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The OSSG Quarterly Newsletter

The newsletter of the Open Source Specialist Group of the British Computer Society

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From the editor

Welcome to the third edition of the OSSG quarterly newsletter. Our aim is to make the OSSG newsletter insightful and informative around Open Source and Open Standards software and related topics. We hope you find it of interest and welcome contributions from all.

Sarah Davey – Editor

BCS Open Source SG (OSSG) – Chair's Report 2011

Contributed by Mark Elkins, Chair, OSSG

OSSG was formed in 2005 and since that time has become very well established in the wider Free and Open Source (FOSS) community.

Within the BCS year September 2010 to September 2011 OSSG has potentially become one of the most important BCS Specialist Groups by becoming directly involved with Her Majesty's Government (HMG) over future HMG ICT strategy and the current UK Government's stated desire to make much greater use of Open Source Software. Two lively events in February 2011

<http://ossq.bcs.org/2011/02/02/adoptio-n-of-open-source-across-hm-government-london-220211/> and March 2011

<http://ossq.bcs.org/2011/02/02/adoptio-n-of-open-source-across-hm-government-london-010311/> widely reported in the Computing Press started this process off where HMG, HMG System Integrators, and OSSG openly discussed the adoption of Open Source across HMG. Many aspects of these two events, and subsequent OSSG involvement with HMG, I am told by HMG, then found their way into the March 2011 ICT statement by the Cabinet Office Minister Francis Maude

http://www.cabinetoffice.gov.uk/sites/default/files/resources/uk-government-government-ict-strategy_0.pdf

Following on from the February and March 2011 HMG events several other events have been held on topic of HMG and Open Source all attended by HMG

representatives. Another related event <http://ossq.bcs.org/2011/04/14/open-source-and-the-uk-liam-maxwell-london-120511/> attended by the Computing press was when Liam Maxwell now seconded by HMG to work on Open Source gave a talk around where the UK might be heading on this topic.

In addition to holding OSSG events on the topic of HMG adoption of Open Source, OSSG planned within the BCS year (2010 to 2011) six internal Civil Service events on a number of Open Source themes and topics to be held in the first half of 2012. Brief information on this can be seen in the 2nd edition of the OSSG Newsletter at <http://ossq.bcs.org/wp-content/uploads/Issue-2-Oct-11.pdf>

Another milestone for OSSG was reached within the BCS year (2010 to 2011) when agreement was reached with BCS HQ and LinuxIT <http://www.linuxit.com/> to sponsor the publishing and editing of the OSSG Newsletter. The first edition <http://ossq.bcs.org/wp-content/uploads/Issue-1-July-11-1.pdf> being launched in July 2011.

Apart from events involving HMG, OSSG has held events on a number of other topics. The first of these in the BCS year (2010 to 2011) being a one day Open Source Health Informatics (UK) Conference

in London on the 27th October 2010
<http://ossg.bcs.org/2010/07/30/open-source-health-informatics-conference-london-271010/> A perusal of the OSSG website at <http://ossg.bcs.org/> will show a number of other events held in the BCS year (2010 to 2011) including a number of joint ones held with other BCS Branches and Specialist Groups. All in all OSSG was averaging more than one event per calendar month on a budget of around £1300, which I would suggest is exceptional value for money for the BCS and the publicity and creditability it has received from this expenditure.

Into the new BCS year (2012 to 2013) OSSG looks likely to continue its upward descent.

Following on from a series of external events organised by the BCS Open Source SG (OSSG) around the topic of Open Source and Her Majesty's Government (HMG), OSSG will be taking the lead in putting together a number of internal HMG events.

The events are currently planned to start early in the New Year and intend to attract an audience of up to 100 HMG staff primarily involved in IT procurement and delivery. A key aim is to give HMG staff and a range of organisations and individuals active in Open Source the opportunity to better understand the scope for Open Source across HMG.

Open or Shut? Open Source in the public sector

Contributed by Graham Oakes, member of the BCS Open Source Specialist Group

Has Open Source software's day finally arrived?

The Conservatives came into government with a manifesto commitment to "create a level playing field for Open Source". Before that, Labour published its 2009 Action Plan on "Open Source, Open Standards and Re-Use". With an imperative to cut costs and cross-party support, Open Source must be flooding across Whitehall, mustn't it?

So where do we stand? Here are some of the realities behind Open Source.

Open Software isn't necessarily Cheap Software

Say "Open Source" and the first thing many people think is "no licence fees". The attractions are obvious: licence fees are a highly visible element of many software projects. Eliminate them and you make some significant cost savings.

Sadly, it's not that simple. Licence fees are the tip of the software iceberg. Installation and configuration can add significantly to overall costs. Training adds yet more. And the organisational change management necessary to actually deliver benefits can dwarf all these. If Open Source inflates such costs, it may not be cheap at all.

