Open Source in Academia
uPortal in Context

Presented by Jim Farmer
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at

Open Source Deployment and Development
Thursday, 11 December 2003
OSS Watch at Oxford University, Oxford, UK

Why use open source software?

- Features and functions needed by academia not available from commercial products
- Cost containment
- Community process, community benefit
  - Open standards
  - Shared research and experience
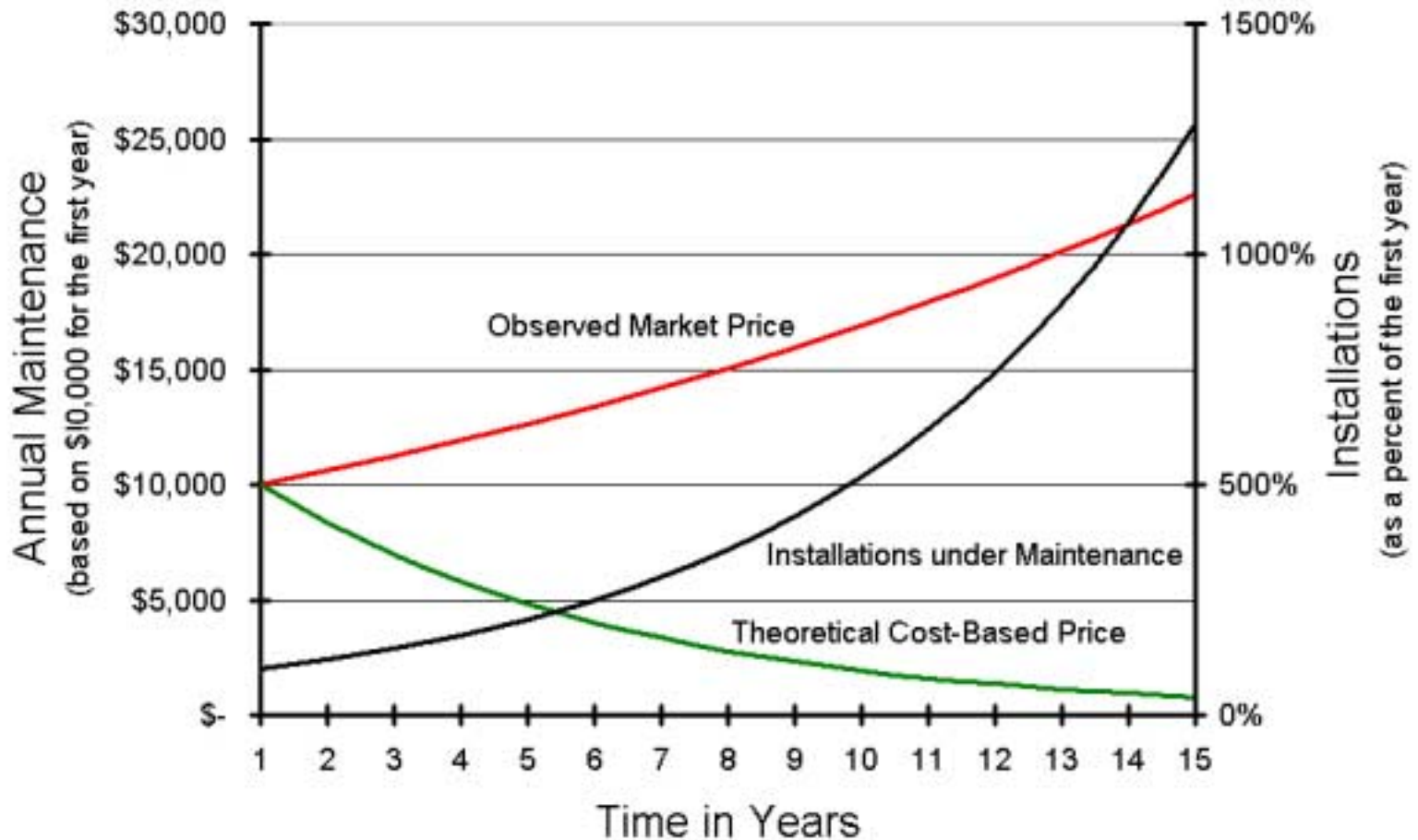
Higher education features

- uPortal
  - Full internationalization
  - "Pushed" layout fragments controlled by faculty
- Colloquia (Bill Olivier)
  - Role of mentor or tutor
- Bodington
  - Residential campus metaphor
- Content Management
  - Digital libraries v. business documents

Cost containment

- Unit price of commercial software appears to increase with time and number of units sold.

