

Linux in 2009: Recession vs. GNU

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Pundits and business executives alike are predicting gloomy economic times for 2009. But when the talk turns to free and open source software (FOSS), suddenly the mood brightens. Whether their concern is the business opportunities in open source or the promotion of free software idealism, experts see FOSS as starting from a strong base and actually benefiting from the hard times expected next year.

That's not to say that challenges won't arise, but the consensus seems to be that 2009 presents more opportunities than difficulties for FOSS.

The Outlook for Business

The idea that software available at no cost will become popular in a recession is a no-brainer. As Peter Vescuso, VP of Marketing at Black Duck Software points out, "The recession is going to force a lot of people to be more careful with their spending, and look to get more and more value out of their resources as they spend." And, Vescuso adds, the pressure to do more with less will be particularly hard on IT departments, who are always under pressure to deliver efficient, uninterrupted service. Under the circumstances, interest in software that is available at no cost or only a small one is only natural.

But FOSS has many more advantages than simply being a cheaper way of building infrastructure. Jim Zemlin, executive director of the Linux Foundation, points out that not only is FOSS in general and Linux in particular well-supported, with billions of dollars of investment from top tier companies, but that, unlike Windows, it is "massively hedged," by which he means that it is available in every form from cheap notebooks through embedded systems to super computers.

"It's just unparalleled in computing in terms of its versatility and its diversification," Zemlin enthuses, adding that in the last year, "pretty much everyone has opened up their device drivers, giving it broad hardware support that is only going to increase over the coming year. Moreover, FOSS is already strong in areas such as virtualization, which many large organizations may turn to in their efforts to do more with less.

In fact, Zemlin sees Linux and the FOSS ecosystem surrounding it as having insurmountable advantages in any market over its main competitor Windows -- advantages that an economic downturn only intensifies. At a time when a search for the lowest possible price point is happening in such areas as notebooks, FOSS is available at no cost. It is easy to rebrand and customize in a way that Windows Isn't, and is also technically more efficient. "Lower cost, faster time to market, higher profit margins, better branding -- these are all things that are in favor of Linux and not in favor of Windows, he summarizes.

Zemlin predicts that FOSS will continue to dominate netbooks and consumer electronics, as it did in 2008, and gain significant marketshare in the mobile market, largely through Google's Android and [The Open Handset Alliance](#). The result, he says, will be "better technology into the commons, better power management, and better support on a wider variety of chipsets." In other words, the whole FOSS ecosystem will benefit directly from gains in this area.

Zemlin also sees FOSS as remaining strong on the server, with Linux continuing to be the major player. Most of Linux's growth in 2009, he says, will be "at the expense of Sun

Microsystems, which is floundering in its business model right now. People look at Linux, and they say, **HP, IBM, Dell, Intel and AMD** -- these are collectively not going to go out of business any time soon. Then they look at Sun Microsystems, and they say, 'Whoa! This company has some serious financial difficulties, they have an uncertain future -- that's not a safe bet for me.' Nobody is really growing much, but where there is growth, it's going to in Linux."

As for advances on the desktop, Zemlin, like many, laughs at the long-predicted "Year of the Linux Desktop." However, he quickly adds that that year may have already **passed in 2008 with the use of Linux in netbook computers.**

The only negative aspect Zemlin sees is that FOSS is likely to continue to be ignored by traditional software vendors in the coming year. "Software vendors need to see a growth in Linux demand and they need to see a consistent demand," he says. "This is the two-pronged challenge for Linux: **How do you provide the market that would encourage an ISV like Adobe to port PhotoShop over to Linux?**"

Zemlin has no answer to this question, but he clearly regards it as being of secondary importance in the current economic conditions. Asked if there were any downsides that FOSS might expect in 2009, Zemlin was succinct in his summary.

"No downside," he said. Linux is here to stay."

