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Online newsletter available at:

<http://www.oss-watch.ac.uk/newsletters/may2011.pdf>

Welcome to the May issue of our newsletter. First off, we invite you to read the executive summary of our fourth National Software Survey, conducted in late 2010. It's the fourth time that we've run this survey and once again we examine how HE and FE institutions use and engage with open source software. Next up, our first blog post is a guest post by Michelle Pauli who was at our most recent event, Open Source Junction, which took place in Oxford, 28–29 March 2011. We promised you a report from this well-received event in last month's newsletter so we are delighted to be able to bring Michelle's report to you.

Finally, Steve Lee follows up an earlier guest blog post by Mark Webb from the Met Office with a post of his own giving an update on what has happened to Mark's cloud model project now that they have adopted a meritocratic governance model. It certainly sounds as if the adoption of a governance model has galvanised the project more than we could have expected.

As always, do let us have any comments at [info@oss-watch.ac.uk](mailto:info@oss-watch.ac.uk).

Elena Blanco, Content Editor, OSS Watch ▶ [info@oss-watch.ac.uk](mailto:info@oss-watch.ac.uk)

## News from OSS Watch



### Open Source Junction mobile apps event - report published

Michelle Pauli's blog report captures all the action at Open Source Junction, our recent event which brought together commercial and academic developers working on mobile apps to discuss innovation and collaboration and build partnerships.

▶ <http://osswatch.jiscinvolve.org/wp/2011/04/12/oss-watch-open-source-junction-oxford-28-29-march-2011/>

### OSI board elections

In a special board meeting convened for board elections on March 16 2011, the OSI board elected three new illustrious members of the open source community - Jim Jagielski, Karl Fogel and Mike Godwin. The board voted to expand the board from 10 to 11 members to enable all three members to join. Two board members were re-elected to serve a second term - Mr Harshad Gune and Dr Martin Michlmayr.

▶ <http://www.opensource.org/osi-board-members-officers-committee-chairs-2011-2012.html>

### White House releases IT Dashboard as open source code

The White House has released the software code for its IT Dashboard and TechStat toolkit. The initiative was coordinated through Civic Commons, a code-sharing project incubated within Code for America that helps governments share technology for the public good, with support from OpenPlans. A live demonstration of the open-sourced code for IT Dashboard is now online. The code is available at SourceForge.net and is released under a GNU Public License (GPL). A bug tracker and other resources are also online.

▶ <http://radar.oreilly.com/2011/03/white-house-it-dashboard-open-source.html>

### Red Hat is on its way to \$1 billion in sales

The US-based Linux distributor Red Hat seems set to become the first open source software company to break through the \$1bn mark. In the last quarter of its fiscal year, which ended in February, the company increased its sales by a quarter. Year on year, quarterly sales rose from \$196 million to \$245 million, while net income increased from \$23 million to \$33.5 million.

▶ <http://www.h-online.com/open/news/item/Red-Hat-is-on-its-way-to-1-billion-in-sales-1214338.html>

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# JISC

# OSS Watch Survey 2010: Executive Summary

Full article can be found at <http://www.oss-watch.ac.uk/studies/survey2010/execsummary.xml>

In late 2010 OSS Watch conducted their fourth bi-annual survey of Higher and Further Education IT directors' attitudes towards, and adoption of, open source software.

## 1. Open source in procurement policies

In terms of procurement policy we see an ever-increasing awareness of the possibility of using open source software. There has been another big increase in the number of institutions that include the consideration of open source in their procurement policies, both in Higher Education (HE) and Further Education (FE). This will help creating a more level playing field for suppliers of open source software.

On the other hand, there is still a relatively large number of institutions that indicate they prefer closed source over open source (35% of FE and 15% of HE respondents). We suspect this is based on a continued lack of understanding about open source that needs to be addressed.

The essential differences between open and closed source are its development and licensing model. There is no reason why an open source solution could not have a very strong backing of a commercial entity and open source suppliers are capable of providing their software with terms very similar

to those of suppliers of closed source software. Suppliers such as Red Hat have demonstrated this over many years. It may be true that some suppliers of open source do not match up to the requirements of a procurement exercise in a major institution, but this holds just as true for closed source software suppliers. The suitability of open source solutions and suppliers needs to be evaluated on a case by case basis. Having a policy that prefers one model over another, by default, is not helpful in this respect.

## 2. Usage of open source software

With respect to the use of open source software in institutions, there is another reported increase, both on servers and on desktops. This was predicted by responses in the 2008 survey. For FE, the increase is a little less than predicted, whereas for HE, the increase is a little more than predicted.

For the first time we conducted a separate background survey. We asked a broader spectrum of staff at HE and FE institutions about open source software. Respondents were given the option of answering the questions for the whole institution or for their department only.

