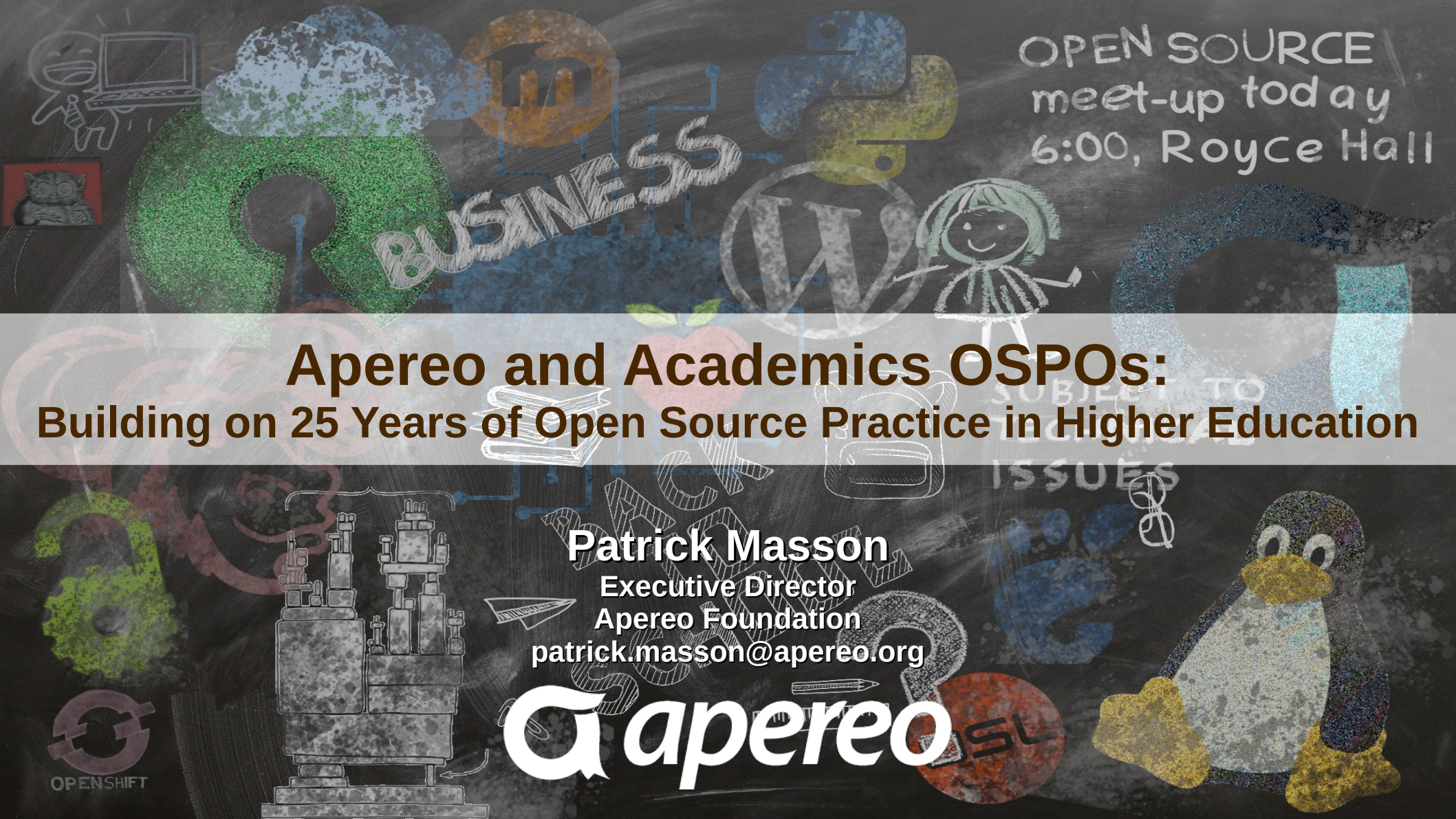
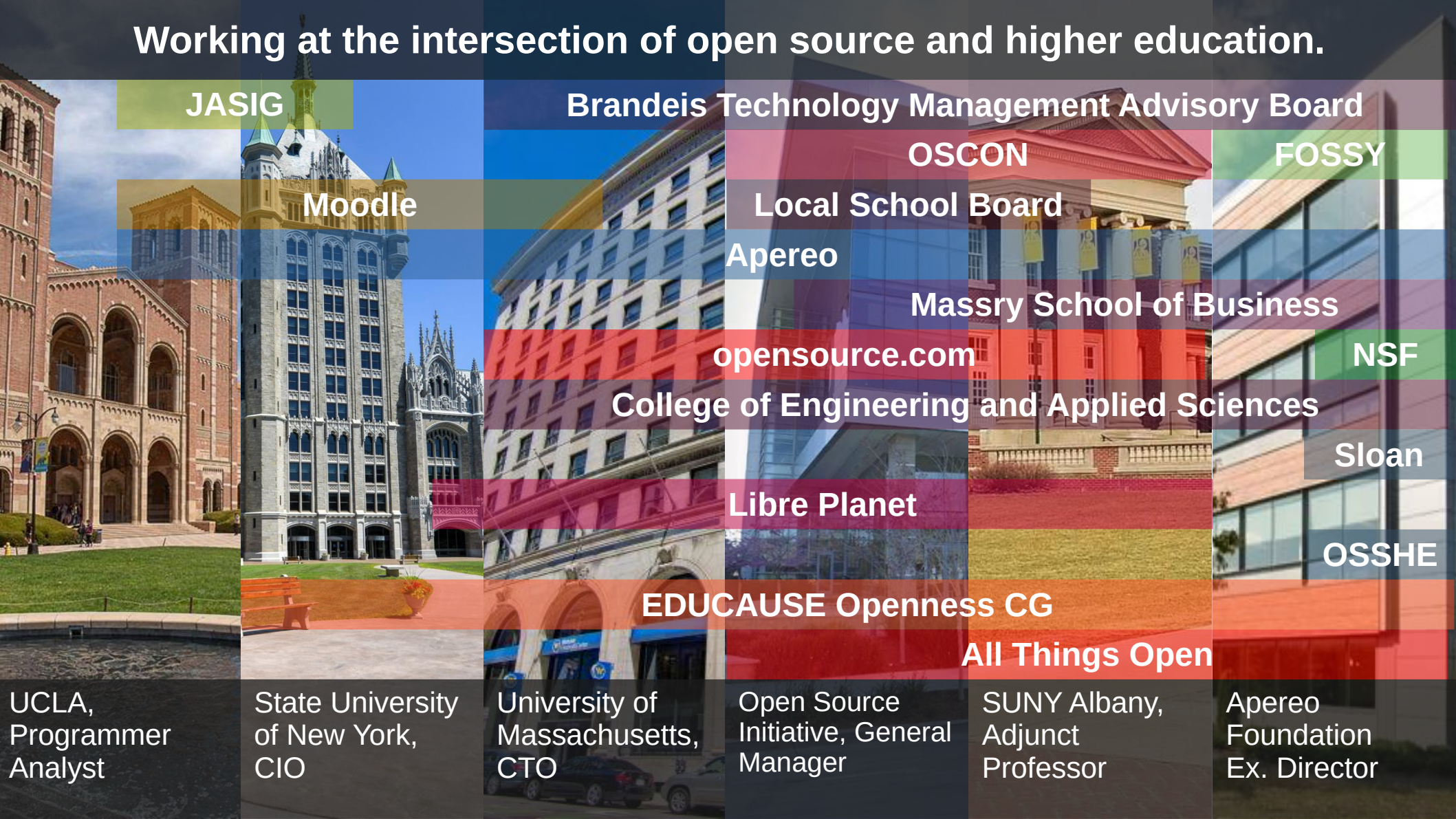