The Outlook for the Community

Peter Brown, executive director of the Free Software Foundation, suggests that the main concern for the FOSS community in 2009 could be funding for key projects. In hard times, donations are one of the first places where individuals and corporations alike are apt to cut back, so the possibility is very real that FOSS development may be slowed for lack of resources in 2009.

However, countering the possibility of reduced donations is the incoming technologically-savvy administration in the United States, **and the need of government and education alike to do more with less,** all of which could allow free software to make new inroads in the coming year. If president-elect Barack Obama keeps his promise to appoint a Chief Technology Officer (and the appointee is not Bill Gates or some other partisan of proprietary software), **"then I don't see how he could not consider free software,"** says Brown, pointing out its obvious advantages of low cost and high adaptability.

Brown thinks that the economic advantages of FOSS might create an atmosphere in which the ideals of free software -- that is, working to ensure that users are in complete control of the computer -- **could reach a larger audience.**

"I can't see how [the free software ideals] can fail to become more important in the coming year," says Brown. "As people depend more on more on technology, it's important to have a philosophy about technology, and **free software gives a strong baseline for what that means.**"

In particular, Brown sees an opportunity to promote **free software ideals in education.**

"We need to have a conversation about teaching children to be in control of the technology they use and not just teaching them to be consumers of technology," says Brown. "It connects well with the economic situation, trying to get teachers and parent associations to

become fundamentally aware of this issue, and to get in control of the technology that children are using. Why is it that we can send \$100 laptops to the poor children of the world with an understanding that there's a new paradigm for learning, yet here in the United States, no conversation has been had about how we educate our children?"

For Brown, such issues of community awareness are far more important than concerns about particular software, even the Free Software Foundation's high priority list of essential projects. FOSS in 2009 will inherit a number of technological issues from the past, including the state of software patents in the United States following 2008's [Bilski case](#), or the continued use of so-called Digital Rights Management technology by companies like Apple, but he suggests that such closely focused concerns will matter less than the opportunity to raise general awareness of FOSS in the general public.

"I would encourage all the vendors and the communities to say that this is the year that, if we increase the overall awareness, it will be good for every free software project and vendor," says Brown. "[2009] does seem a unique year, a unique opportunity to make free software a viable and meaningful option to society. It all comes down to political will. And that's something that the Free Software Foundation certainly wants to address in the coming year. I foresee more free software adoption through economic re-evaluation of the system."

Limits to Growth?

With no serious difference in opinion among experts, probably the largest question is how far FOSS adoption will go in the next year. Palamida, a company that sells FOSS management solutions, recently conducted a [survey](#) among its client base of companies earning fifty million per year and higher in a variety of industries, particularly financial services. Of the IT managers who replied, 45% said they would consider open source as a cost-saving measure -- but nearly 55% said they would not.

The reason for the resistance, suggests Theresa Bui, VP Product Marketing at Palamida, may be the rash of security-related headlines about FOSS in 2008, including reported vulnerabilities in Android, Asterisk, and Debian. Many of these problems, Bui points out, were due to the use of unpatched versions of free software, and all were quickly patched. She suggests that FOSS might be "a victim of its newness" among senior managers. All the same, such perceptions might seriously inhibit FOSS' ability to gain popularity during the coming year, recession or no recession.

So far, though, such concerns do not seem to be inhibiting interest. According to Vescuso, Black Duck, which also specializes in FOSS management, describes business as "better than ever," with increased business in the previous quarter of 2008 and a current quarter that looks even stronger. So, whatever the limits to FOSS growth in 2009, they may not be reached until some months into the new year.

The general agreement among experts is that not only is FOSS well-equipped to face the recession of 2009, but that those who adopt it will be better off when the hard times are over.

Jim Zemlin likens the benefit to wise investment on the stock market. "In a down market, those who have managed risk effectively by hedging it, spreading it out effectively, tend to come out ahead because they have the most cash that they can then invest as the market rebounds. Linux is in a similarly hedged position, and I think that we'll all benefit from that."