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Advanced Operating Systems

#1

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Course Plan

- Multi-core Resource Management
- Many-core Resource Management
- GPU Resource Management
- Virtual Machines
- Distributed File Systems
- High-performance Networking
- Memory Management
- Network on a Chip
- Embedded Real-time OS
- Device Drivers
- Linux Kernel

Schedule

- 1. 2018.9.28 Introduction + Linux Kernel (Kato)
- 2. 2018.10.5 Linux Kernel (Chishiro)
- 3. 2018.10.12 Linux Kernel (Kato)
- 4. 2018.10.19 Linux Kernel (Kato)
- 5. 2018.10.26 Linux Kernel (Kato)
- 6. 2018.11.2 Advanced Research (Chishiro)
- 7. 2018.11.9 Advanced Research (Chishiro)
- 8. 2018.11.16 (No Class)
- 9. 2018.11.23 (Holiday)
- 10. 2018.11.30 Advanced Research (Kato)
- 11. 2018.12.7 Advanced Research (Kato)
- 12. 2018.12.14 Advanced Research (Chishiro)
- 13. 2018.12.21 Linux Kernel
- 14. 2019.1.11 Linux Kernel
- 15. 2019.1.18 (No Class)
- 16. 2019.1.25 (No Class)

Introduction

Generalities of the operating system

/* The case for Linux */

Acknowledgement:

Prof. Pierre Olivier, ECE 4984, Linux Kernel Programming, Virginia Tech

Im doing a (free) operating system (just a hobby, wont be big and professional like gnu) for 386(486) AT clones.

Linus Torvalds 08-25-1991

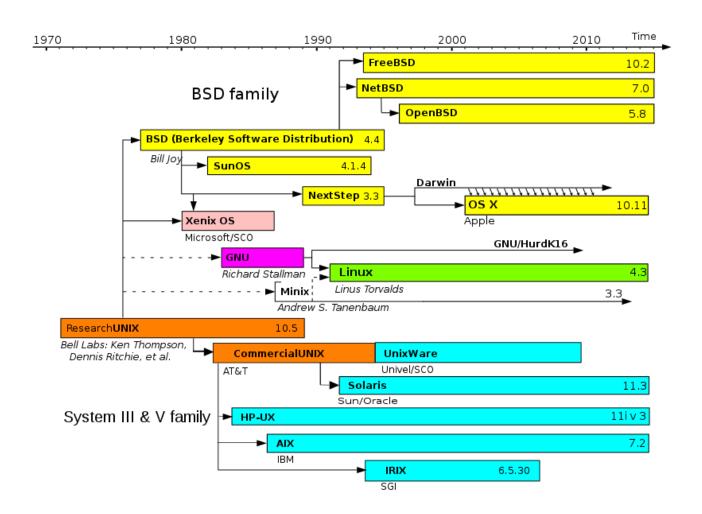
Outline

- 1 A bit of history
- 2 Linux usage today
- 3 Linux open source model & the community
- 4 Global overview of the kernel
- 5 Kernel debugging (Qemu)
- 6 System calls

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The Unix OS family



Source: [9]

The popularity of Unix

- Unix is very popular and ported to multiple architectures
 - This is due to its simple design and ease of use

Simplicity:

- Small number of system calls with clearly defined design
- Everything is a file
- Written in C for portability
- Easy and fast process creation (fork())
- Simple and efficient Inter-Process Communication mechanisms (IPC)

Enters Linux

```
From: torvalds@klaava.Helsinki.FI (Linus Benedict Torvalds)
   Newsgroups: comp.os.minix
   Subject: What would you like to see most in minix?
   Summary: small poll for my new operating system
   Message-ID: <1991Aug25.205708.9541@klaava.Helsinki.FI>
   Date: 25 Aug 91 20:57:08 GMT
   Organization: University of Helsinki
8
   Hello everybody out there using minix
   I'm doing a (free) operating system (just a hobby, won't be big and
   professional like qnu) for 386(486) AT clones. This has been brewing
   since april, and is starting to get ready. I'd like any feedback on
   things people like/dislike in minix, as my OS resembles it somewhat
   (same physical layout of the file-system (due to practical reasons)
   among other things).
17
   I've currently ported bash (1.08) and qcc(1.40), and things seem to work.
   This implies that I'll get something practical within a few months, and
   Id like to know what features most people would want. Any suggestions
   are welcome, but I won't promise I'll implement them
21
22
   Linus (torvalds@kruuna.helsinki.fi)
24
               it's free of any minix code, and it has a multi-threaded fs.
   PS. Yes
   It is NOT protable (uses 386 task switching etc), and it probably never
   will support anything other than AT-harddisks, as that's all I have :-(.
```

Enters Linux (2)

- > 1991: First apparition, author: Linus Torvalds
- > 1992: GPL License, first Linux distributions
- > 1994: Linux v1.0 Single CPU for i386, then quickly ported to Alpha, Sparc, Mips architectures
- > 1996: v2.0 Symmetric multiprocessing (SMP) support
- > 1999: v2.2 Big Kernel Lock removed
- 2001: v2.4 USB, later: RAID, Bluetooth, etc.
- 2003: v2.6 Lots of features: Physical Address Expansion (PAE), new architectures, new file systems, etc.
- 2011: v3.0 "Nothing" [1]
- 2015: v4.0 Livepatch, Kernel Address Space Sanitizer (KASAN)
- For Today stable version: <u>Let's check it out → www.kernel.org</u>

