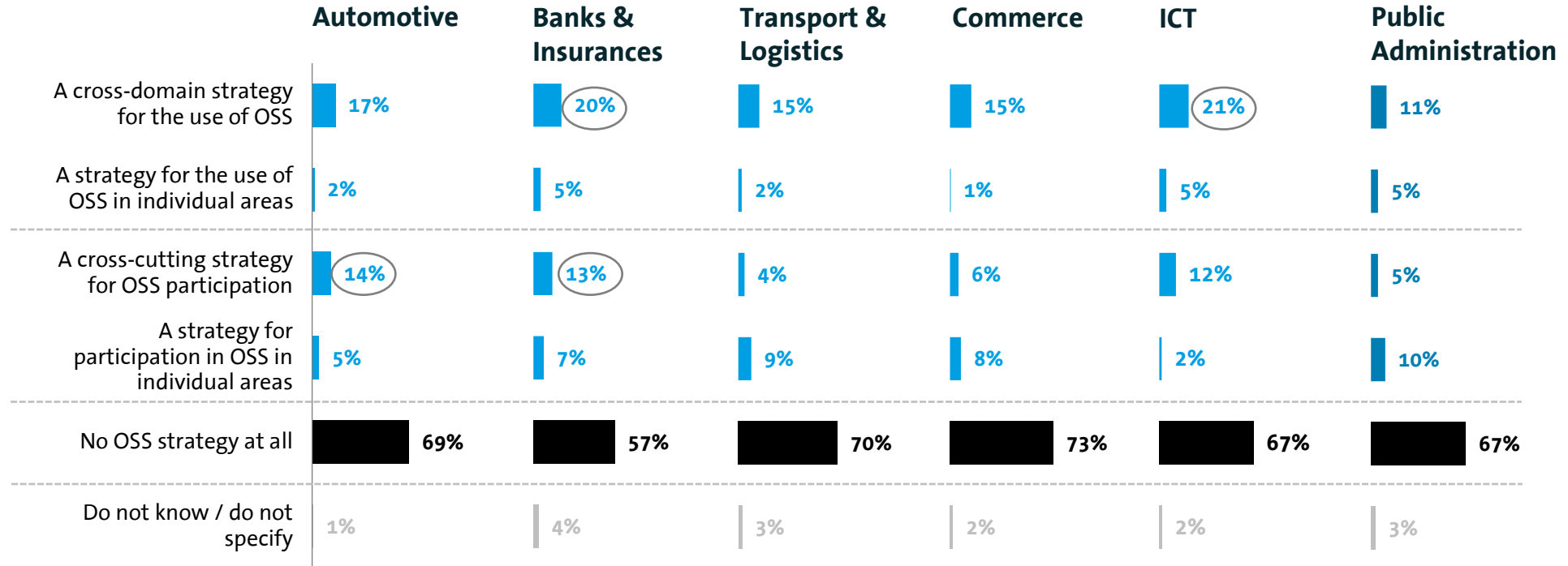
OSS strategy – 20+ employees in total

Does your company have a strategy for using or participating in OSS?



OSS Strategy – 20+ Employees Industries

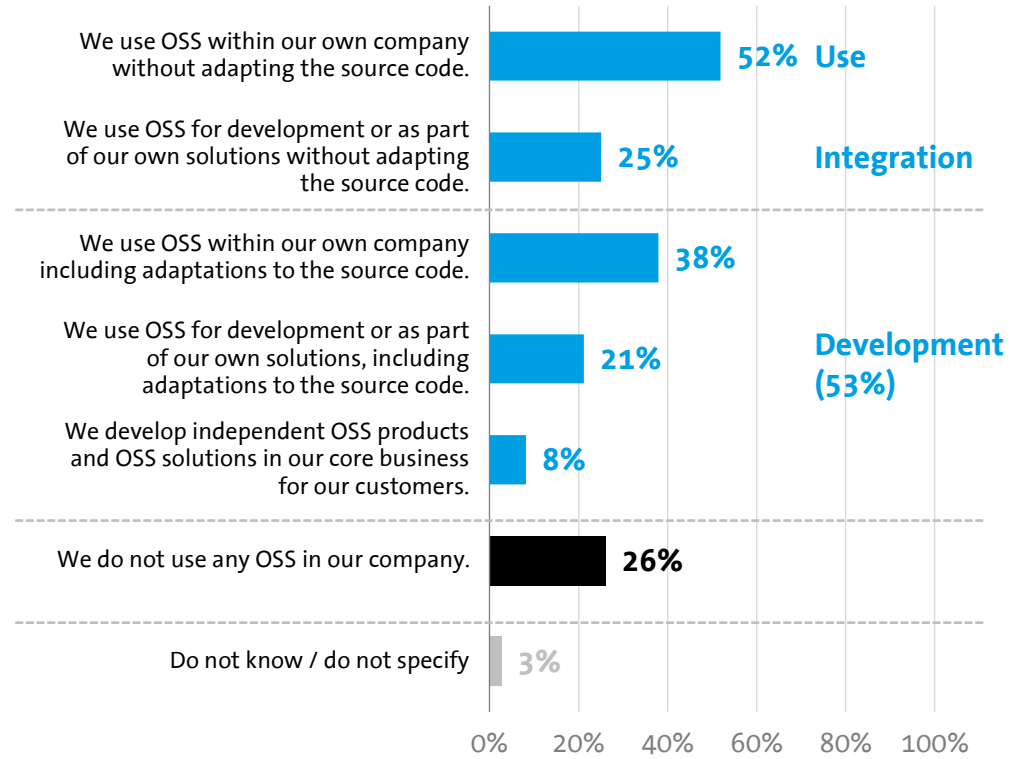
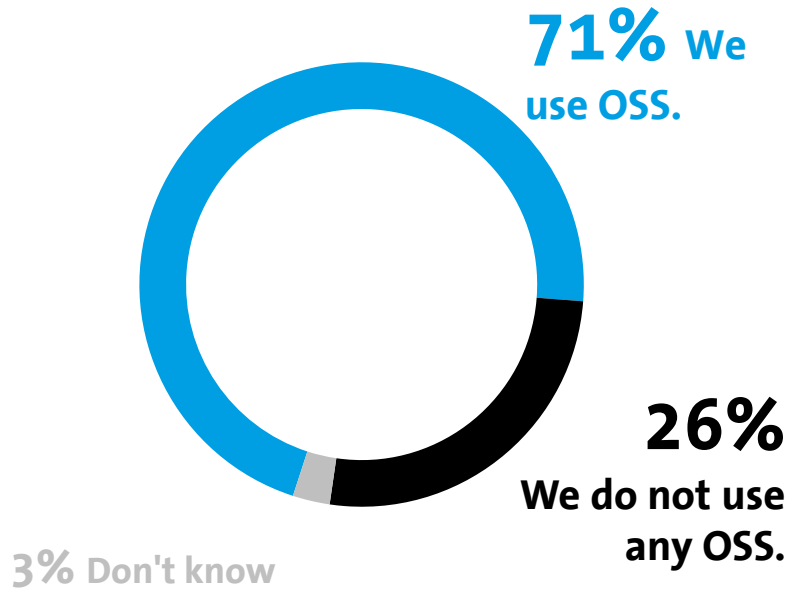
Is there a strategy in your company / organization for using or participating in OSS?



OSS Use

OSS Use – 20+ employees in total

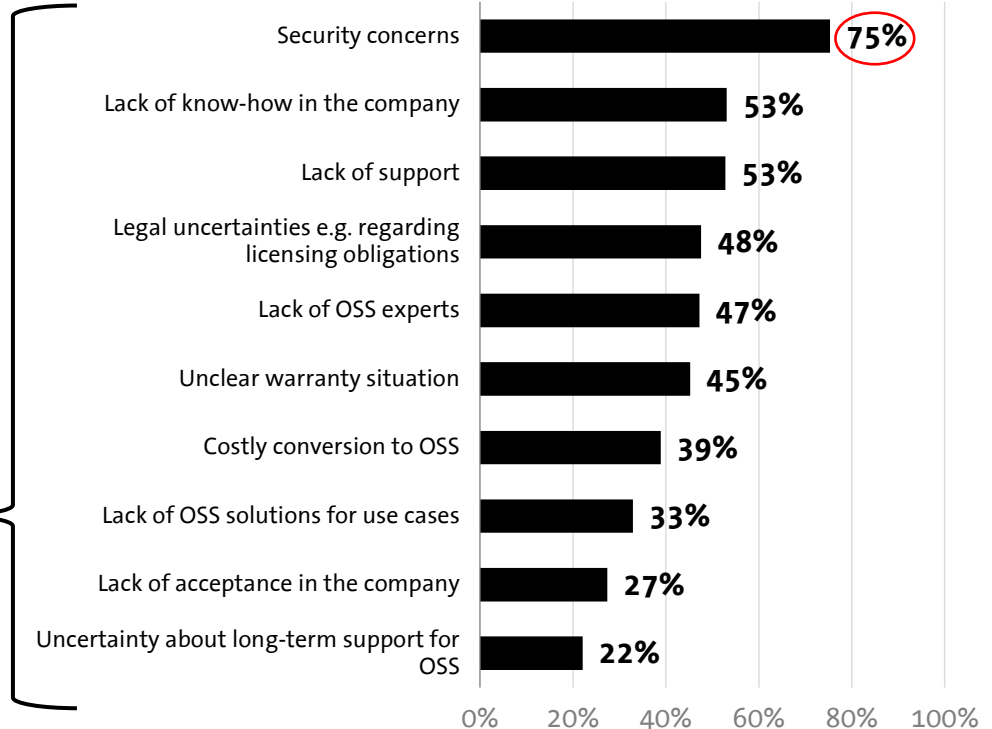
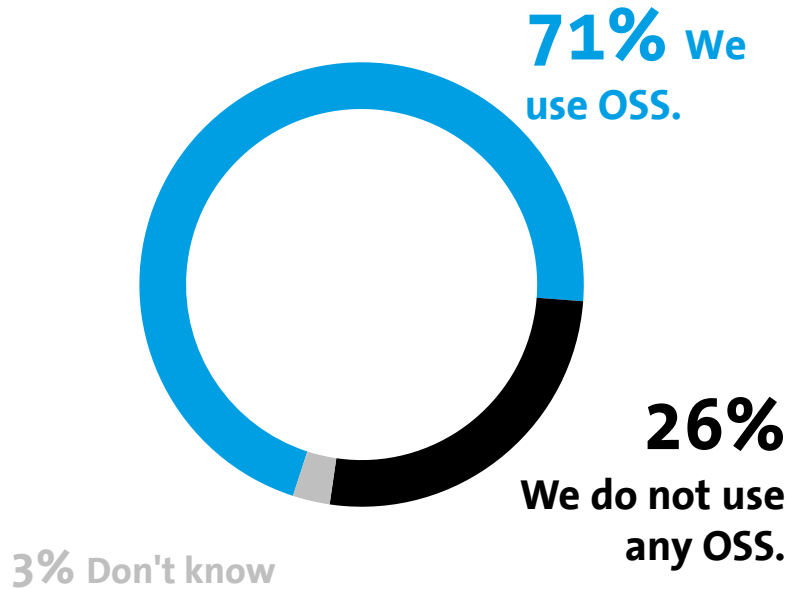
Which of the following statements apply to the use of OSS in your company?



