

ODF WORKSHOP

Open document format in the South
African Government

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Outline

- Policies
- Current activities
- Challenges

From SA Government Policy on open software, standards, content:

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.

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.

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

Electronic Records Policy

The National Archives and Records Service of South Africa Act, 1996 provides the legal framework according to which the National Archives and Records Service regulates the records management practices of all governmental bodies.

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- * determines the conditions subject to which electronic records systems should be managed to ensure that sound records management practices are applied to electronic records systems from the design phase onwards;
- * inspects public records to ensure that governmental bodies comply with the requirements of the National Archives and Records Service of South Africa Act;
- * issues directives and instructions as to the management and care of public records in the custody of governmental bodies;

Digital preservation strategy

“The adoption of internationally recognized data and document standards and the use of open standards will simplify the migration process.”

“Migrate records to a system that is compliant with open systems standards.”

Currently recommend ODF or PDF.

Minimum interoperability standards (MIOS)

- Issued by the Minister of Public Service and Administration as part of regulating ICT operations.
- All SA government ICT systems are subject to the MIOS.
- ODF is included in MIOS
- Effective date is an issue.

Current activities

- National standards
- ODF experimentation
- OpenOffice.org implementation
- Compiling ODF implementation guidelines
- Developing ECM systems that will accommodate ODF
- Standardising websites & portals

National standards

- Strategy to assist Standards South Africa (the national standards body) to compile government standards as national standards.
- Work on XML standards have started but is constrained by skills shortages.

ODF experimentation

- ODF has mostly been implemented on small scale only and/ or for non-sensitive records.
- Department of Defense have adopted a long term OSS implementation strategy.
- The first phase involves thorough testing of relevant software and migration paths.
- Experiment followed with interest due to expensive licensing of the proprietary software alternative.

OpenOffice.org implementation

- Individual users in many departments have installed and tested.
- A small number of institutions have phased out proprietary office suites, e.g.
 - National Library of South Africa
 - National Language Services
 - Council for Scientific and Industrial Research.

Compiling ODF implementation guidelines

- First set of guidelines did not address all issues.
- The need for discussion/ dialogue was underestimated when the directive to convert was issued.
- Skilled advisors to assist with implementation are needed.

Electronic Content Management systems to accommodate ODF

- Alfresco the preferred OSS solution.
- Piloted at the State IT Agency and Department of Science and Technology
- Extensive project to be launched at Department of Arts and Culture (DAC)
 - DAC includes National Archives
 - Method for dealing with legacy documents will be properly developed
 - Digitization to be properly addressed.

Standardizing websites and portals

- MIOS specifies web standards (e.g W3C)
- Strategic objectives
 - Websites to comply with web standards
 - Websites to migrate to OSS platforms
 - Downloadable documents all to be open (ODF, PDF, etc)

Challenges

- The deep foothold of proprietary formats
- Skills
- Training
- Templates
- Power users
- Document exchange
- Legacy documents
- National Archives regulations implementation
- Understanding & commitment

The deep foothold of proprietary formats

- Proprietary office suites are deeply embedded in organisations and their business systems e.g. financial statements templates..
- Sufficient commitment to phase them out does not yet exist.
- The ecosystem is not yet sufficiently developed to enforce ODF compliance does not yet exist, but may be in place in 2 – 3 years.
- The effect of the recession is starting to force departments to question the need for proprietary document processing.

Skills and training

- Insufficient skills available.
- Defined career paths to attract new entrants do not exist yet.
- Intention is to rely on private sector companies initially to provide expertise and skills.

Templates

- Some organisations have built up substantial numbers of templates for forms and reports in proprietary formats.
- Our advice currently:
 - Rather build new templates than try to convert existing ones.
 - Pay a contractor to do the work.

Power users

- Support to assist power users to convert to Open Standards spreadsheets and text documents is insufficient.
- The Council for Scientific and Industrial Research has managed, despite complex documents to make significant progress.

Document exchange

- The majority of organisations that interface with government still use proprietary formats. Smooth cooperation on document development is therefore difficult.
- This is also true for international cooperation. Scientists in particular experience this.

Legacy documents

- The strict interpretation of the law prohibits the change of official records. This could include changes to the document format.
- Review or reinterpretation of the law is needed.
- The volumes are enormous.

National Archives Regulations Implementation

- National Archives is challenged to train sufficient numbers of experts.
- Capacity to inspect adherence to regulations is insufficient.
- Records management generally is underdeveloped in many areas. ODF is therefore part of a bigger problem.

Understanding & commitment

- Other pressures prevent role players to give commitment to ODF. (Some departments are under heavy pressure to prepare for World Cup 2020.)
- The excellent functionality of FOSS office suites is not fully appreciated.
- Initial deadlines for implementing ODF were not met. New deadlines will only be set after more dialogue with users.

Conclusion

- High level backing for ODF implementation is in place.
- A few pockets of successful implementation exist.
- Further development of capacity and commitment is required.

QUESTIONS?

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