

Open source is for real, and it's for you

Sebastian Rahtz

Summary

Watch?

software

involvemen

Licences

Developing using oper source

Open source is for real, and it's for you

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OSS Watch

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Outline

Open source is for real, and it's for you

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Summary

Open sour

software

involvemen

Licences

- Summary
- What is OSS Watch?
- Open source software
- 4 Levels of involvement
- 5 Licences
- 6 Developing using open source



Summary

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Summary

Open source

software

involvemen

Licences

- Misunderstandings
- Licensing
- Development methodology
- Attitude



What is OSS Watch?

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What is OSS

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Open source

software

involvement

Licences

Developing using oper source

OSS Watch is the open source software advisory service for UK HE and FE

- OSS Watch is not an advocacy group
- Our role is to promote awareness and understanding
- OSS Watch has a range of outreach activities



OSS Watch: the open source software advisory service for UK HE and FE

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What is OSS

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- The Joint Information Systems Committee (JISC) provides ICT services to UK higher and further education institutions.
- It is funded by the UK higher and further education funding councils.
- In 2003, JISC set up OSS Watch to provide unbiased advice and guidance on free and open source software for UK higher and further education.
- Our audience is
 - strategic IT decision-makers
 - IT managers and technical staff
 - software developers
 - academic end-users
- OSS Watch is based within the Research Technologies Service at the University of Oxford.





OSS Watch activities

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What is OSS Watch?

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Licence

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• We provide a website and a wiki:

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http://www.oss-watch.ac.uk/
http://wiki.oss-watch.ac.uk/
```

- we provide briefing notes and guidance materials
- we run conferences and workshops
- we provide consultation by e-mail to info@oss-watch.ac.uk
- we do research
 - 2003: national survey on OSS use in HE and FE
 - 2006: national survey on OSS use in HE and FE
 - 2006: JISC study on models for sustainability in OS
- we provide newsfeeds:

```
http://www.oss-watch.ac.uk/rss/
```



Advocacy and Advice

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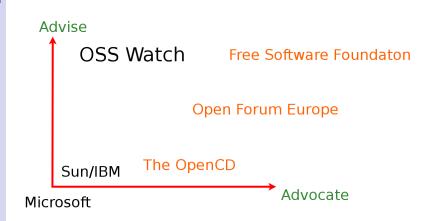
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Open source software

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Summary

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Open source software

involvement

Licences

- Software quiz
- What is open source software?
- Clearing up misunderstandings
- Reasons people consider open source software
- Open source is mainstream
- Why do people work on open source?
- Open source is about community



Software quiz

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Levels of involvement

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Do you use

- Photoshop for removing red-eye
- Microsoft Office for word-processing
- Firefox web browser
- Acrobat Reader for PDF files
- Java for running programs
- Apache web server
- Skype internet telephony
- PHP for scripting
- oXygen XML editor

in your daily life? are they open source?



Quiz answers

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	No cost	Commercial use	Give to friend	See
Photoshop	no	yes	no	no
Office	?	yes	no	no
Firefox	yes	yes	yes	yes
Acrobat	yes	yes	no	no
Java	yes	yes	yes	no
Apache	yes	yes	yes	yes
Skype	yes	yes	yes	no
PHP	yes	yes	yes	yes
oXygen	?	?	no	yes



What is open source software?

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Open source software is software for which:

- the source code is available to the end-user;
- the source code can be modified by the end-user;
- the licensing conditions are intended to facilitate continued re-use and wide availability of the software, in both commercial and non-commercial contexts;
- the cost of acquisition to the end-user is often minimal.



Clearing up misunderstandings

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- Another term that is often used is free software.
- 'The term free software is sometimes misunderstood: it has nothing to do with price. It is about freedom.' (Richard Stallman)
- The use of free is unhelpful as in English it has two meanings. French has libre and gratuit.
- 'To understand the concept, you should think of free speech, not free beer.' (Richard Stallman)
- 'Free software is often used in a political context, whereas open software is a more commerically oriented term. ... Open software is commonly used to describe the business case for free software, focusing more on the development process rather than any underlying moral requirements.' (Kim Johnson)



Clearing up misunderstandings (2)

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- Open source software may or may not cost money.
- Although open source software may be free, you should consider the total cost of ownership.
- As with proprietary software, this often bears little relation to the cost of acquiring the software.



Clearing up misunderstandings (3)

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- You don't necessarily have to run Linux: ...
- ... you can use open source software on Microsoft Windows.
- For example, TheOpenCD contains a collection of open source software that run on Microsoft Windows.
- TheOpenCD has software for tasks such as word processing, spreadsheets, presentations, e-mail, web browsing and image manipulation.
- http://theopencd.org/
- We should not choose software solely on the basis of open source. Interoperability and open standards for data are equally important.



Evaluating open source solutions

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Developing using open source Some tools are readily available:

Business Readiness Rating http://www.openbrr.org/

Open Source Maturity model

http://www.navicasoft.com/pages/osmm.htm

Top Tips for Selecting Open Source Software

http://www.oss-watch.ac.uk/resources/tips.xml

Strathclyde study: investing in software and services

http://www.insight.strath.ac.uk/projects/sw_service



Why do people work on open source?

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 The desire to learn technical skills by joining an open source project is strong.

Typical reasons for staying in open source are:

• improving skills: 32%

• ideology: 31%

improving software: 24%

seeking recognition: 12%



How do people interact in open source

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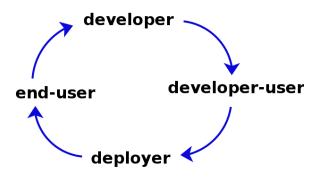
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Levels of

involvemen

Licences

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Those who *merely* deploy open source software are also part of the open source community.



Why do companies work in open source?

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- implementation of open standards might as well be done in a shared way to save costs (Example: use XML for data interchange, use ICS for calendar data)
- making 'needed improvements' only to open source is economically efficient. Work on the things you care about (Example: embedded Linux on network router)
- the revenue margin on licences is 85%, on support 54%; eg IBM and Novell are now depending more on services than licensing (Example: a £100,000 IBM solution depending on Linux, Apache — and Java)

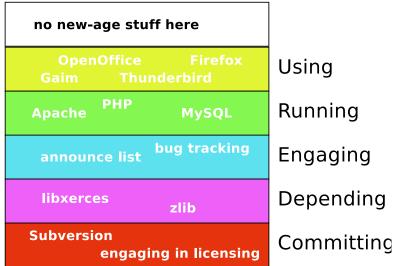


Levels of involvement

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Levels of involvement



Using Running Engaging Depending



Level -1: OSS not wanted here

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Open source

Levels of

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Microsoft and Oracle all the way. We don't use the web.



Level 0: using OSS, but don't know it

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So you've never written a line of Perl, compiled a program using GCC, or used a Linksys router?



Level 1: using OSS in your daily life

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Developing using open source Web browser Firefox

Mail client Thunderbird, Evolution

Office Open Office

Desktop Linux with Gnome

Picture editing Gimp

Music Rhythmbox, XMMS, Audacity

Messaging Gaim

... oh and the wretched games ...



The desktop

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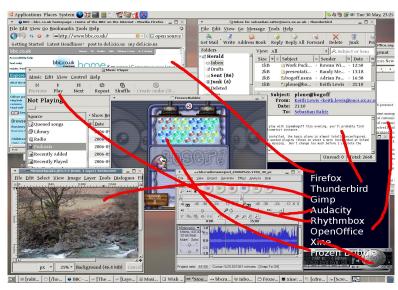
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Open sourc

Levels of

involvement

Licences





Level 2: running OSS as part of your work

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Levels of involvement

Licences

Developing using open source How do we spend our days?

Programming Perl, Python, PHP
Web server Apache httpd
Database server MySQL
