



Open Source Barometer Update

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CMO, Alfresco
June, 2008





Agenda

- Open Source - The World is Changing
- What is the Open Source Barometer?
- Summary of Last Open Source Barometer
- Analysis of Open Source in the G2000 Enterprise Stack
- Analysis by Geography
- Analysis Over Time





Open Source is More than a *Linux and Eclipse* Barbell



Portal/
End User
Application

Siebel Plumtree MS-Office IE

Content
Management

Documentum FileNet SharePoint Interwoven Vignette

App
Server

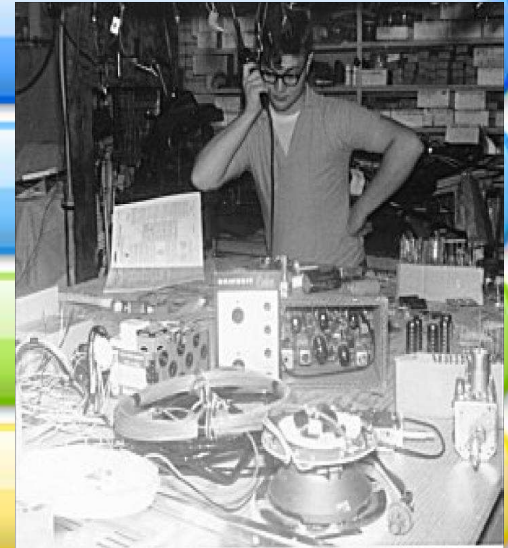
BEA WebLogic IBM WebSphere

RDBMS

Oracle DB2 SQLServer

Operating
System

Windows Unix Mac





Open Source is an Enterprise Stack



Portal/
End User
Application

Siebel

Plumtree

MS-Office

IE



Content
Management

Documentum

FileNet

SharePoint

Interwoven

Vignette



App
Server

BEA
WebLogic

IBM
WebSphere



RDBMS

Oracle

DB2

SQLServer



Operating
System

Windows

Unix

Mac





The Open Source Barometer

- Largest Open Source Enterprise Stack Survey
- Opt-In 52,000 Alfresco Content Community Members
- How and where is Open Source used in the Global 2000 Enterprise Stack?
- Is it a Pure or Hybrid Stack?
- Is there on Leading Player in each part of the Stack?
- Does Usage differ from Evaluation to Deployment?
- Does Usage differ by Geography?
- What are the Trends over Time?





Summary of First Open Source Barometer

- Operating Systems
 - Equal evaluation of Alfresco on Windows and Linux
 - Strong preference for Linux in Production
- Application Servers
 - Strong preference for Tomcat or JBoss vs. leading proprietary offerings
- Databases
 - Overwhelmingly, users test and deploy on MySQL with PostgreSQL second Oracle was the most popular proprietary choice
- Browsers and Portals
 - Firefox most popular
 - Portal Liferay or JBoss
- Mixed stack
- Clear Open Source leader at each level in stack
- USA is the leading country
- Leading European countries
 - France, Germany, Spain, Italy, UK
- Microsoft partnership can have impact on Open Source community momentum





New in Second Barometer

- Which Office Suite do you Primarily Use
- What Virtualization Product are you using Primarily
- How are you planning to Evaluate Alfresco

- Data - January to April 30th 2008
- First Time Publicly Available





Largest Open Source Enterprise Stack Survey



Opt-In
Supplementary Drilldown Surveys



Third Open Source Barometer New Questions

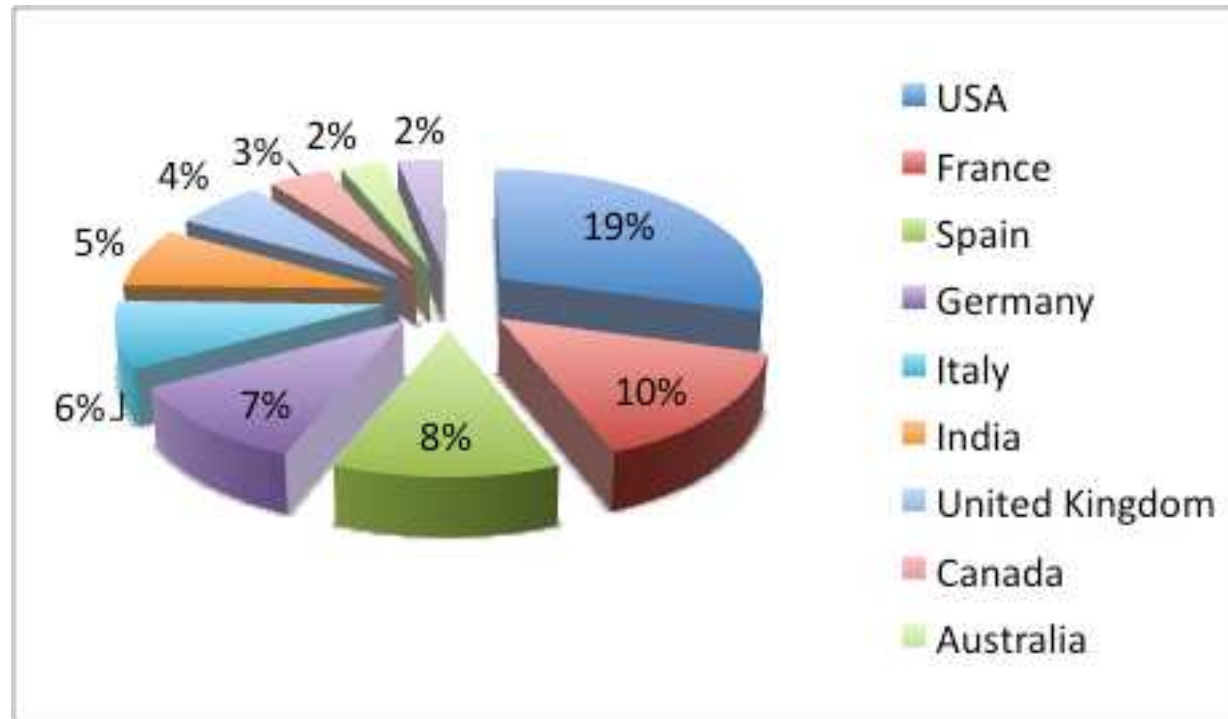
- Operating System
- Application Server
- * Architecture
- Portal
- * Blog
- * Wiki
- * Rich Internet Application (RIA)
- * Business Process Management (BPM)
- * Business Intelligence (BI)

