

Rust Report

News and views of the action in Australasia's IT sector this week

January 29, 2010

THE RUST BUCKET

Set for change

IN RECENT DISCUSSIONS we asked more than 30 executives, venture capitalists, and industry gurus how they thought 2010 was moving. Not surprisingly, there was no consensus. While nearly everyone is concerned about the economy, their reaction to it and their plans to deal with things are across the map.

Like most industries, Australia's technology sector is facing a range of challenging structural shifts in 2010. Ready or not, cloud computing looks set to be a fact of life in the very near future. The list of major hardware and software vendors that are embracing the concept is growing longer weekly. With every new vendor and every new technology offering, definitions expand. Depending on your point of view (or the service you're selling), the cloud may include utility computing, on-demand applications, hosted services, APIs, tools, or all of the above. The incentive for vendors to come up with a commonly agreed definition has always been an industry issue, including a host of buzzwords to be debated by the technology elite. There will be many more hot buzzwords this year.

In this era of constant change, organisations face enormous pressure to optimise performance and maximise business results. Voice and data networks will play an increasingly crucial role in determining whether an organisation flourishes or founders. Today's organisations must also embrace innovation, achieve a high level of responsiveness, and transform customer information and feedback into actionable results.

"It is not the strongest of the species that survives, nor the most intelligent, but rather the one most responsive to change," wrote Charles Darwin.

Organisations face tremendous pressure to stay within limited IT budgets. Under this drive of doing more for less, many companies will also continue to choose to outsource in order to enable business growth — driving out costs and at the same time creating new avenues of possibility. Gartner's top predictions for 2010 and beyond included that by 2012 "20 per cent of businesses will own no IT assets". Several interrelated trends are now driving the movement toward decreased IT hardware assets, including virtualisation, cloud-enabled services, and employees running personal desktops and notebook systems on corporate networks.

The transition to a digital and connected world is disrupting economies and creating new challenges, and it can also lead to economic growth and improvements in the quality of our lives. We just need to have our policymakers respond. Australia's competitiveness, workforce capabilities, funding, ambition, and infrastructure must form a reality not a mirage.

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Aussie wins contract from US regulator

Sydney-based company Nuix has been awarded a five-year contract to provide its corporate investigation and electronic discovery software to the US Securities and Exchange Commission. The software will help the agency detect fraud and white collar crime. A statement released by the SEC stated that "no software other than Nuix can process large collections fast enough to meet the SEC's desired timeframes".

Nuix was introduced to the SEC at this time last year when the company was a runner up in the G'Day USA Innovation Shootout in San Francisco (Rust Report, Jan 23 2009, p1). "When you think about the massive amounts of data that can be involved in just one corporate, regulatory or criminal investigation — sometimes tens or hundreds of millions of e-mails, attachments, and other digital files to sort and sift through — simplifying the process for each document makes a critical difference," said Eddie Sheehy, CEO of Nuix. www.nuix.com

Bulgarian carrier seeks Clarity

Clarity, a subsidiary of Australian ICT products and services provider Powerlan, has received a purchase order to supply its operational support systems platform to Bulgarian carrier Vivacom. The telco provides fixed and mobile services and is ramping up its ADSL offerings.

"Clarity's OSS platform is targeted to help increase the efficiency of Vivacom's network operations and field-force logistics and to improve the customer experience through reducing fault resolution and provisioning times," explained Jon Newbury, CEO of Powerlan. "Originally targeting fixed network services, the platform will provide a long-term solution for Vivacom's fixed-mobile convergence strategy and is expected to support the business through a nationwide roll-out of next generation networks and services," Newbury added. www.clarity.com

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INSIDER EDITION

TechOne scores a first in Scotland

The first Scottish client of Australian solutions provider TechnologyOne has gone live with the developer's integrated financial and procurement software. The applications are being used to give Strathclyde Partnership for Transport greater control over procurement functions and to provide faster and more detailed reporting across the organisation, explained Adrian Di Marco, executive chairman of Technology-One. With the completion of the first phase of the implementation, focus will now shift to the roll-out of asset management and timesheets applications across the organisation, Di Marco added.

