



Environment

Reporting (quarterly)

- ❖ HP: reports revenue – of \$21.6b (up 7%) and net income of \$1.2b. The new CEO's challenge is to come up with a clear strategic focus.
- ❖ BT: net profit – rose faster than revenue; its new wave services (ICT, broadband and mobility) are now contributing 28% of revenue. BT expects growth in its global services following the recent acquisition of three other network operators: Albacom (of Italy), Infonet Services Corp. and Radianz.

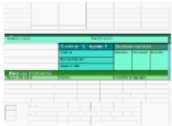
Industry and economy

- ❖ Sears, Roebuck: dumps CSC – Sears ends its \$1.6b IT outsourcing agreement with CSC citing "failure to perform certain of its obligations ..."

Online services

Business on-line services

- ❖ Location-based services: Sprint Business Mobility Framework – is a service to help businesses locate, track, and direct mobile workers via wireless text and voice messages from Sprint/MS. MS contribute its MapPoint Location Server SW. Early users are trucking/delivery firms. Sprint can locate a device at 5-300m, based on GPS and cell tower triangulation.
- ❖ Workflow services: Nsite 4.5 – a bidirectional quote-to-fulfillment WS that will plug in to hosted CRM applications (e.g. Siebel OnDemand, Salesforce.com). The Nsite 4.5 module costs \$20 per user, per month.



Business services, management, product services and intelligence

Business management

- ❖ ERP: Lawson uses IBM SOA stack – based on IBM's WebSphere middleware. The major camps (e.g. IBM, Oracle, MS and SAP) are all pushing their own SOA stacks.

Business services

- ❖ Health: patient identification using RFID – Fujitsu/Siemens launch a pilot project where patient's wristbands have an RFID chip that can be read using a tablet PC/PDA. The patients taking part in the pilot project can call up their own medical information (including blood pressure levels, weight, and treatment or discharge dates) via an information terminal, and can also find out about the diagnosed condition and standard treatments.
- ❖ Finance: Call Report Modernization Project – The Federal Financial Institution Examination Council is to launch the project, which will enable banking regulators and the public to access a common pool of information about the banks under the Council's supervision. A Central Data Repository containing the quarterly regulatory filings of over 8,400 financial institutions will contain the information, which will be tagged using XBRL. A 10-year, \$39m contract was awarded in 2003 to Unisys, MS, PwC, IDOM, EDGAR Online, UBMatrix, and V-Tech to design, build-out and manage the system.



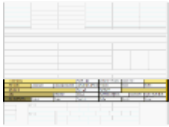
Business tools – produce, collaborate, organise knowledge

Collaborate

- ❖ Collaboration: Open Text Livelink Touchpoint – allows easy access to people and places. Dragging a file from your desktop to the IM conversation opens Things (a persistent, shared work space); Instant meetings occur in this team work space. The secure shared space performs in a way that is similar to that of a local desktop folder, although it resides on the Open Text servers. Touchpoint integrates with the company's enterprise content management, knowledge management, records management, and workflow products.

Organise

- ❖ Search: Google Desktop Search for the Enterprise – available for free download. The consumer-oriented tool has been available for about 8 months [and works well]. The Enterprise product has installation, distribution, management and security features for IT departments to use when rolling out and configuring the product for their users and it can index e-mail messages from a Lotus Notes platform. [Cf. X1, Autonomy, MS's enterprise desktop search tool]
- ❖ Search: MSN Search Toolbar – is now released as MS focus on competing with Google.



Software infrastructures

Presentation & integration

- ❖ Browser: Firefox 10% – Firefox has 10% of the browser market and its share is still growing (Firefox/Mozilla have 14%).
- ❖ Browser: Netscape 8.0 – is released. It is based on Firefox but it will also adapt and properly present sites customized to work with MS's IE.
- ❖ Avatars: Oddcast VHost Flash – Oddcast will be developing applications for cell phones using Flash. The talking VHost avatar will be designed for concierge services (e.g. weather, sports/news, horoscopes, nearest restaurant). Nokia's Series 60 phones (20m have been sold) will incorporate Flash.
- ❖ PC presentation framework: MS Office 12 – due in about 18 months. It focuses on areas such as collaboration (easier to set up/use shared workspaces in SharePoint, p2p using Groove technologies), BI (data visualization for real time dashboards and scorecards with Excel), content lifecycle and better XML support for InfoPath forms.

Language & other

- ❖ Open Stacks: Red Flag may bundle Sun JRE/NetBeans – to ship an entire solution for developers within one packaging,

Service & process

- ❖ SOA: BEA Project Free Flow – is intended to enable free flow of information across BP using the company's new ESB (QuickSilver), WebLogic Enterprise Security, and Liquid Data. Last quarter, BEA's license revenue was down 4% (to \$116m) and its services revenue increased (\$166m); BEA can't afford to sustain a high PE as a services business.
- ❖ SOA Management: Actional Looking Glass and SOAPstation 5.5 – are the next version of Actional's WS management platform. The upgrades include expanded security features for identity and access management, both at the perimeter and inside a firewall.
- ❖ SOA: iWay Adaptive SOA Framework – a collection of existing and new tools (Adapter Manager, Application Explorer, Adapter Designer, Adapter Transformer, and the new Trading Manager) rebranded for SOAs (i.e. where applications are exposed as WS). Adapter Manager (a run-time engine built on a service bus supporting multiple protocols, e.g. HTTP, TCP/IP, Sonic MQ, etc.) controls service interactions among iWay's adapters. Application Explorer enables users to locate services within applications as WS and generate schemas for transactions or generate WSDL. Adapter Designer is used to define processes so they can be exposed (e.g. via JCA, WS or other messaging interfaces). The Adapter Transformer maps messages from one format to another. Trading Manager is a business-to-business partner agreement manager that correlates documents and transactions across trading partner and service channels.
- ❖ BP: Plumtree Process Server – Plumtree re-brands and integrates the FuegoBPM with the Plumtree line of products.

