OSS Watch
Supporting open source in education and research

▶ http://www.oss-watch.ac.uk/newsletters/july2011.pdf

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Welcome to the July issue of our newsletter. This month's featured article, 'Planning for sustainability', comes from Gabriel Hanganu and Ross Gardler, who explain how to build a sustainability plan at the beginning of your project, and describe the most common sustainability issues confronting the projects that OSS Watch advises. They also list the resources you should consider including in your project budget.

Our first blog post concerns the second Open Source Junction event taking place at Wolfson College, Oxford, 5-6 July 2011. Are you coming along to this excellent event? The second blog post comes from Sander van der Waal who has exciting news about changes within OSS Watch. I won't spoil the surprise and will let Sander tell you himself.

Finally, it is with some regret that I tell you that this issue will be the last of our newsletters in this format. As OSS Watch moves into a new funding period from August we have decided to say goodbye to this format of newsletter, designed for hard copy printing, and say hello to a streamlined online newsletter. Keep an eye on our website, and our announce list, to make sure that you don't miss the launch of our new newsletter format.

Elena Blanco, Content Editor, OSS Watch ▶ info@oss-watch.ac.uk

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▶ OSS Watch news feed
▶ http://www.oss-watch.ac.uk/rss/osswatchnews.rss

News from OSS Watch

Ross Gardler steps down as OSS Watch manager, Sander van der Waal steps up

During June 2011 Ross Gardler stepped down as manager of OSS Watch in order to pursue an opportunity to provide services complementary to OSS Watch, but more geared towards the product development in the commercial sector. We are now pleased to announce that OSS Watch's very own Sander van der Waal has stepped up to the role of OSS Watch manager. Sander will be steering OSS Watch as we continue to provide an unbiased, non-advocacy advisory service for the HE and FE sector. As we have been doing since 2003, we are here to help institutions and projects who are using or developing free and open source software so if you need any advice or help please do get in touch at info@oss-watch.ac.uk.

▶ http://osswatch.jiscinvolve.org/wp/2011/06/28/exciting-times-for-oss-watch/

Planning for sustainability

Most academic funding bodies encourage the projects they fund to release their software under an open source licence, and to make provision for the sustainability of their software from the outset. Gabriel Hanganu and Ross Gardler explain how to build a sustainability plan at the beginning of your project, and describe the most common sustainability issues confronting the projects that OSS Watch advises. They also list the resources you should consider including in your project budget.

▶ http://www.oss-watch.ac.uk/resources/planningsustainability.xml

OpenOffice goes into The Apache Software Foundation's Incubator

Oracle has donated the open source OpenOffice office suite to The Apache Software Foundation (ASF). All code donations from external sources wishing to becoming part of the ASF's efforts enter through the Incubator and so OpenOffice will be known as an 'incubating project'. Once it has proved its viability and sustainability it will graduate to full project status.

▶ http://www.zdnet.com/blog/open-source/oracle-gives-openoffice-to-apache/9035

OpenOffice.org proposed to ASF incubator

Oracle has announced its proposal to contribute the OpenOffice.org code to The Apache Software Foundation's Incubator. 'We welcome highly focused, emerging projects from individual contributors, as well as those with robust developer communities, global user bases, and strong corporate backing,' said Jim Jagielski, president of The Apache Software Foundation. Mr Jagielski is also the proposed podling mentor for the OpenOffice.org community during the incubation process.

▶ http://www.marketwire.com/press-release/statements-on-openofficeorg-contribution-to-apache-nasdaq-orcl-1521400.htm

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Planning for sustainability

Full article can be found at http://www.oss-watch.ac.uk/resources/planningsustainability.xml

Most academic funding bodies encourage the projects they fund to release their software under an open source licence, and to make provision for the sustainability of their software from the outset. This does not mean simply releasing code under an open source licence. It also involves building a sustainability plan at the beginning of the project and maintaining it during the project's lifetime.

In the first part of this document we describe the most common sustainability issues confronting the projects that we advise. In the second part we list the resources you should consider including in your project budget. This will help you to avoid common pitfalls and increase the project's chances of becoming sustainable.

