

## Delivering on Tablets Rather than PCs

The annual 2011 IFA Electronics showcase in Berlin, one of the leading trade shows for consumer electronics and home appliances, showed the dominance of Tablet over every major manufacturer of PCs. The only notable exception was HP, whose TouchTablet running on HP WebOS has been withdrawn from the market following disappointing sales. The common factor shared by all the other Tablets was the Google Android Operating System (OS), which also brings convergence with smartphones using the same OS and is leading to a general crossover between the two types of devices. The market acceptance of the Android OS as the alternative to Apple iOS was further underlined when demand for the HP TouchTablet at fire sales resulted in great demand. This led to HP's decision to manufacture a further 200,000 units, with buyers' demand for the high-specification tablet hardware, but replacing the OS with Android.

The Tablet is creating a new generation of business capabilities allowing new entrants to the market including, for example, the Cisco Cius aimed totally at the Enterprise market. The Cius combines a lift-off Tablet with a desktop docking station to act as a standard PC but including a phone handset. Cisco is aiming for those places like the shop floor in retail or engineering, where the ability to walk around with the Tablet is very useful. The Cius aims to deliver a new generation of apps that are strongly visual, a picture of a stock line and demonstration of its key features for use by a shop assistant to a potential customer, or in the field of engineering, health, or... there is potentially an endless list of possibilities in several industry sectors.

This is a whole new category of capabilities and in the enterprise market it is strongly Android-based, though iPad is definitely the consumer favorite and already in several executive suites. The tagline for all these new enterprise Tablets is a variant of 'enterprise deployment by design' as opposed to the claim that the iPad is really a user-driven deployment by stealth. This leads to a healthy developing enterprise market for apps to run Android, and the use of the term 'the post-PC era' to define the development and deployment. The post-PC era is based on services or apps delivered under the Internet/web architecture rather than the Client Server Application model of PCs. It is used to clarify that this is the genuine Cloud model rather than the many different ways that the term has come to refer to.

At their annual DreamForce event, Salesforce.com showed their vision and focus to provide the very different development and deployment capabilities that this new market demands, based on substantial front office activities to combine people, process and real-time data together into an extended CRM environment. Salesforce.com has embarked on a total refresh of their Force platform under the name Touch.Salesforce.com. This move is to embrace HTML 5.0 that lies at the heart of the new visual apps delivered on Tablets with the slogan '*any app will be accessible on Touch*'.

SalesForce.com is now adding a full range of other services covering capabilities such as Database.com through to Sales Contact tools that compile comprehensive customer profiles by gathering all available public information from social sites. They are also extending their Chatter social tools and using their Office Productivity toolset ManyMoon, the current number one product app set on Google markets, to create a cohesive set of base services for developers to use.

Taken together, this may help to explain the rapid rise in Salesforce.com revenues and the shift from being a user-driven shadow IT subscription to being a full enterprise choice for development standardization. Salesforce.com is definitely not alone in recognizing this market. VMware made the term 'post-PC era' an

important part of their annual event immediately before the Salesforce event. Forrester too has identified this market activity and published a paper earlier this year titled *'The post-PC era is real; but it doesn't mean what you think it does'*. This paper not only identified the differences of the post-PC era in terms of business use and technology but also the need for cohesive co-existence with IT and ERP.

It is worth noting that Microsoft is seen by the post-PC players as the prime competitor with a strategy to support 'five screens': namely **PC, Tablet, Smartphone, Game Console** and **Television**, making each individually attractive enough to support a purchase as well as providing full integration of use, content and enterprise management between any combination of devices. Taken together, with the strength of the Microsoft Azure platform and the increasing range of Microsoft capabilities available as services, it is a formidable, cohesive and comprehensive approach that takes Microsoft into the post-PC era while maintaining support for its well-established base in the PC market.

As a footnote, Gartner have reduced their sales forecast for PC shipments in 2011 from 404 million units to 352 million units - a sharp fall, but still a sizable market. Other current predictions include HIS Research suggesting Apple will ship 60 million iPads in 2011. And that BlackBerry will gain most by HP dropping out of the enterprise tablet market as a logical enterprise choice to continue using BlackBerry as a wireless user device provider. The UK has proved to be the first market in which Android has become the dominant operating system for smartphones with a 47% share in the quarter ending in July followed by BlackBerry at 21% and Apple at 20%.