Obstacles OSS use – 20+ employees in total

Which of the following statements apply to the use of OSS in your company?

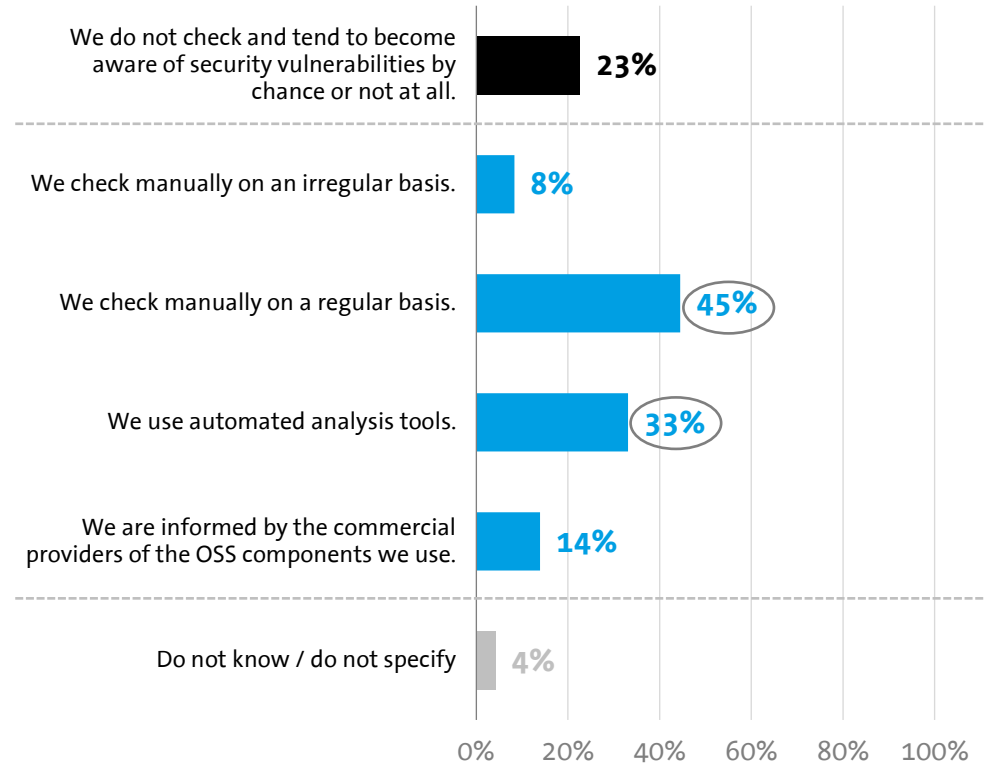
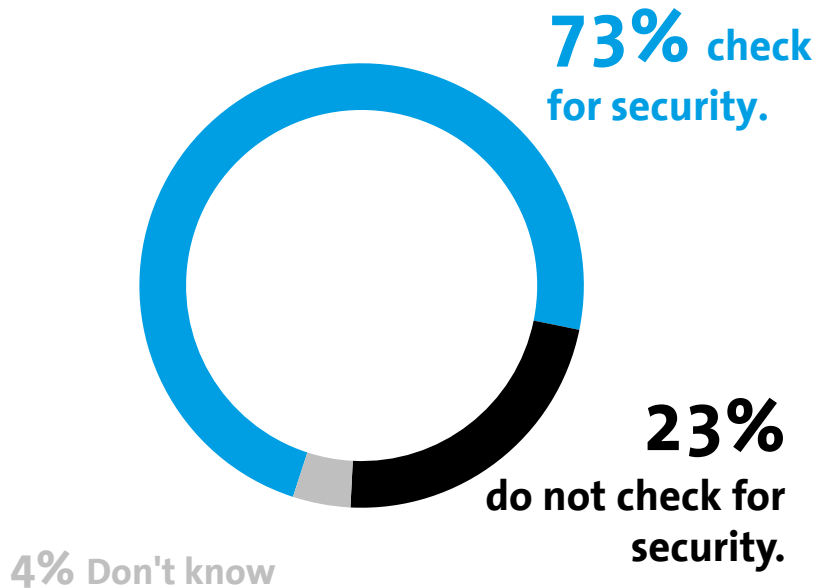
For what reasons do you not use any OSS in your company??



OSS Application – Security Check

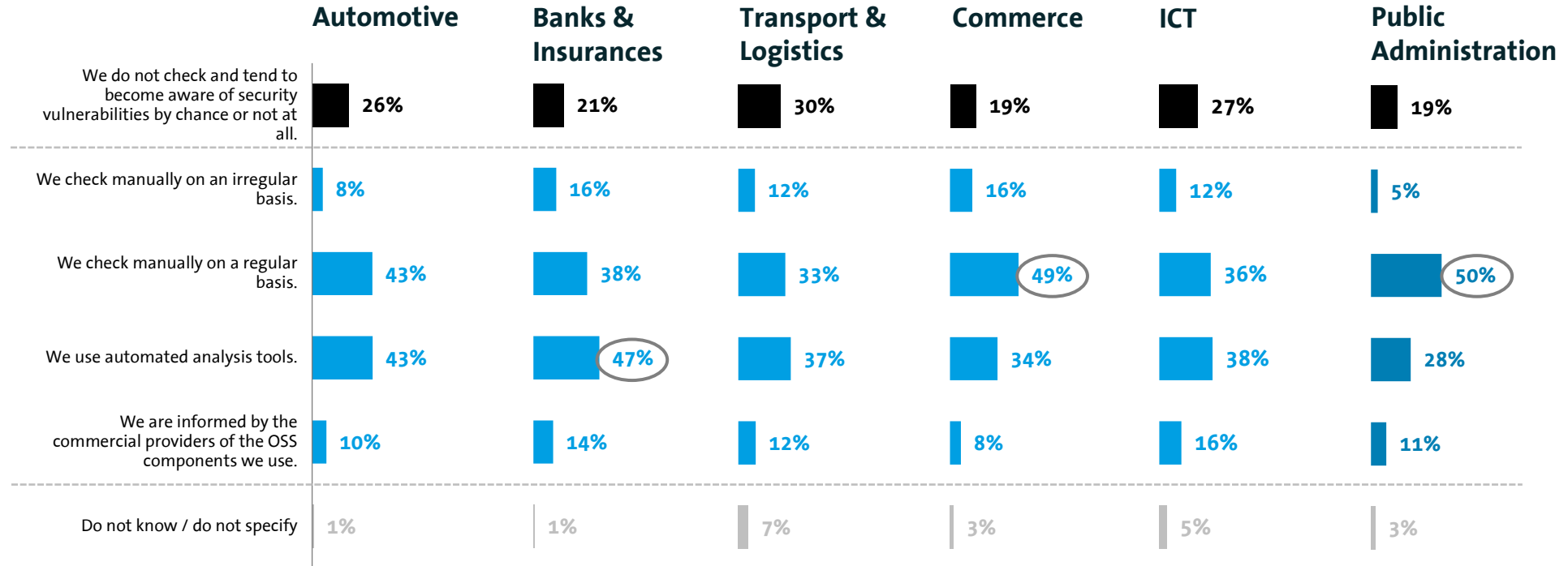
Security check OSS – 20+ employees in total

What approach do you take in your company when testing for the security of the OSS components you use?



