THE 2025 STATE OF OSPOs AND OPEN SOURCE MANAGEMENT

Aligning with New Organizational Priorities

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THE 2025 STATE OF OSPOs AND OPEN SOURCE MANAGEMENT

92% of OSPOs are actively involved in **OPEN SOURCE SECURITY,** with 42% acting as decision-makers & 50% *PROVIDING ADVISORY SUPPORT.*

79% of OSPOs are rated *EFFECTIVE IN MANAGING GENERATIVE AI RISKS,* compared to 65% in 2024.

49% of OSPOs use **INTERNAL COMPLIANCE PROCEDURES** to sustain themselves, followed by *LEGAL RISK MANAGEMENT* (36%) and *ACTIVITY REPORTING* (35%).

Organizations with an OSPO are *2.5X MORE LIKELY TO ALLOW UPSTREAM CONTRIBUTIONS* (70% vs. 30%).

92% of academic OSPOs report **IMPROVED OPEN SOURCE SKILLS** as their top impact.

Organizations with an OSPO are nearly *2X AS LIKELY TO ENCOURAGE OPEN SOURCE CONTRIBUTIONS* (59% vs. 30%).

STRATEGY GAPS (40%), *LACK OF EXECUTIVE BUY-IN* (35%), and *DIFFICULTY JUSTIFYING ROI* (35%) are the main challenges to OSPO set-up.

66% of OSPOs report **READINESS FOR EMERGING TECHNOLOGIES** such as generative AI and cloud native infrastructure as an impactful outcome.

...zations ...ed ...EXPERIENCE ...es.

88% of organizations perceive improved *SOFTWARE QUALITY AND SECURITY* as an impactful outcome of having an OSPO.

... gained ... within open ...stems due ... OSPO.

This year saw a *3X INCREASE* in organizations planning OSPOs within two years (from 15% in 2024 to 45%), all citing improved developer experience.

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FOREWORD

Open Source Program Offices (OSPOs) are strategic hubs that connect organizations with open source communities. While their traditional roles include compliance and security governance, OSPOs now play a broader role: supporting corporate business strategies, enabling cross-organizational and regional collaboration, and contributing to the resolution of social issues.

The *2025 State of OSPOs and Open Source Management* report highlights the expanding presence of OSPOs across different regions and industries. Notably, it conveys that organizations with an OSPO show a significantly higher level of OSS contribution, suggesting that OSPOs are an essential component of open innovation.

It also reveals that the focus and function of each OSPO vary depending on the size and geographic region of the organization, as it is often pointed out by the phrase "Your OSPO is not my OSPO." For example, large organizations tend to view OSPOs as partners of advanced technology strategies such as AI and cloud native solutions. In contrast, smaller organizations may not yet see OSPOs as strategic assets in the same way. By sharing the best practices through the Talk Openly Develop Openly (TODO) Group, I hope to see more companies recognize open source contribution as a core element of their technology strategy.

Despite these differences, common challenges for OSPOs are reported. One of the biggest challenges is the shortage of resources and the lack of sustainability. Collaboration through the TODO Group will contribute to addressing such challenges.

I believe this report will serve as a valuable resource for organizations that operate OSPOs, those that are planning to establish one, and anyone interested in OSPOs Furthermore, I hope that this report will inspire readers to share their own OSPO practices with the broader community, contributing to the continued evolution of OSPOs.

Yuichi Nakamura
Hitachi, Ltd.

EXECUTIVE SUMMARY

Our results reveal an acceleration in the operational and strategic maturity of OSPOs. While 2024 highlighted their growing adoption among small and medium-sized organizations, this year's data shows that OSPOs are not just proliferating; they are evolving into strategic governance hubs. Organizations are now embedding OSPOs more deeply into risk management and AI oversight, securing open source supply chains and sustaining long-term value through structured compliance and developer enablement.

OSPOs are increasingly recognized as vital governance entities, not only supporting contributions and licensing but actively shaping organizations' readiness for emerging technologies. In 2025, 66% of OSPOs reported improved preparedness for cloud native infrastructure and generative AI, and 79% were rated effective in managing generative AI risks, up from 65% in 2024. These findings reflect the OSPO's expanded role as a strategic risk radar, not just in license compliance but across emerging domains, such as AI and cybersecurity.

Security engagement remains high, with 92% of OSPOs involved in open source security initiatives (42% in decision-making roles and 50% in advisory capacities). Parallel to this, OSPOs are increasingly focused on self-preservation: 47% now report sustained engagement in long-term OSPO sustainability practices, a notable increase from 33% in 2024. These practices lean heavily on internal compliance (49%), legal risk governance (36%), and transparent reporting (35%).

Beyond compliance, OSPOs continue to normalize contribution practices. Organizations with an OSPO are nearly 2.5x more likely to permit upstream contributions (70% vs. 30%) and 1.4x more likely to actively encourage participation (59% vs. 41%), indicating that OSPOs are essential to building a healthy contribution culture. Impact metrics remain strong: 88% of organizations with an OSPO report improvements in software quality and security, 89% in developer experience, and 86% in ecosystem influence.

Academic OSPOs are also gaining traction, with 92% identifying improved open source skills as their top impact. They serve as critical bridges between research and practice, helping translate university innovation into open source contributions with real-world impact.

Nonetheless, significant barriers to OSPO adoption persist. Strategy gaps (40%), lack of executive buy-in (35%), and challenges justifying ROI (35%) remain the most commonly cited obstacles, suggesting that, while technical momentum is strong, organizational alignment is still catching up. As organizations face increasing pressure to align innovation, compliance, and ecosystem engagement, those investing in structured, sustainable OSPOs—anchored by policy, education, and infrastructure—will be best positioned to navigate the next wave of open source transformation.

Together, these findings paint a clear picture: OSPOs are not static units; they are evolving with the organizations they serve. From foundational compliance to strategic innovation, OSPOs are maturing into essential actors for risk-aware and open collaboration enablers in the modern technology ecosystem.

INTRODUCTION

Now in its fifth year, this report presents a global analysis of Open Source Program Offices (OSPOs), based on a survey fielded between May and June 2025 that collected 338 responses in total. The sample includes those whose organizations either currently have a formal or informal OSPO, had one in the past, or are planning (or explicitly not planning) to establish one. The survey provides a nuanced view into the evolving role, structure, and priorities of OSPOs across sectors and regions.

With generative AI and cloud native architectures driving transformation across industries, OSPOs are increasingly positioned as strategic hubs: balancing risk management, talent enablement, and software quality at scale.

As organizations move beyond curiosity and into implementation, OSPOs are no longer optional experiments. They are becoming foundational to how technical organizations govern, contribute to, and sustain the open source technologies they depend on. This report synthesizes the latest findings to support continued growth, formalization, and strategic clarity for the OSPO ecosystem.

This report is organized into 12 sections that trace how OSPOs are evolving across industries and regions. It defines what constitutes an OSPO; examines the OSPO's role in enabling contribution and policy; and explores trends in formalization, regional adoption, and responses to challenges such as security and AI risks. The report also covers OSPO responsibilities, benefits, sustainability practices, and the unique dynamics of academic OSPOs.

DEFINING OSPO

There is ambiguity about the definition of OSPO. Various regions and sectors—ranging from formally structured offices with dedicated teams to informal, cross-functional groups coordinating open source activity—interpret the term differently.

In this report, when we use the term OSPO, we refer to any function responsible for the strategic and operational management of open source, whether formally structured or informally coordinated. This definition includes:

- OSPOs with formal reporting lines, job titles, and staff

- Informal or virtual OSPOs without dedicated personnel

For a deeper understanding of how the OSPO concept has evolved and how it is being interpreted in different sectors and geographies, we recommend Chapter 1 of the OSPO Book,[1] developed by the TODO Group.

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1   https://ospobook.todogroup.org/

OSPOs AS ENABLERS OF CONTRIBUTION CULTURE

OSPOs play a critical role in shaping how organizations engage with open source, not only in terms of code usage but also through active contribution. Organizations with an OSPO are significantly more likely to follow formal policies governing both the use of and contribution to open source technologies.

Without an OSPO, open source policies skew heavily toward usage, and contribution lags significantly. Organizations with OSPOs reported following a formal policy governing use at a higher rate than organizations without OSPOs, which prioritize usage but fall short on enabling contribution (see Figures 1 and 2). For example, 85% of OSPO-enabled organizations report frequently enforcing policies on the use of open source code in their products, compared to just 59% of those without an OSPO.

This difference extends beyond usage to contribution practices. As Figure 1 illustrates, half of organizations with an OSPO report frequently contributing upstream to open source projects, while only 14% of those without one do the same, as Figure 2 shows. The same pattern holds for releasing open source code (46% vs. 14%) and sponsoring open source initiatives (39% vs. 9%). These disparities underscore the enabling role of OSPOs, not just as operational units, but as governance structures that foster transparency, accountability, and ecosystem engagement.

FIGURE 1

How often does your organization follow a formal policy governing use and/or contribution to open source projects in the following areas? (Organizations that have an OSPO)

2025 OSPO Survey, Q8/Q10, sample size = 116, organizations that have an OSPO (formal or informal), sorted in descending order based on "Frequently", DKNS responses excluded from the analysis
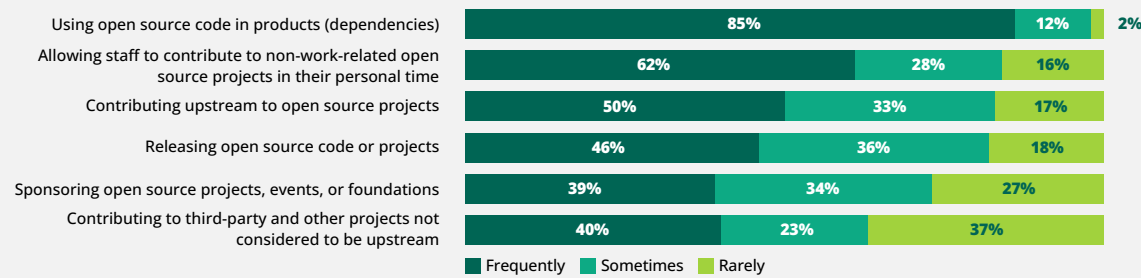

	Frequently	Sometimes	Rarely
Using open source code in products (dependencies)	85%	12%	2%
Allowing staff to contribute to non-work-related open source projects in their personal time	62%	28%	16%
Contributing upstream to open source projects	50%	33%	17%
Releasing open source code or projects	46%	36%	18%
Sponsoring open source projects, events, or foundations	39%	34%	27%
Contributing to third-party and other projects not considered to be upstream	40%	23%	37%

FIGURE 2

How often does your organization follow a formal policy governing use and/or contribution to open source projects in the following areas? (Organizations that do not have an OSPO)

2025 OSPO Survey, Q8/Q10, sample size = 145, organizations that do not have an OSPO (dissolved, in the plans, or never had an OSPO), sorted in descending order based on "Frequently", DKNS responses excluded from the analysis

	Frequently	Sometimes	Rarely
Using open source code in products (dependencies)	59%	24%	17%
Allowing staff to contribute to non-work-related open source projects in their personal time	37%	23%	40%
Contributing upstream to open source projects	14%	30%	56%
Releasing open source code or projects	14%	27%	59%
Contributing to third-party and other projects not considered to be upstream	10%	23%	67%
Sponsoring open source projects, events or foundations	9%	18%	73%

FROM PERMISSION TO PARTICIPATION: OSPOs NORMALIZE UPSTREAM CONTRIBUTION

This policy gap is even more apparent when we examine organizations' stances on contributing upstream to open source projects. OSPOs institutionalize contribution-friendly policies, transforming open source from a tactical tool into a strategic, participatory practice.

Further evidence of OSPOs' influence appears in Figure 3, which focuses specifically on formal policies for upstream contribution. Organizations with an OSPO are far more likely to encourage contributions (59% vs. 41%) and are far more likely to allow them (70% vs. 30%). This policy and contribution culture gap reveals how OSPOs formalize supportive norms and reduce internal friction,

helping teams move from passive consumption to strategic participation in open source communities.