Analyze the Impact of SharePoint



Geographic Analysis

Open Source has a Long Tail

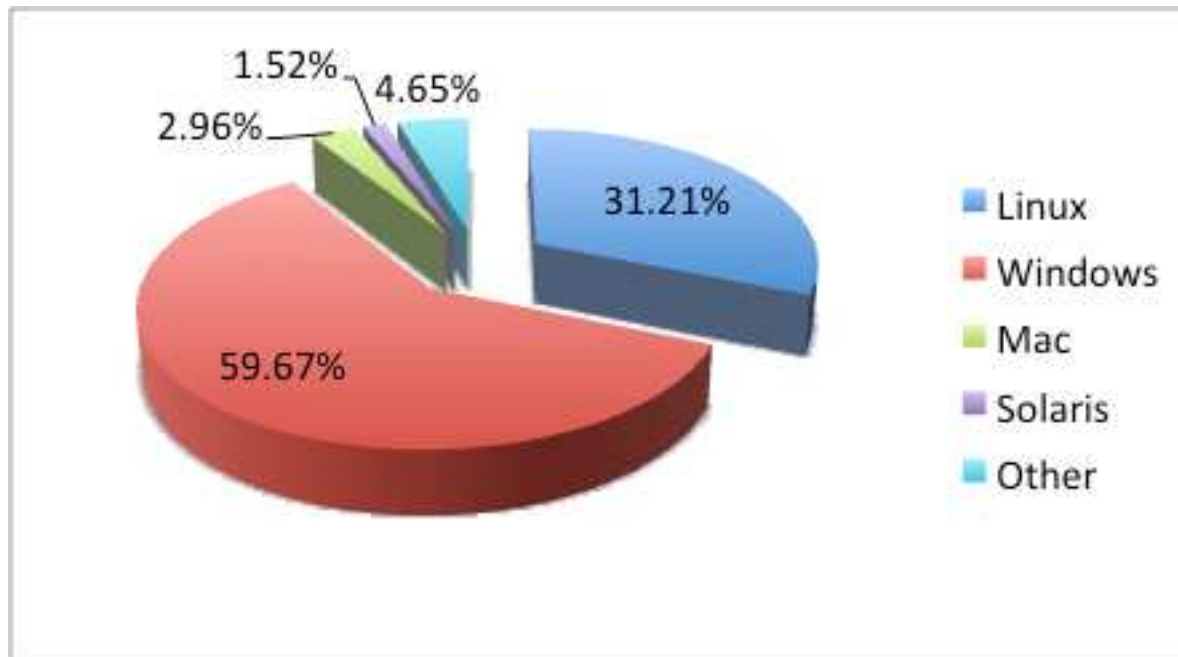


US Largest Individual Country





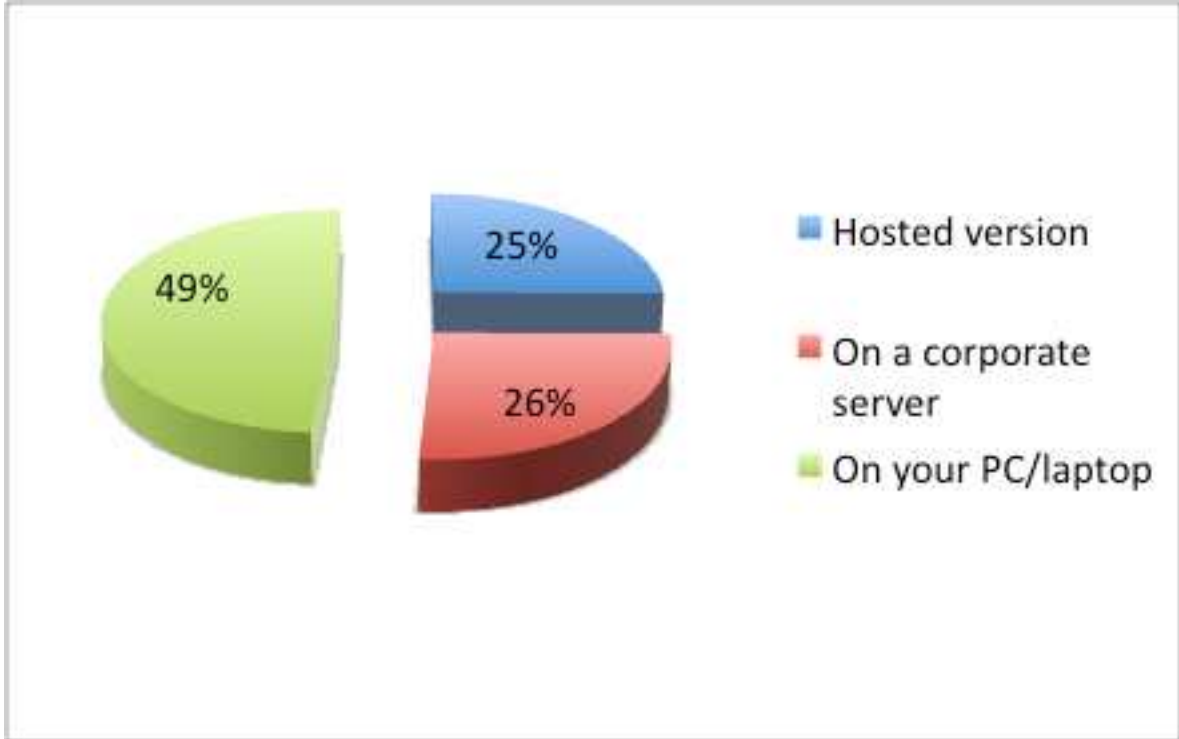
Operating System



Windows is Used Most Often



Trial Environment