- TechOne has also supplied software to Adelaide's Campbelltown City Council to help it implement a climate change strategy and understand its emissions profile. www.technologyonecorp.com

MDS keeps on trucking

MapData Sciences has built an interactive mapping portal for the National Transport Commission to help truck drivers and operators plan journeys. The portal will eventually allow operators to plan the optimum routes for moving their freight. www.mapds.com

RUST BUCKET

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In every industry there are always milestones that mark a change in the course of history and the IT industry has had more than its share over the past 60 years. To remain competitive in today's world and to find solutions to the most pressing needs Australia must transform itself and create and maintain an innovation economy. This year, more than ever, the top skill everyone will need is managing complexity: the complexity of dealing with change, the economic crisis, the job market, global competition, and new technologies. Dealing with the aftershocks of the industry meltdown must be a top priority for every business and individual.

Many companies are not ready for the future; their business leaders need critical knowledge of emerging trends, both standalone trends and the fusion of various trends that will shape future opportunities. Understanding which trends will have an impact on yourself, your organisation, and your marketplace will determine your success.

— Len Rust RustOz@bigpond.com.au

Hotels group welcomes Brennan

Australian IT solutions and services provider, Brennan, has been selected to upgrade legacy systems used by the Rendezvous Hospitality Group. As part of the deal Brennan will install a private IP WAN for 15 of the group's hotels, migrate 17 disparate domains to a centralised management environment, and host and manage all of the group's servers, explained Dave Stevens, managing director of Brennan. "The project is more than a systems upgrade," he added. www.brennanit.com.au

Packaging company goes Interactive

Data centre hosting company Interactive has been selected to provide managed IT services to flexible packaging manufacturer, Aperio. Under the terms of the deal Aperio's IT infrastructure will be co-located to Interactive's data centre in Sydney, and Interactive will provide security and access to shared services for Aperio's 13 sites in the Asia/Pacific region. www.interactive.com.au

Microsoft bags all of Queensland

The Queensland Government has awarded Microsoft a whole-of-government agreement covering the delivery of "competitively-priced products and services" to government agencies.

Robert Swarten, Minister for Public Works and ICT, said the deal "gives all state and local government entities access to a range of essential server technologies". It also gives all state and local government entities the opportunity to purchase other Microsoft solutions. www.microsoft.com/australia/

RailCorp extends Fujitsu contract

NSW train operator RailCorp has extended a contract with Fujitsu covering the provision of managed services on desktop support, service desk, server management, and data centre operations. The contract, which was originally negotiated in 2006, has been extended for a further two years. www.fujitsu.com.au

Casinos back Ariba's technology

Two casinos — Crown Melbourne and Burswood Perth — have selected Ariba to supply Web-based sourcing and contract management systems. Under the terms of the deals Ariba's remuneration is tied to the casinos's cost savings. www.ariba.com



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Inadequate financial software is one of the main reasons why businesses struggle in tighter economic times

BY ASSOCIATION

Preparing for the ICT revolution

By Anthony Wong*

WITH THE IMPACTS of the global downturn now receding, there is an opportunity for Australia's ICT sector to establish itself as a leading player in key areas like the financial services market and the digital economy.

Having survived the recession relatively intact, our financial services sector is well positioned to market its services throughout the Asia/Pacific Region and even globally.

A report released late last year by the Australian Financial Centre Forum noted the Australian financial services sector's recent strong performance and highlighted that, despite its solid domestic base and the enormous opportunities in the offshore market, there was very little cross-border activity. The report identified key areas of policy which, if amended, could lead to a "more competitive, efficient and internationally engaged financial sector, a sector where offshore participants want and need to do business".

With the Asia/Pacific still the fastest-growing region in the world, a more internationally engaged financial services sector would deliver a range of benefits for Australia.

Since financial services rely heavily on new developments in technology to enable them to manage the flow of information, conduct transactions, and maintain the privacy and security of stakeholders and clients, any expansion of this sector would have enormous flow-on benefits for the ICT industry.

Australia needs a policy framework that encourages greater exports of financial services and expertise while the demand for these services remains strong.

Another key area of focus must be the digital economy, which will be a key driver of economic prosperity throughout this coming decade. Leveraging the digital economy allows small or medium-sized companies to create the perception of a much larger organisation, significantly levelling the playing field to enable them to compete effectively with bigger rivals.