These differences in contribution and policy practices underscore how OSPOs help formalize and scale open source strategies. The influence of OSPOs does not stop at internal governance; it also varies across regions.
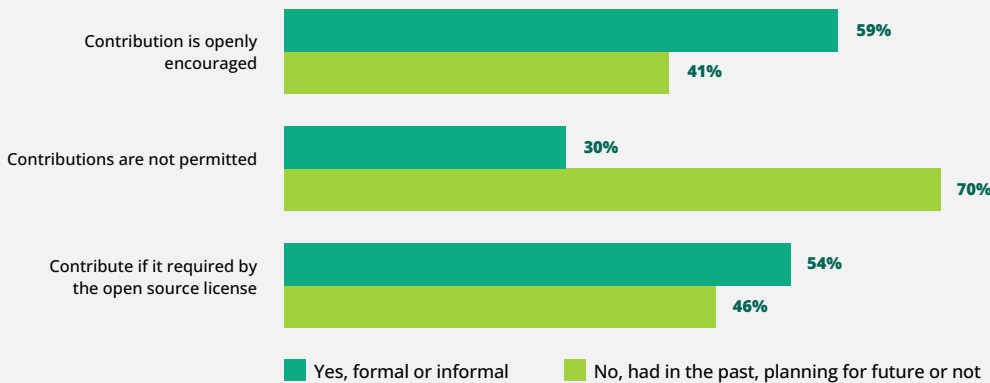
Regional differences also shape how organizations approach upstream contribution policies. As Appendix A1 shows, 47% of organizations headquartered in the Americas and 41% in Europe report that they openly encourage contributions. In contrast, only 32% of organizations in Asia-Pacific report the same, and 11% in that region explicitly prohibit contributions, the highest across all regions. These patterns suggest that, while organizations in Western regions increasingly normalize open source participation, some in Asia-Pacific may operate under more conservative internal governance structures. This underscores the need to consider regional context when evaluating open source maturity and policy enablement.

Together, these findings challenge the notion that open source engagement emerges organically within organizations or follows a uniform global trajectory. Instead, they emphasize the importance of formal structures (such as formal OSPOs) in enabling consistent, strategic participation. While some regions are further along in normalizing contribution practices, others remain constrained by more conservative internal policies, highlighting the need for organizational mechanisms that can adapt to local governance realities while promoting global engagement. This evolution mirrors broader shifts apparent in domains such as cybersecurity and data governance, where informal practices have matured into institutionalized programs. Just as growing concerns around data privacy spurred the creation of chief privacy officers and compliance units, the rising strategic importance of open source is accelerating the institutionalization of OSPOs as essential actors in

FIGURE 3

Which of the following best describes your organization's formal policy on contributing to upstream open source projects?

2025 State of OSPO, Q9/Q10, sample size = 285, DKNS excluded from analysis

Contribution is openly encouraged: 59% / 41%

Contributions are not permitted: 30% / 70%

Contribute if it required by the open source license: 54% / 46%

Legend:
- Yes, formal or informal
- No, had in the past, planning for future or not

modern software ecosystems. By coordinating policies, educating internal teams, and guiding contribution strategy, OSPOs are becoming central enablers of modern software innovation.

THE REBOUND IN FORMAL OSPOs

Formally structured OSPOs are making a comeback. Figure 4 shows that, after declining from 43% in 2023 to 26% in 2024, their prevalence rose to 32% in 2025, suggesting renewed momentum toward institutionalizing open source governance.

2025 has seen a rebound in formal OSPOs, while informal models continue to decline. As Figure 4 shows, this rebound contrasts with the steady decline of informal OSPO models, dropping from 23% in 2023 to just 18% in 2025. These informal structures, which often rely on part-time roles or cross-functional coordination, may be losing traction either due to a lack of sustainability or a shift toward more formal investment. Planning rates also fell from 12% to 9%, possibly signaling that organizations are moving beyond experimentation or deprioritizing OSPO formation altogether.

Global adoption patterns reveal regional disparities in how formalization is taking shape. As shown in Figure 5, **global adoption of OSPOs varies widely with emerging formalization in Asia-Pacific.** While 37% of Asia-Pacific organizations with an OSPO report having a formally structured model, this trend appears to be concentrated among larger organizations: 50% of these formal OSPOs are found

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Does your organization currently have, or has it ever had, an OSPO or a similar open source initiative? (per year)

2025 OSPO Survey, Q10, sample size = 285; 2024 OSPO Survey, Q12, sample size = 222; 2023 OSPO Survey, Q9, sample size = 472; 2022 OSPO Survey, Q6, sample size = 950, DKNS excluded from analysis
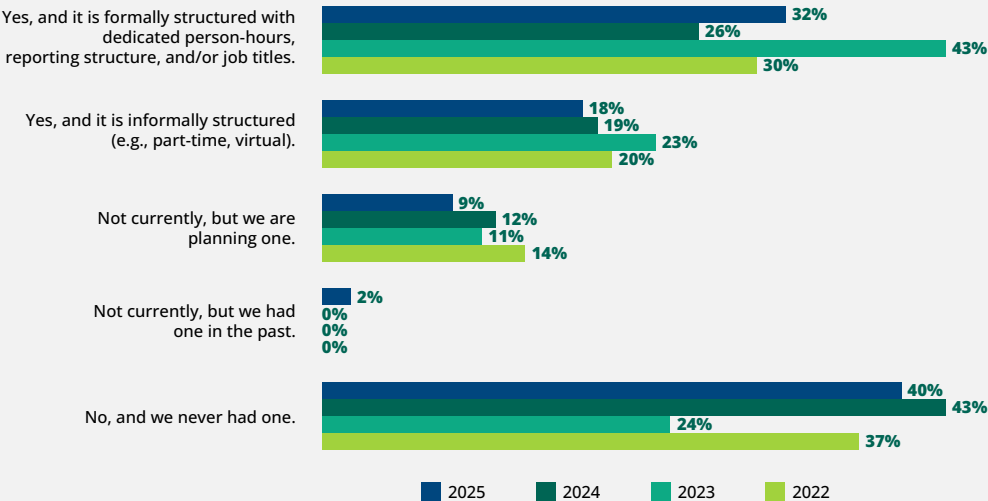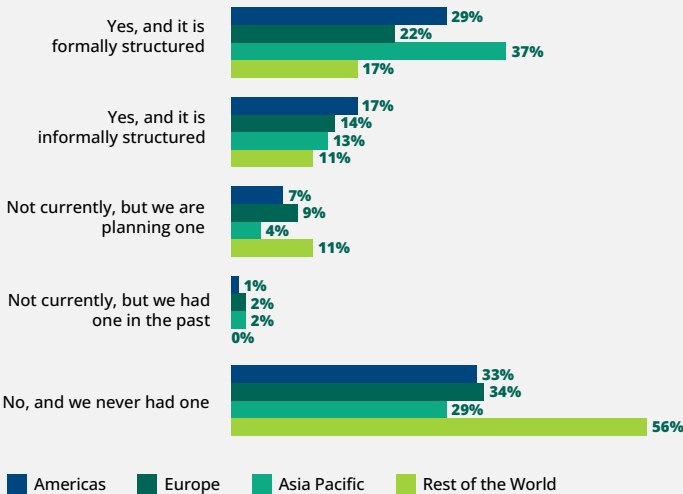
Yes, and it is formally structured with dedicated person-hours, reporting structure, and/or job titles.
- 2025: 32%
- 2024: 26%
- 2023: 43%
- 2022: 30%

Yes, and it is informally structured (e.g., part-time, virtual).
- 2025: 18%
- 2024: 19%
- 2023: 23%
- 2022: 20%

Not currently, but we are planning one.
- 2025: 9%
- 2024: 12%
- 2023: 11%
- 2022: 14%

Not currently, but we had one in the past.
- 2025: 2%
- 2024: 0%
- 2023: 0%
- 2022: 0%

No, and we never had one.
- 2025: 40%
- 2024: 43%
- 2023: 24%
- 2022: 37%

Legend: 2025, 2024, 2023, 2022

Does your organization currently have, or has it ever had, an OSPO or a similar open source initiative? (per region)

2025 OSPO Survey, Q10/Q5, sample size = 337, DKNS excluded from analysis

Yes, and it is formally structured
- Americas: 29%
- Europe: 22%
- Asia Pacific: 37%
- Rest of the World: 17%

Yes, and it is informally structured
- Americas: 17%
- Europe: 14%
- Asia Pacific: 13%
- Rest of the World: 11%

Not currently, but we are planning one
- Americas: 7%
- Europe: 9%
- Asia Pacific: 4%
- Rest of the World: 11%

Not currently, but we had one in the past
- Americas: 1%
- Europe: 2%
- Asia Pacific: 2%
- Rest of the World: 0%

No, and we never had one
- Americas: 33%
- Europe: 34%
- Asia Pacific: 29%
- Rest of the World: 56%

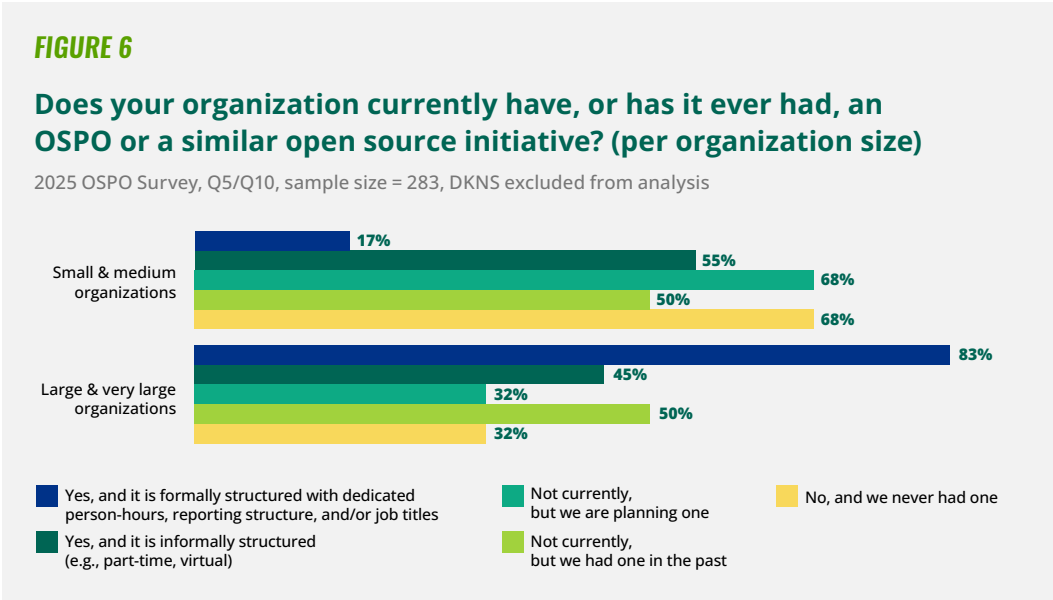Legend: Americas, Europe, Asia Pacific, Rest of the World

within large and very large companies (Appendix A2), suggesting that formalization in the region is largely driven by organization-scale adoption.

To broaden adoption, especially among smaller organizations, experts have pointed to the viability of lightweight OSPO models. As Ana Jimenez from the TODO Group explains, part-time roles or cross-functional working groups already in use in Europe and the Americas could serve as accessible templates for regions where formal OSPOs may be out of reach.

"To support broader adoption of OSPOs beyond large enterprises, small and medium organizations in Asia-Pacific could benefit from a lightweight OSPO model. For instance, survey data shows that informal OSPOs (cross-functional working groups or part-time roles embedded within engineering, legal, and other business teams) are viable models used by smaller organizations in other regions, such as Europe and the Americas."

