AlwaysON Summit at Stanford[1]
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We attended only part of this very interesting event.

The Silicon Valley has made the most significant contributions to the Internet in terms of hardware, software, middleware, search, e-commerce, etc. Interestingly, to see how today's leaders could be tomorrow's laggards or no-shows, the following table shows the leaders in search:

Table 1. Search Engine Leaders

1997	2009	
Vendor	Vendor	Market Share (%)
Infoseek	Google	65
HotBot	Yahoo!	20
Alta Vista	Microsoft	8
Excite	Ask	3
Yahoo!	AOL	3

Regis McKenna says 2% of the market leaders influence the other 98%. There have been only three notable high-tech IPOs in the last year — LogMeIn, OpenTable, and Rackspace. Sequoia Capital's 56 Slide Presentation of Doom[3] is still looming.

Fireside Chat

Michael Moe, co-founder and CEO, NeXtAdvisors, interviewing Bill Campbell, Chairman, Intuit and Executive Advisor.

Bill was the head football coach at Columbia University before he transitioned to high-tech. Bill reflected on his long career in Silicon Valley and gave his opinions on people who have changed the Valley.

The late Mike Homer of Netscape fame was a great product marketer. You should have a great product because you can't make good chicken salad out of chicken you-know-what! Great products create great teams. Don't mistake charisma for leadership. Your title makes you a manager; your people make you a leader. It's really tough for big companies to innovate because of inertia. There are exceptions: Lou Gerstner turned IBM into a service company; that was innovation. Too many companies focus only on their current product and not think outside the box. Amazon's Jeff Bezos defied Wall Street, stuck with his business model, and wowed the world. Google's Eric Schmidt has great judgment and listens to his management team. Steve Jobs is brilliant and one of the gems of the Valley. Everything he does is perfect and he surrounds himself with people who think like he does. Marc Andreessen is always ahead of the crowd and thinks of the evolution of technology. Vinod Khosla is in his own world, can see stuff, and is a brilliant VC. John Doerr is a legend. Bill Gurley looks at trends.

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[1] http://alwayson.goingon.com/ecom/productview/24424
[2] http://www.itnewswire.us/
[3] http://www.techcrunch.com/2008/10/10/sequoia-capitals-56-slide-powerpoint-presentation-of-doom/

Panel on *The Rainmakers in Cloud Computing*

How big is the Cloud Computing (CC) market? Anywhere from $40 billion (Gartner) to $160 billion (Merrill Lynch). Utility computing was discussed years ago (by Scott McNealy) and technology has improved since then. Gartner says by 2011 there will be 500 million virtualized desktops. One panelist said everything will go to clouds; another said that's crazy; it'll be a hybrid world. TIBCO has an SOA platform that runs in the clouds, with the ability to deploy instantly, to scale, no management headaches, and obviate IT. Cloud opens up a new opportunity for business units (BUs). You have to sell CC to both IT and BUs. The horizontal market (Workday, NetSuite, Salesforce.com) is too crowded. CC will be an enabler of new software platforms, without expensive IT infrastructure. Disaster recovery, backup, and business continuity will be big too. Most CC vendors aren't making any money, nor are they spending much. How can clouds work together? As more enterprises adopt CC, there will be more private clouds. Building cloud is hard; there are many issues about management. Sun uses the concept of virtual datacenter. There is a lot of work to do in network management. CC decreases the barrier to adoption—you don't send two folks to sell to Citi Group. Long term there will be market-specific clouds, e. g., a HIPAA-compliant cloud or a CGR (compliance, governance, risk) cloud. Where do cloud businesses fail? When they lack security; remember the recent break-in at twitter. Security is the #1 impediment for CC adoption. It is not technology, it's the social aspect. IBM, HP, and Sun are working towards enterprise clouds, not consumer clouds. "If I were in IT, I'd start experimenting with CC." Problems are opportunities, hype always precedes the market. Virtualization and CC will help; CC is journey and not a destination.

Panel on *Where's the short-term green in green?*

There is a lot of hype in clean/greentech, just as in cloud computing, but where is the real money? Lighting is a low-hanging fruit. Draper Fisher Jurvetson has invested in two lighting startups. Walmart found it could increase meat sales by 10% by just changing the lighting in the meat section. How about smart grid? There are a million Silver Spring Networks meters installed today. Eventually, PG&E will install smart meters in all its customers' homes. We'll then have broadband over power line in N. California. Water is a difficult investment area; only 4% of cleantech investment goes into water. There is no water metering for agriculture in the Central Valley. About $7 trillion of food is transported worldwide annually, but one-third goes to waste before it reaches the consumers. Water is the most mispriced commodity in the world. Water is the next oil, there will be wars over water. Ironically, the largest cost of water transportation is energy, the largest cost of energy production is water!

One VC said, "We've been inundated with requests for photovoltaic (PV) investments. China and Japan are anxious to invest in U. S. companies involved in PV." As for PV, California so far has been like Texas; big hat, no cattle! Within a few months there will be an explosion of PV in CA—about 20 MW monthly. Invest in well-established solar panel manufacturers. Many solar installers will be acquired by larger players. Look into companies like Bright Source.