



**Institutional Engagement:
open source software
use in
UK universities and colleges**

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Key Messages

- 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



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In this talk

- OSS Watch
- open source use
- aspects of engagement



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OSS Watch

- national advisory service for UK colleges and universities
- to raise awareness and understanding of the issues that arise when institutions engage with open source software
- based at the University of Oxford
- funded by Joint Information Systems Committee (JISC)



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OSS Watch activities

- briefing notes on key issues in open source development and deployment
<http://www.oss-watch.ac.uk/>
- practical support for JISC's open source software development projects (approx. 200)
- working with technology transfer units to raise awareness and understanding of open source licensing and business models



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Open source is...

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



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OSS Watch

Do universities in the UK use OSS?

- yes
 - Five years of direct contact
 - OSS Watch Scoping Study 2003
 - OSS Watch Survey 2006



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SS Watch

What open source software is used?

- the usual suspects
 - Apache
 - Exim
 - Eclipse
 - MySQL
 - Plone
 - Linux
 - Firefox
 - and many, many more



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SS Watch

How is open source software used?

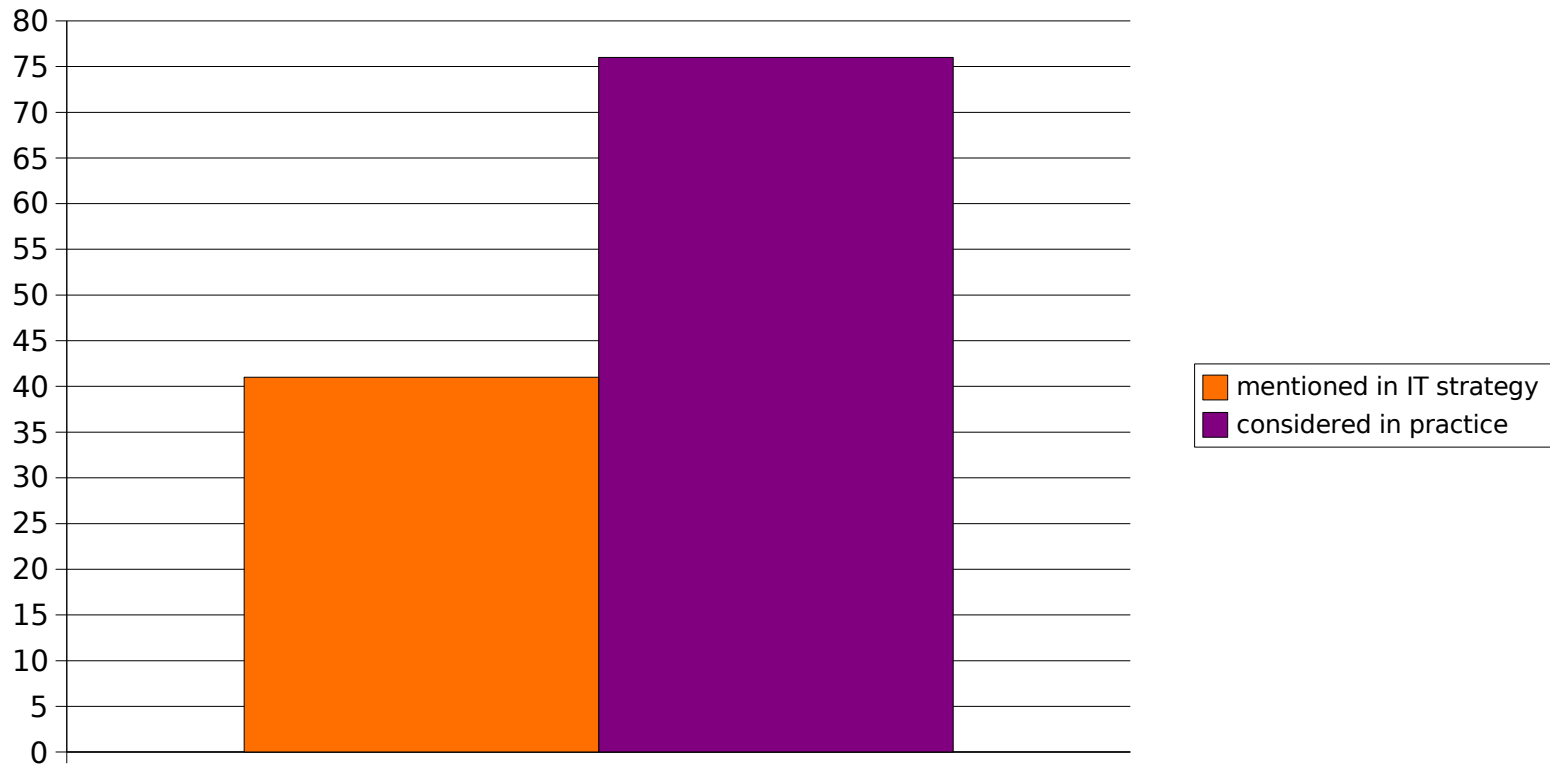
- part of the IT strategy of the institution
- a cost-cutting measure for cash-strapped departments
- individual preference