— Ana Jimenez, TODO Group

FIGURE 6

Does your organization currently have, or has it ever had, an OSPO or a similar open source initiative? (per organization size)

2025 OSPO Survey, Q5/Q10, sample size = 283, DKNS excluded from analysis

Small & medium organizations
- 17%
- 55%
- 68%
- 50%
- 68%

Large & very large organizations
- 83%
- 45%
- 32%
- 50%
- 32%

- Yes, and it is formally structured with dedicated person-hours, reporting structure, and/or job titles
- Yes, and it is informally structured (e.g., part-time, virtual)
- Not currently, but we are planning one
- Not currently, but we had one in the past
- No, and we never had one

These findings highlight both the resurgence of formal OSPOs and the evolving needs of smaller organizations navigating open source strategy with limited resources.
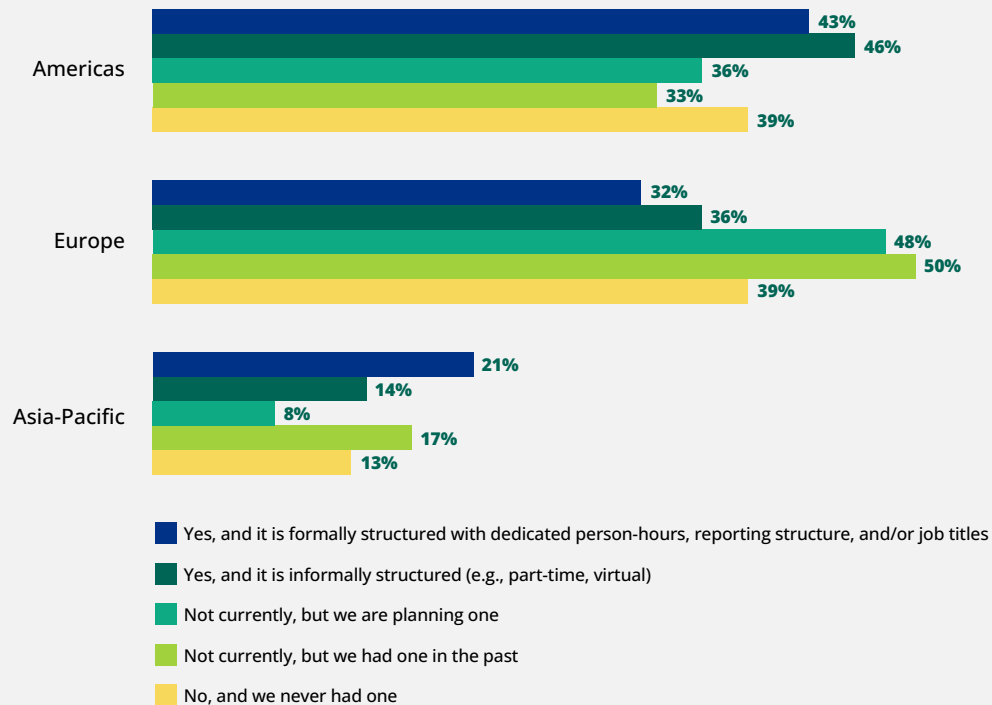
OSPOs ARE NOT JUST FOR BIG PLAYERS

OSPOs are gaining traction globally, but patterns of adoption and formalization vary significantly across organization sizes and regions. **Organizational size plays a central role in shaping OSPO structures.** As Figure 6 shows, 83% of large and very large organizations report having a formally structured OSPO, indicating high levels of operational maturity and resource commitment. In contrast, 72% of small and medium-sized organizations reported having an OSPO, but most (55%) operate informally, with part-time roles, virtual structures, or cross-functional responsibilities. Notably, 68% of small and medium-sized organizations are planning to establish an OSPO, signaling expanding awareness of open source governance even among resource-constrained entities.

Regional trends reveal important differences in OSPO maturity and sustainability. According to Figure 7, organizations in the Americas show strong current engagement, with 89% of organizations reporting an OSPO, either formal (43%) or informal (46%). However, the region also stands out for its moderate rates of dissolved or restructured OSPOs (33%), suggesting experimentation but some churn in sustaining OSPOs. Europe, by contrast, shows a more complex picture. While 68% of organizations report having an OSPO, either formal (32%) or informal (32%), a striking 50% say they had one in the past. This indicates challenges in maintaining long-term OSPOs. Asia-Pacific shows early signs of growth, with 35% of organizations currently reporting an OSPO, either formal (21%) or informal (14%), and another 8% planning one. Asia-Pacific organizations report a higher rate of formally structured OSPOs over informal ones, suggesting more advanced institutionalization of open source strategy in the region (details in Appendix A2).

FIGURE 7

Does your organization currently have, or has it ever had, an OSPO or a similar open source initiative? (per region)

2025 OSPO Survey, Q6/Q10, sample size = 285, DKNS and Rest of the World excluded from the analysis

Americas
- 43%
- 46%
- 36%
- 33%
- 39%

Europe
- 32%
- 36%
- 48%
- 50%
- 39%

Asia-Pacific
- 21%
- 14%
- 8%
- 17%
- 13%

■ Yes, and it is formally structured with dedicated person-hours, reporting structure, and/or job titles
■ Yes, and it is informally structured (e.g., part-time, virtual)
■ Not currently, but we are planning one
■ Not currently, but we had one in the past
■ No, and we never had one

These findings underscore that, while OSPOs are becoming a global phenomenon, their adoption and evolution are far from uniform. In the Americas, OSPOs are widespread but still in flux, with high informal adoption and signs of restructuring. Europe reflects a more historically rooted engagement with OSPOs yet also faces challenges in sustaining them over time. Asia-Pacific, though currently behind in adoption rates, shows promising momentum, especially among organizations that have already committed to formalizing their efforts. As global awareness of open source governance grows, these regional trajectories offer valuable insight into the diverse pathways organizations are taking to institutionalize OSPOs and support long-term ecosystem participation.

THE IMPACT OF OSPOs ON SECURITY AND AI RISK ASSESSMENT

As open source becomes increasingly central to software infra-structure, security and risk management are top priorities. OSPOs have emerged as important governance units, not just for policy coordination and ecosystem engagement but also for mitigating risk in complex, distributed development environments. Our results revealed that OSPOs are playing a stable and growing role in two high-stakes domains: open source security and generative AI risk management.

OSPO involvement in open source security has remained consistent since 2024. Organizations with an OSPO report consistent involvement in open source security processes. As Figure 8 shows, 92% of OSPOs either make decisions on security or advise teams responsible for it. The share of OSPOs directly guiding security decision-making rose to 42% in 2025, up from 38% in 2024, while advisory involvement remained steady at around 50%. Only 7% of OSPO-enabled organizations say they do not address open source security at all, a decline from 10% in 2024.

These findings indicate that OSPOs are currently a dependable pillar of organizational security strategy, whether driving decisions directly or guiding responsible teams through advisory roles. The consistent distribution between hands-on and advisory involvement reflects a growing maturity in how organizations balance centralized oversight with decentralized execution, enabling scalable and coordinated responses to open source security challenges.

"Compliance with the E.U. CRA has no doubt added to the importance of OSPOs being involved in open source security from the outset in many organizations. Meaningful engagement with policy and implementing open source security strategies will continue to be important areas of focus."

— Natali Vlatko, Open Source Lead Architect, Cisco

OSPOs are also proving instrumental in managing compliance related to generative AI. As Figure 9 shows, 79% of OSPO-enabled organizations in 2025 reported that their OSPO is effective in managing AI-related risks, up 14 percentage points from 65% in 2024. At the same time, the proportion of organizations reporting ineffectiveness fell sharply, from 35% in 2024 to just 21% in 2025.

FIGURE 8

Does your OSPO directly address open source security issues?

2025 OSPO Survey, Q13, sample size = 116, organizations that have an OSPO (formal or informal), DKNS excluded from analysis 2024 OSPO Survey, Q16, sample size = 100, organizations that have an OSPO (formal or informal), DKNS excluded from analysis
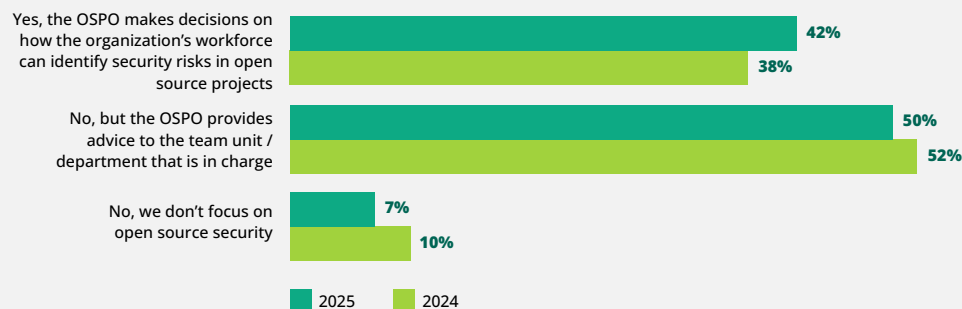
Yes, the OSPO makes decisions on how the organization's workforce can identify security risks in open source projects: 42% (2025), 38% (2024)

No, but the OSPO provides advice to the team unit / department that is in charge: 50% (2025), 52% (2024)

No, we don't focus on open source security: 7% (2025), 10% (2024)
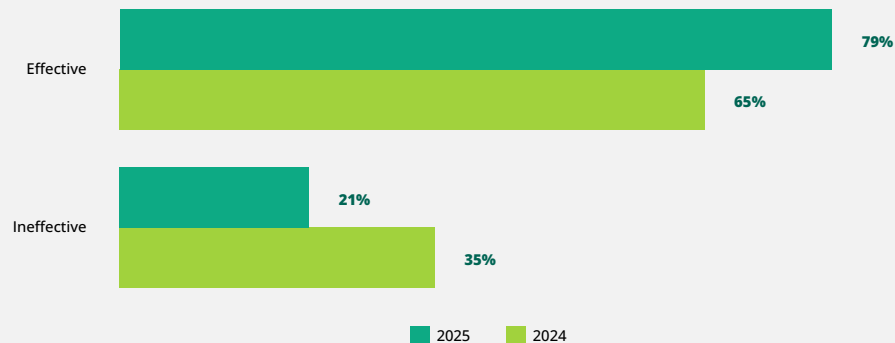
■ 2025   ■ 2024

FIGURE 9

OSPOs are becoming more effective in managing generative AI risks

2025 OSPO Survey, Q14, sample size = 116, organizations that have an OSPO (formal or informal)

2024 OSPO Survey, Q19, sample size = 100, organizations that have an OSPO (formal or informal)

Answers of "Extremely effective," "Very effective," and "Effective" grouped into "Effective," and answers of "Extremely ineffective" and "Very ineffective" grouped into "Ineffective"

Effective
- 79% (2025)
- 65% (2024)

Ineffective
- 21% (2025)
- 35% (2024)

■ 2025 ■ 2024

FIGURE 10

Regional differences in OSPO roles for AI infrastructure

2025 OSPO Survey, Q6/Q15, sample size = 116, DKNS and Rest of the World excluded from analysis

Region	Leads	Regularly consulted	Occasionally involved	No role
Americas	2%	36%	36%	26%
Europe	17%	33%	37%	13%
Asia-Pacific		33%	33%	33%

■ Leads the development and management of AI infrastructure
■ Regularly consulted for their expertise in open source
■ Occasionally involved in the processes of licensing compliance and security checks
■ No role in the development or management of AI infrastructure

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This improvement points to growing operational alignment between OSPO-led governance models and the evolving demands of AI compliance. The data signals that many organizations are successfully embedding or expanding OSPO responsibilities to address complex emerging risks, beyond traditional open source concerns.

HOW OSPOs DRIVE IMPACT DIFFERENTLY ACROSS REGIONS

As open source gains strategic relevance across industries, the role of OSPOs in enabling development and resourcing varies significantly across geographies. Regional differences shape how OSPOs are integrated into organizational infrastructure, particularly in emerging domains such as artificial intelligence (see Figure 10). These variations reveal differing levels of maturity, engagement, and governance alignment in how open source is operationalized.

In Europe, a combined 87% of organizations report some degree of OSPO involvement in AI infrastructure, either leading (17%), being regularly consulted (33%), or occasionally involved (37%). This widespread engagement underscores the region's proactive stance in embedding open source governance within AI strategy and infrastructure decisions.

The Americas present a more support-oriented model. Just 2% of organizations report their OSPO leads AI infrastructure efforts. Instead, most play advisory (36%) or compliance-focused roles (36%), with over a quarter (26%) reporting no OSPO involvement in AI infrastructure at all. This pattern suggests that, while open source remains important, the OSPO's role in AI is still more reactive and decentralized in the Americas.

