OSS Watch

Institutional
engagement
with open
source

Randy
Metcalfe

Institutional engagement with open source

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- open source is more than just a copyright licensing paradigm
- universities across the UK use open source software regularly
- institutional engagement with open source means more than just using it
- Oxford is an exemplar of good practice (in some areas)

OSS Watch: the UK open source software advisory service

- unbiased advice and guidance on free and open source software for UK higher and further education
- funded by the Joint Information Systems Committee (JISC) and based within the Research Technologies Service at the University of Oxford
- promotes awareness and understanding of the legal, social, technical and economic issues that arise when educational institutions engage with free and open source software

http://www.oss-watch.ac.uk/

Institutional engagement with open source

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- a copyright licensing paradigm
- a marketing term for *free software*
- a software development methodology
- all about community
- a business model

Open source is also...a warm puppy

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Do universities in the UK use open source software?

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YES

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- Apache web server
- OpenOffice
- Exim
- Firefox
- Moodle
- Plone/Zope
- Eclipse
- Linux: RedHat, SuSE, Debian, etc.
- MySQL
- Python
- and much more

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- part of the IT strategy of the institution
- a cost-cutting measure for cash strapped departments
- individual preference

Policy versus Practice

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mentioned in IT strategy

41%

considered in practice

76%

2006 - OSS Watch survey of IT Directors

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- institutional requirements
- user requirements
- evidence based decision-making
  Business Readiness Rating http://www.openbrr.org/
  Open Source Maturity model
                    http://www.navicasoft.com/pages/osmm.htm

And the result?

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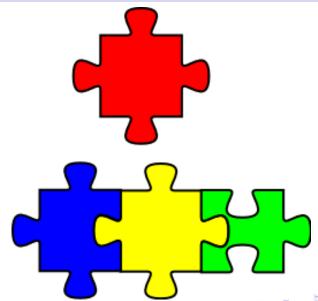October 2003 no significant evidence of use in UK FE
colleges

March 2006 56% of further education colleges report they
are using Moodle

OSS Watch surveys of IT Directors 2003 and 2006

Institutional engagement: what does it mean?

Open source is not free beer

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Engagement entails commitment

- The Open University has commited to a GBP 4 million project of direct development of core Moodle components.
- This is in addition to the money earmarked for internal development (e.g. OU styling), training, support, and roll-out to all staff.

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- support for institutional deployments
- staff development and retention
- international profile
- research and development
- *profit?*

Open source exploitation: LAMS at MacQuarie University, Australia

Learning Activity Management System

- began as proprietary software
- full code acquired by MacQuarie University
- re-released as open source software under GPL
- Dual licence and support/consultation exploitation route

  - LAMS Foundation http://www.lamsfoundation.org/
  - LAMS International http://www.lamsinternational.com/

Does the University of Oxford use open source software?

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YES

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- Apache web server
- OpenOffice
- Exim, BIND
- Firefox, Thunderbird
- Moodle
- Plone/Zope
- Eclipse
- Linux: RedHat, SuSE, Debian, etc.
- MySQL
- Python, Perl, PHP
- and much more

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- part of the IT strategy of the institution - no
- cost-cutting measure for departments - yes
- individual preference - yes

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Open source software is not mentioned in the (3rd) draft ICT
Strategy for the University of Oxford.

- http://www.ict.ox.ac.uk/strategy/plan/

Perhaps an ICT Strategy should not mention software at all.

*How then does rational consideration of open source
alternatives become part of the ICT procurement process?*

Engagement challenge: contributing code

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- (for most of you) copyright on the code you write belongs to your employer
- procedures to gain institutional approval for contribution of code may be so difficult that in practice few bother engaging with them

Do you know the route to contribution?

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No change to University of Oxford policy.

Staff who wish to contribute to open source projects should seek the permission of the Director before doing so.[...] A register of open source projects will be maintained, which will list

- The name(s) of staff involved
- The details of the project (description, URL etc)
- The relevance to OUCS service
- The licence under which contributions will be issued
- A summary of the degree of involvement

Staff will be asked to update the register once a year and confirm their involvement. The Director will include a summary of the register in the OUCS annual report.

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Open Source Software: Use within UK Government

http://www.govtalk.gov.uk/policydocs/

JISC Policy on Open Source Software for JISC Projects and Services

http://www.jisc.ac.uk/index.cfm?name=about_policy

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Issued in October 2004:

- UK Government will consider OSS solutions alongside proprietary ones in IT procurements. Contracts will be awarded on a value for money basis.
- UK Government will only use products for interoperability that support open standards and specifications in all future IT developments.
- UK Government will seek to avoid lock-in to proprietary IT products and services.

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- UK Government will consider obtaining full rights to bespoke software code or customisations of COTS(Commercial Off The Shelf) software it procures wherever this achieves best value for money.
- Publicly funded Research and Development projects which aim to produce software outputs shall specify a proposed software exploitation route at the start of the project. At the completion of the project, the software shall be exploited either commercially or within an academic community or as OSS.

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Issued in September 2005 as an implemention of the UK
government policy.

- Advice and guidance must be neutral and unbiased.
- Project funding process must not discriminate between
  between open source and closed source software,
  unless the purpose of the projects or services
  specifically requires it.
- Value for money over the expected lifetime of the
  system must be compared.

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- Projects must maintain an IPR register.
- Ownership of code in joint projects must be established before work begins.
- Source code must be released under an OSI-approved open source licence, unless the bid explicitly argues why this should not be the case and proposes an alternative licence.

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- Projects must state in their bid ... whom they see participating in the project.
- Projects should engage with end users and other parties to encourage and build self-sustaining communities.
- Projects should accept bug reports, patches, translations and feedback from contributors outside the project.

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- Research Services
- Legal Services
- ISIS Innovation
- IT staff
- researchers
- students

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And don't forget the warm puppy

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Further Information

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For more information on open source software development
and deployment, visit http://www.oss-watch.ac.uk/ or write
to info@oss-watch.ac.uk

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warm puppy photo Steve Starer, `http://www.flickr.com/photos/21044097@N00/129340743/`, Creative Commons Attribution Licence