Local e-tailer, dstore.com.au, is a case in point. The company plans to open its first storefront in coming weeks, the first of six outlets it will open in regional towns of around 10,000 people over the next 18 months. With just 20 full-time employees, the company has enjoyed tremendous growth thanks to a strategy of sourcing and selling a range of around 800,000 consumer and electronic goods direct to the public. dstore's online retail and marketing model allows it to take advantage of significantly lower prices in regional areas while still selling to the world.

The Australian ICT sector will benefit enormously from greater collaboration towards creating a more competitive business landscape.

The ACS believes we can do more to leverage the significant impact of ICT innovations, products and services to improve Australian living standards and quality of life.

We will also champion professionalism as a way to reduce risk and ensure that technology solutions not only deliver on their promised functionality and performance, but are also reliable and secure.

*Anthony Wong is chairman of the ACS and chief executive of AGW Consulting, a multidisciplinary ICT, intellectual property, legal, and consulting practice. www.acs.com.au

Aussies worth watching

A roundup of companies making waves at home and abroad

- ACTIVA provides asset management software solutions and associated business consulting and application support services. Activa's solutions are based on a core of system software tools and the company's fixed asset register functionality. Clients include Flight Centre, Wesfarmers, Price-waterhouseCoopers, ASIC, AMP Capital, Michael Hill, Kennards Hire, and Melbourne Airport. www.activa.com.au

- PLATFORM46 uses social networking technology to provide a consolidated real time view of everything that is going on in an organisation. It provides a personalised front-end through which each user receives real-time information, alerts, and prompts from a range of business applications and colleagues to promote efficient and timely work processes. Groups and projects can be created for multi-user collaboration or for sharing ideas. www.platform46.com

- MEX specialises in asset maintenance software and has more than 5000 users worldwide in a number of business sectors. Some of the companies utilising MEX maintenance management software include hotels, mine sites, resorts, theme parks, processing plants, and wineries. Clients include BigW, RMIT, Dulux, PGH, and Origin. www.mex.com.au

- BUILDINGIQ offers a software system that reduces energy costs and emissions in commercial buildings. The company leverages research into building controls and thermal comfort that was carried out at the Energy Transformed Flagship Division of the CSIRO. www.buildingiq.com

- COCOON DATA addresses the need for data security in the public, commercial, banking, and defence sectors with a product that separates an encrypted file from the access rules and keys. The access rules and encryption keys reside on a server and the encrypted envelope moves separately, but it always refers back to the server before allowing access. www.cocoondata.com

- NAQ TECHNOLOGY specialises in development, hosting, and network services. The company provides easy-to-use, end-to-end systems that simplify the processing of financial and business information and provide efficient workflow solutions. The company has acquired a number of subsidiaries and has retained the specialisations of each one. www.naqtechnology.com.au

DEALMAKERS

Beam sets sights on Mexico

Beam Communications — a subsidiary of Australian company World Reach — has appointed a distributor for Mexico. Michael Capocchi, managing director of World Reach, said Spacenet Communications Services di Mexico will service established and emerging markets, including maritime, leisure and commercial fishing, aviation, oil and gas, utilities, agriculture, emergency communications, mining, transportation, government, military, and heavy construction.

"Beam's product range enables Spacenet to gain access to the widest range of Iridium products available, thus providing a suite of products and services to immediately support voice, data, telemetry, and tracking opportunities," Capocchi added. www.beamcommunications.com

Tracknology wins Sonim backing role

Tracknology, an Australian company that provides workforce mobility solutions, has demonstrated its faith in Sonim, a US developer of ruggedised phones by adapting its software for the devices and joining Sonim's partner program. Through the partnership Tracknology is the exclusive Sonim supplier to Vodafone for workforce mobility solutions.

"Tracknology offers a complete work order management and dispatch solution tied to data capture and electronic forms on the Sonim XP3-Quest, including GSP tracking," explained Stephen Walsh, director of Tracknology.

Late in 2009 Tracknology moved its headquarters from Melbourne to the Innovation Centre, which is located at the University of the Sunshine Coast. www.tracknology.com.au

Library system tied to new interface

The Libero library software from Queensland developer Insight Informatics has been integrated with a new generation interface known as LibraryThing for Libraries. The integration with the "catalogue enrichment tool" enables Libero users to provide patrons with a range of Web 2.0 features and interactive content, explained Sam Patane, founder of Libero.

