Open source software in Further Education in the UK

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We are...

- National innovation centre supporting open source in Further Education (FE) and Higher Education (HE)

- Free of charge for FE and HE

- JISC-funded since 2003 (4th period of funding)

- Who: Ross Gardler, 5 staff, 4 contractors

- Where: Oxford University Computing Services

What we do

- Advice on all things open
  - Procurement, engagement, development, legal
- Services
  - Consultancy, events, presentations, community
- Publications
  - Briefing notes, surveys, case studies, slides
    http://www.oss-watch.ac.uk/resources/

What we don't do

- Advocacy

- Lawyer-like legal advice

- Teaching programming

- Develop software for others

- Recommend specific software

Open source software

It starts with a licence

- Software released under an OSI approved licence

- In practice, approx. same as free software (FSF)

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Open source definition
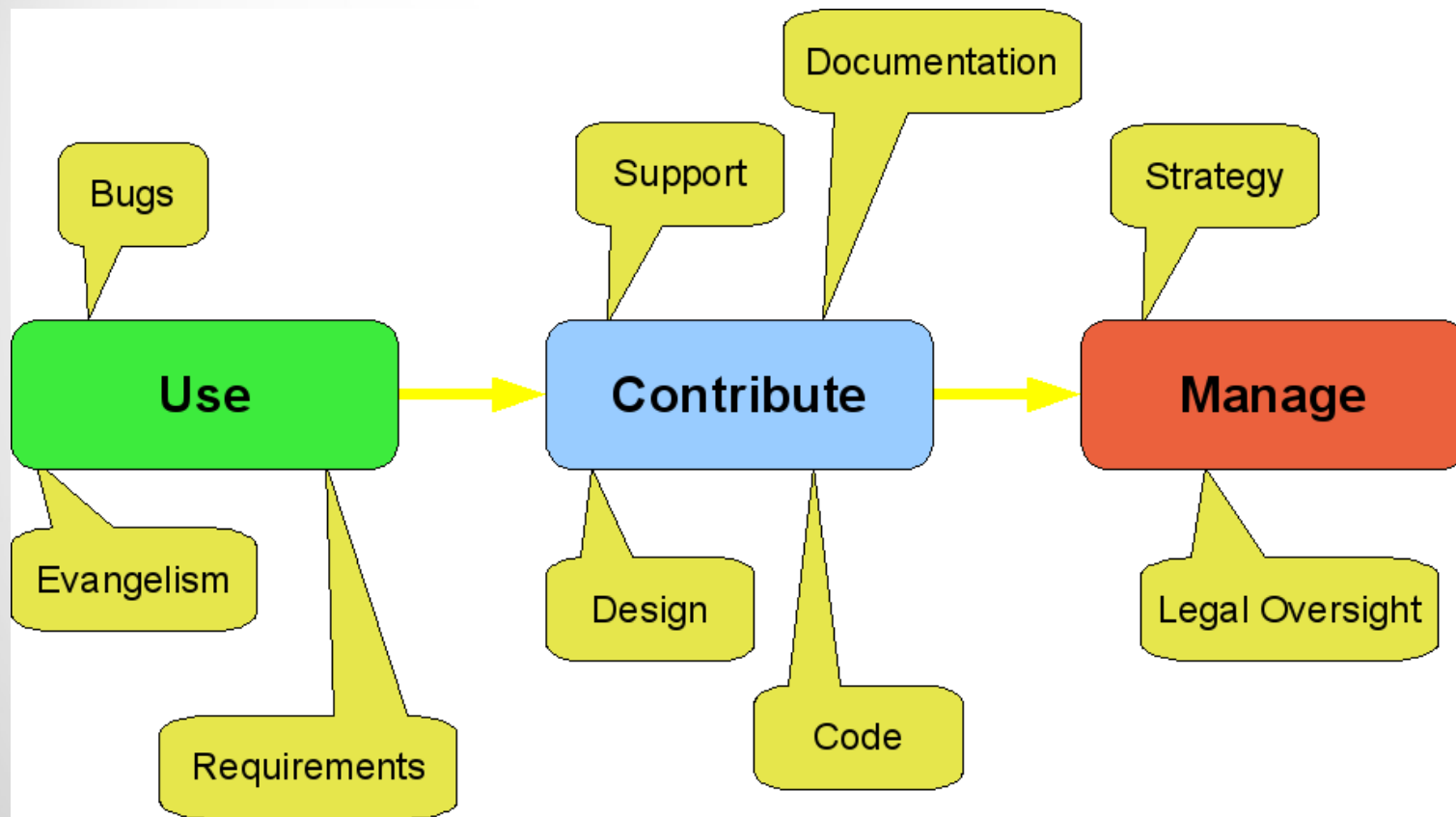
- Free redistribution

- Source code

- Derived works

- Integrity of the author's work

- No discrimination against persons or groups

- etc. http://www.opensource.org/docs/definition.php

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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

- Sustainable communities

- Open formats and standards

- Open development

A project community

Some myths (1)

- Myth
  - Anarchic projects managed by volunteers

- 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

  - Crippled open source version, all features in closed source version

  - Closed development methodology

Why should you care?

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 needs?

- Flexibility

- Interoperability

    – Do you consider this to be "single-vendor"?

- Avoidance of lock-in

- Viable alternatives

- More potential for students to learn software

State of OSS in UK FE

National survey 2008

- ICT Directors from
  - 454 FE/FE+HE institutions
  - 161 HE institutions
- 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 vs. practice

- Policy
  - In 2006, 30% institutions mentioned open source
  - In 2008, 57%
  - Staff contributions regulated only in 14%

- Practice
  - In 2006, 77% considered open source
  - In 2008, 87% (but only 15% equally to closed source!)

Software deployment on servers

- All or almost all closed source

  – From 56% (past) to 40% (present)

- Mostly closed source

  – From 20% (past) to 44% (present)

- Half open and half closed source

  – From 3% (present) to 11% (future)

- Similar trend on desktops

Criteria for procurement in FE

- Top criteria
  - Performance, interoperability with other products, familiarity, TCO (servers)
  - Performance, avoid lock-ins, TCO (desktops)

- Bottom criteria
  - Ideological reasons, migration costs (servers)
  - Migration costs, legal issues (desktops)

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Reasons to reject OSS given by FE

- Top reasons
    - Lack of staff expertise and support, poor quality (servers)
    - Not what users want, lack of staff expertise, no solution for our needs, lack of support, (desktops)

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Conclusions and references

Conclusions

- OSS Watch is here to help you info@oss-watch.ac.uk

- Open source starts with a licence, but works thanks to the community and development practices

- Volunteers, small and big businesses... but are they reaching FE?

- Trend pro-open source:

  – Quite clear: authority guidelines and market

  – Milder: FE

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