Apereo and Academics OSPOs:
Building on 25 Years of Open Source Practice in Higher Education

Patrick Masson
Executive Director
Apereo Foundation
patrick.masson@apereo.org

apereo

Working at the intersection of open source and higher education.



JASIG

Brandeis Technology Management Advisory Board

OSCON

FOSSY

Moodle

Local School Board

Apereo

Massry School of Business

opensource.com

NSF

College of Engineering and Applied Sciences

Sloan

Libre Planet

OSSHE

EDUCAUSE Openness CG

All Things Open

UCLA, Programmer Analyst

State University of New York, CIO

University of Massachusetts, CTO

Open Source Initiative, General Manager

SUNY Albany, Adjunct Professor

Apereo Foundation Ex. Director

1. If higher education helped create the open source movement, **why are universities now looking to corporations** to learn how to manage it?

2. **Can an OSPO model designed around corporate priorities serve universities** driven by research, teaching, academic freedom, and the public good?

3. **Do universities each need another office** to manage open source, or should academic OSPOs build on decades of historic practice initiatives, diverse communities, and existing foundations to create something fundamentally different?

```
# Connect to the University of California, Berkeley
$ ftp ftp.berkeley.edu
Connected to ftp.berkeley.edu.

Name: anonymous
Password: student@university.edu

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$ cd application

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$ more README
$ vi Makefile

# Compile the application
$ make

# Install the compiled application
$ su
Password:
# make install
# exit

# Run the application
$ application
```



Where did…

Free and Open Source Software

. ..begin?

