

# InfoWorld

## 2006

# TECHNOLOGY

## OF THE YEAR

## AWARDS

**I**N BROAD STROKES, 2005 WILL BE REMEMBERED for the emergence of multicore CPUs, the rise of enterprise x86, and even the quiet realization in datacenters throughout the land that CPU virtualization works wonders. But these weren't the only technologies making waves. The year also brought important — if perhaps more subtle — progress to nearly the entire IT landscape. *InfoWorld*

followed the action, analyzing the advances and lifting the hood on the latest innovations. What will be the most meaningful developments in 2006? What were the best products of 2005? Read on to find answers to these questions and more.

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# We may have seen the beginning of the end of the traditional integrated collaboration environment.

## COLLABORATION

### Scaled-Up Hosted Services Challenge the Old Paradigm

Linux-based “Exchange killers” show promise, but WebEx might have the secret sauce

THE COLLABORATION LANDSCAPE SAW some improvement last year, as 2005 was the year challengers to Microsoft Exchange made their case, podcasting became a national pastime, and WebEx’s management realized that small customers have money, too.

It might also have been the year that we glimpsed the beginning of the end of the traditional “integrated collaboration environment.” What other explanation is there when two of the top three collaboration products release major upgrades — coincidentally, both IBM Lotus Notes and Novell GroupWise ratcheted themselves to Version 7 within weeks of each other — but to little more coverage than rewritten press releases and brave-sounding quotes from the conference calls?

Although both IBM and Novell sputter on about solid customer bases, the former’s customers are tired of one slideware initiative after another, while those of the latter still have reason to wonder whether there’s anything more to collaboration than e-mail and IM.

IBM’s talk of an eighth release — and perhaps a ninth — of Notes does little more than tease users while they wait for a Workplace that may never arrive. Meanwhile, Novell is struggling to keep its customers long enough to get them moved over to GroupWise-on-Linux.

It’s no surprise that some of the loudest buzz this year centered around Linux-based “Exchange killers” ([infoworld.com/3330](http://infoworld.com/3330)). While vendors such as Scalix and Zimbra strove to clean out the chunk of the market that requires more than Postfix from their collaboration tools, Microsoft appeased its own customers by delivering

a significant service pack for Exchange Server 2003 and announcing the first trials of Exchange Server 12. That would be enough for most people, but on top of that, Microsoft bought Groove Networks and put Ray Ozzie in charge of its collaboration efforts. If Microsoft doesn’t actually own the collaboration market, it’s so No. 1 that there really is no No. 2.

But the collaboration sphere isn’t a permanent satellite of Planet Redmond.

Hope appeared when WebEx leapt into the micro-enterprise market by acquiring Intranets.com. The new WebExOne division delivers the “asynchronous” side of collaboration — calendaring, database management, and document management — in effect taking a credible intranet-as-a-service package and adding a new \$49-per-month Web conferencing feature. If anything’s going to kill Exchange, it’s a scaled-up version of these services.

## IDENTITY MANAGEMENT

### End-to-End Suites Still Coming Together

Juggernauts round out the portfolios as consolidation continues

THE IDENTITY MANAGEMENT MARKET IS one that we watch closely. And while it has yet to fully explode into the mainstream, 2005 saw it steadily gaining momentum. Identity is so compelling because it’s far more than just a security technology. Authentication, fine-grained access control, and SSO (single sign-on) are all advantageous, but they only represent the tip of the iceberg of what an identity suite can accomplish.

Ultimately identity will serve as the foundation for managing distributed webs of application services, paving the way for smoother, SOA-based business integration. But, of course, that’s a long way off. In the meantime, most enterprises will embrace it for its ability to automate provisioning and deprovisioning of user accounts, as well as for its centralized authentication

logging and auditing capabilities, both of which can play a crucial role in regulatory compliance measures.

For many companies, however, setting up an identity infrastructure remains a daunting task. Not only is the technology complex, but it also inevitably touches countless areas of an enterprise and its business processes. Reducing the perceived barriers to entry will be Job No. 1 for identity vendors as we move into the new year.

