



photo: Cindy Ellis

THE HUMAN FACTOR: People and processes are assessed before identifying the areas in which Linux will work quickly and with minimal disruption, notes Stafford Masie.

Linux, notes BMI-TechKnowledge, continues its march upmarket to become a true alternative to Unix and Windows solutions. With application and database vendors like IBM, Oracle and SAP now supporting it, Linux is finally also making inroads into corporate data centres, but is it enterprise-ready? Brainstorm investigates...

By Brian Bakker

Much of the confusion surrounding the heated Linux vs Windows debate, which has consumed the IT industry in recent time, has been due to dubious TCO and ROI figures bandied about by various parties.

But, as with all things, the truth eventually does come out. For those still trying to see the wood for the trees, all parties now appear to agree that each case is likely to yield a different set of numbers; and no "one-size-fits-all" calculation exists, simply because too many variables need to be considered.

LOCAL NUMBERS

Despite the apparent confusion in the market and while the debate raged, some local businesses were quietly deploying Linux in data centres and on the desktop. This is reflected in a BMI-TechKnowledge (BMI-T) study entitled "SA GNU Linux and Open Source Software and Services Market 2004-2009".

According to BMI-T, shipments of servers in South Africa by operating system (OS) in 2003 and 2004 saw Microsoft's market share move slightly from 77.6% to 77.4%

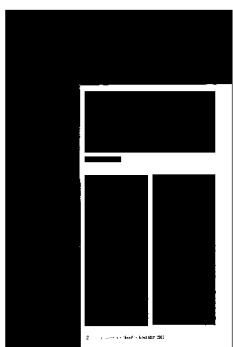
while Linux jumped from 13.8% to 16.5% – mostly at the expense of Unix and OS/400.

At the same time, author and services research manager at BMI-T, Roy Blume, concedes that Linux' share of the market may well be considerably higher.

"The Linux license model allows for multiple installations and free downloads; as such BMI-T believes that the actual growth of Linux usage exceeds the shipment growth illustrated in the above figures," he notes.

James Thomas, an independent contractor to Novell SA, agrees wholeheartedly with Blume's qualification and goes as far as saying Linux deployment estimates should be doubled or more. "These implementations, where it's actually flagged as per server shipment, would be officially validated as implementations. Corporates that buy brand name servers with Linux pre-loaded are often not aware of it."

He says this would not include servers that shipped with a different OS and were re-loaded later with a version of Linux downloaded from the Web. In such cases he notes that an adjustment would have to be made to the installed base of the original OS as well as for Linux but that would be difficult, if not impossible to quantify.



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– Roy Blume

“Such deployments would be under the radar screen,” he adds.

Thomas makes the point that the figures could be misleading because Microsoft OSs have been available in OEM pre-installed configurations on servers from the big three, IBM, Dell & HP as well as local OEM vendors for a long time. “In 2003-2004, which is the time-frame for the analysis, almost no one shipped pre-loaded Linux. The majority of pre-loaded agreements with the big three at least only started happening in 2004 and really kicked in this year,” he says.

“So the majority of Linux implementations, even though they may be brand name servers, may have shipped as Windows pre-installed servers and actually ended up being deployed as Linux systems.”

GROWING INTEREST

Nevertheless, BMI-T forecasts growth of 40% plus through 2009 and ties expected growth back to the introduction of enterprise-grade products during 2004.

“With the introduction of products from Red Hat, Novell, Turbolinux and other companies, the stage was set for Linux to continue its march upmarket to become a true alternative to Unix and Windows solutions, at least at the lower levels of scalability,” says Blume.

He lists four key factors that make enterprise-oriented Linux products more palatable to customers, including: longer supported life cycle, a broader ISV application portfolio, more scalable solutions and a family of products.

Thomas concurs: “Definitely with

regards to major players committing to supporting Linux server distributions for five, or even up to seven years and extending typical release cycles from a few months to a more palatable 18 months.

“Very often you see three or four releases

within a year in the open source community. This is not appropriate for a corporate environment where you’re applying proper governance, change management and thorough testing,” he says.

Another crucial factor, according to



– James Thomas, independent contractor for Novell SA

Thomas, is management and manageability. "The challenge you have in the Linux world with RPMs, which has become the default way of packaging updates, is that you don't have recursive dependency resolution. So, recursively, if one package needs another one, which in turn needs to get another package ... you as an administrator would have to resolve that," he says.

However, he reports that Novell has been hard at work since acquiring Ximian two years ago, adding functionality to that company's Red Carpet product specifically to address these challenges.

