OSS Watch Scoping Study

Introduction

OSS Watch is a new pilot advisory service on free and open source software. It is a national service for UK higher and further education based within the Research Technologies Service at the University of Oxford. OSS Watch aims to inform and advise about open source software and open standards through the development of best-practice guidelines, and out-reach activities aimed at OSS strategic planners, developers and users.

In an effort to determine how best to develop this service OSS Watch is conducting a scoping study of UK HE and FE institutions. Our goal is to investigate the current state of participation in free and open source software both in terms of projects developing such software and of institutional deployment of such software.

We have sent this survey to IT Directors/Managers at each further and higher education institute in the UK. The value of the study depends upon each respondent completing the full set of questions. Please be sure to select an answer for each question or sub-question.

The survey should not take longer than 20 minutes to complete.

This survey asks for factual information about IT use at your institution, and should ideally be filled out by someone who is familiar with IT across the institution. If you are only familiar with a particular department or school, please indicate that in the appropriate space below. Data from the survey will be anonymized in the report, and the report will be made public.

OSS Watch is funded by the Joint Information Systems Committee (JISC) and is managed by Sebastian Rahtz. For further information about OSS Watch please visit http://www.oss-watch.ac.uk/ or contact OSS Watch at info@oss-watch.ac.uk

Thank you for helping OSS Watch to develop into a useful service for UK HE and FE.

☐ If you would like to receive an electronic copy of the survey results and accompanying analysis, please tick this box.

I. Information on the individual filling out the survey (1 of 12)

Q1 Name

Q2 Email* (this field is mandatory)

Q3 Phone

Q4 Work Address

Q5 Please select the option that best describes your answers on this survey

☐ Speaking for the whole institution

☐ Speaking for a section of the institution

Q6 If you are responding for a section of your institution, please identify which department.

Q7 Please tick all boxes which describe your job responsibilities

☐ Short-term software procurement

☐ Medium-term software procurement

☐ Long-term software procurement

☐ Training

☐ Software development

☐ Distribution licence design or approval for software developed in-house

II. Description of institution (2 of 12)

Q8 Type of institution

☐ Higher Education

☐ Further Education

Q9 Name of institution

In what follows, the term "organisation" is used for the entity for which you are providing responses. If you are able to respond on behalf of the whole institution, please do so, even if you have to make rough estimates.

Q10 Approximate number of students that your organisation serves (undergraduate and graduate)

Q11 Approximate number of academic and academic-related staff that your organisation serves

Q12 Approximate number of other staff that your organisation serves

Q13 Approximate number of separate computers that your organisation provides software and software support for

• desktops
• servers

Please feel free to ignore questions 14 and 15 if you feel that you do not have the information or are unwilling to provide it.

Q14 Approximate annual software *license* budget of your organisation for 2002-2003

Q15 Approximate annual software *support* budget (development, training, etc.) of your organisation for 2002-2003

III.IT strategy questions (3 of 12)

For these questions, Open Source Software is defined as software which is released under one of the OSI approved licenses. These include, but are not limited to GPL, LGPL, BSD, MIT, Mozilla Public License, Apache Software License, Sun Public License, Academic Free License. For a more complete list, see http://www.opensource.org/licenses/index.php

You can add further details in the Details/Comment box at the end of each question, if you feel your responses need explanation or qualification. These are complex issues and additional information will add value to the survey.

In what follows, the term "organisation" is used for the entity for which you are providing responses. If you are able to respond on behalf of the whole institution, please do so, even if you have to make rough estimates.

Q16 Does your organisation have an IT policy or strategy that addresses whether to examine OSS as an option when procuring software?

☐ Our organisation has no IT policy/strategy

☐ Our organisation has an IT policy/strategy, but OSS is not mentioned

☐ Our organisation has an IT policy/strategy of not using OSS software

☐ Our organisation has an IT policy/strategy that explicitly considers OSS as an option

☐ Our organisation has an IT policy/strategy in which OSS is the preferred option

☐ Our organisation has an IT policy/strategy in which OSS is the only option

Details or Comments

III.IT strategy questions (4 of 12)

Q17 What is your organisation's average level of awareness of Open Source Software?

☐ Very few are more than slightly aware of open source concepts

☐ Open source software has been looked into by quite a number of people, or by a few in some depth, but in general further information is needed before deploying

☐ Open source has been investigated and decisions have been made on deployment

Details or Comments

Q18 What is your organisation's overall level of skill with open source software? This question is concerned with skill in using and administering open source software packages and software and not with the open source software development process

☐ There are very few with these skills

☐ A moderate number of staff are skilled with at least one open source software package

☐ Significant numbers of staff are skilled with more than one open source software package

Details or Comments

III.IT strategy questions (5 of 12)

Q19 What is your organisation's overall level of skill with the open source software development process? This question is concerned with familiarity with how open source software is developed, where to go for support, how bugs are fixed, etc.

☐ There are very few with these development skills

☐ A moderate number of staff are somewhat familiar with the OSS development process

☐ Significant numbers of staff are skilled with the entire open source software development process

Details or Comments

Q20 Have you deployed, or do you intend to deploy, open source software in a significant way within your organisation? If so, what time frame do you have for deployment?

