

Internal industry update – month ending: 05-03-31 [#118]



Environment

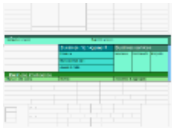
Industry and economy

- ❖ Consolidation consumer services: IAC/InterActiveCorp buy Ask Jeeves – IAC estimates that Ask Jeeves draws 42 million unique monthly users in the U.S., while its own Web sites (Match.com, Evite, Ticketmaster, Hotels.com, CitySearch and Expedia) collectively attract 44 million.
- ❖ Consolidation business systems: Oracle buys Retek – after bidding war with SAP.
- ❖ Consolidation Telcos: Qwest – try to buy MCI (to stop Verizon)
- ❖ Sedimentation stacks: IBM buys Ascential Software – for \$1.1b to improve its integration offerings.
- ❖ Outsourcing: EDS Atlas UK Defence – a 10-year \$7.7b contract to renew IT systems. The Atlas consortium comprises EDS, Fujitsu, General Dynamics, LogicaCMG, Cogent (and junior partners HP and IBM); it will provide networks, servers, terminals, printers and associated operating software, services such as security authentication, productivity tools including office automation, e-mail messaging systems, directory services, and hosting for applications.

Online services

Business on-line services

- ❖ Service management: NetSuite NetCRM-Services – manages client relationships, activity and time management, service-delivery personnel, service item management, project tracking, self-service center, document management, calendaring and dashboards for service personnel with KPIs.



Business services, management, product services and intelligence

Business management

- ❖ ERP/CRM: MS Business Solutions – says a first wave of applications will begin shipping in 2005 and a second wave in 2008, leading to a converged code base. Each product line (Navision, Great Plains, Axapta, Solomon, MS CRM) when next updated will have some shared UI changes, the second set of updates will involve shared backend modules/code.

Business services

- ❖ Health: IBM reigns in Spain – building \$34m Linux-based computer network for a Spanish health care agency for residents of the Extremadura. It will provide 14,000 doctors and medical professionals with access to all kinds of health information to improve patient care, reduce paperwork, and improve the security of patient records.

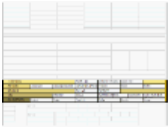


Business tools – produce, collaborate, organise knowledge

Collaborate

- ❖ Collaboration: Lotus Sametime ABI – due Q3
- ❖ Collaboration: AIM Sync – allows AIM users to see when contacts are online and available to chat through Outlook. Contacts from Outlook can be added to the AIM buddy list; the presence of contacts is shown by placing the AOL icon in e-mail/address book/phone list views of Outlook. The icon can launch a chat session or send a text message to a mobile phone by SMS.
- ❖ Collaboration: MSN Messenger 7.9 – will offer improved video chat capabilities developed by Microsoft and Logitech (due in a month or so).
- ❖ Collaboration: MS buys Groove – to help with offline collaboration and P2P tools. MS will integrate this with their new products (e.g. Longhorn, Office 12), SharePoint server and Live Meeting Server.

- ❖ Collaboration: Symbian Exchange sync – Symbian licenses MS Exchange Server's ActiveSync, allowing Symbian-based mobile phones to synchronize (e-mail, calendar, contacts, other PIM stuff) with servers running Exchange. Nokia already has an agreement that allows Series 60/80 phones to use ActiveSync to synchronize information with Exchange servers. Nokia says it has no plans for building MS's OSES into its products.



Software infrastructures

Presentation & integration

- ❖ Presentation: DENG – is an XForms engine that enables developers to use XForms in their Web applications; it will become part of UGO (a larger XML browser framework). It doesn't yet support schema validation or the range and select forms controls. XForms is built on a MVC architecture; data is exchanged between a Web form and server using XML. XForms can call XSL and XPath for input format and type validation as well as for calculations and special formatting.
- ❖ Presentation: Icesoft Icreader SDK – is being incorporated into the Macromedia ColdFusion application server for conversion of HTML-based data into PDF or Flash content.
- ❖ Browser: IE dips below 90% – with Firefox at 6%, but the rate of IE's decline has slowed.
- ❖ Browser: Netscape 8 – is based on Firefox (but can also use the IE browser).

Language & other

- ❖ Languages: MS VB 6.0 – paid support to stop (and not a moment too soon).
- ❖ Frameworks: Eclipse – the Eclipse platform is said to be evolving into something akin to both a server and desktop OS. Sector-oriented initiatives are also being established (e.g. HL7). BEA will release tools from the Eclipse Web Tools Platform project soon, CA is a strategic developer within Eclipse focusing on systems management, Actuate have a BI project (Business Intelligence and Reporting Tools).
- ❖ Open stacks: Novell and JBoss – will work together on JBoss Enterprise Middleware Suite (JEMS) which includes: portal server, Java BPM workflow engine, ESB, Hibernate query software, the JGroups communications software and an open-source implementation of Java Management Extensions.

