

Thursday, April 23, 2009

Some personal thoughts about Oracle, Sun and Suns hardware business

There are so many statements in the Internet, that Oracle will kill of Suns hardware business when the deal is finally closed. Well ... that's really interesting, because in the official presentation of Sun there were several statements, that they want to provider solutions from app to disk. They talked about investment protection of SPARC customers. I assume that many from this "experts" and "analysts" doesn't took the time to analyse the data available to the public before they started to the race "Who predicts a higher reduction in force?"

It's just an educated guess, but i even think (and thats a personal opinion just based on the available material) that nothing will change in regard of the Hardware business of Sun. When a combined Oracle/Sun wants to be competitive you have to produce your components at a certain price point, for a competitive price point you need volume. And as large as the Oracle DB market is, i don't think it's huge enough to provide volume. Assuming that Oracle will kill of Sun HW or just selling it with Oracle would be equal to an IBM just selling their xSeries or pSeries system to Websphere and DB2 customers.

Posted by Joerg Moellenkamp in English, Oracle at 10:39

You know, since putting two and two together and realising Schwartz and Co were busy convincing customers and public alike that everything at Sun was hunky-dory - all the while putting the company on the block and selling it out..I think that practically anything could happen.

Common sense took an extended vacation on the 21st April, might be a few years 'til we see it again.
Anonymous on Apr 23 2009, 11:07

Oh yes zee "experts".

Always worth a laugh, many blogs or forums offer more profound information.

My best guess is currently that oracle might ditch Suns x86 hardware ... no real, big chance to differenciate oneself there from hp / Dell etc.

But they could go on with Sparc as Rock has "certain" benefit features, no "expert" ever heard before
just my 2 c

Alex
Anonymous on Apr 23 2009, 15:11

My best guess would be to wait for the first Oracle movee to tell the future. I know, it is not a guess then.

My second thought would be that Oracle will be like IBM able to sell the overall infrastructure and support to a client from a global aspect. I can find only IBM to do so. But IBM technologies look crippy to me. Once, Oracle will be in the IT showing how cool is the application and their support, it is easy to come and show to CIO : "look, we can do the same but you won't have to buy and host the infrastructure, let us do that for you" which is all about the next round in my mind.
Anonymous on Apr 23 2009, 17:04

Your last personal thoughts are complete wrong. Why should it be better now? Your personal thoughts are only personal wishes, not less and not more.
Anonymous on Apr 23 2009, 20:21

They are as valid as any other number circling in the net and the press. But this number is at least founded on some public available information You just have to read and look at other companies.

Do you have any hints, why my thoughts are completely wrong? Do you have any hard and verifiable informations indicating this?
Anonymous on Apr 23 2009, 20:45

Not more than you. But you belive that SUN will live for a couple of years without changes, thats what you wrote. That not teh future of sun, there will be a strange cut. As a employee i guess its not easy to wrote the truth, but many of your colleguas will get strange problems.

Your thoughts about SUN/IBM are complete wrong. "Thats all bullshit rumors", no it wasnt. I guess there are some strange problems inside sun that mr schwartz are going around and look around for a buyer of sun. Thats scary, isnt it?
Anonymous on Apr 23 2009, 21:01

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

You should read more precise: I wrote that i don't think that Oracle will dump the HW business. Job cuts? Well ... i won't speculate about that here, that's a different story. I have an opinion and idea to that ... but i won't write about them here. At the end it's a still unclosed deal ...

I won't comment on your other statements. And yes, i really thought that those reports were bullshit. Error is human.
Anonymous on Apr 23 2009, 21:23

I'm not saying you are wrong, but you must also consider that Oracle "needs" to say certain things at this point. They cannot come out and publicly announce that they are dumping the HW side of things months before the deal is even complete. What they are saying publicly today does not necessarily have any bearing on their actions in the future. Personally I like to think, or hope at least, that they will keep the hardware, but I would suggest that the SPARC line could be in trouble.
Anonymous on Apr 23 2009, 21:50

As for specific x86, mid-range of high-end Sparc processors, Phillips again avoided details but claimed all Sun's processors look appealing. Screven added: "When we were considering the acquisition we studied the processor lines and benchmarked things - we needed to be comfortable with the fact these were hardware platforms, systems, that we were going to keep selling and developing...we are very comfortable." http://www.theregister.co.uk/2009/04/23/oracle_sun_town_hall/page2.html
Anonymous on Apr 24 2009, 01:50

Ich erinnere mich an die erste Präsentation von Helmut Wilke seinerzeit - "Wir wollen nicht wie DEC enden". Sun wird mit der Zeit aus dem Bewusstsein verschwinden nachdem nicht mehr viele Ex-Sunnies für Oracle arbeiten. Aber gibt es nicht so etwas wie Kündigungsschutz für eine Übergangszeit, in der sich jeder Noch-Mitarbeiter umorientieren kann ?
Anonymous on Apr 24 2009, 11:38