



Environment

Reporting (quarterly)

- ❖ SAP reports: net income of €254m – SW revenue was €434m (up 17%) with ERP SW revenue of €174m and SCM revenue of €88m.
- ❖ Nokia reports: net profit of €863m on sales of €7.4b – It shipped 53m units and they sold for an average of €110. The fastest growing regions were GSM markets: China, AsiaPac and EMEA (Europe, Middle East, and Africa). Nokia's market is 32%. The company predicts 740m units will be sold in 2005.
- ❖ Motorola reports: income of \$692m – on sales of \$8.2b. It shipped 28.7m units
- ❖ Amazon reports: revenue of \$1.9b (up 24%) – and net income of \$78m (down from \$111m)

Industry and economy

- ❖ Consolidation presentation: Adobe buys Macromedia – for \$3.4b to create a combined entity with revenue of about \$2b. Macromedia has 30+ products (content authoring/serving/playing and e-learning) and Adobe has 40+ products (publishing; digital imaging; video/audio; Acrobat family etc.).
- ❖ Consolidation tools: Telelogic buys Popkin – Telelogic is based in Sweden, operates in 17 countries, has a requirements management tool (DOORS), a tool for design, implementation & testing (TAU), and a tool for configuration management (SYNERGY). Popkin has an old CASE oriented EA tool (that is very widely used). While popular, Popkin is based on old templates and architectures, and struggles to compete with informed audiences against the new class of EA tools (e.g. true metamodelers with advanced EA governance capabilities). Popkin's revenue for 2004 was \$19m (up only 28% in a market that is growing rapidly). Popkin has 108 people (65 in the US, 37 in the UK and 3 in the Netherlands). [we evaluated Popkin on and off for many years - but it didn't make our short list]
- ❖ Consolidation tools: Troux bought Metis – To create one of the most comprehensive EA governance suites available – supporting all frameworks (e.g. from Cobit to ITIL, and from Zachman to TOGAF etc.) and key languages (e.g. UML, BPM etc.). It provides excellent EA visualisation for modellers and forms accessible, highly scaleable repositories (ITIL CMDBs etc.) for management and query. Meta described it as 'Match Made in Heaven ... Troux, an IT governance (asset/inventory infrastructure management) solution with a repository and Metis, a comprehensive EA modelling tool with a repository; bring together good current state documentation with first-rate future state design to help balance out the plan component of the "plan-->build-->run model"'. Gartner says '.. Troux and Computas complement each other. Troux's strengths include detecting and synthesizing IT architecture information from a wide range of operational sources. Computas has better visualization capabilities and can represent models in a broad range of notations. Computas also has more extensive support for the business and design aspects of the architecture. This deal could produce a highly visionary enterprise architecture tool.' Forrester says '[this] sets the stage for a best-of-breed enterprise architecture tool'. [I am of course biased having selected Metis].
- ❖ Consolidation Telcos: Qwest tries to buy – MCI for about \$9.9b.
- ❖ Value of Web Advertising: DoubleClick is bought for \$1.1b – and the value of advertising on the Web hits an all time high.

Online services

Consumer on-line services

- ❖ Collaboration service: Vodafone wireless push e-mail – will be released after trials in Spain, Germany, Italy, Greece, France and Finland. In Spain, the price of 8Mb of email (say 800 10k text emails) is €15 a month. It supports MS Exchange server and IBM Domino servers as well as POP3. Attachments in formats such as MS Office (Word, Excel, PPT) and PDF can also be downloaded. [Cf. RIM]

- ❖ Collaboration service: SkypeIn and voice mail – SkypeIn allows online Skype users to reach Skype users with ordinary fixed or mobile phones and is available in: Denmark, Finland, France, Hong Kong, Norway, Sweden, the UK, and the US. A three-month subscription costs €10 and a full year subscription €30. The voicemail offering is available as part of the SkypeIn subscription or it can be purchased separately for €5 for three months and €15 for a full year. The company is also planning a video conferencing service. More than 100 million copies of Skype software have been downloaded from the Internet and the company claims 35 million registered users.

Business on-line services

- ❖ Collaboration service: Verizon iobi – allows enterprise users to get calls, e-mails and IM through a single Web-based portal. It is aimed at Centrex users.

