Open Source: Are we ready yet?

Results of the Rapid Survey

1. Contents

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2. Foreword

Software Landscape Set to Change …
Over Two Thirds of Senior IT Professionals Expect Businesses To Develop Open Source Strategies

In June 2005, the National Computing Centre (NCC) conducted a survey across UK businesses on behalf of Atos Consulting, the consulting arm of Atos Origin, to determine how fast companies are adopting an Open Source strategy. Despite on-going caution, the survey showed that adoption is set to increase significantly over the next few years and identified the key benefits as being reduced licensing costs, followed by flexibility and total cost of ownership.

In a climate where business value from IT investment is the driver, the survey confirmed that Open Source is already proving its viability with more IT professionals building Open Source into their IT strategies:

- Over 50% have either adopted or are planning to adopt Open Source
- Over 55% either accept or include Open Source in a tender
- Over 30% believe advice on technical strategy is the service that would assist them most with their adoption of Open Source
- Over 60% believe that Open Source will either increase its presence in certain business areas or be a fundamental component in core IT systems
- Over 73% expect Open Source to develop within their organisations' IT strategy over the next five years
- Lack of long-term support was cited as the major inhibitor to adoption.

With a strong pool of experienced Open Source professionals and the business models that address the support issue now maturing, companies that prepare thoroughly and define an Open Source adoption roadmap from the outset can realise tangible cost benefits in a very short time.

Noomane Fehri
Atos Consulting

Principia

3. Background

In May 2005 Atos Consulting commissioned the National Computing Centre (NCC) to deliver a survey on “Open Source: Are we Ready?”. The aim of the survey was to investigate the UK market and readiness for Open Source.

The Appendix-Tables displays the figures on which the charts and written commentary are based on in this report.

Survey Methodology

The survey took the form of an NCC Rapid Survey which is a short web-based questionnaire available to NCC contacts for a limited timeframe. The survey questionnaire was developed in consultation with Atos Consulting and consisted of 12 questions all in optional answer format.

Participation was primarily by invitation. NCC members and contacts were e-mailed an invitation to participate in the research. A further reminder e-mailing was dispatched to members 2 weeks later. However, others could access and respond.

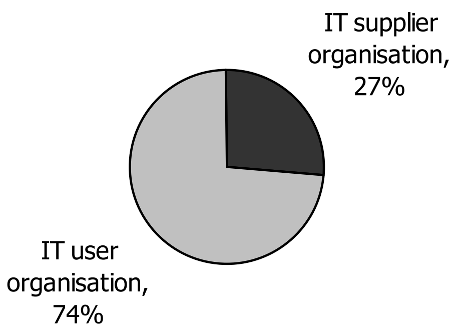
The survey was open for responses from 9th May 2005 to 10 June 2005.

The Respondents

This report is based on 143 responses received by the closing date.

We did not collect personal information for this survey but requested information on whether they represented an IT user or IT supplier organisation. Almost three-quarters of the responses were from IT user organisations and just over a quarter were from organisations that supply IT products and/or services.

Figure 3.1 Respondents by type of organisation



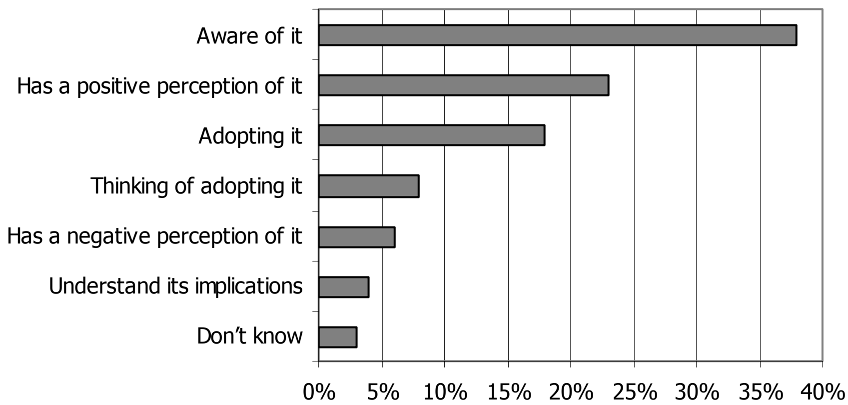
4. Organisations' current and future Open Source strategy

Respondents were asked to indicate their organisation's current stance in relation to Open Source. The intention of this question was for respondents to indicate as many statements that applied to their organisation. In some cases this ability to "track" was evident in responses, however, a number of respondents simply indicated the one statement that applied the most to their organisation.

