Chapter 5:

Open Source Judo--
How to bribe the moderates to your side

In 1999, Bruce Perens left the Open Source Initiative that he co-founded with Eric S. Raymond. In his letter to the community, he explained:

"Open Source has de-emphasized the importance of the freedoms involved in Free Software."

He continued: "One of the unfortunate things about Open Source is that it overshadowed the Free Software Foundation's efforts. This was never fair - although some disapprove of Richard Stallman's rhetoric and disagree with his belief that _all_ software should be free, the Open Source Definition is entirely compatible with the Free Software Foundation's goals, and a schism between the two groups should never have been allowed to develop."

This schism is ripe for exploitation. As mentioned in the previous chapter: "we can stir contention between 'open' and 'free' and get open source to defend our model..." Getting fans and amateurs to first fight our battles for us, and then blame the very people they're attacking for disagreeing with them-- is an important step and makes open source an unlikely if valuable ally.

Since no one involved with open source is stupid enough to think they can change the minds of hardened free software zealots, it seems obvious they only use rhetoric to make themselves look like the more reasonable option and to gain the hearts and minds of people who are still on the fence. Those are the same people we want to bring to our side.

Nonetheless, this is an industry. The ideal would be to have industry people on our side. And just as crime glues people to the nightly news, the drama between open source and software idealists gets people reading about whatever open source has to say this week.

The tech press loves open source, because it has greater affinity for the industry the press represents. If you love this business as much as we do, you quickly get tired of all the self-righteous whining of nerds and long for the can-do, easygoing and corporate-positive attitude of open source geeks. They might not appreciate an irreparable, proprietary kernel as much as we do-- but they understand that not all improvements are free or open. These are people we can work with. And if we can work with them, we can take advantage of them.

Proprietary software has to be marketable, and immediately this gives us an advantage with people who want to write about it-- our titles are more fun to cover, lead to more interesting stories and more interesting headlines.

Moreover, 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-- we can take anything and use our market research and our clout (and leverage) with other companies to create a product ten times better than free software can hope to compete with.

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. Time is money; in journalism, doubly so. But without our help, the tech press often doesn't get their story as fast. Just as we can do more favorable business with OEMs, forcing them to dance for us-- the same game works with journalists.

If an author becomes too critical, we can drop them-- stop handing them stories, and even use their employers against them (favoring another publisher entirely, until they learn from their mistake.) Apple has done this in the past, and their national-security-like commitment to security under Steve Jobs meant that journalists who wanted a story had little hope of getting it without staying loyal to Apple Inc.

But it can't be said enough times, that just like with everything else (customers, competitors, partners, even open source itself) that our relationship with journalists should be friendly on the surface-- and appear friendly as a rule. Even as we subtly threaten writers not to push too hard or they will fall out of favor, we need to smile and tell them "Look, we aren't here to tell you what to do. You have a business-- we have a business. We just want to be sure that what you write is good for both of us." They'll get the picture. The vast majority of them always do, and the people who pay them always do.

Open source provides us many new opportunities to make these exchanges and representation in the press look more organic and less staged. The endless, cloying premise of making everything "more open" is the perfect trojan horse for delivering more of our exclusive products to an audience that thinks that it is seriously changing the way we do business.

And they're right, on the surface-- we have changed to make full use of their model, their rhetoric, their vague pseudopolitical nonsense designed to market freedom from our monopolies, to our monopolies. Two decades or more into this dance, we still use the same playbook and we still do it with a smile and thinly-veiled displays of our power.

If they doubt our friendship, we can help them make money in the process. Why not? They help our business. We are in this for control, just as much as money-- we pretend to share control through carefully meted partnerships, but the value

we generate is sustained by our position staying on top. As long as we remain powerful, we have our budget for advertising, our budget for lobbying, our budget for bribing-- not that we need to call it that.

Big business means going to lunch, hosting dinners, sending out promotional items, and so on. We bribe customers with special deals, we bribe journalists with meals and events and parties, we like to treat our friends well-- even if later we make it clear what the terms of treating us well are in turn.