Sources: [10, 5]

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A Few Numbers

Linux usage in today's computer systems landscape

Embedded systems

- Smartphones, tablets, etc.:65% market share (Android)
 - vs iOS (24%)
- Embedded systems in general: 29% (Android, embedded Linux solutions)



Servers

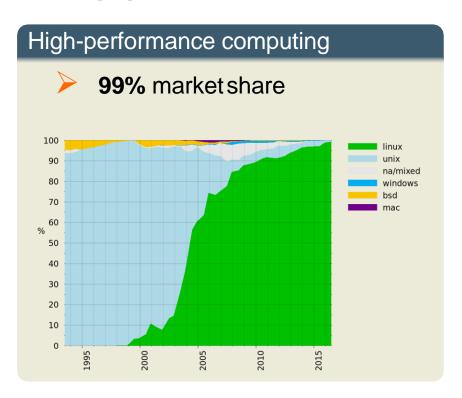
- 36% market share (top 10M web servers)
 - vs other Unix-like OS (30%) and Windows (30%)
- 98% (top 1M)

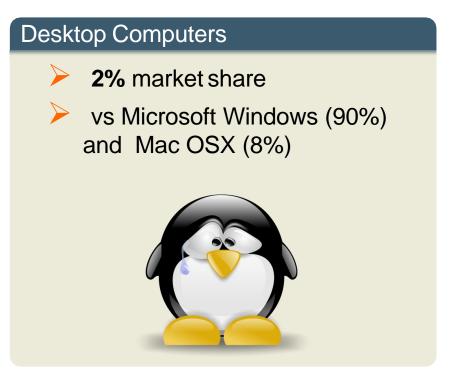
Source: [11]

A Few Numbers (2)

Linux usage in today's computer systems landscape

Source: [11]





Indisputably one of the most popular operating systems over the whole spectrum of today's computer systems

Jobs & Linux

- Linux Jobs Report released by the Linux foundation in 2014 [3] and 2015 [4]
 - > 1000+ hiring managers polled as well as 3400+ Linux professionals
 - From large corporations to medium/small businesses, and government organizations
- 97% of the managers report they will hire Linux talent in the next six month
 - Up from 46% in 2014
- 86% of Linux professionals report knowing Linux has given them more career opportunities
 - 64% says they chose to work with Linux because it is pervasive

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Linux open source model

- Linux is licensed under GPLv2
 - Sources are freely available (https://www.kernel.org/)

Quick summary of the license terms:

You may copy, distribute and modify the software as long as you track changes/dates in source files. Any modifications to a software including (via compiler) GPL-licensed code must also be made available under the GPL along with build & install instructions.

https://tldrlegal.com/license/gnu-general-public-license-v2

- Third party can distribute modules as proprietary binaries
 - Compliance with GPLv2 is still an outstanding question, but Linus allows this

Linux open source model (2)

Benefits from the open source model

Benefits of open source vs closed development:

- Security, stability: Given enough eyeballs, all bugs are shallow [12]
 - Not a panacea though (OpenSSL Heartbleed, Bash Shellshock, etc.)
- Code quality
- Freely modifiable by anyone having an interest to do so
 - Hardware and systems vendors, distributors, end users
 - Enable innovation!
- Education, research
 - That's us!
 - We can PEEK at the code to understand how it works
 - And we can POKE it to experiment and build new systems

The Linux community

- Developers:
 - Anybody can propose modifications (patches)
 - Patches posted on mailing lists
 - Reviewed and commented by the subscribers
 - Then by kernel maintainers
 - More info here: [7]
 - Most of Linux contributors are actually employed by companies producing hardware (ex: Intel), systems (ex: Google), or doing consulting (ex: Red Hat)
- Linux foundation [2]
- Conventions & Symposiums
- Software ecosystem very few examples:

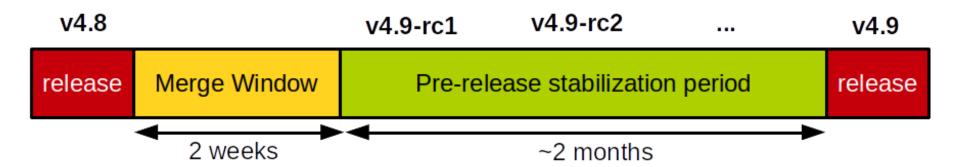




Linux open source model & the community

Kernel version numbering system

- <major>.<minor>.<stable>
 - > ex: 4.8.17

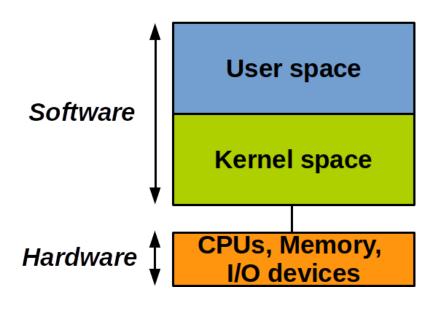


- > Stable version numbers (bugs fixes) are added after release
- Long Term Support for a subset of releases:
 - Ex: 4.4.43 or 3.2.84 vs 4.8.17 [EOL]

