

Chapter 10:

Moving forward----

Getting the best results from Open Source with your monopoly

In this chapter, there will be no more quotes from the original Halloween documents; hopefully we have already proven that the things that are working now are the same things we talked about doing 20 years ago.

Instead, we will look for ways to go forward from several of the ideas covered in previous chapters-- we will take points from each chapter and add an idea to each point. You are encouraged to do the same.

“Developers have less control and less reward for their invaluable contributions than any other point in software history.”

Our companies are still growing, and are forced to adapt to the landscape as each new form of competition presents itself. We knew the Web posed a serious threat, and we fought Java with notable success using the same tactics we are using against Linux. Other companies such as Google have also exploited Java, and it is not dead, but it did not realize the potential that posed so much threat to our model.

The record industry plays victim by talking about the well-being of artists, who are doing fine. The movie industry plays victim by talking about the guys in charge of lighting and editing. The software industry pretends to care about developers. Of course each industry rewards its serfs, otherwise people would be hard-pressed to explain what the point of the industry is. But for example, Microsoft's yearly growth from 2006 to 2019 is no sad story. We are still at it.

“Above all, the key strategy is not to destroy free software completely, but to break it in enough important places so that it poses less and less of a threat to your near-monopoly.”

We purchase and gut competitors whenever we can. Sometimes we go after a company as large as Red Hat or Nokia, but smaller acquisitions grow our IP and give us raw material to exploit for relatively cheap. Thomas Edison worked in the patent office, where people brought in half-baked, half-implemented ideas all day that were not patentable. He had the knowledge and experience to turn unmarketable and unfinished ideas into products. Very little of what we “innovate” is truly original. We transform useful things into products and IP.

“Marketing isn't just about highlighting the good points of what you sell-- it's about inventing reasons that people want and need your product, and then convincing people of those reasons.”

People don't need a good reason to buy our products. They only need a good-sounding reason. Certainly there is talent in leading people this way, but while free software types convince themselves that they should be ethical, we still have the advantage in making up reasons why everything we offer is better. A salesman does this on the storeroom floor, by improvising. We improvise too, but then test our made-up reasons with focus groups, to see what they will fall for.

*“A company's image is an important part of its brand, and you want an overall positive image no matter what... You **must look like you care**. And nobody knows more about fooling people into thinking you care, than your marketing team.”*

Remember to smile. Your smile should come out in your message, the people who are the face of your company, and in the image of your company. Also, when making up reasons that people need your products-- be sure to come up with many reasons that make your company look positive. They don't all have to be convincing. Don't just use creative spins on the truth to sell the products-- use it to sell the company to the customers and the tech press.

Make everything look like a giveaway, even when it is just bait.

“the important thing is that your brand and marketing outweigh anything said by critics.”

Being able to afford saturation in advertising and press coverage is your best friend. Get people in the company to speak for you-- get people in other companies to speak for you-- get your customers to speak for you.

*“find a way to focus on how the probably-unwanted or unneeded features are something the user **gains** rather than **loses** by choosing (or remaining stuck with) your product.”*

There are no unwanted features-- everything is an advantage (for us, if not for the customer.) You can tell people this all the time. They will find it difficult not to wonder if you really mean it, because you believe it yourself. That's one route to something almost indistinguishable from sincerity.

“people who feel like they're your friends will share more with you than people you treat like a competitor. “

This includes all the telemetry and handling of personal data that you exploit to reinforce your position in the market. The more people like your products, the more you can get away with.

“By working with hardware manufacturers and lawyers, you can help reinforce and update the rules that keep the world operating in a way that works for you.”

We still need more lobbying and more features in integrated chipsets that favor our companies over open source.

“Hardware and firmware make it possible to add unwanted features that the vast majority of free software users won't be able to simply uninstall and replace.”

In the future, we may want to get more involved in firmware and move more features from software to hardware. So far, we have mostly used firmware as a way to reinforce our place in the software market. Meanwhile Lenovo has used firmware to actually reinstall unwanted software, features and surveillance directly. We need to learn from Lenovo-- but as usual we need to make this look like a boon, not an attack.

“People are afraid to turn off features that sound as if they add security-- won't that make them less secure? Aha, Gotcha!”

Remember: there's *always* room for more features related to “security.”

Without “free hardware” (and we know that won't ever happen) the free software people are stuck reverse-engineering hardware and guessing how to write drivers based on trial-and-error.

Both in theory and in practice (USB, Android firmware) it is easier to attack hardware than software with patents, even if the patents are low-quality. We need to go after hardware more, to prevent free software users from leaving Intel (and their hooks) and becoming more independent.

