



## Market Roundup

April 4, 2003

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## **IBM Girds Grid for Mainframes/CERN**

*By Charles King*

IBM has announced a number of grid computing developments focused on the company's zSeries mainframe solutions. IBM and SuSE announced that the Globus Toolkit is now available for Linux on the zSeries as part of SuSE Linux Enterprise Server 8. Additionally, DataSynapse announced the availability of LiveCluster 3G for Linux on the zSeries. LiveCluster will allow applications on the zSeries to participate in LiveCluster workload prioritization environments, essentially allowing the zSeries platform to act as an application server to deliver optimal load balancing, resource efficiency, and high availability in grid environments. Platform Computing also announced availability of three of its products for the IBM zSeries platform, including Platform LSF, Platform Job Scheduler, and Platform MultiCluster, which are designed to balance workloads, accelerate batch processing, and ease resource management across cohesive grid computing environments. In a separate event, IBM and CERN announced that IBM would join the CERN openlab for DataGrid applications to develop a data-management system built on grid computing. Designed to support CERN's new Large Hadron Collider (LHC), the system will be based on IBM's new StorageTank storage virtualization technology. IBM will supply CERN with an initial 20 terabytes of disk storage and a cluster of six Linux-based xSeries servers for a system expected to handle up to a petabyte of data by 2005.

It is reasonable to regard these developments as representing the present and future of IBM's efforts in grid computing. In present terms, the company continues to drive grid solutions both on its own and through partnerships with key grid players such as Globus and Platform. The essential message these announcements provide is that grid is not some geekish dream but a computing architecture that offers workable solutions to real world problems. The unique factor is the inclusion of IBM's zSeries mainframe products in the grid computing fold. While some might quibble about the practicality of utilizing mainframes in grids, we would turn the questioners on their heads. zSeries capabilities including dynamic server provisioning, virtualization, high availability, and server consolidation all offer critical support for grid environments, as evidenced by the DataSynapse and Platform Computing offerings. In fact, their ability to support heterogeneous platforms, manage multiple workloads, and interact with key IT resources makes mainframes look and act like standalone grids. Realistically, we do not believe these new products will drive notable mainframe sales, at least not initially, but we expect them to provide intriguing solutions for existing mainframe customers looking for ways to extend zSeries performance, reliability, and efficiency across larger data environments.

CERN represents a grid future focused on collecting, storing, accessing, and utilizing huge quantities of research data. Though the LHC's emphasis on Big Bang theorizing may limit its practical application to daily pursuits, its metaphorical influence will be galactic. We see IBM benefiting from its involvement with CERN

as threefold. First, simply being invited to the CERN party denotes a measure of bragging rights not every vendor enjoys. Additionally, the CERN openlab will offer IBM a highly public and demanding environment to test technologies that might eventually have commercial applications. Finally, CERN's choice of StorageTank provides this oft discussed but little seen storage virtualization solution a higher level of validation than IBM's ongoing assurances.

## The War, in Internet Time

*By Jim Balderston*

The Pew Internet and American Life project this week released its latest findings concerning the use of the Internet as a source of information about the ongoing conflict in Iraq. According to the survey, conducted from March 20-25 and sampling 1,600 Americans, a total of which 999 were Internet users, approximately 77% of online Americans have used the Internet in connection with the war, by viewing, sending, or receiving war-related information. While the report noted that television is still the dominant medium for gathering war-related news, 17% report that the Internet is their primary war news source about the ongoing conflict. That number is up significantly from the 3% that told survey takers the Internet was the primary source of news after the events of 9/11/2001. Prior to the Iraq invasion, 26% of the Internet users said they were using the medium as their primary source of information. The primary source of online news remains the mainstream media, with TV network and newspaper sites being the largest sources of news gathered online. Foreign news sites are viewed by about a third of the users seeing the mainstream US media sites, and Weblogs are making a small, but significant impact on news gathering habits. Four percent of users are using Weblogs for information. The report notes that the primary values of the Internet for news gathering are getting news from a variety of sources, getting up-to-the-minute news, getting news with a different viewpoint than traditional news sources, and getting news with a point of view other than official government sources. All of these values scored higher than 50%. The report also noted that younger Internet users – under the age of thirty – are the most likely to say the Internet helps them keep abreast of the news.

This report notes that even in the short time between the events of 9/11 and the Iraqi conflict, the Internet continues to gain substantial traction as a “go to” news medium. While television still dominates as a news source for the war, we suspect that its built-in edge to present the war in the most dramatic fashion – through video images – will continue to make it the news source of choice for many Americans until video images on the Internet are of comparable quality. As it is now, there really is no comparison, especially in the arena of the already-grainy videophone transmissions. It is also interesting to note that major media Web sites are the most popular for Internet users seeking war information. We suspect those people in these traditional media outlets that in the past had to push hard to develop Web presences for these sometime reluctant news outlets feel just a little bit more satisfaction these days as a result. Online brand extension is a powerful tool, it would appear.

While the Internet remains for most people a secondary source of war news, we note that younger users are making it much more of a habit to use the medium as not only a primary source of news, but one that has a high value of offering up-to-date information and a good mix of it to boot. That can only mean, we believe, that these types of numbers will climb in the future. We also suspect that the increased adoption and availability of broadband will shrink some of the built in advantage that network TV holds in the way of presenting video images, especially if the network sources make more of their video reports available online. Already, CNN is charging for such feeds. We suspect this is a trend that will continue going forward as well. While non-mainstream news sources trail the big media outlets in Internet usage, their increased presence must surely be noted as significant. Weblogs are making themselves known; they are at a point where dramatic statistical improvement is a near certainty as one considers the obverse of the law of large numbers. Here, with a small toehold in the Internet news spaces, Weblogs have nowhere to go but up, not only as providers of unique content, but as filters and aggregators of many sources of the news behind the news. The revolution, in all its banality, continues unabated.

