

# Institutional engagement with open source

Randy Metcalfe

OSS Watch

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# Key messages...

Institutional  
engagement  
with open  
source

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- open source is more than just a copyright licensing paradigm
- universities across the UK use open source software regularly
- institutional engagement with open source means more than just using it
- Oxford is an exemplar of good practice (in some areas)

# OSS Watch: the UK open source software advisory service

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- unbiased advice and guidance on free and open source software for UK higher and further education
- funded by the Joint Information Systems Committee (JISC) and based within the Research Technologies Service at the University of Oxford
- promotes awareness and understanding of the legal, social, technical and economic issues that arise when educational institutions engage with free and open source software

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

# Open source is...

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- a copyright licensing paradigm
- a marketing term for *free software*
- a software development methodology
- all about community
- a business model

# Open source is also...a warm puppy

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# Do universities in the UK use open source software?

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# YES

# What open source software do they use?

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- Apache web server
- OpenOffice
- Exim
- Firefox
- Moodle
- Plone/Zope
- Eclipse
- Linux: RedHat, SuSE, Debian, etc.
- MySQL
- Python
- and much more

# How do they use it?

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- part of the IT strategy of the institution
- a cost-cutting measure for cash strapped departments
- individual preference



# Policy versus Practice

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**2006 - OSS Watch survey of IT Directors**

- institutional requirements
- user requirements
- **evidence based decision-making**

Business Readiness Rating <http://www.openbrr.org/>  
Open Source Maturity model

<http://www.navicasoft.com/pages/osmm.htm>

# And the result?

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The screenshot shows the Moodle 1.6 website in a Mozilla Firefox browser window. The browser title is "Moodle - A Free, Open Source Course Management System for Online Learning - Mozilla Firefox". The address bar shows "http://moodle.org/". The page features a large orange header with the Moodle logo and the text "1.6 ready for use!". Below the header, there is a "Welcome to Moodle!" section with a graduation cap icon and a paragraph describing Moodle as a free, open source CMS. To the left, there is a "Main Menu" with links to Free Support, Documentation, Donations, Download Moodle, Modules and plugins, Themes, Moodle Buzz, Moodle Sites, Moodle Statistics, and Moodle News. Below the menu is a "Latest News" section with three entries from Martin Dougiamas. To the right, there is a "Search" box, a "Login" form with fields for Username and Password, and a "Course categories" section. At the bottom right, there is a "Media Touch 2000" logo and a list of services for Moodle Partner Italia.

**Moodle 1.6 ready for use!**

**Welcome to Moodle!**

Moodle is a course management system (CMS) - a free, [Open Source](#) software package designed using sound [pedagogical principles](#), to help educators create effective online learning communities. You can download and use it on any computer you have handy (including webhosts), yet it can scale from a single-teacher site to a 50,000-student University. This site itself is created using Moodle, so check out the [Moodle Demonstration Courses](#) or read the latest [Moodle Buzz](#).

**Moodle Community**

Moodle has a large and diverse user community with [over](#) 

**Main Menu**

- Free Support
- Documentation
- Donations
- Download Moodle
- Modules and plugins
- Themes
- Moodle Buzz
- Moodle Sites
- Moodle Statistics
- Moodle News

**Latest News**

20 Jun, 03:39  
Martin Dougiamas  
Moodle 1.6 goes gold!  
[more...](#)

15 Jun, 20:52  
Martin Dougiamas  
Moodle.org is now running Moodle 1.6 on a new server  
[more...](#)

12 Jun, 11:25  
Martin Dougiamas

**Search**

Search this site

**Login**

Username:

Password:

Login

[Create new account](#)  
[Lost password?](#)

**Official Moodle Partner:**

**Media Touch 2000**

**moodle partner italia:**

- installazione
- supporto
- hosting
- sviluppo
- consulenza
- realizzazione corsi

