


I T H A K A



“OOSS” Project

OSS-Watch

April 10-12

Oxford, UK

Agenda

- Overview of Ithaka and the OOSS project
- How open source software (OSS) can benefit higher education
- Risks to the production and adoption of OSS in higher ed
- Conclusions



Ithaka Background

- Ithaka was established with a mission to accelerate the productive uses of information technologies for the benefit of higher education around the world.
- We do this by “incubating” new initiatives in this space and providing services to projects that can benefit from the resources and experience Ithaka offers.
- Our main area of activities are:
 - Administrative services
 - Research
 - Strategic Services
- Affiliated with JSTOR
- Ithaka and the entities we serve are 501(c)(3) charitable organizations.



Project Overview

- Study is on the need for a coordinating body to support the creation and adoption of OSS in higher ed (with focus on the U.S.)
- Led by Paul Courant, economist and former provost of the University of Michigan, in collaboration with Ithaka.
- Funded by Mellon, Hewlett and seven colleges and universities.*

*Carnegie Mellon, Indiana, Stanford, Marist College, Foot Hills De Anza Community College, UNC, Michigan



Study Design

- Consulted extensively with key constituents:
 - Senior administrators
 - Principals and developers of OSS projects
 - Commercial firms
 - Related projects
- Identified valuable sources of quantitative data



Definitions

- We separate openness of source code (adjective) from method through which it is developed (verb).
- When we refer to “open source” we mean that the software’s source code is:
 - 1) made available for others to use, view, and modify
 - 2) may be redistributed by anyone for free, without royalties or licensing fees to the software owner.
- “Community development” refers to distributed development used by projects like Linux and Apache.



Problem Space

- Higher ed spends a lot on IT and many institutions are not happy with the results. Three primary issues:
 - Flexibility
 - Control
 - Cost
- Want to understand whether OSS can be a solution to this problem, and if so, whether it needs coordinated support



OSS has great promise

- OSS making significant inroads in higher ed, starting with OSS that's not specific to higher ed.
- Higher ed can produce great software
- Need to think through what we can learn / imitate from open source success stories
 - Apache, Linux, Moodle



Risks to open source in higher education and possible mitigation strategies

Risks:

- #1: important applications do not get launched

Potential mitigation strategies:

- Take systematic approach to seeding key applications



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- #1: important applications do not get launched
- #2: OSS projects don't reach sustainability

Potential mitigation strategies:

- Take systematic approach to seeding collaborations
- Provide support services and best practices to projects



Risks to open source in higher education and possible mitigation strategies

Risks:

- #1: important applications do not get launched
- #2: OSS projects don't reach sustainability
- #3: legal tangles and liability concerns

Potential mitigation strategies:

- Take systematic approach to seeding collaborations
- Provide support services and best practices to projects
- Pursue creation of standard license and secure legal services for projects



Summary

- OSS brings a great opportunity for higher ed to produce software that meets its needs better (and potentially more economically) than current options
- There are a number of risks to fulfilling this promise in areas of high priority, such as administrative applications
- We can identify a number of ways to mitigate these risks, some of which might usefully be provided by a new organization. Many are already addressed by existing efforts.

See <http://www.ithaka.org/strategic/ooss.htm> for background papers and notes.