Security audit OSS – 20+ employees industries

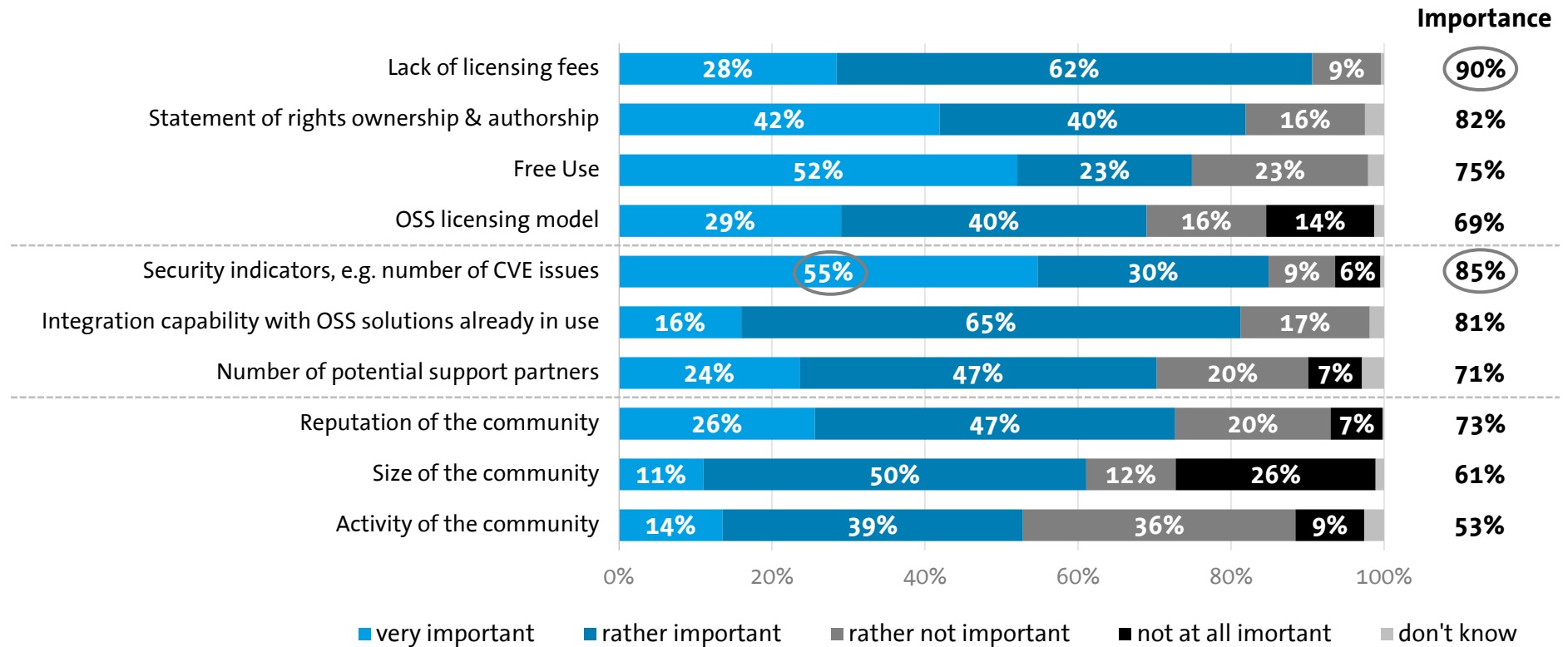
What approach do you follow in your company / organization when checking for the security of the OSS components you use?



OSS Application – Selection Criteria

Selection of OSS projects – 20+ employees in total

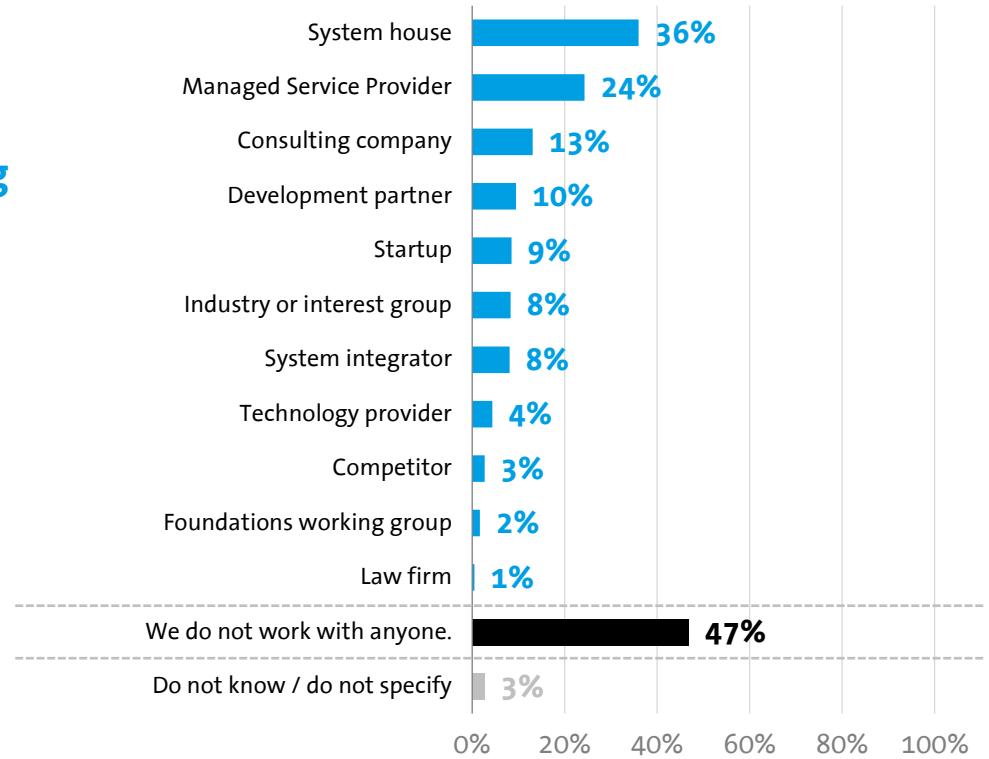
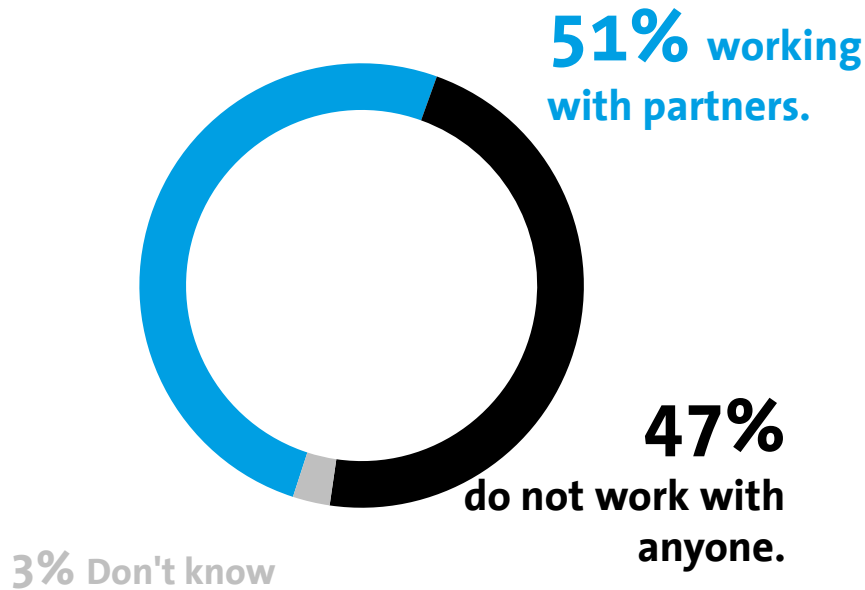
How important are the following criteria when selecting OSS projects in your company?



OSS Deployment – Collaboration

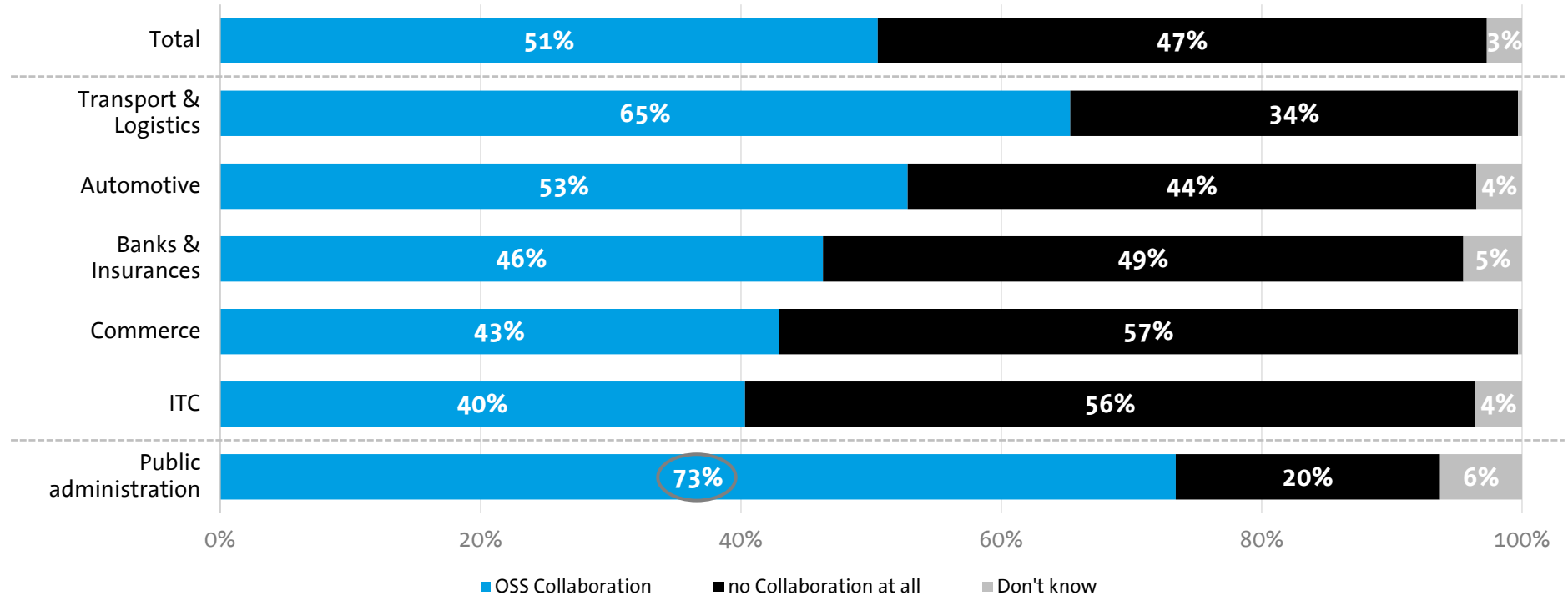
Collaboration OSS deployment – 20+ employees in total

With which of the following partners does your company work conceptually and / or implementing within the framework of OSS?



