

January 11, 2012  
(1/11/12)

**iYear Two**  
**(2010 Being The “Zero Index” Into the i-Time Array)**

A year later, I'm going to wear the CTO “hat” here at MLD for another minute. Mainly a review and update of last year's musings: [http://www.mldragon.com/2011\\_0111\\_iYear1.pdf](http://www.mldragon.com/2011_0111_iYear1.pdf)

For the equities evaluators, here's the year-over-year data (ok, “CFO Hat” if you will):

Name/Stock	Jan 2011	Jan 2012	(extra)
AAPL	\$341.64	\$418.03	
IBM	\$147.28	\$181.59	4xDividends
GOOG	\$616.87	\$623.14	
RIMM (berry)	\$62.89	\$15.51	
HPQ (HP/Palm)	\$45.43	\$26.50	4xDividends – Palm/WebOS Comatose

What did Apple do during iYear One:

- iCloud
- iOS 5.xx (multitasking and more (and more) stability and speed)
- iPhone 4s
- iPad 2
- Hyper-Expanded the User-Base (Partnered with Verizon)
- Faster/Easier development environment and appStore process(es)
- appStore (iTunes like store for the old-schoolers) for Mac
- MacBook Air and Mac mini

What did all the others do in the Tablet and/or Portable/Phone/Hand-Held Markets to compete and grab away market share from Apple:

- Google Appstore(s) [or individual droid device stores]
- Google/Android in/on more devices
- (way below the mainstream-radar): IBM Mobile Software (“cloud” or device independent e-Ware)
- Put out and pulled back a lot of stuff
- webOS announced as “Open Source” December, 2011

The “of note” for myself, personally, during 2011:

- iPads everywhere (especially the AARP set)
- iPhone resurgence in Small Town, USA (the Verizon thing)
- Face Time meetings gone mad – even more “bonkers” than Skype – “videophone” appears to have taken hold in the form of Face Time (I know MS would say Skype and Net-Meeting before that paved the way but it is what it is: iPeople are mad for Face Time)
- Got “the monster” app in the appStore

There's the CTO discussion – well, the CTO Notepad. On the “musing” front I wonder what is left for Apple (intentionally or not) to shove into the “Whatever happened to ...?” file. Or, who knows, Microsoft might blind-side everyone with “8” and some MSecret device this year. Looking into the crystal ball for iYear2: “It is unclear.” Just don't try to read the “signs” off of HP's Palm (yuk yuk yuk).

Part of the “lack of clarity” comes from trying to keep pace with Apple's hyper-or-manic product and software release schedule – from a development standpoint it is dizzy-making.

Here's the ideas for management to consider during 2012 (aka iYear 2):

- iOS development: get more done, get more published, get **capitalized**

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