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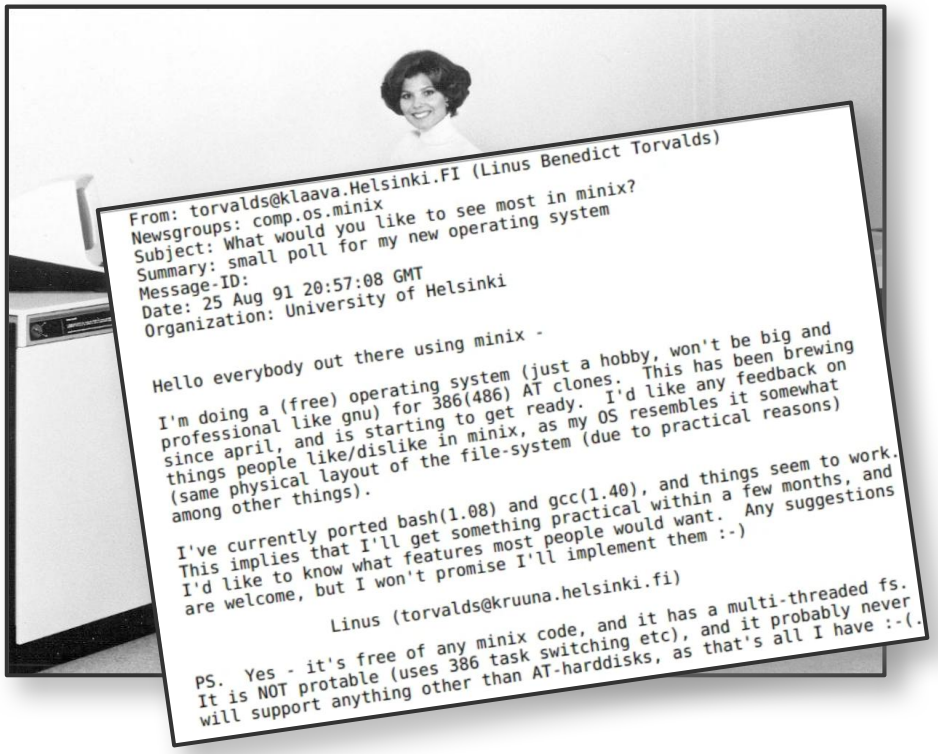
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```



1999 / 2000
Carnegie Mellon



1984 / 1988
UC Berkeley



1978 / 1993
UC Berkeley



1997 / 1993
National Autonomous University of Mexico



1983
MIT



1997
Cornell University



1989
MIT



1991
University Helsinki



2000
U Illinois Urbana–Champaign



1999
Curtin University



1993
U Illinois Urbana–Champaign



1986
UC Berkeley



1993
University of Auckland.



1984
MIT



2003
University of Cambridge

...and many, many others.

Where did…

Free and Open Source Software

. ..begin?

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Password:
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University of Indiana (2000)



Cornell University (1997)



Brigham Young University (2008)



University of Waterloo (1999)



Curtin University (2002)



University of British Columbia (1995)

Where did…

Free and Open Source Software

. ..begin?

Higher Education ***today*** is a consumer, not producer, of technology.



aws
Canvas By Instructure
D2L
Jenzabar
ORACLE
workday
Blackboard
Canva
Ellucian
Microsoft
salesforce
zoom

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Password:
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```



"The Google Open Source Programs Office dates back to 2004, making it one of the first OSPOs in the industry."

Google — About Google Open Source, February 5, 2022



"Sun has created an Open Source Office (OSO) under chief open source officer Simon Phipps"

The Register — Sun Opens Open Source Office, August 19, 2005.