Collaboration OSS deployment – 20+ employees industries!

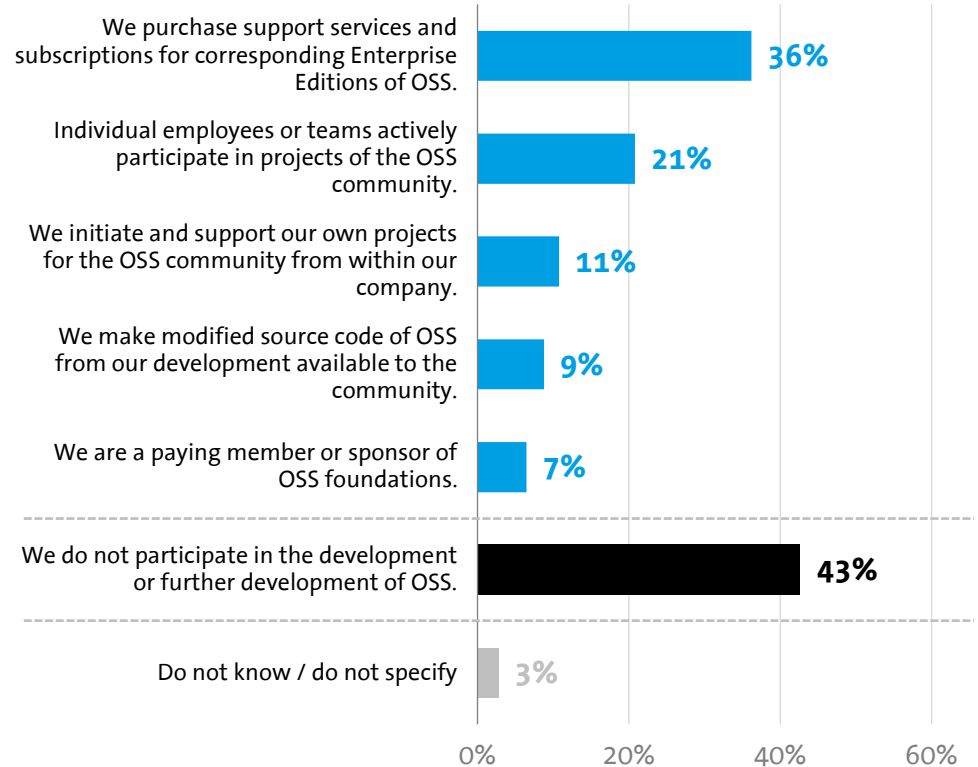
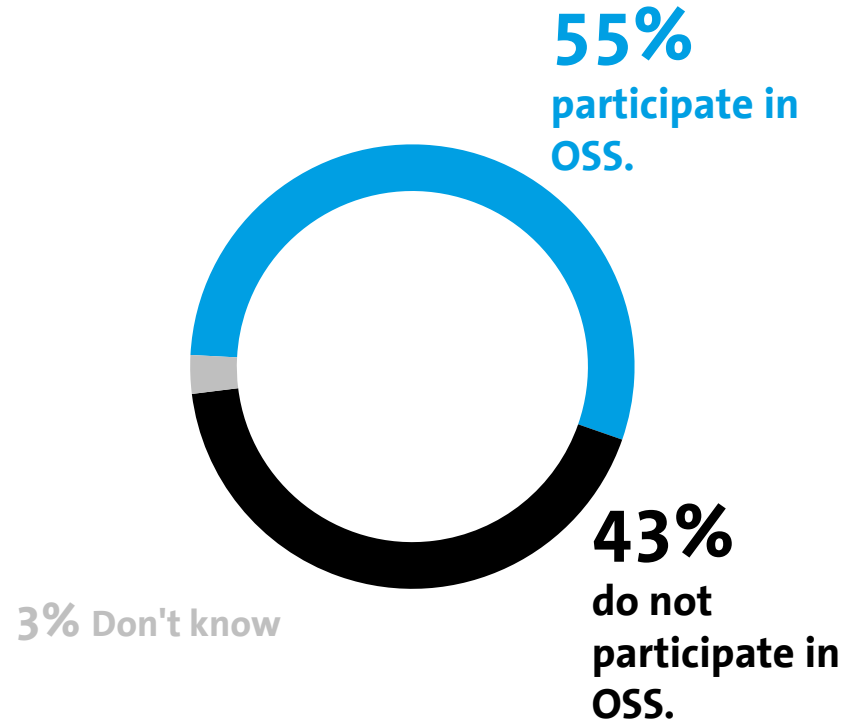
With which of the following partners does your company / organization work together conceptually and / or implementing within the framework of OSS?



OSS Participation

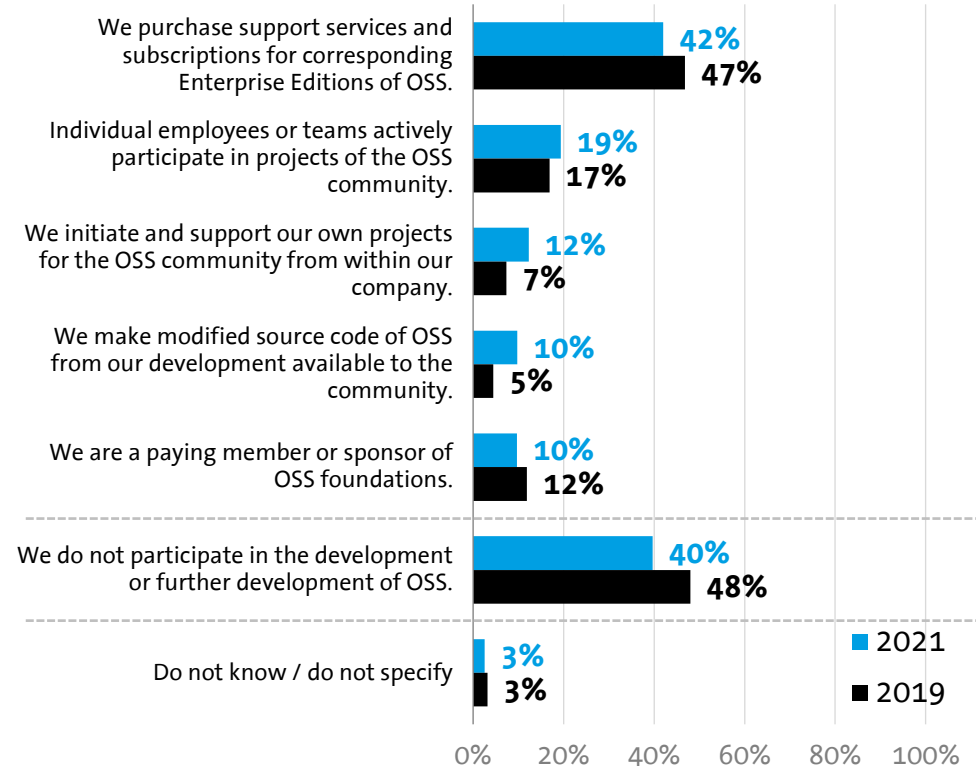
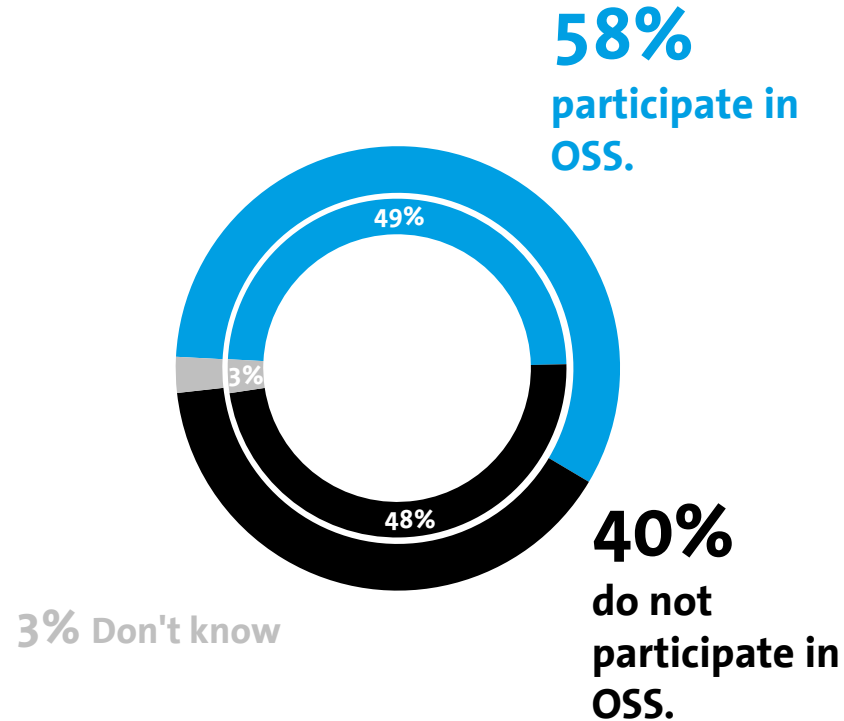
Participation OSS – 20+ employees in total

To what extent does your company participate in the development or further development of OSS?