In reality, Open Source can create costs for:

Product Selection. The range of products itself creates costs. In web content management, for example, there are a dozen credible Open Source products. And comparing them requires work: you can't send out an RFI, as most of them don't have a pre-sales organisation to respond. You have to do the analysis yourself. (The cost of pre-sales is built into proprietary licence fees. You pay for it whether you need it or not. Open Source just unbundles this cost, making it visible.)

Piloting. This analysis will probably include pilots and proofs of concept. These represent good practice when selecting any software, proprietary or Open Source, but you may need more of them for Open Source: the infrastructure of documentation, training companies, etc. tends to be less well developed.

Configuration and integration. Open Source doesn't mean non-commercial. The vendors still need to pay their mortgages. They often do this by charging for configuration and integration.

Customisation. When developers have access to source code, there's a risk they'll tweak it more than strictly necessary. (This can also make it more difficult to apply upgrades in future.)

Support. Community support for some Open Source products is excellent. Even so, many organisations want the certainty that comes with service level agreements. This requires paid-for support, another area where Open Source vendors make their money.

When you explore such costs, you may find that Open Source can be pretty expensive. It may still be cheaper than proprietary software. Or it may not. You need to do the analysis.

It may be Low Risk Software

As you do this analysis you may find that Open Source has a very different spend profile to proprietary software. Licence fees are often front-loaded: there's a large initial sum than a smaller annual support fee. Open Source incurs some upfront costs for product selection, but it never has that lump sum. Instead, you tend to proceed incrementally. After each increment, you decide whether to commit further.

Phasing commitment reduces risk. Consider what happens when you commit to a large upfront investment. In order to justify the investment, you look for additional benefits. Each of those requires changes to the system. Scope creeps. Before you know it, you have a much larger project. Yet there's one thing we know for sure about software projects: large ones are much more likely to fail. If Open Source helps avoid this trap, it can save a lot of money.

Open Source may provide other benefits too. For example:

Reduced lock in. Open Source is distinct to Open Standards, but most Open Source products work naturally with open standards. This can reduce the cost of

integrating with other systems. It can also reduce end-of-lifecycle costs to move from one system to another.

Easier integration. Encapsulation and information hiding are generally signs of well-designed systems, but sometimes you need to see how something works in order to understand how to work with it. Open Source facilitates this.

Fewer licensing issues. Proprietary licensing can require complex usage tracking and accounting. Open Source rarely requires this. This is a growing issue as organisations move to the "cloud": tracking licence usage as the number of virtual servers expands and contracts in response to demand can be a major constraint to deployment of proprietary applications.

Support for community-based innovation. Open Source often works well for "web 2.0" applications. It can also work well when developing systems that will be shared between non-competing organisations: Open Source licensing facilitates management of common intellectual property.

Most of these benefits come from reducing risk rather than directly reducing costs. But reducing risk is often the best way to reduce long term costs.

The Range of Applications is Growing

Open Source has traditionally been strong for techie tools. A programmer writes some code to solve a problem he's experiencing. He shares it with his mates, and an Open Source product is born. This model expanded to cover technical infrastructure (Linux, Apache), and then moved "up the stack" to databases and so on. Highly mature Open Source products are now available for many technical applications.

Products are now emerging for business applications too:

Web content management. Open Source grew in parallel with the web, so Open

Source content management systems (CMS) are often as mature and functional as proprietary ones.

Document management. Several Open Source document management systems have come onto the market in recent years.

Business Intelligence. Another area where strong products are emerging.

Customer Relationship Management. Open Source isn't as mature as some proprietary systems, but it's good enough for many purposes. Where CRM overlaps social media, Open Source often takes the lead.

Proprietary software may still have the edge for highly demanding transactional applications, but Open Source can compete in a growing range of domains.

Adoption is Growing

Open Source isn't a panacea, but it certainly has attractions. Is this translating into adoption across the public sector?

There are some high profile case studies. Whitehouse.gov uses Drupal, an Open Source CMS. The Metropolitan Police and the CIA also use Open Source CMS (suggesting they're happy about security). Several local authorities have made public commitments to Open Source. There's a vocal community of Open Source users within schools and universities. But it's hard to see whether such case studies constitute a trend.

This highlights another quirk of Open Source: being more community-based than proprietary software, it can be hard to gather comparable statistics. Traditional measures of market share, based on licence revenue, don't apply. So we're left with analyst surveys. These show a number of trends:

Coverage is growing. Most analysts now cover Open Source. Likewise, many

consultancies have Open Source practices. These firms wouldn't be moving into Open Source if they didn't see demand for it.

Most analysts believe adoption is growing. This is now an almost universal opinion, at least regarding corporate adoption of Open Source. It also applies to the public sector in many European countries.