Asia-Pacific reflects both growing interest and persistent uncertainty. While no respondents reported OSPOs leading AI infrastructure, 66% participated either through consultation or
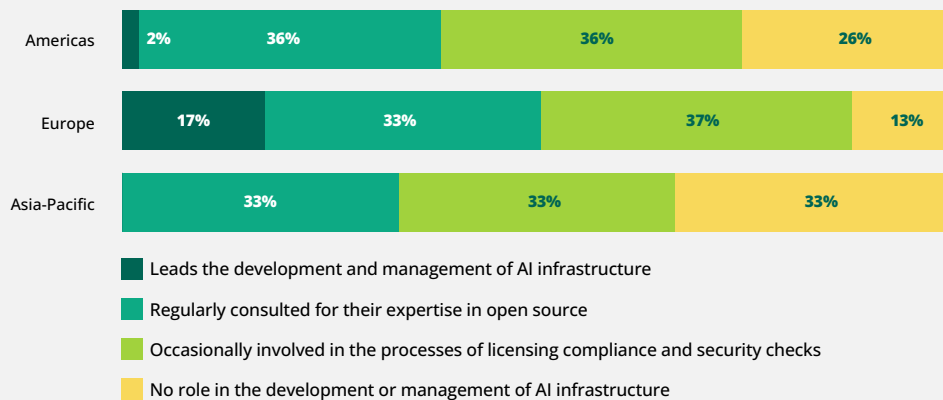
occasional involvement. However, one-third of organizations in the region report no OSPO role in AI, highlighting a gap in strategic alignment between open source governance and emerging technology priorities.

These regional differences suggest that, while the presence of OSPOs is spreading globally, their strategic influence, particularly in AI-related initiatives, remains uneven. Europe appears to lead in integrating OSPOs into forward-looking tech governance, while the Americas emphasize support and risk mitigation.

BIG IMPACT AND BIG RESPONSIBILITIES

As OSPOs mature, their roles evolve from hands-on execution toward more strategic functions. However, this evolution is not uniform: it varies 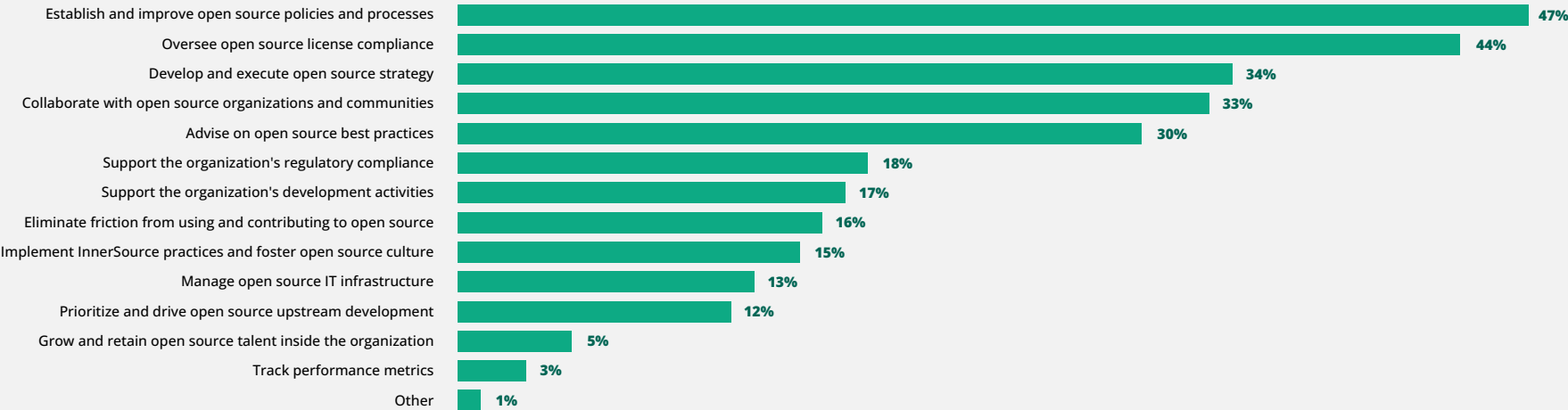significantly by how OSPOs are structured and where they operate globally. The following section examines these differences across three lenses: priorities, structure, and regional location.

Figure 11 reveals that the top five responsibilities cited by OSPOs emphasize strategic alignment and internal governance. The most common responsibility is establishing and improving open source policies and processes, selected by 47% of respondents, followed closely by overseeing open source license compliance (44%). Developing and executing open source strategy ranks third (34%), while collaboration with open source organizations and communities (33%) and advising on open source best practices (30%) round out the top five. These priorities highlight the OSPO's central role as a strategic enabler—focusing on policy, compliance, and external engagement—rather than serving as an operational driver. Lower selection rates for responsibilities such as infrastructure management, upstream development, or talent retention indicate that many OSPOs are positioned to guide, coordinate,

FIGURE 11

What are the top three responsibilities of your OSPO?

2025 OSPO Survey, Q16, sample size = 116, DKNS excluded from analysis

Responsibility	Percent
Establish and improve open source policies and processes	47%
Oversee open source license compliance	44%
Develop and execute open source strategy	34%
Collaborate with open source organizations and communities	33%
Advise on open source best practices	30%
Support the organization's regulatory compliance	18%
Support the organization's development activities	17%
Eliminate friction from using and contributing to open source	16%
Implement InnerSource practices and foster open source culture	15%
Manage open source IT infrastructure	13%
Prioritize and drive open source upstream development	12%
Grow and retain open source talent inside the organization	5%
Track performance metrics	3%
Other	1%

and steward open source efforts across departments rather than directly execute technical tasks.

Differences in OSPO responsibilities also reflect their level of formalization. As Appendix A6 shows, formal OSPOs are significantly more likely to focus on strategic governance. Over half (57%) report responsibility for establishing open source policies and processes, compared to just 29% of informal OSPOs. Similarly, 39% of formal OSPOs lead the development and execution of open source strategy, vs. 24% of informal ones. Notably, formal OSPOs are also more engaged in external collaboration, with 39% prioritizing partnerships with OSS organizations and communities, compared to 22% among informal OSPOs. While both structures report similar emphasis on advising best practices and overseeing license compliance, formal OSPOs appear more positioned to support broader strategic and ecosystem-facing roles.

When segmented by organizational size, the top five responsibilities reveal meaningful contrasts between small/medium-sized and large/very large organizations (Appendix A5). Larger organizations are significantly more likely to emphasize policy governance and license compliance: 62% report establishing and improving open source policies and processes as a top responsibility (vs. 12% of smaller organizations), and 52% highlight overseeing license compliance (vs. 24%). Smaller organizations, on the other hand, show stronger emphasis on community-facing activities. They are more likely to cite collaborating with open source organizations (44% vs. 28%) and advising on open source best practices (35% vs. 28%) as priorities. This suggests that, while larger organizations focus on institutionalizing open source through internal controls and strategy, smaller entities often rely on external engagement and lightweight practices to navigate the open source ecosystem.

Regional differences in OSPO responsibilities further illustrate how organizational context shapes open source priorities (Appendix A6). Asia-Pacific organizations are notably more externally oriented, with 46% citing collaboration with open source communities as a top responsibility, the highest among all regions. This suggests that, while American and European OSPOs focus on governance and risk management, Asia-Pacific organizations are currently leveraging OSPOs more as connectors to external ecosystems and shared innovation.

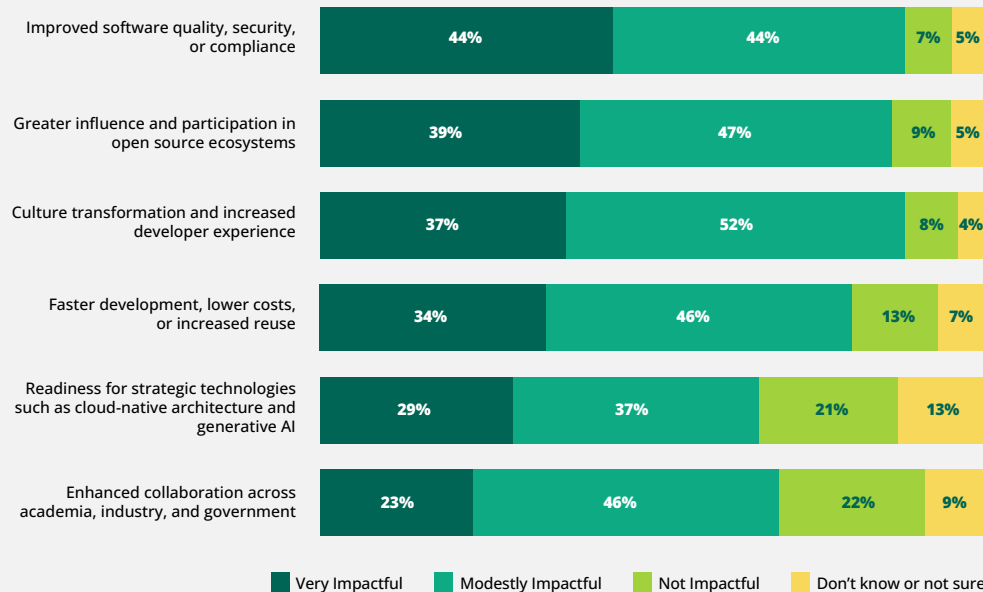# THE BENEFITS OF HAVING AN OSPO

The value of OSPOs is not only found in their operational responsibilities but also in the tangible outcomes they produce.

As Figure 12 shows, most respondents perceived the improvements in software quality, security, and compliance (88%) as the most impactful internal benefit of OSPOs. This outcome suggests that OSPOs serve not just as operational engines but as strategic enablers of long-term innovation.

"It's also encouraging to see that software quality, security, or compliance are key focuses for OSPOs, as this aligns with the focus of the wider OSS funding landscape that we see."

— Alice Sowerby, TODO Group Steering Committee Member and Former Program Director for Developer Relations at Equinix

Interestingly, while 86% perceived having a greater ecosystem influence, a lower rate perceived the cross-sector collaboration (69%) as an impactful benefit, pointing to future areas of growth.

ACHIEVED, ANTICIPATED, AND ASPIRATIONAL BENEFITS OF OSPOs

The contrast of perceived benefits becomes especially visible when examining how organizations at different stages of OSPO adoption perceive its potential impact. As illustrated in Figure 13, organizations that have already established an OSPO report consistently high levels of realized benefits. Key areas include improved developer experience and culture (89%); enhanced software quality, security, and compliance (88%); and greater ecosystem influence (86%), underscoring OSPOs' role in embedding open source best practices across engineering, legal, and community-facing efforts.

FIGURE 12

How impactful are the following outcomes of having an OSPO?

2025 OSPO Survey, Q19, sample size = 116, organizations that have an OSPO (formal or informal), sorted in descending order based on the sum of "Very impactful" and "Moderately impactful", DKNS excluded from analysis

	Very Impactful	Modestly Impactful	Not Impactful	Don't know or not sure
Improved software quality, security, or compliance	44%	44%	7%	5%
Greater influence and participation in open source ecosystems	39%	47%	9%	5%
Culture transformation and increased developer experience	37%	52%	8%	4%
Faster development, lower costs, or increased reuse	34%	46%	13%	7%
Readiness for strategic technologies such as cloud-native architecture and generative AI	29%	37%	21%	13%
Enhanced collaboration across academia, industry, and government	23%	46%	22%	9%

■ Very Impactful ■ Modestly Impactful ■ Not Impactful ■ Don't know or not sure

FROM CURIOSITY TO CONVICTION ACROSS THE OSPO ADOPTION SPECTRUM

Organizations that are planning to establish an OSPO show even stronger anticipation of strategic and cultural impact. All respondents in this group (100%) expect improvements in developer experience and culture (Figure 13).

Even among organizations without current OSPO plans, the data shows a foundational awareness of open source benefits. While their expectations are more modest, 41% considered software quality and security as one of their highest perceived benefits (Figure 13). These numbers suggest room for future growth in OSPO adoption as awareness spreads and the strategic value of open source becomes more widely recognized.

This growing recognition of open source value, whether fully realized or still aspirational, sets the stage for deeper organizational investment. As strategic benefits become more tangible and cultural awareness spreads, many organizations are moving beyond passive interest. The next step in this evolution is visible in a marked increase in long-term OSPO planning, with many entities laying the groundwork to formalize their open source engagement in the years ahead.

"The report once again underscores the substantial value that OSPOs bring to organizations by fostering upstream engagements, enhancing software quality, and driving cultural change. These elements are particularly crucial in addressing the demands of upcoming cybersecurity regulations, ensuring that organizations comply with regulatory requirements effectively and efficiently while sustaining a resilient and secure open source ecosystem."