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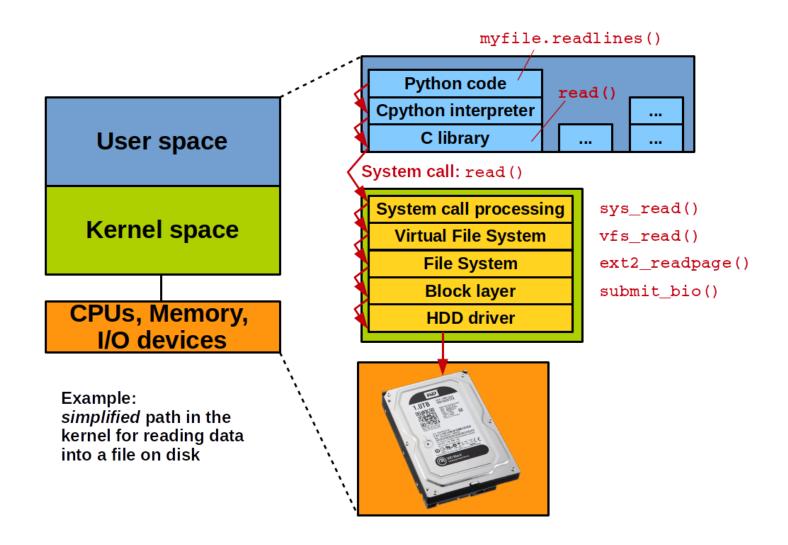
User vs Kernel space



- At any given moment a CPU is executing in user or in kernel mode
- Only the kernel is allowed to perform privileged operations and access I/O devices



User vs Kernel space (2)



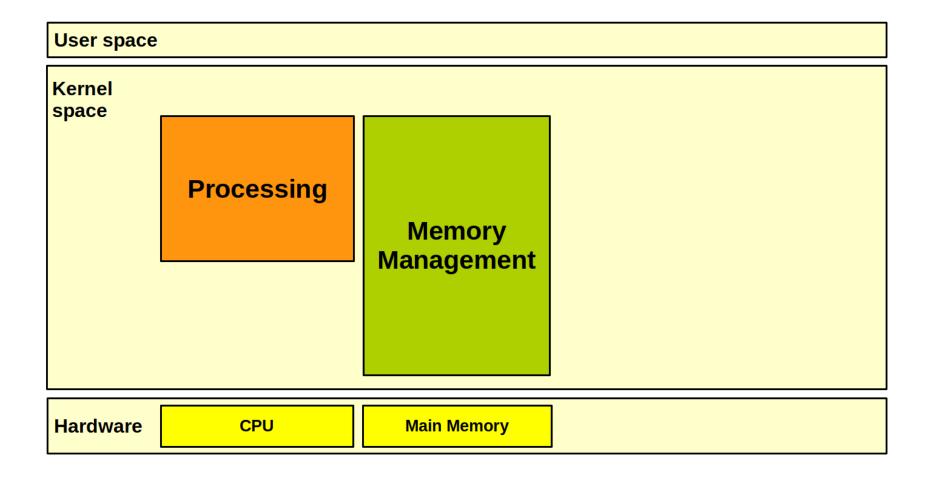
Monolithic Model

- Linux is monolithic
 - All the OS services run in kernel, privileged mode
 - In the same address space
- Opposed to the microkernel model:
 - Only the core services run in full privileged mode
 - Scheduling, interrupt handling, etc.
 - Other services run with reduced privileged in their own address space
 - Communication through message passing
 - Ex: Minix, L4, etc.
 - More secure and modular, but communication brings performance down
 - See the Tanenbaum-Torvalds Debate [8]
 - Other classes of OS: Exokernel, MultiKernel, etc.

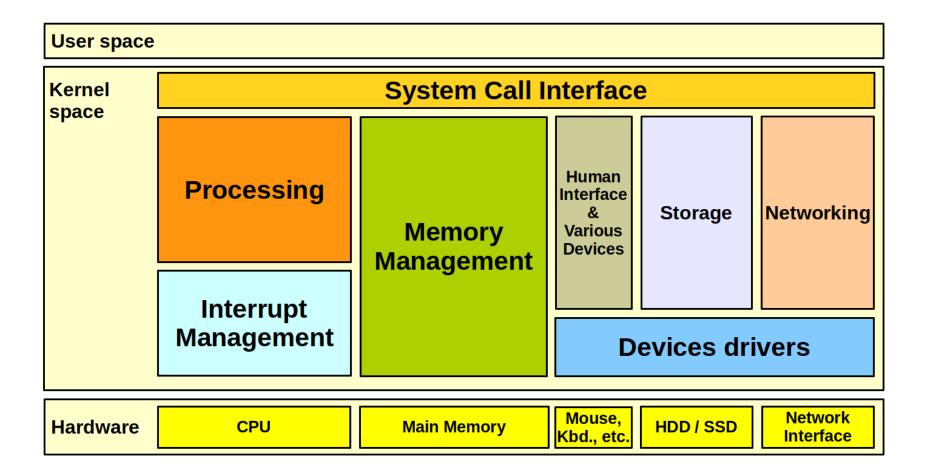
Kernel vs user level programming

- No C library mostly because of speed and size
 - However, the kernel implements lots of usefull functions from the C library
 - Ex: strcat, vmalloc, ssleep, etc.
 - \triangleright printf \rightarrow printk
- 2% assembly, the rest in GNU C
 - GCC extensions
- No memory protection
- Highly concurrent
 - Preemption, interrupts, running on SMP
 - Race conditions without proper synchronization