The UK public sector is lagging. Another widely held opinion: the UK public sector is perceived to be lagging both other European countries and UK corporates.

What are the Barriers?

I suspect Open Source adoption is being held back by some systemic issues.

For a start, Open Source thrives in a knowledge-based economy rather than a purely financial one. A proprietary product dies quickly if it achieves few sales; an Open Source product can live for a long time on the enthusiasm of a small community. So, market-based filters are weaker. Likewise, few Open Source products invest in brand-building. This places the onus on purchasers to build their own knowledge.

Open Source also operates a different business model to proprietary software. It gains revenue from integration and support rather than licence fees. It unbundles elements like pre-sales support. It pushes revenue away from the centre (the vendor) out to a diffuse network of, typically small, integrators. Procurement processes that have grown around proprietary business models are ill-matched to this different model. For example, there is little incentive for Open Source vendors to get their products onto public sector catalogues: they get no direct revenue from product sales. Likewise, small integrators tend to avoid "bureaucratic" public sector procurements.

Stemming from this, procuring Open Source may require more work from the purchasing organisation. Without pre-sales support, purchasers need to undertake more analysis themselves.

They need developers to conduct pilots. They may need to actively encourage small integrators to bid for implementations. All this needs to be managed within the bounds of procurement law. Yet procurement officers often lack the time and skills needed to do this.

So it would hardly be surprising if procurement officers are reluctant to consider Open Source options. Open Source does indeed offer attractions to the public sector. But until these bottlenecks are addressed, it's probably going to remain confined to the pockets of enthusiasts who are prepared to learn about it for themselves.

Graham Oakes helps people untangle complex technology, relationships, processes and governance. He can be contacted through www.grahamoakes.co.uk or at graham@grahamoakes.co.uk. He is a member of the committee of the BCS Open Source Specialist Group, and much of the information in this article is derived from its meetings. However all opinions expressed here represent Dr Oakes' personal view. His book *Project Reviews, Assurance and Governance* is published by Gower.

(This article was originally published in Government Technology in 2011)

Open Standards – UK Government suspend policy pending further investigation?

Contributed by Mark Elkins, Chair, OSSG

There has been considerable debate and in some cases furore about a Procurement Policy Note – Open Standards when specifying IT requirements , Information Note 09/11, 30 November 2011

(http://www.cabinetoffice.gov.uk/sites/default/files/resources/20111130_PPN%2009_11%20Open%20Standards.pdf).

The effect of Note 09/11 is that it "...updates and supersedes Procurement Policy Note 3/11, Use of Open Standards when specifying ICT requirements". Note 3/11 in short stated "The Government

ICT Strategy (March 2011)¹ stated that the Government will create a common and secure ICT infrastructure based on a suite of agreed, open standards". This requirement has been withdrawn by Note 09/11 on the grounds that as a result of a recent survey "...many questions...need to be investigated in more detail to ensure that the open standards policy is robust and delivers the outcomes Government is seeking to achieve in providing better services for less cost".

However some media reports such as <http://www.computerweekly.com/blogs/publicsector/>

[2011/12/open-standards-rift-tears-uk-p.html](http://www.computerweekly.com/blogs/publicsector/2011/12/open-standards-rift-tears-uk-p.html) or

<http://blogs.computerworlduk.com/openenterprise/>

[2011/12/uk-government-open-standards-the-great-betrayal-of-2012/index.htm](http://blogs.computerworlduk.com/openenterprise/2011/12/uk-government-open-standards-the-great-betrayal-of-2012/index.htm)

contains claims that the decision to withdraw Note 3/11 is due to pressure from proprietary software vendors.

Cabinet Office document "Open Standards Survey Outcome" (the survey referred to in Note 09/11)

http://www.cabinetoffice.gov.uk/sites/default/files/resources/20111124_OpenStandardsSurveyOutcome_FINAL.odt published

in November 2011 outlines in the final chapter the next steps to be undertaken with regard to Open Standards. This includes setting up an Open Standards Board and "Providing transparent access to discussions on standards, ensuring open engagement with people, to gather ideas and options, informing balanced decisions".

Thus whether or not it is fair to claim the UK Government is bowing to pressure from certain parts of the proprietary software industry with regard to Open Standards is not crystal clear at this point in time. Certainly though this is one to watch because many argue that Open Standards are critical to the increased use of Open Source across HM Government.

Can Open Source Rise to the Boardroom Challenge?

Contributed by LinuxIT

Can Open Source technologies and expert related outsourcing lead to a virtuous relationship between the Board, organisational IT management, systems and the customer? LinuxIT explores the topic...

Well the Information Age is well and truly here and all pervasive impacting upon learning, the labour market, how we live our lives, how business is managed, and how and what customers buy.