The interface also provides users with direct access to a community of more than 900,000 book lovers. "This is a fantastic way to socialise your library and help patrons find new books to read," Patane said. www.libero.com.au

Transport developer buys scheduler

Australian transport and logistics solutions developer TransLogix has acquired Transit Computer Systems, which has developed the Odyssey routing and scheduling tool. Anselm Waterfield, managing director of TransLogix, said the customer bases of the two companies are complementary, with TransLogix typically supporting transport, logistics, and freight operators, while Transit has sold into organisations that use their specialist fleets to service their own businesses.

With the acquisition completed, Nicola Williams, managing director of Transit, will become general manager of TransLogix's Transit division. www.translogix.com.au

Business Briefs

- John Cameron — a developer of the SEATS software for the ASX — is back in Australia doing what he does best. After leaving Swedish company Orc Software, which bought his company Cameron Systems in 2006, John established Cameron Edge, which donates all income from sales and services to charity. The company's latest offering is software for reporting short positions to ASIC, which will become mandatory in April this year. Evaluation copies of the software are available from the company at no charge. <http://cameronedge.com>
- Human resource outsourcing business Talent2 has agreed to acquire Sugar International, which provides education and training services to organisations in Australia and NZ. The acquisition will be funded by a fifty-fifty mix of debt and shares. www.talent2.com
- Application delivery specialist F5 networks has appointed Westcon Group a distributor for Australia and NZ. Westcon will distribute F5's products to channel resellers. www.westcongroup.com
- South Australian Web solutions provider CDAA has been appointed the first Australian Gold Partner of open source content management systems developer DotNetNuke Corporation. www.cdaa.com.au
- British company Voice Commerce, which provides electronic payment solutions for goods and services, has selected Melbourne-based company Majitek as a reseller. www.majitek.com

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RUST e-RESEARCH

Recovery ahead for ANZ services

The Australia and New Zealand IT services market will show a modest recovery with growth tending above 4.5 per cent in 2010, according to Ovum's research model. Even with such a relatively positive forecast, the market will not see pre-recessionary growth levels until the start of 2011 at the earliest, the company's forecasts show.

A/NZ has passed through the bottom of the economic cycle and is rebounding (albeit relatively conservatively) into the post-crisis world in a healthy position. This is mostly due to the positive economic performance from Australia, which did not technically drop into recession during the crisis.

By the end of the forecast period in 2013, the ANZ IT services market will grow to more than \$A14 billion. "A substantial level of interest is being shown by IT services vendors in the A/NZ market, be it from a consulting-led view and the associated uptick, as well as driving into some of the more non-traditional verticals, such as chasing the money in utilities and public sector. Of the OECD economies, A/NZ is currently leading the pack in terms of economic performance and will see further influx of investment that will drive the services market to pre-recession growth levels by 2011." commented Jens Butler, principal IT services analyst with Ovum.

"The recession did impact the IT services market in A/NZ to some extent, spread across a number of sectors and services, with consulting being hit relatively hard", added Butler. "However, this area has rebounded strongly towards the end of 2009 within a number of key verticals and is leading the investment charge into 2010."

Infrastructure outsourcing and support services have shown consistent strength over the past couple of years and been the "safe harbour" for many service providers during the GFC, with the top five vendors having increased their proportion of the overall market to over 50 per cent.

Overall, this reflects a relatively rosy picture for the region's second largest IT services market and with the upswing in confidence within the business community; it does bode well for A/NZ going forward.

Good signs for telco growth

The communications market will confidently shrug off any remaining financial crisis inhibitions and demonstrate a solid performance in 2010, according to IDC.

The company's top 10 predictions for Australian telecommunications in 2010 focus on growing data consumption in both fixed and mobile broadband networks, as well as examining the increasing demands for data services.

"With Australia's economy already showing healthy signs of recovery, the hardware side of the communications market should see a return to positive growth, as large ICT transformation projects that have been on hold in 2009 start to take shape", said David Cannon, telecommunications program manager at IDC Australia.

"The mobile device market, and particularly converged devices remained immune to the crisis.

This will further intensify in 2010 as device vendors race to curb the influx of iPhones and scramble for market share", noted Mark Novosel, a market analyst in telecommunications at IDC.