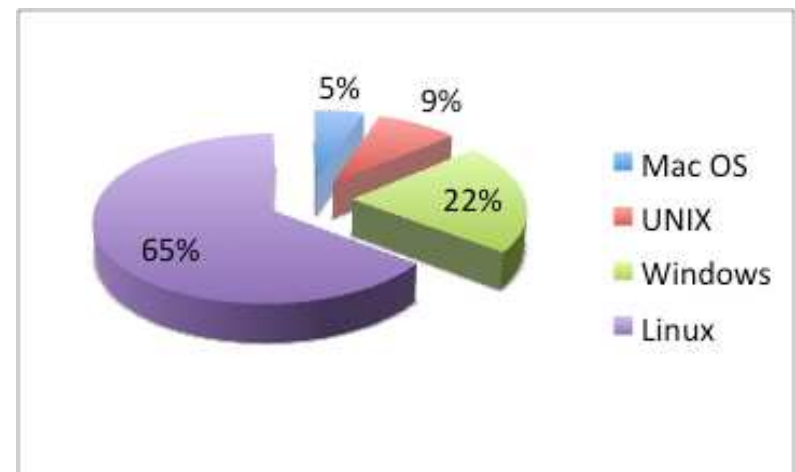
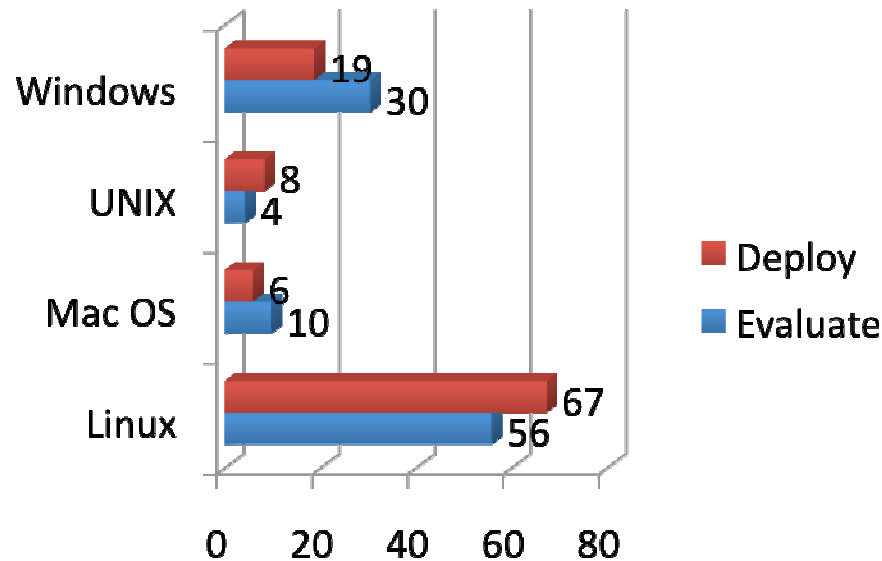


Users Trial on a PC/Laptop
Open Source must be Simple to Install and Evaluate on Windows





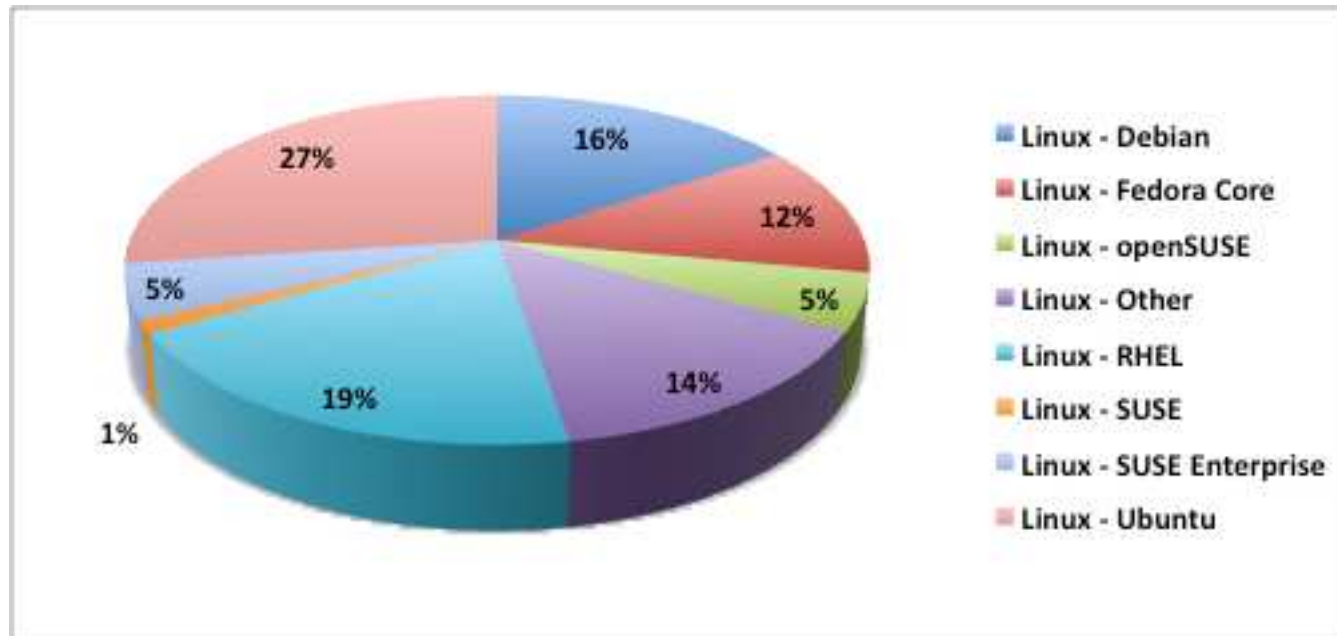
Operating System *Evaluation and Deployment*