New Generation IT

The impact IT systems technology can have in 'empowering the Boardroom' requires Directors to demand systems that will enable them to achieve their aims. This does not necessarily mean increased investment, often the opposite, but does require a paradigm shift among IT system specialists to actively pursue 'new generation' IT strategies and technologies. This new thinking includes Free Open Source Software (FOSS), alongside expert IT Outsourcing. A move to 'Open Computing', often in the context of blended systems, a mix of proprietary and Open Source technologies, delivering technology advances such as Virtualization and private Cloud.

This article explores the emerging external drivers and common strategic management needs of those managing organisations in the private and public sectors in the context of the FOSS opportunity and how its adoption and deployment can facilitate organisational success.

In this the key strategic management drivers were:

- Value creation
- Cost reduction
- Productivity – doing more with less
- Business agility
- Customer centred innovation

While the solutions were based upon the quality of:

The business aims, planning and resources

Strategy implementation

Information management

Financial control

Communications

IT system flexibility, reliability and security

A blended approach

Of course in today's IT world it is no longer an 'all or nothing' scenario in which customers and vendors choose to use either proprietary or Open Source software (OSS). Instead, it is a progressive and pragmatic world where the OSS vs. proprietary software dichotomy is replaced by one of healthy competition and cooperation making blended interoperable deployments a perfectly acceptable, and often advisable, solution.

The key to success is determining which projects make sense for Open Source. Savvy organisations tend to consider both proprietary and Open Source options for projects, and choose the right product for the given situation i.e. ROI calculations must be undertaken using the proper time horizons and with due consideration of the risks/rewards downstream.

Above all software, and any supporting expert services, must stand on their own merits and be objectively measured in terms of quality, reliability, security, flexibility, reliability and value for money - in relation to alternatives. This requires informed, impartial advice. Something we have been offering for over 12 years.

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Can Open Source alter the concept of unemployment?

Contributed by Mark Elkins, Chair, OSSG

"Gross domestic product (GDP) refers to the market value of all final goods and services produced within a country in a given period"

http://en.wikipedia.org/wiki/Gross_domestic_product). Software created through Open Source activity might be viewed as Services and where this is combined with a physical product such as a car

(<http://oshug.org/pipermail/oshug/2011-August/000122.html>) this perhaps might be described as Goods. Thus in theory an increase in Goods and/or Services might logically equate to an increase in GDP. Clearly however those Goods and Services must have some form of market value in that there is a need/demand for them.

It would be difficult to argue that Open Source software such as Firefox, LibreOffice, or the different versions of Linux do not fulfil a need/demand and thus have no economic value. Indeed it is commonplace for Open Source software solutions to be supplied by commercial organisations to customers within what might be termed the “free market” (<http://stats.oecd.org/glossary/detail.asp?ID=6264>). However the concept of Open Source means that many people/organisations contribute to it for reasons other than immediate financial gain in that they are not expecting any direct payment for contributing. This is obviously different from the de facto “free Market” model where essentially people go to work to exchange their labour for monetary wages.

For some time now in the United Kingdom (UK) and many other advanced economic nations there have been high levels of unemployment. This means that a large number of people are simply not able to exchange their labour for monetary wages. There are many problems associated with this phenomenon such as higher crime rates, serious health problems, low self-esteem, and a general feeling of not being part of society.

So what can Open Source activity do about this? In the first instance might it not be acceptable to suggest that those unemployed in the traditional sense could still add to GDP by being involved in Open

Source software projects? Therefore in an unconventional sense they might be seen as employed. At the very least such involvement with Open Source software projects surely must help in making individuals feel of value to society. I might also suggest that this idea fits with David Cameron's Big Society concept in that the opportunity is there through Open Source to produce benefits for society through voluntary activity.

Another possibly way Open Source could alter the concept of unemployment is that people engaged with the Open Source community are in fact keeping their skills up to date. Such opportunity probably would not be possible in the traditional world of employment simply because unemployment offers no chance to practice skills in such a meaningful way. Better still the unemployed can engage in 'cutting-edge' innovative Open Source projects that push forward technological boundaries. In the traditional world of business, 'spin-offs' from such projects might well lead to increased employment opportunities as indeed could the resulting interaction between the unemployed and business working in partnership.

Alternatively if Open Source software coding brought about by open collaboration can solve problems then perhaps Open Source activity might be able to crack economic and social code to bring about solutions to reduce or even eradicate unemployment.

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Contributing to the OSSG newsletter – please send your contribution to The OSSG newsletter Editor, Sarah Davey, LinuxIT at: sarah.davey@linuxit.com. Submissions must be in electronic format, as plain text.

In all cases, the views expressed are those of the authors and are not necessarily those of the Editor, the Open Source Specialist Group (OSSG), the BCS or LinuxIT.

The OSSG newsletter is compiled by LinuxIT, specialists in Open Source software and related services. More at www.linuxit.com.

