

# OLE Futures

*Impact of Open Source Business Models*

# Background

- **Kuali Foundation**

- Administrative organization for open source projects in HE
- Provide legal entity - Educational Community License
- Financial and event management
- Robust community of commercial affiliates
- Collaborative community of shared expertise

- **Kuali OLE**

- Community source project to build library management services platform
- Driven by the functional needs of the partnership
- Funded by the Partnership and multiple grants from the Mellon Foundation

# Open Source Business Models

- Community source
  - Driven & sustained by investors
  - Code development directed by investor interests
  - Commercial support friendly
  - Quali, Apereo, DuraSpace
- Corporate backed patronage
  - Driven & sustained by commercial interests
  - Push adoption or setting of standards
  - Breaks monopolies – i.e. Windows or Internet Explorer
  - Apache, Redhat Linux, Firefox
- Developer driven
  - Driven & sustained by developers
  - Code development directed by developer interests
  - Difficult to commercialize
  - LibreOffice, Gimp, Evolution
- Professional open source
  - Driven by commercial needs
  - Sustained by fees - SAAS, support, development, etc
  - Code development is directed by commercial entity
  - Instructure, QualiCo

# Kuali at a Decade

## Concerns

- Takes too long
  - Slow & sporadic development
  - Difficult upgrades
- Where's the stampede?
  - Incomplete suite
  - Lack of sales & marketing
- Sustainability and growth
  - Partner fatigue
  - Perceived risk in community to business model
  - Competitiveness

## Response

- Increase development velocity
  - Professionalize developers
  - Agile & incremental updates
- Establish for-profit incentives
  - Change license to AGPL3
  - Establish income model based on hosting & multi-tenancy
- Endorse professional, open source entity
  - Provide corporate risk mitigation
  - Develop HE-appropriate, competitive suite

# Impact on Kuali OLE

- Opportunity to evaluate our current state & needs
  - Increase development velocity while recovering innovative capacity
  - Address technical debt
  - Improve attractiveness for potential adopters
- Kuali OLE Board determined that this analysis should start with an analysis & restatement of OLE's ultimate goal
  - Open, community-supported next generation library services platform
  - Platform with which to build differentiating library services
  - Product with curb appeal
  - Able to integrate across systems & services
  - Accessible functionality through APIs
  - Product easily maintained, upgraded, and customized locally
  - Collaborative community of value and support
- Evaluate how these goals align with our community & how to address our

# OLE Core Values

OLE is committed:

- To **sustaining a community** focused on **delivering an open source library management system** that is freely available to implement
- To **building an inclusive partnership** focused on **sustaining OLE** through financial support, functional and technical design, software development, and user support for OLE implementers
- To researching, designing, and deploying **high-quality, standards-based next-generation technology**
- To **re-examine library business operations** to lead the library community through **innovation and business efficiency**, particularly in the diversifying of library collections in digital formats and new approaches to managing the scholarly work.
- To **building a core technology environment** that **leverages integration** with enterprise-level systems
- To **encouraging a services-based ecosystem of open innovation** for applications focused on discovery, open data integration, user experience and accessible, data analysis, and much more

# Futures Team Process

- Assessed project resources
- Researched options for technical development
- Reviewed project alignment with its administrative home

# Findings

- Transformation is necessary but not urgent
- Position the project to ...
  - leverage commercial & open source tools
  - strategically coordinate commercial dev opportunities
  - refine the partner contribution program
- Expand the partner base

# Next Steps

- Review the strategic development plan
- Develop a long term budget plan, including contingencies
- Assess resources needed to achieve goals
- Align the project with the appropriate community
- Create a transition time-line --18 months

# Questions

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