Participation OSS – year-on-year comparison 100+ employees total

To what extent does your company participate in the development or further development of OSS?

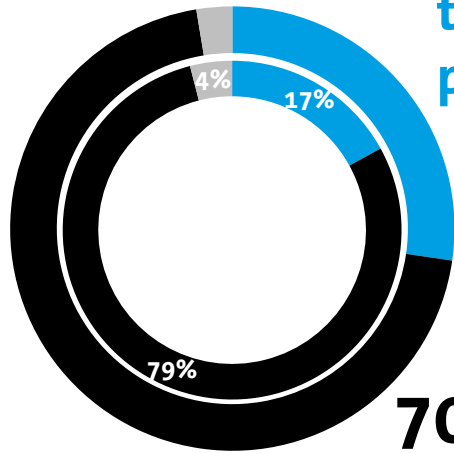


OSS Compliance – OSS-Policy

OSS Policy – Year-on-year comparison 100+ employees total

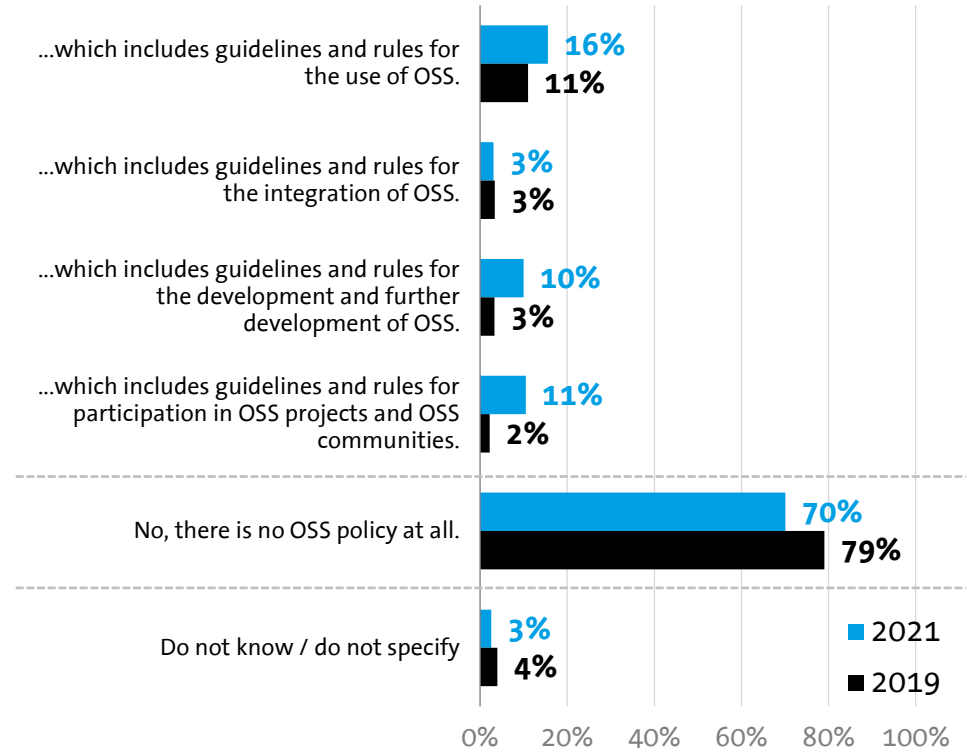
Does your company have an OSS policy, i.e. a document in which guidelines and rules for dealing with OSS in your company are written down?

3% Don't know



**27% Yes,
there is a
policy...**

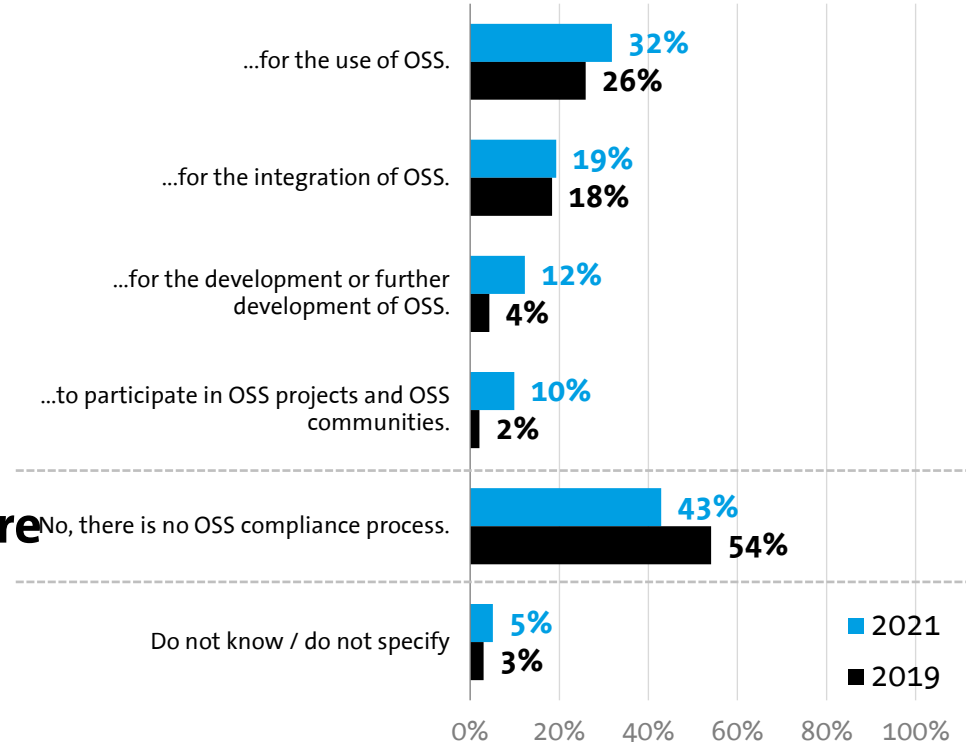
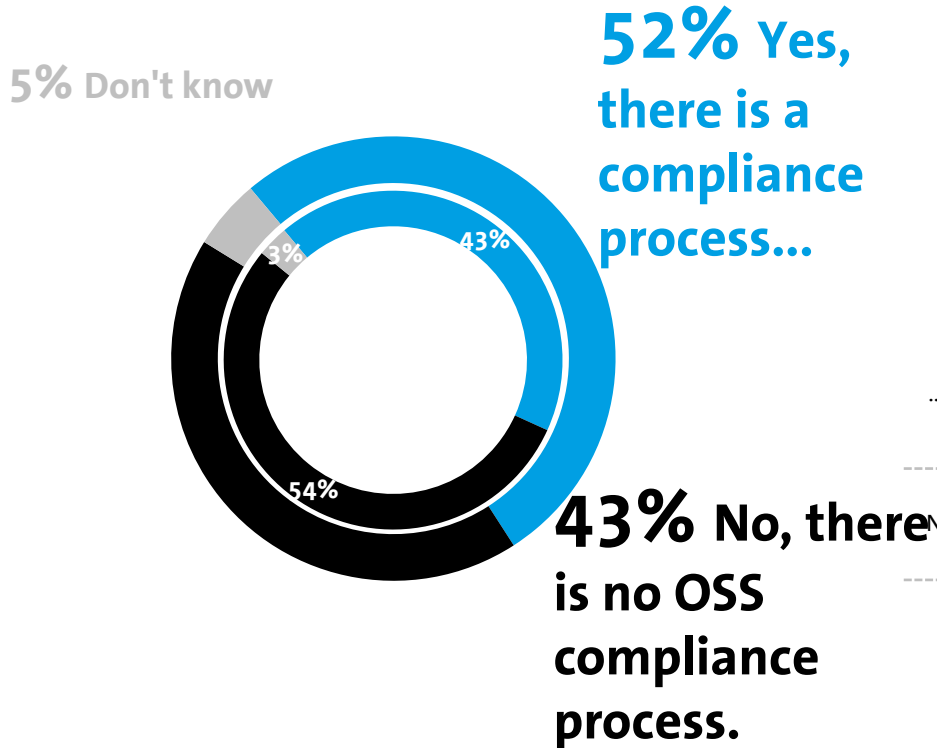
**70% No,
there is no
policy at all.**



OSS Compliance – Compliance Process

OSS Compliance Process – Year-on-year comparison 100+ employees total

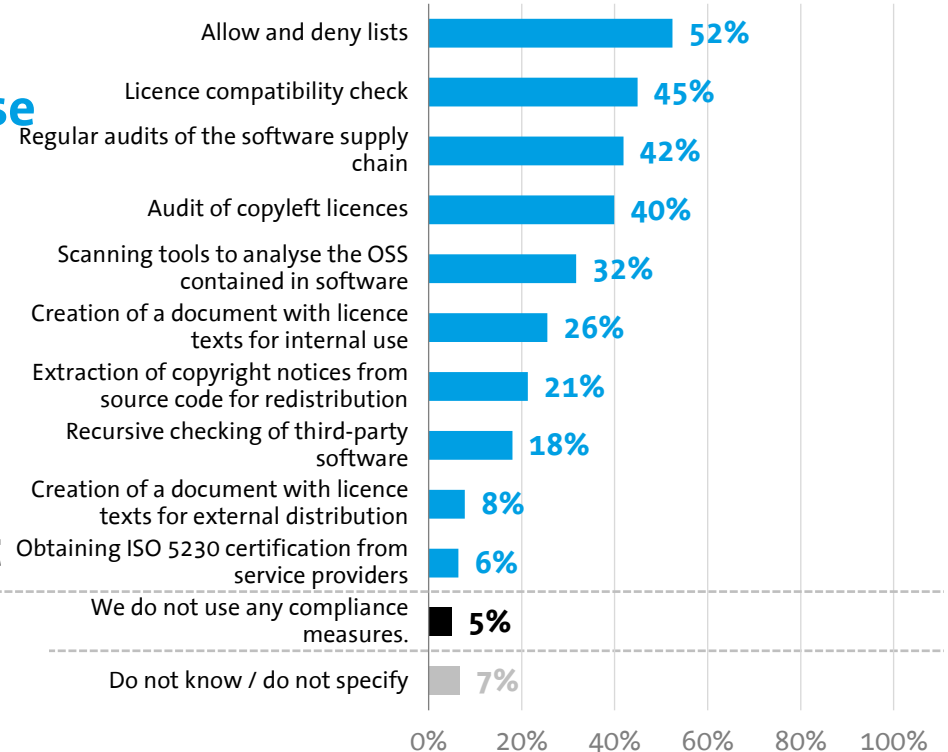
Does your company have a written compliance process for dealing with OSS? By compliance process, we mean a standardized approach to dealing with OSS.



