

## MARKET NOTE

# SUSE Announces SUSE Linux Enterprise 15, the Latest Version of Its Flagship Operating System

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## EXECUTIVE SNAPSHOT

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### FIGURE 1

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#### Executive Snapshot: SUSE Launches a Multimodal OS – SUSE Linux Enterprise 15

This IDC Market Note details SUSE's June 25 launch of SUSE Linux Enterprise 15 (SLE 15), the latest version of the company's flagship operating platform.

#### Key Takeaways

- SLE 15 enters the steadily growing but quickly evolving commercial Linux segment of the otherwise challenging global operating systems (OSs) market.
- The main goal of the SLE 15 release is to more effectively meet the requirements of multimodal IT, which encompasses emerging and next-generation platform technologies in addition to traditional datacenter technologies.
- SUSE has built multiplatform support into SLE 15 in reflection of this goal. The “common code base” is a key feature of the SLE 15 platform that helps bridge traditional and software-defined infrastructure.
- SUSE uses a “Modular+” architecture with SLE 15 to address new challenges its customers are facing when trying to innovate and implement 3rd Platform technologies while keeping existing IT operations functioning properly.
- SUSE designed SLE 15 with the developer community in mind. Developers can easily transition from openSUSE Leap or the free developer versions of SLE to the fully supported SLE 15 distribution.

Source: IDC, 2018

## IN THIS MARKET NOTE

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SUSE, a provider of Enterprise Linux, is a subsidiary of Micro Focus, a United Kingdom-based multinational IT company that specializes in enterprise software and consulting services. In 2017, SUSE had the second-largest revenue in the commercial Linux segment of the worldwide operating systems and subsystems (OS&S) functional market according to IDC's Semiannual Software Tracker. The company has been successful in penetrating various industries such as finance, aerospace, retail, pharmaceutical, and manufacturing. From a use case standpoint, SUSE's flagship distro (short for distribution), the SUSE Linux Enterprise (SLE), comes out at the top for SAP applications, mainframes, high-performance computing (HPC), and other key Linux enterprise-centric use cases.

SLE 15 is the next major version of SUSE's flagship operating system (OS) distro since its predecessor SLE 12 released four years ago, which is in line with the typical release cycle of three to four years for major versions of SLE. The company also generally releases service packs about once a year, which can include different product enhancements, maintenance updates, and security patches. This document details the key features and updates of SLE 15 followed by IDC's perspective on these developments. The key features and updates of SLE 15 are:

- **Multiplatform support:** Companies around the world are managing multimodal IT environments and increasingly face new challenges around integration and interoperability and application workload mobility. To address these challenges, SLE 15 has a common code base, which means that every instance has the same source code rather than multiple code streams for different hardware setups. As a result, the same code can run on both traditional and next-generation software-defined infrastructure, with hardware ranging from IBM mainframes to Raspberry Pi-based IoT devices.
- **Modular architecture:** SLE 15 expands upon SUSE's strategy of offering optional modules on top of its base server operating system, an approach that was first introduced with SLE 12. In SUSE's "Modular+" architecture, everything is a module so customers can install only the features that are needed. This approach helps customers minimize up-front planning and reduce risk and enables SUSE to deliver product updates and patches more frequently for its various modules compared with its service pack updates.
- **Developer friendly:** SLE 15 allows developers to easily and quickly transition from community Linux (openSUSE Leap) or free developer subscriptions of SLE to production environments using the fully supported SLE 15 distribution. It is designed to be integrated into commonly used modern development methodologies like DevOps and CI/CD.

## IDC'S POINT OF VIEW

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SLE 15 enters the Linux segment – a bright spot in the otherwise challenging operating systems market over the past few years. Despite changes in demand, mostly due to the proliferation of open source and vertically integrated stacks, operating systems remain a foundational building block for modern infrastructure. Linux has become a preferred platform for the cloud and for modern cloud-native application development. It has also gained stature as a preferred development platform for most ISVs today. Today Linux is widely used for hosting traditional as well as next-generation applications across bare metal, virtual, and container-based delivery methods.

Enterprise customers typically purchase commercial distros like SLE 15 to supplement internal IT departments with support from OS suppliers like SUSE. The nonpaid Linux market has been driven

over the past several years by hyperscale and cloud vendor buildouts, as these customers typically have large internal IT organizations capable of building and maintaining heavily customized Linux distros for their own internal use.

