Oracle Corporation et al v. SAP AG et al Doc. 544 Att. 8

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HEADLINE: This week in OpenWorld news;
At Oracle's OpenWorld conference, Michael Dell chides the Lenovo-IBM deal. Also: Oracle chief Larry Ellison' deja vu keynote speech.

BODY:

Michael Dell, whose namesake company is the top-ranking PC maker, is not a big fan of the acquisition.

During a question-and-answer session at Oracle's OpenWorld conference, the Dell chairman said a deal between Lenovo and IBM would likely follow a pattern seen in many mergers where two very different organizations fail to mesh.

"We're not big fans of the idea of taking companies and smashing them together," Dell said. "When was the last time you saw a successful acquisition or merger in the computer industry? It hasn't happened in a long, long time...I don't see this one as being all that different."

Some of Dell's top executives also disparaged the "big iron" approach of building large, powerful servers--a dig at rivals IBM, Sun Microsystems and HP. Those competitors see expensive, refrigerator-size servers with dozens of processors as a good way to tackle high-end corporate computing tasks.

Dell prefers clusters of lower-end systems linked over a high-speed network. A crucial component in making server clusters useful is a database that can spread across them--a database such as Oracle 10g, Dell touted during a keynote speech.

Dell's partnership with Oracle is aimed at luring customers away from Sun servers running the Unix operating system.

Indeed, few companies were off-limits to Dell, as the executive who oversees the partnership with Red Hat said the Linux seller needs to lower its prices, or risk losing customers to free versions of the open-source operating system.

"We believe Red Hat Enterprise Linux 3, for the small and medium-size business market, was out of the price range of these customers," said Judy Chavis, director of business development for Dell's enterprise product group.

And Dell has the marketing muscle to make its opinions clear. Indeed, Red Hat's pricing was instrumental in Dell's decision to sign its October pact to sell Novell's SuSE Linux.

With so many things on his mind these days, coming up with fresh material for a keynote speech didn't appear to be on Oracle boss Larry Ellison's list of priorities. Ellison virtually recycled his speech from last year's conference, warning thousands of tech professionals gathered to hear him speak about the dangers of "data fragmentation."

He also promised that if the takeover attempt is successful, Oracle will finish building new versions of programs that PeopleSoft is now developing and eventually merge those products with Oracle's own.

"We're going to invest more in the product than either company could have done independently," Ellison said. "And we're going to give SAP a good run for their money in this business."

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