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

## Leading Company Results (Revenues)

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Q3	RIM BlackBerry↑16% @ \$4.91bn

### Movements by Industry Leaders

**Cisco ASR 9000 Aggregation Services Router System for Service Providers** has three new platforms; all aimed at supporting the rapid growth in Tablets, Smartphones and Appliances. **Cisco Integrated Services Route 819** machine-to-machine gateway connects via built-in 3G to add services in remote spots such as automated devices in outdoor facilities. **Cisco 5900 Embedded Services Router range** designed for rugged services in the military has been extended. **Cisco is to acquire Axioos**, a subsidiary of Competel Corporation and a provider of various network services. **Cisco Telepresence Everywhere approach** adds two new units, the MX200 - an out-of-the-box self-contained screen-based system -, and the Telepresence Conductor which manages the streaming of individual participants to optimize performance and bandwidth. **Cisco Cius Tablet running Android 2.2 aims** to introduce a new class of device deployed by enterprises where there is a high amount of visual information to be shared such as on-floor retail staff, where it can sit on a docking unit with a phone as a PC type device but also be carried onto the floor when needed. **Cisco and VMware collaborated to design VXLAN**, a Cisco product that aims to match virtual networks to virtual services from Clouds. **Cisco is acquiring Versly**, a provider of plug-in tools, to allow Collaboration between Microsoft Office applications and users. **Cisco Cius Enterprise Tablet** is designed to add a new category of device that supports highly visual apps such as retail shop floor. Cisco Nexus 1,000v Switch and VM-Flex virtual machine extender **now support the new Microsoft Windows 8 HyperV**. [www.cisco.com](http://www.cisco.com)

**Oracle VM Server 3.0** release is aimed to support third party developers as well as improve the platform for Oracle stack use. **Oracle Application Express 4.1** supporting Database-centric Web 2.0 applications and bundled for free in Oracle Database11g or as a free download from Oracle Technology Network (OTN). **Oracle Utilities Network Management System 1.11** modelling for Smart Grids. **Oracle Spend Monitor** provides monitoring of compliance issues for healthcare programs. **Oracle MySQL Installer for Windows** makes using MySQL simpler and can be combined with support for Windows Server 2008 R2 Failover Clustering. **Oracle Application Testing Suite 9.3** aims at simplifying Siebel CRM deployments. **Oracle Solaris 10.8/11** provides general upgrades plus significant new features for Solaris ZFS. **Oracle Pillar Axiom R5 Storage System** upgrades Pillar Storage system hardware with significant new features for data protection, mobility access and management. [www.oracle.com](http://www.oracle.com)

**HP P1000 3Par Storage System** adds two new models of high-end array storage covering 800 TBytes and 1,600 Tbytes. HP claim that **the fate of the PC business** will be settled within twelve weeks and that WebOS will be licensed to continue its role in the market. **HP VirtualSystem range** is now pre-integrated with a VMware package to support virtualized operation. **HP TouchSmart Elite 7320** business users PC offers multi-gesture, control-integrated with Windows 7. **HP is manufacturing a further 2,00,000 TouchPads** after huge sales demand for cut price units which can be converted to a high-end Android machine. **HP Inkjet Web Press** range of high-end graphic printing solutions has been updated. **HP Pavilion dm1** is claimed to be a new standard of high-end consumer PC, uniquely focussed to boost Windows features. **HP enterprise Security Discovery program** provides workshops to help Business and IT managers to understand security risks and the use of HP products to manage the environment. **HP Exstream 8.0 Customer Communication Management** tool adds secondary

delivery if the customers prime selected choice, SMS, email, etc. fails. **HP CEO Leo Apotheker** is dismissed by the HP board, who appoints ex-eBay CEO Meg Whitman in his place. [www.hp.com](http://www.hp.com)

**Intel Federal LLC** is a new wholly-owned subsidiary to work with the US Federal Government on High Performance Computing Solutions. **Intel Parallel Studio XE2011 Service Pack 1** is now available. **Intel Sandy Bridge** will feature graphic abilities both faster and richer handling as a market-driven move towards tablets and gesture control. **Intel is to partner with Google** on the development of Android and mobility platforms, with the release of an **Android Native Development Kit for Intel x86** chips and an emulator for Android Honeycomb. [www.intel.com](http://www.intel.com)

**IBM Tivoli will gain hybrid cloud management** with the CastIron acquisition tools added into the Tivoli toolset and IBM SmartCloud portfolio. **IBM Connections Social Network** platform is being extended to support Apple iOS, Android and BlackBerry. IBM is to **acquire Algorithmics** to add its specialized financial risk and analysis software to its financial sector portfolio. **A further acquisition is i2** for its advanced business analytics software. **IBM Enterprise Storage has a new road map** driven by 'Big Data' needs and will offer two separate product groups, one to support high performance access and the other high capacity storage. [www.ibm.com](http://www.ibm.com)

