Open source - what is it good for?

Randy Metcalfe

OSS Watch

These are the points to take away from this talk:

- open source software is a viable and cost-effective option
- good policy is based on sound research and best practice
- JISC's open source software policy is good policy
- good policy needs to be discussed, understood, and embedded into current practice

- OSS Watch
- background to the JISC policy
- the policy
- 3 scenarios

OSS Watch: the UK open source software advisory service

OSS Watch provides unbiased advice and guidance on 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.

OSS Watch website

OSS Watch is *not* an advocacy group. There are many other groups across the world who fulfil the advocacy function, e.g.:

- Free Software Foundation
- Open Forum Europe
- SchoolForgeUK
- and many more
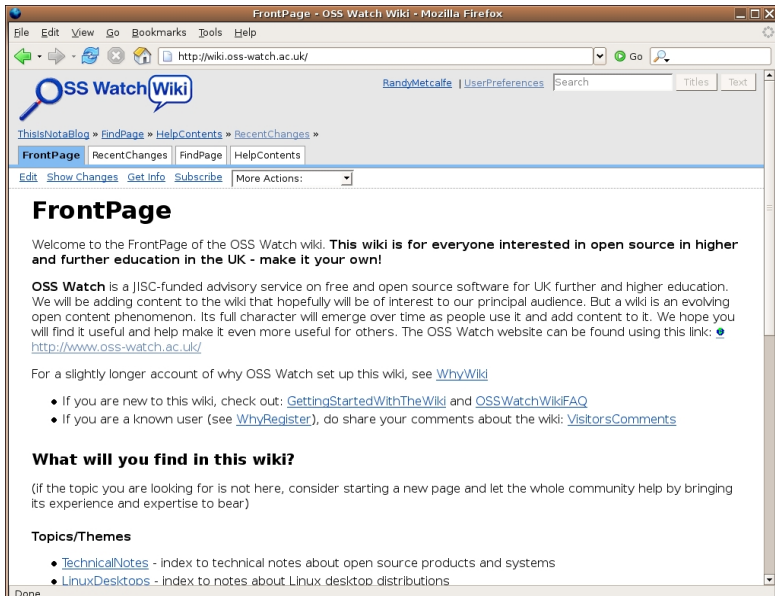
OSS Watch's role is to promote awareness and understanding of the legal, social, technical and economic issues that arise when educational institutions engage with free and open source software.

OSS Watch activities

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- Website http://www.oss-watch.ac.uk/
- Wiki http://wiki.oss-watch.ac.uk/
- Briefing notes and guidance materials
- Conferences and workshops
- Consultation
- Research
    - national survey on open source software use in HE and FE
    - JISC study on models for sustainability in open source projects

Open source and sustainability, Oxford, 10-12 April 2006

OSS Watch Wiki

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http://wiki.oss-watch.ac.uk/

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FrontPage

Welcome to the FrontPage of the OSS Watch wiki. **This wiki is for everyone interested in open source in higher and further education in the UK - make it your own!**

OSS Watch is a JISC-funded advisory service on free and open source software for UK further and higher education. We will be adding content to the wiki that hopefully will be of interest to our principal audience. But a wiki is an evolving open content phenomenon. Its full character will emerge over time as people use it and add content to it. We hope you will find it useful and help make it even more useful for others. The OSS Watch website can be found using this link: http://www.oss-watch.ac.uk/

For a slightly longer account of why OSS Watch set up this wiki, see WhyWiki

- If you are new to this wiki, check out: GettingStartedWithTheWiki and OSSWatchWikiFAQ
- If you are a known user (see WhyRegister), do share your comments about the wiki: VisitorsComments

What will you find in this wiki?

