Understanding Best Practices in Free/Open Source Software Development

Walt Scacchi
Institute for Software Research
School of Information and Computer Science
University of California, Irvine
Irvine, CA 92697-3425

Wscacchi@ics.uci.edu 18 October 2003

What is free/open source software development?

- Free (as in "freedom") vs. open source
 - Freedom to access, browse/view, study, modify and redistribute the source code
 - Free is always open, but open is not always free
- F/OSSD is not "software engineering"
 - Different: F/OSSD can be faster, better, and cheaper than SE
- F/OSSD involves more software development tools, Web resources, and personal computing resources

Who is investing in OSSD?

- Large corporations: (IT and Financial)
 - IBM-Eclipse, Sun-NetBeans and OpenOffice, HP-Gelato, Apple-Darwin, Microsoft Research-Rotor, SAP-DB, etc.
 - Barclays Global Investors, DKW
- Mid-size corporations:
 - RedHat, Novell
- Small (start-up) companies:
 - ActiveState, Collab.Net, Jabber, Ximian, JBoss,
 Compiere, etc.

Sample practices for F/OSSD

- Requirements and design
- Configuration management and work coordination
- Maintenance/Evolution
- Project management/career development
- Software technology transfer and licensing

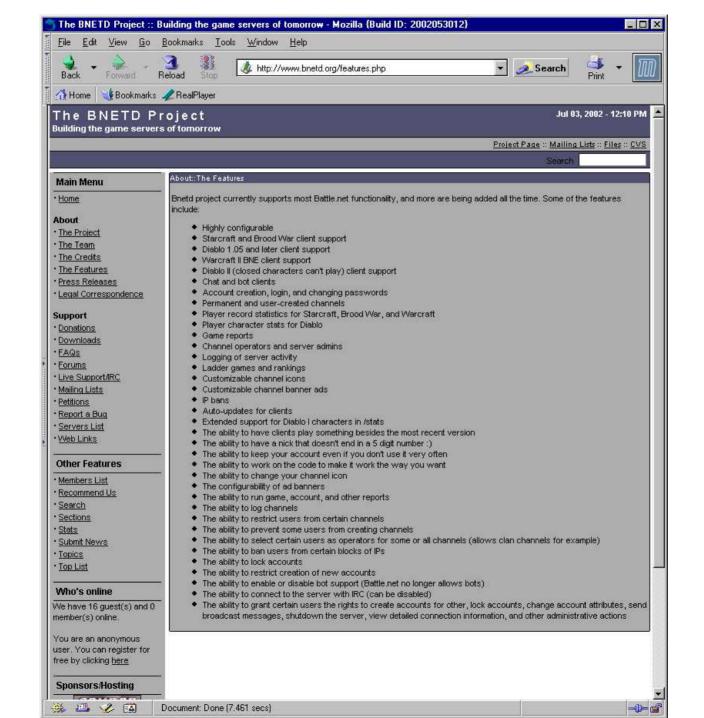
F/OSS Processes for Requirements or Design

- F/OSS Requirements/Designs
 - not explicit
 - not formal
- F/OSS Requirements/Designs are embedded within "informalisms"
 - Example OSS informalisms to follow (as screenshot displays)
- F/OSS Requirements/Design processes are different from their SE counterparts.

SE vs. F/OSS processes for Requirements

- Elicitation
- Analysis
- Specification and modeling
- Validation
- Communicating and managing

- Post-hoc assertion
- Reading, sensemaking, accountability
- Continually emerging webs of discourse
- Condensing and hardening discourse
- Global access to discourse