— Georg Kunz, Open Source Program Manager, Ericsson
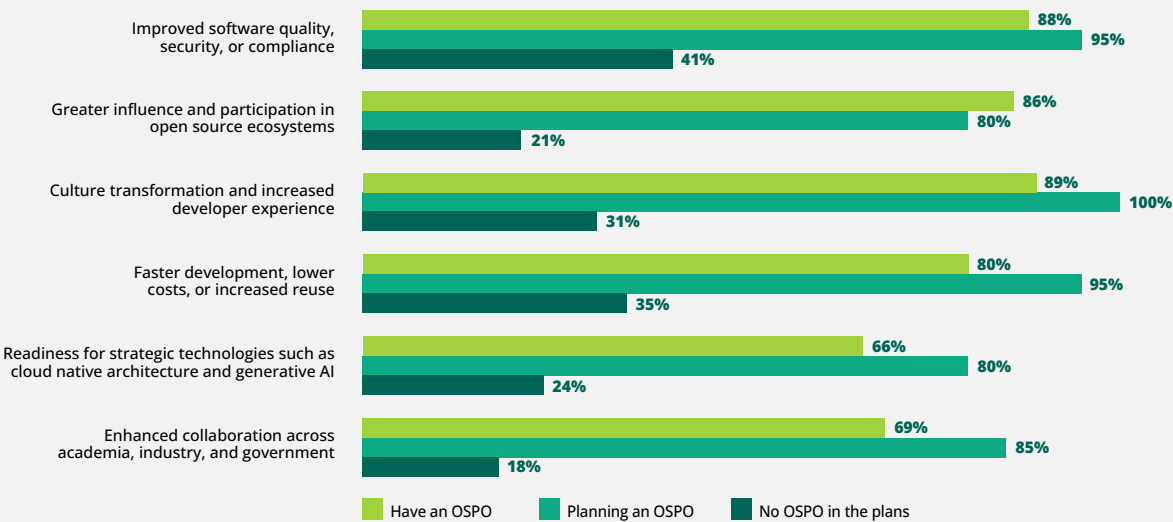

FIGURE 13

The perceived benefits of having an OSPO

Have an OSPO: 2025 OSPO Survey, Q19, sample size = 114, organizations that have an OSPO (formal or informal) that selected the benefit as "very impactful" or "moderately impactful"

OSPO in plans: 2025 OSPO Survey, Q30, sample size = 20, showing only organizations with OSPO plans, which selected the benefit outcome of having an OSPO as "very impactful" or "moderately impactful"

No OSPO in plans: 2025 OSPO Survey, Q36, sample size = 101, organizations with no plans to have an OSPO that marked the benefit as one their top three ways the organization would benefit from an OSPO

DKNS excluded from analysis

Benefit	Have an OSPO	Planning an OSPO	No OSPO in the plans
Improved software quality, security, or compliance	88%	95%	41%
Greater influence and participation in open source ecosystems	86%	80%	21%
Culture transformation and increased developer experience	89%	100%	31%
Faster development, lower costs, or increased reuse	80%	95%	35%
Readiness for strategic technologies such as cloud native architecture and generative AI	66%	80%	24%
Enhanced collaboration across academia, industry, and government	69%	85%	18%

Have an OSPO ◼ Planning an OSPO ◼ No OSPO in the plans

FROM INTENTION TO ACTION: TRENDS IN OSPO PLANNING

Compared to the previous year, organizations in 2025 show a clear shift toward longer-term OSPO planning. As shown in Figure 14, 28% of organizations plan to establish an OSPO in the next 1 to 2 years, over three times more than the 8% reported in 2024. Conversely, short-term plans (within six months) dropped significantly: only 24% of organizations in 2025 aim to launch an OSPO in that timeframe, compared to 58% in 2024. This trend could suggest delay in OSPO launch due to financial challenges or other factors. However, it could also suggest that OSPO adoption is becoming more deliberate and strategic, allowing organizations to align governance structures and stakeholder support before launch. Nearly half of organizations planning an OSPO (45%) expect to implement a formal reporting structure, and 35% plan to have dedicated staff, indicating a shift toward institutionalization (Appendix A7). However, 30% are still unsure about how their OSPO will be structured, reflecting organizational ambiguity or early planning stages.

"When organizations plan an OSPO, we have found that dedicating staff and establishing clear reporting lines isn't just a formality; it's the foundation for credibility, momentum, and real cultural change."
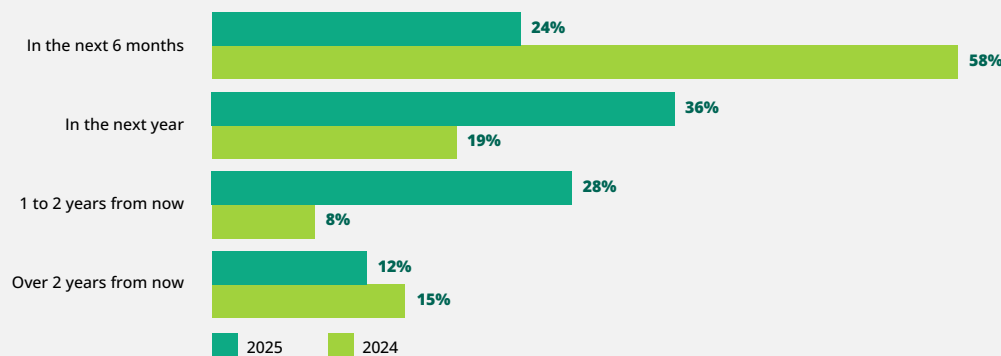
– Brittany Istenes, Open Source Strategist and TODO Group Steering Committee and FINOS Member

CLEARING THE PATH: ADDRESSING THE BARRIERS TO OSPO ADOPTION AND GROWTH

As noted in the previous section, many organizations are taking a longer-term, more strategic approach to OSPO adoption, often planning one to two years ahead and seeking structures with dedicated staff. This cautious pace reflects not only growing institutional interest but also recognition of the complex barriers OSPOs face at different stages. From planning through implementation to sustained operation, organizations encounter a variety of challenges that can shape or stall progress.

FIGURE 14

When does your organization plan to start an OSPO?

2025 OSPO Survey, Q27, sample size = 20, showing only organizations with OSPO plans, DKNS excluded from analysis

2024 OSPO Survey, Q41, sample size = 26, showing only organizations with OSPO plans, DKNS excluded from analysis

	2025	2024
In the next 6 months	24%	58%
In the next year	36%	19%
1 to 2 years from now	28%	8%
Over 2 years from now	12%	15%

To better understand what makes OSPO establishment difficult in practice, it is useful to evaluate the most impactful challenges reported by organizations planning an OSPO in 2024 compared to the same group in 2025 (see Figure 15).

Figure 15 reveals that, in 2025, the top challenges for organizations establishing an OSPO include knowing how to approach the strategy (40%), financially justifying the business model (35%), and obtaining executive buy-in (35%). Compared to 2024, there is a notable decline in visibility-related concerns, such as assessing open source use (just 5% in 2025, down from 35%), indicating growing organizational awareness and maturity. This shift suggests that, as open source becomes more embedded in corporate practice, the focus is turning toward how to formalize and sustain open source programs rather than simply justify them.

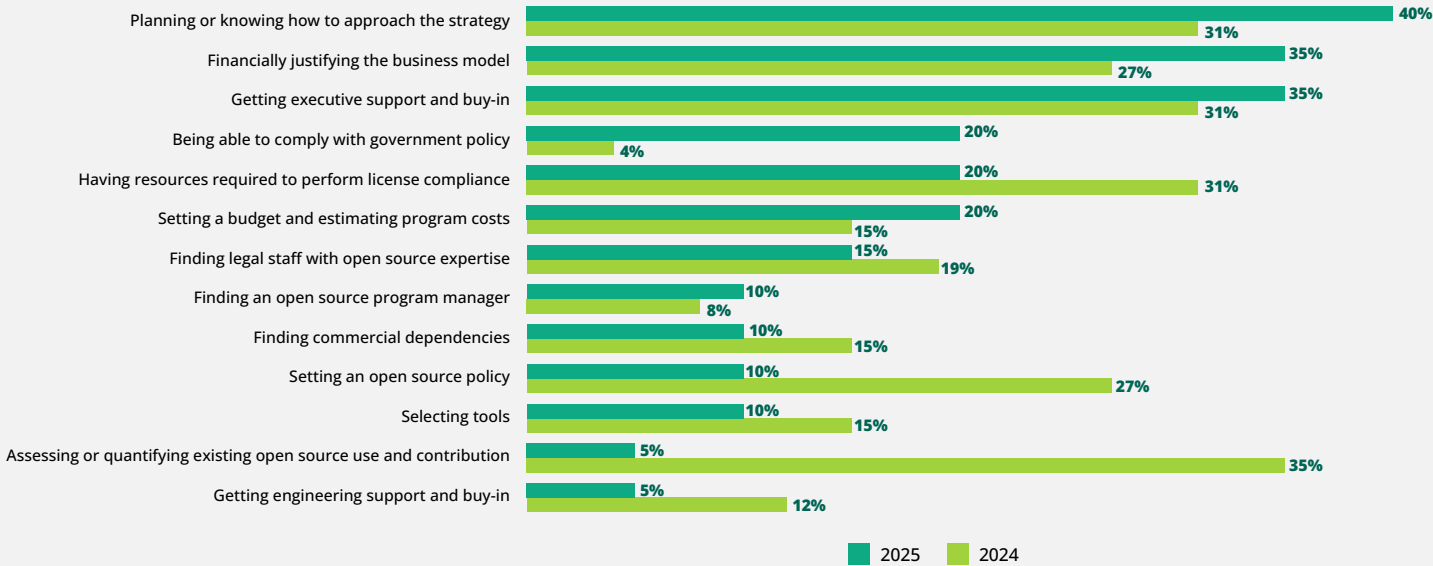## FROM LAUNCH TO LONGEVITY: WHAT IT TAKES TO SUSTAIN AN OSPO

While strategic clarity and executive buy-in dominate early OSPO planning hurdles, operational execution brings its own set of persistent constraints once an OSPO is in place. As Figure 16 shows, policy, process, and governance concerns remain highly pervasive, with 75% of OSPOs citing them as frequent or occasional obstacles, mirroring the strategic uncertainties

FIGURE 15

What have been the top three biggest challenges in establishing an OSPO?

2025 OSPO Survey, Q31, sample size = 20, showing only organizations with OSPO plans, DKNS excluded from analysis

2024 OSPO Survey, Q45, sample size = 26, showing only organizations with OSPO plans, DKNS excluded from analysis

Challenge	2025	2024
Planning or knowing how to approach the strategy	40%	31%
Financially justifying the business model	35%	27%
Getting executive support and buy-in	35%	31%
Being able to comply with government policy	20%	4%
Having resources required to perform license compliance	20%	31%
Setting a budget and estimating program costs	20%	15%
Finding legal staff with open source expertise	15%	19%
Finding an open source program manager	10%	8%
Finding commercial dependencies	10%	15%
Setting an open source policy	10%	27%
Selecting tools	10%	15%
Assessing or quantifying existing open source use and contribution	5%	35%
Getting engineering support and buy-in	5%	12%

reported by organizations in the early planning phase. Resourcing and staffing limitations emerge as the most frequent challenge for current OSPOs, flagged by 38% of respondents, reflecting the transition from high-level intent to the practical constraints of implementation. Visibility and executive support, which organizations already struggle to secure during the planning stage, continue to strain progress post-implementation, affecting 67% of existing OSPOs. These findings underscore that, while launching an OSPO is a significant milestone, sustaining and scaling it demands continued organizational investment, institutional alignment, and active executive backing, the same foundations that planners are only beginning to establish.

When persistent challenges—such as limited resourcing, governance friction, or insufficient executive support—go unaddressed, some organizations reported scaling back or shutting down their OSPOs altogether. Among the few organizations that have dismantled or scaled back their OSPOs (Appendix A8), the most common outcome has been redistribution rather than elimination of open source work. In 40% of cases, organizations reassigned program duties across engineering teams. The people impact is equally significant: 40% of respondents said they no longer cover OSPO responsibilities as part of their role, and 20% experienced job loss following dissolution.