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Policy versus Practice



source OSS Watch Survey 2006





OSS Watch

Example: rise of Moodle in FE

- 2003: Moodle use does not appear in the OSS Watch Scoping Study
- 2006: 56% of FE colleges report they are using Moodle or trialing it





SS Watch

So what does *engagement* mean?

- it cannot *merely* mean acknowledgement in an institutional policy
- nor can it *merely* mean use
 - an institution could engage meaningfully with open source options in a procurement process but still end up choosing a proprietary solution as the best solution in that case; or
 - an institution could deploy open source software merely as a (dubious) cost-saving measure





Example: Open University

VLE procurement process:

- institutional requirements
- user requirements
- evidence-based decision-making
 - Open Business Readiness Rating
<http://www.openbrr.org/>
 - Open Source Maturity Model
<http://www.navicasoft.com/pages/osmm.htm>



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Example: Open University

VLE deployment process

- 4 million pounds committed to direct development of core Moodle components (this is in addition to money earmarked for internal development, e.g. OU styling, training, support, and roll out to all staff)





So what *does* engagement mean?

- procurement
- deployment
- staff development and career progression
- business models for knowledge transfer
- community development
- public relations



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Continuing Professional Development

- CPD in the open source community involves
- training through use (as well as courses)
 - *time* to follow and participate in key user/developer groups
 - contribution of documentation, patches, etc. for ongoing development of the software





Copyright

- contracts for most IT staff clearly indicate that copyright for outputs (documentation or code) belongs to their employer
- only the copyright holder has the power to assign or license their copyright material to some other party
- procedures to gain institutional approval for contribution of code can be challenging



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Contributing code

- are you the copyright holder?
- has the copyright holder given you permission to contribute code?
- is there a public procedure for obtaining permission to contribute code?
- is that procedure so onerous that no one bothers to use it?





Example: University of Oxford

- staff who wish to contribute to open source projects must seek the permission of the Director before doing so
- a register is maintained of staff involved, projects, relevance to OUCS, licence, degree of involvement
- staff need to update the register yearly



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Example: University of Oxford

- procedures need to be public
<http://www.oucs.ox.ac.uk/internal/procedures/ossoucs.xml>
- participation needs to be public
<http://www.oucs.ox.ac.uk/internal/annrep/annrep0506/index.xml.ID=service#index.xml-div-id2671820>





Encouraging good practice

- 78% of HE institutions say their staff do not submit patches to open source projects
- 21% of HE institutions do not know whether their staff submit patches to open source projects
(source OSS Watch Survey 2006)

We can do better!



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Open source engagement

- procurement and deployment (IT strategy)
- ongoing open development
- copyright policy
- conditions of employment
- business models for knowledge transfer
- public relations



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