This could also have had some influence on the results, for example, only 38% said their organisation was aware of Open Source. It is reasonable to expect this figure to be much higher, especially as the respondents are all senior decision makers in IT and NCC contacts, given that NCC has been covering the subject of Open Source in it various outputs (publications, surveys and events) over the last four years.

23% of organisations have a positive perception of Open Source, 18% are adopting it and 8% are thinking of adopting it. While, 6% think Open Source has a negative perception within their organisation.

Figure 4.1 Organisations current position on Open Source

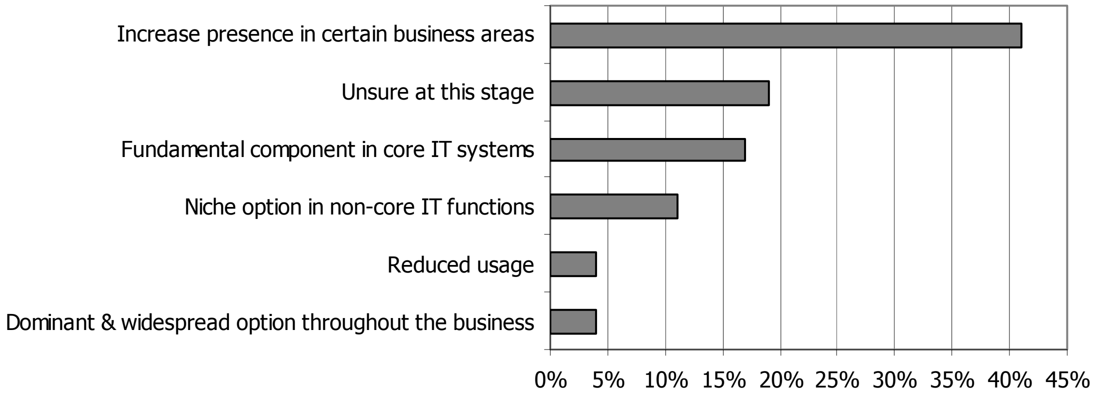


Almost three-quarters (73%)of respondents expect Open Source to develop within their organisations' IT strategy over the next five years. Of these, 4% of them expecting Open Source to dominate and be a widespread option throughout the business. The remaining 69% expect the influence and use of Open Source to be limited to core areas with the majority of them (41%) expecting Open Source to have an increase presence in certain business areas, 17% expect it to be a fundamental component in core IT systems and the remaining 11% expect it to be a niche option in none-core IT functions.

The remaining 27% were less certain of the development of Open Source within their organisation, with 19% declaring they were unsure at this stage of the influence of Open Source on their IT strategy, 4% indicated their would be decreased usage. 4% provided other reasons which included:

- "Increased Microsoft reliance"
- "Used for appliance applications where appropriate"
- "No plans"

Figure 4.2 Organisations Open Source strategy over the next 5 years



5. Benefits and inhibitors

All of the identified benefits of Open Source scored similar figures, but it was the cost of a license which was perceived to be the greatest benefit with 27%. Total Cost of Ownership (TCO) and flexibility were the next greatest benefit of Open Source both scoring 23%. While 20% think access to source code is a benefit.

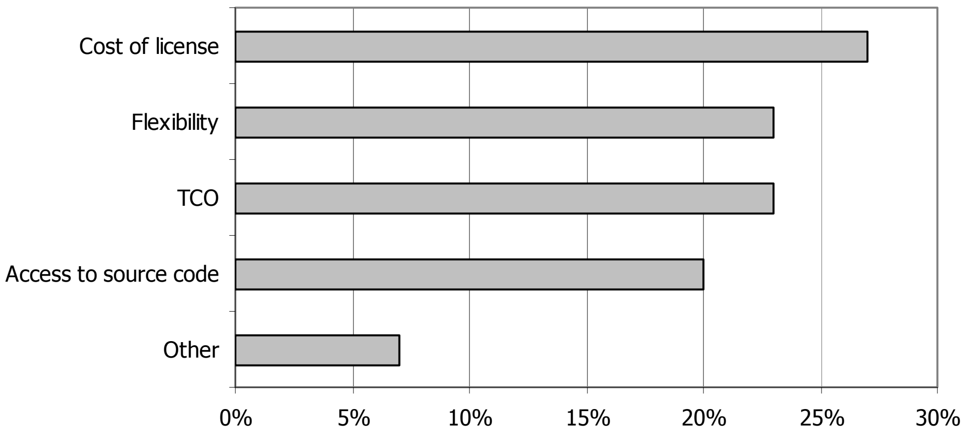
7% also indicated other benefits including:

- "Reduction of risk involved in dependency on a small number of suppliers"
- "Community developed = higher security more ethical base"
- "Reliability/performance"
- "Compact, performance, broad software base"
- "Scaling in specialist areas"
- "Tends to be built on open platforms"
- "Not locked to defunct vendor"
- "Operational stability & robustness"
- "Greater levels of expertise in the workforce"

- "Excellent reliability in some cases"
- "Ability to transfer support contract to other vendors - reduces lock in"
- "Much more reliable than Microsoft"
- "Gives control over upgrades back to the client"
- "Interoperability across systems"
- "Stability"
- "Avoid lock-in to monopoly supplier"
- "No vendor lock-in"
- "Promotion of Open Standards"
- "Less dependance on Microsoft"
- "Security (fewer viruses etc)"
- "Isn't owned by you know who!"

While one respondent said they had "not done a comparison yet", and another said, "not sure there is a benefit yet."

Figure 5.1 Perceived benefits of Open Source

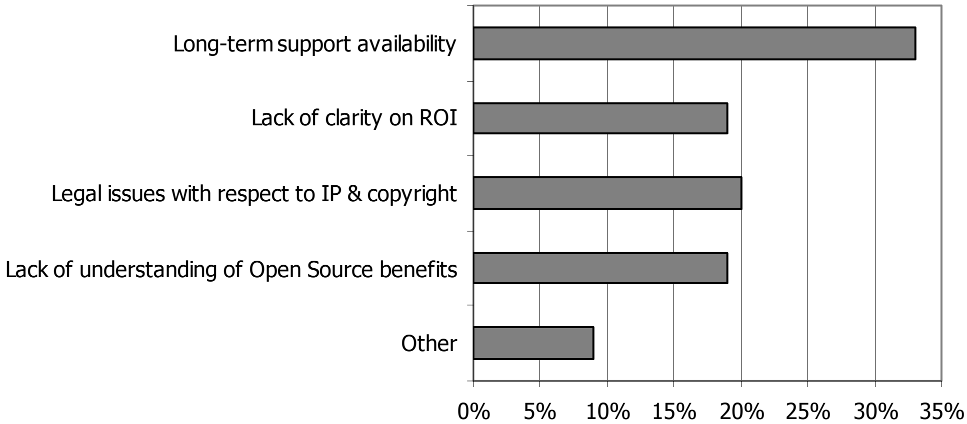


As for inhibitors, the lack of long-term support was perceived to be the greatest inhibitor to the adoption of Open Source (with 33%). While legal issues with IP and copyright was seen as an inhibitor by 21%, and lack of understanding of the benefits and lack of clarity on ROI both got 19%.

9% of respondents also described other disadvantages, including:

- “Proven track record in real world apps”
- “Transition costs”
- “Developing skills, level of skills”
- “Security of open source systems”
- “Training, Skills, Existing Investment”
- “Compatibility with existing systems/data”
- “TCO”
- “Lack of mainstream applications”
- “Reluctance to change, inertia”
- “Spoiling activities by established vendors”
- “Microsoft are very good at marketing”
- “FUD (Fear, Uncertainty and Doubt)”
- “Large number of applications to migrate from MS Windows”
- “Strategic IT decisions regarding technical infrastructure often made at very high management level without adequate understanding of true IT impact”
- “Risks involved in changing strategy”
- “Version control, software not as sophisticated as some closed-source systems, extra training needed for non-standard systems, ability of systems administrators to tweak the source code”
- “Lack of training courses”
- “Compatibility with legacy applications”.

