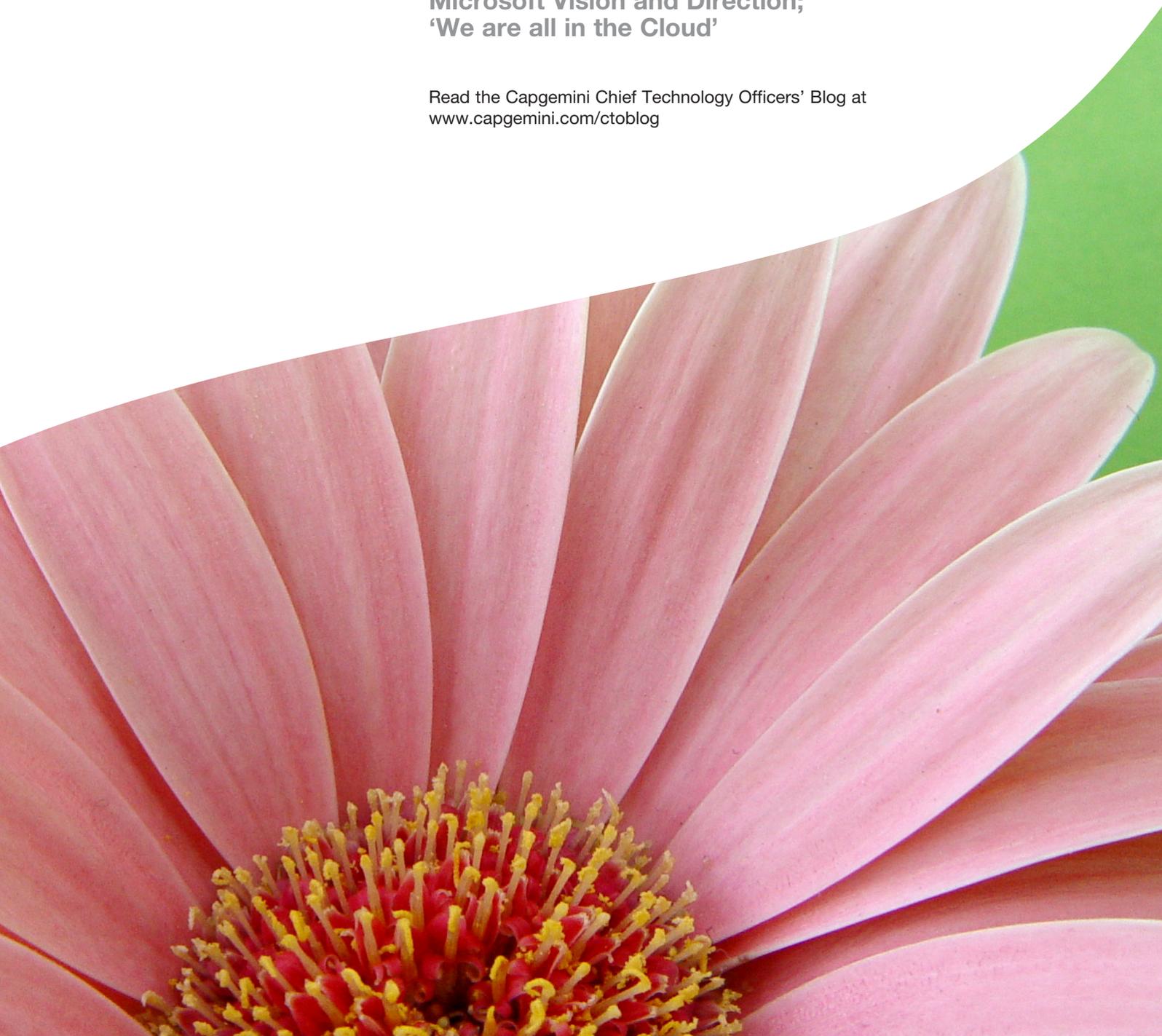


# Changing the Game: Monthly Technology Briefs

November 2010

**Microsoft Vision and Direction;  
'We are all in the Cloud'**

Read the Capgemini Chief Technology Officers' Blog at  
[www.capgemini.com/ctoblog](http://www.capgemini.com/ctoblog)



## **Microsoft Vision and Tag Line; – ‘We are all in the Cloud’**

Microsoft has been describing itself as totally committed to cloud technology. It has been at the center of its vision for some time now with the tag line ‘We’re all in the cloud’ which has a neat pictorial graphic that adorns everything. Microsoft Azure and the addition of a virtualization Hyper Visor for Windows Server were launched last year at the time when product strategies concentrated solely on providing lower cost flexibility from computational resources. A year or so later Microsoft has a complete vision of what cloud technology means to its market, and has filled out its product portfolio accordingly.