## Vendors Who Swim with the Penguins: Sun Retools Linux/x86 Plans

*By Charles King*

Media outlets reported this week that Sun Microsystems plans to eliminate its customized Sun Linux product and base its Linux solutions of mainstream Linux distributions. To that end, Sun said candidates for Linux discussions would include RedHat, SuSE, MandrakeSoft, and Debian. As part of its efforts, Sun will incorporate Linux (along with Solaris) as a foundation for Project Orion, an integrated server software bundle the company said it plans to deliver to customers later in 2003. Initially, Project Orion components will include Sun's application server, directory server, identity server, messaging server, portal server, and clustering software. Sun also plans to make sure that Linux solutions run on the company's Solaris for x86 OS. To date, the company has delivered rack and blade servers based on Intel Pentium III processors. Sun is also planning an Intel Xeon-based rack server and is evaluating the development of products based on AMD's Athlon and Opteron processors.

Since this week's reports constitute the second retrenchment of the Linux strategy Sun announced just over a year ago, readers should be forgiven for looking askance at this latest sunny Open Source permutation. But while Sun's relationship with Linux remains somewhat thorny, this latest twist offers some suggestions that the company is finally approaching an Open Source détente that bodes well for both Sun and its customers. Sun seems to have realized that whatever advantages it could gain from a customized Linux distribution were outweighed by associated costs and effort, a view that is only sensible, in our view. More importantly, Sun appears to have come to its senses about the inevitable migration of x86 into enterprise IT. The company's line for years has been that x86 was a cute plaything that belonged nowhere near corporate datacenters, but these new offerings reflect a modified stance that x86 is actually "good enough" for certain specialized functions. This stance allows Sun to save face while ignoring a reality of IT life; customers buy and deploy technologies wherever and however they please, thank you very much. The most important issue for vendors the world over is having products in hand that customers want. In the case of x86, the market as reflected by enterprise customer behavior has been passing Sun by and flocking to vendors including IBM, HP, and Dell that offer full Intel-based product families. That Sun will deliver a more complete set of Intel-based solutions should help prevent its existing customers from dealing with other x86 vendors, who have been known to take second and third helpings of opportunities served up on a platter.

So is Sun's new-found rationalism concerning Linux and x86 something that the market and competitors should take note of? We think so. First, Sun's delivery of Solaris across both RISC and Intel platforms allow the company to deliver server solutions that are notably different than its rivals' products. Additionally, the company is likely to drive the Project Orion software bundle as a substantial value add that is more substantial (and cheaper) than competitors' more piecemeal offerings. Overall, while Sun may be arriving a bit late for the Linux/x86 party, the company has a history of moving aggressively and often smartly when it finally decides on a course of action. In other words, we expect that the easy pickings some vendors have enjoyed as a result of Sun's scattershot approach to x86 and Linux will become considerably tougher to harvest.

## No Antivirus Here

*By Jim Balderston*

The Severe Acute Respiratory Syndrome (SARS) outbreak in Asia has caused the cancellation of two Intel conferences in Asia, news reports indicate. Also this week, an airplane arriving from Tokyo in San Jose California was held on the runway due to concerns that several passengers were carriers of the mysterious and sometimes deadly disease. The passengers were cleared after being examined by doctors on the scene, according to a wide range of national news outlets that covered the story. Hong Kong has been noted in many media reports as a focal point of the disease and the ease with which the disease is spread has caused panic in various cities worldwide as well as in the U.S., notably in San Francisco's Chinatown district. Intel decided to cancel developer forums later this month in Beijing and Taipei as a result of the mysterious viral outbreak as the World Health Organization has recommended that people consider postponing travel to Hong Kong and the neighboring Guangdong Province of mainland China. Some 2,223 cases have been reported with 78

fatalities.

We would like to resist the cutesy wordplay take on this issue, i.e., “Real Virus Impacts IT Industry,” but we are hard pressed to find a way around that description despite its apparent facility. In a world where global JIT supply chains are increasingly *de rigueur*, the enterprise radar must be set on full sensitivity to detect any and all potential disruptions. There are many trip-wire perimeter defenses that can augment the radar; the supply of various components is certainly one very good example. Events like a well-advertised war can be anticipated in such circumstances, for there is plenty of advance warning about the possible paucity of chips, motherboards, memory, monitors, and such. But SARS present a different problem altogether and one much harder to prepare for.

SARS only impacts business through people. As an example, consider how much business Intel may be giving up by canceling its developer’s conferences in Asia as well as the impact such an outbreak may have on the fabrication plants that so many US IT vendors rely on as part of their streamlined JIT product delivery networks. Further, the potential spread of the disease – and the panic it is apparently causing – could move throughout Asia to places like India, where many IT companies have substantial investments in software development resulting in major impacts on innovations. There are times when it is very important to bring one’s head up from the work at hand and see the larger picture. While values such as innovation, CTO, ROI, and cutting edge technology may be worshipped internally, they can lead to a heads-down mentality that can effectively turn off the enterprise radar looking for disruptive events out on the horizon. While JIT supply chains are all the rage and quite sexy when they work, they come with unexpected risks that can only be seen when situations like the SARS outbreak appear. Word to the wise.