Together, these challenges offer a clear path forward. While OSPOs may face structural or resourcing hurdles, they are not inherently fragile. With a thoughtful mix of policy design, compliance management, contributor enablement, and ongoing investment, organizations can build OSPOs that not only survive but mature into strategic assets. The message is clear: Organizations willing to commit to sustaining their OSPOs will be better positioned to harness the full benefits of open source over time.

FIGURE 16

How often does your OSPO face the following challenges?

2025 OSPO Survey, Q20, sample size = 116, organizations that have an OSPO (formal or informal), sorted in descending order based on the sum of "Frequently" and "Sometimes", DKNS excluded from analysis

Challenge	Frequently	Sometimes	Rarely
Process, policy, and governance policies	30%	45%	15%
Legal and security compliance processes, monitoring, or remediation	25%	47%	17%
Visibility, influence, or executive support	29%	38%	24%
Resourcing and staffing budget limitations	38%	28%	20%
Recruiting and onboarding contributors	24%	35%	26%
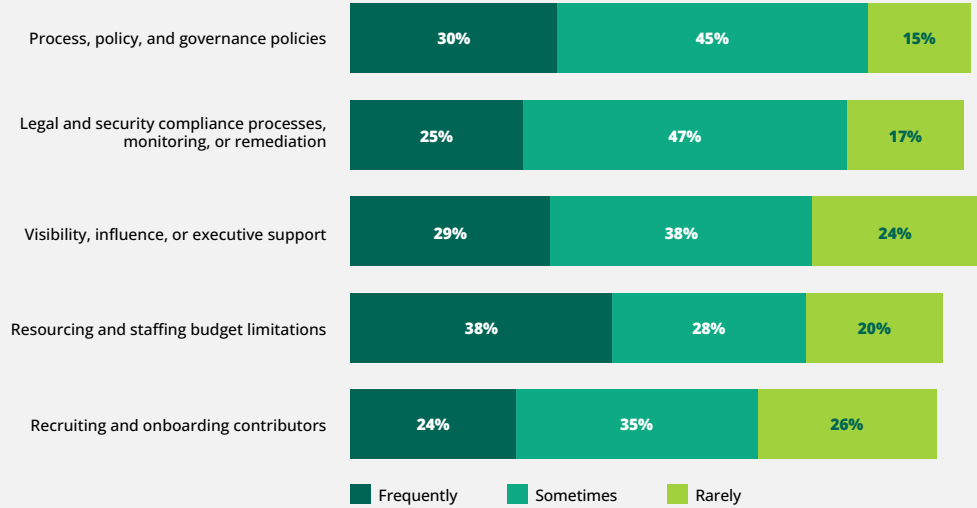
AVOIDING OSPOs DISSOLUTION: THE PRACTICES TO SUSTAIN OSPOs

The risks of OSPO dissolution and the persistent challenges reported by current OSPOs serve as a cautionary tale: Establishing an OSPO is only the beginning. Sustaining it requires intentional practices, continuous investment, and strategic alignment. Encouragingly, the 2025 data shows that many organizations are responding to these risks with increased attention to long-term sustainability. As Figure 17 shows, nearly half (47%) of OSPOs in 2025 report always or frequently engaging in practices aimed at long-term sustainability, up significantly from 33% in 2024. This trend points to a growing awareness across organizations that they must not only launch OSPOs but continuously support them for them to thrive. While another 37% engage in such practices at least sometimes, only 15% reported rarely or never doing so,

signaling broad organizational prioritization of OSPO longevity.

In response to questions about the specific practices used to ensure OSPO sustainability, organizations reveal a clear trend toward institutionalizing open source through formal governance and accountability mechanisms. As Figure 18 shows, nearly half (49%) of OSPOs have implemented internal procedures to ensure compliance with open source licenses and regulations, signaling that sustainability begins with clear rules and internal oversight. Beyond that, 36% work closely with legal teams, integrating open source into broader corporate risk strategies, while 35% have moved toward data-driven transparency, tracking and reporting open source activity across the organization.

> "Sustaining an OSPO isn't optional—it's a commitment we actively see translate into consistent code quality, compliance, security, and innovation. Long-term practices and dedicated resources are what turn open source efforts into lasting impact."
>
> — Brittany Istenes, Open Source Strategist and TODO Group Steering Committee and FINOS Member

FIGURE 17

How often does your OSPO work on practices to sustain itself?

2025 OSPO Survey, Q24, sample size = 123, organizations that have an OSPO (formal or informal)
2024 OSPO Survey, Q38, sample size = 100, organizations that have an OSPO (formal or informal)

	2025	2024
Always or frequently	47%	33%
Sometimes	37%	43%
Rarely or never	15%	15%

FIGURE 18

What are the top three practices you follow to ensure the sustainability of your OSPO?

2025 OSPO Survey, Q25, sample size = 123, organizations that have an OSPO (formal or informal)

Practice	%
Establish internal procedures to ensure compliance with open source licenses and regulations	49%
Work closely with the legal department to manage risks associated with open source licenses and intellectual property	36%
Measure and report on open source activity within the organization	35%
Keep regular communication and collaboration within and across teams and departments	29%
Identify and empower internal champions who can advocate for open source within their respective departments	23%
Give employees the freedom to innovate	16%
Prepare courseware for onboarding, on-demand, and annual compliance trainings	15%
Participate in funding proposals	14%
Maintain team motivation through constant recognition	9%
Invest in talent and resources to drive open source initiatives	7%
Source diverse talent from various successful open source projects and countries	5%

FIGURE 19

What are the top three practices your OSPO works on to improve the sustainability of open source projects?

2025 OSPO Survey, Q26, sample size = 123, organizations that have an OSPO (formal or informal)

Practice	%
Having policies in place to enable open source contributions	54%
Educating developers to contribute to open source projects	46%
Advising on license options	42%
Providing infrastructure for use on open source projects	28%
Identifying community and project health risks	26%
Advising the organization on the best ways to provide funding- or launching-related initiatives	25%
Providing employees time and/or an economic incentive to contribute to third-party open source projects	19%

Taken together, these practices reflect more than just operational rigor; they point to a maturing mindset where organizations no longer treat open source as a peripheral initiative. Instead, they are embedding it into enterprise-wide governance, compliance, and reporting frameworks. This shift marks a strategic inflection point: Organizations are not just protecting themselves from risk; they are laying the foundation for long-term resilience and credibility in how they engage with open source communities and ecosystems.

Beyond risk and compliance, improving OSPO sustainability also depends on enabling participation and education. According to Figure 19, developers' education plays a key role: 46% of OSPOs invest in educating their developers on how to contribute to open source projects, and 42% provide guidance on license options. These efforts reflect a proactive approach. Rather than relying on top-down mandates or direct funding incentives, OSPOs are empowering internal contributors and strengthening the cultural and procedural foundations of open source involvement.
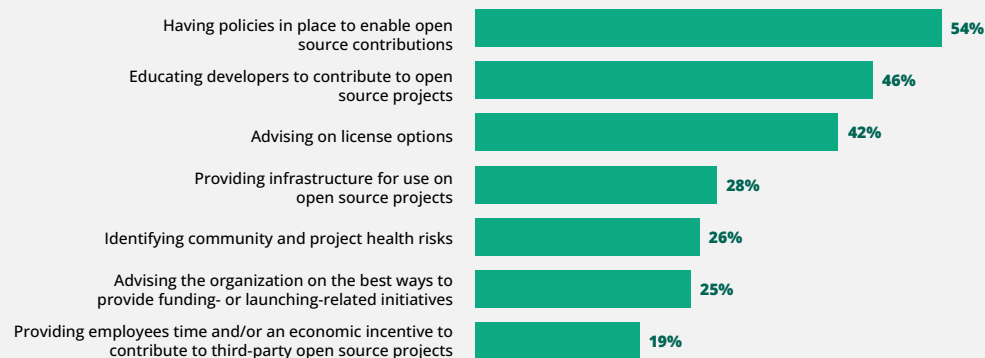
ACADEMIC OSPOs

While many OSPOs operate in corporate settings, academic institutions are also recognizing the value of structured open source engagement. Academic institutions are embracing OSPOs as strategic engines for open source skill development and research impact. While we actively sought to include academic institutions in our survey, we received a limited number of responses, resulting in a sample size of only 13. Given that academic OSPOs represent a niche yet important segment of the broader OSPO landscape, we chose to include their perspectives in our analysis. However, readers should interpret these findings with caution due to the small sample size.

As Appendix A10 shows, academic OSPOs are most commonly situated in research centers (38%), followed by libraries and technology transfer offices (25% each), reflecting their close ties to both innovation infrastructure and knowledge dissemination functions. Rather than focusing on compliance or infrastructure, academic OSPOs prioritize internal capacity-building. Education and training (77%) and open source advocacy (62%) dominate their responsibility landscape, far surpassing legal oversight (15%) or tool support (23%) (see Appendix 11). This indicates a strong orientation toward culture change and developer empowerment within academia.

The benefits of OSPOs are highly impactful in academia, particularly in the realm of education and knowledge dissemination—two critical outcomes for academic institutions. As Figure 20 illustrates, 92% of respondents rated increased OSS skills and competency as impactful (77% "Very," 15% "Moderately"), making talent development the most widely perceived strength of academic OSPOs. Additionally, 77% reported that these programs are impactful in translating open source research into practical outcomes. However, broader impacts such as an increased number of OSS projects and organizational-level results (e.g., spinouts) remain less prominent, with just 15% rating them as very impactful.

Notably, a sizable portion of respondents expressed uncertainty about these broader outcomes, with 38% selecting "Don't know or not sure" for both project growth and organizational impact. This hesitation may reflect the early stage of many academic OSPOs or a lack of formal impact tracking. Nevertheless, the consistently high ratings in skills development and research translation reinforce the role of academic OSPOs as catalysts for capacity building, ecosystem engagement, and educational innovation, even as they continue to define and expand their institutional value.

FIGURE 20

How impactful are the following outcomes of having an OSPO?

2025 OSPO Survey, Q23, sample size = 13, organizations that have an academic OSPO

	Very Impactful	Modestly Impactful	Not Impactful	Don't know or not sure
Increased OSS skills and open source competency	77%	15%		8%
Open source research translation	48%	31%		23%
Increased number of OSS projects	15%	46%		38%
Open source fmpact for organization (e.g, spinout COSS company)	15%	38%	8%	38%
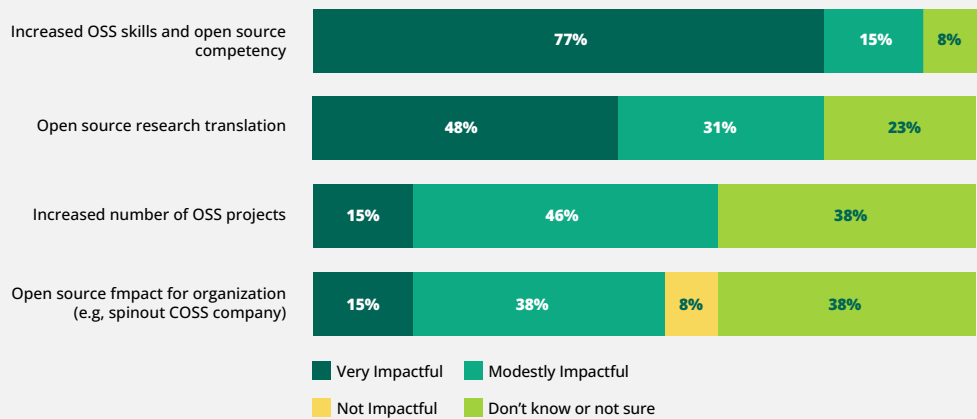
CONCLUSION

The 2025 OSPO Survey reveals a maturing global landscape for OSPOs, marked by growing formalization, strategic alignment, and a heightened focus on sustainability. While interest in OSPOs remains steady, our findings make it clear that planning alone is not enough; success depends on sustained investment and cross-functional commitment beyond the initial roadmap. Effective implementation and long-term resilience demand structural investment, cross-functional governance, and executive sponsorship. Key recommendations include the following:

POSITION OSPOS AS GOVERNANCE HUBS FOR EMERGING TECHNOLOGIES.

