

## Microsoft - Alive and Kicking

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The other day I had a rather odd conversation with a journalistic acquaintance of mine who writes predominantly for the IT trade press.

Odd though it was, this conversation yielded one or two interesting truths. These were truths which I believe are quite markedly absent from so much of the propaganda that gets spouted around the IT industry these days, and truths which I would like to take this opportunity to share.

The journalist, whom we shall call say, Bob; wanted my thoughts on the ongoing adventures and travails of a certain major software company whose name - recently dragged with great pomp through the courts - I think we can all guess.

Why exactly he wanted my opinion I can't remember precisely, but it wasn't the line of questioning that was important so much as his response to my - what I thought were pretty reasonable - answers.

As I recall, my view was that whatever might happen in the short term, Microsoft is altogether too big and too successful an entity to be hurt by its current situation in any lasting way. I also intimated that in one guise or another therefore, Microsoft is likely to be around for the duration and that the market shouldn't be fooled by into making a judgement on its future based solely on the price of its shares.

Barely concealing his surprise, Bob said that it was the first time that anyone he had spoken to (he had been sounding out a number of other contacts) had responded in such fashion. I asked him to explain and he duly did so.

It is almost an unwritten rule in the IT industry, he said, that unless you work or PR for Microsoft you are dutifully and morally bound to harbour a healthy distrust and dislike of all that it is and stands for.

The analogy he actually used was that working in IT is now a little like following Premiership football. Specifically, if you support anyone but Manchester United you must on no account, on pain of death, be seen to say anything remotely flattering or nice about Alex Ferguson's men. They are the red scum, they are the enemy of all that is good and you WILL hate them or pay the penalty (no pun intended).

Such, it seems, is the depth of anti-Microsoft feeling around the industry. Indeed, with each fresh report of a US Department of Justice victory, or news of a fall in the share price or even

the departure of another director, it appears that the industry knives are being sharpened ever more fervently.

The way Bob described the current landscape conjured up all kinds of pictures. Software company CEOs sitting Fagin-like around a brazier, rubbing fingerless-gloved hands together and deciding how they might divvy up the market-share that will suddenly become available in the wake of Microsoft's demise.

Er, sorry to disappoint you boys, but that's not quite how it works.

First of all it's important to note that the weight of feeling that I mentioned seems to be rooted in the industry, NOT (for the most part) among the company's millions of end users. That, for obvious reasons, is an important point.

Secondly we are talking about an organisation whose name and logo, as I write this paragraph, appear at the top of my word processing screen, on my Internet browser, on my email client, on the box of my PC and on my mouse. That's a pretty influential company. Does the statistic 88 per cent of world desktops ring any bells?

And if that's not enough to convince certain people that reports of Microsoft's death have been well and truly exaggerated, let's run through a few other numbers.

\$420,000,000. That's the amount by which Microsoft's revenues ROSE last year. At least \$400 billion - that's its market capitalisation despite having invested in or acquired 92 companies in the last five years. £22 billion - the amount the company has in the bank - more than any other US corporation. 33 - Microsoft's percentage share of the server software market in 1999. And 30 - the percentage by which its revenues and profits are rising year on year.

Does this sound like a company in the doldrums? No of course it doesn't, but then any judgement I or anyone else might care to make on Microsoft can only ever be relative. Whatever slant you put on it in real terms Microsoft is still a vast, behemoth of an organisation. So yes, I feel pretty justified in my opinion. Make no mistake Microsoft is here to stay whether certain people like it or not.

Perhaps returning briefly to the football analogy and to Manchester United in particular will help to put the whole thing in some kind of perspective.

Let's ask ourselves why the proportion of the football-watching population that doesn't support Manchester United seems to hate them with such undiluted zeal. It's their arrogance, people say, their swagger, their annoying luck, their pretty boy players with their skinny wives and most of all, their money.

Now if I didn't know better I'd say that all this sounds a lot like jealousy... but nah, it couldn't be... surely?

Bill Gates marrying a Spice Girl? Now there's a disturbing image.

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