**Microsoft Windows 8 preview is available** to registered users of the Windows Developers site and features common builds able to run on phones, tablets and PCs with a new development tools and integration to on- and off-premises delivery. **Microsoft Windows Phone Mango** app shop is now open for developers to submit their apps for testing and inclusion prior to the release of the platform. **Microsoft Dynamics new 'CRM on the cloud'** allows transfers from existing Salesforce.com, SAP and Oracle packages. **Microsoft Windows Intune single browser management console for PCs** using cloud-based services will go live in October and all existing accounts on the Intune beta will be deleted. **Microsoft Windows 8 will offer full Hyper V virtual machine support on PCs** and other devices for both operating system and storage, but will **not support Adobe Flash**; instead Microsoft will take the HTML 5 path. **Microsoft Studio 11** is available as a developers' download claiming a single screen can be used for all stages of development including deployment. **Microsoft .Net 4.5** adds asynchronous programming to support scale out network applications. **Microsoft Azure SDK 1.5** and **Azure Toolkit for Windows 8** extend the possible ways that Cloud services can be used. **Azure Cloud Platform** has a new replication capability allowing two data centers to provide support and back-up for increased reliability. **Microsoft and Nokia are offering Symbian to Windows 7** migration tools and detailed documentation. [www.microsoft.com](http://www.microsoft.com)

**SAP 360 Degree Customer View** is new online service from SAP to help its customers see how various SAP products can be used to gain a full insight into Social CRM. [www.360customerview.com](http://www.360customerview.com) **SAP are acquiring Right Hemisphere**, a 3D visual applications specialist to boost the user experience of SAP software. **SAP Smart Meter Analytics, based on HANA**, provides real-time data analysis of 'big data' accumulation of small data inputs. **SAP Solution Manager 7.1** upgrade adds new Services Orchestration abilities to manage the new generation HANA apps. **SAP Sybase Unwired Platform 2.1** provides a development environment for mobile apps with linkages to other SAP packages including HANA based apps. **SAP BusinessObjects Edge Business Intelligence 4.0** adds geo-location and mobility features to a range of general improvements. **SAP is acquiring Crossgate**, a unique business data sharing network that allows collaborators in a business ecosystem to share data. [www.sap.com](http://www.sap.com)

**Google is to end a group of activities to 'focus on its core activities'** from well know services such as Desktop to minor services such as the Google Maps API for Flash. **Google Slide Social Network** is to be ended, as Google transfers its attention to Google+ as its core product. **Google Blogger Platform** has been upgraded with new tools and larger content capability. New downloadable versions of **Google Docs, together with eMail and Calendar will all work off-line** on the latest Chrome Browser. **Chrome 14 Browser** improves security after a high-profile competition to find flaws, adds new programing APIs, and provides better integrated support for Apple Mac OS Lion. **Google Wallet Application electronic cashless payment** has been launched in the USA in conjunction with Citi Mastercard, though there is an inbuilt Google own pre-pay card as well. **Google has acquired DailyDeal** to compete in the group bonus market place against GroupOn. **Google+ second generation social networking platform** invitation-only participation trial has finished and the service is now open to general public use. [www.google.com](http://www.google.com)

**Amazon Web Services ElastiCache** is a new beta claimed to automate the deployment and use of in-memory caching for performance improvements to web apps and said to be fully compliant with the Memcached approach used by many developers. [www.amazon.com](http://www.amazon.com)

#### Open Source Update

**China Standard Software (CS2C) and Microsoft** have agreed to jointly develop and sell solutions for the Cloud in China around hybrid solutions that combine CS2C Linux and Microsoft Windows. [www.cs2c.com.cn](http://www.cs2c.com.cn)

**Mozilla Firefox's next release** will feature better user interfacing for Tablets and particularly Android. [www.mozilla.com](http://www.mozilla.com)

**Redhat and UC4** are partnering to add business process automation to the Redhat Virtualization and Cloud offerings. [www.redhat.com](http://www.redhat.com)

#### Standards Watch

**The Global Internet Speedup** led by Google and OpenDNS is working on improving the operating speed of content servers by modifying the EDNS-client subnet standard. [www.opendns.com](http://www.opendns.com)

**The Open Data Center Alliance and Open Compute Project** are to work together to develop both sets of standards to be mutually aligned in developing high performance Cloud data centers. [www.opendatacentrealliance.org](http://www.opendatacentrealliance.org)  
<http://opencompute.org>