Servlet container Tomcat, JBoss
Operating system Ubuntu Linux
XSL processor xsltproc

... and so on



Level 2: running OSS as part of your work (2)

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Licences

Developing using open source

Finding support:

- The documentation for the software.
- The person at the next desk.
- Your staff: you pay them to understand this stuff.
- The web: use Google to find information about your problem.
- The bookshop: any software worth using has a shelf-full of books about it.
- Training courses: lots of companies offer training.
- Consultants: pay a man in a suit (or with a ponytail) to come in and fix things.
- The people who wrote the software.



Level 3: engaging with an OSS project

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Licences

- Most projects will have a mailing list or a forum where questions are asked and answered.
- You have the source code: so you could ask questions about the code
- Requests and queries are often handled through tracking software.
- If you make changes to your local copy of the software, it is better to feed them back; otherwise, you will have a maintenance headache when the next release comes out.



Level 4: using OSS as part of your code

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Licences

- If you are developing code, you may find that some downloadable library of software is useful.
- If the licence permits, you can download it and use it with your code.
- As before, you may report bugs, request enhancements, or supply code to fix bugs
- Once again, if you make changes to your local copy of the library, it is better to feed them back; otherwise, you will have a maintenance headache when the next release comes out.



Level 5: contributing to an OSS project

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Open source software

Levels of involvement

Licences

Developing using open source A typical SourceForge project is phpMyAdmin.

• Its project page is at: http: //sourceforge.net/projects/phpmyadmin/

 Towards the bottom left of this page you will find links pointing to other pages, including those for Bugs, Feature Requests, Public Forums, Mailing Lists and CVS Repository.



Sourceforge information

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Levels of involvement





Level 5: contributing to an OSS project (2)

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Licences

Developing using open source • The Bugs page for phpMyAdmin is at: http://sourceforge.net/tracker/?atid= 377408&group_id=23067&func= browse

 SourceForge uses a request tracker system for tracking the handling of bug reports.



Sourceforge bug tracking

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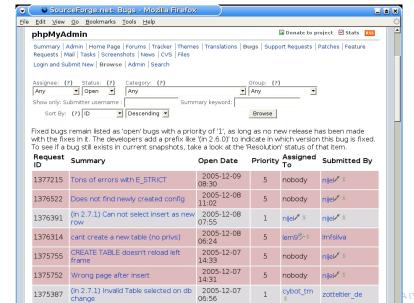
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Licences





Level 5: developing an OSS project

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Open source

Levels of

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- The final commitment is when you release your own software under an open source licence.
- You provide the ability for people to download the software, to report bugs, to request enhancements, to supply patches and to provide the means for others to alter the code.
- If you do not want to provide all the supporting infrastructure yourself, your project could be hosted at SourceForge.



Licences

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Summary

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Licences

- What is open source software? (again)
- The licensing conditions for OSS
- Oriteria of the Open Source Definition
- The Open Source Definition
- The Big Five
- Does any of this impact me as a casual user/deployer?
- Licence mingling



What is open source software? (again)

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Summar

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Licences

Developing using open source

Open source software is software for which:

- the source code is available to the end-user;
- the source code can be modified by the end-user;
- the licensing conditions are intended to facilitate continued re-use and wide availability of the software, in both commercial and non-commercial contexts;
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The licensing conditions for OSS

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- There is a body called the *Open Source Initiative*.
- http://www.opensource.org/
- This body maintains the Open Source Definition (OSD).
- This is a list of ten criteria for a licence to pass for it to be an open source licence.
- The OSI's website gives the details of 58 OSI-certified licences.
- So open source software is software released under a licence that has been certified by the Open Source Initiative.



The licensing conditions for OSS (2)

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- The OSI is not a legislative body.
- Instead, its authority resides entirely in the fact that the open source community
 - recognizes it as the maintainer of the Open Source Definition (OSD);
 - is willing to participate in the OSI certification process;
 - has not set up a viable alternative.



Criteria of the Open Source Definition

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Licences

- free redistribution
- source code
- derived works
- integrity of the author's source code
- no discrimination against persons or groups
- no discrimination against fields of endeavour
- distribution of licence
- licence must not be specific to a product
- licence must not restrict other software
- licence must be technology-neutral



The Big Five

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Levels of

involvemen

Licences

using oper source





The Big Five (2)

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Licences

Developing using open source

• The licences that are most often used are:

- The GNU General Public License
- The GNU Lesser General Public License
- The Modified BSD License
- The Apache License v2
- The Mozilla Public License
- The OSS Watch site has briefing notes on each of these licences.
- For more details, go to http: //www.oss-watch.ac.uk/resources/ipr.xml
- If you are wanting to work out which licence to use, look at these briefing notes.



Does any of this impact me as a casual user/deployer?

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If you stay as a pure user, no (i.e., there are no aspects of the licence that need concern you).

But if you plan to:

- redistribute software;
- integrate the software with your own systems;