Figure 5.2 Perceived inhibitors to Open Source



6 Awareness and perceptions

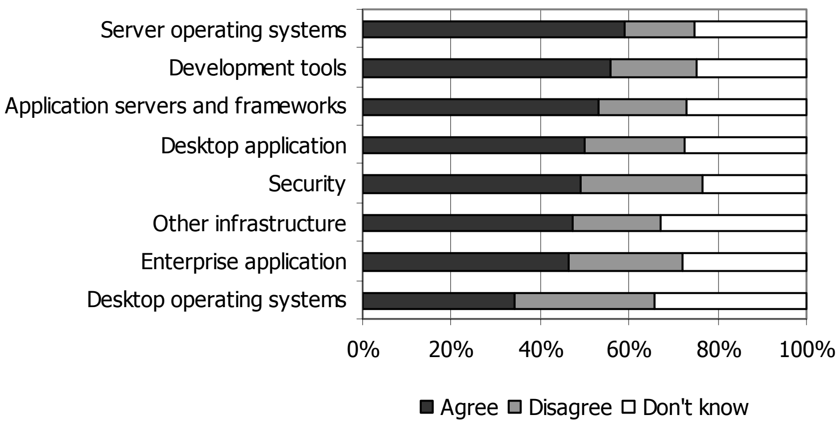
Nearly all of the respondents were aware of how Open Source could be deployed in specific areas of IT. They were also more likely to agree than disagree that each would be a benefit.

Over half of respondents thought server operating systems (56%) and development tools (52%) would benefit the most from Open Source.

There was some uncertainty about desktop operating systems though with 31% agreeing there would be a benefit, 29% disagreeing and 31% not sure.

Security also scored highly in terms of respondents disagreeing with the benefits of introducing Open Source with just over one-quarter against it, but 46% thought their would be benefits.

Figure 6.1 Areas of IT that would benefit most from Open Source

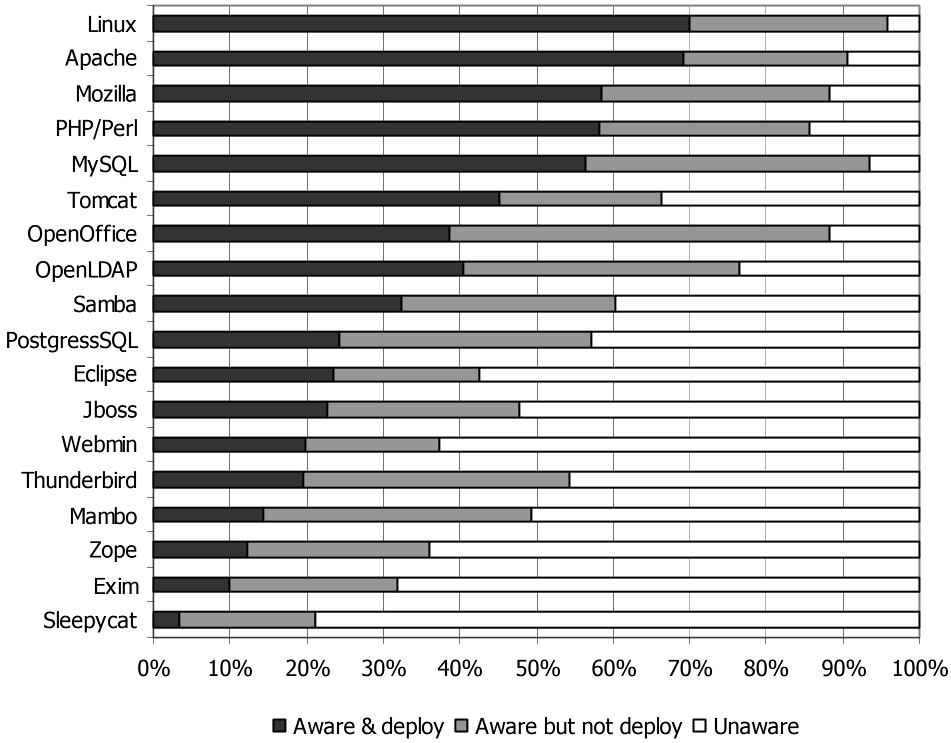


Linux (68%), Apache (67%), Mozilla (55%), PHP/Perl (53%) and MySQL (52%) all scored highly as Open Source products respondents were aware of and would consider deploying within their organisation.

There were a number of products that respondents were aware of which in the majority of cases they would not deploy including: OpenOffice, PostgressSQL, Jboss, Thunderbird, Mambo, Zope, Exim and Sleepycat.

Whilst Sleepycat, Exim, Zope, Webmin, and Eclipse were the least known products.

