



The Open Source Barometer Edition III

Enterprise Content Management (ECM) is driven by and dependent on a model of high cost, high complexity and customer control through proprietary power. Today's economic climate is about low cost simplicity, with rapid business value and customer choice lowering TCO by reusing existing hardware, software and skills. This white paper reveals how to achieve a modern 21st century ECM implementation at a tenth of the cost.

The Open Source Barometer III

Executive Summary

Open source is one of the major trends of this decade. Much analysis is based on very small sample sizes. Enterprise Content Management (ECM) provides an interesting view of the role of open source in an enterprise as it sits on top of the stack integrating with both the infrastructure and end user tools.

The third edition of the Open Source Barometer was designed to investigate the impact of Enterprise 2.0 technologies and SharePoint on the stack. The highlights of the survey have been grouped into the following three categories:

The Impact of SharePoint and Microsoft Stack Adoption on Open Source

- Open source users as a whole and respondents using Windows are rejecting Silverlight and .NET/Web parts
- 92% do not use or intend to use Silverlight
- 86% do not use or intend to use .NET/Web Parts
- 71% use or intend to use an open stack based on a Java architecture
- 58% use or intend to use AJAX with 21% choosing Flex
- 53% of respondents using Windows use or intend to use a stack based on a Java architecture
- 52% of respondents using Windows use or intend to use AJAX

The Impact of Enterprise 2.0 on Open Source

- 66% want to access content via a browser
- In the context of open source, ECM users value integration, preferring to use the integrated blog (63%), wiki (60%), BPM (62%) and BI (59%) tools
- If there is a preference for blog, wiki or BPM then the relevant open source leader is the choice – WordPress (16%), Mediawiki (15%) and JBoss jBPM (12%)
- Open source users want a mixed stack
- Open source has a “Long Tail” in terms of geographic adoption extending to over 180 countries

The Impact of Enterprise 2.0 on Open Source Infrastructure

- Red Hat and Ubuntu continue to lead
- Windows respondents continue to reject Vista (with only 9% using it) preferring XP (58%) and Windows Server 2003 (29%)
- Tomcat continues to dominate (67%), with JBoss being the leading application server (15%)

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Introduction

Open source is one of the major trends of this decade. Much analysis is based on very small sample sizes. ECM gives an interesting view of the role of open source in an enterprise stack as it sits on top of the stack integrating with both the infrastructure and end user tools.

The initial goals of the Open Source Barometer were to ask questions such as:

- How and where is open source used in the global 5000 enterprise stack?
- Is it used in a pure LAMP/open source stack or a hybrid stack?
- Is there a leading player at each level in the stack?
- Does usage differ from evaluation to deployment?
- Does usage differ by geography?
- What are the trends over time?

The third edition of the Open Source Barometer was designed to investigate the impact of Enterprise 2.0 technologies and SharePoint on the stack. Specifically, the following categories were used to drive the survey questions:

- Content Management
- Collaboration
- Portal
- Business Process
- Business Intelligence
- Search

The new questions in the third edition of the survey were “for each of the following technologies please indicate which platform or application you are using or intend to use Alfresco on”:

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

As well as the previous survey questions related to use of:

- Operating System
- Application Server

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Methodology

Alfresco provides valuable content on the Web free to the Alfresco community, including documentation, frequently asked questions and answers, sample applications, a developer toolbox, recorded webinars, training and white papers. When users join the community they are asked to complete a questionnaire on their preferred software stack. This information helps Alfresco to prioritize platform and stack combinations for the benefit of the larger community.

This survey was conducted from April 1st to September 30th 2008 using data provided by the 25,163 new members of the Alfresco community who joined in that period (the current membership is in excess of 74,000).

Alfresco is predominantly deployed in large global 5000 organizations – financial services, media, professional services - and in government. This enables Alfresco to offer a unique insight into mixed stack usage in modern evaluation and production environments within large organizations. The sample survey size is statistically valid, with more than 25,000 community members contributing information.