This autumn sees Microsoft adding Windows Phone 7.0, releasing the beta of Internet Explorer 9, and launching a new version of the X-Box, called Kinect. All these are part of the same ‘Windows 7 experience’ and complete its vision of how its technology will enable it to compete in a changing market. Before examining the products, and understanding their features and functions, it is necessary to understand the Microsoft view of the market.

Microsoft believes that the ‘consumerization of IT’ is the new changing force, stating that increasingly the expectations are set by the consumer in using the Web and Web Services through a variety of devices. This is feeding through into a clear shift towards people providing their own choice of device in the workplace, starting with mobile phones and moving towards PCs, even the force for the adoption of iPads, and other more specialized devices. Microsoft finds these forces driving its own staff, and in response now allows them the freedom to choose their own devices to use ‘at work’. A great number of these devices will be used to carry out direct work on the Microsoft campus, but the trend is towards an increasing amount of work being carried out off campus and at hours that suit individuals.

This trend is noticeable in all enterprises and leads to a redefinition of the term ‘at work’ which increasingly applies to the activity and not the location. This breakdown of the neat segmentation between work being defined by physical presence at set times using supplied devices on an enterprise site, versus an entirely separate home life lies at the core of the move towards ‘consumerization’ of IT.

It certainly poses new challenges to the enterprise in terms of how it ‘manages’ its ‘enterprise business infrastructure’ that links all of these aspects together. Microsoft itself defines this as the need to securing and policy managing any device, or activity, automatically on first, or subsequent connection, to its business infrastructure, defining the act of connection as defining ‘at work’ regardless of any other aspect. Also inherent in this change is the growth by workers in the use of non-enterprise hosted services to perform some parts of their work i.e. social networks, etc. Microsoft now allows its employees the freedom to use the tools and services that they believe will empower them best, stating that more than 50% of its employees are using one or more externally hosted services when at ‘work’.

In analyzing these shifts in the use of technology for business work as well as private life Microsoft also defines its dual positioning as a player in the consumer market, as well as in the enterprise market, believing this uniquely enables Microsoft to lead in enabling enterprises to make this transition. The Microsoft product strategy is based on delivering a single cohesive experience even though it will be in a variety of formats to suit devices, with features that both the user and the enterprise will find compelling jointly, and separately, in answering their requirements. As such, the Microsoft vision ‘we are all in the cloud’ means that there can only be hybrid environments as the separation of enterprise private internal clouds from public, or industry, clouds, is not possible in such a vision of the market.

Windows 7 and all its aligned product variants is designed to provide a single cohesive architecture for this Microsoft view of the market which has been, and is being created by Web Services and Cloud technology. For the user it means total integration of their personalized profiles on and between any of the five screens that Microsoft supports; Phone; PC; Tablet; Game box and TV. This personalization covers not just consumer based services, but also business tools such as Exchange and SharePoint, as well as integration between both. Windows Phone 7, as an example, provides dual personalities in the same phone between the business side and the private side, but integrates functionality such as diary between the two.

This redefinition of what and how people want to use their devices is seen as a key differentiator by Microsoft against competitors who are either purely focused on consumers with limited enterprise capabilities, or purely focused on enterprises with limited consumer capabilities. It also provides the enterprise with a cohesive architecture in which to both enable, support, and manage work activities regardless of the current barriers and differences that device, location, activity etc provide.

Microsoft offers enterprise IT four clear strategies each of which individually improves its cost, efficiency or effectiveness, as well as collectively changing the enterprise's capability to compete with all its resources aligned in the new market. The four are; Desktop Optimization; Data Center Optimization; Business Productivity; and the Office Cloud. Within each are product sets, and solution templates, to ensure that the cohesive overall aspect is maintained. Collectively these provide an Infrastructure Platform on which new business capabilities – uniquely enabled by the shift to cloud technologies – sit and correspond to the shifting focus of the enterprise from automation of the back office to creating revenues from sales-focused activities in the front office. This is the revolution that Web 2.0 started, moving through Web Services into the creation of the ubiquitous Cloud environment.