Where did…

The Open Source Program Office

. ..begin?

```
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Clarkson

"The Clarkson Open Source Institute (COSI) was founded in the fall of 2001 to promote open source software (OSS) and provide equipment and support for student projects."

Applied Computer Science Labs — Clarkson Open Source Institute: Founded in 2001, May 26, 2016



1998



2004



Rensselaer

2006



2007

Where did…

The Open Source Program Office

. ..begin?

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apereo
Serving the Academic Mission

"Apereo was formed by the merger of two organizations that were pioneers in the development and use of open source software in higher education; Jasig and Sakai. "

Sakai Foundation — Plan For Consolidation, October, 2010

jasig **1998**

Sakai **2004**

Rensselaer **2006**

2007

Where did…

The Open Source Program Office

. ..begin?

Ten… twenty years of sustainability!



University of Washington: **2002**



Yale University: **2005**



Code for Science & Society: **2013**



Penn State University: **2015**



HEC Montréal: **2014**



University of South Australia: **2016**



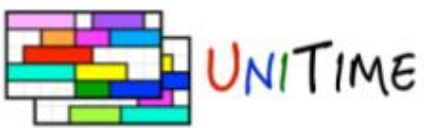
UC Berkeley: **2007**



Pearson Education: **2017**



University of Michigan: **2004**



Purdue University: **2007**



Cornell University: **2001**



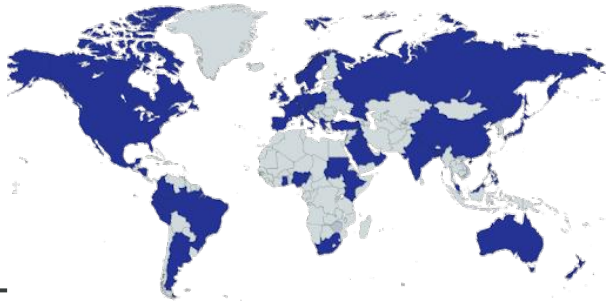
University of Nottingham: **2008**

apereo

28 YEARS EXPERIENCE

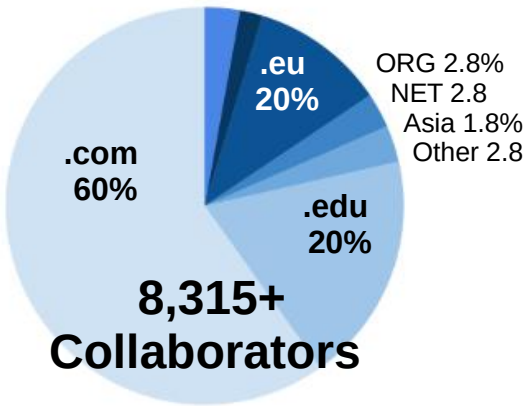
15 OPEN SOURCE PROJECTS

5 COMMUNITY INITIATIVES



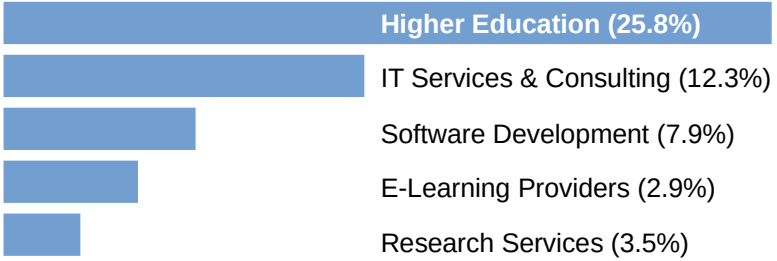
95 Commiting Institutions

753+ Contributors



- Apereo Student Tech Guide
- Co-Leader EDUCAUSE Openness Community Group
- Higher Education Open Source Assessment Tool
- Organizer, Open Source in Higher Education, ScaLE
- Organizer, Open Source in Higher Education, FOSSY
- Open Renaissance Group
- Open Source in Higher Education Report
- Open Source Funding Tracker
- Open Source Grant Funding Prioritization Framework
- Guide to Sustaining Open Source Research Software

COMMUNITY PROFILE



2023-2026 MONTHLY MicroConferences

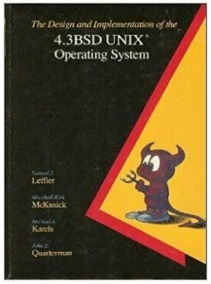
1500+ REGISTRANTS
800+ INDIVIDUALS
60+ COUNTRIES
300+ CAMPUSES

Director, 127 | **Manger, 72** | Librarian, 59
Faculty, 52 | Instructional Design, 44
Researcher, 38 | Developer, 37
Technologist, 37 | **CIO/CTO, 27**
Executive Director, 25 | CEO, 23
Vice President, 21 | Dean, 11

BOARD LEADERSHIP

Higher Education,	78%
Executive Leadership	46%

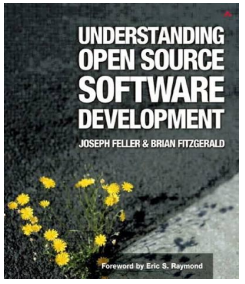




1994: Berkeley



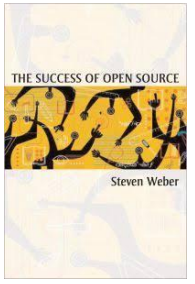
1999: Berkeley, MIT, Harvard



2002: University College Cork



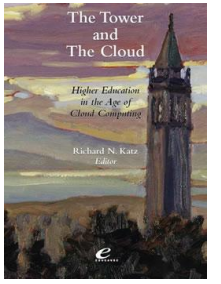
2004: Vienna University



2004: Harvard

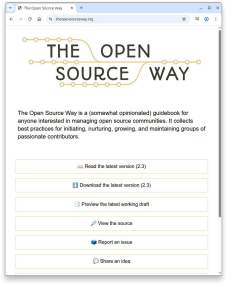


2005: Cork, Limerick, CMU, MIT/Harvard



2008: EDUCAUSE

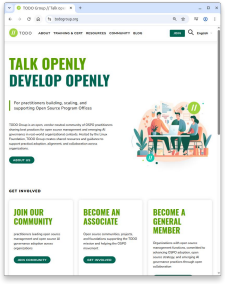
If higher education helped create the open source movement,
why are universities now looking to corporations
to learn how to manage it?



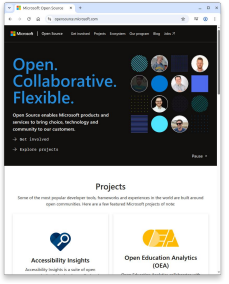
2009: Redhat



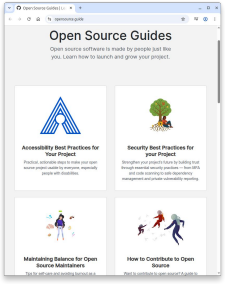
2013: Netflix



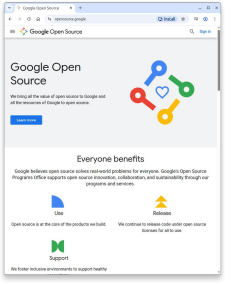
2014: Todo Group



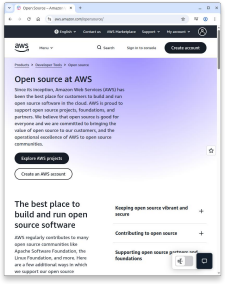
2015: Microsoft



2017: Github

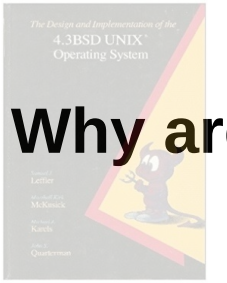


2017: Google



2018: AWS

Why are universities now looking to corporations?



1994: Berkeley



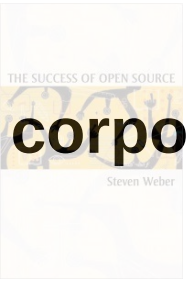
1999: Berkeley, MIT, Harvard



2002: University College Cork



2004: Vienna University



2004: Harvard



2005: Cork, Limerick, CMU, MIT/Harvard

2008: EDUCAUSE

Tech, Not Academic Mission

Consumers

Reduce/Mitigate Risk

Lack of Experience

Success Criteria