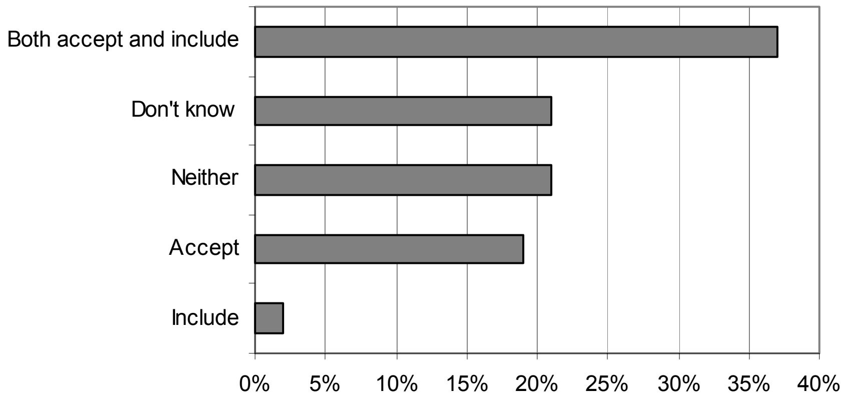
Figure 6.2 Awareness of Open Source products and whether they would deploy



During a tendering exercise the largest group (37%) of organisations would both accept and include Open Source within a supplier response. 19% said they would accept (but not include) and just 2% would include but not accept.

21% said they would neither accept nor include and another 21% said they didn't know.

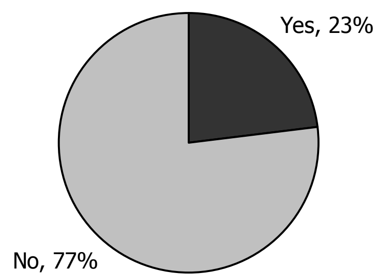
Figure 6.3 Organisations acceptance or inclusion of Open Source in a tender



7 Open Source licensing

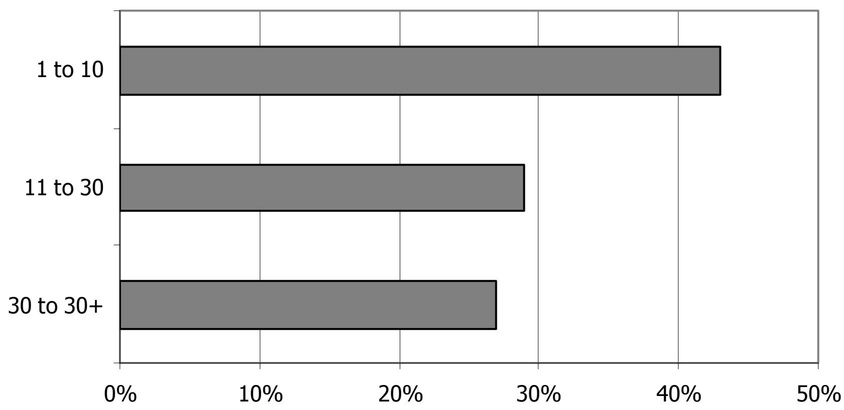
Over three-quarters of respondents do not know the difference between Open Source GPL (General Public License), LGPL (Lesser General Public License) and CCDL (Common Development and Distribution License).

Figure 7.1 Do respondents know the difference between GPL, LGPL an CCDL



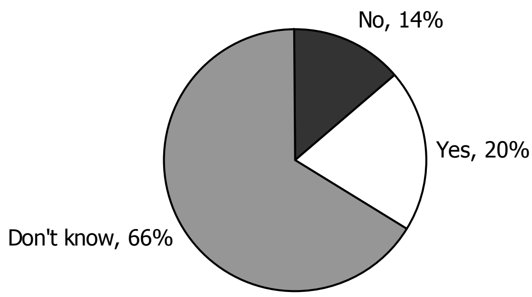
There is a certain amount of confusion about the actual number of Open Source license models. General opinion, within Open Source 'circles', is that it exceeds 35. For our respondents it appears to be unclear the true scale of license models with the majority (43%) thinking there are between 1 to 10 license models. 29% think there are between 11 to 30 license models, while just 27% think there are 30 to 30+ currently available. This is evidence that there is some work to be done in making people more aware.