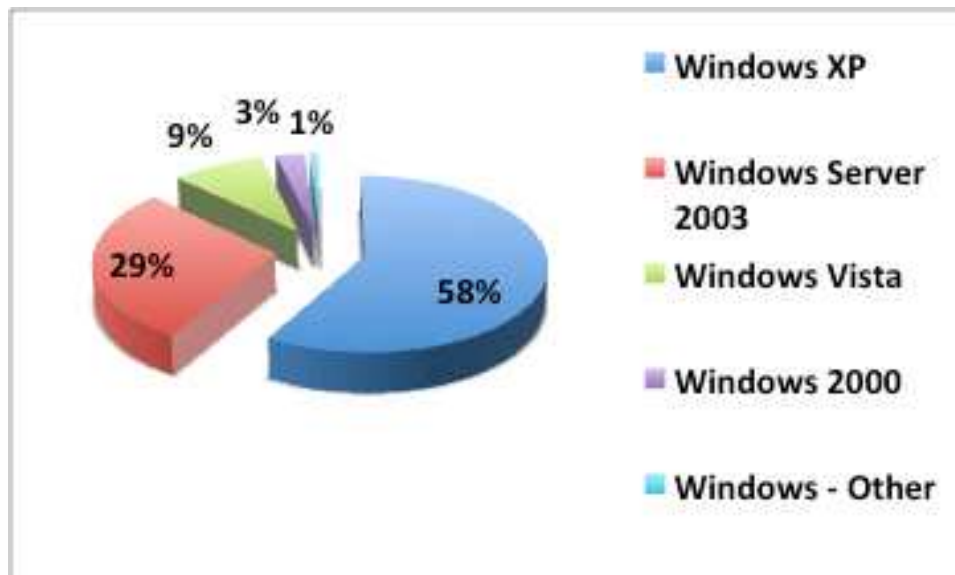
The survey is available on: <http://www.alfresco.com/community/register/>

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The Impact of SharePoint and Microsoft Stack Adoption on Open Source

It is important to note that SharePoint only runs on a Microsoft stack and some have speculated that SharePoint is the next operating system from Microsoft. One of the goals of the survey was to examine the influence of SharePoint and the Microsoft stack on the open source community.

Previous surveys have shown that community members tend to evaluate on a Windows laptop and in deployment turn to a Linux server. This survey continued the trend with 64% of users preferring to evaluate on Windows.



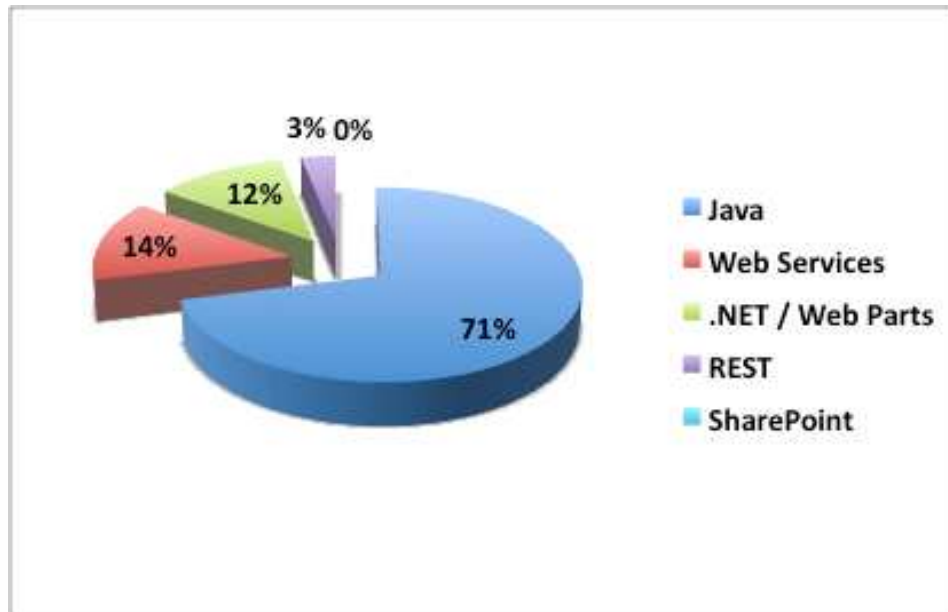
Commentary:

“The open source community tends to evaluate on Windows. Of interest is that 91% do not intend to use Vista but instead are staying with XP or Windows Server 2003.”

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Architecture

The architecture analysis shows a strong preference for Java at 71%.