Microsoft defines these new business focuses and requirements together with its product solutions to match as being based on six areas; 1) Sales and Services; 2) Digital Marketing; 3) Governance, Risk and Compliance; 4) Innovation Management; 5) Business Insights, and lastly, 6) Operations Management.

The apparently confusing and very, very large Microsoft product catalogue for the enterprise can be understood and applied successfully by using these two, (MIS Infrastructure, and Business Technology), sets of solution definitions. Collectively, with the consumer products and services they deliver the Microsoft vision and tag line;



The impact of this and other technologies is discussed in the [Capgemini CTO Blog](#).

## Leading Company Results (Revenues)

Leading Company Results (Revenues)				
Q4	Apple ↑ 67% @ \$20.3bn			
Q3	Intel ↑ 19% @ \$11.1bn	Google ↑ 23% @ \$7.29bn	IBM ↑ 3% @ \$24.3bn	SAP ↑ 20% @ €2.32bn
Q1	Microsoft ↑ 25% to \$15.2bn			

### Movements by Industry Leaders

**Cisco Borderless Networks suite** now includes a new router that can route between virtual servers as opposed to physical servers. **Cisco Umi provides home video conferencing** on a high definition TV using broadband through an appliance style set top box. [www.cisco.com](http://www.cisco.com)

**Oracle is acquiring Passlogix**, a vendor of single sign on software and an existing provider to Oracle. At an Analysts meeting Oracle said that a customer can **swap out an existing fully paid up Oracle application for its equivalent Fusion App at no extra cost**. It will only charge if numbers of seats or increased functionality is required. **Oracle Clinical Development Analytics and Oracle Life Cycle Sciences Data Hub** has been updated. **Oracle CRM OnDemand R18** is now out with new features. Oracle Sun introduces **SPARC T3 Systems** based on the new 16 core T3 Processors and claimed to offer double the performance of previous T-Series systems. [www.oracle.com](http://www.oracle.com)

**HP P9000 Servers Application Performance Extender** provides a virtualized environment to allow HP-UX to be migrated from older HP machines onto a P9000. HP is now claiming that all its data centers are running on its own **HP networking products** as a proof for its own offerings in the network space. **Ex SAP CEO Leo Apotheker** is to be the new CEO of HP with industry veteran **Ray Lane as chairman**. Self contained data centers in a container will be added as **HP Performance Optimized Datacenter, PODs**, and will be built to order in a special HP facility as the way to simplify fork lift upgrades. **HP ProLiant SL6500 Scalable System Blade Server** can hold a mixture of blades including specialized blades for graphics as well as general purpose. **HP Application Digital Vaccine, AppDV**, has been added to the **TippingPoint Security Suite** and provides filters for Web sites that are not 'business useful' such as file sharing sites. **The Palm Pre 2** is an updated version of the existing model running WebOS 2, claimed by HP to be a significant step in providing a people-oriented operating system with more powerful hardware. [www.hp.com](http://www.hp.com)

**Intel Oak Trail** will be developed for late 2011 to serve the growing market for tablet devices which increasingly are expected to take market share from traditional PCs. **Indian Retailer Croma has partnered with Intel** to place Croma Apps as a pre-loaded software apps store on Intel Atom powered Netbooks as part of the Intel AppUp center. [www.intel.com](http://www.intel.com)

**IBM is acquiring Blade Software**, a specialist in Blade computing server systems, and the associated software to manage and operate Blade based racks. **IBM LotusLive Cloud Collaboration suite** extends the existing LotusLive iNotes offering into a full office package. **IBM Storwize V7000** adds a new mid range storage system with full virtual disk management and capabilities to prioritize real-time data requirements. **IBM Blueworks Live** adds a Software as a Service, SaaS, offering for process management with tools for optimization of the process. **IBM CloudBurst** private cloud capability has now been extended to support Power7 servers. IBM is to **acquire PSS Systems**, a vendor of automation and analysis of governance management policies. IBM is also **acquiring Clarity**, a vendor of software to automate collecting and filing financial statements. **IBM Smart Business Development and Test Cloud based services** now has extended support for Windows. [www.ibm.com](http://www.ibm.com)