User Evaluate on Windows and Deploy on Linux
N.B. Follow-up Survey to Community Members via website and Facebook Alfresco User Group



Operating System *Choice of Linux*



Red Hat is used 31%



RHEL vs. Suse Over Time


Getting Started | Alfresco - Open Sour... | Latest Headlines | Share on Facebook

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Main Page



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navigation

- Main Page
- Community portal
- Recent changes
- Help

search

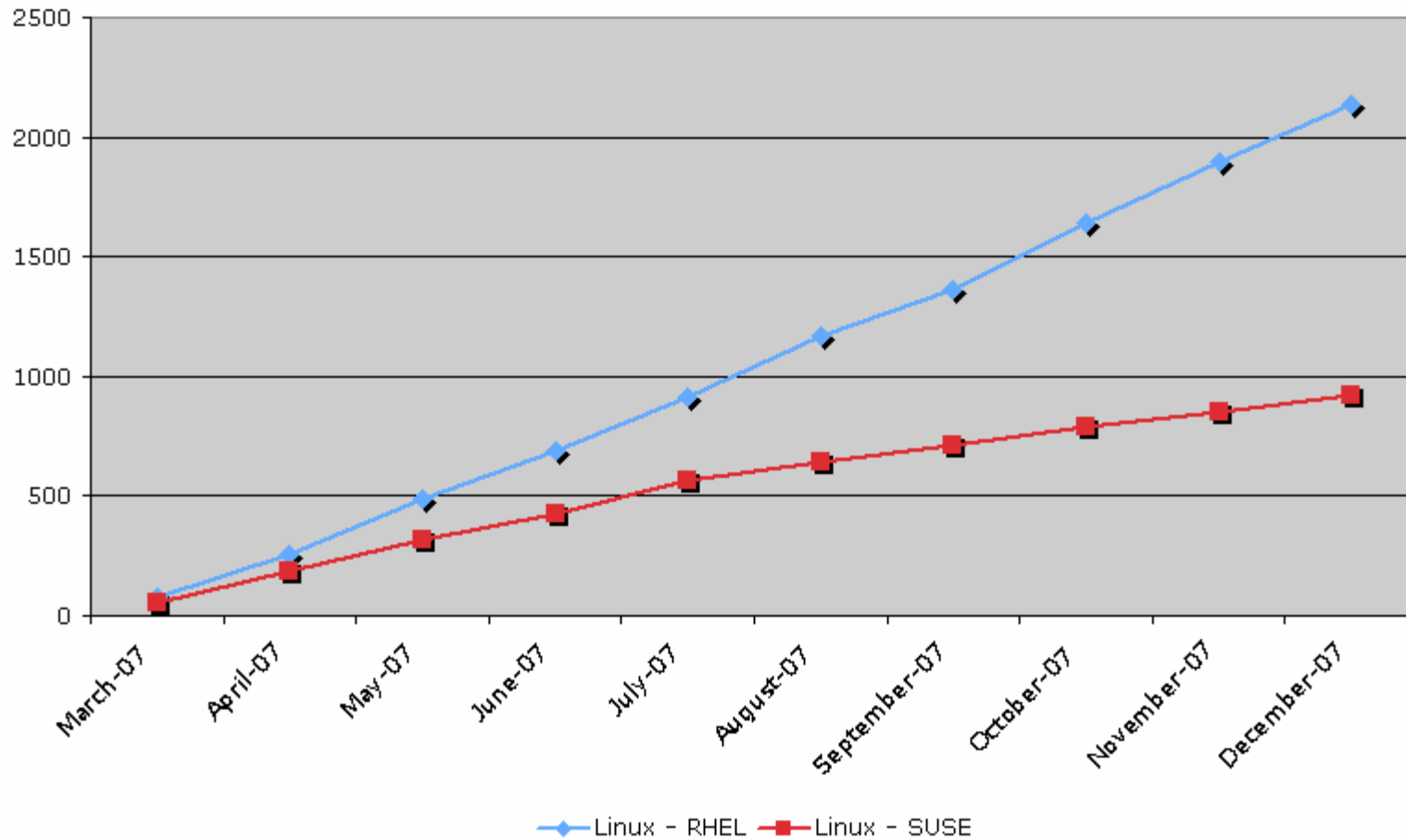
I am leaving

Sorry to say, but I am no longer going to be working on SUSE Wiki anymore. Various disagreements my business have had with Novell have led to my being opposed to Novell's stance in their agreement with Microsoft. In addition, I am now an Ubuntu user and therefore any contributions I can make to the community would be vague and inaccurate at best. I believe Ubuntu is more suited to my needs as a fairly proficient Linux user. I will still check back here occasionally but will no longer be an active administrator.

This means, ***We need a new administrator.*** Anyone who wants to volunteer is welcome to email me at kamatsu@susewiki.org. Nominations will be collected and I will decide who is to be my successor.