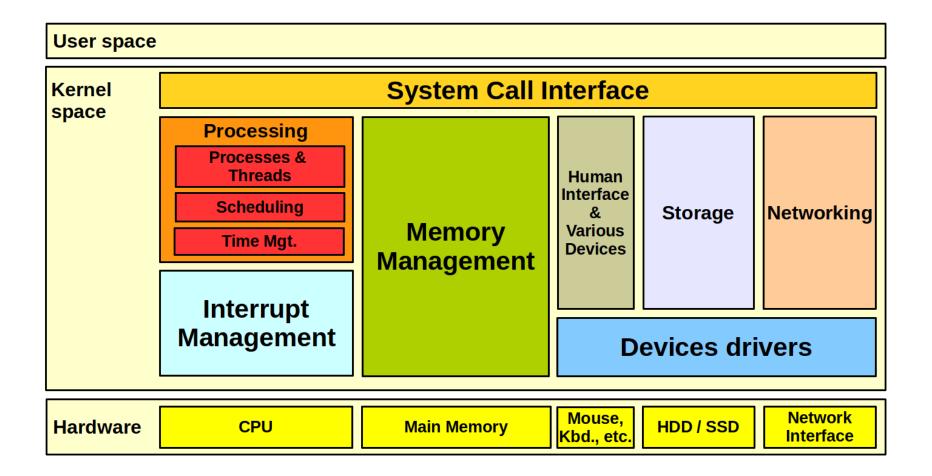
Kernel & course map



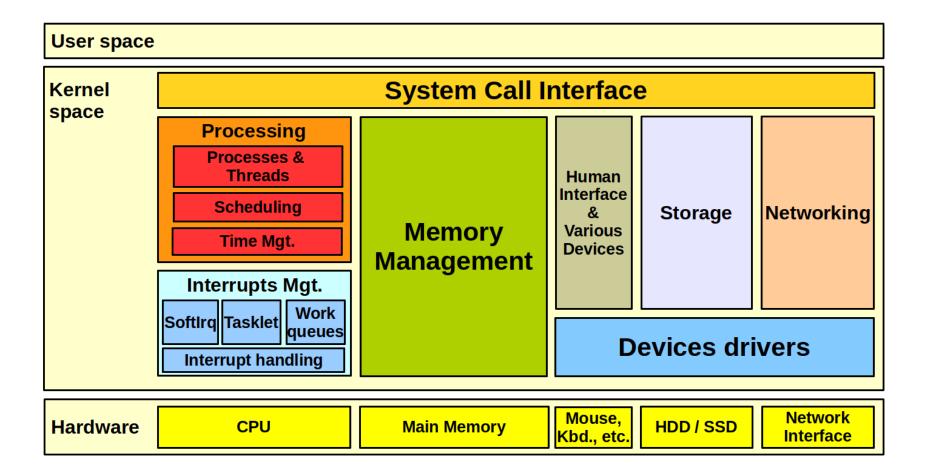
Kernel & course map



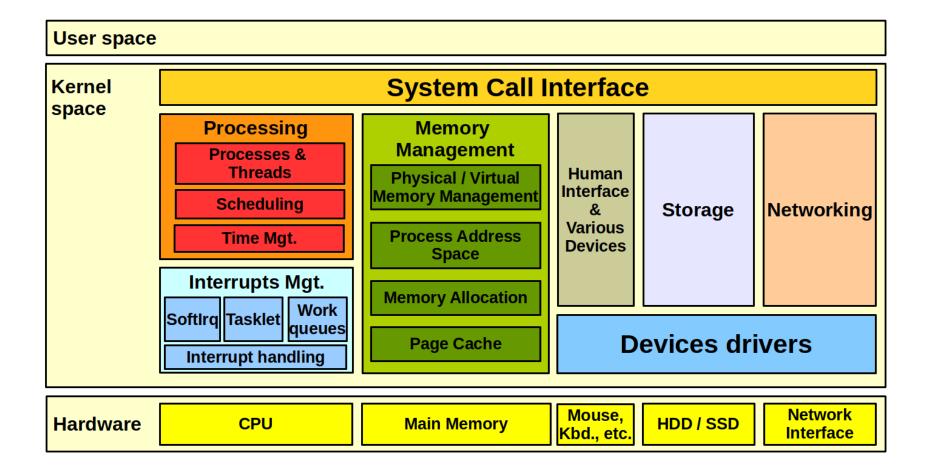
Kernel & course map



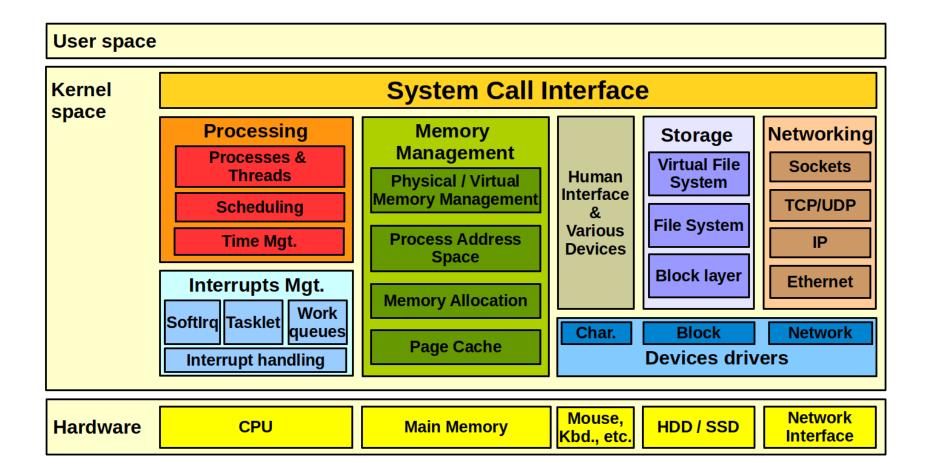
Kernel & course map



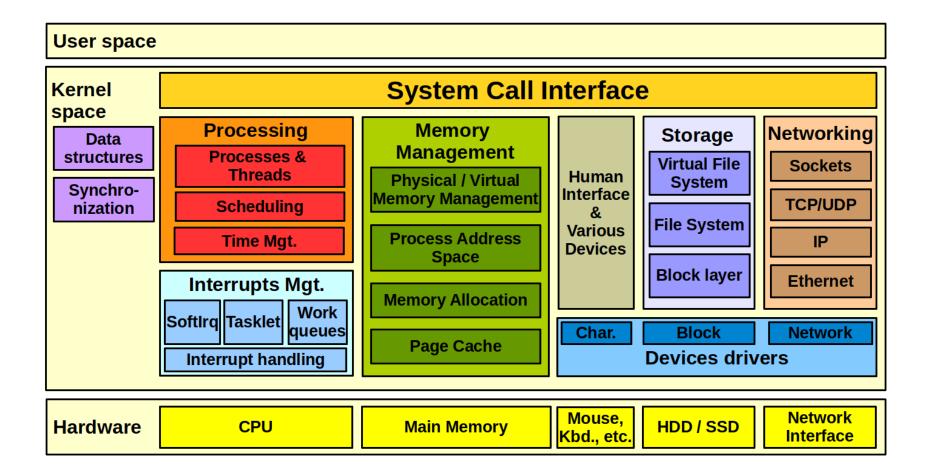
Kernel & course map



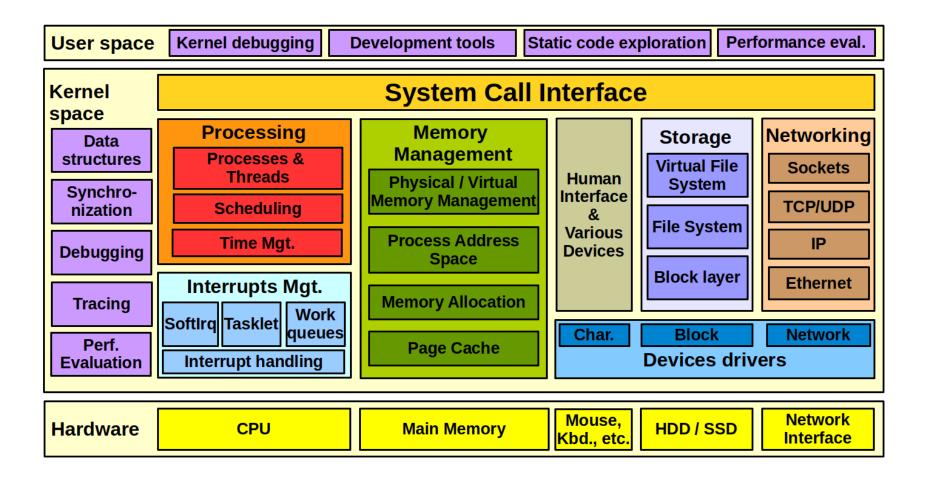
Kernel & course map



Kernel & course map



Kernel & course map



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Qemu quick presentation

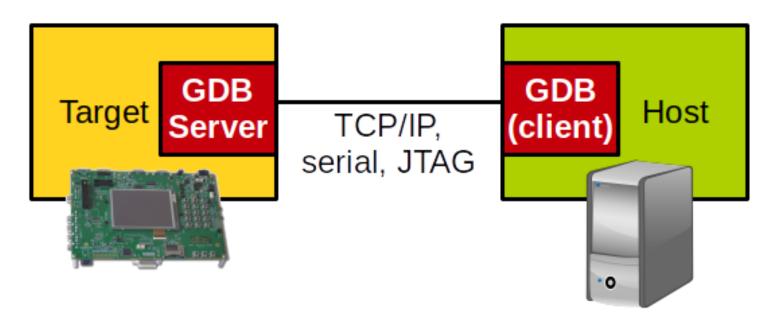
- Full system emulator: emulates an entire virtual machine
 - Using a software model for the CPU, memory, devices
 - Emulation is slow
- Can also be used in conjunction with hardware virtualization extensions to provide high performance virtualization
 - > KVM
 - In-kernel support for virtualization + extensions to Qemu

Qemu and kernel development

GDB server

GDB server

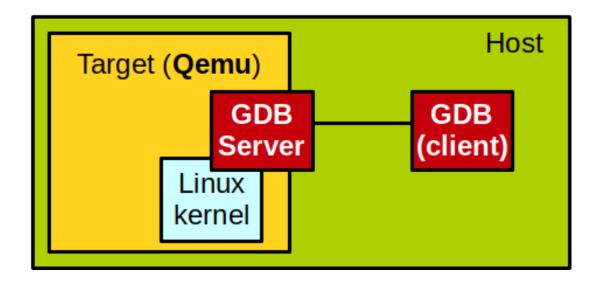
- Originally used to debug a program executing on a remote machine
- For example when GDB is not available on that remote machine
 - Ex: low performance embedded systems