☐ Decided not to deploy open source software

☐ Have already deployed open source software but in a rather limited way

☐ Have already deployed open source software in significant ways/quantities

☐ Deploying open source software this year

☐ Deploying open source software within years

☐ No decision made yet

Details or Comments

III.IT strategy questions (6 of 12)

Q21 If your organisation has already deployed open source software, in which areas has it been deployed? Please select the best description of your institution's involvement with this software on a scale of 1 to 4

Legend
1 = Casual use of OSS by individuals on an occasional basis
2 = Organisation reliant on certain OSS products, but no involvement in development
3 = Organisation reliant on certain OSS products, and occasional contributor to their development
4 = Organisation is mainstream OSS developer

Operating Systems   1 2 3 4
Networking systems (DNS servers, web servers, email services, firewalls, etc.) 1 2 3 4
Information systems (portal frameworks, Virtual Learning Environments (VLE), content management systems (CMS), library management systems, digital repositories/archives) 1 2 3 4
General-purpose user desktop systems (e.g., office productivity, multimedia tools, email and web clients, statistical packages, databases), web applications, and web services 1 2 3 4
Specialised application packages for subject-based communities (e.g. archaeological statistics programs, zoological databases) 1 2 3 4
Software development environments 1 2 3 4
Other... 1 2 3 4

Details or Comments

III.IT strategy questions (7 of 12)

Q22 If your organisation has plans to deploy open source software in the future, in which areas will it be deployed? Please select your the best description of your institution's anticipated involvement with this software on a scale of 1 to 4

Legend
1 = Casual use of OSS by individuals on an occasional basis
2 = Organisation reliant on certain OSS products, but no involvement in development
3 = Organisation reliant on certain OSS products, and occasional contributor to their development
4 = Organisation is mainstream OSS developer

Operating Systems 1 2 3 4
Networking systems (DNS servers, web servers, email services, firewalls, etc.) 1 2 3 4
Information systems (portal frameworks, Virtual Learning Environments (VLE), content management systems (CMS), library management systems, digital repositories/archives) 1 2 3 4
General-purpose user desktop systems (e.g., office productivity, multimedia tools, email and web clients, statistical packages, databases), web applications, and web services 1 2 3 4
Specialised application packages for subject-based communities (e.g. archaeological statistics programs, zoological databases) 1 2 3 4
Software development environments 1 2 3 4
Other... 1 2 3 4

Details or Comments

III.IT strategy questions (8 of 12)

Q23 If your institution currently has no plans to deploy OSS, would you be open to the idea of using OSS?

Yes

No

Why?

Details or Comments

Q24 What proportion of software packages deployed in your organisation is available under an open source license?

Percentage of packages deployed

Approximate number of copies

III.IT strategy questions (9 of 12)

Q25 The following table is a selection of open source software packages. Please indicate whether you are Aware of or have Deployed each package. Please also indicate the range of use of the application, by ticking all scenarios that apply.

Legend
A = Aware
D = Deployed
1 = Casual use on an individual basis
2 = Used only by advanced technical staff
3 = Used in some subject-based communities
4 = Used across the institution, on all or most cluster computers, staff workstations, etc.

GNU/Linux (Operating system) 1 2 3 4
OpenOffice.org (Office package) 1 2 3 4
Mozilla/Konqueror (Web browsers) 1 2 3 4
Evolution (Outlook clone) 1 2 3 4
Octave (Matlab clone) 1 2 3 4
LaTeX (Typesetting language) 1 2 3 4
MySQL/PostgreSQL (Database servers) 1 2 3 4
Apache (Web server) 1 2 3 4
Samba (Windows-compatible file sharing) 1 2 3 4
Gaim (Instant messenger client) 1 2 3 4
VI/Emacs (Text editors) 1 2 3 4
Other... 1 2 3 4

Details or Comments

Q26 On the whole, what was the main reason you chose to use these OSS packages over proprietary analogues?

☐ Saving on Total Cost of Ownership (TCO)

☐ Able to modify source for specific reason

☐ Better response with bug fixes and/or support

☐ Less reliance on a particular vendor

☐ Better interoperability with other products due to open standards

Details or Comments

III. IT strategy questions (10 of 12)

Q27 What percentage of your budget do you estimate was spent on open source software (including deployment, support and maintenance)?

Details or Comments

Q28 What are your biggest concerns for OSS? (tick all that apply)

☐ Legal issues including licensing

☐ Interoperability and migration concerns

☐ Identification, categorisation and availability of relevant software

☐ How to archive and manage ongoing development of software after projects are finished in-house

☐ Investigation and assessment of open source software take-up in comparable environments around the world

☐ 3rd party support

Details or Comments

Q29 What is your current source of information on OSS?

Details or Comments

IV. IT development questions (11 of 12)

Q30 Does your institution develop software in-house? (If not, it is only necessary to answer the first question on the page, then press 'Next')

Yes

No

Details or Comments

Q31 What best describes your policy on licensing for software you develop in-house?

☐ Have considered it, and decided against open source

☐ Have never considered the issue, don't have an institutional licensing policy

☐ Put out programs for free, don't want to rock the boat by checking legality

☐ Have sorted out legal issues, and have licensed programs according to...

(supply licence details)

Q32 Do your developers use OSS distribution licenses?

☐ Almost always

☐ Sometimes

☐ Never

Details or Comments

Q33 Do your developers share source code with developers at other institutions?

☐ Almost always

☐ Sometimes

☐ Never

Details or Comments

Q34 Does your organisation solicit legal advice on intellectual property protections related to software developed in-house?

☐ Almost always

☐ Sometimes

☐ Never

Details or Comments

Q35 Please write any additional comments or suggestions here:

V. Participation in further study (12 of 12)

Q36 Would you be willing to be contacted for participation on further research into this subject?

Yes

No