Also what we failed to control in the server market, we need to work on controlling in server hardware, where we can be sure Intel retains monopoly power as it loses a small amount of ground to ARM and SBCs.

“always stress that to get the most of your hardware, you need industry software-- not cottage or basement software.”

We have typically focused on attacking larger Linux distributions, because we are best positioned to compete with them on our terms. As we gain tools to position ourselves with IOT and cloudware, it's about time to go after smaller, lower-power devices again as Microsoft did with CE and Apple did with iOS.

“When you have a monopoly... you can actually demand [features that favor your company] (or work out deals to get your way.)”

Our image as not just a ruthless industry powerhouse, but a company bridging together other industries with truly flexible and customizable solutions (which of course we will continue to drag people towards and away from again in endless, revenue-producing churn) is more positive now than in many years. We not only have a larger margin to play dirty with OEMs and the press (and customers) we have more plausibility than ever in scamming people to do things our way.

We will continue to make demands, but we are in a rare position to make even our demands and requirements look more like “offers” and “options.” Technically, when we “forced” OEMs with anti-competitive pricing, even that was an “offer” and an “option.” But that wasn't built on top of the stellar reputation we enjoy now.

“So long as you have relationships with OEMs you can exploit, you have the upper hand any time the free software devs want to run their software on popular consumer hardware. That translates to their reduced marketshare, wasted time for free software developers, and ultimately-- a well-guarded software monopoly.”

In the mobile market, the companies offering mobile platforms actually like having more control than their customers. iOS and Android have provided, we can still explore new deals with providers in countries where iOS and Android have farther from 100% saturation in the market.

Consumer network appliances have not done as well as IOT with focus groups or sales, as network appliances lost ground to mobile. Though we can still explore SmartTVs, Smarthome devices and we rarely do with automotive. We need to work more with OEMs for all of these relatively new device categories-- not just the PC.

The point isn't to keep them out entirely. It's to be sure it takes them so long to get in, that by the time they've supported the hardware it is already obsolete.

Being first is a lot like being only. We need to avoid being second in new markets.

“Leasing the use of your company's intellectual property is the core of your software business-- you need to protect that property to maintain control of your customer base.”

Instead of just selling IP, we can sell developer access. Of course we will still sell IP, but we have a new market to exploit (and the latest acquisitions are already helping.) People forget that we own multiple developer and business networks now. We can offer premium advantages within those networks-- selling and reselling access, as well as aggregate/business intelligence data we did not previously own. We can maintain control of not only our customer base, but our competitors also.

*“instead of fighting to prove that something is ours, we have it in writing-- so when we **stop bothering with their licenses and terms** and co-opt the software in whatever way we choose, how are they going to stop us? We have an agreement! Even the largest Linux-based companies said this is ours! Who's going to argue then-- the little student coders that work for them?”*

We need to start gradually explaining to people that we own these things. This has to be done slowly, because done too early or too quickly it will hurt our ability to exploit our allies in Open source. We can afford to take risks now, but not to be reckless.

Now that we have convinced the companies that we own their software, we need to convince the users. If we handle this slowly and with care and close monitoring of progress, they can't stop us from convincing the world that these things belong more to us than anybody-- we can turn their offerings into our next semi-exclusive platform, our brand, our control over details.

“And if somehow the lawyers have nothing else to do-- you can always lobby to make new laws, for your legal team to exploit.”

“The important thing is that they're working for us-- and on our terms.”

We may need to preempt some GDPR-like regulations in the United States with neutered versions of the same, drafted by our own lobbyists. This will also help improve our image.

Look how well Mozilla can ramble about new privacy features all day and still drag their users through scandal after reputation-destroying scandal-- and look like they still care about users.

“Without control, there is chaos. Even when a competing developer makes a terrible mistake-- it hurts people's trust in the digital connectivity and surveillance we want to put in every home”

We need a new campaign sort of like “better with Windows” but for “trust,” as long as we are doing more with Open source. We need people to know they can trust our “open source” more than theirs for certain applications. This needs to be more subtle than previous campaigns like it, because of our place in the middle of open source development-- not the outskirts like before.

“If we want to sell the internet of things, we can't have people thinking that a bunch of amateurs are creating their software-- we want them to know that everything is under control.”

Trust and security and surveillance will be the hallmarks of our IOT strategy. People think they don't like surveillance, but they do want security. Just as people will put Wi-Fi cameras in their own homes only to have them hacked and used against them, we need to sell our surveillance by making it look less like our technology, and more like their own. But we also need to remind people that our brand can be trusted more than these no-name baby monitor companies.