- fix problems with the software;

you are bound by the licence you got with the software.



Licence mingling

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- What happens if you produce open source software that uses more than one piece of open source software?
- It would be nice if all open source software could be combined without restriction to produce new open source software.
- Unfortunately this is not the case.
- It depends on the licences being used.
- Two licences which each meet the requirements of the Open Source Definition . . .
- ... may nevertheless contain terms which make them incompatible with each other.



Developing using open source

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What is OS Watch?

Open source software

Levels of

Licences

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So is open source for real, and for you?



What challenges do open source projects face?

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Licences

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Projects *tend* to start small, and often go in one of seven directions:

- stay small: remains a nerd tool
- gather users but no new developers: frustrated users
- fragment when primary leader loses interest: unattractive for new people
- develop power but with minimal documentation:
 no way to find the power
- grow within an expert community: high price for admission
- go commercial: stops being 'free'
- simply die

The usual panacea is 'you need to build a community'





What we aspire to

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Open source

Levels of involvement

Licences





More pragmatically

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Developing using open source

The Apache Software Foundation

http://www.apache.org/

Apache Projects

- HTTP Server • Ant
- APR · Beehive
- Cocoon • DB
- Directory Excalibur · Forrest
- Geronimo Gump iBATIS
- Incubator
- lakarta lames
- Lenya
- Logging Lucene
- Maven MvFaces
- Perl
- Portals SpamAssassin
- Struts • TCI
- Tomcat Web Services XMI
- XMLBeans
- XML Graphics Apache-wide Conferences

Farewell to Nicolas Chalumeau

Welcome!

The Apache Software Foundation provides support for the Apache community of open-source software projects. The Apache projects are characterized by a collaborative, consensus based development process, an open and pragmatic software license, and a desire to create high quality software that leads the way in its field. We consider ourselves not simply a group of projects sharing a server, but rather a community of developers and users.

Support the Apache Software Foundation

You are invited to participate in The Apache Software Foundation. Our membership consists of those individuals who have demonstrated a commitment to collaborative open-source software development through sustained participation and contributions within the Foundation's projects. Of course, you can contribute to the foundation in

many ways: Buy Apache Gear Donate your old car Donate via PayPal Support FAQ

Latest News

If you would like to keep up with news and announcements from the foundation and all its projects, you can subscribe to the new Apache Announcements List.

Make plans for ApacheCon US 2005 in San Diego

Remember that ApacheCon US 2005 will be held in San Diego, California on December 10-14, 2005, ApacheCon US will offer a wide spectrum of top-quality sessions, as well as two days with full- and half-day tutorials. Please make plans to join us in San Diego.

of Open Source DECEMBER 10-14 SAN DIEGO, CA

Leading the Wave

The Apache Software Foundation is seeking proposals to help us document, automate, and maintain our systems for a three-month term. Proposals for longer-term maintenance may be solicitied later. This is a paid position with a deadline for submissions of December 2.

Request for Proposals for System Administrators

Foundation

- FAO Licenses Public Records
- Donations
- Thanks Contact
- News

 - Conferences Other Events

How it works

- Introduction
- Meritocracy Structure
- Roles Collaboration
- Infrastructure Incubator
- · Other entities Glossary
- Voting Get Involved

 Mailing Lists Version Control Developer Info

Download

· from a mirror



Types of open source communities

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- Developers who want to work on a shared project
- Users of software who want to get better results from it
- A community with a problem which is solved by software
- Programmers who find it gets software developed faster
- A procedural infrastructure to provide long-term stability



Communities of practice

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- informal networks that emerge from a desire to work more effectively or to understand work more deeply among members of a particular speciality or work group.
- small groups of people who've worked together over a period of time and through extensive communication have developed a common sense of purpose and a desire to share work-related knowledge and experience.
- communities of apprentices where newcomers learn by gradually going from peripheral participation to full participation in the community.



Caveats on the nature of communities

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- there are communities of users and communities of developers
- what differentiates open source communities from user groups?
- how are they different from advocacy groups?
- what about open content groups like Wikipedia
- is community the only way of developing good software?
- you can't control the community because of the OSI licence
- can you have several communities for the same bit of software?



Community tensions

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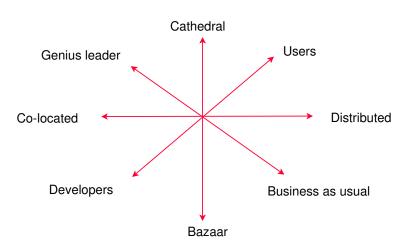
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Open source

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Licences





Shining examples of community

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Licences

Developing using open source

Apache web server (etc) a technical strategy; formal democratic management; enviable reputation for quality

Firefox web browser Committed non-technical evangelists and plugin writers

uPortal portal framework shared development between academia and business

Debian Linux Articulated policies and procedures; no prima donna leaders

Moodle VLE a community of teachers which merges seamlessly into developers; charismatic leadership; self-hosting



Debian characteristics

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Licences

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A free Linux distribution:

- multi-architecture (11 architectures)
- very large (1000 developers, 10000 packages)
- volunteers (although some do it as part of their real job)
- distributed (Europe, America, some Australia, not much in Asia or China). European developers seem to tend towards being loner volunteers, in US people are from companies



Debian infrastructure

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Levels of involvement

Licences

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documents

- Debian Social Contract; Debian wants to move to a social contract which says "free" not "free software"
- policy documents
- developers reference

forums

- IRC for direct access, good for answers
- mailing lists (100+, covering user, developer, announce), good for discussion
- bug tracking system, for archiving
- developer web portal
- package tracking system
- face-to-face meetings, eg at conferences



Debian constitution and officers

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- developers
- technical committee (meritocracy, appointed but not removeable; resolves technical disputes)
- project secretary (handles votes)
- project leader (yearly election by developers; talks at meetings, represents Debian, talks to companies, motivates people, coordinates work)
- delegates (appointed by leader to do a job)
- release manager
- teams: release, ftp masters, web, new maintainer, ports, security, publicity
- users reach consensus on decisions, on mail lists
- Software in the Public Interest (SPI). US non-profit which owns trademark, holds money, does legal matters



How does Moodle work?

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Moodle is a benevolent dictatorship. Some characteristics:

- Over 4000 registered Moodle sites
- Moodle is entirely self-hosting
- There are support forums in many languages
- http://moodle.com offers commerical support through Moodle Partners
- Partners pay royalties to The Moodle Trust to further Moodle development



General community developer rôles

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Levels of involvement

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The visionary has the Big Idea & mp; makes the long-term decisions

The leader makes the medium-term decisions

The programmer implements the functionality and makes the short-term decisions

The tester finds the bugs

The apprentice programmer fixes the bugs

The documentor writes the manual

The communicator tells other people how good it all is

The distributor packages it up for new users to try

How many of these rôles can safely be filled by one person?



Characterizing development communities

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Many open source software development groups have common characteristics:

- small groups of people who have worked together over a period of time and have developed a common sense of purpose
- communities of apprentices where newcomers learn by gradually going from peripheral participation to full participation
- collective understanding of the community by its members and accountability to each other
- shared repertoire of languages, tools, artefacts, etc, produced by the community.



Requirements for a formal community

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Licences

- named rôles
- written rules (remember the OSI licence)
- communication channels
- discouragement of dissent
- leadership
- legalities, copyright etc



Top tip: start with your web presence

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involvement

Licences

Developing using open source

Tell people in a simple, summary, way what you are up to:

- This is what the software is supposed to do
- This is who it is aimed at
- There are its main features
- These are the main software or other dependencies
- Here are some screen shots
- This is the developer community
- Here are licence, download and install instructions

to have a nice mixed community



Some people don't want to encourage you

Open source is for real, and it's for you

Sebastian Rahtz

Summary

What is OS

Open source

software

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Licences

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The Linux Kernel Archives

Welcome to the Linux Kernel Archives. This is the primary site for the Linux kernel source, but it has much more than just Linux kernels.

Protocol	Location
HTTP	http://www.kernel.org/pub/
FTP	ftp://ftp.kernel.org/pub/
RSYNC	rsync://rsync.kernel.org/pub

The latest stable version of the Linux kernel is:	2.6.14.3	2005-11-24 22:15 UTC E	Y YI C	Changelog
The latest prepatch for the stable Linux kernel tree is:	2.6.15-rc5	2005-12-04 06:02 UTC	Y YI C	Changelog
The latest snapshot for the stable Linux kernel tree is:	2.6.15-rc5-git1	2005-12-05 08:01 UTC	<u>v</u> <u>c</u>	
The latest 2.4 version of the Linux kernel is:	2.4.32	2005-11-16 19:13 UTC <u>F</u>	<u>v vi c</u>	Changelog
The latest 2.2 version of the Linux kernel is:	2.2.26	2004-02-25 00:28 UTC E	V	Changelog
The latest prepatch for the 2.2 Linux kernel tree is:	2.2.27-rc2	2005-01-12 23:55 UTC	V VI	Changelog
The latest 2.0 version of the Linux kernel is:	2.0.40	2004-02-08 07:13 UTC E	V VI	Changelog
The latest <u>-ac patch</u> to the stable Linux kernels is:	2.6.11-ac7	2005-04-11 18:36 UTC	V	
The latest -mm patch to the stable Linux kernels is:	2.6.15-rc5-mm1	2005-12-05 06:51 UTC	V	Changelog

F = full source, V = view patch, VI = view incremental, C = current <u>changesets</u>

Changelogs are provided by the kernel authors directly. Please don't write the webmaster about them

Customize the satch viewer





Some people really want to establish a technological lead

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Summar

What is OS

Open source

Levels of involvement

Licences





Some people are so big they don't need to describe what they do

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Open source

software

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Community-building methods

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Summary

Watch?

software

involvement

Licences

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reward contributors by acknowledgement

- communicate your vision (Gnu ePrints implements OAI)
- make your etiquette plan
- be open and democratic (don't make all decisions at physical meetings at the pub)
- have a good flexible infrastructure
- have an IP policy and a clear licence



Acknowledging contributors

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Summary

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