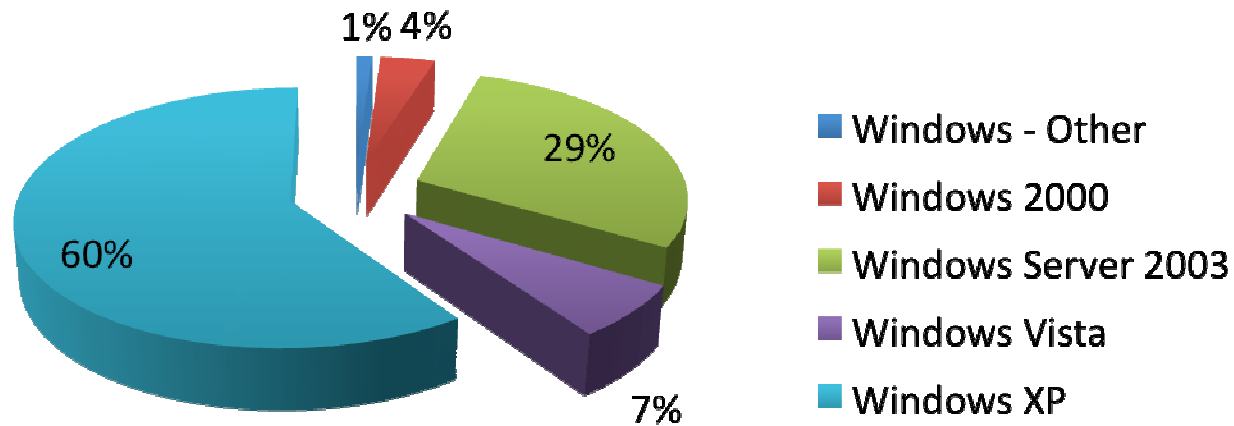
Operating System *RHEL vs. Suse Over Time*



Partnering with Microsoft has an Impact!



Operating System *Windows*

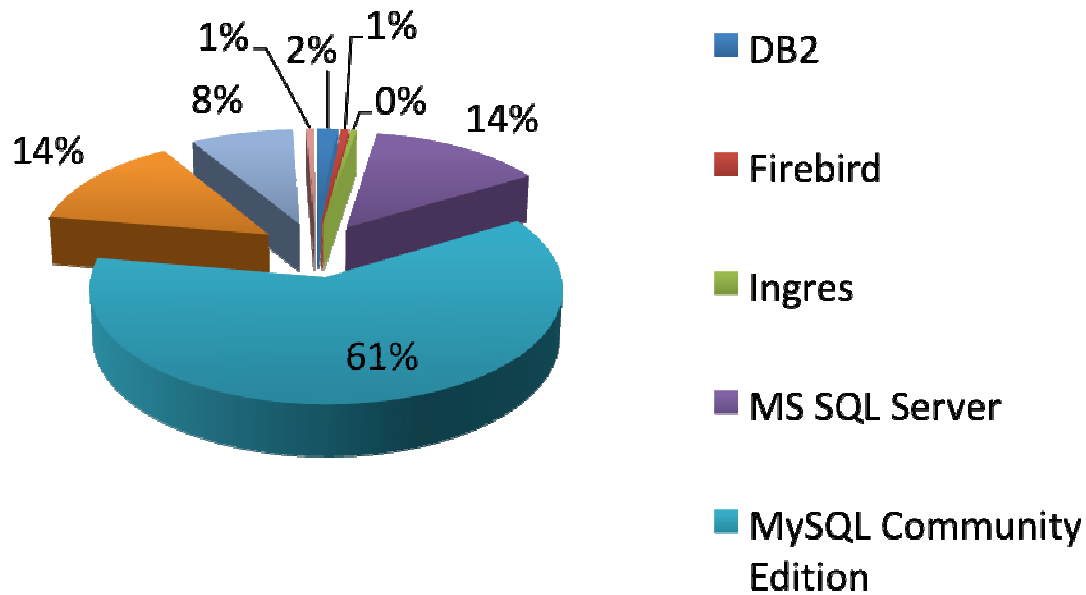


XP and 2003 still dominant
Vista 7% Slow Adoption



Database

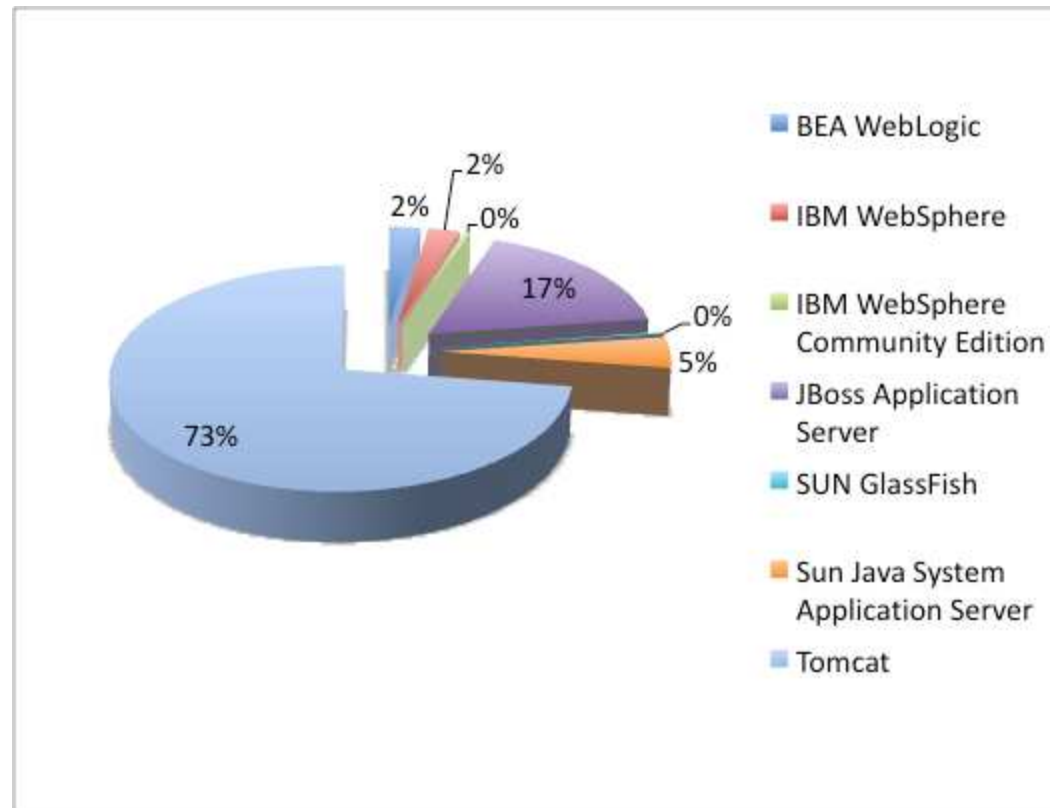
The Sun is still shining on MySQL



MySQL leads
Oracle and SQL Server follow
N.B. None and Other not used in this chart