The company's top 10 predictions for 2010 are:

- Macroeconomic predictions for Australia 2010 point to a stable recovery;
- NBN Co and Telstra strike a deal but still no fibre rollout on the mainland in 2010;
- Mobile broadband subscriber growth will decline but handset data-packs will surge;
- Converged mobile device growth will surge, as vendors flood the market with devices to compete against the iPhone, with mobile data becoming essential;
- Multiple new IPTV and video-on-demand services will launch — the end of the video store is near;
- The LAN market will bounce back due to a combination of both service provider and enterprise investment;
- Mobile video demand will stall as consumer frustration swells;
- Mobile device operating system consolidation is now imminent;
- Application-aware networking vendors are ripe for acquisition;
- Next-generation mobile messaging will hit a tipping point and start to eat into SMS and MMS revenues.

Continued on page 6 >>>



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RUST eRESEARCH

Continued from page 5

Games sales prove resilient in 2009

Australia's interactive gaming and entertainment industry continued to hold its own by achieving a record sales result of just over \$A2 billion for the 2009 calendar year.

Despite the challenging economic climate, sales data compiled by GfK Retail and Technology Australia revealed video and computer gaming sales hit a record of \$A2.05 billion, an increase of four per cent from 2008. The data included all sales from hardware, gaming peripherals, and traditionally boxed software, yet excluded revenue generated from online retail sales, downloadable content, online games subscriptions, and games delivered to mobile phones.

Family games remained the key to the industry's stability, proving to be the best selling genre for the second year in a row. Twenty-seven per cent of all games sold were from the family games genre, up 11 per cent from 2008. The second most popular genre was action, which made up 15 per cent of all games sold.

Ron Curry, CEO of the Interactive Games and Entertainment Association (iGEA), said that the healthy sales results highlighted the buoyancy of Australia's video and computer gaming industry, particularly compared to overseas gaming markets that have not seen increases in sales due to the economic turbulence of the past 12 months.

"Australia's interactive entertainment industry continues to maintain sales despite the global economic slowdown. Video games remain a popular household pastime that can be played by the entire family. Whilst a modest increase, we need to view this against a very tough economic environment and avoid comparing it to last year where consumers used their Government stimulus package to invest in a form of entertainment that brings the whole family together and can be enjoyed time and time again," said Curry.

No Xmas holiday for spammers

Spammers have launched new campaigns related to 2010 events to sustain the high levels of spam experienced toward the end of 2009, according to Symantec's recently published January 2010 MessageLabs Intelligence Report.

At the start of 2010, we were inundated by the typical special New Year offers for pharmaceuticals, fashion accessories and watches, weight loss products, loans and jobs. At its peak, spam related to the New Year accounted for 7.7 per cent of all spam on a single day and more than 50 per cent of New Year-related spam was sent by the Grum and Cutwail botnets combined. Spammers are now moving away from the New Year themes and are expected to next latch onto Valentine's Day-related spam topics.

Spammers and phishers have also been quick to take advantage of the tragedy that struck Haiti to generate advanced-fee fraud scams. As many countries seek to offer humanitarian aid and relief, the scammers are looking for ways to exploit those donation efforts counting on the public's concern and desire to help to cloud their good judgment.

With 83.4 per cent of spam originating from botnets at the end of 2009, MessageLabs Intelligence analysts

calculated that the remainder of spam, 0.9 per cent — the equivalent of 900 million spam e-mails, originated from free Webmail accounts. More than 79 per cent of Webmail spam came from three well-known free Webmail service providers.

"Despite the best efforts of the Webmail providers to prevent this abuse of their services, there is still a viable market in the underground economy for buying and selling legitimate and usable Webmail accounts," said Paul Wood, senior analyst for MessageLabs Intelligence.

In December 2009, a new zero-day vulnerability in a popular version of a .PDF viewer was disclosed. The attack targeted high level individuals in the public sector, education, financial services and large international corporations. Arriving as a .PDF file containing embedded Javascript, the attack also involved a social engineering aspect which varied according to the individual and organisation being targeted.

In December 2009, MessageLabs began tracking a new botnet called Lethic, which quickly accounted for 2.5 per cent of all spam. Within the first week of January, spam from Lethic increased to less than four per cent of all spam and then peaked at 5.25 per cent of all spam on January 8 before dropping off to nothing.