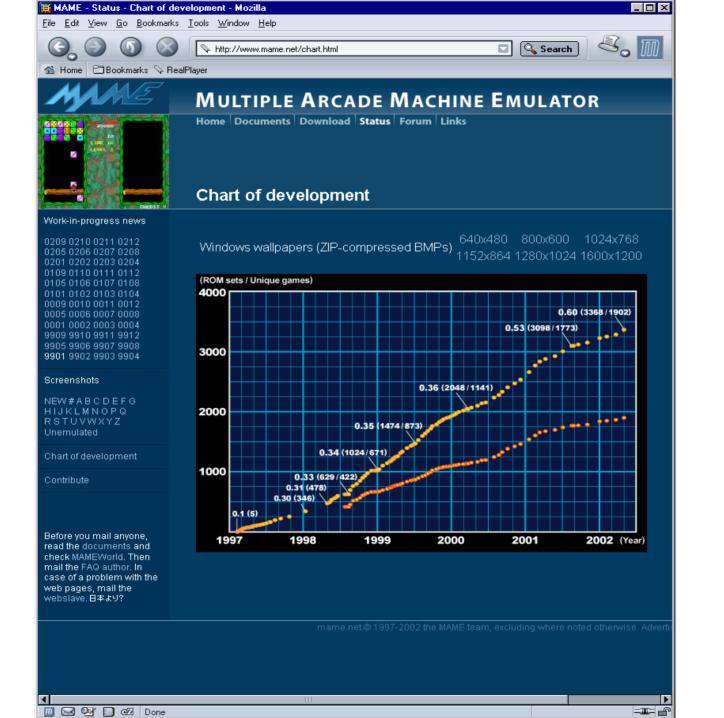
Configuration management and work coordination

- Use CM to coordinate and control who gets to update what part of the system
 - Many F/OSSD projects use CVS (single centralized code repository with update locks) and frequent releases (daily releases on active projects)
 - Linux Kernel: BitKeeper (multiple parallel builds and release repositories)
 - Collab.Net and Tigris.org: Subversion (CVS++)
 - Apache: Single major release, with frequent "patch" releases (e.g., "A patchy server")



Evolutionary redevelopment, reinvention, and redistribution

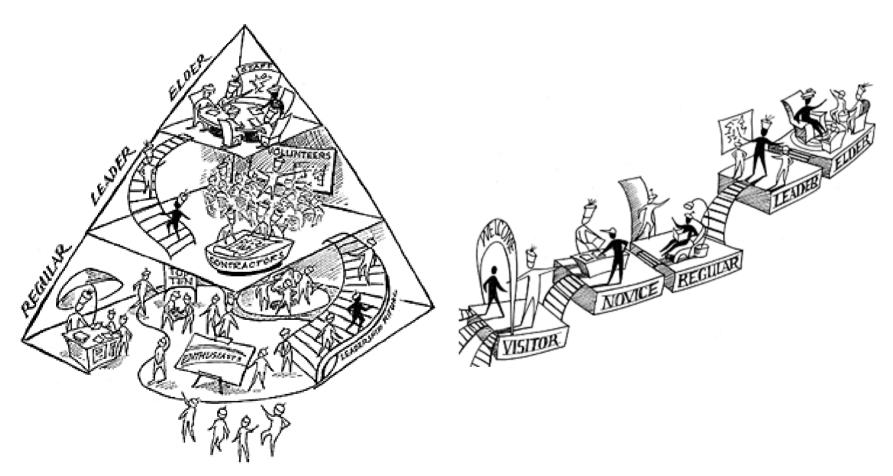
- Overall evolutionary dynamic of F/OSSD is reinvention
 - Reinvention enables continuous improvement
- F/OSS evolve through minor mutations
 - Expressed, recombined, redistributed via incremental releases
- F/OSS systems co-evolve with their development community
 - Success of one depends on the success of the other
- Closed legacy systems may be revitalized via opening and redistribution of their source
 - When enthusiastic user-developers want their cultural experience with such systems to be maintained.