Application Server

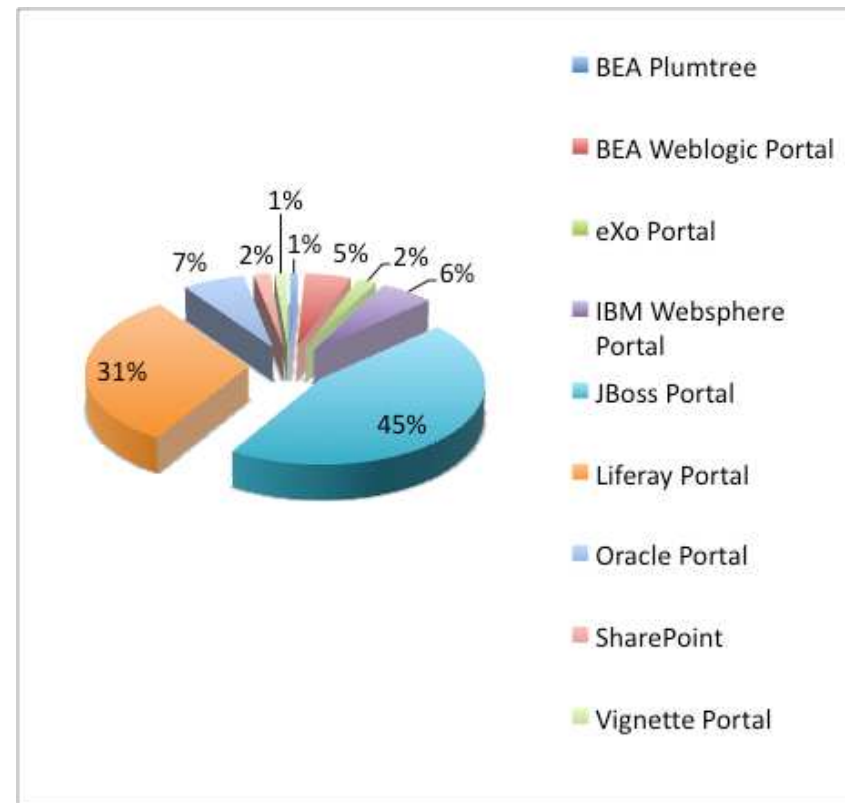
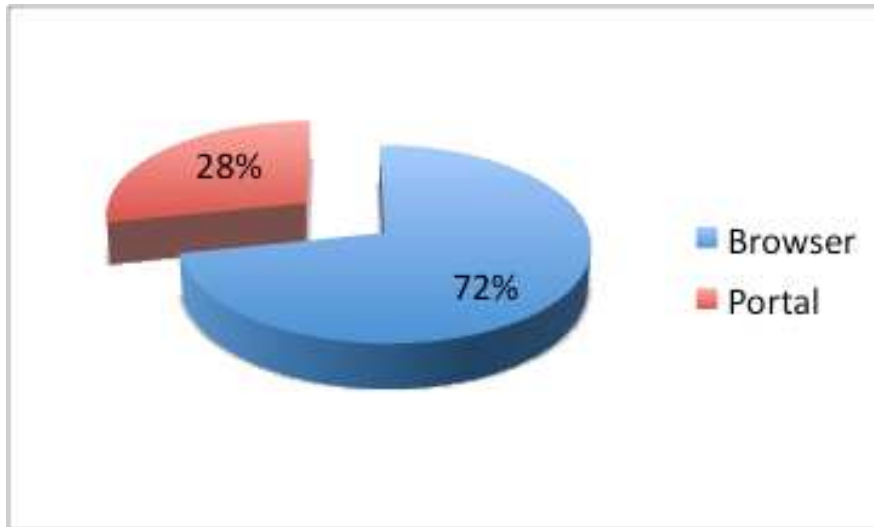