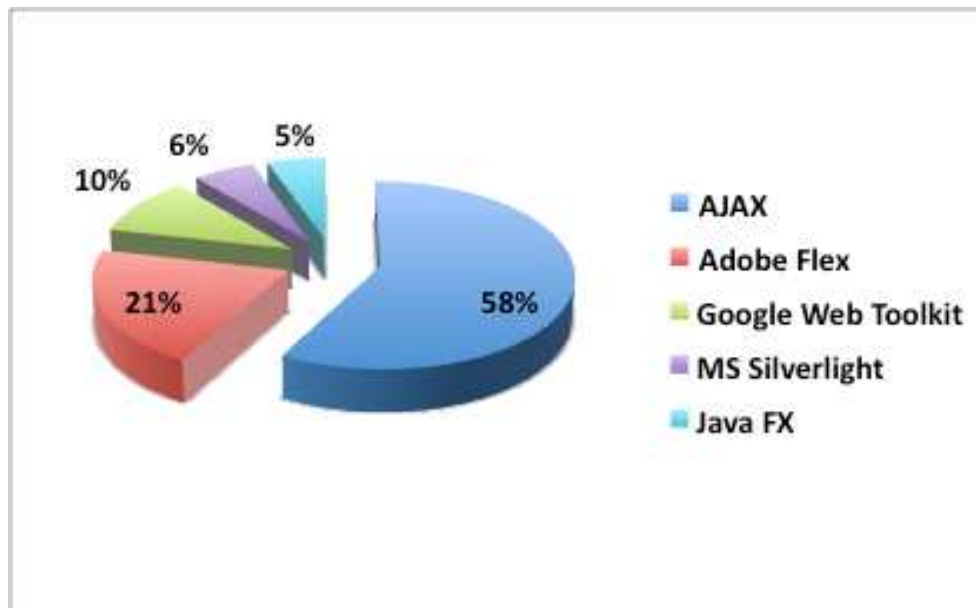
Commentary:

“Java has for a long time been strong in the open source community. However, the analysis further segmented the Windows-only users and found that 86% do not use or intend to use .NET/Web Parts and 53% want a Java architecture. A logical conclusion to this is open source users want an open stack, even on Windows.”

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Rich Internet Application

The Rich Internet Application (RIA) analysis shows a strong preference for AJAX at 58%.



Commentary:

“AJAX frameworks have for a long time been strong in the open source community. However, the analysis segmented the Windows-only users and found 92% do not use or intend to use Silverlight, 52% want AJAX and 24% Flex.

Windows operating system respondents are turning away from .NET/Web Parts and Silverlight, instead looking for an open stack based on Java with either an AJAX or Flex based client.”

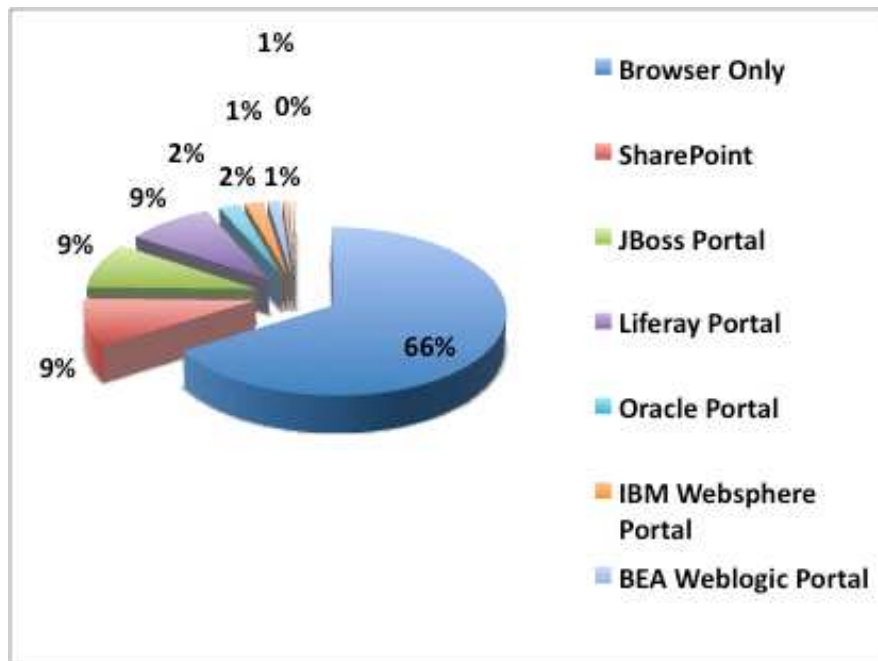
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Enterprise 2.0

Web 2.0 has had a major impact on how users create and access content, particularly from an ease-of-use perspective. One of the goals of the survey was to examine the influence of Enterprise 2.0 technology such as wikis and blogs on ECM. The results of these survey questions are outlined in the following pages.

Browser or Portal Access

The browser or portal analysis shows a strong preference for Browser access at 66%.