"Lethic seems to have disappeared almost as quickly as it arrived", Wood said. "The spam it had been sending was roughly an even mix of pharmaceutical and replica watch spam."

Gartner positive about 2010

Gartner has joined the ranks of positive prognosticators for 2010 by forecasting that slow but steady improvement in the macroeconomic environment in 2010 should support a return to modest growth in overall IT spending. Worldwide IT spending will reach \$US3400 billion in 2010, a 4.6 per cent increase over spending in 2009.

Although modest, this projected growth represents a significant improvement from 2009, when worldwide IT spending declined 4.6 per cent. All major segments (computing hardware, software, IT services, telecom, and telecom services) are expected to grow in 2010

The Rust Report

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REVOLVING DOORS

Identities gonged for Australia Day

Industry identities Dr Peter Jones and Di Ryall were named members of the Order of Australia in this year's Australia Day Honours List.

- Dr Jones was recognised for service to the information technology industry, to the promotion of Internet-based communications networks, and to science education. His long and colourful career has extended from the design of early supercomputers in the UK and US, where he became good friends with the legendary Seymour Cray, to academic placements in Australia. Following his "professional suicide" by returning to Australia in the early 1980s he became a serial entrepreneur, founding about 15 technology companies. Still active in the industry, he has recently been involved with the Australian Centre for Advanced Computing and Communications (ac3).

- Di Ryall was recognised for her service to business through executive roles in the IT industry, as a mentor to women, and to the community. She succeeded Steve Vamos as managing director of Apple Computer Australia in 1997 but resigned in 2001 due to ill health (Rust Report, Aug 24 2001, p8). More recently she has run a mentoring program for women in business through her company Xplore.

Altium appoints China boss

Australian company Altium, which develops electronics design software, has appointed Roger Shen CEO of its business in Greater China. The appointment marks an upgrading of the Chinese operation from sales region to regional business.

Shen, who has Australian citizenship, was previously with the Maximo unit of IBM's Tivoli Software. He has also worked for Macquarie Research in Sydney and System Software Associates in China.

Payments group poaches Amex exec

Transaction Network Services, a US provider of transaction payment services, has appointed John Banfield senior vice president and general manager of its payments division in the Asia/Pacific region. He was previously with American Express as regional vice president of its international division.

Gibson joins Adaptra as GM

Ian Gibson has been appointed general manager of consulting and application services business at Australian company Adaptra. He was previously with NAB's technology operations, and has also worked for Link Market Services and Accenture.

Internode CIO snatched from board

Adelaide-based IP carrier Internode has appointed Frank Falco CIO some 18 months after he joined the company's board. With a long and entrepreneurial involvement in the ICT sector, Falco was previously general manager of business development at Sydney company Finantix, and was also operations manager at YourAmigo, and founding CEO of Recall Design, in which MYOB acquired a majority stake.

Prof takes a role with educators

Australasian company Software Education has appointed Philippe Kruchten — Professor of Software Engineering at the University of British Columbia — academic in residence for 2010. Kruchten will join the company next month to provide expert advice on the enhancement of its software development courses.

New faces for research council

The Australian Research Council's advisory council has undergone changes following the retirement of Professor Margaret Seares and Professor Arun Shama. They have been replaced by Professor Emeritus David Siddle, affiliate researcher with the University of Queensland, and Professor Robyn Owens, pro vice chancellor of the University of Western Australia.

Around the Traps

- Tandberg has appointed Stiven Lazaroski key account manager for the enterprise southern region. He will be based in Melbourne. Lazaroski was most recently with Telstra, prior to which he was a solution consultant with KAZ. He has also worked in a variety of roles for Optus.

- Ryan O'Hare has resigned from the board of telephony products and services provider Tel.Pacific. He has been replaced by Ilario Faenza, who founded the Virtel Group in 2001 and oversaw its sale to Comtel in 2007. He was appointed an alternate director to O'Hare in October 2009.

- Think Education Group — a subsidiary of Seek — has made a number of managerial changes following the resignations of Mark Rohald, CEO of Think Education Group, and Anthony Bohm, CEO of Think Colleges. Both will remain directors of the group. With their departures, Peter Everingham has been promoted to managing director of education and Michael Ilczynski has taken on the expanded role of strategy director, education.