

Managing institutional engagement with open source

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OSS Watch provides unbiased advice and guidance about free and open source software for UK higher and further education.

- strategic IT decision-makers
- IT managers and technical staff
- software developers
- academic end-users

OSS Watch is funded by the Joint Information Systems Committee (JISC) and based within the Research Technologies Service at the University of Oxford.

Reasons for considering open source

The top 3 reasons given in OSS Watch national scoping study:

- cost
- interoperability
- security

Interoperability was the number one reason for higher education.

Policy revision and practical change

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Change can be top-down or bottom-up.

- Top-down change works best if it codifies best practice and draws upon pre-existing motivations.
- Bottom-up change works best if it seeks to be consensual, working with **all** stakeholders.

UK government policy

Open Source Software: use with UK government

<http://www.govtalk.gov.uk/policydocs/policydocs.asp>

- 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.

UK government policy (2)

- 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.

JISC policy

Policy on Open Source Software for JISC Projects and Services

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

- Advice and guidance to the communities JISC serves must be neutral and unbiased, and must not discriminate between open source and closed source software products.
- Where open source and closed source software are evaluated against one another, value for money over the expected lifetime of the system must be compared.

JISC policy (2)

- The ownership of code which is to be developed in joint projects must be established before work begins.
- Projects must maintain an IPR register, listing all contributors to their software and who owns the copyright on contributions.
- Copyright of software, documentation, design materials, user interface and 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.

Local example: Oxford University Computing Services

The issue: **Participation**

- Open source software used at numerous points in the infrastructure.
- Sysadmins sometimes find bugs, but because they have access to the source code they find it easy to write patches.
- However, the university owns the intellectual property rights (IPR) in this code.

How can these patches be contributed back to the community legally?

Local example: OUCS

- Establish a clear set of goals.
- Involve all stakeholders.
- Explore current policy first to reach goals.

Outcome:

- Path to participation in open source projects for staff now clear and well understood.

Local example: lessons

- Work within current university policy wherever possible.
- Support best practice for software development at all times.
- Contribute to an increase in local understanding of open source issues.

Wider implications and observations

- Build on best practice wherever possible.
- Work with institutional motivations.
- Consensual change is not dramatic.
- Sensible government policy helps institutions achieve their goals.

Further information

For further information on OSS Watch, visit
<http://www.oss-watch.ac.uk/> or write to
info@oss-watch.ac.uk

UK government open source policy:

<http://www.govtalk.gov.uk/policydocs/policydocs.asp>

JISC open source policy:

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