**Microsoft Windows Mobile 7** is now formally launched with phones, arriving in time for Christmas. **Microsoft Dynamics CRM Online Update** adds online promotion and new retail capabilities. Industry veteran and innovator **Ray Ozzie is to leave the role of Chief Software Architect** in a move to wind down to retirement. **Office 365 provides all the elements of Office** for a monthly subscription under the Microsoft Software plus Service model delivered as Web services hosted on a cloud. [www.microsoft.com](http://www.microsoft.com)

**SAP Business By Design suite** is extended to include delivery on Apple iPhone, and iPod products. **SAP Community Network** is to offer code exchange between members. **SAP NetWeaver 7.3 Technology Platform** update supports the integration and cross functions between business apps, mobility, data, processes and non-SAP functions. **SAP Sourcing OnDemand Wave 7** update supports more contractual flexibility and options to add and change solutions. **SAP Business ByDesign App for iPhone** is a new move to allow clients to buy through the Apple App Store. **SAP and Siemens** will work together to develop support capabilities for the mass adoption of electric cars covering smart metering, and other aligned topics. [www.sap.com](http://www.sap.com)

**Google Frame Plug-in for HTML5** has been added to the other Google Frame services and allows Microsoft Internet Explorer Browser versions 6, 7 and 8 to use HTML5 Web pages. Google CEO Eric Schmidt's **vision is for an augment version of humanity** where humans are supported by computers where they need help and humans help computers where they need help. **Google 411 voice operated search service** is to be closed. **Google Analytics** can now be published embedded in a Web page using its new In-Page Analytics tool. **Google Search Appliance has been updated** to search both externally and internally with particular reference to the services that an enterprise may be using from a cloud services source. [www.google.com](http://www.google.com)

**Apple MacBook Air** is claimed to be the first of a new generation of notebooks designed to work to cloud based services and equipped with onboard solid state drives to maximize the use of 'in memory' working. Apple FaceTime for Mac beta is available for download to Macs running MacOS X and blends together its Address book with the ability to make calls to iPhone4 and iPod Touch users. [www.apple.com](http://www.apple.com)

#### Open Source Update

**The OpenJDK project to produce Open Source versions of Java** including Java Platform, Java SE, Java Language, JRE and of course the Java Development Kit, JDK, is being led by Oracle and IBM working as joint sponsors. <http://openjdk.java.net>

**The OpenOffice.org community, producers of the OpenOffice suite**, is to split with original member Oracle, which now owns Sun, along with Google, Redhat, and Novell and rebrand the new suite and development as LibreOffice. [www.openoffice.org](http://www.openoffice.org)

**Google is acquiring BlindType**, a vendor of onscreen soft touch keyboards, incorporating smart software to auto-recognize and correct mistakes. [www.google.com](http://www.google.com)

**Mozilla Firefox 4.0 beta 1 for Mobile** supports Android and Maemo Mobile Operating Systems and offers the same or similar capabilities as the recently released beta for PCs, but with a focus on usability on small screens and speed over wireless links. [www.firefox.com](http://www.firefox.com)

## Standards Watch

**Gartner have defined their top ten strategic technologies** for 2011

<http://www.gartner.com/it/page.jsp?id=1454221> - Cloud Computing; Mobile Apps and Media Tablets; Social Communications and Collaboration; Video; Next Generation Analytics; Social Analytics; Context Aware Computing; Storage Class Memory; Ubiquitous Computing; and Fabric Based Infrastructure.

[www.gartner.com](http://www.gartner.com)

**IEEE Ethernet 802.3az** is a new standard aimed at reducing the power requirement for Ethernet connected devices and is called Energy-Efficient Ethernet.

<http://www.ieee802.org/3/az>

## More Noteworthy News

**IDC reports Netbook sales down by 25%** in Europe Q3, thought to be due to a rise in Tablet(iPad etc) sales which are currently untracked by IDC. Overall PCs sales in comparison to the previous quarter were flat but up 10.5% over Q3 2009.

[www.idc.com](http://www.idc.com)

**VMware and NetApp** offer a bundled approach to combine virtualization of the server with virtualization of storage on NetApp systems. Code2Cloud is a new hosted service platform for developers using SpringSource.