Tomcat is Used Most Often
Application server JBoss

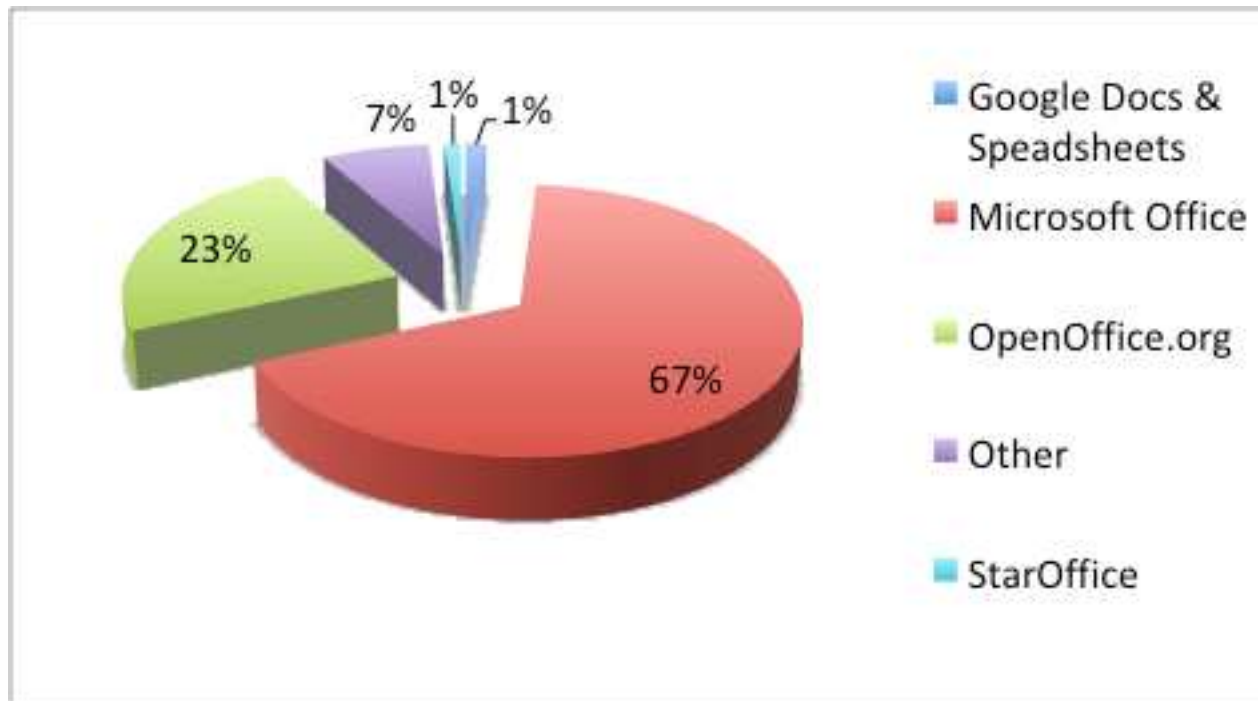
N.B. Other, None and Blank not used in this graph



Browser vs. Portal



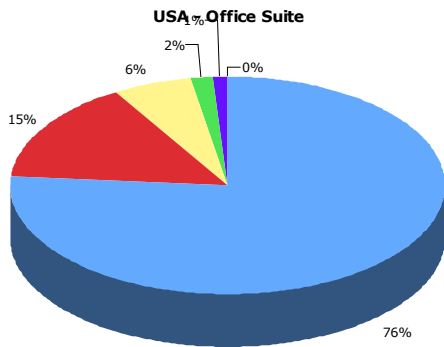
Browser is Used Most Often
Portal JBoss or Liferay



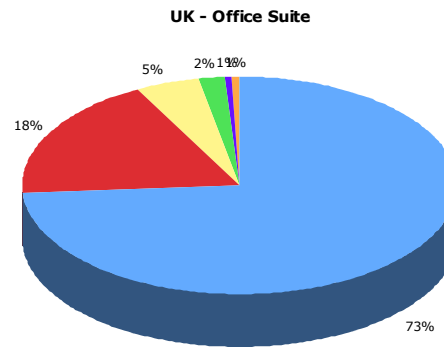
Open Source users want MS-Office



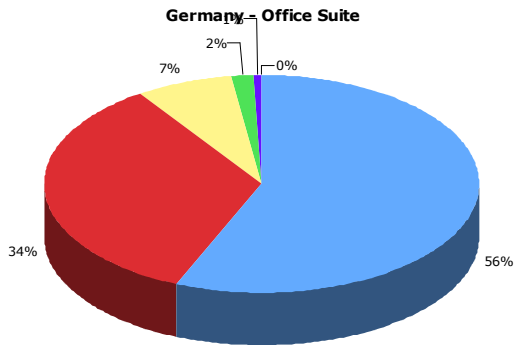
Office Suite



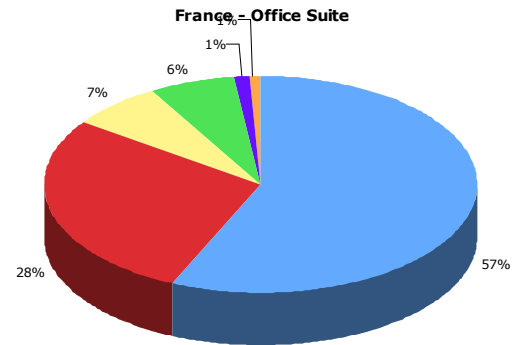
Microsoft Office OpenOffice.org Other Google Docs & Spreadsheets StarOffice (blank)



Microsoft Office OpenOffice.org Other Google Docs & Spreadsheets StarOffice (blank)

