Market Roundup

December 19, 2003

Sun and IBM Both Announce New Grid Efforts

Every Little Bit Helps

Microsoft Aims Host Integration Server at IBM iSeries and zSeries

Season's Greetings

:sageza:

Sun and IBM Both Announce New Grid Efforts

By Charles King

Sun Microsystems has announced that it will fund the worldwide release of a new generation of SETI@Home, the project managed by researchers at the Space Sciences Laboratory of the University of California, Berkeley. The SETI@Home project has developed a new software platform, the Berkeley Open Infrastructure for Network Computing (BOINC) that eases the creation of public computing efforts like the SETI project. According to project leaders, BOINC offers more sophisticated management tools and twice the data throughput requirements of the original SETI@Home software. Sun is contributing Enterprise 3500, Enterprise 450, SunFire 480R and Netra servers, and Sun Ultra workstations to the project, along with other support. BOINC is currently available for free beta testing. In a separate announcement, IBM and Harvard University said they will work to establish the "Crimson Grid," a computing grid that will be used by students and faculty for research, data sharing, and collaboration in areas including life sciences, applied sciences, and engineering. Through an IBM Shared University Research (SUR) award, Harvard will receive IBM pSeries and BladeCenter servers for the project, along with support from scientists at IBM's Cambridge Laboratory. In addition, Harvard and IBM said they will collaborate to develop and pre-test open standards-based grid tools and protocols designed to help other academic institutions take advantage of grid computing models.

The buzz around grid computing has abated somewhat from the frenzy the subject inspired in 2002, but the Sun and IBM announcements indicate that while the media's attention may have waned, vendors and users are still intently focused on grid solutions. SETI@Home and the Crimson Grid project offer two differing but complementary portraits of grid. Launched in 1999, SETI@Home, whose goal is the analysis of data collected via radio telescope for signs of extraterrestrial intelligence, has caught and held the imaginations of volunteers in 226 countries who have donated millions of hours of time on home PCs and idle business computers to the project. While the "E.T. phone home" aspect of SETI lends the project more than a bit of sci-fi romance, its model of using many desktop PCs to perform light computational work has caught on among growing numbers of businesses and organizations via solutions from grid vendors including United Devices and Platform Computing. Though SETI@Home is only one of many public computing projects, the new BOINC solution's improvement of grid manageability should help extend such solutions even further. Sun's investment in is easily worth the cachet of being associated with such a well known and well regarded project.

IBM's contributions to the Crimson Grid have a slightly different bent. Rather than focusing on a highly distributed, diffuse, and donated infrastructure, the IBM/Harvard effort follows more along the line of other organizational and enterprise grids that seek to leverage existing IT infrastructures for widening pools of users. This is territory IBM understands very well, since it complements other work the company has done with universities, research facilities, and national laboratories worldwide. While faculty and students will undoubtedly benefit from the Crimson Grid, we believe grid tools and protocols arising from the project should help extend the value of IBM and Harvard's efforts to other hosts of other institutions and users. This is how it should be.

Practically speaking, grid is all about leveraging computing resources, whether they are under one roof or many, to the maximum. But the dream of grid is to extend the benefits of highly leveraged computing resources to all.

Every Little Bit Helps

By Jim Balderston

Dell, IBM, Sun, and HP announced this week that they will seek to create a set of industry standards for how networked servers are managed. The four major server hardware vendors were joined by Microsoft, Oracle Intel, and Advanced Micro Devices, forming the Server Management Working Group, which began meeting this week and intends to deliver a first version of the standard by July. The group plans to define the means by which servers on a network are discovered, configured, and managed. The standards the group will create are designed initially for stand-alone servers but will also eventually be applicable for blade servers as well.

While we are the first to admit that it is a fairly slow news week in technology, and that a preliminary set of discussions about server management standards is hardly show-stopping, the fact that these often bitter rivals are sitting down to make nice over how heterogeneous server farms can be more closely managed is a step in the right direction. These vendors understand that not only will they always have to sell products into customers' hodge-podge IT footprints, but also if they can't offer a common management schema then they all face longer and more painful sales and deployment cycles. We see this as further recognition that server hardware is drifting increasingly toward commodity components, regardless of lineage of the CPU. Parts is parts.

It is also important to note that these standards will be at a very low level. They essentially allow for basic single console views of a heterogeneous sever network. As such, this provides the foundation for a much richer, more intelligent IT footprint management environment. This level of management granularity, including virtualization, seamless failover and redundancy, higher utilization rates of assets, and self-healing capabilities will be the value-add that many of these vendors will provide for their customers in the coming years. This value-add will be the competitive differentiator among vendors; those that can bring the greatest level of hands-free management capabilities to the enterprise IT footprint will have a decided leg up on their competitors. While this new standards effort will surely help pave the way for such offerings in the future, it will also more certainly leave the final choices of customers to the vendors who provide the most cost-effective and facile management tools for their IT environment. Let the games begin.

