

*Internal industry update – week ending: 05-05-12 [#122]*



## Environment

### *Reporting (quarterly)*

- ❖ NTT DoCoMo's revenue: dropped for the first time ever – Revenue for the year was \$45b (down 4%); the average monthly revenue collected from each user was down about 8% to \$70. The company expects 3G subscribers to make up nearly half of the subscriber base (of 51m) in a year. As the mobile market matures, the Telcos will have to generate revenue from upstream services that leverage off their natural strengths (large, trusted, secure, operationally efficient, consumer oriented).
- ❖ Cisco: reports net income – of \$1.5b and revenue of \$6.2b.

### *Industry and economy*

- ❖ SOA: BT picks MS CSF – BT selects MS's CSF framework (in preference to BEA's tools). It is an SOA-based service-delivery platform that functions as an extension of BizTalk Server, SQL Server, and Windows Server, and provides tools and components for service providers wanting to bundle services for a variety of devices (e.g. PCs, PDAs, mobile phones)
- ❖ Stack sedimentation: Sun buys Tarantella – for its Global Desktop software, to make it possible to deliver access to enterprise applications over the Web.
- ❖ Stack sedimentation: Novell buys Immunix – Immunix was founded in 1998 with DARPA money to develop security software for Linux.
- ❖ ScanSoft: buys Nuance for \$220m – ScanSoft makes digital document management and speech software and Nuance makes speech recognition software (together they control 77% of the market for speech server systems).

## Online services

### *Consumer on-line services*

- ❖ Collaboration: Shanghai MSN Network Communications Technology Company – MS partners with Shanghai Alliance Investment to launch an MSN China portal. They will focus on the 340m mobile phone users (as well as PC users).
- ❖ Google: buys Dodgeball.com – a social networking service.

## Business services, management, product services and intelligence

### *Business services*

- ❖ Vertical: Health, Automotive, Education – IBM will bundle open-source technology with open standards and will release IBM patents to go after verticals and to enhance its services opportunities
- ❖ Health: Home monitoring – a suite of home-based medical devices that monitor patients remotely are starting to be more widely used. Health Hero Network has devices oriented at weight loss and InforMedix has a device oriented at taking pills correctly. In the US, 50,000 people with severe chronic diseases (e.g. diabetes, congestive heart failure, hypertension and breathing difficulties) had remote monitoring devices in their homes in 2003.

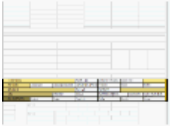
### *Business intelligence*

- ❖ MS: Maestro – is a BI application that allows enterprise users to access scorecards on the desktop to measure performance against metrics. It gathers data from SQL Server, Reporting Services and Analysis Services, and serves it to users through Microsoft SharePoint portal server, exposing some of the functionality through Excel

## Business tools – produce, collaborate, organise knowledge

### *Produce*

- ❖ Content: Interwoven and MS – Interwoven announces an alliance with MS. The WorkSite content management suite will be integrated with SharePoint portal and Interwoven will adopt SQL Server 2005.



## Software infrastructures

### *Presentation & integration*

- ❖ Web Browser: IBM encourages internal use of Firefox – It is already used by about 10% of IBM's staff. [RHE has always recommended Mozilla/Netscape-based browsers - and has never recommended IE for general internal use]

### *Language & other*

- ❖ Java Open-source: Apache Project Harmony – will create an open-source version of Java (J2SE) on the desktop. A Java VM, related libraries, and testing SW would be available under the Apache open-source license.
- ❖ Stacks light/heavy: IBM buys Gluecode – Gluecode only set up about a year ago and has 18 employees. IBM sees Geronimo as a way to sell to organisations who want inexpensive lightweight technologies, as opposed to the traditional large enterprise customers of Websphere (which is heavyweight, complex, sophisticated, legacy-oriented and relatively expensive). It allows IBM to attack MS from below as well as from above. IBM is making a plug-in for Eclipse that will allow Eclipse developers to create applications that work with both Apache and Geronimo.