Procurement Process

“A single throat to choke”

Competitors, Not Collaborators

2009: Redhat

2013: Netflix

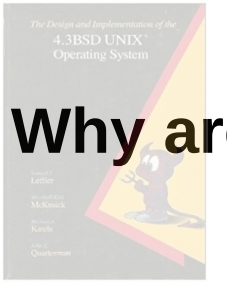
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2015: Microsoft

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2017: Google

2018: AWS



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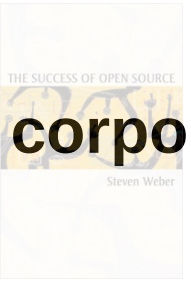
1999: Berkeley



2002: University



2004:



2004:
Harvard



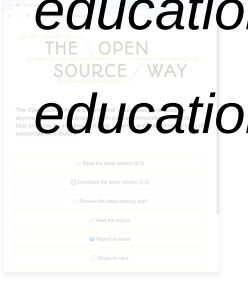
2005: Cork, Limerick,
CMU, MIT/Harvard

2008:
EDUCAUSE

Why are universities now looking to corporations?

Tech, Not Academic Mission:

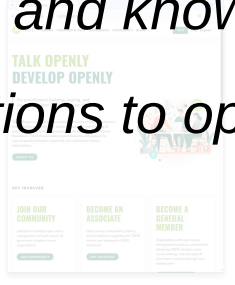
Universities increasingly look to corporations for leadership as campus IT departments have evolved into operational service providers (much like facilities departments) focused on managing infrastructure, systems, costs, and risks rather than directly advancing the academic missions of education, research, and knowledge creation that originally drove higher education's contributions to open source.



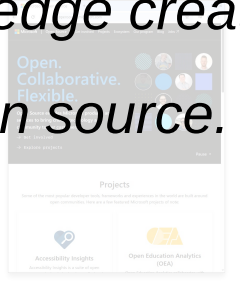
2009: Redhat



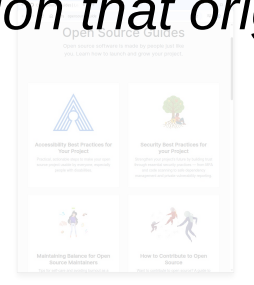
2013: Netflix



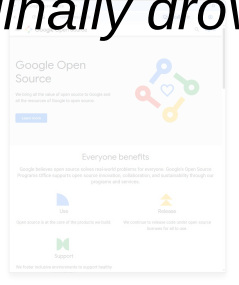
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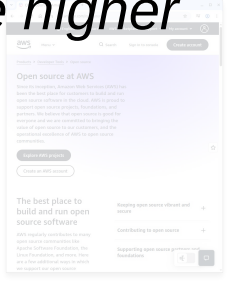
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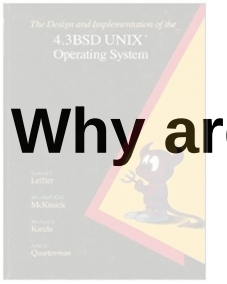


2017: Google



2018: AWS

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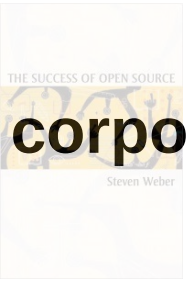
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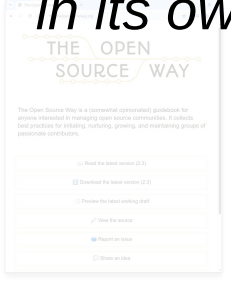


2005: Cork, Limerick, CMU, MIT/Harvard

2008: EDUCAUSE

Consumers:

Universities have increasingly shifted from producers of software to consumers of commercial technologies, outsourcing development, maintenance, and support to corporations they now regard as experts, creating a dependency that has diminished higher education's confidence in its own capacity to develop, govern, and sustain open source software.



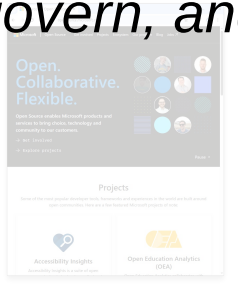
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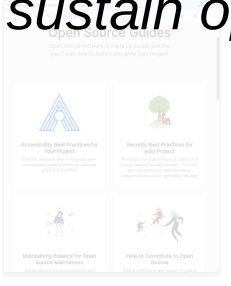
2013: Netflix



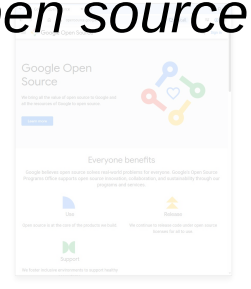
2014: Todo Group



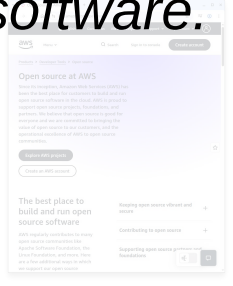
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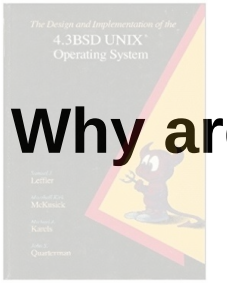


2017: Google



2018: AWS

Why are universities now looking to corporations?



1994: Berkeley



1999: Berkeley



2002: University College Cork



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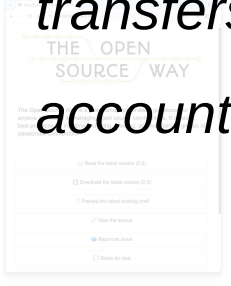


2005: Cork, Limerick,
CMU, MIT/Harvard

2008:
EDUCAUSE

Reduce/Mitigate Risk:

Campus IT leaders often favor commercial software under the assumption that corporate solutions offer higher quality, more reliable support, and reduced institutional risk; however, outsourcing development and maintenance does not eliminate risk, it merely transfers responsibility and, perhaps more importantly, shifts accountability and blame when systems fail.



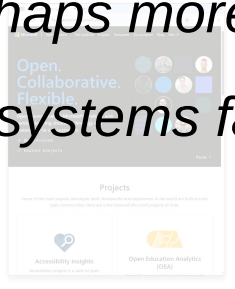
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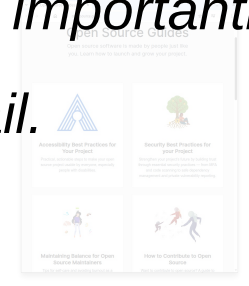
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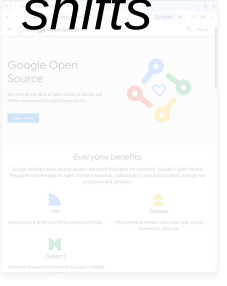
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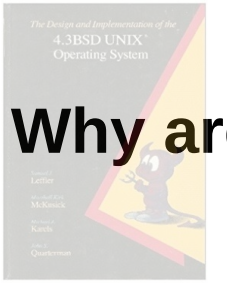
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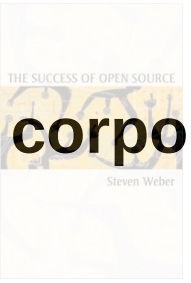
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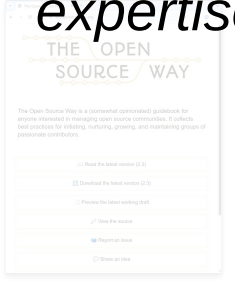


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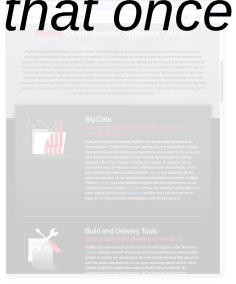
2008:
EDUCAUSE

Lack of Experience:

Many of today's campus IT leaders entered the profession after higher education's open source boom of the 2000s and 2010s, lacking firsthand experience developing, governing, and sustaining open source communities and projects, and consequently looking to corporations for expertise that once flourished within academia itself.



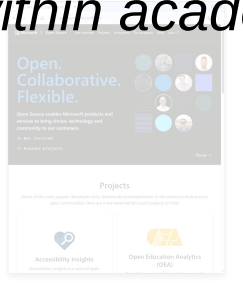
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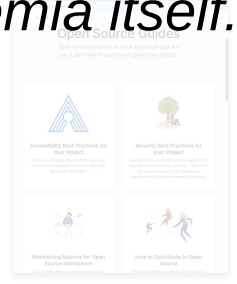
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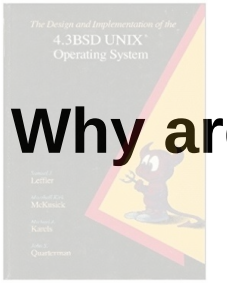
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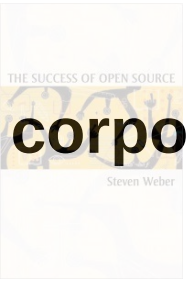
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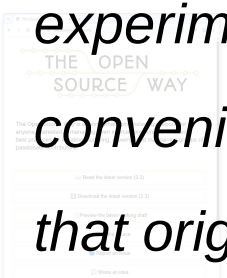
2005: Cork, Limerick, CMU, MIT/Harvard

2008: EDUCAUSE

Why are universities now looking to corporations?

Success Criteria:

Universities increasingly measure IT success through corporate metrics—cost reduction over service quality, operational efficiency over academic innovation, standardization over institutional differentiation, vendor consolidation over technological independence, and risk avoidance over experimentation—prioritizing business objectives and administrative convenience over the educational, research, and public-service missions that originally drove higher education's leadership in open source.



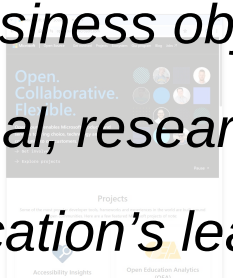
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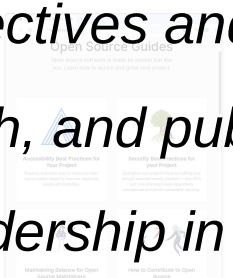
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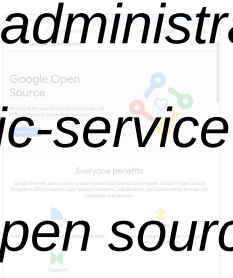
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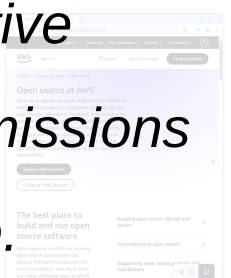
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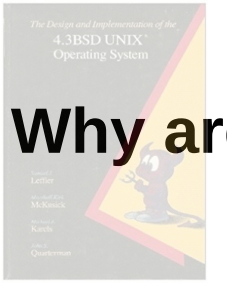
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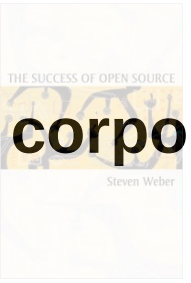
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Why are universities now looking to corporations?

Procurement Process:

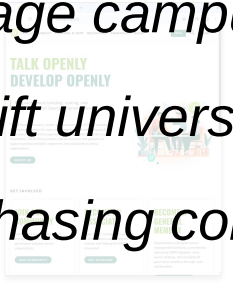
Higher ed. procurement policies, particularly state contracting requirements, often favor commercial vendors, standardized purchasing agreements, and predictable service contracts over internally developed or community-supported open source solutions, creating institutional barriers that discourage campus innovation, reinforce vendor dependence, and shift universities from developing their own technologies to purchasing corporate products and expertise.



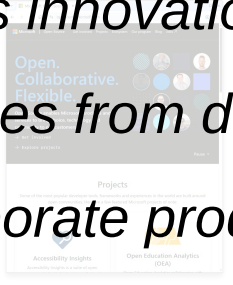
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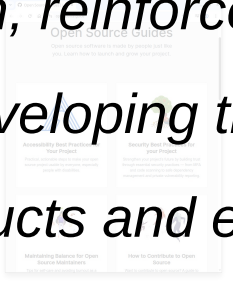
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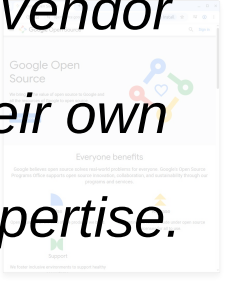
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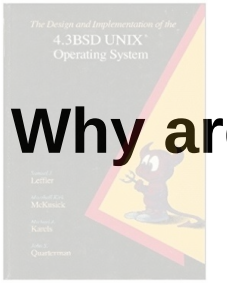


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2018: AWS



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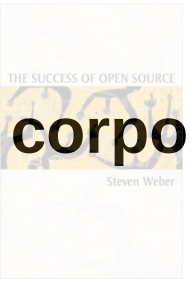
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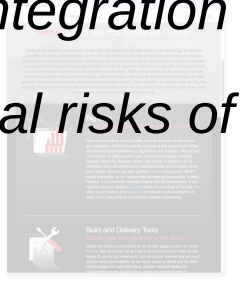
Why are universities now looking to corporations?

“Single throat to choke:”

Despite helping create the open source movement, universities increasingly embrace a “single throat to choke” philosophy, prioritizing comprehensive corporate enterprise solutions over independently managed open source projects to reduce the perceived administrative burden, integration complexity, project management responsibilities, and institutional risks of managing diverse technologies themselves.



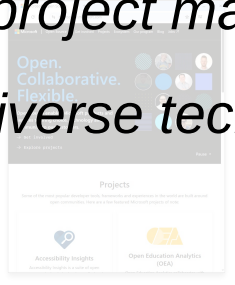
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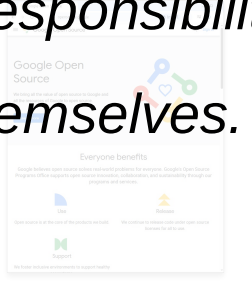
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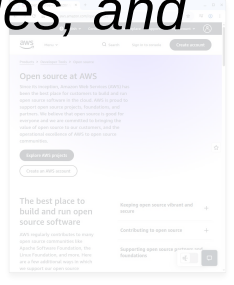