OSPOs are increasingly called upon to manage risk beyond licensing. 79% are rated effective in managing generative AI risks, and 66% report readiness for cloud-native and AI infrastructure. Organizations may expand OSPO mandates to include AI policy guidance, AI-generated code compliance, and collaboration with risk, legal, and platform teams.

STRENGTHEN SECURITY STRATEGY THROUGH OSPO INVOLVEMENT.

92% of OSPOs are involved in open source security, with 42% playing a decision-making role. Embedding OSPOs early in the software development lifecycle enables scalable security practices, reduces exposure, and ensures alignment with regulations such as the E.U. Cyber Resilience Act.

MOVE BEYOND LAUNCH—INVEST IN LONG-TERM SUSTAINABILITY.

Nearly half (47%) of OSPOs reported always or frequently engaging in sustainability practices, up from 33% in 2024. This growing attention reflects not just operational maturity but also the rising pressure to demonstrate impact. Organizations must embed practices such as compliance procedures (49%), legal risk governance (36%), and internal reporting (35%) to sustain their OSPOs long term.

ENABLE CONTRIBUTIONS THROUGH EDUCATION AND INTERNAL POLICY.

Rather than relying solely on financial incentives, successful OSPOs prioritize enabling participation through internal policies (54%) and developer education (46%). These structures help build a culture of contribution and reinforce open source as a shared ownership of open source responsibilities across the organization's team units.

LEARN FROM DISSOLVED OSPOS—RECOGNIZE THAT SUSTAINABILITY MUST BE BUILT, NOT ASSUMED.

Among organizations that dissolved or downsized OSPOs, 40% redistributed responsibilities across engineering teams, while 20% terminated activities entirely. These transitions were not without consequences; 40% of affected individuals no longer held OSPO responsibilities, and 20% faced layoffs. Sustainability must be proactively built, not assumed.

LEVERAGE OSPOS AS CROSS-FUNCTIONAL BRIDGES.

Mature OSPOs align open source with organizational priorities. OSPOs operate at the intersection of compliance, developer enablement, and external engagements with open source ecosystems. Beyond governance, they play a critical role in bridging departments and aligning open source efforts across technical and strategic domains. Over one-third of survey respondents report cross-team collaboration and internal champions as key to sustaining impact. Aligning OSPOs with platform, legal, and AI governance teams increases agility and relevance.

RECOGNIZE THE UNIQUE VALUE OF ACADEMIC OSPOS.

Academic institutions are increasingly embracing OSPOs as engines for skill development and research translation. With 92% of respondents rating increased OSS skills as impactful and 77% recognizing research translation benefits, academic OSPOs serve as vital catalysts for ecosystem readiness and student workforce development.

PROJECT SPOTLIGHT

CLOUD NATIVE
COMPUTING FOUNDATION

The Cloud Native Computing Foundation (CNCF) supports and promotes OSPOs in the cloud native ecosystem. CNCF facilitates community interactions through initiatives such as the OSPO Birds of a Feather sessions at events such as KubeCon + CloudNativeCon. These sessions offer a platform for OSPO professionals to discuss challenges and share best practices.

In collaboration with the Talk Openly Develop Openly (TODO) Group, the CNCF conducts annual OSPO surveys, providing insights into industry trends and challenges. The community-driven OSPO Book Project compiles valuable insights from practitioners, creating a comprehensive industry resource.

The 2024 survey revealed **91% of OSPOs are involved in managing security issues,** highlighting the growing importance of structured open source management.

The CNCF's mentoring programs, such as the LFX platform, Google Summer of Code, and Outreachy, supported over 147 individuals in 2024. These initiatives foster talent and contribute to the sustainability of the open source ecosystem.

The CNCF emphasizes security by partnering with organizations such as the Open Source Technology Improvement Fund. Regular security audits, including fuzzing audits, ensure robust security practices within CNCF projects.

PROJECT SPOTLIGHT

FOSSID

FROM AI CODE TO GLOBAL COMPLIANCE: HOW FOSSID FUTURE-PROOFS YOUR OSPO

OSPOs are facing mounting pressure to maintain license compliance, deliver auditable Software Bills of Materials (SBOMs), and protect their organizations from hidden software risks—especially as AI-generated code becomes mainstream in the development lifecycle. FossID is enabling OSPOs to confidently manage open source usage at scale while supporting developers, legal teams, and executive stakeholders alike.

As AI coding assistants become more prevalent in software development, OSPOs must grapple with a growing risk: inadvertent inclusion of license-restricted or copyrighted code in AI-assisted output. Typical Software Composition Analysis (SCA) tools often overlook these risks due to limited precision and accuracy in snippet detection. FossID stands apart with unmatched snippet detection capabilities, identifying open source code fragments as small as six lines. This granularity is crucial for detecting reused code snippets from AI outputs that lack clear provenance.

Coupled with FossID's comprehensive open source knowledge base, covering over 200 million components and more than 2,500 licenses, OSPOs catch subtle license compliance issues before they escalate. This breadth of coverage and depth of intelligence leads to a great need for automation. FossID's ID Assist technology streamlines the audit process by auto-identifying the most likely component match, reducing false positives and investigation time.

GENERATING COMPLETE, AUDIT-READY SBOMS

In highly regulated sectors such as automotive, aerospace, medical devices, and consumer electronics, incomplete or inaccurate SBOMs can delay product certification and introduce legal exposure. FossID delivers full visibility into your software supply chain, producing accurate, machine-readable SBOMs.

OSPOs can generate the most reliable and complete SBOMs and include detailed metadata: component names, versions, licenses, and copyrights and VEX security context, as well as dependency relationships. This level of precision supports internal governance, customer requirements, and evolving global regulations such as the U.S. Executive Order on Cybersecurity and the E.U. Cyber Resilience Act.

AUTOMATING LICENSE AND COPYRIGHT NOTICE FILES

Embedded systems manufacturers often distribute software under complex combinations of permissive, reciprocal, and proprietary licenses. Manually generating accurate notice files for each release is error-prone and time-consuming. FossID automates this process by extracting license and copyright information directly from detected components, enabling OSPOs to generate compliant, product-specific notice files. This is particularly critical for organizations with global product lines subject to multi-jurisdictional compliance obligations. With FossID, OSPOs can ensure that every notice file is complete, traceable, and defensible, no matter how complex the software supply chain.

SCALABLE COMPLIANCE FOR COMPLEX CODEBASES

Whether managing millions of lines of C/C++, legacy codebases in embedded systems, or modern CI/CD pipelines in connected products, FossID helps OSPOs scale compliance without impeding development. Take a self-guided tour of FossID at **www.fossid.com/tour**.

PROJECT SPOTLIGHT

FinOps Foundation

The mission of the **FinOps Foundation** is to advance the people who manage the value of cloud by creating connections, inspiring growth, and empowering best practices. The Foundation does this through several programs:

Global Community

The 85,000+ strong **global FinOps community** comprises practitioners and SMEs across regions and industries, connecting to exchange knowledge, share best practices, and collectively advance the discipline of FinOps. The community collaborates and builds connections through various activities like topic based community calls, regional meetups, virtual summits and Slack forums.

FinOps Framework

The **FinOps Framework** offers building blocks for a successful FinOps practice. The Framework is flexible, non-prescriptive, and has been iteratively developed from real-world practitioner experiences through community Working Groups. It encompasses principles, scopes, personas, measures of success, maturity characteristics, and functional activities in a common language that reflects how successful practices drive value from cloud and technology spend.

FinOps Certifications

Structured FinOps training and certifications help practitioners and SMEs advance their FinOps knowledge and enhance professional credibility. From foundational best practices to specialized topics like **FinOps for AI**, these certifications validate the skills to support career advancement in an evolving discipline.

FOCUS 1.2

FOCUS™ (FinOps Open Cost and Usage Specification) is an open specification that normalizes cost and usage datasets across cloud vendors and reduces complexity for FinOps practitioners. The latest FOCUS 1.2 release includes SaaS/PaaS support, invoice reconciliation, and deeper cloud allocation.

State Of FinOps 2025

The **State of FinOps** is the annual report highlighting practitioners' key priorities, industry trends, and the direction of the FinOps practice. The results from the survey inform a range of Foundation activities and tell the broader market how FinOps is practiced in various organizations.

FinOps X

FinOps X is the annual conference that gathers the community together and focuses on emerging best practices, technical deep dives, and real-world experiences from industry leaders. Attendees develop valuable community connections and build knowledge to help their organizations manage the value from cloud and other areas of technology spend.

Join the FinOps Foundation community at **www.finops.org**.

METHODOLOGY AND DEMOGRAPHICS

ABOUT THE SURVEY

A web survey that Linux Foundation Research and its partners conducted from May to June 2025 provided the basis for this study. The survey's goal was to understand organizational adoption of OSPOs or similar initiatives, their primary responsibilities, and their impacts on the organization. In this section, we present the study methodology and context regarding how we analyzed the data, followed by the demographics of the respondents.

We sourced our usable sample from Linux Foundation subscribers, members, partner communities, and social media. We addressed data quality through extensive prescreening, survey screening questions, and data quality checks to ensure that respondents had sufficient professional experience to answer questions accurately on behalf of the organization they worked for.

We collected survey data from industry-specific companies; IT vendors and service providers; and nonprofit, academic, and government organizations. Respondents spanned many vertical industries and companies of all sizes, and we collected data from several geographies, including the Americas, Europe, and Asia-Pacific.

The 2025 OSPO survey comprised 36 questions that addressed screening, respondent demographics, the impact of the OSPO within the organization, and specific questions to those organizations that are planning an OSPO, that have a dissolved or restructured OSPO, or that do not have an OSPO. For information about access to the 2025 OSPO Survey, its dataset, and survey frequencies, see the data.world access information below. Figure 21 shows the high-level design of the survey.

Survey screening involved the use of three variables to validate the respondent:

- Must work full-time or part-time in the information technology field

- Must work for an organization involved with open source software at any level

- Must understand the status of OSPOs and open source involvement within the organization

FIGURE 21

Survey Design

Pages	Questions	Question categories	Who answers the questions
P1		Introduction	All respondents
P2	Q1–Q3	Tell us about yourself.	All respondents (n = 338)
P3	Q4–Q7	Tell us about your organization.	All respondents (n = 338)
P4–P6	Q8–Q10	Tell us about your organization's OSS policy.	All respondents (n = 338)
P7–P8	Q11–Q17	Tell us about the OSS program or initiative.	Respondents with OSPO (not academic) (n = 116)

Pages	Questions	Question categories	Who answers the questions
P8	Q18	Where was the OSPO located before reorganization?	Respondents with OSPO that was reorganized (not academic) (n = 32)
P8	Q19–Q20	OSPO impact	Respondents with OSPO (not academic) (n = 116)
P9	Q21–Q23	Tell us about the OSS program or initiative.	Respondents with OSPO and academic (n = 13)
P10	Q24–Q26	OSPO and OSS sustainability	Respondents with OSPOs (academic or not) (n = 123)
P11	Q27–Q31	OSPO plans	Respondents with OSPO plans (n = 20)
P12	Q32–Q34	Reduced or dissolved OSPO	Respondents with reduced or dissolved OSPO plans (n = 5)
P13	Q35–Q36	No OSPO plans	Respondents with no OSPO or OSPO plans (n = 101)
P14	Q37–Q39	Optional closing questions	All remaining respondents

DATA.WORLD ACCESS

LF Research makes each of its empirical project datasets available on data.world (http://data.world/thelinuxfoundation). This dataset includes the survey instrument, raw survey data, screening and filtering criteria, and frequency charts for each question in the survey. Access to Linux Foundation datasets is free but does require you to create a data.world account.

