



August 2004

RFID Update

We are providing this document to keep you informed on our latest activities and observations related to RFID technology. Please let us have your comments and feedback. Thank you.

Recent Activities at Big Chief Partners

We are developing Technical Architecture and RFID Strategy for BEA Systems (<http://www.bea.com>).

We are assisting with device support strategy for RFID router and appliance developer Blue Vector Systems (<http://www.bluevectorsystems.com>).

Peter Winer joined the advisory board of Star Map, based in London, England. Star Map is an early stage startup that is using location technology to solve critical tracking problems for financial services companies (<http://www.star-map.net>).

Peter Winer is a member of the Executive Advisory Committee for the Frontline Solutions Conference and Exposition on September 13 – 15 in Chicago. (<http://www.frontlineexpo.com>). He is also moderating two panel discussions titled, RFID Middleware and Web Services, and RFID Networks.

Peter Winer is conference chairman for two conferences in the fourth quarter. The

Global Supply Chain RFID/GTIN Standards Conference will be held on October 14 in Toronto Canada (<http://www.softmatch.com>). The RFID Developers Conference will be held in San Mateo, California on November 9 – 10 (<http://www.scievents.com>).

Peter Winer authored, "The Missing Piece" for Frontline Solutions magazine. The article appeared in the July 2004 issue of the magazine. (<http://www.frontlinetoday.com>).

Outside the RFID world, we are developing technology and user interface for Determina based in Redwood City, California. Determina is a leading edge developer of Host Intrusion Protection security software (<http://www.determina.com>).

Chris Meisl and Alice Lankester are developing the online application for MaxGenRx based in San Francisco, California. MaxGenRx is developing solutions that reduce prescription drug costs for self-insuring corporations (<http://www.maxgenrx.com>).

RFID Infrastructure: Networks, Middleware and Applications

RFID infrastructure is a key area of focus at Big Chief Partners. Since early 2001, we have been involved in developing infrastructure software for RFID and defining strategy for our clients. Our earliest experience was developing the WebLink infrastructure for Philips Semiconductors. Since then we have worked with startups and established companies to help them optimize their strategy for RFID infrastructure. We have also presented numerous panel discussions at RFID-related conferences.

During the last two years, a large number of

companies have staked claim to different segments of the RFID infrastructure space. These have included pure-play startups that have focused exclusively on RFID as well as opportunistic companies moving into RFID from adjacent areas.

The pure-play startups gaining the most traction have been focused on the distributed networks that drive RFID. These include original players such as OAT Systems, ConnecTerra and Globe Ranger. They also include relative newcomers Blue Vector Systems and RF Code.

RFID Infrastructure (continued)

These companies all have different approaches but the common thread is collecting information from distributed and potentially heterogeneous groups of RFID readers. The collected information is corrected, filtered, aggregated and delivered upstream to middleware, applications and business processes that capitalize on the information in a business context.

Also, a cluster of established companies that focus on Middleware and Enterprise Application Integration (EAI) have seen the opportunity of moving into the RFID space. The most prominent of these are IBM, TIBCO, Sun Microsystems and webMethods. More recent entrants include BEA Systems and SeeBeyond.

These companies all view RFID as an

emerging source of information for visibility and tracing. The products from these companies can enhance RFID information by connecting to outside data sources. They can also transform information into compatible formats and apply business rules that add value within a specific business context.

Among these companies, the EAI specialists include TIBCO, webMethods and BEA Systems. These companies provide message brokers that can integrate RFID information with other application information to create composite applications. Some players also provide portal solutions that can be used to build customized views of the integrated information.

Two Panel Discussions at Frontline Expo

During the past 18 months, we have moderated about 10 panel discussions on RFID Infrastructure and Middleware. The panelists have included:

- Reader manufacturers Alien Technologies, Matrics (now Symbol Technologies), SAMSys, Applied Wireless Identification.
- Pure-play startups Globe Ranger, OAT Systems, ConnecTerra and Blue Vector Systems.
- Middleware and Enterprise Application Integration specialists webMethods, TIBCO, Oracle and SAP.
- Representatives from Savi and Venture Development Corp.

Frontline Expo is being held on September 13-15 at Navy Pier in Chicago. For this year's conference, we decided to recognize the emerging stratification of the RFID Infrastructure and Middleware space by moderating two separate panels. One panel covers RFID Networks and the other covers RFID Middleware and Web Services. Each panel is described in more detail below.

RFID Networks

During the past two years, numerous pure-play companies have been launched to provide solutions for collecting and leveraging information gathered from distributed RFID networks. Generally these companies take one of two approaches in providing solutions:

- Server-based software that interfaces with readers, collecting information and processing it for upstream applications.
- Network routers and appliances that provide similar functionality using dedicated hardware.

Increasingly, RFID reader manufacturers are moving into this space as well. Matrics (now Symbol Technologies) and SAMSys have offered proprietary collectors for their readers for more than a year. Recently, Alien Technologies announced a similar add-on for their readers as well.

In this panel we will bring together representatives from four companies that are staking a claim to this emerging space:

**Panels Discussions at
Frontline Expo,
September 13 – 15,
Chicago Navy Pier**

RFID Networks

September 13, 2:45 PM

RFID Middleware

And Web Services

September 14, 2:45 PM

Two Panels (continued)

- Bryan Tracey, Director of Engineering, Globe Ranger
- Prasad Putta, Chief Executive Officer, OAT Systems
- Ken Traub, Chief Technology Officer, ConnecTerra.
- Anurag Mendhekar, Chief Executive Officer, Blue Vector Systems

The panel discussion will be held at 2:45 PM on Monday, September 13.

RFID Middleware and Web Services

News from the RFID Networks space has been dominated by pure-play startups. In contrast, the biggest players in RFID Middleware and Web Services have been established Middleware and EAI specialists. These companies are working to leverage their existing platforms and applications in

the RFID context.

As in other enterprise software spaces, this has created a debate about the need for dedicated middleware and application integration. Also, each vendor offers a different mix of product functions to solve the problem of delivering collected RFID information to enterprise applications.

In this panel we will bring together representatives from three companies that offer middleware and enterprise application integration for RFID:

- Jeff Flammer, Senior Director, BEA Systems
- Andrew Savitz, Director RFID Solutions, webMethods
- Vijay Sarathy, Director, Sun Microsystems.

The panel discussion will be held at 2:45 PM on Tuesday, September 14.

About Big Chief Partners

Big Chief Partners offers strategic advice, research and software development for organizations that want to capitalize on identification technologies, mobile payments, infrastructure, security and RFID.

Starting early 2001, Big Chief Partners first involvement with RFID was developing the WebLink system for Philips Semiconductors.

Clients include technology vendors, customers pursuing RFID deployment, conference organizations and venture investors in the U.S. and Europe.

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