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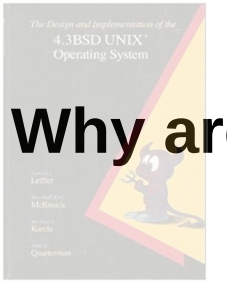
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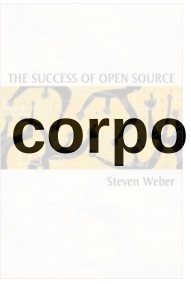
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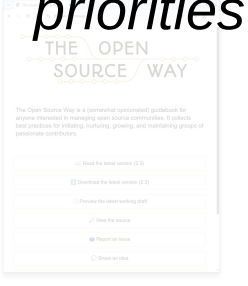
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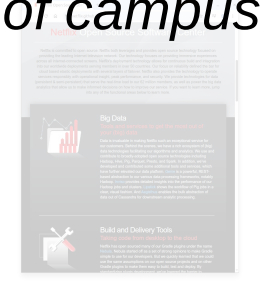
Why are universities now looking to corporations?

Competitors, Not Collaborators:

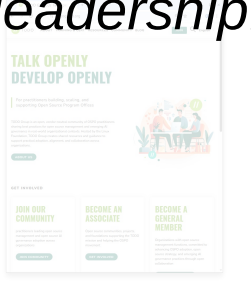
Although higher education helped create the open source movement, universities increasingly view one another as competitors for students, faculty, funding, grants, and institutional prestige, creating a tension between the collaborative principles of open source and the competitive priorities of campus leadership.



2009: Redhat



2013: Netflix



2014: Todo Group

2015: Microsoft

2017: Github

2017: Google

2018: AWS

Can an OSPO model designed around corporate priorities serve universities driven by research, teaching, academic freedom, and the public good?





A By-product, Not A Product

Inward vs. Outward Facing

Distributed vs. Centralized

Freedom vs. Alignment

Individual vs. Operational

Investigation vs. Innovation

Initiative vs. Investment

Profits vs. Public Good



Can an OSPO model designed around corporate priorities serve universities?

A By-product, Not A Product

Students, faculty, researchers, and staff develop open source software as a by-product of their primary work/interests. Companies adopt open source for business value to support and deliver products/services.



Can an OSPO model designed around corporate priorities serve universities?

Inward vs. Outward Facing

Universities typically develop open source software to address internal academic, research, and administrative needs, while corporations develop open source to pursue external market opportunities and strategic business objectives.



Can an OSPO model designed around corporate priorities serve universities?

Distributed vs. Centralized

Academic ecosystems and development communities are highly self-organizing, self-organized and self-directed.



Can an OSPO model designed around corporate priorities serve universities?

Freedom vs. Alignment

Corporations focus on driving/ensuring a shared direction, campuses foster academic and scholarly independence.



Individual vs. Operational

In higher ed individuals purse personal interests, advancing academic disciplines, and contributing to scholarly communities while in corporations, contributions are primarily operational, driven by employees fulfilling professional responsibilities, corporate objectives, and company interests.



Investigation vs. Innovation

Universities pursue open source as a means of inquiry, discovery, and advancing knowledge for the public good, while corporations leverage open source to accelerate innovation, gain competitive advantage, and create commercial value.



Can an OSPO model designed around corporate priorities serve universities?

Initiative vs. Investment

In higher education, open source development is often funded through external grants supporting educational and research initiatives; in corporations, through internal investments advancing strategic business objectives.



Public Good vs. Profits

Corporations leverage open source to generate profits and competitive advantage, while universities advance open source as a public good,expanding access to knowledge, education, and research for societal benefit.



Can an OSPO model designed around corporate priorities serve universities?





