Chapter 1
Politics Hinders Open Standards in the Public Sector: The Massachusetts Open Document Format Decision

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EXECUTIVE SUMMARY

In 2003, Eric Kriss, of the Executive Office of the Governor of Massachusetts, advised all employees that the Executive Branch would begin a transition of its information technology resources into open standards. The intent of the plan was the standardization of the IT infrastructure and the improvement of interoperability across agencies. The Executive Office later extended the open standards policy to electronic documents. In the quest to make documents accessible across agencies, Open Document Format (ODF) was declared to be the preferred format for storing data. This decision provoked a serious conflict between Microsoft and the Executive Branch after it became clear that proprietary open document formats, such as the one that was being offered by Microsoft, were declared to be unacceptable. This case explores the decisions that the champions made, the role that politics played in the process and the impact of these decisions on the ODF implementation.
ORGANIZATIONAL BACKGROUND

Government and IT Organization Structure

The Massachusetts State Government consisted of three branches, the Legislature, the Judicial and the Executive Branches. The Executive Branch consisted of the Office of the Governor and fifteen executive departments. The Executive Office for Administration and Finance (EOAF) had fifteen divisions and Bureaus, one of which was the Information Technology Division (Exhibit 1). The Information Technology Division (ITD), which is the primary focus of this article, was a unit that reported to the head of the Executive Office for Administration and Finance.

The ITD was charged with the responsibility of providing information technology (IT) services for the 170 plus agencies in the Executive Department. These services included Internet access, enterprise applications, wide area networks, Web portal services, a central e-mail system, and Web and application hosting services. The ITD also set the IT standards for all other Executive Department agencies. By an action of the Legislature, the Office of the Chief Information Officer (CIO) was created to head the ITD in 1996 (ITD, 2006a). The CIO reported to the Secretary of the EOAF. The ITD had ten operational groups.

In the fiscal year 2005, the ITD employed over 250 technologists and IT financial, legal and policy experts. All the executive’s offices reporting to the Office of the Governor had about 1700 technologists. Some 95 percent of IT employees were union employees. Microsoft supplied over 80 percent of the installed desktop software within the Executive Branch. Most of the agencies reporting to the Office of the Governor had their own Chief Information Officers and Chief Security Officers. The agency Chief Information Officer (CIO) was the expert in the agency, department or other branch of government who had the delegated authority for all information technology resources in use within the entity. The responsibilities included, in some cases, the day-to-day planning, budgeting, deploying, maintaining and controlling of the information technology resources of the entity. The agency Chief Security Officer (CSO) was the individual, within an agency, department or bureau, who had the delegated authority for ensuring that the information and the IT systems of an entity had adequate security controls in place. The CIO and the CSO may or may not be the same person. The agency CIOs and CSOs were independent in the sense that they did not report directly to the Office of the CIO within the EOAF. The agency CIOs that reported to the Office of the Governor were required to submit their projects for review and the approval of the Office of the CIO only if a planned information technology development project or purchase by the agency had a total projected cost, including the cost of any related hardware, software and
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