It's all about freedom

Freedom is free software's competitive advantage

Christian Einfeldt

Maybe it's true that a "Rose by any other name still smells as sweet," but not being able to easily pronounce the name of software is a big turn off to exploring it.

That's true whether the name of your word processing program is "Espronceda" or "Microsoft Word" or "OpenOffice.org Writer".

Now... unless you can read Spanish and are familiar with the digital literacy efforts of the local Regional government of Extremadura, Spain, you probably would not have recognized the name, "Espronceda" in the paragraph immediately above. You would have had absolutely no idea what that program did, and you probably thought that it wouldn't be written in a language you could understand, so why bother?

My point exactly!

> The ability to change and adapt is software libre's ace in the hole

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The name "Espronceda," is the name that Extremadurans gave to their flavor of OpenOffice.org Writer. Extremadura is one of the seventeen Regions of Spain (The term "Region" in Spain is closely analogous to the term "Province" in Canada or "State" in the U.S.A.). Each Region has its own unique government, history, culture, and in many cases, its own language. The government of Extremadura has made digital literacy a prime policy priority. To speed the adoption of software libre in Extremadura, the officials there decided to rename OpenOffice.org Writer as Espronceda, after the famous Spanish poet, Jose de Espronceda.

It's a beefy issue

This issue is big... very big! The name given to a software application is what simple end users like me and my six billion closest friends first encounter, and it shapes our view of the code and helps us to answer the biggest questions that a simple end user asks when facing a new application for the first time: "Why should I use this code?", "How do I use this code?" and "Why should I care? Isn't a computer just like a toaster?"

The ability to change and adapt is software libre's ace in the hole. As a disruptive technology, software libre relies on disruptive distribution channels, such as the free telecentros in Sao Paulo, Brazil, or the public libraries in Scotland. These channels expose new users to an application without a sale occurring. Many of the users of the 120 Sao Paulo telecentros do not own computers themselves. Indeed, some of them don't even have a reliable electricity supply. The telecentros are located in the heart of the poorest favelas (slums) which ring Sao Paulo, a city of sixteen million souls. Likewise, the Extremaduran telecenters service typically underserved users who, for what ever reason, are too intimidated or poor to have a computer in their homes. Similarly, the Scottish libraries circulate copies of OpenOffice.org to those who cannot afford Microsoft Office.

This is a huge market we're talking about

Of those six billion closest friends to which I was referring above, only about a billion live in countries with average annual incomes in excess of US$10,000.00. The remaining five billion live in countries well below that annual average. The ability of users in those countries to localize software

libre into their own languages represents a huge advantage for free software. Proprietary software companies have created the impression that it is improper to change the names of applications, and have locked down the code so that localization is not possible without the source code. This practice shifts the cost of localizing to these companies; whereas companies such as Sun and Novell will gain the benefit from the externalization of some of the localization costs to the shoulders of the local communities, who are the masters of their local dialects, anyway.

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The local Extremaduran government was in a better position to choose the name of Espronceda for its version of Writer than was Sun Microsystems or the global OpenOffice.org community. Each local community is in the best position to understand what will make sense for its residents. Leaders in those communities best understand how to go about the process of winning "buy-in" from local users, and what potential names best reflect the local cultural proclivities for approaching a novel technology.

Penguinistas are familiar with the advantage of modular interfaces when it comes to fitting pieces of technology together, but it's also helpful to see the GUI itself as a key modular strength of software libre. This view might seem rather straightforward, but it's actually rather contentious and difficult to implement in practice. Michael Robertson, CEO of Linspire, recently had a conversation on the English language OpenOffice.org marketing list about this issue with Bruce Byfield, an independent columnist and contributor to the OpenOffice.org project, and author of a user manual for OpenOffice.org.