Service & process

- ❖ SOA: Sonic – now has a uniform service invocation model and a new relational database service. SOA Suite has: ESB for application integration, Orchestration Server, XML Server, and the new Database Service product. Workbench provides an integrated services environment for SOA infrastructure. Sonic Database Service integrates relational data sources into an SOA (with connectivity with major databases), Collaboration Server is a b-to-b server enabling the ESB to manage partner profiles and integrate business partners, XML Server provides for operational data processing and storage (the Orchestration Server orchestrates services across an enterprise).
- ❖ SOA: SOA Software – is the new name for Digital Evolution which provides WS security, management, and provisioning solutions. SOA Software's SOA Fabric product set includes the Service Manager, Registry, and XML VPN.
- ❖ BP: MS BPO platform strategy group – will combine knowledge of domains with knowledge of MS's foundation technology to create BPO solutions.

Identity & location

- ❖ Identity: BMC buys OpenNetwork – a maker of Universal IdP (single sign-on technology), which works closely with MS's Identity Integration Server

Data & metadata

- ❖ Datastores: IBM Records Manager – includes IBM DB2 8.3: Content Manager, Document Manager, CommonStore. Content/Document Manager workflow capabilities are enhanced with graphical tools that help end-users create workflows and automate business processes. Content Manager now has XML features and tools for the automated capture and management of XML documents in a common content repository.

- ❖ EII: Software AG EII 2.1 – incorporates Semantic Web technology and creates real-time views of business data that is often distributed across multiple systems. It starts at \$60k per CPU [Cf. Metamatrix]

Implementation

- ❖ IDE: Netbeans scripting – Sun releases early versions of software module code to be written in Groovy and Jython from within NetBeans (Sun is aiming to not be Eclipsed)
- ❖ XML relational: MS Omega – is intended to bridge the gap between relational, object, and XML data models. It is a strongly typed, data-oriented programming language to bridge semi-structured hierarchical data (XML), relational data (SQL) and the .Net CTS (Common Type System), and extends C# with asynchronous concurrency abstractions.

Platform – clients

Clients mobile

- ❖ Mobile displays: Toshiba detachable screen – has a prototype stylus-operated display that can be detached from a computer device (e.g. PC). It is a 300mm XGA TFT LCD using 802.11b, is 18mm thick, weighs 530 grams and has limited battery life - but production versions will be thinner and lighter (e.g. 10mm, 400 grams, and 4 hrs life).
- ❖ Mobile biometrics: Omron face-recognition – in camera-enabled (100,000-pixel res) mobile devices provides an alternative to a password or fingerprint scanner for controlling access. It requires no additional HW, works with image sensors already fitted into phones and occupies about 450KB of the device's ROM and 370KB of RAM.
- ❖ Mobile storage: Fujitsu 120Gb drive – in a 2.5 inch drive.
- ❖ Phone: Voq Prof Phone from Sierra Wireless – has Windows Mobile 2003, voice dialling, a speaker phone, a QWERTY keyboard, does PIM, browsing, email (with ActiveSync back to Exchange as well POP3/IMAP) and costs \$500.
- ❖ Phone: Ericsson P910a – has a removable/flip-out 33-key QWERTY keyboard, a jog dial and stylus, handwriting recognition, integration with Lotus Notes/Exchange, 1GB of removable storage, GSM/GPRS, Bluetooth/IR and is \$750.

Clients desktop

- ❖ Notebooks: Sony VGN-FS Vaio – will be focused on business users that have X-black LCD technology and will come with better maintenance services.
- ❖ Client Power: Toshiba fuel cell – the DMFC prototype produces 20 watts of power and can power a small notebook PC for about 10 hours (it is a 1 liter unit).
- ❖ Client Power: Antig Technology – has a CD ROM-sized DMFC fuel cell that produces 10 watts and 7.2 volts.
- ❖ Open clients: Novell Linux Desktop 10 – includes an Office suite, Browser, Collaboration clients (email, IM etc.), desktop search (searches documents, e-mail, IM, Web history, source code, music files, PowerPoint files and other applications), note-taking tool (Tomboy), personal photo management application (F-Spot lets users drag and drop icons, such as people, places, and favourites, onto thumbnail images of the photos and then sort them)

Platform – servers

Servers

- ❖ Virtualisation: Intel and VMware – are to work together to optimize VMware's server product with Intel's future chip-level virtualization technologies.

Platform – utilities, storage, networking, management and security

Utilities

- ❖ Storage utility: Lucent – is testing a hosted storage service using optical networking equipment to link to storage systems.

Storage

- ❖ Storage: EMC top in external disks – With around \$3b in revenue (up 18%). Other company's revenue was as follows: HP \$2.6b (down 6%), IBM \$1.8b, HSD \$1.2b, Dell \$1.0b (19%).

Systems and network management

- ❖ Management: Novell ZENworks Linux Management 7.0 – works with Suse and Red Hat, has new imaging, configuration lockdown, remote management, inventory and software management capabilities and uses policy-driven automation



Governance and quality – Standards

Implementation

- ❖ UML: Rumbaugh of IBM says – Re: the background to UML "a bunch of [OO] methodologists [had] no incentive to [unify their approaches until] Rational, hired me, Ivar Jacobson and Grady Booch". Re: MS not really supporting UML and suggesting they don't see that much demand for it, and backing away from UML 2.0 – "a lot of people seem to think UML is useful. And just because Microsoft says something else, doesn't mean it's not going to happen".