### *Service & process*

- ❖ SOA: Systinet Developer 5.5 – is a free Eclipse-based download for creating, debugging, compliance testing and deploying WS. It is a companion product to the Systinet Server for Java 5.5 (Systinet's run-time environment). Eclipse Systinet Developer 5.5 supports: WS-ReliableMessaging, checks for WS-I Basic Profile compliance, and publishes to a UDDI compliant registry.

### *Identity & location*

- ❖ Identity Federated: Tivoli Federated Identity Manager – can securely link employees and their customers to third-party organizations without the need to create another user ID and password or to re-authenticate existing users. It complies with federated identity standards from Liberty, SAML, WS-Federation, and WS-Trust.
- ❖ Identity: Federated – key members of the federated identity spec (e.g. OASIS, Liberty, and the IBM/MS led WS-\*) are trying to achieve convergence. [I would not hold my breath. IBM & MS are past masters of standards derailment and hi-jacking to protect their multifarious vested interests]
- ❖ Biometrics: Telesis fingerprint – will roll out a fingerprint-based network and systems access technology in its branches. It is integrated with MS's Active Directory for network access; fingerprint profiles are encrypted and stored directly in Active Directory.
- ❖ Biometrics: Marriott Vocent – Marriott is using voice authentication technology to reset the passwords that enable access to its intranet, Active Directory service, and several non-proprietary applications, according to AI Sample, senior vice president of client services. They capture a voiceprint through a one-time registration of their 40,000 users.

### *Data & metadata*

- ❖ Content: Apache Lenya – is an open source Java/XML content management system (based on Apache Cocoon) with revision control, site management, scheduling, search, WYSIWYG editors and workflow. The Apache Lenya authoring area is used to edit individual pages. The author browses through the authoring area just like a visitor to a Web site would; a menu at the top of the screen is the only indication that you are inside the authoring environment. The site management allows operations that concern multiple pages (moving, renaming sections of the site). Lenya comes with the Bitflux Editor, which allows arbitrary editing of XML in WYSIWYG and validating of documents against a Relax NG schema while they are being edited.

### *Implementation*

- ❖ IDE: NetBeans 4.1 – has improvements in support for J2EE and mobile applications; enhancements to make it easier to use (e.g. Wizards); automated deployment and debugging support for the WebLogic, WebSphere, JBoss and SUN App Server.

## Platform – clients

### *Clients mobile*

- ❖ Phones/PDAs: Windows Mobile 5.0 – devices are scheduled to come to market over the next couple of months. Enhancements include support for hard disks, additional wireless NW types (3G, Wi-Fi, push-to-talk), persistent storage, more buttons, landscape display, QWERTY keyboards, updated versions of mobile Office (Excel, Word, PowerPoint), VPN support, and Bluetooth authorization. The new Visual Studio suite and new APIs (e.g. camera) built into Windows Mobile will provide new opportunities for developers. The new version of ActiveSync will incorporate push wireless e-mail functionality with Exchange Server 2003. Dell will offer upgrades for its handhelds (Axim X50s) as will HP (iPAQ hx2100, hx2400, hx2700, hx4700). Gates says "The whole mobile space is incredibly hot...". Last quarter, Apple sold 5 million iPods (and has 2/3rd of the market). MS is working with partners (e.g. Samsung) to provide its Windows smart-phone to 40 handset makers and Gates sees mobile phones overtaking MP3 players (e.g. iPods) as the top choice among portable music players. RIM has sold 3m BlackBerry devices but Gates sees Windows smart-phones being cheaper and better.
- ❖ Notebooks: Sony Vaio T-Series – notebooks will use Sony's SmartWi technology to toggle between WLAN, WWAN and Bluetooth connections. Available in June, they will start at \$2.2k, weigh 1.4kg, use Pentium M Ultra LV CPU, and have 512 MB memory, a 60GB drive, a 260mm widescreen display, and a DVD+/-RW drive.
- ❖ Storage for notebooks: 62.5mm 100GB notebook drives – are now shipping from Hitachi and Fujitsu.