Bruce Byfield felt that while it was a good thing for Linspire to pursue widespread proliferation of the code (what Linspire humorously calls "flouridation"), mere flouridation without more deliberate education was not enough:

" As for the comments about [Linspire] vendor lock-in, they refer specifically to Linspire's re-labelling of software packages for the purposes of branding, and - so far as I can see - an absence of any mention of antecedents in its general advertising and presentation of packages. I know a number of non-geeks, for example, who are under the impression that Linspire is a completely new operating system, rather than an adaptation of GNU/Linux in general and Debian in particular. While this re-branding makes sense in commercial marketing, I observe that it does not play well in free software/open source communities, where credit is often the only reward for effort." (Bruce Byfield, 2004/10/15, OOo Marketing list server, http://marketing.openoffice.org/servlets/ReadMsg?list=dev&msgNo=17344)

Michael Robertson replied by saying that the market of folks who care about the philosophy of their computer software has been taped out, and that the bulk of remaining potential customers are only interested in out-of-the-box functionality:

"You are right we do not emphasize the philosophy. I wouldn't say we emphasize the technology either. We emphasize the benefit to the end user/retailer/OEM and to all parties it revolves around economics. The vast majority of OEMs and retailers don't care about the philosophy. They only care if there's a chance for them to make money. If there's no chance then they don't carry the product, it's that simple. If you start talking to Walmart about philosophy you will quickly be escorted out of the office. And they are not unique among major distributors or retailers that make business decisions based on economics. It has nothing to do with whether they agree or disagree with the philosophy behind free software it's just that's not how they make decisions. So how do you win them over? You have to make it economically beneficial for them to carry your products." (Michael Robertson, 2004/10/15, OOo Marketing list server. http://marketing.openoffice.org/servlets/ReadMsg?list=dev&msgNo=17357)

Then Michael Robertson wrote something, which reminded me of Espronceda:

"They [OEMs and retailers] decide if the product is appropriate for their consumers, it matters little what we say. If they turn on the screen and are bombarded with a foreign language like Mozilla, Gimp, Gnome, KDE, Gaim, K3B, Gnu, Evolution, etc. its a very short conversation. This will confuse my users. Not interested – thank you. Come back when it's easier. *You have to frame terms in the way that they'll understand.* So 'K3B' becomes 'CD Burner' and 'Mozilla' becomes 'Web Browser' and 'Gaim' becomes 'Instant Messenger'. This isn't to slight the developers (all the Abouts and stuff remain the same). It is designed to make it palatable for OEMs and distributors as well as end users. Where the name is intuitive we don't touch it. OpenOffice.org is sufficiently straight forward so we don't change the name for any of the pieces OpenOffice Calc, OpenOffice Writer all keep the same name." (Michael Robertson, 2004/10/15. [Italic added]. http://marketing.openoffice.org/servlets/ReadMsg ?list=dev&msgNo=17357)

There is a common thread between Linspire's marketing efforts and the efforts of the Extremadurans to increase adoption of free software. Both efforts involve a bit of splash and flash. Linspire has its "Click-and-Run" button for easy download; and the Extremadurans have actually gone to the effort of creating a slick cartoon character called Linextremix (http://www.linextremix.com/) to interest kids in trying out their local version of Linux, which they call "LinEx."

Of course, disagreements about naming free software packages have a long and complicated history. The debate about whether to call the operating system "GNU/Linux" or to reserve that term solely for the kernel has been around since Linus first opened his bedroom door to release his kernel.

It's a cultural difference

But there is a solution to this on-going issue, which deserves a fresh look. Consider the difference in naming applications to be a *cultural* difference, and approach it the same way any cultural difference would be approached. There are very few sober-headed folks who would assert that American English is "better" than British English, or that Castilian Spanish was "better" than any of the other dialects of Spanish,

or that Mandarin Chinese is "better" than Cantonese Chinese. Nor would any enlightened person insist that a recent immigrant to the US from another country should adopt an English first name such as "Tom" or "Sue" because their native language name was unfamiliar. Names and languages in those contexts are viewed as cultural artifacts, and are respected as such.