Figure 7.2 The number of Open Source license models respondents think are currently in use in the UK



Again there is some work to be done in terms of awareness on legislation with 66% of respondents indicating they really don't know if there is any difference between Open Source legislation in the UK and elsewhere. A further 20% believe there is a difference between the UK and the rest of the world, while 14% think there is no difference in legislation.

Figure 7.3 Open Source legislation - Respondents view on if there are differences between UK and the rest of the world



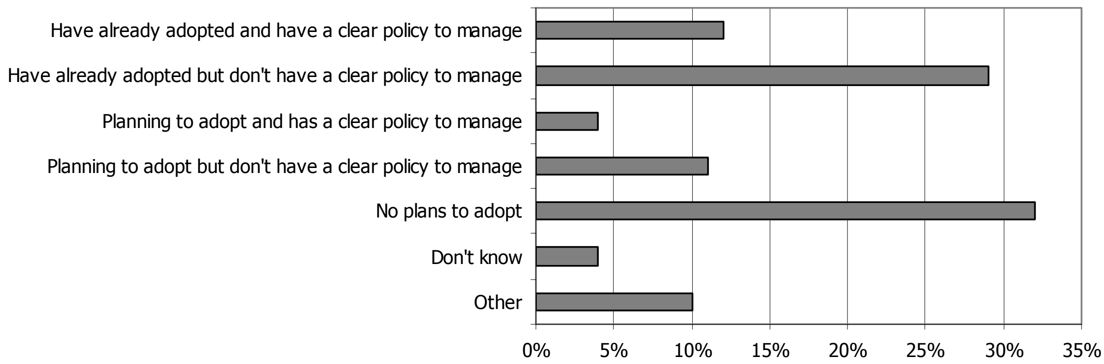
8 The organisation

41% of organisations have already adopted Open Source, but only 12% of these have a clear policy to manage the process. While 15% are planning to adopt Open Source but again only a few (4%) have a clear policy to manage Open Source in the organisation. Thus whether they have already adopted or plan to adopt the majority do not have a policy but what is not clear is whether or not this is because they don't feel it is necessary to have a policy.

10% of respondents indicated other plans or reasons including:

- "Our organisation has adopted open source in the past but this is likely to reduce as it is suffering from a poor perception from the organisation's senior management"
- "Currently under consideration"
- "Software purchased on basis of what is most appropriate to business need not availability of source code."
- "I am not in a position to influence my organisations implementation of OSS. I personally have a positive attitude to OSS, while the organisation has shown a negative attitude to all suggestions of implementing OSS."
- "We are adopting open source but delivery and accountability is with our suppliers"
- "Organisation hasn't decided"

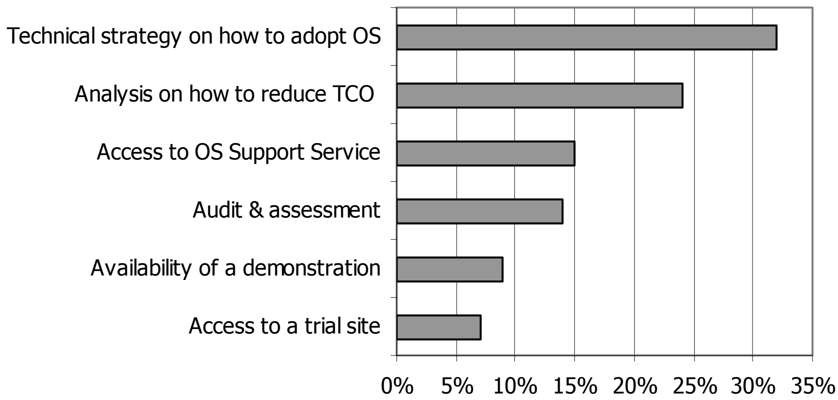
Figure 8.1 Organisations current stance in the adoption of Open Source



So what kind of service available to organisations would assist them in moving forward with Open Source? One-third of respondents thought access to, and availability of, a technical strategy on how to adopt Open Source which defines a target as well as the roadmap to achieve this would be of great help in progressing adoption. 24% would like an analysis on how to reduce Total Cost of Ownership (TCO) on software and hardware by using Open Source. 15% wanted access to an Open Source support service and 14% were keen on an audit and assessment of their license liabilities associated with Open Source usage.

Access to a trial site (7%) and the availability of a demonstration (9%) were the least popular amongst respondents.

Figure 8.2 Type of products/service that would assist organisations in the adoption of Open Source



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