

Monday, April 20, 2009

Some personal thoughts about the Oracle/Sun deal

My retired father reads business news quite often a day and as his son happens to work at Sun, he reads everything about Sun. So everytime i visit my parents there is a discussion about all the stuff happens at Sun as far as i doesn't disclose any secrets. BTW: He already knows my opinion about the journalists.

After the announcement of the deal i've got a call from him. Camouflaged by a different question, that could wait for some hours, he asked "What do you think about this deal?". I know he was curious. Well ... i didn't really thought about it at that moment. My first thoughts were more like "Thank godness. It's not IBM." and i was working on my presentation for Graz on Saturday. I wasn't fond of the perspectives of working for IBM. I really thought about founding my own startup with some of my tea-cooking ideas (those, i didn't disclosed in the blog) for the case there would be an announcement of an IBM/Sun merger. I really think: Better red than blue. Much better.

Obviously i started to read everything available about the deal like the mail from Jonathan or the press releases or comments by journalists. By the way: There was someone who forwarding the mail from Jonathan directly to Slashdot. WTF

My feeling in the gut thinks positive about this deal: When you really think about an IBM acquisition of Sun, it would more like taking out a competitor.

When the deal with Oracle can be closed, there will be interesting opportunities instead. I don't know where this journey will lead Sun and at the end me. But i know this will lead to interesting developments in the market. IBM has now an strong competitor. Maybe it's a sign that the open systems market starts to mature. I know ... nothing really definitive from my side ... but i assume, that my opinion will be more refined in a few days.

Some additional comments:

Some bloggers and twitterers wrote "Oracle will take out Mysql". Well ... at first ... Oracle DB and Mysql addressing pretty much different markets. At second: Mysql is GPL and you can't put it back to closed-source. Third: There is money to make with mysql in markets unaccessible by Oracle DB (pretty much the complete small web database market). And i don't think that they were upset about the existence of Mysql ... just about the fact, that they can't make money from it Some bloggers and twitterers wrote "Oracle has no interest in HW". Well ... is it just me or is CMT a perfect match to many OLTP workloads and now they have a real interest to tune their products to CMT and develop more auto-parallelization technologies for situations where CMT isn't a good fit at the moment. With this CPU knowhow in their hand and with the intimate knowledge of Oracle Sun/Oracle could build kickass database machines and Larrys dreams of a database machine would be more realistic. It's interesting that everybody talks about "Oracle will kill ..." or "Oracle will fire ..." but i didn't saw any tweets and few blogs "Oracle will create/enable/extend ...". Looks like most people doesn't have any ideas of making new business. Economy isn't just about "slash 'n cut away". It's about creating new opportunities. Even without really thinking hard about it, i have several ideas of new business opportunities.

That's only my personal opinion. The announcement is just a few hours old. So let's wait for the moment when this deal is finalized and closed.

Posted by Joerg Moellenkamp in English, General at 21:43

What do you expect from the bloggers? Oracle will get 1,5b Dollars in 2010. What can Oracle better than SUN by itself and how will you do this without cut 80% from SUN ? There is now way to do this without killing SUN.
Anonymous on Apr 20 2009, 21:50

I have some ideas about this, but i can't write about them at the moment. But they are really obvious. I think, you have to ask: What can Sun do better as a part of Oracle ... just think a while about So before declaring the kill of Sun, just let's wait ...
Anonymous on Apr 20 2009, 22:00

After I red your blog entry about Oracle's enthusiasm about Solaris ("best unix") I assume that the layoffs in Oracle's own Linux department (e.g. btrfs project) is more likely.
I mean who needs btrfs if he owns ZFS ?
Anonymous on Apr 20 2009, 22:09

Blog Export: c0t0d0s0.org, http://www.c0t0d0s0.org/

A CPU that supports transactional memory... hmm, what could a DB vendor do with that...hmm...
Anonymous on Apr 20 2009, 22:38

Well at the end it's all about shareholder value and politics.

If the Mysql staff doesn't feel comfortable at their next new employer I'm pretty sure that some of them will take the next exit.
Anonymous on Apr 20 2009, 22:40

You are the one and only person who blogs non stop about Oracle and Sun. Why? Let's wait and see what happen.

Kind regards.
Tschokko

Anonymous on Apr 20 2009, 22:43

And keep some of the bs uncommented that flows through the news and twitter ?
Anonymous on Apr 20 2009, 22:48

Interesting idea
Anonymous on Apr 20 2009, 22:49

YES - You name it: "Thank godness. It's not IBM."

Perhaps... at the end IBM will be the looser there are great oppotunities for Sun with Oracle ...

And this will hurt IBM and makes its bussiness harder they will wish they would have made the deal.

Keep your fingers crossed....

M.
Anonymous on Apr 20 2009, 23:09

... and M\$? Oracle has now all the software AND the hardware. I think, Steve B. is not amused.
Anonymous on Apr 21 2009, 10:35

I would have loved to see sap buying sun, but they were not brave enough neither they have the money. well well....
Anonymous on Apr 21 2009, 10:47

Good thoughts- i totally agree with you and wish that this marriage will bring the best for both sides- SUN and Oracle.
Anonymous on Apr 21 2009, 11:08