Business services, management, product services and intelligence

Business services

- ❖ Ticketing: T-Systems VDV systems – a RFID smart card allows passengers to pass by a card reader without having to swipe or insert their cards into the device.
- ❖ Social sector services: SAP KMD – agree to develop standard SW for social services and social security processes in the public sector based on SAPs CRM/ERP products. [Cf. SAP & IBM partnership in the social services and social security marketplace]

Business tools – produce, collaborate, organise knowledge

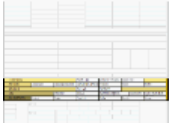
Productivity

- ❖ Open tools: OpenOffice 2.0 – has many changes e.g. new installation procedures, revised UI e.g. toolbars (pop open as required and all toolbars can now be torn off to form floating windows or docked) and is now imitative of MS Office 2003 (often being worse off for this); it has digital signatures and a movie player; Draw has more flow chart elements; Writer tables have been improved (e.g. nesting); scripting languages is Beanshell. It provides excellent for standards, is portable and is free and provides a viable alternative to MS Office. It is in beta and due for release in July. OpenOffice has a customizable XSLT stylesheet that can be used to generate XHTML from any word processing document (though for practical use templates are key to enable authors to work with a set of styles that will map to XHTML).

Collaborate

- ❖ Collaboration: MS Office Communicator – will extend its IM to mobile devices (e.g. phones) and be available later in 2005. It tracks users to see if they are online and allows them to swap text messages between phones or between a cell phone and a PC. MS LCS will provide access to IM from mobile devices. A client front end to LCS will run on Windows Mobile (Pocket PC, Pocket PC Phone, Smartphone) and will be based on LCS MS Office Communicator 2005 (PC-based client). About half of all enterprise users currently use IM and eventually it will be as essential as email.
- ❖ Collaboration: Lotus work on RIM – will make Lotus IM (and in future other Lotus collaboration services) available on BlackBerries. RIM has a similar agreement with MS.
- ❖ Collaboration: AIM Triton – will soon have a new UI and code architecture. A beta version (code-named Triton) is available for free download now. It will provide better support for simultaneous IM sessions, offer multiparty voice chat, and tools for identifying SPAM IM

- ❖ Collaboration: Directions – the market is still consolidating and we expect to see increasingly integrated/powerful products from the major camps (MS and IBM leading); opensource offerings (e.g. from Novell et al); and point solutions from service providers e.g. Google (Search), Skype (VoIP), AOL (ISP) etc. While Groove will probably not be fully integrated with MS office for a few years (Office 12), it does provide MS with a proven collaboration tool (filling the gaps between Outlook and Office), complementing MS server offerings (e.g. Exchange, LCS, SharePoint etc) and is consistent with MS's fat/wide client architecture (locking people into Windows clients). Areas where overlaps may need to be resolved include: IM (Office Communicator, LCS, Live Meeting); document management (Office SharePoint Portal Server, Windows SharePoint Services); Forms tools (InfoPath); documentation (Office One Notes) and to a lesser extent project management (MS Project) and middleware (Biztalk etc.). IBM's Workplace product will provide team collaboration solutions that offer the breadth of offering and understanding of the domain that comes from Lotus, but doesn't require the Notes client (which many people dislike). They should be able to provide a complete solution for Linux/Java environments (clients and servers) where opensource products (e.g. OpenOffice) can fill object/content production roles. [RHE's experiments with Groove lead us to conclude that it did not offer a compelling functional advantage over the Lotus products, and that Lotus's drive to thin open clients and a server centric model would provide us good solution to our needs for geographically distributed, and often mobile, collaboration) and not lock us in irrevocably to the MS client architecture e.g. IE/Windows etc.]



Software infrastructures

Presentation & integration

- ❖ Presentation: IE 7 – will have improved support for CSS and PNG.(e.g. transparent images and overlays). The other major browsers provide better support for these standards. It is unclear if it will have other advanced features that the better browsers have had for some time e.g. tabbed browsing, news aggregator etc.
- ❖ Presentation: MS Metro – the next version of Windows will include a new XML-based document format (code-named Metro) to print (printers can be enabled with Metro interpreters) and share documents [Cf. PDF/PostScript].
- ❖ Presentation: Adobe Macromedia – Together they should be able to provide a fairly comprehensive multimedia presentation architecture that will operate in open environments e.g. Acrobat eForms, Flash etc. (competing with MS and their MS environment oriented approach).

Language & other

- ❖ Stacks Java: JES R3 – supports HP-UX and Windows and costs \$140 per employee. JES includes: application server (supporting J2EE 1.4), directory server, portal server, identity server etc., Java Studio Enterprise and Java Studio Creator.

Service & process

- ❖ SOA: SOA Software – is offering its Registry product (UDDI) for free for a limited time.
- ❖ SOA: WebSphere MQ v6 – allows creation of an ESB from a single Eclipse-based workbench. IBM has also improved MQ integration with the application infrastructure capabilities found in the latest release of CICS and WebSphere Application Server for the mainframe.
- ❖ SOA: WebMethods v6.5 – is for the integration of disparate systems BP's are automated by, and for the monitoring of these BPs. Smart Services offers standards-based components that can be linked to form new BPs and applications. Smart Processes reports business metrics to optimize business operations in real time. WebMethods Fabric 6.5 has an average price per installation of \$550k.
- ❖ SOA: Jacada Fusion 2.0 – is a platform for delivering process-centric composite applications. It has a WS layer, SOA capabilities, and supports composite application development. Jacada Fusion 2.0 pricing starts at \$50k.
- ❖ SOA: Systinet GIF – is a Governance Interoperability Framework to make it easier to manage SOAs that publish services in the Systinet Business Services Registry.