#### More Noteworthy News

**HIS Research on Apple iPad** ups the forecast sales for 2011 to 60 million units and holds that BlackBerry may gain most from HP dropping out of the tablet market as enterprises chose to remain with BlackBerry for a wireless business tool. **Kantar Worldwide** reports that in the quarter ending at the end of July **Android took 47.1% of the market for smartphones in the UK** followed by BlackBerry (21.5%), pushing Apple to third place with 20.8%. <http://www.kantaroperations.com/>  
**Gartner say PC shipments for 2011** are likely to be around 352 million units sharply down on the forecast 404 million though 3.8% up on 2010 - a very bad year. [www.gartner.com](http://www.gartner.com)

**The Storage Market grew 10.2% in Q2 2011 to a \$7.5bn market**, led by EMC with 26% growth in revenues to the top spot with a 21.6% share, followed by HP 19.2% and IBM 15.8%. [www.IDC.com](http://www.IDC.com)

**SAS Social Analytics tool** has been upgraded to include a Social Scorecards feature to show how a particular brand is doing on various social network sites, as well as other ways to examine online brand marketing success. [www.sas.com](http://www.sas.com)

**VMware Micro Cloud Foundry** is a free tool to developers to allow testing on virtualized platforms that runs on Windows, Mac and Linux systems as well as linking in to the VMware developers platform service. **VMware vSphere 5** provides a more powerful platform, handling up to 32 virtual CPUs and more memory with better storage management plus supporting Intel Open Fiber Channel over Ethernet. VMware has set up to help users understand how to develop their use of clouds and to add more support for web services, together with a range of new products to cover data centers, inter cloud connections, and a new **vFabric Data Director** for management of data bases. [www.vmware.com](http://www.vmware.com)

**Salesforce.com Dreamforce annual event** took place with the normal cluster of announcements. A new **updated version of the core SaaS platform** will be released in early 2012 called Touch.Salesforce.com and featuring HTML 5 to support Tablets. **Chatter gains Social Customer Profiles**, a new capability that allows external social network sites to be incorporated into the customers internal profile. Acquisition **Manymoon will be used to launch a new range of social productivity apps**, targeting SME business as a segment that wants a better way to run IT. **Data.com** is a new contact data base for salespeople. **Database.com** is claimed to be a new type of database service for social, mobile and open data. **Salesforce.com is acquiring Assistly**, a vendor of Helpdesk tools, to help new users to understand how to get the best from Salesforce products and services. [www.salesforce.com](http://www.salesforce.com)

**Verizon is acquiring CloudSwitch**, a specialist cloud migration tools provider, to link with its acquisition of Terremark IT Services and offer the ability to migrate a customer's operations from in-house to a Verizon-based cloud. [www.verizon.com](http://www.verizon.com)

**Samsung Galaxy Smartphone range** is to be split into four versions namely R, W, M, and Y to group different user groups, and a new model with a full physical keypad has been added. **Samsung Bada 2.0 OS** designed to be more attractive to apps developers will ship on the first Wave Smartphones before year-end. **Samsung Series 7 Chronos Laptops** introduce new high-performance business mobility units with a high-end spec and performance. **Samsung Slate PC Series 7** provides a crossover device that can be docked as a desktop PC or used as a mobile screen running Windows 7. A smaller 7.7inch screen **Galaxy Tab 7.7** running on Android 3.2 and a new Android 2.3 based **Smartphone for WiFi** only have been launched. [www.samsung.com](http://www.samsung.com)

**Dell Cloud Offerings** are to be increased to cover business applications and services for the SME market by partnerships with a variety of smaller providers. **Dell Inspiron 14z** is a new thin powerful notebook designed to appeal to users with its sophisticated design. Dell is to partner with **Chinese Search Company Baidu to sell Smartphones** in China. **Dell PowerConnect W series of wireless devices** have been updated with easier management of new security features. Dell Precision Mobile **Workstations M6600 and M4600** lift performance to new levels with high capacity Solid State Drives and Graphics cards. [www.dell.com](http://www.dell.com)

**Lenovo IdeaPad U series** units offer thinner, high spec PCs than the Apple MacBook Air. A **new budget IdeaPad Tablet A1** based on Android, with a claimed high brightness screen as well as USB and Micro SD ports. [www.lenovo.com](http://www.lenovo.com)

**Motorola Pro+ Android 2.3** smartphone features a full physical QWERTY keyboard. [www.motorola.com](http://www.motorola.com)