If we view the naming of free software code base as much a cultural artifact as language, we would find it easier to understand that Bruce Byfield, Linspire, Richard Stallman, and the Extremadurans all have a common valid point: choosing a name counts. Big Time! It has been my experience that people involved in the free software conferences I have visited attempt to speak the foreign languages of the cultures they visit, even if only a word or two. The software libre community generally prides itself as being multi-cultural. If we look at Linspire's act of renaming the open code it uses as a cultural accommodation just as much as the Extremaduran effort, we will understand that North Americans have a cultural bias that tends to see technology mostly as a mechanistic servant, and nothing more.

Contrast that view with the views of South Americans I encountered during filming at the FISL free software conference in Porto Alegre, Brazil, in Spring of 2004. They tended to use the "GNU/Linux" appellation much more widely when referring to the whole operating system, and tended to reserve the term "Linux" for the kernel only. Many of my free software friends in North America, by contrast, just refer to the whole package as "Linux," with the understanding that GNU is every bit as important to the functioning of the OS as is the X Windowing system. Their preference was based on the philosophy of freedom that is embodied in the code perhaps even more so than the low cost of adoption, although the latter certainly played a role too. They saw their ability to control the code as an opportunity for hemispheric technological independence and cultural advancement through enhanced digital literacy. Richard Stallman's emphasis on freedom spoke to them, whereas the North Americans we have interviewed often didn't see what the fuss was about. One culture sometimes values what another culture takes for granted.

All marketing is a local phenomenon

To further develop an earlier thought, the flexibility to choose a name for an application is one of the key competitive advantages of software libre. Consider this passage from the *Seeing What's Next*, a 2004 publication of the Har-

vard Business School Press by co-authors Clayton Christensen, Scott Anthony, and Erik Roth:

> "Consider the difference between Microsoft Windows and the Linux operating system. Windows is a highly integrated, interdependent operating system. To optimize the operating system, application developers must conform their products to meet Microsoft's interface requirements. Efforts to try to modify Windows to improve individual applications would be disastrous; any individual change would have literally thousands of unanticipated consequences and operating system problems. Linux works the other way, because its goal is to enable optimized applications. The Linux operating system itself is modular. As long as you follow the rules, you can modify it to optimize the performance of an application." (*Seeing What's Next*, p. 20)

The ability of local users to create the name for free software applications to their own familiar names is a key to the *optimization* of that code for local use. The local users do not have to conform to the program's GUI; rather, the GUI is modular and can conform to their needs. This should provide software libre with a key marketing advantage in numerous smaller markets, which the disruptive software libre can march up-market.

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The current market leader is faced then, with an innovator's dilemma: does it fundamentally change its business model and open its market-dominating code, such that local users can tweak it the same way that software libre can be tweaked; or does it bear the cost of changing that code; or does it ignore these impecunious markets and risk that free software takes a firm root there? The market leader has no attractive options here, as all possible options entail greater costs with declining fiscal reward.

The world is a very big place, with people who have quite divergent needs. Software libre has an economic advan-

tage in serving the needs of those diverse cultures. Both the for-profit and non-profit institutions, which serve the needs of this diverse population, will have huge market advantages over their competitors. Bruce Byfield and his friends might like Debian. The pragmatic customers in North America might like a simple out-of-the-box solution like Linspire. Richard Stallman told us during his interview for our film that he likes the Ututo-e distro (`http://linux-cd.com.ar/ututo/`) from Argentine because it's all free software. These differences reflect deeply held value structures, which although different, are not incompatible. Whether you like to distribute the code, and then teach freedom when you have the newbies' attention, or whether you like to talk about freedom to get their attention, you are helping to show people how to love Tux and the GNU gnu.

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About the author

Christian Einfeldt is the producer of the upcoming film "the Digital Tipping Point: the culture of freedom in cyberspace", to be released in September, 2005. For more info, go here (`http://www.digitaltippingpoint.com`)