Data & metadata

- ❖ Databases: 2004 Marketshares – Oracle 41%, IBM 31%, MS 13% of the \$15b market. MySQL doesn't show well in marketshare analysis because of its low cost. In a couple of years open-source databases will be an accepted standard for most applications with within the enterprise in most organisations (i.e. those with less than 1000 people).
- ❖ Database: MySQL 5.1 Cluster – will have improvements (tables/scale, replication, partitioning, column indexing, variable length record management) and is due in 2006.
- ❖ Database: MySQL migration suite – is a beta version of a tool for migrating to MySQL (e.g. from Oracle, MS Access and in future DB2, Sybase etc.)
- ❖ Object/relational: JSR-220 ORM – Eclipse project from Versant for standards-based object-relational mapping based on JSR 220. Versant will use Open Access as an open source OR mapping tool (for mapping EJB 3.0 and the JDO 2.). [Cf. Oracle's proposal]

Implementation

- ❖ BP: BEA partners with ProActivity – to provide excellent BP modelling and simulation as a precursor to development for BEA BPEL technologies. [I am again biased having selected ProActivity for dedicated BP modelling]
- ❖ IDE: PowerBasic – offers VB developers special discount pricing on select PowerBasic tools.

Platform – clients

Clients mobile

- ❖ Storage mobile: Samsung Flash Disk – shows a prototype hard disk drive that includes flash memory to reduce power consumption on mobile devices. When the flash memory is full, the hard disk drive is spun up and the data is written to disk. The prototype has 128MB of flash memory.

Clients desktop

- ❖ Thin Client: Windows XP based Eiger/Monch – will offer a thin client platform base with fat client management technologies.
- ❖ Laptops: Libretto U100 – is 210x165x30mm, 999 grams, has a 1.2GHz Pentium M, and a 180mm WXGA screen, 512MB and a 60GB drive, IEEE802.11b/g wireless LAN, Bluetooth Version 2.0, a fingerprint scanner and is \$2k.
- ❖ Storage laptops: Fujitsu 200GB – 62.5mm disks using perpendicular recording.

Platform – servers

Servers

- ❖ Linux in banking: ICBC – China's biggest bank will deploy Linux (Turbolinux) on servers across its network of 20,000 national branches. Bank of China has deployed Linux distributions for use in regional projects. Agricultural Bank of China and China Construction Bank are expected to follow suit, meaning all four of China's largest banks will run Linux.

Platform – utilities, storage, networking, management and security

Utilities

- ❖ Virtualisation: Softricity ZeroTouch – allows desktop users to gain access to Windows applications via an on-demand model from local or remote locations. It contains a workflow capability that controls the authorization chain of command for allocating applications and works with the SoftGrid application virtualization technology. SoftGrid is designed to make sure any software being provisioned does not conflict with other applications by using a thin virtualization layer running on each PC to isolate virtualized applications from the underlying workstation OS and from each other.
- ❖ Virtualisation: MS Windows to have Virtualisation – MS will build virtualization capabilities directly into Windows and plans to adopt an architecture similar to the one VMware uses.
- ❖ NW Service: Sprint Personal Media – will offer remote access to media (video, audio, images, and live TV if the PC has a tuner) stored on home PCs (running XP) from a Web browser (i.e. on PCs, PDAs, Phones).

Network

- ❖ WiMax: Intel Rosedale – starts volume shipments

Systems and network management

- ❖ Storage: Veritas v6.0 – NetBackup v6.0 will support discovery and retrieval of snapshot copies of data stored on a mix of platforms (Network Appliance, EMC, HDS etc.). Enterprise Vault 6.0 will support collaboration tools (Lotus Domino and MS SharePoint Portal Server)
- ❖ Security mobile: McAfee Desktop Firewall 8.5 – checks whether a user's connection meets certain criteria, such as accepted gateway IP addresses, before it will let the user connect to the enterprise network. A number of antivirus vendors have been releasing products to guard against infections from mobile clients.
- ❖ Management: MS System Center – will be a brand not a product. MS MOM and SMS will remain stand-alone products and will be supplemented by a tool called System Center Reporting. System Center will also include: Data Protection Manager (a diskless backup and recovery server) and a capacity planning tool (currently code-named Indy)



Governance and quality – Standards

Service & process

- ❖ WS-RM: MS, IBM, BEA & Tibco – submit a new version of spec (first proposed in Q1 03) with protocol and policy assertions.