There were a few differences in the responses between the regular survey and the background survey. For example, when asked about policy relating to open and closed source software, there was a less pronounced preference for closed source software and a more pronounced preference for open source software. This was especially true at the departmental level.

## 3. Engagement with open source projects

One of the most striking results of the background survey was the responses to the question of whether they contributed to open source software.

A much higher proportion of the respondents indicated that they contribute to open source software compared to the main survey. This is also especially true on the departmental level. When IT directors are unaware of their staff's contributions, they have no knowledge of or control over these IP assets generated in their institution. This disconnect needs to be addressed in order to ensure copyright is being correctly managed in these contributions.

While there are more contributions than directors know about, there are fewer policies that encourage and manage these contributions. The survey respondents indicate that engagement with open source is now mentioned in fewer job descriptions of IT staff than was the

**All in all, this survey supports the idea that open source software is still on the rise in the UK higher and Further education sector.**

case in the previous survey in 2008. Most report that this should be done in the employee's own time, which means it will not be done in most cases; there will just be local modifications.

This indicates a lack of policy towards managing open source engagement. How do we know the staff member is allowed to contribute to an open source project? Who owns the copyright in these cases? Is the staff member liable when there is a dispute? Lack of a managed contribution policy can expose institutions to legal risk.

On the other hand, respondents are expecting more deployments of open source software on their IT infrastructure. This makes it even more urgent that engagement with open source projects is addressed by the IT management. This needs to be done both in the job description of the IT staff as well as in the day-to-day management of their work.

For efficient and effective management of open source IT systems it is important that the staff involved with the running and maintenance of the software can engage with and contribute to the software project easily and that this is in fact encouraged to gain the most benefit out of the project.

Full article can be found at <http://www.oss-watch.ac.uk/studies/survey2010/execsummary.xml>

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## 4. Total Cost of Ownership calculations

Respondents indicate that several IT systems are due for replacement in close to 50% of institutions. Given the ongoing increase in institutional interest in and use of open source software alongside the significant open source emphasis of government policy on software procurement in the public sector it is crucial that the question of how to assess open source software in a procurement process is addressed.

The survey examined the criteria that respondents find most important when procuring software. The number one issue is the Total Cost of Ownership (TCO) of solutions.

However, when asked for the common reasons for rejecting open source software in procurement, most of the top criteria are not related to TCO. Issues that heavily influence TCO, such as migration costs, do not appear in the top 5.

One of the top five reasons provided was 'interoperability and migration problems'. However, the effort of migration to open source is comparable to, if not less than the effort of migrating to another closed source solution. We therefore suggest that these respondents were likely to reject migrating to a new closed source solution for the same reason. Other reasons given are largely issues of education and supplier availability.

## 5. Conclusions

All in all, this survey supports the idea that open source software is still on the rise in the UK higher and Further education sector. A number of issues need to be addressed, such as providing a means to perform an accurate and consistent Total Cost of Ownership calculation for software, both open and closed source. The survey shows that there is now a real opportunity for open source suppliers to build offerings suitable for the sector. However, it also shows that institutions need to gain an understanding of how to evaluate open source products and suppliers and how to manage their engagement with those suppliers or with the projects themselves.

OSS Watch is continuing its work in these areas. We are developing a [Software Sustainability Maturity Model](#) and a process for evaluating the Total Cost of Ownership of procurement solutions. Developments like these will continue to help institutions assessing open source software and create a more level playing field.

The [full survey report](#) is available to download in PDF format.



# OSS Watch Open Source Junction, Oxford, 28–29 March 2011

Published on April 12, 2011



This guest post was written by Michelle Pauli, who also wrote the live blog at Open Source Junction.

*'More people pooling more resources in new ways is the history of civilisation'*

(Howard Rheingold)

Open source software features, in some form, in just about every mobile device. This has created huge opportunities for innovation, communication and collaboration, and there is wide interest in mobile apps in the developer, consumer and business world. Yet, so far, there have been few attempts to bring together commercial and academic developers working on mobile apps in order to build partnerships based on lessons learned from open source development.

[Open Source Junction](#), with its goal of building a sustainable community of stakeholders interested in mobile technologies, did just that. The first in a series of planned events, this two-day meeting focusing on cross-platform mobile apps gathered participants from all sectors to not only discuss innovation and collaboration but also take the first steps towards making it happen.

### Open innovation

The 21st-century model of an organisation is 'default to open', declared Roland Harwood of 100% Open, citing Wikileaks as a topical example. Setting the scene for the networking elements of the event, he explained that open innovation is less about the 'what' than the 'who'. It recognises that not all the smartest people work for us, so we need to move from the conceptual position that value lies in what we hold in our heads to the understanding that value lies in who we have around us. Or, as 100% Open put it, *'innovating with partners by sharing the risks and rewards'*.