**Sony Tablet S is based on Android 3.1** and has a full set of wired ports plus wireless services and is lighter than an iPad with a bigger display area. [www.sony.com](http://www.sony.com)

**Toshiba AT200 Tablet** based on Android with a 10-inch screen and Toshiba Portege Z830 Ultra Book bring a new focus on high specification devices for the mobility market from former leader Toshiba. [www.toshiba.com](http://www.toshiba.com)

**BlackBerry App World 3.0** revamps the user interface and ease of finding and loading apps with new search features as well as a sharing feature for social networking. **BlackBerry Curve 9360** adds a new entry level business handset. [www.BlackBerry.com](http://www.BlackBerry.com)

**Strato Windows Phone 7 app** provides file access to the Strato HiDrive allowing both up and down stream loading but there are some restrictions for Microsoft Office documents. [www.strato.com](http://www.strato.com)

**Acer Aspire S3** adds a further ultra-book competitor for the light, thin notebook market. [www.acer.com](http://www.acer.com)

**Citrix XenDesktop 5.5** aims to *improve the user experience* by adding more personalization and customization as well as supporting an increased range of devices. **Citrix CloudStack** has added support for the VMware vSphere Hypervisor. [www.citrix.com](http://www.citrix.com)

**Brocade Network Subscription (BNS) Service** provides a managed set of network equipment in a client data center for a fixed set of charges that allow capacity to be varied as needed. **Brocade ServerIron ADX 1000F** is a new application level network switch serving both copper and fiber connections at new levels of low latency. [www.brocade.com](http://www.brocade.com)

**Skype App Directory** provides third party apps that are based on using Skype media services. [www.skype.com](http://www.skype.com)

**HTC Titan Smartphone Models** based on Windows Phone 7 Mango offer a standard and a very large screen options plus latest multi-media options. [www.htc.com](http://www.htc.com)

**Sage Sales Logix Cloud** is being extended from the US launch to cover Europe offering Sage Business Software on Amazon Web Services for SME clients. [www.sage.com](http://www.sage.com)

**Mimecast BlackBerry Archive** has a new add-on that allows a user's entire email archive to be searched in the existing email application. [www.mimecast.com](http://www.mimecast.com)

**Hitachi Global Storage Technologies Deskstar 7K1000D** family of single platter drives provide up to 1 TB of storage, making cheaper prices in comparison to the normal multi-platter drives required to reach 1 TB of storage. [www.hitachigst.com](http://www.hitachigst.com)

**AMD Bulldozer CPU chips** are now shipping to server manufacturers offering a 16core high-end performance for x86 CPUs. [www.amd.com](http://www.amd.com)

**Nokia Symbian Belle update** covering most Nokia Smartphones will be supported by a new range of apps including Microsoft Apps suite for free to provide a range of collaboration tools. [www.nokia.com](http://www.nokia.com)

**Adobe Flash Media Server 4.5** allows Flash-based video content to be delivered to Apple iOS devices without the need for Adobe to support HTML 5.0. **Adobe Flash Player 11** is positioned as best for games, media and news content usage in its competition against the increasingly ubiquitous adoption of HTML 5.0 led by Apple and Microsoft. **Adobe Edge** will be offered as the supporting capability for HTML 5.0 environments. [www.adobe.com](http://www.adobe.com)

**Sybase PowerBuilder 12.5** for Microsoft Win32 and .Net upgrade allows migration of Win32 code to .Net as well as supporting new features. **Sybase PowerDesigner 16** has a new user interface to make the understanding of IT systems easier. [www.sybase.com](http://www.sybase.com)

**Broadcom is acquiring NetLogic Microsystems**, a supplier of networking hardware/software to OEMs to build into appliances. [www.broadcom.com](http://www.broadcom.com)

**Twitter Web Analytics** based on the technology of its BackType acquisition allows website operators to understand how their content is being discussed on Twitter. [www.twitter.com](http://www.twitter.com)

**McAfee DeepSAFE security platform** is claimed as a revolution in protection against malware being fully integrated with the Intel processor and its instruction set (Intel acquired McAfee). [www.mcafee.com](http://www.mcafee.com)

**Compuware 360 degree Gomez Web Load Testing Platform** update adds 360 to the previous title as well as new tools from the acquisition of DynaTrace PurePath to improve the ability to breakdown all elements of individual threads. [www.compuware.com](http://www.compuware.com)

**Facebook Timeline major redesign** of user profile and interactions to provide a complete history of the user online together with built-in activity links to other content and sites. [www.facebook.com](http://www.facebook.com)