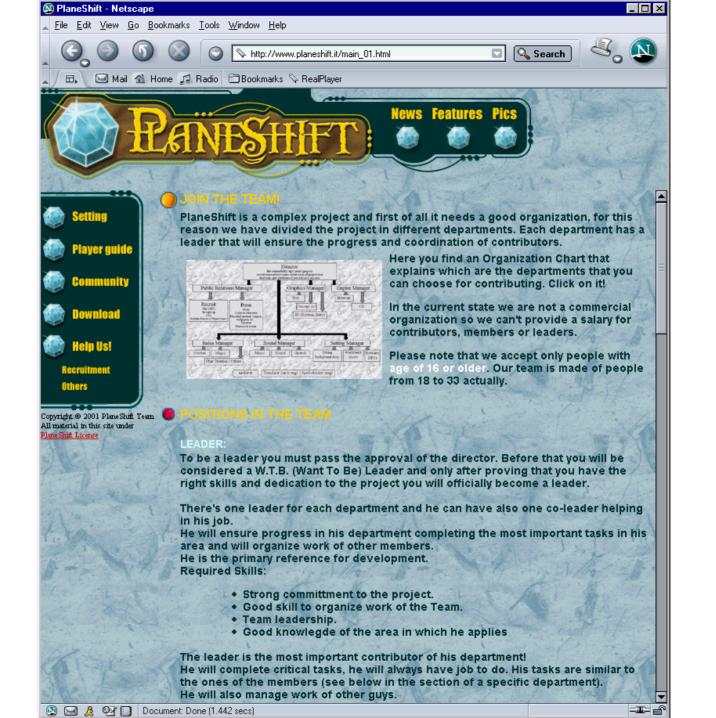
Project management and career development

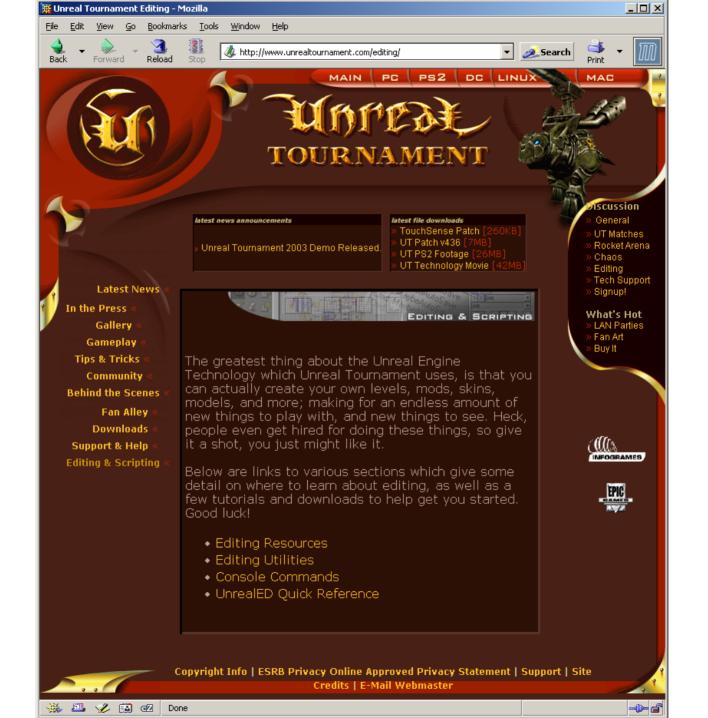
- F/OSSD projects self-organize as a pyramid meritocracy via virtual project management
 - Meritocracies embrace incremental mutations over radical innovations
 - VPM requires people to act in leadership roles based on skill, availability, and belief in project community
- F/OSS developers want to have fun, exercise their technical skill, try out new kinds of systems to develop, and/or interconnect multiple F/OSSD projects (*freedom of choice and expression*).