- Annual maintenance costs increasing.
  "From 10% to 22% of increasing license list price."

  Oracle Corporation product

- Forced upgrades

  _____

  Open source may influence features and pricing of commercial software

Higher education software cost

Based on observations by Joseph Chalmers, then of American Management Sustems, now CEO of ePortaro, Inc.

Cost of annual maintenance

Based on observations by Joseph Chalmers, then of American Management Systems, now CEO of ePortaro, Inc.

Observations about costs

- Open source may reduce software investment costs.
- The primary costs of software are:
  - Annual maintenance
  - Local integration with other applications
- Long-run application maintenance costs diverge from expectations.
  - Cumulative complexity?
  - Feature creep?
  - Business process differences or changes?
  - Changing expectations of users?

Models for open source support

- Developer contributions
  - Columbia's CuCMS, Yale's CAS
- Cooperatives, special purpose organizations
  - Bodington
- Commercial software suppliers
  - uPortal (iAssessment, Unicon, SCT)
  - Dual products (L-Soft, SendMail)
- Support firms
  - Red Hat, Novell

Support options

	Availability	Scalability	Continuity	Pricing
Developers	Limited	Limited	Seldom	Free
Special purpose organization	General	Possible	As needed	Cost-based
Commercial supplier	General	Goal (volume)	Expected	Uncertain
Support firms	General	Goal (volume)	Expected	Uncertain

Value of community

- Shared knowledge, experience reduces local development costs
- Open standards reduces the development and maintenance costs for integration, now 70 to 80% of IT budgets
- Aligns business and personal goals

Limit of community

- Development/support is not first priority (though developers tend to be very responsive)

- May be less effective when extended to business applications (because of domain expertise)

- Takes effort to facilitate communication. Collaboration may delay resolution of issues.

Value of open source

- Effects features, pricing of commercial software
- Builds local technical capabilities; reduces dependence
- More closely aligns software functionality with business needs
- May change the culture of an organization

"We do open source"

Sebastian Rahtz at Commons Solutions Group,
24 September 2003

uPortal roadmap

Date	Major Release
July 2000	First release, v 1.0
February 2001	Roles, v 1.5
June 2001	Performance, v1.6
February 2002	XSLT Architecture, v2.0
December 2002	Minor enhancements, v2.1
January 2004	Internationalization, aggregated layouts, integrated mode

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uPortal direction

- JSR168, WSRP compliance (Open standards)
- Focus on higher education features
  - Full Internationalization
  - "Decentralized control" of "pushed content"
- Cooperation with business partners (support model)
- Collaboration with portlet developers, especially SAKAI project (uPortal value to university)

SAKAI Project

- Builds on existing relationships, shared vision for application development, rapid timeline for delivery

- Deliverables
  - Tool Portability Profile
    - OKI-based, JSR-168 Portlet, CHEF Framework
  - CMS, Services-based Portal w/JSR-168, Assessment, ….etc., -- *pre-integrated, modular*
  - Common implementation timeframe
  - "Open/open" source licensing

- Michigan, Indiana, MIT, Stanford, uPortal

Jeff Merriman, MIT, at Educause 2003

SAKAI Partners Program

- Officially to be Announced in December '03
- Benefits
  - Invitation to SAKAI Partners meetings (Spring 04, Fall 04, etc.)
  - Technical training workshops
  - Access to technical staff for tool development with Tool Portability Profile
  - Access to early code
- Partners contribute to success of open source options for higher ed
  - Creates an ecosystem of core modules and tools to develop sustainable economics and innovation

Jeff Merriman, MIT, at Educause 2003

The end

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