Does each university need another office to manage open source, or should academic OSPOs build on decades of historic practice initiatives, diverse communities, and existing foundations to create something fundamentally different?



Does each university need another office to manage open source

The Historical Context

Existing Open Initiatives

Alignment with Academia

Openness, Not Just Open

Self-Sustainability

Shared Services

More Joiners, Fewer Starters

MOOCs of 2026



Does each university need another office to manage open source

The Historical Context

If academics have decades of experience developing open source through diverse academic communities, collaborative initiatives, and established foundations, why replicate corporate OSPO models rather than build on this history to create something fundamentally different, and uniquely suited to higher ed.?



Does each university need another office to manage open source

Existing Open Initiatives

Higher education can draw on decades of experience advancing openness through Open Educational Resources, Open Content, Open Data, Open Access, Open Courses, and others; universities can build on their existing initiatives, lessons learned, shared practices, and communities.



Does each university need another office to manage open source

Alignment with Academia

Open source principles and practices are deeply rooted in academia's traditions of collaboration, peer review, open inquiry, and sharing knowledge; these same values can create networks where communities or practice cooperate across departments, disciplines, campuses, and consortia.



Does each university need another office to manage open source

Openness, Not Just Open

Openness, extending beyond software development, offers universities a model for digital transformation that empowers faculty, staff, and students with the agency to collaborate across disciplines and departments, actively participate in institutional decision-making, and drive technological, academic, and organizational change.



Does each university need another office to manage open source

Self-Sustainability

Self-Sustainability enables academic OSPOs to generate recurring revenue by extending shared services, expertise, and support across multiple projects, institutions, and organizations, creating a more predictable, diversified, and sustainable funding model than traditional reliance on grants, sponsorships, and donations.



Does each university need another office to manage open source

Shared Services

A federated shared-services model connecting OSPOs across diverse institutions—community colleges, libraries, research universities, academic departments, and campus IT—can pool resources, expertise, and capabilities to provide broader, more specialized, and sustainable support for open source projects than any single institution could deliver independently.



Does each university need another office to manage open source

More Joiners, Fewer Starters

Before establishing a new OSPO, campuses and academic units should seek partnerships with existing OSPOs, peer institutions, or support programs, leveraging established expertise and shared resources while contributing their own unique disciplinary knowledge, capabilities, and services to the broader community.



Does each university need another office to manage open source

MOOCs of 2026

The rapid rise of academic OSPOs risks repeating the MOOC hype cycle, where enthusiasm, institutional investment, and ambitious promises outpaced sustainable models, potentially squandering today's goodwill and credibility if universities fail to proceed with care, demonstrate lasting value, and build on existing expertise rather than simply launching new offices.



Questions... Comments?

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