Evolving Compliance Needs in Acquisitions – Case Study

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About Me

• Director of Open Source @WD

• Director at large, Linux Foundation BOD

• MS in CS, MBA in Entrepreneurship

• Contributing to Open Source since 1998

• President of Women’s Innovation Network

• Passionate about opening doors in open source
WD – Industry Leading Data Storage Portfolio

**Client Devices**
- Notebook / desktop HDD
- Consumer electronics HDD
- Client SSD
- Embedded, components

**Client Solutions**
- Branded HDD
- Branded flash
- Removable products

**Datacenter Devices**
- Enterprise HDD
- Enterprise SSD

**Datacenter Solutions**
- Datacenter systems and platforms
- Related software and solutions
Western Digital Acquisitions

How we got here

[Diagram showing acquisitions over time]
Integration Philosophy – If It Ain’t Broke...

Discover & Leave It Alone
OSS Integration Not Top Priority
Current Processes Work

Prioritize Strategy & Patents

Unify
Identify areas of merger
Boards, tools, policy, process

Coordinate
Three Different Stages of Engagement - Open Source

Used with permission from Samsung Open Source Group: http://www.slideshare.net/SamsungOSG/developing-oss-leadership-linuxcon-na-
What Each Company Had

Many Common Elements

- Policy
- OSRB
- Scanning Tools
- Training
- Legal Experts

- Policy,
- FOSS Board
- Scanning Tool
- Training
- Legal Experts

- Policy
- OSWG, OS Steering
- Scanning Tool
- Training
- Legal Experts
Different OSS Postures
Driven by individual histories

**Western Digital (WD)**
- Compliance focused, risk averse, defensive
- Consumer, Research teams – OSS use
- OSRB
- HDD Chair

**HGST**
- Compliance focused
- Started Contribution & SW company acquisitions
- Research, Consumer, DC – OSS use
- FOSS Board
- Legal Chair

**SanDisk**
- Compliance and Community focused
  - but protective of strong patent licensing program
- OSSC
- Legal Chair
- Open Source Strategy Office
Combined Best From Three companies

- Compliance, Protection for IP Licensing, Community & Brand
- OSC for Strategy and Approvals
- Contribute to projects pre-approved by OSC & strategy
- OSWG for day to day working
- OS Office for external visibility, engagement, education
- Establish common tool for scanning
- Single and easy to use portal and processes
The Open Source Governance Bodies

- Company Strategy
- Open Source Council
- Standards
  - Communication
  - Projects
  - Standards Activities
Balancing IP Portfolio & Open Source Contributions

Monetization Of IP Portfolio

Contribution to Open Source

• Certain FOSS contributions/consumption do not require an IP review
• Helpful to have someone with strong legal and technical understanding
• Review depends on the size of your patent portfolio
• Need checks and balances
Western Digital
Open Source Office
Key Takeaways
Or what we’ve figured out from building out OSS programs multiple times

• Company Culture and Strategy Drives Practices and Differences
• Find the OSS Drivers in the Company and Make Them Your Friends
• Be Patient...Integration takes time
• Be Inclusive...legal, engineering, IP, IT
• Scaling is Important...need to evolve
• Make Compliance Developer Friendly
• Make OS Legal Team Visible and Engaged in Community
• Establish an Open Source Office
• Use OpenChain Checklist To Review Completeness
Thank You To Western Digital Legal Team

- Open Source
  - Alan Tse

- IP & Patent
  - David McKenzie
Questions