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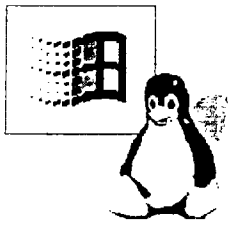
MS exec: What Linux threat?

A Microsoft executive says Linux has fundamental flaws, and is a 'weak' consumer and corporate operating system.

By *Scott Berinato*, PC Week
March 4, 1999 12:37 PM PT



REDMOND, Wash. -- Think of it as a burst of cold Redmond rain on the Linux parade.

In a far-reaching interview this week with PC Week Online, Microsoft Corp. (Nasdaq:MSFT) group product manager Ed Muth sounded off on the open-source operating system, outlining what he considers are fundamental flaws with the Linux business model and the OS itself.

"I see it as more of a threat to Unix. Linux is a challenge, a competitor," Muth said. "The more I study Linux, the weaker I think the value proposition is to consumers."

Technical misgivings

Muth delineated two main technical reasons why he believes Linux will not succeed with corporate customers.

First, a broad base of support for applications -- especially off-the-shelf, shrink-wrapped applications -- is necessary for a modern operating system, he said.

> 'We think the total cost of ownership of NT is lower than Linux.'
> -- *Ed Muth, Microsoft product manager*

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Thirty years ago, everything was custom, and the trend for the last three decades has been to make more software off-the-shelf," Muth said. A "design-by-community" ethos will not work in corporations, he said, where even highly customized applications such as ERP systems include much shrink-wrapped technology.

The second failing, Muth believes, is a low level of integration between the OS and its applications.

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It's a point that touches on ground where holy wars are fought.

Indeed, some Linux advocates say Linux's small footprint, efficient code and *lack* of integration with surrounding technology is what makes it appealing. Muth disagrees.

"People want more integration," he said. "They want to take a bar chart from Excel and put it in Word. On the server side they want strong queuing and security. This is all done through integration. Linux has a low degree of integration. Linux is basically a big step backward for those two reasons plus others."

Economies of scale

Muth next turned to the economics of Linux. He said his preliminary cost analysis showed Linux actually costs end users more than Windows NT.

"We have very little concern we can't compete with Linux on a TCO level," Muth said. "We think the total cost of ownership of NT is lower than Linux, but it's still hard to do good TCO studies because at the moment they're hard to compare since Linux supports so few applications."

"Let's say, for discussion, they are equally scalable," he said. "And let's assume applications are available for both, and setup time is the same. Given all these factors as equal, the best you could hope for is about the same cost per transaction between servers."

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But Muth turned that argument on its ear.

"The problem with that is there are fewer applications available for Linux, there's no long-term development road map, and there's a higher technical risk in using it," he said. "You could cut Linux some slack if it were sharply lower in cost per transaction than NT, but that's not the case."

Acknowledging the phenomenon

Muth did acknowledge the myriad forces that have propelled Linux into the spotlight, to the point that the OS was even featured recently in the New York Times Sunday Magazine.

Moreover, the LinuxWorld Conference and Expo this week was populated by major enterprise vendors, including IBM (NYSE:IBM), Hewlett-Packard Co. (NYSE:HWP), Compaq Computer Corp. (NYSE:CPQ) and Computer Associates International Inc. (NYSE:CA).

Muth attributed the open-source hype to a number of factors, including a lack of fairness in media coverage of Linux.

"We're all in the business of wanting the customer to have the information needed to make informed choices," Muth said. "We haven't seen a flavor of Linux coverage that addresses that. Some criticalness is needed."

For example, "some people say positive things about Linux when their message is anti-Microsoft," he said. "But I wonder, in 36 months is this the next [Network Computer] or is it a viable OS? We don't see people question the Linux numbers."

Indeed, those numbers have been startling. International Data Corp. attributed 17 percent of server OS shipments in 1998 to Linux, a 212 percent growth year over year. The Linux user community itself has been pegged at between 7 and 12 million.

But Muth pointed out that it's hard to track shipments of an open-source platform and its applications when they can be downloaded for free from any number of Web sites.

"We feel that 2 to 20 percent of Linux shipments turn out to be 'shelfware,'" he said. "From what we can tell, real-world deployments of Linux are very thin."

As for the vendor support at LinuxWorld, Muth wasn't surprised, adding that the media needs to apply the same critical eye to this trend.

"Take HP," he said. "They have long supported multiple OSes on x86. They are fundamentally in the hardware business. You would expect them to support Linux. But the deep investment is in NT. It's a human investment -- developers, support ... You have to separate out what OS they will install if you ask them and what investments they make."

But Muth's most passionate argument came on the development front, where he said capitalism is the wild card that many observers have been ignoring.

"I find it hard to believe that some of the best computer scientists in the world will want to do their work for free," he said. "Without a long-term technical road map, without multimillion-dollar test labs, someone wants me to believe these visionary programmers and developers will want to do the best work of their lives and then give it away. I do not believe in that vision of the future."

But hey, it's competition

For all its shortcomings, Linux is part of a larger competitive landscape in the server realm, Muth said.

"In the OS market, a fair person would see extraordinary competition," he said. "And the competition exists in terms of business model and channel model, and Linux is a very interesting case."

For Microsoft, that's key, since the question of whether it faces real competition in the OS

market has been a contentious issue in its ongoing antitrust battle with the Department of Justice.

Microsoft has done well in server market share, Muth said, but "we have lots of work to do in some parts of the market. Take the $100,000 to $1 million server range. We have less than 15 percent of that market."

"There is extraordinary competition," he reiterated. "The market is a rich mosaic of parry and thrust from the vendors. We have to earn our stripes every day. That's how it should be."

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On the stability of NT: ... - *Derek Suzuki*
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The reason Linux is beco... - *Ken*
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I work at MS. to tell yo... - *Ron*
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