

## Using open source in FE

Steve Lee  
OSS Watch

[info@oss-watch.ac.uk](mailto:info@oss-watch.ac.uk)  
<http://www.oss-watch.ac.uk>

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## OSS Watch

- Open source advisory service
  - Procurement, engagement, development, legal
  - Consultancy, events, community development
  - Publications and surveys
- Non-Advocacy
- Free of charge to FE and HE

## It starts with a licence...



- Software released under an OSI approved licence
- In practice, approx. same as free software (FSF)

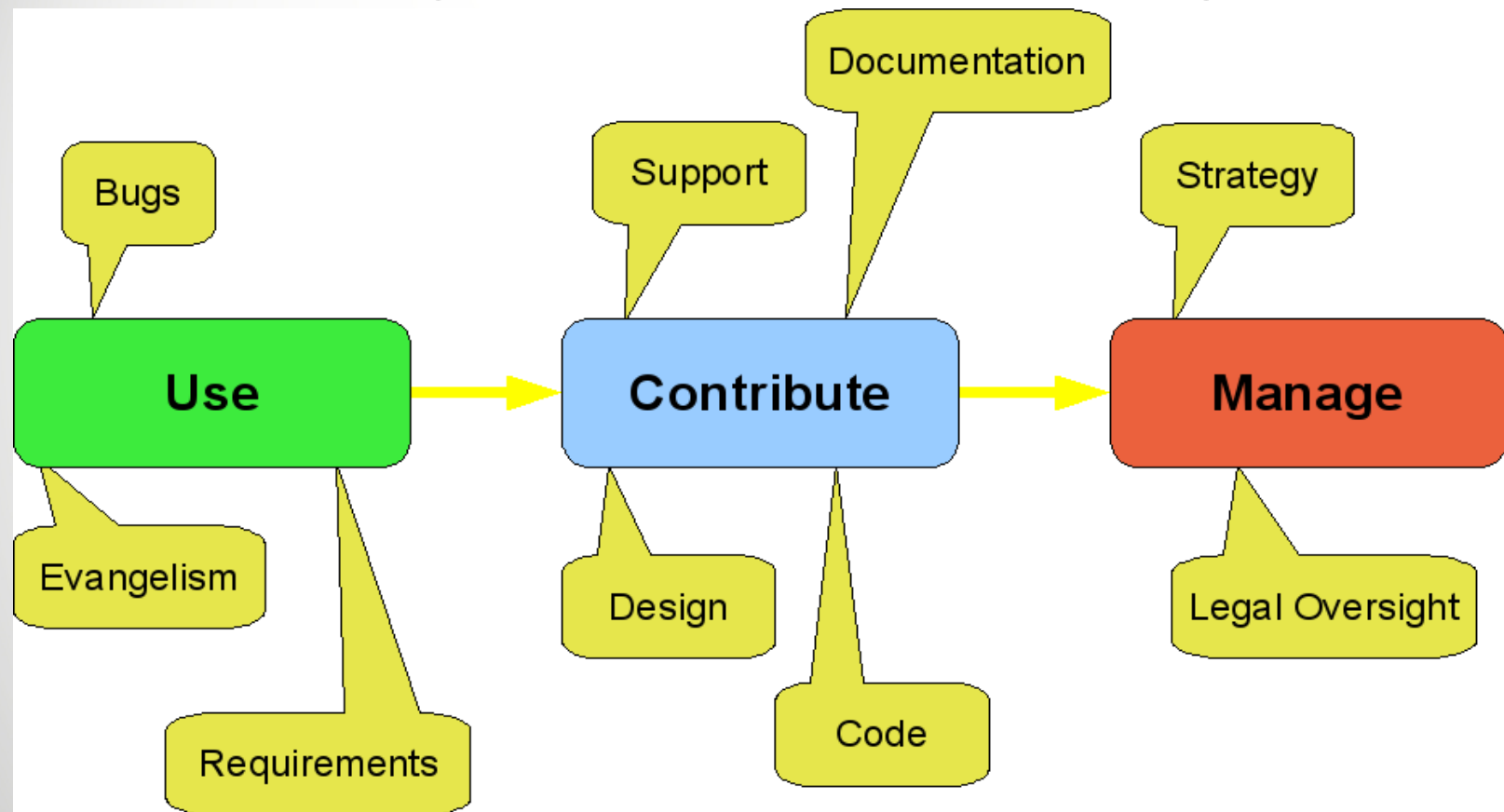
## Open source definition

- Free redistribution
- Source code
- Derived works
- Integrity of author's work
- No discrimination against persons or groups
- <http://www.opensource.org/docs/definition.php>