Quoting the writer JG Ballard, Roland suggested that 'the future reveals itself through the peripheral' and said that we

all need to be better at spotting what's coming from outside our own sector. 'Talk to lots of people and don't stay in your own bubbles,' he urged.

He had some powerful examples of companies that had opened up and reaped the rewards. These ranged from Lego's inspired tolerance of copyright infringement that has made its Mindstorms range such a success, to Local Motors, a car sales company where customers have a hand in building the cars (think 'beer and welding evenings'). He also namechecked Mozilla and Android to demonstrate that open source is mainstream business now.

A slight note of cynicism entered the discussion when Roland was asked if, with some of the 'customer-led innovation projects' he described, there was an element of companies trying to get customers to do their marketing work for them. 'It's a fine line,' he admitted. 'But it is also possible to have a more two-way relationship with customers so that it is not just a one-way street based on selling.'

In any case, with open innovation, coming up with ideas is rarely the problem. The hard work lies in making them happen and the challenge is to not only recognise a good idea (which is crucial at the start of the process) but also to recognise the effort involved in taking it forward.

### Culture clash?

One of the reasons why implementing a good idea can be hard work comes down to clashes of cultures. There can be inertia and distrust between innovators and corporate bodies and collaboration can be perceived as risky. Roland described the 'airlock solution' that his organisation has pioneered to reassure both parties that ideas can be discussed in a confidential and 'safe' space.

...the challenge is to not only recognise a good idea [...] but also to recognise the effort involved in taking it forward."

▶ Blog post continues at <http://osswatch.jiscinvolve.org/wp/2011/04/12/osswatch-open-source-junction-oxford-28-29-march-2011/>

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Steve Lee

## Freedom through a clear governance model

Published by Steve Lee on April 4, 2011

While back, Mark Webb of the [Met Office Hadley Centre](#) for climate change described in a [quest post](#), how his Cloud model project [COSP](#) introduced a [governance model](#), based on one

of our templates. This was a result of a few informal chats over beers and his exploration of [OSS Watch public resources](#). Mark also described some of the immediate benefits they experienced.

Well recently I met up with Mark over skittles and beers (this time some excellent Otter Ale on stillage), and he described how the project has become more animated as a result of introducing a [meritocratic governance model](#). Mark explained that having a clear decision-making process is allowing them to move forward as a project. For example they are starting to explore release processes in more detail. So the COSP is clearly maturing through having the governance model in place.

But the observation that I found most telling was that the governance model has actually freed up blockages in the decision-making processes. This is despite initial concerns expressed by some project members that a governance model could be unnecessary bureaucracy. For example the project lead has been able to point to the model document to clearly state policy when

there has been debate or a decision needs to be made.

In particular it appears that lazy consensus has already sped up progress by allowing action to occur when it could previously get bogged down in fruitless discussion. For example one team member has set up a [Google code project](#). While this is excellent, I would add a cautionary comment that clear discussion about such decisions need to occur on the [public mailing list](#) or there is a risk of introducing decision by fait accompli, rather than lazy consensus.

This 'unblocking' reminds me of an analogy I once heard for the benefits of moral/spiritual frameworks that seems to apply well here. If you watch kids playing a game like football, they enjoy it more if there are rules in place and an authority to reference (the ref). Having no 'governance model' to define the roles and rules in place can result in frustration and long discussions, rather than getting on with the game. Many kids will quickly self-organise some basic rules and process so they can enjoy the game while quickly resolving debates.

So the take-home here is that if you don't yet have a governance model in place, it's time you did. Otherwise you could be holding your project back unnecessarily. You can even use one of our [templates](#) to speed up your adoption.

► <http://osswatch.jiscinvolve.org/wp/2011/04/04/freedom-through-a-clear-governance-model/>



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► <http://www.oss-watch.ac.uk/rss/events.rss>

## Events

Jun

14-15

### OSC presenting at SmartGov Live, London, 14-15 June 2011

The Open Source Consortium (OSC) will be presenting at SmartGov Live at ExCel London in June. Over two days, this free event will provide speakers, content and networking opportunities.

► <http://www.opensourceconsortium.org/content/view/143/1/>

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

To what extent is open source software used in the HE and FE sector?

A

OSS Watch have been researching the use of and policy around open source software in the HE/FE sector every two years since its inception in 2003. Over the years we have seen an ever-increasing use of open source software. The latest [survey](#) was held in 2010 and shows that more advice is needed to help the sector evaluate open source projects. OSS Watch's [Software Sustainability Maturity Model](#) can help achieving this.

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

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