(if the topic you are looking for is not here, consider starting a new page and let the whole community help by bringing its experience and expertise to bear)

Topics/Themes

- TechnicalNotes - index to technical notes about open source products and systems
- LinuxDesktops - index to notes about Linux desktop distributions

Done

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- Government Open Source Software Trials: final report http://www.cabinetoffice.gov.uk/e-government/policy_guidance/index.asp
- Open Source Software: Use within UK Government http://www.govtalk.gov.uk/policydocs/
- Becta report - Open Source Software In Schools http://www.becta.org.uk/corporate/press_out.cfm?id=4681N
- BBC use of open source http://www.bbc.co.uk/opensource/
- OSS Watch http://www.oss-watch.ac.uk/

UK government initiatives

Office of Government Commerce software trials: Sept 2003
- October 2004. Key conclusions:

- Open Source software is a viable and credible
  alternative to proprietary software for infrastructure
  implementations, and for meeting the requirements of
  the majority of desktop users; no significant obstacles
  were noted for the adoption of Open Source in
  infrastructure developments

- Adoption of Open Source software can generate
  significant savings in hardware and software costs for
  infrastructure implementation, and reduce the licensing
  costs and hardware refresh requirements for desktop
  implementation

The second and current version of the UK government policy was issued on 28 October 2004:

- 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 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.

Becta study conducted in 2004-5, published immediately after the May election on 13 May 2005:

- Our study indicates that OSS can be implemented successfully as a networking solution within the technical infrastructure and with obvious cost benefits. It is important to adopt a strategic approach to financial planning in which any savings are then allocated to best meet the wider educational aims of the school.

- The use of office-based OSS such as StarOffice and OpenOffice offers a cost-effective alternative to proprietary office software.

BBC use and development of open source

SS Watch

JISC sets up a pilot open source advisory service

In April 2003, JISC issue an ITT for:

- a pilot advisory service designed to collate and disseminate information about the availability, and the respective strengths and weaknesses, of Open Source Software products relevant to UK Further and Higher Education.

The JISC *Policy on Open Source Software for JISC Projects and Services* was initially drafted by Sebastian Rahtz and Stuart Yeates of OSS Watch. It is based on

- UK government open source policy
- well-established best-practice in software engineering and management of intellectual property rights (IPR)
- current IT best-practice within JISC and higher and further education more broadly

It was confirmed by the principal JISC committee in February 2005, but not published on the JISC website until September 2005.

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

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- 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.

- Calls for funding, the bidding process, the award of funding, the administration of awarded funding and the evaluation of funded projects and services must not discriminate between between open source and closed source software, unless the purpose of the projects or services specifically requires it.

- 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.

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

- Projects must state in their bid whether they foresee the project continuing beyond the timespan of funding, and if so whom they see participating in the project.
- Projects should engage with end users and other parties to encourage and build self- sustaining communities.
- Projects should accept bug reports, patches, translations and feedback from contributors outside the project.

- project drafting bid against a JISC ITT
- funded project working to produce sustainable open source software
- service deploying open source infrastructure

Bids need to demonstrate that they understand the IPR issues surrounding software development by

- making clear the exploitation route for any software generated
- identifying the OSI-certified licence to be used for any software released
  - or justify why a non-OSI licence should be used
- making clear how they will be building a developer or user community

Tip: why not contact OSS Watch when drafting the bid to seek unbiased advice and guidance about free and open source software.

Software projects need to ensure that they

- maintain an IPR registry that clearly identifies the provenance and licence restrictions on any code entering the project
- encourage the submission of bug reports and patches from the wider development and user community
- release early and release often
- work towards a sustainable model of ongoing maintenance and further development of the software

Tip: why not contact OSS Watch as the project develops for ongoing support and guidance on best practice in free and open source software development methodologies.

JISC services that are procuring and deploying software for their service infrastructure need to

- consider open source alternatives in the procurement process
- compare open source against proprietary options on a value for money basis over the expected lifetime of the system

Tip: why not contact OSS Watch for suggestions of open source alternatives and the means to compare them adequately. Remember, OSS Watch always recommends that you go with the best solution that suits your needs, regardless of whether or not it is open source.

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For more information on open source software development and deployment, visit http://www.oss-watch.ac.uk/ or write to info@oss-watch.ac.uk