Microsoft Aims Host Integration Server at IBM iSeries and zSeries

By Charles King

Microsoft has announced beta availability of the newest version of its Host Integration Server 2004 (HIS 2004), a component of the company's Windows Server System that provides legacy integration solutions. The new HIS 2004 offers options for connection of Microsoft-based servers to IBM mainframe (eServer zSeries) and AS/400 (eServer iSeries) systems, as well as improved application and data integration capabilities. HIS 2004 includes support for industry standard HRP/IP protocol which Microsoft claims will enable customers to simplify IT infrastructures and connect more seamlessly to OS/390 and Z/OS mainframes, as well as a new Transaction Integrator, which allows Windows-based servers to wrap mainframe and AS/400 LOB applications as .NET client components, and to function as "peers" of mainframe and AS/400 computers. HIS 2004 also offers improved tools for integrating data from LOB data sources and mainframe and AS/400 file systems, along with new security features including support for SSL and TLS. The Microsoft Host Integration Server 2004 is scheduled for release by mid-2004. No pricing information was included in the announcement.

The impending arrival of Microsoft's Host Integration Server 2004 has a number of interesting implications for Microsoft and its partners. On the strategic side, HIS 2004 is Microsoft's strongest statement to date that its server solutions are truly ready for both corporate data centers invested in IBM's big iron and the hosts of mid-market companies that rely on IBM's venerable AS/400 (iSeries) solutions. From a tactical standpoint, HIS 2004 provides an interesting crowbar Microsoft pals such as HP can potentially use to pry their way into hitherto closed IBM datacenters. Practically speaking, it is easy to see why Microsoft and its pals like this scenario. Numerous

sources suggest that half or more of corporate data resides in mainframe environments, and the middle part of the SMB market offers IT vendors higher profits for less work than vastly more numerous (but more diffuse) smaller shops.

But there are also subtler mechanisms at work here beyond a simplistic (or perhaps optimistic) Wintel Uber Alles promotion. Beyond the sheer volume of data or potential business represented by IBM's zSeries mainframe and iSeries customers, the two platforms stand as a venerable and substantial breakwater against the waves of industry standardization Microsoft and Intel have surfed so successfully. The fact is that most zSeries and iSeries customers are inordinately fond of and dedicated to their systems. Additionally, no U.S. IT vendor has anything to match the flexibility, dependability, and security of either integrated platform. In addition, IBM's virtual partitioning capabilities have made both platforms ideal environments for supporting Linux solutions, which remains a serious burr under Microsoft's saddle. In fact, evidence suggests that IBM's Linux efforts have given zSeries a much appreciated boost in both performance and relevancy. In essence, by targeting its efforts at iSeries and zSeries, Microsoft is attempting to beard the Big Blue Lion in its den. Putting the capabilities of HIS 2004 aside for a moment, we believe the real challenge for Microsoft, HP, and others will be in convincing those hordes of dedicated mainframe and AS/400 customers that Wintel solutions really are ready for primetime. HIS 2004 may offer vendors a new way to knock on those customers' doors, but whether or not anyone will bother answering is far from certain.

Season's Greetings

Today, December 19, will be the last Sageza Market Roundup for the year. The Market Roundup will resume publication on January 9, 2004. The Sageza Group will be closed Monday December 22 and will re-open Monday January 5. Email and phone messages will be intercepted and returned periodically as our holiday revelries permit.

As we reach another milestone of the 21st Century, we are once again reminded of something we said five years ago:

"A search for holiday and religious Web sites reveals a plethora of sites dedicated to the various observances in this holiday season. Christmas, Hanukkah, and Islamic Ramadan holiday sites are available in religious, informational, and commercial variants throughout the Web. While some sites focus directly on the religious elements of the holiday season, others attempt to capture the commercial spirit of the season.

This time of year — for those of a wide variety of faiths — brings forth a spirit that many wish would last the year 'round. We believe these Web sites — especially those offering informational instead of commercial material — offer a valuable resource for those looking to capture more of the holiday spirit than simply a large credit card debt for the new year. We do believe the Internet offers new ways for people to practice the holiday spirit of giving. For example, a substantial number of firms sent out electronic greeting cards to us this year, indicating that the savings over hardcopy cards and postage allowed them to make significant contributions to needy charities. While we have no illusions that the Internet alone will resolve the world's problems, we do believe that as a tool it can be used to address these problems in new — and perhaps effective — ways."

We at The Sageza Group would like to take the opportunity to wish all of our clients, friends, and their families the happiest and safest of holidays and a healthy and prosperous New Year.