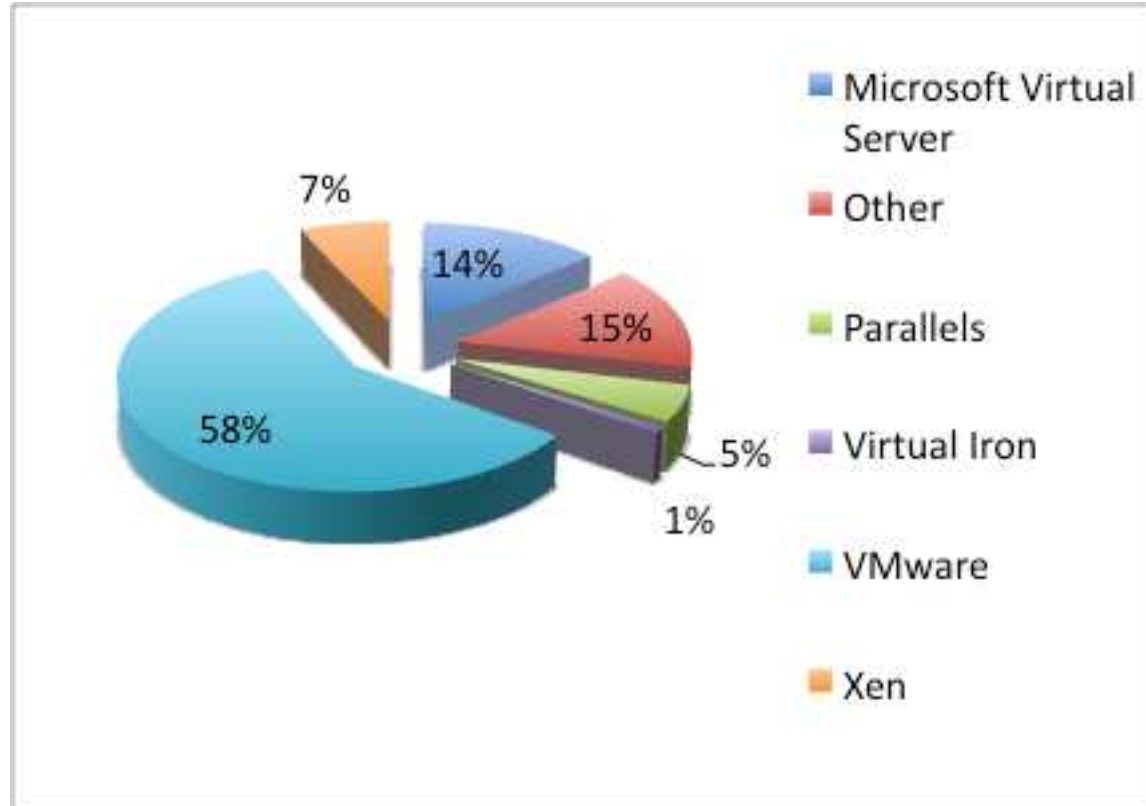


Microsoft Office OpenOffice.org Other StarOffice Google Docs & Spreadsheets (blank)



Microsoft Office OpenOffice.org Other (blank) Google Docs & Spreadsheets StarOffice

Open Office - Twice as probable in Germany and France



VMware dominant



Summary

OSB Statistics

- Open Source has a “Long Tail”
- USA is largest country represented overall
- Windows is very important for Open Source
 - To trial on a laptop
 - And deploy on Linux
 - If it is Microsoft it is XP or Windows 2003
- Partnering with Microsoft has an impact
 - See RHEL vs. Suse
 - But geography can turn the world-wide stats upside down
- RHEL is pulling away
- Sun is still shining on MySQL
- Tomcat or JBoss for the enterprise stack





Summary

Content Management Implications

- Access Content
 - Browser access
 - Portal market is confused
 - If you know what you want it is JBoss or Liferay Portal
- Generate Content
 - The world still wants Microsoft Office
 - But in Germany or France you are twice as likely to use Open Office
- And if you want to go Virtual
 - It is VMware





Summary *OSB Findings*

- Users want a mixed stack
- Users want to be able to change over time
- Users want to be able to change stack options between evaluation and deployment
- There is a clear leader at each level in the stack
- In Open Source you can't be half pregnant





The Risk to Choice The Benefit of Open Source

- Open Source Choice

- Office
- RIA Platform
- Portal
- J2EE or .NET
- Database
- Operating System
- Low Cost

- SharePoint Tie-In

- MS-Office
- Silverlight
- SharePoint Portal
- .NET
- SQL Server
- Windows
- Hidden Costs

***OSS Taking the
M out of MOSS***





How do I get more
Information?

www.opensourcebarometer.org

Alfresco Open Source Barometer



Global survey of trends
in the use of open source
software in the enterprise



How do I Join?

Alfresco Open Source Social Computing Platform
Alfresco Sets Agenda for Open Source Social Computing



[More Details](#)

Alfresco is the **Open Source Alternative for Enterprise Content Management (ECM)**, providing Document Management, Collaboration, Records Management, Knowledge Management, Web Content Management and Imaging. [More...](#)

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Which Operating System?



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<http://www.alfresco.com>



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Open Source Barometer

Alfresco Open Source Barometer



Global survey of trends in the use of open source software in the enterprise

Founded: 2007

Mini-Feed

Displaying 5 stories. See All

January 25

- Open Source Barometer wrote a note. 6:40pm

New Open Source Barometer shows Sun still Shines on MySQL
In July 2007 we launched the Open Source Barometer – a survey using opt-in data provided by 10,000 members of the Alfresco Community with the aim of providing a global survey of trends on the use of open source software in the enterprise.
Continue Reading...
- Open Source Barometer wrote on its own wall. 6:20pm
- Open Source Barometer added the Surveys, Petitions, Votes, Polls & Quizzes application. 6:02pm
- Open Source Barometer wrote a note. 5:42pm
Open Source Barometer – Community Counts
Alfresco launched the Alfresco Content Community earlier this year to offer easy access to documentation, answers to frequently asked questions, sample applications, white papers, recordings of webinars, training material and presentations from community meetings.
Continue Reading...
- Open Source Barometer created an event. 5:23pm

JBoss World Launch of Second Open Source Barometer
Second Open Source Barometer
When: 2:00PM Wednesday, February 13th
Where: Orlando World Center Marriott Resort

Information edit

Website: <http://www.opensourcebarometer.org>
Company Overview: The Open Source Barometer is the largest Open

Edit Page

- Edit Admins
- Send an Update to Fans
- Promote Page with an Ad
- You Are a Fan (undo)
- Edit Settings
- Share with Friends
- View Insights
- Surveys Votes & Petitions

Fans

6 of 7 fans See All

- Scott A Davis
- Michael Harlaut
- Marc Lefebvre
- Ian Howells
- Michael Uzquiano
- Nancy Garrity

Photos edit X

No one has added any photos.
Add Photos

Video edit X

There are no videos.
Add Videos

Events edit X

1 upcoming event. See All

JBoss World Launch of Second O...
Orlando World Center Marriott Resor...
Orlando, FL
Wednesday, February 13 at 2:00pm