

Internal industry update – two weeks ending: 05-04-15 [#119]



Environment

Reporting (quarterly)

- ❖ Sun reports: a net loss – of \$61m on revenue of \$2.65b. Sun has now failed to increase revenue by more than 1% for 16 consecutive quarters.
- ❖ Apple: reports a net profit – of \$290m on revenue of \$3.24b (up 70%). 62% of revenue came from its Macs.

Industry and economy

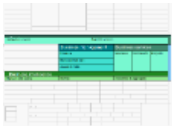
- ❖ BMC lay offs: about 850 people – (12% of its global workforce) and revenue and earning fall below expectations.
- ❖ Mandriva: is the new name – of Mandrakesoft (following its purchase of Conectiva)
- ❖ CA reorganise: into five units – Enterprise Systems Management; Security Management; Storage Management; Business Service Optimization; and CA Products. CA's 2,500 sales people will continue to focus on the 18,000 larger customers.
- ❖ Complex Projects: UK Department of Work and Pensions – continues to retain substantial payments from EDS (\$20m). Payments are linked to SLAs and functionality delivered. The project was 2 years behind schedule and \$400m over budget. A Select Committee characterized the system as an "appalling waste of public money".
- ❖ Consolidation storage: Network Appliance buys Alacritus – for approximately \$11m. Alacritus' Virtual Tape Library (VTL) software makes disks emulate tape, providing high performance for large-scale backup environments without disrupting established tape backups.
- ❖ Consolidation storage: Cisco buys Topspin – for \$250m. Topspin sells programmable server switches used in systems from vendors including Dell, HP, IBM, SUN etc.
- ❖ Consolidation NW: Siemens buys Myrio – which provides middleware and applications for emerging IPTV services.
- ❖ Consolidation management: CA buys Concord Communications – for \$330m and will integrate Concord's eHealth SW with Unicenter products.
- ❖ Consolidation management: Semotus buys Expand Beyond – which makes a family of products called PocketDBA that monitor databases remotely from wireless devices. Semotus develops SW used to deliver information wirelessly from back-end systems to devices used by employees in the field.
- ❖ Sedimentation stack: Oracle buys Oblix – an identity management technology developer. Oracle will integrate Oblix's security products with its own infrastructure software.
- ❖ Sedimentation middleware: Tibco buys ObjectStar – for data integration on the mainframe and partners with Embarcadero Technologies to license DT/Studio for ETL capabilities.

Online services

Consumer on-line services

- ❖ Collaboration: AOL Internet Phone Service – is introduced to 40+ areas in the US. Subscribers plug a traditional touch-tone phone and a broadband Internet connection into an adapter. The VOIP service is integrated with existing AOL services (contact lists, IM, e-mail). [Skype is cheaper].
- ❖ Search wireless: Google Local – is oriented to allow access from browser-enabled phones and takes a term and location as search criteria [Cf Google SMS].

Business services, management, product services and intelligence



Business management

- ❖ Accounting: Office Small Business Accounting – is a new product designed to support management of small businesses e.g. financial and business processes (payroll is offered through integration with outsourced payroll services providers).

- ❖ CRM: SugarCRM – is an open source-based commercial CRM project. Sugar Cube is a LAMP stack server appliance with Sugar Suite Professional 2.5 installed.

Business services

- ❖ Health: NHS Shared Business Services – JV between the DOH and Xansa will provide such services as accounts payable, debt collection, bank account reconciliation and account reporting. NHS SBS provides services to 47 of the 663 NHS organizations and DOH agencies. Oracle is providing the software for financial transaction processing and e-commerce functions; participating NHS organizations will use a copy of Oracle's Financials 11i. Xansa beat competition from KPMG and Atos Origin.
- ❖ Health: HIPAA – in April midsize and large health care organizations must meet the regulation's security compliance standards which stipulate that patient records must be protected not only for confidentiality but also against reasonably anticipated threats or hazards to the security or integrity of such information. Exactly what this means in technical terms is unclear.
- ❖ Transport: RFID Vehicle inspection stickers – have been suggested in Texas.
- ❖ Statistics: Insightful S-Plus 7 – is an updated version of S Plus statistical data analysis and predictive analytics platform.

Business tools – produce, collaborate, organise knowledge

Collaborate

- ❖ Collaboration: Exchange 12 – due at the end of 06. Its main rival will probably be Java-oriented products like Lotus Workplace platform (and Notes/Domino). Exchange 12 will have a role-based architecture (e.g. server roles are edge server, bridgehead server, unified messaging server, client access server, mailbox server, and public folder server). Development will be aligned with the next versions of other MS products e.g. Office (due end of 06), SharePoint Services/Portal, Live Communications, Windows Mobile etc.
- ❖ Collaboration: MSN Messenger 7 and Scrapbook – Messenger will offer improved video/voice calls (Cf. Skype) and in future it will also have an SMS gateway. Spaces is a scrapbook for posting blogs, photos, music lists etc.
- ❖ Collaboration opensource: Netline Open-Exchange Server – has improved compatibility with MS Outlook. It is intended to allow progressive migration to an open source environment while allowing any selected existing components to be retained (e.g. a database, e-mail server, or message transfer agents).
- ❖ Insecurity: MS IE & Outlook – eEye finds more flaws that could let an attacker take control over a system with minimal action. They were reported to MS on March 16/29. They are in Outlook and Outlook Express [perhaps it should be LookOut!]