**Course categories**

Community Discussion

**October 2003** no significant evidence of use in UK FE colleges

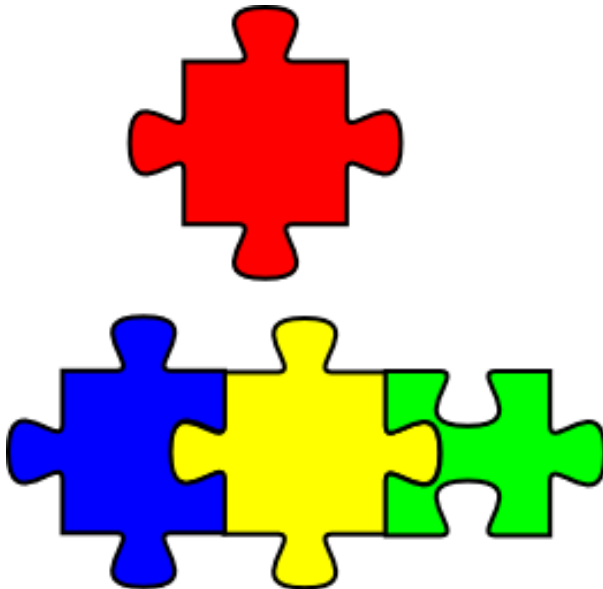
**March 2006** 56% of further education colleges report they are using Moodle

*OSS Watch surveys of IT Directors 2003 and 2006*

# Institutional engagement: what does it mean?

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# Open source is not **free beer**

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## Engagement entails commitment

- The Open University has committed to a GBP 4 million project of direct development of **core** Moodle components.
- This is in addition to the money earmarked for internal development (e.g. OU styling), training, support, and roll-out to all staff.

# Participating in the open source community

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- support for institutional deployments
- staff development and retention
- international profile
- research and development
- *profit?*

# Open source exploitation: LAMS at MacQuarie University, Australia

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## Learning Activity Management System

- began as proprietary software
- full code acquired by MacQuarie University
- re-released as open source software under GPL
- Dual licence and support/consultation exploitation route
  - LAMS Foundation <http://www.lamsfoundation.org/>
  - LAMS International <http://www.lamsinternational.com/>



# Does the University of Oxford use open source software?

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# YES

# What open source software does Oxford use?

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- Apache web server
- OpenOffice
- Exim, BIND
- Firefox, Thunderbird
- Moodle
- Plone/Zope
- Eclipse
- Linux: RedHat, SuSE, Debian, etc.
- MySQL
- Python, Perl, PHP
- and much more

# How does Oxford use it?

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- part of the IT strategy of the institution - **no**
- cost-cutting measure for departments - **yes**
- individual preference - **yes**

Open source software is not mentioned in the (3rd) draft ICT Strategy for the University of Oxford.

- <http://www.ict.ox.ac.uk/strategy/plan/>

Perhaps an ICT Strategy should not mention software at all.

*How then does rational consideration of open source alternatives become part of the ICT procurement process?*

# Engagement challenge: contributing code

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- (for most of you) copyright on the code you write belongs to your employer
- procedures to gain institutional approval for contribution of code may be so difficult that in practice few bother engaging with them

Do **you** know the route to contribution?

## No change to University of Oxford policy.

Staff who wish to contribute to open source projects should seek the permission of the Director before doing so.[...] A register of open source projects will be maintained, which will list

- The name(s) of staff involved
- The details of the project (description, URL etc)
- The relevance to OUCS service
- The licence under which contributions will be issued
- A summary of the degree of involvement

Staff will be asked to update the register once a year and confirm their involvement. The Director will include a summary of the register in the OUCS annual report.

## Open Source Software: Use within UK Government

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

## JISC Policy on Open Source Software for JISC Projects and Services

[http://www.jisc.ac.uk/index.cfm?name=about\\_policy](http://www.jisc.ac.uk/index.cfm?name=about_policy)

Issued in 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 open source policy (2)

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- 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 open source policy (1): services

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Issued in September 2005 as an implementation of the UK government policy.

- Advice and guidance must be neutral and unbiased.
- Project funding process must not discriminate between open source and closed source software, unless the purpose of the projects or services specifically requires it.
- Value for money over the expected lifetime of the system must be compared.

# JISC open source policy (2): software development

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- Projects must maintain an IPR register.
- Ownership of code in joint projects must be established before work begins.
- 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.

# JISC open source policy (3): engaging the community

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- Projects must state in their bid ... 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.

# The future of open source at Oxford

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- Research Services
- Legal Services
- ISIS Innovation
- IT staff
- researchers
- students

# Key messages...

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- Oxford is an exemplar of good practice (in some areas)

# And don't forget the warm puppy

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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](mailto:info@oss-watch.ac.uk)



warm puppy photo Steve Starer, <http://www.flickr.com/photos/21044097@N00/129340743/>,  
Creative Commons Attribution Licence