Qemu and kernel development

Qemu & GDB sever

- Qemu is capable of running a kernel in an emulated machine with an associated root file system ...
- ... and act as a GDB server for the kernel itself



Qemu and kernel development

Qemu & GDB server: benefits

- Benefits:
 - Debugging
 - 2 Runtime code exploration

Using Qemu and GDB server

Requirements

- Requirements:
 - Linux should be compiled with debug symbols:
 - make menuconfig Kernel hacking Compile the kernel with debug info (old kernels)
 - make menuconfig Kernel hacking
 Compile-time checks and compiler options Compile the kernel with debug info
 - Qemu options:
 - -kernel path/to/bzImage: path to the bzImage of the kernel we want to execute and debug
 - -s: enable the GDB server
 - -s: (optional): pause on the first kernel instruction waiting for a GDB client connection order to continue
 - Usage (client side):

```
1 gdb path/to/vmlinux
2 (gdb) target remote:1234
```

Using Qemu and GDB server

Requirements (2)

GDB usage:

http://www.dirac.org/linux/gdb/

Remote GDB bug on 64 bits

- Firor when connecting to the remote target: Remote 'g' packet reply is too long
 - You need to patch GDB (client)
 - Patch for old versions of GDB sources:

```
http://www.cygwin.
03/msg00116.html
com/ml/gdb-patches/2012-
```

- Last version (7.11+):
 https://github.com/olivierpierre/gdb-remote-patch
- Compiling GDB:
 - ¹ Grab the sources:
 - https://www.sourceware.org/gdb/download/
 - Patch it using patch -p1 < patch-name.patch

```
1 ./configure # Might notify for missing dependencies
2 make
3 sudo mv /usr/bin/gdb /usr/bin/gdb.old # Backup the old version
4 make install
```

Optimized values

```
1 (gdb) p some_variable
2 $1 = <value optimized out>
```

- It is not possible to disable optimization for the entire kernel
- Needs to be done on a per-file basis
 - Identify the file containing the variable declaration
 - 2 Update the corresponding makefile (example with fs/ext4/Makefile):

```
obj-$(CONFIG_EXT4_FS) += ext4.o

CFLAGS_bitmap.o = -00

ext4-y := balloc.o bitmap.o dir.o file.o fsync.o ialloc.o inode.o page-io.o ¥
ioctl.o namei.o super.o symlink.o hash.o resize.o extents.o ¥
ext4_jbd2.o migrate.o mballoc.o block_validity.o move_extent.o ¥
mmp.o indirect.o extents_status.o xattr.o xattr_user.o ¥
xattr_trusted.o inline.o readpage.o sysfs.o
# ...
```

Mounting a virtual disk

- With Qemu, the root filesystem is generally present on a virtual disk (disk image)
- What if there is a crash at boot time that prevent the emulated machine from booting?
- You can mount the virtual disk on the host to try to fix the problem from there
 - Mounting depends on the image format
- Check the format using file:

Mounting a virtual disk (2)

Qcow2format:

```
sudo modprobe nbd max_part=63
sudo qemu-nbd -c /dev/nbd0 image.qcow2
sudo mount /dev/nbd0p1 /mnt/image

# work on the mounted filesystem ...

sudo umount /mnt/image
sudo qemu-nbd -d /dev/nbd0
sudo rmmod nbd
```

> Rawformat:

```
file hd.img
hd.img: x86 boot sector; partition
    1: ID=0x83, active, starthead
    32, startsector 2048, 40134656
    sectors; partition 2: ID=0x5,
    starthead 254, startsector
    40138750, 1802242 sectors,
    code offset 0x63

# 1048576 == 2048 * 512
sudo mount -o loop,offset=1048576 hd
    .img /mnt/image

# work on the mounted filesystem ...
sudo umount /mnt/image
```

Do not launch the VM while the root filesystem is mounted on the host

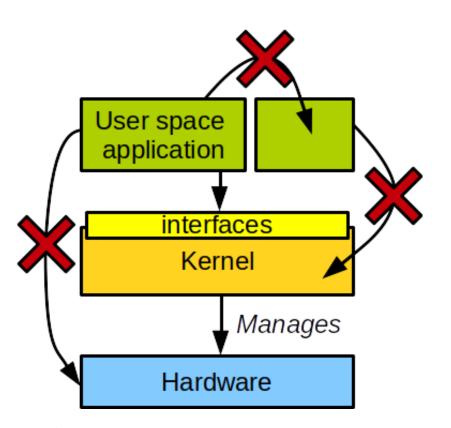
Additional info

- Cursor disappears in qemu window?
 - > Ctrl + Alt (right)
- Do not close Qemu without issuing the halt command to the (Qemu) VM
 - Risks leading to inconsistent filesystem state (data loss, VM unable to boot ...)
 - This is true for all VMs
- Qemu is too slow
 - Update Qemu version
 - Try KVM but you need a native installation

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Kernel entry point from user space