A pyramid meritocracy and role hierarchy for F/OSSD



(images from A.J. Kim, Community Building on the Web, 2000)





Software technology transfer and licensing

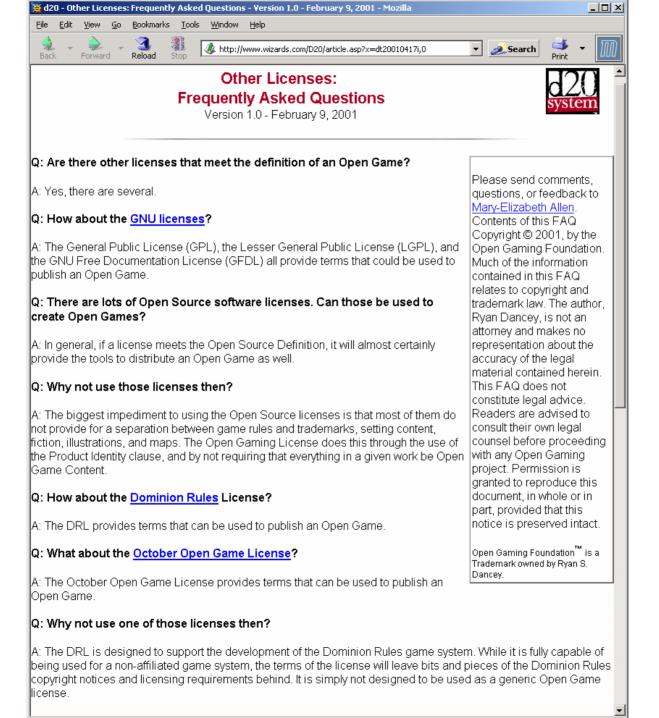
- F/OSS technology transfer from existing Web sites is a community and team building process
 - Not (yet) an engineering process
 - Enables unanticipated applications and uses
 - Enables F/OSSD to persist without centrally planned and managed corporate software development centers



Free/OSS licenses

Reiterate and institutionalize F/OSS *culture* (values, norms, and beliefs)

- GNU Public License (GPL) for free software
- More than 35 other open source licenses (http://opensource.org)
- "Creative Commons" Project at Stanford Law School developing public license framework



Implications

- F/OSSD is a community building process
 - not just a technical development process
 - F/OSS peer review creates a community of peers
- F/OSSD processes often iterate daily versus infrequent singular (milestone) Software Life Cycle Engineering events
 - F/OSSD: frequent, rapid cycle time (easier to improve) vs.
 - SLC: infrequent, slow cycle time (harder to improve)

Conclusions

- Developing F/OSS is different than software engineering
 - not better, not worse, but different and new
 - more social, more accessible, more convivial
- F/OSS systems don't need and probably won't benefit from classic software engineering.



Acknowledgements

- Project collaborators:
 - Mark Ackerman, UMichigan, Ann Arbor
 - Les Gasser, Ulllinois, Urbana-Champaign
 - John Noll, Santa Clara University
 - Margaret Ellliot, Chris Jensen, UCI-ISR
 - Julia Watson, The Ohio State University
- Funding support:
 - National Science Foundation, IIS#-0083075, ITR#-#0205679, ITR#-0205724, and IIS#-#0350754.
 - No endorsement implied.

References

see http://www.ics.uci.edu/~wscacchi

- W. Scacchi, <u>Understanding the Requirements for Developing Open Source Software</u>, *IEE Proceedings--Software*, 149(1), 24-39, 2002.
- W. Scacchi, *Open EC/B*: A Case Study in Electronic Commerce and Open Source Software Development, Final Report, July 2002.
- W. Scacchi, <u>Free/Open Source Software Development Practices</u> in the Computer Game Community, *IEEE Software*, Special Issue on Open Source Software, (to appear, 2004).
- W. Scacchi, <u>Understanding Free/Open Source Software</u>
 <u>Evolution: Applying, Breaking and Rethinking the Laws of Software Evolution</u>, revised version to appear in N.H. Madhavji, M.M. Lehman, J.F. Ramil and D. Perry (eds.), *Software Evolution*, John Wiley and Sons Inc, New York, 2004.