1. Main sustainability issues

OSS Watch is frequently approached by academic projects who have failed to address the sustainability of their software appropriately or in a timely manner. Some of the common issues include: failure to attract third party interest, poor managament of community infrastructure, lack of project memory and inefficient release management.

1.1. Failure to attract third-party interest

Academic projects are typically good at making the community aware of their work, but they are less good at engaging the community in the project itself. This is crucial to the long-term sustainability of the project. Two key questions to ask when starting to build a project community are: Who is the project community? Do I need to build a new community, or is there an existing one my project should be part of? This means that before doing any other community-related work, you need to explore existing projects to see if you can either leverage their work or contribute to it. By doing so, you will avoid duplication of effort, and by embedding your project in a larger community, you will improve its potential sustainability. OSS Watch may be aware of similar projects to yours, with which you could collaborate.

Planning for continued funding of the core team is rarely sufficient to ensure sustainability. Open source software often becomes sustainable through third-party contribution in various forms. In many cases, third-party developers are funded to work on complimentary problems, and the fastest way for them to solve the problem is to work on already existing code. In order to facilitate third-party contributions, you need to ensure that the source code is available from the outset and to provide clear guidance and structures within which people can contribute.

Many projects think that it is not worth the effort involved in building community infrastructure at an early stage, since their project is small, incomplete or covers a niche market. However, experience shows that it is easier and cheaper to do this before the community starts to take an interest. A key activity in this respect is to adopt a governance model. This is a document that clearly describes how third parties are to engage with the project and provides the rules and boundaries that ensure that the project remains manageable within the resources available. OSS Watch provides a number of template governance documents and can work with projects to help them customise these as appropriate.

People are often concerned that adopting a governance model involves too much red tape for a small project team. Again, the issue is not whether the existing team needs it, but whether a new member with independent funding is likely to participate in the project. If red tape is of concern to you, we recommend starting with a really lightweight model, such as the principal investigator has veto and delegation powers, while decisions are made through a process of lazy consensus (these terms are also discussed in our governance models document).

Forking, or taking the source code and setting up a competing project, is another issue open source projects must be prepared to deal with. Forking may seem to be the most efficient solution in the early stages of a project. However, this may prevent third parties from easily adopting your code, and will, over time, create significant maintenance problems for your team. Indeed, you should not choose this path without fully understanding its consequences.

1.2. Poor management of community infrastructure

In addition to indicating the type of licence that will govern your software outputs, as mandated by JISC and other funders, you should clarify how IPR will be managed within the project. It is also vital that you maintain a clear and unambiguous record of all project contributions, both code and non-code. This process will be greatly simplified if you use a version control system, as part of a key set of open development tools and supporting processes.

People often think that an open source project involves spending a huge amount of time informing everyone about ongoing developments. But this need not be the case. If you select the right tools and processes, the external communication will simply be a by-product of the development activities.

Many open source projects that make their software available for download and reuse fail on the documentation front. A true open source project ensures that all the solutions adopted, including the decision-making process used in reaching them, are openly shared and appropriately recorded for later reference. This is because the reasons behind a particular decision are often more important, with respect to project sustainability, than the software itself. Such documentation reduces the chances of repeating past mistakes, and ensures that old ground does not need to be covered repeatedly.

Projects should therefore conduct all development using tools that are capable of preserving project memory. This approach will enable them to focus on development, while ensuring that all decisions are open for comment within the community, having been recorded in such a way that everyone who wishes to understand the project context and the motivations behind each decision can do so.

1.3. Lack of project memory

At OSS Watch we encourage projects to create a community environment because this is the way to ensure sustainability for open source software. That is, the software is developed collaboratively by disparate groups funded for overlapping but potentially unrelated projects.

> **Planning for continued funding of the core team is rarely sufficient to ensure sustainability.**

For us, the key to sustainability is to ensure that the project attracts interest from the widest possible community. This means that a project memory needs to be created for those who come after the initial funded effort. Without community infrastructure there is no project memory; without memory the only way to keep the project alive is to get more funding for the originating team. Failing to set up project memory during funded development will affect the creation of new projects based on the old.