OSS Compliance – Compliance Actions

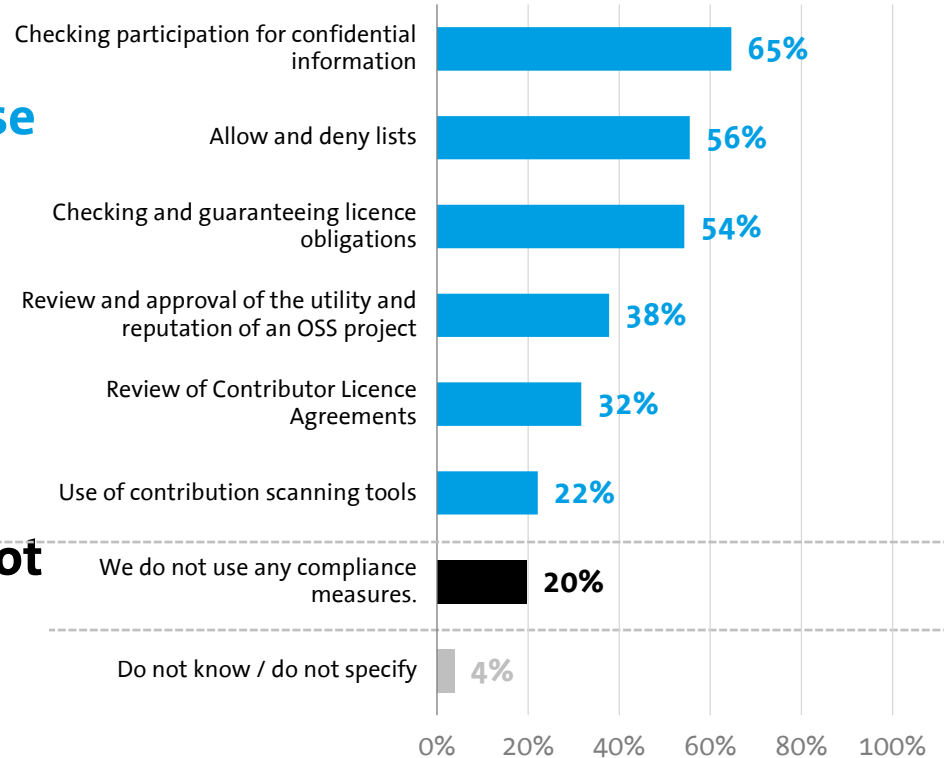
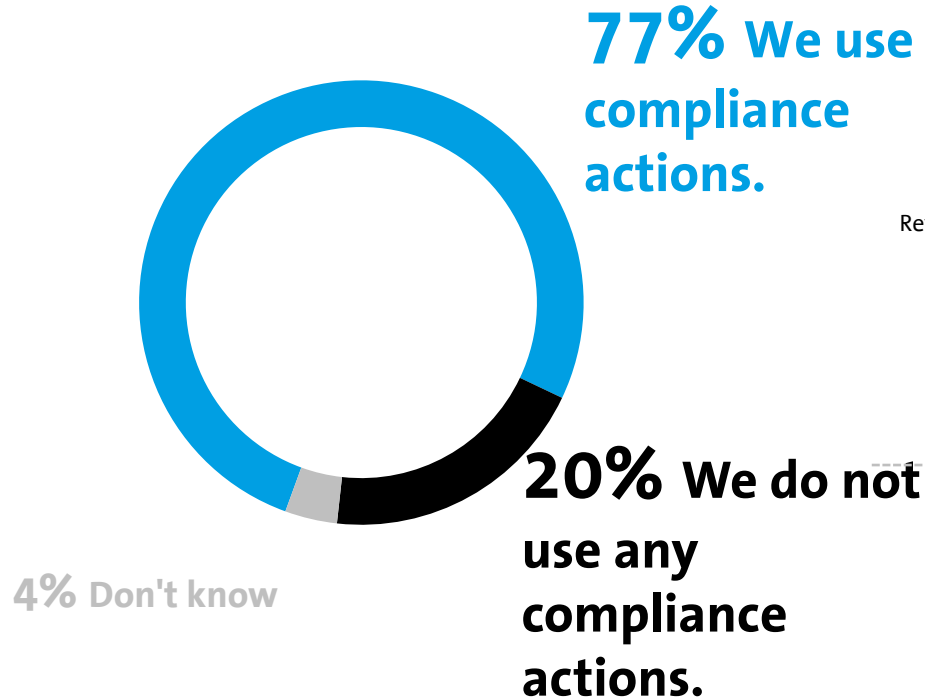
Compliance actions I – 20+ employees in total

Which of the following compliance measures and instruments for the **use or integration** of OSS are used in your company?



Compliance actions I – 20+ employees in total

Which of the following compliance measures and instruments are used in your company for **participation** in OSS projects or for the (further) development of OSS?

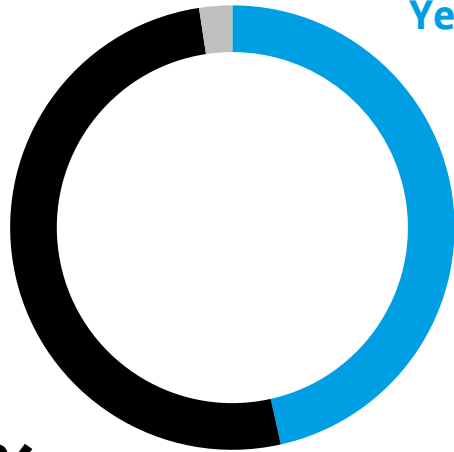


OpenChain Standard ISO 5230

Awareness openChain standard – 20+ employees total

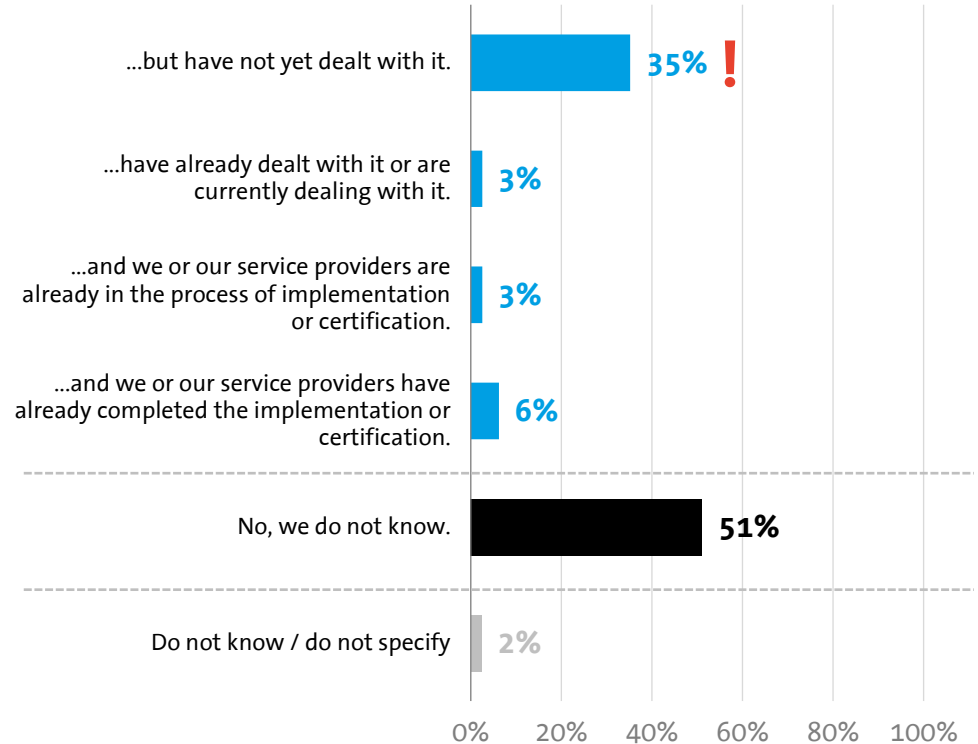
Do you know the OpenChain standard for OSS compliance or ISO 5230?