"What it does [now] is resolve all dependencies per server or desktop platform. In addition to doing software updates, the current release, version 7, includes policy lock-downs and remote controls based on security ... all the things that you'd expect to have under Windows."

Importantly, the product, now called ZENworks Linux Management, provides an effective tool for managing multiple distributions. "It provides a management framework and enables you to manage Windows and Linux in exactly the same way using the same tool," adds Thomas.

Stafford Masie, MD of Novell SA, explains further: "What Novell is doing is to wrap our competencies around corporate needs. By doing so we have created a delivery framework for Linux services based on best practices, such as ITIL, and corporate governance requirements."

He elaborates: "ZENworks is the technology fit for that business governance need. Evaluators of Linux always move on from the pleasant surprises the platform provides, to questions about management in an enterprise environment. Customers want all the benefits of OSS, but they also want it to 'feel' like a proprietary technology in terms of management and compatibility."

DIFFERENT STROKES

Meanwhile, the research indicates continued use of Linux for basic infrastructure tasks, high-performance computing and web-based applications. "BMI-T has observed increasing use of Linux as a platform for database and application server software (albeit a small portion of overall Linux usage)."

Thomas believes Linux is beginning to move into other areas but the comfortable spot is the data centre – especially with application and database vendors like IBM, Oracle and SAP supporting it. The biggest loser, he says, is Unix, which, as mentioned above, is borne out by the market research.

The underlying reason, he notes, is cost. "The problem with Unix is that it comes on a specific hardware platform that is prohibitively expensive. And, more importantly, the support and service agreements are equally costly, compared to Intel-based platforms."

Interestingly, Thomas believes it is only a matter of time before Microsoft begins to feel the pressure. "The performance and scalability [on identical hardware] of Linux is definitely superior to Windows servers," he opines.

Something else that BMI-T highlights is a relative shortage of migration services in the Linux ecosystem. "There are probably more people [at present] who can support and maintain the platform than there are, who can migrate from let's say Unix and/or Windows," concedes Thomas.

COMPETITIVE LANDSCAPE

You'd have to live in Outer Mongolia not to know that Microsoft is not taking the Linux threat lying down and, to quote BMI-T: "Microsoft is striking back but the move to GNU/Linux and free software is ongoing, long-lasting and irremediable."

"Microsoft will be more willing to offer

DATA CENTRE MOVES: James Thomas believes Linux is beginning to move into other areas but the comfortable spot is the data centre

photo: Cindy Ellis

CIO decisions

discounts to its most strategic clients on its licenses. This strategy will have an effect on migration from Windows to GNU/Linux. However, it will have its limits, in particular in the public sector for political reasons; a number of IT players such as Novell, Sun, Oracle and IBM have a vested interest in diminishing the power of Microsoft in the market," BMI-T notes in its report.

It also expects a number of large enterprises to move to GNU/Linux specifically to avoid being dependent on Microsoft. However, the analysts believe that mainstream, application-heavy Windows deployments

to Linux. Unfortunately, he wasn't able to provide more details – something that the more cynical Brainstorm readers might find amusing.

It is therefore worth pointing out that Masie is on record as saying on several occasions that he wants five big, wall-to-wall Linux implementations before he mentions any names. "Our focus is to make more people aware of the value proposition of Linux outside of the technology.

"This whole Linux/open source thing is not about technology – despite what the

"Customers want all the benefits of OSS, but they also want it to 'feel' like a proprietary technology."

– Stafford Masie

continue to be fairly well insulated from Linux due, in part, to the restricted and often confusing and conflicting information with regards ROI and TCO metrics and how they are applied to the specific implementation requirements.

Thomas is not quite so sure: "It could be due to TCO and ROI, but I think it's probably more down to the fact that when you start touching the desktop, you touch the most expensive part of the enterprise because the footprint is huge [and] the impact on productivity could be huge.

"To swap out servers in a data centre is a fairly contained environment and end-users may not even necessarily know that it has happened. Whereas on the desktop everyone knows it's happening and change management becomes critical," he adds.

Thomas says both IBM and Novell have customers that are switching desktop users

proprietary vendors are saying; it's about people and processes. Every IT manager knows that human aspect of IT is really where the costs really lie."

Novell, according to Masie, is addressing this in large corporates by looking at the people and processes and identifying the areas in which Linux will work quickly and with minimal disruption. "You need to categorise users by job function and role, factor in the processes associated with those users and figure out where Linux can play a role."

He concludes: "We are finding that in most of the organisations that we have engaged, at least 50 percent, usually more, of the users can migrate easily. As to the five major corporates, well, we're still on track with that but it's not something that can be done in a day."

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