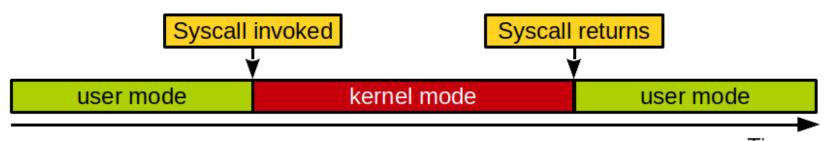
- The kernel:
 - Manages the hardware
 - Provides interfaces or user space processes to access the hardware and perform privileged operations
- User space cannot access HW/perform privilege operations directly

Interfaces + user space privileges restriction: the key to stability and security in the system

User/kernel mode

System calls (syscalls) are the one and only way an application can enter the kernel to request OS services and privileged operations such as accessing the hardware

- Examples of privileged/restricted operations:
 - Privileged CPU instructions (x86 examples): HLT, INVLPLG, MOV to control registers, etc.
 - Including IO related instructions (IN/OUT)
 - Access to all memory areas
 - Including areas mapping device registers



Time

Examples of syscalls

Syscalls can be classified into groups:

- Process management/scheduling: fork, exit, execve, nice,
 {get|set}priority, {get|set}pid, etc.
- Memory management: brk, mmap, swap{on | off}, etc.
- File system: open, read, write, lseek, stat, etc.
- Inter-Process Communication: pipe, shmget, semget, etc.
- > Time management: {get|set}timeofday, time, timer create, etc.
- > Others: {get|set}uid, syslog, connect, etc.

System calls table syscall identifier

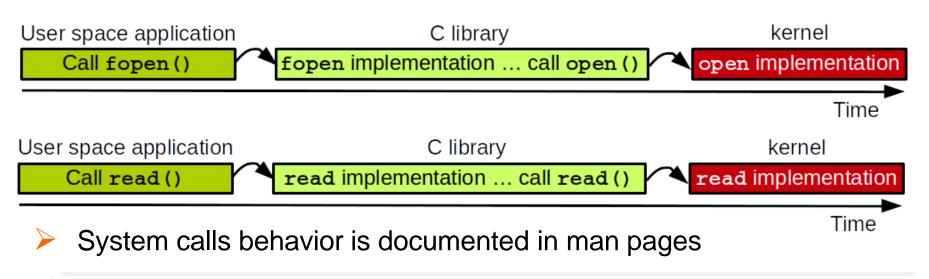
- For x86.64, the syscall list is present in arch/x86/syscalls/syscall 64.tbl (4.0, location changes with versions)
 - Text file translated to c source code by a script during the compilation process

```
## 64-bit system call numbers and entry vectors
# The format is:
# <number> <abi> <name> <entry point>
## The abi is "common", "64" or "x32" for this file.
# # The abi is "common", "64" or "x32" for this file.
# # 0 common read sys_read
# 1 common write sys_write
# 2 common open sys_open
# 3 common close sys_close
# ...
```

- Syscall identifier: unique integer
 - Currently 352 (linux 4.9) for x86 64
 - New syscalls identifiers are given sequentially

Syscall invocation: user space side C library

- Syscalls are rarely invoked directly
 - Most of them are wrapped by the C library
 - The programmer uses the C library Application Programming Interface (API)



1 man <syscall name>

Syscall invocation: user space side

C library: Invocation without wrapper

- Some syscalls does not have a wrapper in the C library
- > A syscall can be called directly through syscall

) man syscall

```
#include <unistd.h>
   #include <sys/syscall.h> /* For SYS xxx definitions */
   int main(void)
     char message[] = "hello, world!\formalf";
     int bytes written = -42;
     /* the first "1" is the "write" syscall identifier */
 9
     /* the second "1" is the standard output file descriptor */
10
     /* the remaining arguments are the "write" syscall arguments */
11
     bytes written = syscall(1, 1, message, 14);
12
13
     /* or */
14
15
     bytes written = syscall(SYS write, 1, message, 14);
16
17
     return 0;
18
19
```

Syscall invocation: user space side

Invocation without the C library

- On x86 64, syscalls can be used directly through the syscall assembly instruction
 - Usage example: disabling the C library considerably reduces the size of a program

```
.global start
2345678
             .text
    start:
             # write(1, message, 14)
                      $1, %rax
             mov
                      $1, %rdi
             mov
                      $message, %rsi
             mov
                      $14, %rdx
             mov
10
             syscall
11
12
             # exit(0)
13
                      $60, %rax
             mov
14
                      %rdi, %rdi
             xor
15
             syscall
16
   message:
17
             .ascii "Hello, world!\formalfon"
```

Compilation & execution:

```
1 gcc -c syscall_asm.s
2     -o syscall_asm.o
3 ld syscall_asm.o
4     -o syscall_asm
5 ./syscall_asm
6 hello, world!
```

Parameters are passed in registers

syscall asm.s

User/kernel space transition

- User space applications cannot call kernel code directly
 - For security and stability, kernel code resides in a memory space that cannot be accessed from user space
 - So how is a syscall invoked from user space ?