### *Clients desktop*

- ❖ OS: Eiger – based on a cut-down version of Windows XP Pro/SP2; it can run on a system with a Pentium II, 128MB of RAM and a 500MB drive. MS aims to get people to buy multiple copies of an OS for a single device (effectively doubling OS revenue per device). Business users are starting to recognise that this often doesn't make business sense - because a new heavy weight OS (designed for a different generation of HW) makes an old device too slow and the business tasks the device was bought for (e.g. word processing, Web access, legacy system access) have not essentially changed (and are being achieved by the old device). MS also want to ensure close coupling between their clients and servers. Eiger is an excellent solution from MS's perspective. It allows use of MS's proprietary server-base tools for identity, services management, etc. (e.g. Active Directory and Group Policy Management) and requires the applications to be accessed from a Windows server (i.e. it won't run Office or line-of-business applications locally).

### *Clients input/output, other*

- ❖ Storage: Toshiba HD-DVD – prototype has a capacity of 45GB (just under the 50GB offered by a dual-layer Blu-ray Disc). HD-DVD players and content should be available at the end of this year. Blu-ray devices are not due until next year.
- ❖ Printers: Epson Stylus Photo R2400 – a desktop high res (5,760x1,440 dpi), large format (330x482mm) printer. It costs \$850. The desktop Epson Stylus Pro 4800, 7800, 9800 accommodate paper rolls of 430m, 610mm and 1100mm, respectively. The 4800 is \$2k, the 7800 is \$3k and the 9800 is \$5k.

## Platform – utilities, storage, networking, management and security

### *Storage*

- ❖ SAN: IBM TotalStorage DS4800 – has a capacity of 67TB, two Ethernet ports and new failover software. It will cost \$54k. The IBM TotalStorage SAN Volume Controller V2.1.1 is also available, starting at \$44,500.
- ❖ Storage: HP NAS and Tape library – The new HP StorageWorks Enterprise File Services Clustered Gateway is based on a clustered file system that can expand to 8.2 petabytes of storage. HP StorageWorks 6000 Virtual Library System is based on the HP StorageWorks Modular Smart Array and can emulate 16 separate libraries and 64 virtual drives or 64 server connections.

*Network*

- ❖ NW: JAL Pacific – start offering in-flight Internet services on flights between Tokyo and New York. It costs \$30 for the flight, \$10 for 30 minutes, or 25 cents a minute.
- ❖ WiMax: Sprint work with Intel – on IEEE 802.16e spec (due in products in 07/08).

*Systems and network management*

- ❖ Insecurity: Windows OneCare – MS is now looking to turn the insecure technologies it has architected into a revenue opportunity with new consumer security products (virus/spyware protection, firewall etc.). This should be more profitable than fixing the architecture and doesn't risk dispelling the illusion that insecurity is unavoidable (i.e. and that their technology architecture is not really the problem).



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## Governance and quality

*Development and delivery*

- ❖ Reuse: Reusability isn't about technology – but is a result of careful analysis and design and use of techniques such as: generalization, specialization, refactoring, repurposing. When considering the development of generic code (e.g. frameworks), it is unwise to invest much effort in generalisation based on a single instance (i.e. of development), because the additional cost/complexity militates against successful delivery (cost effective, on time, budget etc.) and the quality of the generalisation is usually poor (because it is based on circumstantial inference). Usually it is best to wait until material inference can be applied (formal inference is seldom applicable).
- ❖ SOA: OASIS Reference Model – is an abstract framework for understanding significant entities and relationships amongst them within a SO environment, and for the development of consistent standards or specifications supporting that environment [it references CBDi material as a key source; the CBDi materials we have probably provide a more digestible source for most people than the raw OASIS materials]



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## Governance and quality – Standards

*Clients mobile*

- ❖ Mobile: W3C launches a new Mobile Web Initiative (MWI) – to make Web access from a mobile device as simple, easy and convenient as Web access from a desktop device. Two new W3C Working Groups have been formed to support MWI. The Mobile Web Best Practices (MWBP) WG will develop a set of technical best practices supporting development of Web sites. The MWI Device Description Working Group (DDWG) is to develop a consistent way of describing devices.