Identity & location

- ❖ Authentication: Fujitsu palm-vein biometric security system – will be sold outside Japan this year. It has been available in Japan since the middle of last year. Fujitsu says it provides better security than competing technologies, including voice print, facial recognition, fingerprint recognition and iris scan. It will incorrectly reject an authorized user about once every 10,000 scans and incorrectly accept an unauthorized user about once every 1.25 million scans (vs. once every 100,000 scans for fingerprint sensors). The sensors are currently 70x70mm, but will shrink to 30x30mm. It has been used by banks and hospitals.

Data & metadata

- ❖ XML Datastore: IBM Viper release of DB2 – will allow data to be queried via SQL or Xquery statements. The products from the major camps (IBM, Oracle, MS etc.) treat XML data (which is hierarchical) as if it was relational (e.g. a table). Viper will have a native XML data store. Most (80-85%) corporate data is not tabular.
- ❖ EII: Ipdeor XIP 4.0 – Extensible Information Platform is an EII offering that works with both SQL and XQuery. XIP 4.0 supports Business Objects XI and Crystal Reports XI, a visual rules GUI (to create rules based on data values e.g. alerts when detailed analysis is appropriate), WS publishing, and the dual querying engines. [Cf EII products from: IBM, Composite, MetaMatrix and Callixa]

Implementation

- ❖ Zero G: InstallAnywhere 7 – a multiplatform software deployment solution.

Platform – clients

Clients mobile

- ❖ PDA: palmOne LifeDrive Mobile Manager – has a 25mm 4GB hard drive and can synchronize entire directories of data, pictures, and video between desktops and the device via Wi-Fi, Bluetooth, or USB 2.0, but it still lacks a keyboard and cell phone.
- ❖ Phones: Nokia WS Series 60 – Nokia will build support for WS into all its smartphones by the end of the year.
- ❖ Mobile OS: Windows Mobile 5.0 – is released but does not yet have push e-mail (until the next service pack for Exchange 2003)

Platform – servers

Servers

- ❖ Servers: Nortel, IBM – are to jointly develop networking products for the telecommunications industry. Initially, the focus is on carrier-grade servers for communications providers based on IBM's BladeCenter server design.

Platform – utilities, storage, networking, management and security

Storage

- ❖ Storage virtualisation: EMC Invista – (formerly known as Storage Router) will be able to present arrays on heterogeneous SANs to application servers as if from a single pool of capacity, said Mark Lewis, chief development officer at EMC. The virtualization device will start at \$225k.
- ❖ Storage: Seagate Momentus – starts shipping a 120Gb 62mm drive for the notebook PC market. Hitachi has 34%, Fujitsu 25%, Toshiba 22% and Seagate 11% of the 62mm drive market.

Network

- ❖ NW: Broadband mainstream in homes – US will have 69m homes with broadband in 3 years (2008); broadband homes increased 65% in Europe last year.

Systems and network management

- ❖ Management: MS Windows-based Hosting Version 3.5 – is released. It includes support for recent MS products e.g. MOM 2005, offering an operations console and customized reports, and Windows Server Update Services, which report server status.
- ❖ Management: IBM Tivoli and ITIL – new tools e.g. Change and Release, Availability Management, Information Lifecycle Management, which are designed to coordinate application deployments across software, hardware, storage and network devices; Tivoli Unified Process will help IBM support ITIL.

Governance and quality

Development and delivery

Linux migration: IBM and Red Hat – IBM will offer free migration assessments to Solaris customers who want to know more about the costs/benefits of moving to Red Hat Linux.

- ❖ SOA: IBM Business Integration Adoption Model – aims to sell IBM SW/services with the SOA flavour du-jour banner i.e. to align business goals and BP with underlying applications. The first vertical markets IBM will pursue include the banking and financial sectors, electronics, insurance, government, retail, and manufacturing. The company has released an SOA Integration Framework (SOA patterns, processes) that outlines how to apply IBM's products e.g. Websphere, Rational, and Tivoli.
- ❖ SOA: SUN SOA Path – aims to sell SUN SW/services with the SOA flavour du-jour banner.

Governance and quality – Standards

Collaborate

- ❖ Scheduling: XML iCalendar – Guideline for the use of XML with iCalendar is released i.e. how XML can be used to represent iCalendar objects, how iCalendar namespaces can be used with other XML documents.

Language

- ❖ XML Java: J2SE 7.0 (Dolphin) – may have native XML data support. It would be possible to write XML text into code and then manipulate it without having to write method invocations.

Service & process

- ❖ BPMI.org and WfMC: may merge [and about time] – WfMC push XPD (XML Process Definition Language, a framework for implementing BP management and workflow engine) and Wf-XML; BPMI.org push BPML (for modeling BP), BPMN (to visually describe BP models), and BPQL (for querying business processes). BPMI.org was initiated by Intalio in 2000 (and has 50 members); WfMC was founded in 1993 (has 300 members).

Systems and Network Management

- ❖ Installation: OASIS – plans to develop a standardized spec for expressing software installation characteristics, covering aspects such as software installation, configuration, rollbacks, and updates. IBM's Autonomic Computing group has submitted its own Solution Installation specification as a starting point.