[www.vmware.com](http://www.vmware.com)

**Salesforce.com has acquired Activa Live Chat** which provides social networking for enterprises and will be bundled with the existing Salesforce.com tools. [www.salesforce.com](http://www.salesforce.com)

**EMC Greenplum Data Computing Appliance** combines a data warehouse with a parallel processor to manage terabytes of data. The name comes from Greenplum Database 4.0 when Greenplum was acquired by EMC recently.

[www.emc.com](http://www.emc.com)

**Citrix XenDesktop 5 update** is said to simplify administration with a Desktop Director and a new XenClient for laptops as well as a range of new features.

[www.citrix.com](http://www.citrix.com)

**Dell Virtual Integrated System, VIS, architecture** has had new additions included around management software to cover the server and storage products already announced. [www.dell.com](http://www.dell.com)

**CA Technologies are acquiring Hyperformix**, a vendor of technology management solutions and then capacity management software, to add to their Cloud Services suite. [www.ca.com](http://www.ca.com)

**Facebook has changed** how profiles and groups are managed by the user, and added a feature that allows a user to block being added to a group.

[www.facebook.com](http://www.facebook.com)

**Twitter co-founder and CEO Evan Williams** is quitting the role to work on the products and technology side, with COO Dick Costolo taking over in a planned succession. [www.twitter.com](http://www.twitter.com)

**Yahoo is acquiring Dapper**, a smart Ad tools provider that adjusts advertising to user behaviors. **Yahoo Search** now includes Twitter, video and images as well as incorporating HTML5 to improve presentation. [www.yahoo.com](http://www.yahoo.com)

**RIM BlackBerry PlayBook Tablet PC** provides BlackBerry users with all their usual features and capabilities, but with the security of the BlackBerry

environment and is therefore aimed at the enterprise market as a competitor to the Apple iPad. **Developers are to receive new tools** to support using HTML5, JavaScript and CSS as well as being allowed to embed advertising within their apps to receive a percentage of the revenue. [www.blackberry.com](http://www.blackberry.com)

**Symantic Mobile Security Platform** now adds support for Android and Apple iOS 4 operating systems extending full enterprise security to the users of smart phones. [www.symantec.com](http://www.symantec.com)

**Sony Ericsson is dropping the Symbian Operating System** and will shift to Google Android as its replacement for its new products. [www.sonyericsson.com](http://www.sonyericsson.com)

**Skype is partnering with Avaya** to offer North American customers improved integration with their Avaya enterprise communication systems. **Android based Smart Phones** now have a version of the Skype Internet calling app previously only available for Apple iPhones. [www.skype.com](http://www.skype.com) [www.avaya.com](http://www.avaya.com)

**Endeca Latitude adds Twitter and email searches** to its combination of open analytics and Business Information reporting capabilities. [www.endeca.com](http://www.endeca.com)

**McAfee ePolicy Orchestrator** now has McAfee Security Management 5 directly integrated and new APIs to allow other security and monitoring tools to be added by developers. [www.mcafee.com](http://www.mcafee.com)

**VeriSign eHoliday Uptime is a bundled set of managed services for retailers** and illustrates how cloud based services can be deployed for specific periods and purposes. The bundle provides DNS, network and application availability backed by the flexibility of cloud based deployment of resources. [www.verisign.com](http://www.verisign.com)

**Novell Identity Manager 4 Advanced Edition** is intended to extend the existing product capability into cloud environments with role and process identity management. [www.novell.com](http://www.novell.com)

**CollabNet has acquired Codesion**, a Cloud Host of CollabNet Subversion tools. [www.collabnet.com](http://www.collabnet.com)



### About Capgemini and the Collaborative Business Experience™

Capgemini, one of the world's foremost providers of consulting, technology and outsourcing services, enables its clients to transform and perform through technologies. Capgemini provides its clients with insights and capabilities that boost their freedom to achieve superior results through a unique way of working, the Collaborative Business Experience™. The Group relies on its global delivery model

called Rightshore®, which aims to get the right balance of the best talent from multiple locations, working as one team to create and deliver the optimum solution for clients. Present in more than 35 countries, Capgemini reported 2009 global revenues of EUR 8.4 billion and employs over 100,000 people worldwide.

More information is available at [www.capgemini.com](http://www.capgemini.com)

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