For starters, that means shrinking the playing field. For 2006, expect to see the identity market continue to consolidate around a handful of top-tier vendors with established track records in enterprise IT.

IBM grabbed Access360 in 2002 and Sun Microsystems nabbed Waveset in 2003.

Although cynics have tagged podcasting as a flavor of the month, it also appears to be the future for one-way content delivery to niche audiences. The problem remains how to make money narrowcasting in a billing structure built for broadcasting.

Meanwhile, businesses continue to inch toward unified messaging. Although the Holy Grail of a single inbox for e-mail, instant messaging, and voice sounds appealing, customers are taking their time in adopting the concept. Some of this reluctance must stem from the inevitable realization that unified messaging still requires a PBX, as well as a CT (computer telephony) server to connect the PBX to the mail server. If vendors expect wide-

spread adoption of unified messaging, they are living in a dream until they can deliver a solution that requires less hardware instead of more.

In short, more questions were asked about collaboration during 2005 than there were answers. Customers are still trying to decide whether e-mail, instant messaging, and voice mail should be no-frills operations, or if they ought to offer every service conceivable at the expense of compatibility. But there's a future in collaboration-as-a-service; agile vendors such as WebEx are infinitely better placed to deliver something usable than the dinosaurs of years past.

— P.J.C.

Last year, HP's acquisition of TruLogica and CA's acquisition of Netegrity showed that identity shopping continued to be the rage. And this year, Oracle snapped up identity pure-plays Oblix, OctetString, and Thor Technologies, giving the database and applications vendor a formidable product line. Moreover, Hewlett-Packard rounded out its identity portfolio by adding federation vendor Trustgenix last month.

Unlikely as it may sound, CA, HP, and Oracle can still be seen as the underdogs in the identity management space. With heavy-hitting competitors such as IBM Tivoli, Microsoft, Novell, and Sun to contend with, emerging as the market leader will be an uphill battle for any vendor. As a result, expect more pure-plays to fall under the umbrellas of these big names as the heavyweights continue to strengthen their identity portfolios in the coming year.

Usability will be the next big battleground. So far, Novell has taken the lead in this area, offering sophisticated management tools atop its mature directory server foundation. The recently released

#### AWARD WINNER

##### Best Identity Manager

###### Novell Identity Manager 2

Powerful graphical workflow and design tools, intuitive user interface, and solid directory foundation give it an edge over strong competitors

Identity Manager 3 builds on an already solid product offering with automated provisioning capabilities and a visual policy designer based on the Eclipse framework. Expect the other vendors to follow suit with their own more accessible user interfaces as the competition for new customers heats up.

The key long-term play for the industry, however, is federated identity. The lure of centrally managed authentication and centralized access to resources across multiple network domains, including those of business partners and customers, is obvious. Unfortunately, this technology is still immature and federa-

#### AWARD WINNERS

##### Best Exchange Killer

###### Gordano Messaging Server 10.05

Feature-rich and strong-performing messaging server that eases the transition from Exchange with unique real-time mailbox migration

##### Best Live Collaboration

###### WebEx WebOffice

Shared databases, documents, and discussions, plus seamless integration with real-time meetings

tion remains somewhere on the horizon for most customers, although successful implementations have already begun appearing in the telecom industry and other verticals.

The arrival of SAML 2.0 from the Liberty Alliance should make it easier for vendors to implement standardized federation capabilities, but logistics remain the big challenge. The vendors will have to invest heavily in developing best practices and procedures for key industries before customers will be convinced that federation is worth the effort, or indeed is even feasible.

Over the long term, SOA may prove to be the ultimate driver of identity technologies, as identity management and service orchestration dovetail into a single infrastructure management discipline. For now, however, sustained growth will be the theme throughout 2006. Identity management is still in its early phases, but it's never too soon to get on board, because big things are ahead.

— Neil McAllister