SS Watch

Open Source Deployment and Development

OSS Watch Inaugural Conference

11 December 2003

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Why are we here today?

- *to raise awareness of issues surrounding free and open source software*
- *to look at the relationship between open standards and open source*
- *to enter the scary jungle of licensing*
- *to welcome OSS Watch to the world*

...and to have some free beer when we are finished

Welcome to OSS Watch!

JISC has funded OSS Watch as a pilot service to give neutral guidance about free and open source software. Issues such as:

➢ *information for institutions considering putting open source into their information strategies*
➢ *the exposure of the UK academic community to any problems with open source*
➢ *what to do with the results of publicly-funded software projects*

Today is our launch party!

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What OSS Watch does

➤ *Offer a neutral and practical web site*
➤ *Run at least two open meetings a year*
➤ *Run two focus groups year, and write analyses*
➤ *Engage in understanding institutional processes*
➤ *Advise IT managers, project developers, and users*
➤ *Give advice on open source at any UK/FE forum*

... and make all its material available under the GNU Free Documentation License

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What OSS Watch does not do

➢ *Try to* persuade *people to adopt open source*
➢ *Run a software repository*
➢ *Help people with their Open Office problems*
➢ *Compete with* freshmeat *or* slashdot
➢ *Provide definitive legal advice*
➢ *Be a forum for hairy sandal-wearing geeks*

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Plans for OSS Watch

Obviously*:*

➢ *run a web site*
➢ *talk at conferences*
➢ *organize workshops*
➢ *write reports*
➢ *keep our fingers on the pulse*

But to find out *what* to talk about, we have spent some months on a scoping study.

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Outline of Presentation

- Report Purpose

- Report Method

- UK Government and EU Policy
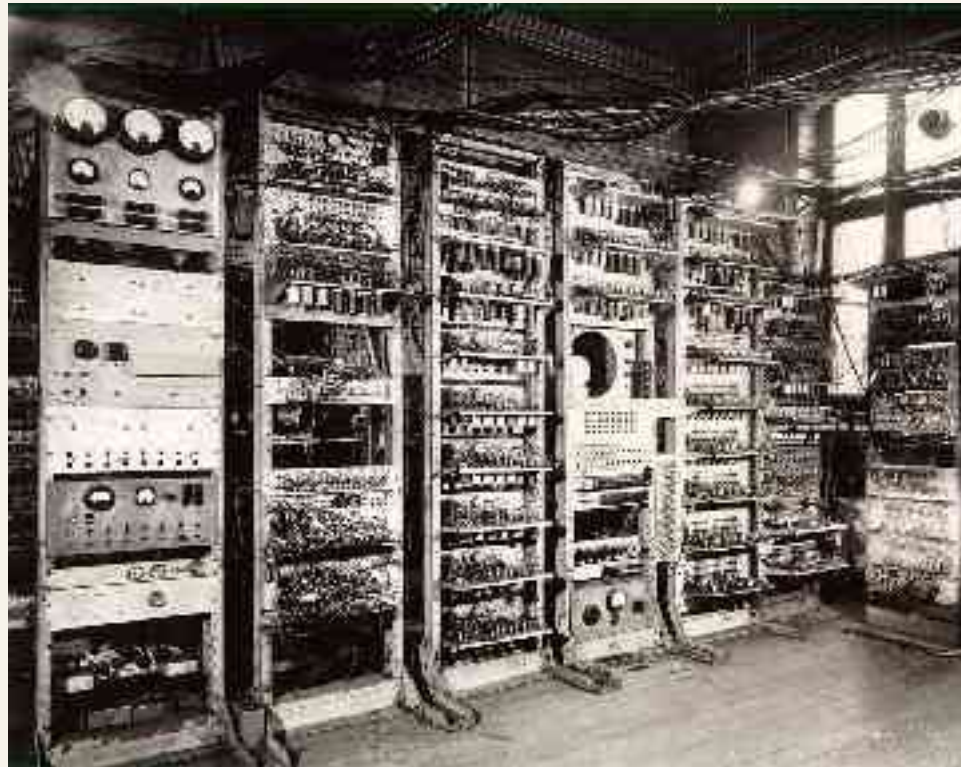
- Survey and Site Visit Findings

- Recommendations

OSS Watch Report Purpose and Method

- *Purpose*: To provide evidence for understanding and addressing the needs of higher education and further education (HE/FE) stakeholders in their use of Open Source Software.