“Over the years, we have had great success getting people to accept subscriptions instead of purchases”

“A lot of people think that a subscription model is just about charging people over and over again for something they already bought legally. ..but there is a more important angle-- we basically “own” (at least control) every machine that uses this model.”

We have developer licenses that give enormous options under what is basically a subscription model. We should create a new tier of subscription that lets customers do more business with us-- not a complete subscription to everything, but a higher-tier “user subscription” akin to a season pass for more of our products.

We are not making full use of the subscription model yet, but we have proven that it works.

“this is one more reason that we don't want software to be free and controlled by the user: if the user controls their files and programs, they can also copy media that the film industry and e-book publishers want to control after purchase.”

“By allying with the media companies and major publishers, we have an additional source of revenue that not only gives us an industry we can first tap into and then gradually become its vendors”

When are we going to get more into streaming, like hulu and netflix and youtube?

“we do it with guilt trips, with lobbying and public-service-like advertising, and (though it's a subject for a later chapter) by working with schools to indoctrinate students with our pro-monopoly point of view.”

We (always) need more opportunities for education that involve our products. Obviously BillandM are working on the usual school takeover, but we also need our own training centers or tutoring centers-- at least a pilot program.

“if your intention is to lead customers by the nose, then you don't just want to come of as self-righteous. You want to actually make the people who differ from you look like worse people.”

“you're doing it to protect the customers themselves.”

So far we have done very little to attack people for not giving us as many chances as other companies. We have Torvalds calling that “hate” though we are pulling so many punches about exclusion these days. We can push this a bit harder.

We can protect customers from so much more than lousy software from competitors. We can protect customers from the bigots in the freedom brigade.

*“With a little finesse, we can also feed the customer's fear of not getting enough-- to make them afraid of being “ripped off” if they don't pay anything. We want to take people who think they want to get something for free, and convince them to **associate value with spending**-- not saving-- their money.”*

We can also explore the freemium model being used in the mobile app market. We should do this with application features, not miniature apps like the failed Metro nonsense. That was nothing but “Active Desktop”/IE4 all over again. People still want real applications.

“The internet allows us to focus more exclusively on the advantages of our products over free “competitors,” and outsource our attacks to fans and useful third parties.”

Considering that we have things like GitHub, we can play this up even more. We can also use it to introduce more advertising, as Microsoft did with Windows 10. We are pushing more advertising of products into Debian, Ubuntu, and open source outlets like Phoronix. Nothing is stopping us any longer in our new home.

“People will always point out that this is cynical. It doesn't really matter, because this 'cynical' point of view is what continues to drive consumers to spend and overspend, year after year.”

We can probably do a little more to paint our critics as cynical-- or encourage them to be more open.

“We can control updates; we don't really care who pirates the 'starter pack' for our platform anymore, because we can monitor and update and deactivate whatever parts of the platform we want pirates to have or not have.”

Windows 10 was helped when we made it a free upgrade for a limited time. We could try that with some other things-- we could start diluting the term “free” a bit more, now that “open” just means “with Microsoft and Apple.”

“As long as our proprietary and commercial offerings have more perceived value than the free counterparts, we can point out that these charities could do more for people by raising additional funds to send higher quality commercial software to the people they want to help”

Nothing to add to this, really. What are BillandM doing in this regard? What about Apple?

“If we involve ourselves just the right amount in open source, we can use it as a platform to upsell customers to whatever products we want them to purchase.”

“By accentuating the positive and outsourcing our attacks on the competition to sympathetic third parties, we can help people to remember that it's silly to settle for less.”

“do you want the free version, or the great version? It's your choice.”

Experience a free trial/free tier of our cloudware subscription. You're going to fall in love and want more features!

“when we send press releases or hire copywriters, we can throw our values into the conversation and remind people why everything is better when our tools are included

Even when this isn't true, the tech press has taken our side again and again. We can even push journalists-- just like Microsoft did to push OEMs to cooperate-- to lean favorably or lose our participation and cooperation.”

Special deals for Instagram / social media influencers? Sell “access--” bundled.

“they keep telling themselves that writers write their own stories. Sure they do-- from whatever they glean from our press releases, press events, and corporate evangelists.”

“No matter where you go, you're going to hear how great we are.”

We can teach more people in social media how to get readers by repackaging our message.

“A superior product is like a politician's speech-- the best way to sell a lie is to put a truth in it, so people assume the rest of it is also the truth. And when you want to sell a new product you can do the same thing: start with a feature people are desperate to have, and you can build a lot of garbage around it as long as the important features are satisfying enough.”