Software infrastructures

Language & other

- ❖ Middleware market: IBM leads – IBM has 37% of the market, with BEA a distant 2nd with 7% and Oracle and Microsoft 3rd and 4th with 4%. IBM leads in application servers with 38% market share over BEAs 22% (this of course ignores MS's .Net). In integration: WebSphere has 22%, followed by Tibco with 10%, MS with 8% (growing fast), and webMethods at 5%. The real loser is BEA (Oracle and Microsoft both have significant revenue in other markets e.g. Databases, Applications, IDEs, Collaboration products etc.); only BEA relies on this market. BEA also lacks the completeness of IBM, Oracle and MS (to offer a one-stop-shop story) and fails to best-of-breed (to compete with niche vendors).
- ❖ Stacks Open: SpikeSource Core Stack – is a collection of seven pre-configured stacks that incorporate 63 open source components across 6 OS'es and 6 programming languages. They will offer 4 different levels of technical support, each of which will have an update service and will provide access to the SpikeSource online knowledge base.

Data & metadata

- ❖ Datastore: MySQL 5.0.3 – beta is made available with final release due end of Q2. The main additions include support for: stored procedures, triggers, views, transactions running across several servers/databases. 40% of MySQL's customers run it on Linux and 35% on Windows.

Implementation

- ❖ Presentation: Xamlon Pro – helps people work with C# and XAML (MS's XML-based markup language) to write Flash applications.
- ❖ Java IDEs: Computerworld looks at 4 IDEs – from Borland, IBM, Oracle, and Sun. IBM Rational Software Architect 6.0 (\$5.5k) uses Rational Web Developer/Application Developer and Eclipse 3.0 and has many features for designers and developers but it is expensive, often slow and less intuitive (because of Eclipse) than JBuilder or JDeveloper. Oracle JDeveloper (\$1.0k) has nearly all the features a developer wants but lacks the modelling a designer would expect; it is fast and intuitive. Borland Jbuilder (\$3.5k) supports many technologies (CORBA, code obfuscation, code security analysis, XML, HTML, tools for WS development/testing, J2ME, WAP etc.) and is easy to use but is not very strong in modelling (because Together is the modeller). Sun Java Studio Enterprise (\$1.9k), based on Netbean, has good collaboration and profiling tools, but is hard to use and some features are missing e.g. support for Struts and JSF.
- ❖ Persistence: Eclipse EJB 3.0 – Oracle will help build an open source EJB object-relational mapping tool that will focus on design-time tooling and support deployment to J2EE application servers.

Platform – clients

Clients mobile

- ❖ Clients virtual: VMware Workstation 5 – Teams feature allows users to connect multiple VMs together with configurable NW segments in order to simulate and test higher-end applications on a programmer's desktop system. It allows multiple point-in-time "snapshots" of running VMs to be taken and reverted back to any VM to be marked as a template (allowing multiple users to share its base installation).
- ❖ Client power: IBM/Sanyo DMFC – have developed a prototype DMFC for notebook PCs that will probably be commercialized around 2007/2008, cost \$500 and be used in Thinkpads. The prototype weighs 2 kgs and can provide about 8 hrs of power (from a single 130 cc fuel cartridge); it also contains a slim lithium ion polymer battery that is charged by the fuel cell as the fuel supplies power to the PC. The fuel cell supplies a maximum of 12 watts of power, the combination of the fuel cell and polymer battery can supply a maximum of 72 watts.
- ❖ CPU: Transmeta – will stop production of processors and focus on engineering services and IP licensing. It has burnt \$650m trying to compete with Intel.

Clients desktop

- ❖ Clients Windows: Windows XP Starter Edition – MS's more reasonably priced/package but limited OS is to be offered in Brazil (it is already offered in Thailand, Malaysia, Indonesia, Russia, and India) to try and slow migration to opensource alternatives (i.e. Linux). It is to be sold with HW it is specifically designed to run on (i.e. not as a packaged product) but is unfortunately limited e.g. no printer sharing, only a single user account, only 3 applications can run at once.

Platform – servers

Servers

- ❖ Virtualisation: AMD Pacifica – is a virtualization technology for use on server and desktop processors that allows multiple operating systems and applications to run in independent partitions on a single processor. It is designed to work in conjunction with other virtualisation SW from MS, VMware, XenSource etc.
- ❖ Servers: Sun Galaxy – road map is said to include two entry-level servers (up to 16Gb memory): a 1U dual-processor server with 2xhard drives and 2xPCI-X slots, and a larger 2U system with 4xhard drives and 5xPCI-X slots. There are also two 4U servers with quad/oct-processors.

Platform – utilities, storage, networking, management and security

Storage

- ❖ Storage: Hitachi Perpendicular – will sell disk drives based on perpendicular recording to enable 1TB desktop drives or 20GB Microdrives in 2007. This year Hitachi will sell a 2.5in 100GB drive and Toshiba will sell 1.8in 80GB drives.

- ❖ Storage: Iomega NAS 200d/NAS 300r/Rev 35GB – NAS 200d Server provides 320GB of storage with integrated backup to the Rev removable-drive system; NAS 300r provides 500Gb. The Rev 35GB SATA drive provides 35GB of storage on removable hard disks. The 200d Series start at \$1.4k and the 300r Series start at \$2k. The Rev 35GB Internal Drive with SATA interface is \$380.



Governance and quality – Standards

Data & metadata

- ❖ Content: AIIM iECM – is a project to develop a SOA framework for interoperable Enterprise Content Management.