RESPONDENT DEMOGRAPHICS

Figure 22 presents the respondent demographics from the 2025 OSPO Survey. Most participants are developers (36%), followed by other IT and security positions (20%). Respondents represent a broad range of organization types, with 35% working at hardware/software vendors or suppliers; 23% from government, foundations, or academia; and 22% from consulting or managed service providers. The survey includes organizations of all sizes: 30% of respondents work at companies with more than 10,000 employees, 22% at mid-sized organizations (1,000 to 9,999), and
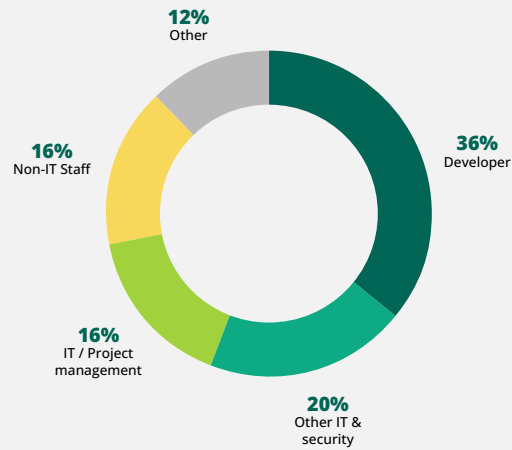
26% at small companies with fewer than 50 employees. Geographically, the majority are based in the Americas (39%) and Europe (38%), with smaller representation from Asia-Pacific (16%) and the Rest of the World (7%). In response to questioning about OSPO presence, 42% of respondents said their organization has an OSPO (27% formal and 15% informal), 34% do not have an OSPO and have no plans to establish it, 7% are planning to establish an OSPO, and 2% had an OSPO in the past.

Some demographics have been regrouped to facilitate a more insightful analysis. For the original source data and study frequencies, please see the data.world dataset and access as described above.

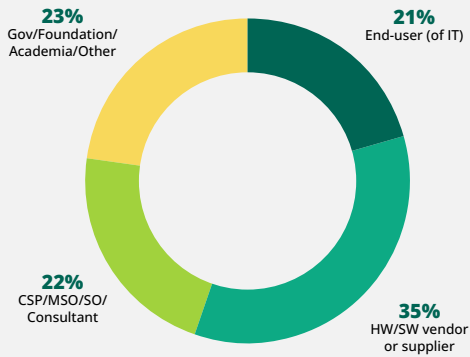## FIGURE 22: RESPONDENT DEMOGRAPHICS
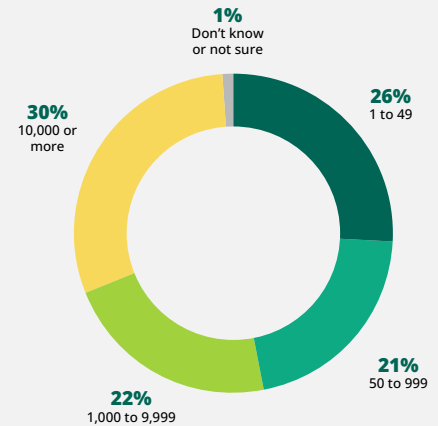
Respondent Role
2025 OSPO Survey, Q4, Sample Size = 338

- 12% Other
- 16% Non-IT Staff
- 16% IT / Project management
- 20% Other IT & security
- 36% Developer

Type of Organization
2025 OSPO Survey, Q7, Sample Size = 338

- 23% Gov/Foundation/Academia/Other
- 21% End-user (of IT)
- 35% HW/SW vendor or supplier
- 22% CSP/MSO/SO/Consultant

Company size (employees)
2025 OSPO Survey, Q5, Sample Size = 338

- 1% Don't know or not sure
- 26% 1 to 49
- 21% 50 to 999
- 22% 1,000 to 9,999
- 30% 10,000 or more

Geographic Region of Headquarters
2025 OSPO Survey, Q6, Sample Size = 338

- 7% Rest of World
- 16% Asia-Pacific
- 39% The Americas
- 38% Europe
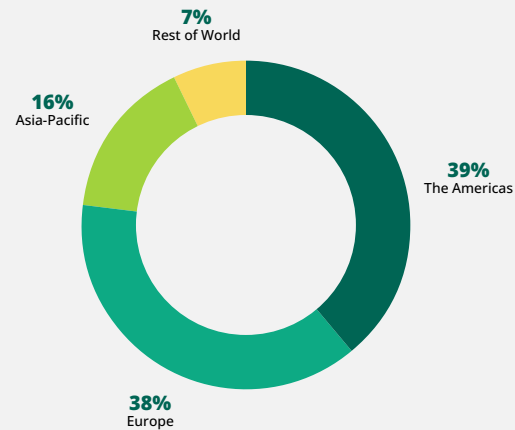
Does organization have an OSPO?
2025 OSPO Survey, Q12, Sample Size = 338

- 16% Don't know or not sure
- 27% Yes, formally structured
- 15% Yes, informally structured
- 7% No, but it is in planning
- 2% No, but had in the past
- 34% No
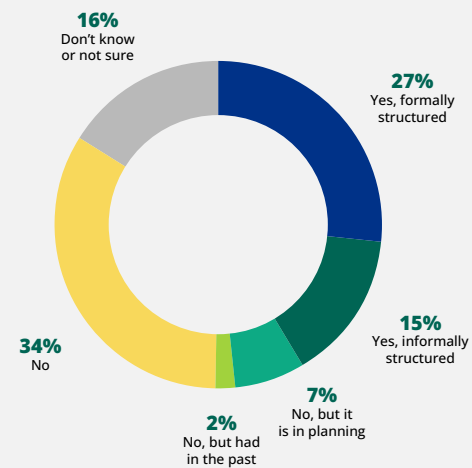
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BIANCA TRINKENREICH is an assistant professor of Computer Science at Colorado State University and a research analyst at LF Research. Her research on software engineering and open source software has resulted in several awards in top-tier venues. She serves on the program committees of renowned conferences and as both a reviewer and editor for several journals. Dr. Trinkenreich has a Ph.D., a master's in informatics, and a BS in computer science. She also has more than 20 years of IT industry experience. For more information, visit biancatrink.github.io.

ADRIENN LAWSON serves as Director of Quantitative Research at The Linux Foundation, where she leads data-driven initiatives to understand open source ecosystems. With expertise in social data science from the University of Oxford and a background spanning academic and governmental research, she brings methodological rigor to analyzing distributed collaboration networks. At the Linux Foundation, Adrienn leads a team conducting cross-sectional research across industry verticals and geographic regions to provide comprehensive insights into open source dynamics. Her work encompasses empirical investigations into regulatory compliance, the implications of AI, and sustainable funding models. She produces evidence-based recommendations that inform strategic decision-making within the open source community.

ACKNOWLEDGMENTS

APPENDIX

APPENDIX A1

Which of the following best describes your organization's formal policy on contributing to upstream open source projects?

(select one) by region

	Americas	Europe	Asia-Pacific
Contribution is openly encouraged	47%	41%	32%
Contribute if it is required by the open source license	14%	16%	10%
Contributions are not permitted	4%	6%	11%

2025 State of OSPO, Q10/Q6, sample size = 337, Rest of the World and DKNS excluded from analysis

APPENDIX A2

Does your organization currently have, or has it ever had, an OSPO or a similar open source initiative?

(select one) by region

	Americas	Europe	Asia-Pacific	Rest of the World
Yes, and it is formally structured with dedicated person-hours, reporting structure, and/or job titles.	29%	22%	37%	17%
Yes, and it is informally structured (e.g., part-time, virtual).	17%	14%	13%	11%
Not currently, but we are planning one.	7%	9%	4%	11%
Not currently, but we had one in the past.	1%	2%	2%	0%
No, and we never had one.	33%	34%	29%	56%

2025 OSPO Survey, Q10/Q5, sample size = 337

APPENDIX A3

Does your organization currently have, or has it ever had, an OSPO or a similar open source initiative?

(select one) by q0005rv1: How many people work for your organization? (grouped) filtered by Asia-Pacific

	Small and Medium-Sized Organizations	Large and Very Large Organizations
Yes, and it is formally structured with dedicated person-hours, reporting structure, and/or job titles.	18%	50%
Yes, and it is informally structured (e.g., part-time, virtual).	18%	10%
Not currently, but we are planning one.	0%	7%
Not currently, but we had one in the past.	5%	0%
No, and we never had one.	55%	10%

2025 OSPO Survey, Q10/Q5 filtered by Asia-Pacific, sample size = 52

APPENDIX A4

What are the top three responsibilities of your OSPO?

by having an OSPOs filtered by the top five most cited responsibilities

	Formal OSPOs	Informal OSPOs
Advise on open source best practices	31%	29%
Collaborate with open source organizations and communities	39%	22%
Develop and execute open source strategy	39%	24%
Establish and improve open source policies and processes	57%	29%
Oversee open source license compliance	44%	44%

2025 OSPO Survey, Q16/Q10, filtered by organizations that have formal or informal OSPOs, sample size = 116

What are the top three responsibilities of your OSPO?

by organization size (grouped), filtered by the top five most cited responsibilities

	Small and medium-sized organizations	Large and very large organizations
Advise on open source best practices	35%	28%
Collaborate with open source organizations and communities	44%	28%
Develop and execute open source strategy	26%	37%
Establish and improve open source policies and processes	12%	62%
Oversee open source license compliance	24%	52%

2025 OSPO Survey, Q16/Q5, sample size = 116, valid cases = 116, total mentions = 334

What are the top three responsibilities of your OSPO?

by region (grouped) filtered by the top five most cited responsibilities

	Americas	Europe	Asia-Pacific
Advise on open source best practices	28%	33%	33%
Collaborate with open source organizations and communities	26%	33%	46%
Develop and execute open source strategy	38%	28%	29%
Establish and improve open source policies and processes	52%	51%	38%
Oversee open source license compliance	38%	51%	46%

2025 OSPO Survey, Q16/Q5, sample size = 113, valid cases = 113, total mentions = 326, Rest of the World not included

How will the OSPO be formally structured?

Reporting structure	45%
Dedicated staff	35%
New job titles	20%
Other (please specify)	5%
Don't know or not sure	30%

2025 OSPO Survey, Q28, sample size = 20, showing only organizations with OSPO plans

Was the dissolution a complete termination, or was open source responsibility redistributed?

(select all that apply)

Responsibilities distributed across engineering teams	40%
Complete termination of open source program activities	20%
Consolidated into a smaller initiative	20%
Absorbed into another department (e.g., legal, engineering, DevRel)	0%
Other (please specify)	40%
Don't know or not sure	0%

2025 OSPO Survey, Q34, sample size = 6

What were the consequences of dissolving or reducing your OSPO?

(select one)

I no longer cover OSPO responsibilities as part of my role in the organization	40%
I was laid off from my job	20%
Other (please specify)	40%
Don't know or not sure	0%

2025 OSPO Survey, Q32, sample size = 6

Where is the OSPO located within the organization? If the effort is informal, answer based on who the primary organizers report to.

(select one)

Research center	38%
Library	25%
Technology transfer office	25%
Central IT	13%
Faculty department	0%
Center of excellence	0%

2025 OSPO Survey, Q21, sample size = 13, organizations that have an academic OSPO, others and DKNS excluded from analysis

What are the top three responsibilities of the OSPO?

(select up to three responses)

Education and training within the organization	77%
Open source advocacy within the organization	62%
Open source policy within the organization	38%
Working with external partners and open source communities and foundations	31%
Community building	31%
Tools and infrastructure to support OSS adoption within the organization	23%
Oversee open source license compliance	15%
Working with other departments	8%
Direct support arm of OSS project teams	8%

2025 OSPO Survey, Q22, sample size = 13, organizations that have an academic OSPO, Others and DKNS excluded from analysis

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TODO

TODO is the largest global open community of practitioners who aim to create and share knowledge, collaborating on best practices and tools to leverage open source management operations for inside organizations through the establishment and continuation of OSPOs. todogroup.org

CLOUD NATIVE COMPUTING FOUNDATION

Cloud native computing leverages an open source software stack to deploy applications as microservices, where each component is packaged into its own container and orchestrated dynamically to optimize resource utilization. The Cloud Native Computing Foundation (CNCF) hosts key projects within the cloud native ecosystem, including Kubernetes, Envoy, Prometheus, and many others. CNCF serves as a neutral hub for collaboration, bringing together leading developers, end users, and vendors—from the world's largest public cloud providers and enterprise software companies to innovative startups. As part of The Linux Foundation, a nonprofit organization, CNCF fosters the growth and adoption of cloud-native technologies across industries. For more information, visit www.cncf.io.

THE LINUX FOUNDATION | Research

Founded in 2021, Linux Foundation Research explores the growing scale of open source collaboration, providing insight into emerging technology trends, best practices, and the global impact of open source projects. By leveraging project databases and networks and committing to best practices in quantitative and qualitative methodologies, Linux Foundation Research is creating the go-to library for open source insights for the benefit of organizations worldwide.