- *Method*:

  - Overview of general OSS use in UK

  - Overview of UK Government and EU Policy

  - Scoping Survey – focus on IT Strategy & Software Development

  - Mini-survey – informal, focus on advisory service "wish list"

  - Site visits - to fill out gaps in the surveys, and gain more detailed understanding of how strategies are formed

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OSS Use in UK

- History of free software in the UK: from 'Baby' to DECUS UK to Alan Cox

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OSS Use in UK

- History of free software in the UK: from 'Baby' to DECUS UK to Alan Cox
- Measuring the growth of OSS

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Measuring OSS Use

Fig. 1: Top Web Servers in UK Domain, Nov. '96 - Nov. '03
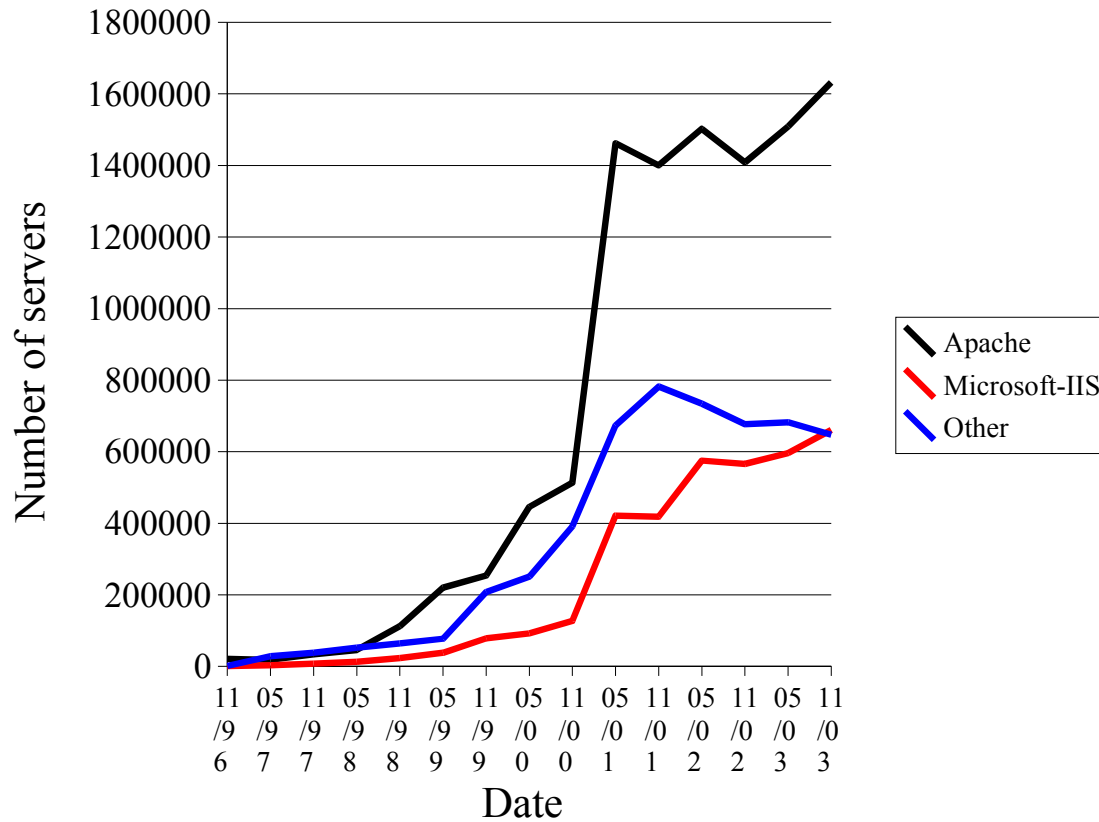
Compiled from Netcraft Web Survey. N.B., does not measure intranet and LAN servers

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OSS Use in UK

- History of free software in the UK: from "Baby" to DECUS UK to Alan Cox
- Measuring the growth of OSS
- Compared to our EU neighbours

	UK		Sweden		German	
	small	**large**	**small**	**large**	**small**	**large**
High intensity firm	25.0%	74.1%	20.4%	13.2%	27.0%	51.3%
Medium intensity firm	39.1%	9.1%	14.6%	32.8%	45.5%	51.3%
Low intensity firm	25.0%	14.3%	13.6%	20.3%	52.8%	44.4%

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OSS Use in UK

- History of free software in the UK: from "Baby" to DECUS UK to Alan Cox

- Measuring the growth of OSS

- Compared to our EU neighbours

- In the end, we just don't know very much...

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UK Government & EU Policy

- 2001 report to the UK government
  - "OSS is indeed the start of a fundamental change in the software infrastructure marketplace, and is not a hype bubble that will burst."