What are the features people don't have that we can build new products on?

“We also need a 'path forward' to our products. Whenever we outline our strategies to feed to our skills and the tech press, they need to paint free software and its authors as true gems-- from a bygone era.”

“The future is (always) us, and the products we want people to use.”

Every one of our products should be viewed as an “upgrade” to whatever else people are using.

“The lead developer is free to do basically whatever they want-- keeping a project true to its roots.”

We need to keep fighting software stability or consistency by portraying it as selfishness and being close-minded, old-fashioned, uneducated, and uninformed.

“If their personality is not to the liking of other developers, it doesn't necessarily matter-- they don't have to join and the lead developer doesn't have to invite anybody. This works for many projects of small to medium size.”

There is no room for impolite or unattractive developers. We should work to get rid of them entirely.

“You can be the leader of your own project and do what you want to with it, but now you shouldn't-- every project should have a community, a code of conduct...”

And we should host it.

“Open source continues to pave the way forward for monopolies to own and direct free software-- which was originally created to be independent of control by monopolies.”

Fortunately, most people don't care about history lesson that would put our rewriting of it into perspective. That was old, this is new, and so on.

“Free software developers seem to care very little about this, because they have their stripped free software versions of everything open source. So what if we make things less modular, more brittle, more bloated, and more poorly designed? They only use projects with a license allows them to clean up after us, so they're content no matter what we sabotage.”

They view this completely differently. Open source says that we have changed where we havent-- we just keep getting better. Free software says that we havent changed where we have-- we can just keep getting worse, and they won't notice.

“We can overwhelm them and send them to clean up mess after mess, with the remaining effect of steering key projects to work more the way we want, and them accepting our changes.”

Are there any tools they rely on that we aren't already “contributing” to in some way?

“In exchange for software with more churn, more bloat, less choice and less user control and reliability-- they get “cooler” software tools, larger sponsorships, bigger marketing and events that feature their software-- everything they would enjoy if we took over their world and did things our way. And we still get royalties and the chance to steer development away from things that help our competitors more than they help us.”

Maybe we can go further and have pages where they can donate...

“We de-commoditize protocols. We add features we want and deprecate ones that people rely on, and we tell them to get with the program. We create the same kind of lock-in (in practice) by decreasing the compatibility with trusted development tools and utilities, so we can move more quickly (and drag users along) from one industry fad to another.”

We could probably use more foothold in the maker/3D printing communities.

“We say this leads to more compatibility-- but it's more compatibility with the things we care about, and less compatibility among the free software ecosystem they created for themselves. Essentially we drag them out of their world, and back into ours.”

“Recently, a company used Wikipedia servers as a blank canvas for their own corporate advertising and message. They were called “bastards” and “vandals” and their changes were reverted.”

“It's quite different in the world of Free and Open source software. We can behave exactly like The North Face, do just as much to vandalize and be bastardly, we can even stake claim to their work (and have them agree it is our own!) and become wealthier and gain a heroic reputation in the process.”

“Apple was once a small company taking on giants from a garage, and often cares little about compatibility with industry standards. It has used the image of being 'different' and rebellious to justify overpriced, more proprietary components in its products.”

“Microsoft, more than Apple, has worked on its reputation of being ruthless and having unfair practices that hurt the computer industry on several different levels.”

“While spying on users and selling their data mined by artificial intelligence and unscrupulous third parties, Facebook continues to work to make itself look like a philanthropic organization.”

“Like with these other companies, the real power is the power they have over the industry and the users of their products. But their brand is about the smaller amount of power they 'share' with users.”

“The goal for those fighting against Open source, against the true openness (let's call it the yet unexploited opportunities) of Open source, has to be first to figuratively own the Linux brand, then literally own or destroy the brand, then to move the public awareness of the Linux brand to something like Azure, or whatever IBM is going to do with Red Hat.”

“Someday, Linux will be no more-- we said in those Halloween memos that it's just a kernel, but by making it into an Operating System we managed to make it stand for less, while making it look like more than it is. “

“the gradual shift in public consciousness from their branding towards our own, is the next best thing to owning them outright.”

Look at everything we said we wanted to do. Look at all we've managed from our list. *If we had even tried to follow a 20-year plan, it didn't come out too badly.*

Here's to the next 20 years!

About the author:

Ted MacReilly is a technologist and tech writer concerned with modern trends in software design and development. He does not work for Microsoft, Apple, or Google, but would like them to continue offering proprietary software and cloudware, without getting too cozy with free software developers.

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