

Risk Management in Open Source Procurement

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Engaging with Open Source

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Engaging with Open Source

- ▶ Who are OSS Watch?
- ▶ Why consider open source?
- ▶ Evaluating open source software and providers
- ▶ OSS Watch can help...

Who are OSS Watch?

- ▶ JISC funded open source advisory service to UK HE and FE
- ▶ Trust, impartiality, practical advice, openness and collaboration, pragmatism and balance, expertise
- ▶ Services
 - Clearing house: info@oss-watch.ac.uk
 - Content: <http://www.oss-watch.ac.uk>
 - Consultancy

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Who is Ross Gardler?

- ▶ Open source developer
 - Member of The Apache Software Foundation
- ▶ Joined OSS Watch in Jan 2007
- ▶ Service Manager in July 2007
- ▶ My focus is on open source as a sustainable development methodology

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Why Consider Open Source? Because everyone else does?

- ▶ **UK Government** will consider OSS solutions alongside proprietary ones in IT procurements. Contracts will be awarded on a value for money basis.

http://www.govtalk.gov.uk/documents/oss_policy_version2.pdf

- ▶ The **[European] Commission** will consider OSS solutions the same way as proprietary ones in IT procurements. Contracts will be awarded on a "value for money" basis. Not only licence costs ,but also setup, maintenance, support and training costs must be considered.

<http://ec.europa.eu/idabc/en/document/7389/5998>

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 **SS Watch**

Because everyone else does?

- ▶ **National Security Agency (NSA)** today announced an agreement to jointly work within the OpenSolaris community to research and to develop security enhancements to complement existing OpenSolaris security mechanisms.

<http://www.sun.com/aboutsun/pr/2008-03/sunflash.20080313.1.xml>

- ▶ And so on...

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Why Consider Open Source?

- ▶ Following the crowd is not good business sense, we need more
- ▶ Flexibility
- ▶ Interoperability
- ▶ Avoidance of lock-in
- ▶ Viable alternatives

Is Open Source Always Right?

- ▶ No, but to reject open source without proper evaluation will result in a sub-optimal solution, even when opting for closed source
- ▶ Why?
 - evaluating open source puts pressure on closed source providers to provide a better and/or cheaper product
- ▶ Competition is a good thing and open source for competition.

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Open Source: More than a Licence

- ▶ It is a development methodology
- ▶ Key attributes include:
 - User engagement
 - Transparency
 - Collaboration
 - Agility
- ▶ Open source provides options for your organisation

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Open Source: Options

- ▶ Build your own
- ▶ Collaborative build
- ▶ Off the shelf solutions
 - Internal support
 - Outsourced support
- ▶ Bespoke solutions
 - Internal support
 - Outsourced support

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Caveat:

Not all open source is equal

- ▶ Sometimes open source is little more than a marketing tool
 - Crippled open source version, paid for feature rich version
 - Closed development methodology
- ▶ If open source is a marketing tool you will not get the full benefits of the open source development methodology

Evaluating open source software and providers

- ▶ Closed source evaluation looks as the provider and the software as a single entity
 - You can't see the development methodology
- ▶ Open source evaluation separates these factors
 - Software functionality
 - User engagement and the development model
 - Paid for support providers

Evaluation frameworks

- ▶ **Open Source Maturity Model (OSMM)** from Capgemini
- ▶ **Open Source Maturity Model (OSMM®)** from Navica
- ▶ **Methodology of Qualification and Selection of Open Source software (QSOS)**
- ▶ **Open Business Readiness Rating (OpenBRR)**

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What to evaluate

	OSMM (Capgemini)	OSMM (Navica)	QSOS	OBRR
Software (non-technical)	X	X	X	X
Software (technical)			X	X
Integration		X	X	X
User support	X	X	X	X
Adoption	X		X	X
Development Process	X		X	X
Documentation		X	X	X
Professional Services		X	X	X
Training		X	X	X

Evaluation Process

- ▶ All frameworks follow roughly the same approach
 1. Assess against criteria
 2. **Apply weightings**
 3. Calculate overall product score
- ▶ The process of evaluation encourages one to evaluate the parts of a project unreachable in closed source
- ▶ Thinking about weightings helps develop a clear idea of whether we care about the development methodology

Changing policies...

- ▶ Engaging with open source requires a new approach
- ▶ You need a policy
 - Always evaluate open source options
 - Define how you will engage with open source solutions
 - Outsourced or in-house support
 - Define how you will manage and fund support
 - Ensuring support providers are active community
 - Staff training and contributing back

OSS Watch can help evaluate open source risks

- ▶ OSS Watch are an impartial, non-advocacy advisory service
- ▶ We won't tell you what to do, but we will help you understand the options
- ▶ We'll help you write a policy for engaging with open source in a balanced and managed way

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