- Office of the e-Envoy July 2002 policy decisions
  - OSS as default exploitation route for R&D software?
  - Nine "proof of concept" Linux trials

- European Commission *eEurope* Initiative

OSS Watch Survey Overview

- What we know already: Australian and FLOSS survey

- OSS Watch Survey is largest of its kind:

	No. of institutions	Institutions responding	Individual Respondents
HE	168	29 (17%)	34
FE	514	34 (7%)	34
Total	**682**	**63 (9%)**	**68**

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Results – IT Strategy: HE vs. FE

- FE institutions lag behind HE institutions in their number of staff with the skills to deploy OSS.

  - 88% of FE respondents reported that very few staff members had these skills

  - 59% of HE respondents reported that their staff had moderate or significant skills with OSS

Results – IT Strategy: HE vs. FE

- FE institutions lag behind HE institutions in their number of staff with the skills to deploy OSS.

- HE institutions are much further advanced in the process of examining the potential of OSS solutions for their institutions.

  - 73% of HE respondents reported that their organisation has either looked seriously into OSS and/or has already made some decisions on its deployment

  - 61% of FE institutions said that very few members of their organisation were more than slightly aware of open source concepts

Results – IT Strategy: HE vs. FE

- FE institutions lag behind HE institutions in their number of staff with the skills to deploy OSS.

- HE institutions are much further advanced in the process of examining the potential of OSS solutions for their institutions.

- Current and planned deployment is most significant for networking systems and operating systems.

Results – Reasons for Choosing OSS

- Reasons for choosing OSS solutions in both HE and FE are principally financial

  - 25% of HE respondents and 53% of FE respondents identified cost as the most important reason for choosing OSS over proprietary analogues.

Results – Reasons for Choosing OSS

- Reasons for choosing OSS solutions in both HE and FE are principally financial.

- Interoperability due to open standards is also a major attraction for HE institutions.

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Biggest Concerns for OSS

1. Interoperability and migration concerns (56%)

2. Third party support (37%)

3. Identification, categorisation, and availability of relevant software (29%)

4. Legal issues, including licensing (22%)

5. How to archive and manage ongoing development of software after projects are finished in-house (22%)

Results – Licensing Strategy

- The majority of institutions which develop software in-house (59%) have never considered the issue of licensing, and do not have an institutional licensing policy.

- Site visits revealed confusion over how to commercialise code protected under the GPL.

Recommendations – Govt. Policy

- More data needs to be compiled and collected on OSS use in UK HE and FE, and on Total Cost of Operation.

- UK Government and EU policy developments should be tracked and summarised, including information on meeting dates and links to primary documents.

- Given the apparent lack of coordination in interfacing with government, a focal point is needed for the communication of academic stakeholders' concerns to policymakers.

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Recommendations – IT Strategy

- Training workshops targeted at FE institutions that would like to consider the deployment of OSS software, but have few staff skilled in the use of OSS, should be carried out.

- Stakeholders could helpfully be offered case studies of institutional strategies which explicitly consider OSS and strategy templates based on these experiences.

- Information should be provided on lesser-known or more specialised OSS packages relevant to stakeholder needs.

Recommendations – Development

- Institutions should be provide with information and guidance on the possible licensing routes, with particular attention given to the implications of OSS licensing for commercial exploitation.

- Cases of universities successfully commercializing source code protected under OSS licenses should be investigated and made available to developers and university enterprise offices.

What next for OSS Watch?

- *How do I get support for OSS, and train staff?*

- *What is out there of any use to us?*

- *What about interoperability, and migration from existing software?*

- *How do we license our work?*

- *What is government and EEC policy on OSS?*

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Conference: Support and training

A one day conference to be held in early June in London, to look at institutional commitment to open source software in the back office

- *What are the support models for OSS?*

- *How do commercial vendors work with OSS?*

- *How can institutions combine together to support each other?*

- *What is the impact on staff training needs?*

Study: licensing and IPR

A workshop to be held in March, with the aim of writing a road map for developers:

- *finding out who owns the copyright*

- *OSS as a method of exploitation*

- *how to choose a license*

- *implications for working with commercial partners*

Hopefully informed by the work of the new Open Middleware Infrastructure Institute

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Study: interoperability&migration

A workshop to be held in September, with the aim of writing a *road map for deployment:*

- *Which types of software can work in a mixed economy?*

- *What is the impact on legacy data?*

- *What is the cost of migration?*

- *Do "open standards" mean anything?*

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Study: real users

Look at some students actually using open source software over a period of months

Open Source Deployment and Development

- Making the institutional case – Martin Wood Lecture Theatre

- Practical approaches and support – Martin Wood Lecture Theatre

- How do you make an open source project? – Lindeman Lecture Theatre (first floor)

- Getting the right licence – Lindeman Lecture Theatre (first floor)