Maintaining project memory involves things like documenting discussions and decisions taken by posting them to the mailing list, recording and prioritising issues in the issue tracker, talking to users to understand their needs, etc. All these are activities

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that should be undertaken by any project. The only difference here is that this is done in the open, not behind closed doors. The pay-off is that you will be creating a project memory for potential future community members, which saves time if the project becomes successful.

1.4. Inefficient release management

In open source projects it is extremely important that software is released early and often. Releasing early and often enables people to try out the software more easily and increases the chances of getting new contributors. A well-defined release management process is crucial for helping developers coordinate their activity towards producing new versions of the software, while addressing the IPR and licensing issues associated with their multiple contributions. A separate document on the technical details of the release process provides some best practice guidelines, along with a checklist.

2. Sustainability resources

Ideally, a first version of the sustainability plan should appear as early as the project bid stage. OSS Watch can help you to prepare this, as described in Advice for project bids. Thereafter, the sustainability plan should be periodically updated to reflect the expanding opportunities for collaboration and third-party contributions as the project community grows.

Most projects are unable to estimate the amount of time necessary to build a sustainable community. If they do think about it, they tend to over-estimate the amount of time required, or decide that the pay-off will not be worthwhile, and thus drop it from the plan.
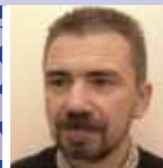
However, it is important to acknowledge that most community development work contributes to a well-managed project in many ways. In the short term, it ensures that there is a defined structure for managing the software aspects of the project. In the medium term, it guarantees that time is not wasted on repetitive tasks, such as producing and testing releases. In the long term, it ensures that the project is fully open and contributors are able to engage with the project with maximum efficiency.

To help you plan, the table below lists some of the activities you should schedule into your bid, the benefits they bring to the project and the estimated time required to accomplish them.

▸ Article continues at http://www.oss-watch.ac.uk/resources/planningsustainability.xml

Gabriel Hanganu

Open Source Junction 2, 5-6 July 2011

Published by Gabriel Hanganu on June 15, 2011.

OSS Watch, in collaboration with 100% Open, has created Open Source Junction, a series of exciting events connecting industry and academic innovation. These events bring together the best business and academic minds to explore how the two sectors can jointly innovate and exploit open source mobile technologies.

Following the successful Open Source Junction 1 back in March, Open Source Junction 2 will focus on context-aware mobile technologies. In computer science, context-awareness refers to the idea that computers can both sense and react based on their environment. Context includes location (the users' absolute or relative position, surrounding resources, physical conditions, such as noise or light levels), but is also understood as a broader process involving users themselves (their habits or emotional states, patterns of social interaction, types of activity, etc.).

This two-day workshop, to be held on 5-6 July at Wolfson College in Oxford, will showcase a selection of context-aware mobile projects and provide delegates with key knowledge of open innovation and open development. Participants from both industry and academia will also have a unique opportunity to explore potential partnerships in the field of context-aware mobile technologies.

I hope to see some of you at the event.

▸ http://osswatch.jiscinvolve.org/wp/2011/06/15/open-source-junction-2-5-6-july-2011/

Sander van der Waal

Exciting times for OSS Watch

Published by Sander van der Waal on June 28, 2011

A page has been turned in the history of OSS Watch. After four years of strong guidance and excellent leadership, Ross Gardler has left OSS Watch to create a spin-out named OpenDirective with another great OSS Watch alumnus, Steve Lee. Ross has handed an OSS Watch over to me that is in very good health. With clear vision Ross has transformed OSS Watch into a service that is well-equipped to serve the current UK academic sector. I look forward to working with our excellent team to continue our services following on from the successful direction Ross has taken us. In October 2009 I joined OSS Watch as a Development Officer. My background consisted mainly of an MSc in Computer Science and 5+ years of experience as a software developer in the commercial sector in the Netherlands. That turned out to be quite different from working in the academic sector in the UK, but the Oxford University Computing Services proved to be a valuable employer and provided a stimulating work environment. The OSS Watch team was very welcoming and I learned very much from working with them. Looking back at what we have been able to achieve makes me positive about OSS Watch's future and enables me to take on the role of manager with confidence. I would like to thank Ross for his hard work and vision, for all the effort he has put into OSS Watch and the leadership he has shown.