It's not "bribery" if we don't put the two together. The ultimate hallmark of discretion is that if we pay you to act the way we want you to-- even you won't notice. So we dance around the margins of what is ethically and legally acceptable, and just like we do with consumer rights-- sometimes the dance gets a little wild and risky. Business is about taking chances, and if we go too far, we just pull back. Don't forget that the entire point of this dance is to be treated favorably by the same people who would call us on our behavior. As long as we have enough of them, the rest wont matter.

And if our companies can actually purchase and literally own some of the corporations that talk about us-- well, most people don't care about that. After all, 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.

We don't just have the tech press treating us kindly-- we have the organizations they interview where we want them, and even the other people the tech press gets their information from. No matter where you go, you're going to hear how great we are.

That's the power of the press-- *our* press. All we ever really have to do, is figure out what we want people to hear.

Relevant quotes from the Halloween documents:

"It's a handful of amateurs, most of us unpaid and almost all part-time, against an entrenched multimillion-dollar propaganda machine run by some of the top specialists in the technology-marketing business."

From https://antitrust.slated.org/halloween/halloween1.html

"Shall I go to the town of Nottingham, Linus, and with smooth words recruit the gossips and trade press to our cause?"

"Why don't we write software so complicated and protocols so obscure and undocumented that only we can figure them out?"

"Yes! Then we will use our superior marketing forces to cram them down everyone's throat, and neither Linus's outlaws nor any other competition will be able to get a toehold in any IT shop anywhere, ever again!"

"Exactly, master. I call it de-commoditizing."

"Various press shills and Microsoft lackeys, alerted, begin pointing fingers at Linus and his little band."

"those hippies will never build anything really complicated or difficult!"

     From https://antitrust.slated.org/halloween/halloween4.html

"We also get some whining about 'lack of fairness in media coverage,' which appears to be Microsoft-speak for 'the trade press isn't behaving like our poodles anymore.'"

     From https://antitrust.slated.org/halloween/halloween5.html

"Microsoft has never been famous for reluctance to tell lies when that suits corporate purposes."

     From https://antitrust.slated.org/halloween/halloween5.html

"Microsoft has been trying to sandbag Linux with supposedly 'objective' studies by third parties that turn out to have been bought and paid for by the boys in Redmond."

"Microsoft got the benchmark results it wanted – only to be embarrassed when it came out that Mindcraft had apparently run them on Microsoft-supplied machines, at a Microsoft site, with the benevolent assistance of Microsoft technicians tuning both Windows and (even more helpfully) Linux – and then neglected to mention in its press release that Microsoft had paid for and hosted the whole exercise."

"This time, its date for the dance was a respected name in IT forecasting, the Gartner Group."

"Sometime before 6 October, the Gartner Group published on its central corporate website, www.gartner.com, a series of five reports slamming Linux and predicting that its appeal would fade once the inevitable Service Pack 1 for Windows 2000 came out. These reports quickly spawned Linux-is-doomed articles like this example from 15 Oct on the IDG Australia website, which promoted them as objective studies by independent Gartner."

"On 19 October Gartner changed the copyright on the reports to no longer mention Microsoft, while publicly insisting that the research had not been funded by Microsoft."

From https://antitrust.slated.org/halloween/halloween6.html

"Provide detail on the writer and their media who are writing the story, i.e. are they technical, political, sensational"

From https://antitrust.slated.org/halloween/halloween8.html

"since Microsoft hired Mindcraft to discredit Linux."

From https://antitrust.slated.org/halloween/halloween9.html

"I also expect a serious effort, backed by several billion dollars in bribe money (oops, excuse me, campaign contributions), to get open-source software outlawed on some kind of theory that it aids terrorists."

"We need to make the cost of suppressing us higher than the sixty billion dollars Microsoft can afford to pay."

From https://antitrust.slated.org/halloween/halloween11.html

"For close on twenty years I have watched Microsoft peddle inferior technology with slick marketing, destroy competitors with dirty tricks, and buy its way out of trouble."

From https://antitrust.slated.org/halloween/faq.html

"Sleazy behavior, covered by utterly brilliant marketing, has been a pattern in Microsoft's business practices since they were a garage outfit"

From http://www.catb.org/~esr/not-the-osi/halloween-rant.html

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.