User/kernel space transition (2)

- A few words about interrupts:
 - 1 Asynchronous: **hardware interrupts**, issued from devices
 - Ex: keyboard indicating that a key has been pressed
 - Synchronous: exceptions, triggered involuntarily by the program Itself
 - Ex: divide by zero, page fault, etc.
 - Synchronous, programmed exceptions: software interrupts, issued voluntarily by the code of the program itself
 - INT instruction for x86
- When an interrupt is received by the CPU, it stops whatever it is doing and the kernel executes the interrupt handler

User/kernel space transition (3)

- So how is a syscall invoked from user space ?
 - User space put the syscall identifier and parameters values into registers (x86)
 - Identifier in rax
 - > x86 64: parameters in rdi, rsi, rdx, r10, r8 and r9
 - Then issues a software interrupt
 - On x86, interrupt 128 was used:

```
1int $0x80
```

- ➤ Now sysenter (x86 32) and syscall (x86 64)
- The kernel executes the interrupt handler, system call handler
 - Puts the registers values into a data structure placed on the stack
 - Checks the validity of the syscall (number of arguments)
 - Then execute the system call implementation:

```
1 call sys_call_table(, %rax, 8)
```

Syscall implementation execution: example with gettimeofday

- Example: gettimeofday
 - implementation in sys
 gettimeofday

```
NAME
 2
          gettimeofday, settimeofday - get / set time
 3
   SYNOPSIS
          #include <sys/time.h>
          int gettimeofday(struct timeval *tv, struct timezone *tz);
9
          int settimeofday(const struct timeval *tv, const struct timezone *tz);
10
11
         DESCRIPTION
         The functions gettimeofday() and settimeofday() can get and set the time as well as a
         timezone. The tv argument is a struct timeval (as specified in <sys/time.h>):
14
              struct timeval {
                                         /* seconds */
15
                   time t
                            tv sec;
                  suseconds t tv usec; /* microseconds */
16
17
              };
18
          and gives the number of seconds and microseconds since the Epoch.
19
```

Syscall implementation execution: example with gettimeofday (2)

Usage example:

```
#include <stdio.h>
   #include <stdlib.h>
   #include <sys/time.h>
   int main(void)
     struct timeval tv;
     int ret;
     ret = gettimeofday(&tv, NULL);
     if(ret == -1)
13
       perror("gettimeofday");
       return EXIT FAILURE;
14
15
16
17
     printf("Local time:\formation");
18
     printf(" sec:%lu\u00e4n", tv.tv sec);
     printf(" usec:%lu¥n", tv.tv usec);
19
20
     return EXIT SUCCESS;
```

```
1 ./gettimeofday
2 Local time:
3 sec:1485214886
4 usec:523511
```

Syscall implementation execution: example with gettimeofday (3)

Let's check it out using vim code indexing features

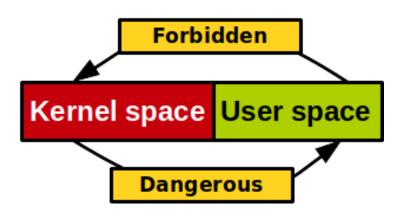
- > SYSCALL DEFINE2
 - Macro to define
 sys_gettimeofday
 (2 parameters)
- likely/unlikely
 - Compiler assisted branch predictor hints
- user pointers and copy {to | from} user
 - Kernel / user space memory management

likely/unlikely and kernel/user memory transfers

- likely/unlikely
 - include/linux/compiler.h:

```
1 #define likely(x) (__builtin_expect(!!(x), 1)) /* !! convert to int and */
2 #define unlikely(x) (__builtin_expect(!!(x), 0)) /* into actual 0 or 1 */
```

User vs kernel memory areas



- User space cannot access kernel memory
- Kernel code should not directly access user memory
- How to exchange data with pointers?

likely/unlikely and kernel/user memory transfers (2)

- The user attribute
 - include/linux/compiler.h:

```
#define user __attribute_((noderef, address_space(1)))
#define kernel __attribute_((address_space(0)))
```

- Used for static code security analysis (sparse)
- copy {to|from} user

```
static inline long copy_from_user(void *to, const void_user *from, unsigned long n);
static inline long copy_to_user(void_user *to, const void *from, unsigned long n);
```

- When a kernel function gets a pointer to some memory in user space it needs to use:
 - The kernel copies it into its memory area (copy from user)
- When the kernel wants to write in a user space buffer:
 - > It uses copy to user
- These functions perform checks for security and stability

Implementing a new system call

Basic steps

Write your syscall function

- 1 In an existing file if it makes sense
 - Is it related to time management? → kernel/time/time.c
- 2 Or, if the implementation is large and self-contained: in a new file
 - You will have to edit the kernel Makefiles to integrate it in the compilation process

Add it to the syscall table and give it an identifier

- arch/x86/syscalls/syscall 64.tblfor Linux 4.0
- 3 Add the prototype in include/linux/syscalls.h:

- 4 Recompile, reboot and run
 - Touching the syscall table will trigger the entire kernel compilation

Implementing a new system call

Editing the kernel Makefiles (2)

Example: syscall implemented in linux sources in

```
my_syscall/mysyscall.c
```

1 my_syscall/Makefile:

```
1 obj-y += my_syscall.o
```

2 Linux root Makefile:

```
1 # ...
2 core-y += kernel/ mm/ fs/ ipc/ security/ crypto/ block/ my_syscall/
3 # ...
```

Implementing a new system call

Do you really need it?

- Pros: Easy to implement and use, fast
- Cons:
 - Needs an official syscall number
 - Interface cannot change after implementation
 - Must be registered for each architecture
 - Probably too much work for small exchanges of information
- Alternative:
 - Device or virtual file:
 - User/kernel space communication through read, write, ioctl

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