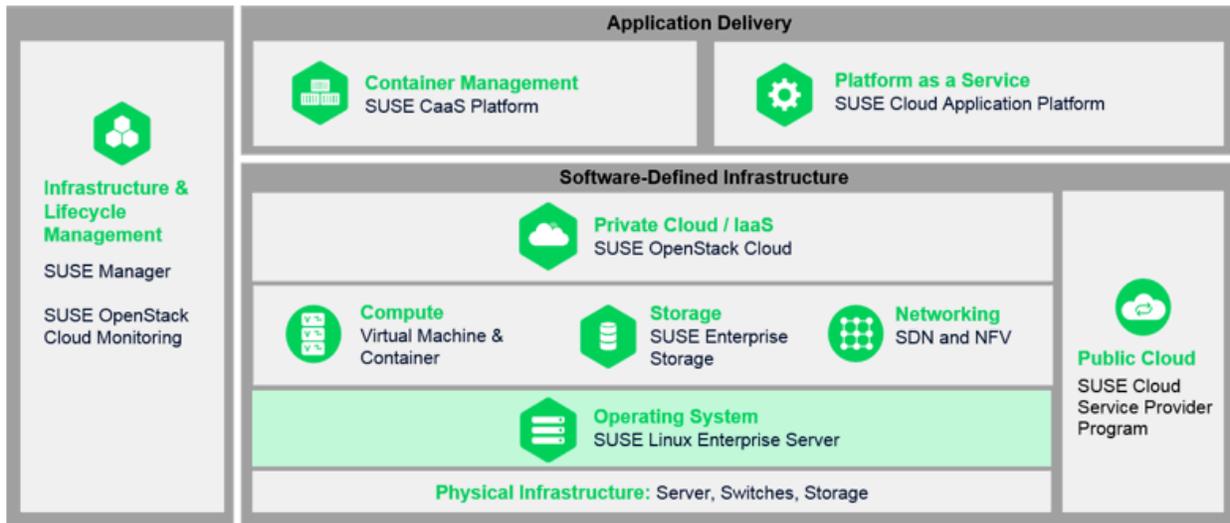
While many companies are standardizing their IT infrastructure environments using infrastructure based on the x86 architecture, there is also a surge in demand for a common OS that can drive platforms based on other silicon architectures such as Arm and POWER, to name a few. This is because such "non-x86" platforms have unique features and benefits that can significantly reduce the "time to value" for specific use cases. For example, mainframe hardware is often deployed for use cases in which reliability and fault tolerance are top concerns. Arm architectures are preferred at the edge, and POWER architecture is superior in AI use cases. IDC believes the common code base of SLE 15 makes the product a multiplatform OS that is well suited for heterogenous computing environments. SUSE can leverage this feature to help customers bridge the gap between traditional infrastructure environments and modern software-defined infrastructure more effectively.

IT departments face the challenging task of supporting digital transformation initiatives in addition to maintaining existing infrastructure investments without too much additional budget. SUSE's "Modular+" architecture helps address these challenges by allowing companies to start with minimally viable systems. This approach minimizes the need for up-front planning and simplifies decision making to help companies reduce the risk of new IT investments. Different features and functionality can be added as needed over time through modules that are grouped by use cases like development tools, web and scripting, and containers. Another key advantage of the modular approach is that SUSE can provide more timely updates compared with traditional service packs that are launched approximately every year. This is particularly key as quickly evolving new and emerging platform technologies play a more important role in companies' IT infrastructure environments.

While SUSE's core customer base remains traditional IT departments, the supplier has been working for several years to better serve the developer community. Developers are becoming increasingly important as more companies are creating new custom applications as part of digital transformation initiatives. As outlined in Figure 2, SUSE now offers application delivery solutions including the SUSE CaaS Platform and SUSE Cloud Application Platform in addition to its core software-defined infrastructure portfolio. SUSE designed SLE 15 to be easily implemented into companies' existing DevOps processes by allowing developers to easily transition from community Linux to fully supported SLE 15. This feature will also support collaboration with the openSUSE community and allow developers to take advantage of community packages to accelerate development times.

FIGURE 2

SUSE Portfolio



Source: SUSE, 2018

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Synopsis

This IDC Market Note details SUSE's announcement of SUSE Linux Enterprise 15 (SLE 15), the next major version of the company's flagship Linux distro. We provide an overview of the new offering and its key capabilities as well as market dynamics in the growing but evolving commercial Linux market segment.

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