2% Don't know



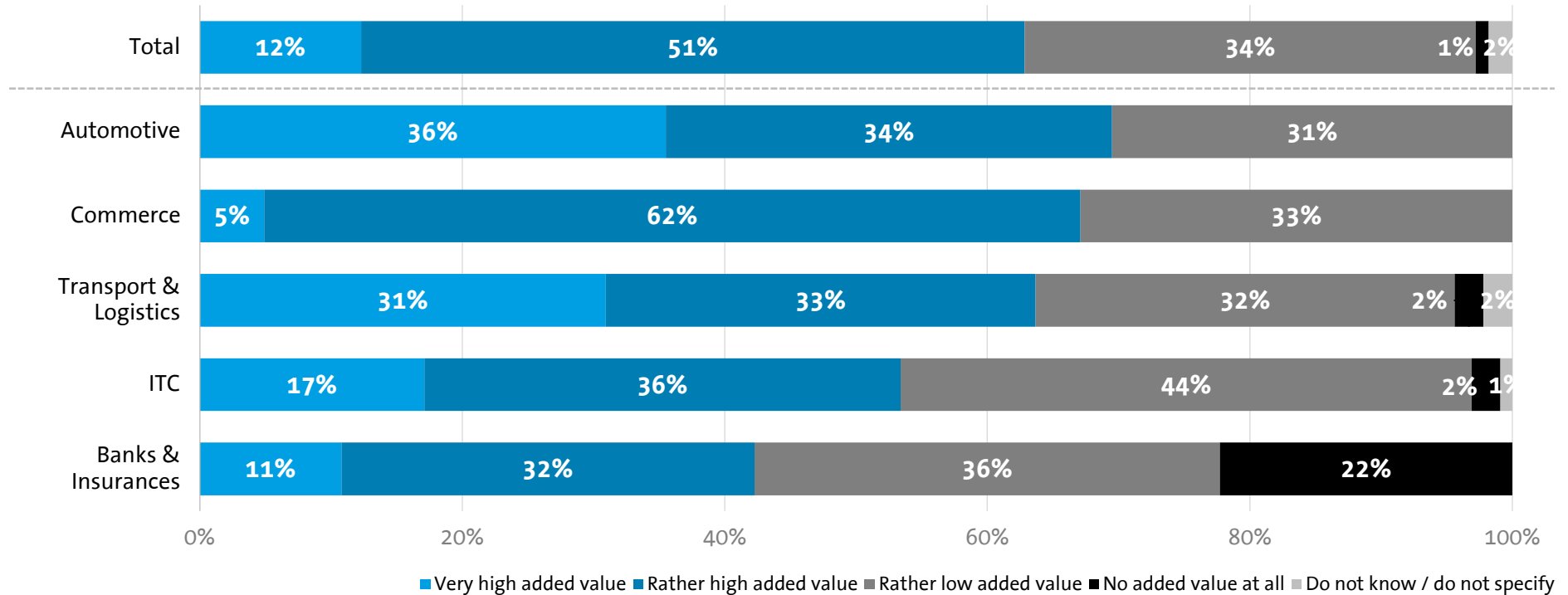
47%
Yes, we know.

51%
No, we don't know.



Added Value OpenChain Standard – 20+ employees Industries

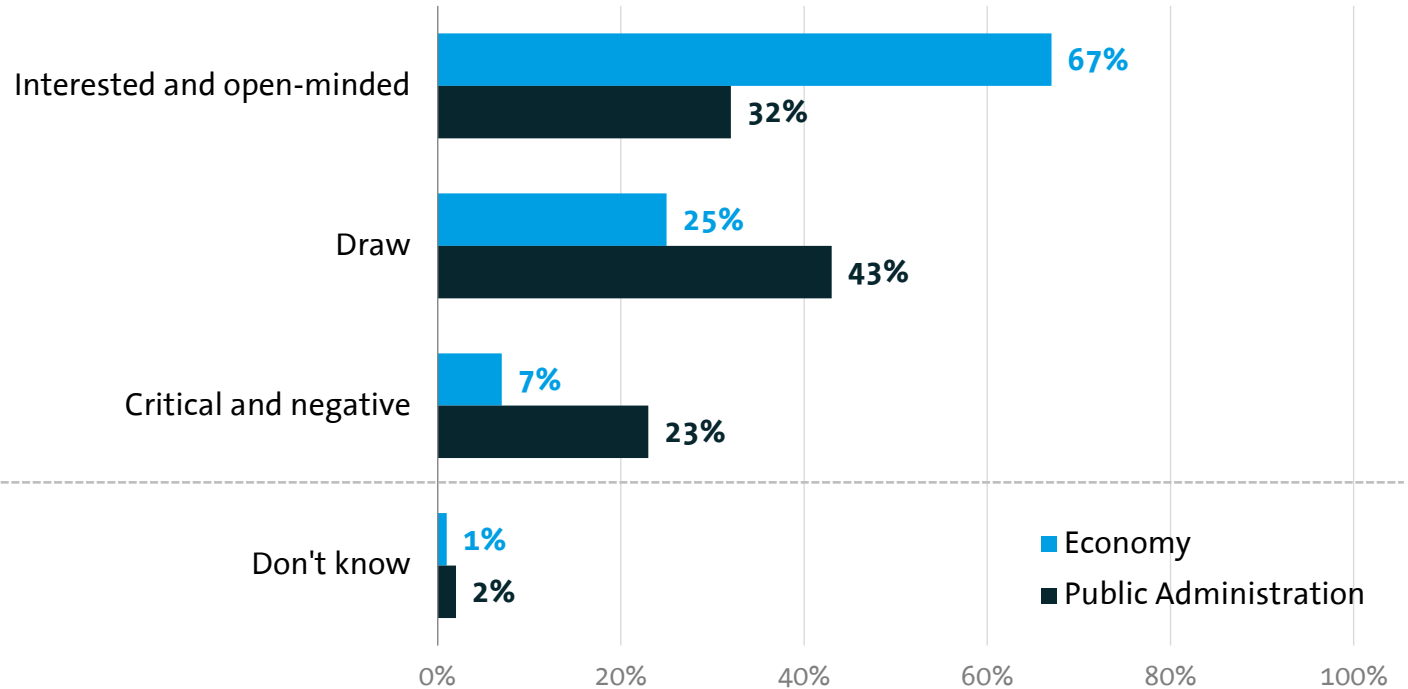
How do you assess the added value of the OpenChain standard for OSS compliance or ISO 5230 to increase OSS compliance??



Public Administration

Attitude towards open source software in public administration

How does your organization / company generally feel about OSS?



Advantages OSS – Economy vs. Public Administration

From your point of view, what is the biggest advantage that speaks for the use of OSS in your company?

Cost

Cost savings **14%** **24%**

Access to source code **7%** **14%**

Simple change of provider **8%** **8%**

Easy adaptation to own needs **5%** **5%**

Wide choice of OSS components **5%** **11%**

Better compatibility between tools and components **4%** **7%**

Open standards and interoperability **3%** **2%**

Large number of OSS providers with commercial support **2%** **2%**

Openness

High security through timely updates **7%** **3%**

High stability, low susceptibility to errors **2%** **5%**

IT Security

Broad and active community for knowledge exchange **4%** **3%**

Better competitive opportunities **3%**

Cooperation & Innovation

Promotion of innovations **1%** **1%**

Good reputation of OSS **1%** **3%**

Image

Attractive IT workplace, motivation for employees **0%** **1%**

No advantage

There is no advantage **14%** **17%**

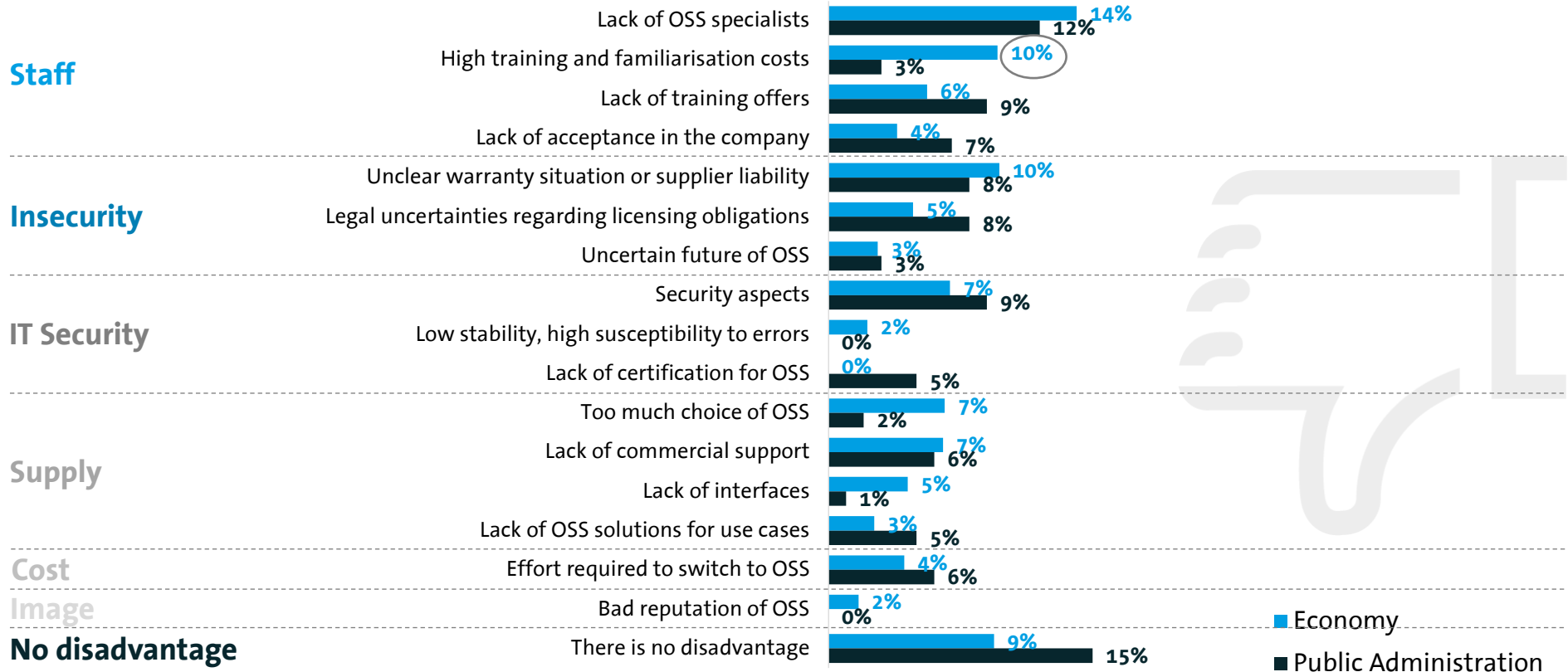
■ Economy

■ Public Administration



Disadvantages OSS – Economy vs. Public Administration

From your point of view, what is the biggest disadvantage that speaks against the use of OSS in your company?