> **These are exciting times for OSS Watch.**

OSS Watch has provided advisory services to the UK Higher and Further Education Sector for 8 years now and we will continue to do so. Our services will remain free at the point of use for the sector and we will remain unbiased and non-advocacy. In the coming year, we will continue the project support work that we have been doing increasingly over the last few years. We will be there for projects that need advice on open source software development and work more actively with projects that strive to achieve sustainability through open development. We will continue to work on our content to help provide guidance that is suited to the sector's needs. Furthermore, we will continue with assisting institutions and knowledge transfer offices to help them leverage open source as a tool for exploiting IPR. And last but not least, we will help institutions with policy and guidance on using, procuring and engaging with open source software.

These are exciting times for OSS Watch. While continuing our services to the sector, working together with OpenDirective provides new opportunities for the projects we work with and for the sector at large. I look forward to working with you all!

▸ http://osswatch.jiscinvolve.org/wp/2011/06/28/exciting-times-for-oss-watch/

Events

July 5-6
Open Source Junction 2: context-aware mobile technologies, Oxford, 5-6 July 2011
OSS Watch invites you to take part in its second Open Source Junction event taking place at Wolfson College, Oxford, OX2 6UD, on Tuesday 5 July and Wednesday 6 July 2011. The Open Source Junction series brings together the best business and academic minds to explore how the two sectors can jointly innovate and exploit open source mobile technologies. This event will focus on context-aware mobile technologies and follows on from the first Open Source Junction workshop on cross-platform mobile apps.

▸ http://www.oss-watch.ac.uk/events/2011-07-05_Open_Source_Junction_2/programme.xml

Jul 25-29
OSCON 2011, Portland, Oregon, 25-29 July 2011
Join today's open source innovators, builders and pioneers as they gather at the Oregon Convention Center in Portland, Oregon, to share their expertise and experience, explore new ideas and inspire each other. Learn first-hand how new developments in open source are shaping the future and have some serious fun with 2000+ people like you. Registration now open.

▸ http://events.linuxfoundation.org/events/linuxcon-europe

Sept 26-28
Hackfest at PKP Scholarly Publishing Conference, Berlin, Germany, 26-28 September 2011
The Public Knowledge Project has announced that a Hackfest will be part of the 2011 PKP Scholarly Publishing Conference taking place 26-28 September, 2011 in Berlin, Germany. The Hackfest is an opportunity for developers to gather and work with other community members and the PKP team to rapidly develop an interesting project based on PKP software.

▸ http://pkp.sfu.ca/ocs/pkp/index.php/pkp2011/index/pages/view/hackfest

Oct 26-28
LinuxCon Europe 2011, Prague, 26-28 October 2011
The Linux Foundation is pleased to announce the launch of LinuxCon Europe in 2011. LinuxCon Europe will bring together the best and brightest that the Linux community has to offer, including community developers, system administrators, business executives and operations experts. It will feature speakers from across Europe and around the globe, innovative and abundant programme content, and opportunities for attendees to connect with peers. For this year only, attendees will be offered the opportunity to also attend the Embedded Linux Conference Europe (ELCE) at no additional cost.

▸ http://events.linuxfoundation.org/events/linuxcon-europe

Nov 7-11
The Apache Software Foundation's official conference, trainings and expo, Vancouver, 7-11 November 2011
With a theme this year of 'Open Source Enterprise Solutions, Cloud Computing and Community Leadership', the conference features dozens of highly relevant technical, business and community-focused sessions aimed at beginner, intermediate and expert audiences. Registration and Call for participation are now open.

▸ http://na11.apachecon.com/

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Frequently Asked Questions

Q How can I be sure that OSS Watch's documents are up to date?

A All of the documents published on the OSS Watch website are subject to a rigorous review process conducted by members of the OSS Watch team. This begins six months after the document is first published, when it is reviewed for integrity. After 12 months, and thereafter on a six-monthly basis, it will be reviewed for integrity and relevance, and edited or rewritten to bring it up to date, or archived. In spite of our thoroughness, we are not infallible and always welcome feedback that will help us keep up to date.

Our document inception and review processes are described in greater detail in The life of an OSS Watch document.

Find answers to your questions at: http://www.oss-watch.ac.uk/about/faq.xml