

Orchestrating the Stack

Next-Generation Developments in Enterprise Computing

Workshop

Geoffrey Moore

John Hamm

Philip Lay



Orchestrating the Stack

Forecasting the Future

The Stack for Enterprise Computing

**Business
Layer**

Consulting Services
Transaction Applications
Analytical Applications
Communications & Collaboration Applications

**Compute
Processes**

Application Server Infrastructure
Systems Management Infrastructure
Database
Operating System

**Compute
Engines**

Mainframes
Servers
Storage
Network
Microprocessor

Desktops
Mobile Devices
Printer/MFPs

Openings and Instabilities

- **Open-source products**
- **Security**
- **Voice/data/image convergence**
- **Mobile computing**
- **Content applications**
- **Non-relational databases**
- **Inter-enterprise applications**
- **Outsourcing & offshoring**
- **Grid computing**
- **Embedded computing**
- **Etc.**
- **Etc.**

Playing the Game (Part One)

- **First Objective**
 - Learn the names and numbers of the roster of established players
- **Second Objective**
 - Get a first-order approximation of what each player's strategy is likely to be

The Enterprise Gorilla Game: 2004

Category	Gorilla	Chimps
Consulting Services	---	IBM, Accenture, EDS, Infosys
Transaction Applications	SAP	Oracle, Siebel, Peoplesoft
Analytical Applications	---	Cognos, SAS, Bus Obj,
Communications & Collaboration	Microsoft	IBM
Application Infrastructure	---	BEA, IBM, Microsoft
Utility Infrastructure	---	CA, IBM, Veritas, Symantec
Database	Oracle	IBM, Microsoft
Server Operating System	---	Microsoft, Linux, Sun, HP
Mainframes	IBM	---
Servers	---	Dell, HP, Sun, IBM
Storage	EMC	Hitachi, HP, Dell, Fujitsu
Network	Cisco	Juniper, Foundry, Extreme
Microprocessor	Intel	AMD

Battle for the Enterprise: 2004-2010

Gorilla Strategy

- **Consolidate power in home layer**
 - Marginalize the chimps and monkeys
 - Transform layer into platform for services
- **Orchestrate the rest of the stack to**
 - Garner platform status for home layer
 - Enter into additional layers
 - Marginalize layers not entered

Battle for the Enterprise 2004-2010

Chimp Strategy

- **Use niche strategy to neutralize gorillas**
 - Dominate one vertical market
 - Establish defensible positions in two more
 - Block platform status for gorilla
- **Exploit openings and instabilities to**
 - Secure a gorilla position in an emerging layer
 - Escape from gorilla pressure in home layer

Battle for the Enterprise 2004-2010

Disrupter Strategy

- **Exploit Architectural Advantage**
 - Target openings and instabilities
 - Use niche tactics to accelerate adoption
 - Target gorilla status in emerging layer
- **Leverage *Innovator's Dilemma***
 - Attack markets that gorillas under-serve
 - Avoid frontal assaults on market positions gorillas must defend

Playing the Game (Part Two)

- **Third Objective**
 - Make a realistic assessment of your options, and select the type of game you intend to play
- **Fourth Objective**
 - Build or join a network of alliances in support of your game
- **Fifth Objective**
 - Win global domination with your alliance
 - (Watch your back going forward)

Recap

- **Systems of Record**

- The anchors around which IT is planned and industry standards are established

- **Orchestrating the Stack**

- The proactive attempt to influence the outcome of an evolution from Internet-enabled client-server to services-oriented architecture

- **Gorilla Games**

- A pro forma handicapper's report on current gorilla strategies for orchestrating the stack

- **Playing Your Game**

- Every one has a game to play (see "Instructions to Audience"), and there is a workshop at the conference to discuss these options further

Thank You

For a copy of these slides go to
www.tcg-advisors.com/stack