And many more insights...



Open Source Monitor 2021

Rückblick: Ergebnisse des Open Source Monitor 2019

Open Source Software ist mittlerweile ein fester Bestandteil der digitalen Wirtschaft. Durch die Art ihrer Lizenzierung ist sie quelloffen und kostenfrei verteilbar. Sie stellt sowohl auf technischer als auch auf sozialer Ebene einen bedeutenden Faktor für die Digitale Transformation dar.

Die Einsatzmöglichkeiten und Auswirkungen von Open Source für Unternehmen und öffentliche Verwaltung werden in Wirtschaft, Gesellschaft und Politik diskutiert. Studien und Umfragen helfen diesen Debatten einen Rahmen zu geben und die notwendigen strategischen Entscheidungen auf einer zuverlässigen Informationsbasis zu treffen.

Gemeinsam mit Bitkom Research wurde mit dem Open Source Monitor 2021 eine repräsentative Unternehmensbefragung durchgeführt. Wir haben damit folgende Ziele erreicht:

- Fortführung der Studie „Open Source Monitor 2019“ und Erstellung einer Zeitreihe
- Durchführung einer repräsentativen Unternehmensbefragung mit mehr als 1.000 befragten Unternehmen
- Auswertungen differenziert nach Unternehmensgröße und ausgewählten Branchen
- Aussagekräftige Ergebnisse zu Voraussetzungen und Status Quo sowie der Perspektive von Open Source



Dr. Frank Termer
Bereichsleiter Software
Bitkom e.V.
[Nachricht senden](#)
[Profil](#)

<https://www.bitkom.org/opensourcemonitor>

Contact

Your contact persons

Bitkom e.V.

Bitkom Research

Albrechtstraße 10
10117 Berlin

T 030 27576 0

F 030 27576 400



Dr. Anja Weber

Head of Bitkom Research

E a.weber@bitkom-research.de

T 030 275 76 120



Dr. Frank Termer

Head of Software

E f.termer@bitkom.org

T 030 27576 232

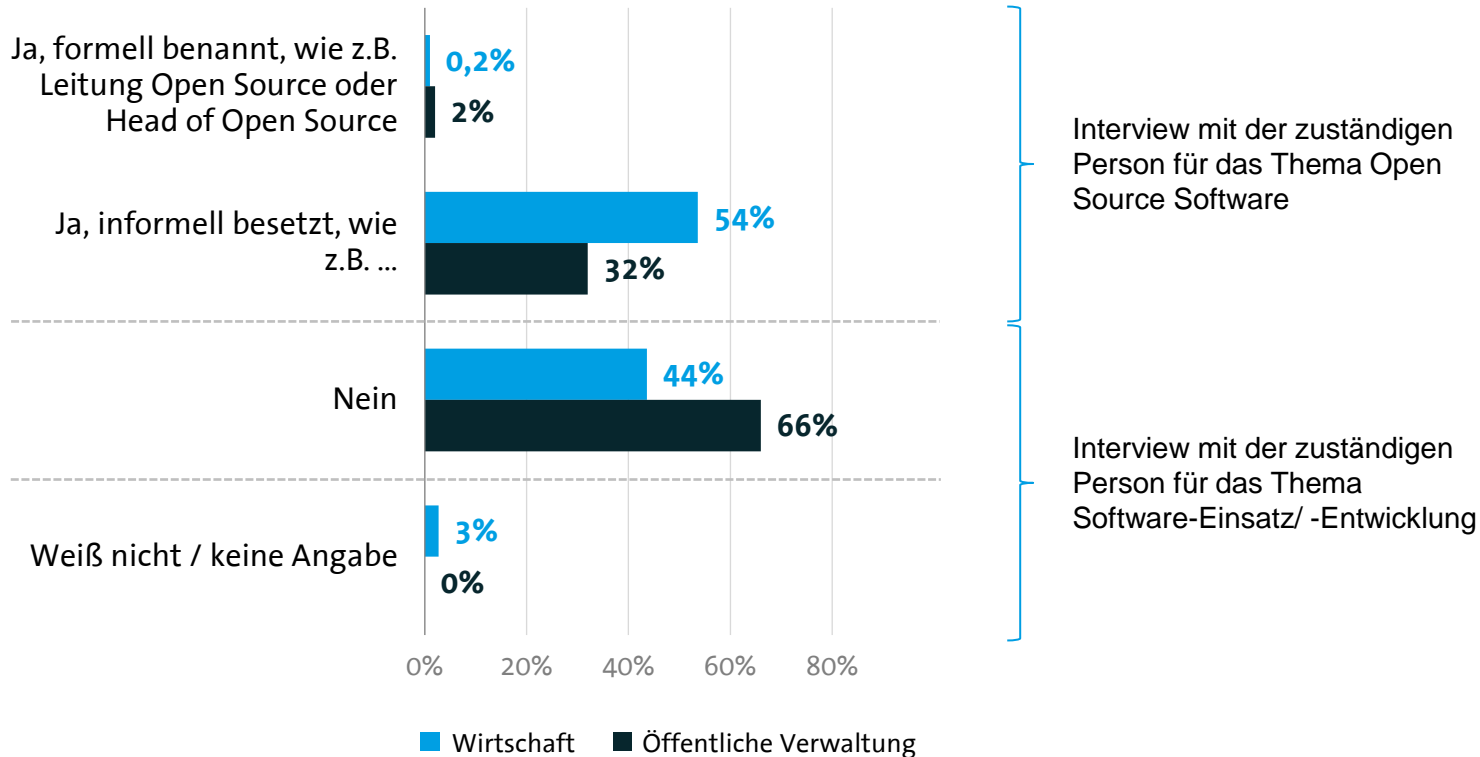
www.bitkom.org

www.bitkom-research.de

Backup

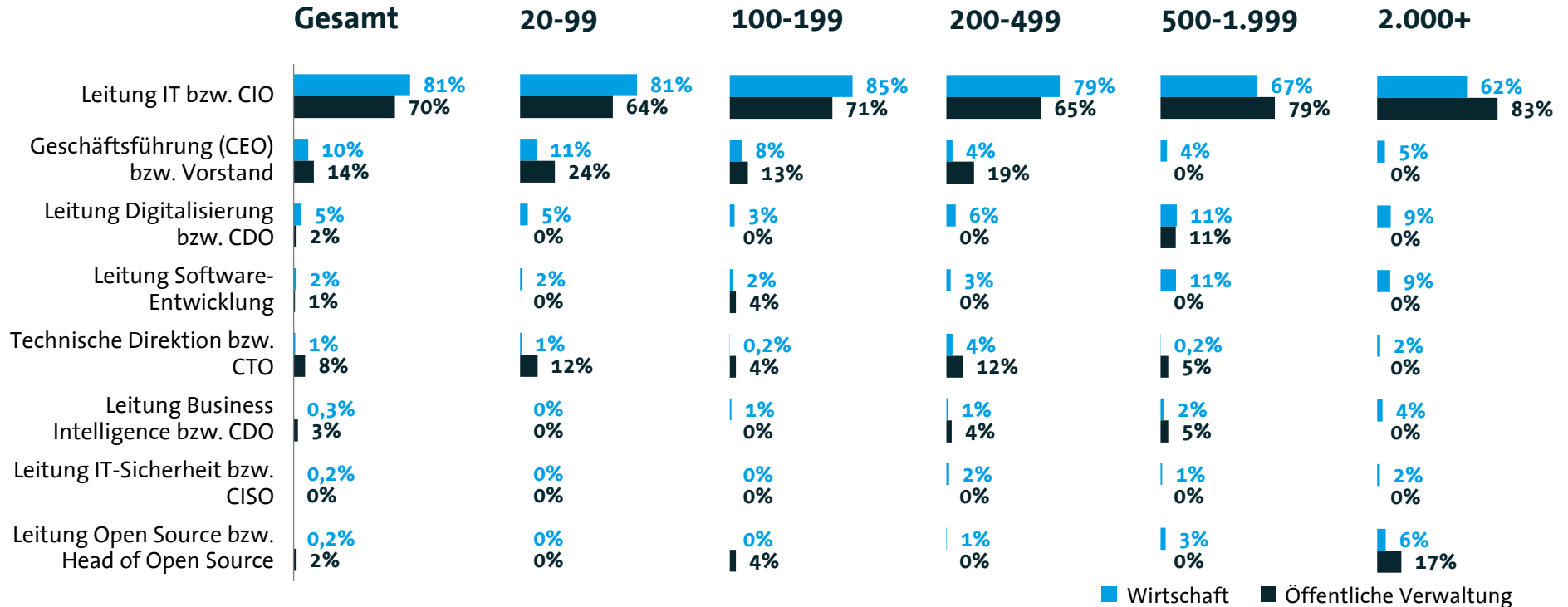
Übersicht der Funktionen der Befragten – Zuständigkeit

Gibt es in Ihrem Unternehmen eine Person, die für das Thema Open Source Software zuständig ist?



Übersicht der Funktionen der Befragten nach Größenklasse

Welche Funktion bekleiden Sie innerhalb Ihres Unternehmens / Ihrer Organisation?



Übersicht der Funktionen der Befragten nach Branche

Welche Funktion bekleiden Sie innerhalb Ihres Unternehmens / Ihrer Organisation?