## But it's much more than a licence...

- “The real value of open source software is that it allows communities to work together and solve problems”  
[7] I. Wladawsky-Berger, IBM
- Sustainable communities
- Open formats and standards
- Open development

## Project Community



## Some myths (1)

- Myth
  - Anarchic projects managed by volunteers
  - “Sandals and woolly hats”
- Facts
  - Linux Foundation board: Novell, Oracle, Fujitsu, Intel, IBM, Hitachi, HP, AMD, NEC, Texas Instruments, Motorola
  - Sun: 34+ projects. Mozilla: AOL, Google
  - UK Open source consortium: 56 members

## Some myths (2)

- Myth
  - Free (as in free beer)
- Facts
  - Costs: staff, support, training...
  - 50% companies deploying more than 25 open source products, > 20% savings in IT budget [1] InfoWorld
  - 1% companies costs went up [1]



## Some myths (3)

- Myth
  - You can't generate income from OSS
- Facts
  - Worldwide revenue \$1.8bn in 2006 rising to \$5.8bn in 2011 [5] IDC report

## Some myths (4)

- Myth
  - You have to engage with the project if you use open source
- Facts
  - You can outsource all support and development services if you want to

## OSS always right? (1)

- No
  - Consider open source alongside closed source and make an informed decision
- Some key pitfalls with open source
  - You need the right person or company to administer and support it
  - Open source projects sometimes lack support mechanisms and/or resources (docs, communities, etc.)

## OSS always right? (2)

- Sometimes open source is just a marketing tool
  - Restricted open source version, all features in closed source version
  - Closed development methodology

## Why? Official Guidelines

- **UK Government** will consider OSS solutions alongside proprietary ones in IT procurements. Contracts will be awarded on a value for money basis [2]
- The **[EC]** will consider OSS solutions the same way as proprietary ones in IT procurements. Contracts will be awarded on a value for money basis [3]
- **JISC**-funded projects must not discriminate between open source and closed source software, unless the purpose of the projects or services specifically requires it [4]

## Market reality

- “Open source is the most significant all-encompassing and long-term trend that the software industry has seen since the early 1980s” [5] IDC report
- "By 2012, more than 90 percent of enterprises will use open source in direct or embedded forms" [6] Gartner report

## Your Enterprise Needs?

- Managing risk
- Flexibility
- Interoperability & integration
- Avoidance of lock-in
- Viable alternatives

## Open Source in HE and FE

- National survey 2008
  - ICT Directors from UK HE and FE institutions
  - 454 FE/FE+HE
  - 161 HE
  - 19% response rate



## Limited resources in FE

- Typical FE ICT departments employ between 7 and 10 staff
- 7 times larger in HE
- FE staff lower technical qualifications on average
- Traditionally, FE less open source friendly than HE, but now you are catching up

## Policy and Practice

- Policy
  - In 2006, 30% institutions mentioned open source
  - In 2008, 57%
  - Staff contributions regulated in only 14%
- Practice
  - In 2006, 77% considered open source
  - In 2008, 87% (but only 15% equally to closed source)

## Servers increasingly open

- All or almost all closed source
  - Reducing from 56% (2006) to 40% (2008)
- Mostly closed source
  - Increasing from 20% (2006) to 44% (2008)
- Half open and half closed source
  - Increasing from 3% (2008) to 11% (future)
- Similar trend on desktops

## Criteria for procurement in FE

- Top criteria
  - Performance, interoperability with other products, familiarity and TCO (servers)
  - Performance and avoid lock-ins, TCO (desktops)
- Bottom criteria
  - Ideological reasons and migration costs (servers)
  - Migration costs and legal issues (desktops)

## Reasons to reject OSS given by FE

- Top reasons on servers
  - Lack of staff expertise and support
  - Poor quality
- Top reasons on desktops
  - Not what users want
  - Lack of staff expertise
  - No solution for our need
  - Lack of support

## What is needed in tenders?

- Focus on user needs not products or technology
- Recognise customisation is always needed
- Recognise the value of reuse through collaboration

## What is needed for adoption?

- Understand the open source development model
- Engage with the OSS development model (not mean just programming)
- Become aware of *professional* and *true* open source companies

## Conclusions

- OSS Watch is here to help you [info@oss-watch.ac.uk](mailto:info@oss-watch.ac.uk)
- Open source starts with a licence, but works thanks to the community and development practices.
- System integrators play an important role
- Volunteers, small and big businesses... but are they reaching FE?
- Trend is clearly towards more open source