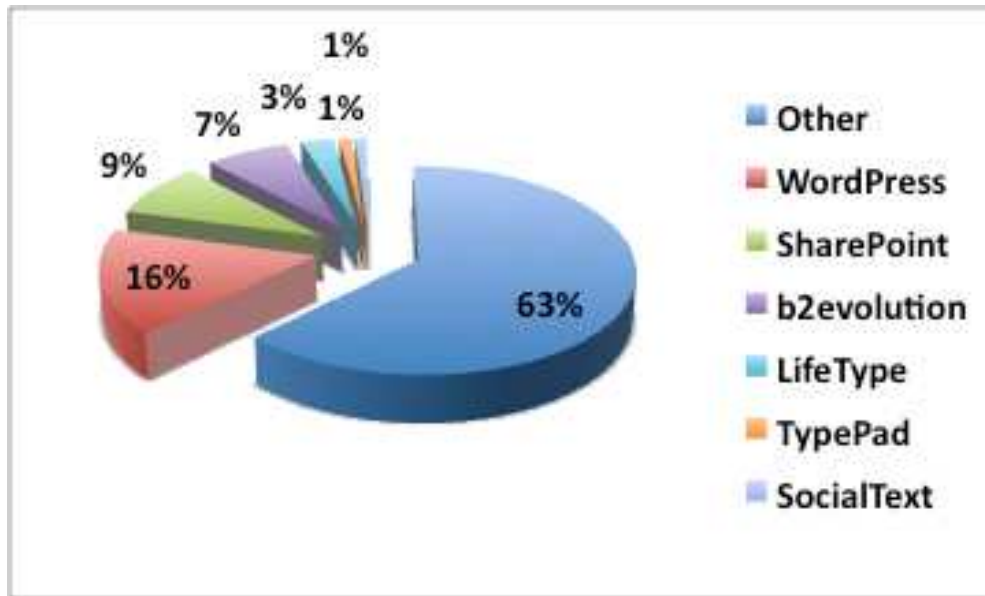
Commentary:

“Open Source ECM users want to recreate the external web experience with either simple browser access or browser access via an AJAX user interface.”

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Blog

The blog analysis shows a strong preference for “Other” at 63%.



Commentary:

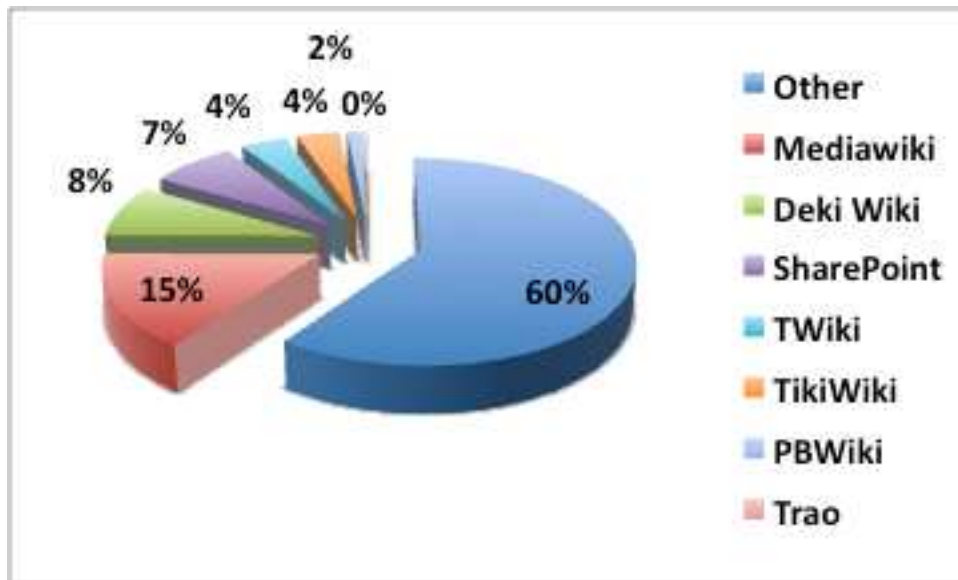
“From this data it is possible to draw one of two conclusions. Either “Other” represents a hosted blog being used on the web. The more probable conclusion is that an ECM user, working in an ECM environment, will use the integrated blog software. This is more likely and reflected in SharePoint blog usage in a SharePoint environment.

In summary, for the majority of the time the user will prefer the integrated blog software, but if they have a preference they will choose the leading open source Web 2.0 blog software – WordPress.”

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Wiki

The wiki analysis shows a strong preference for “other” at 60%.



Commentary:

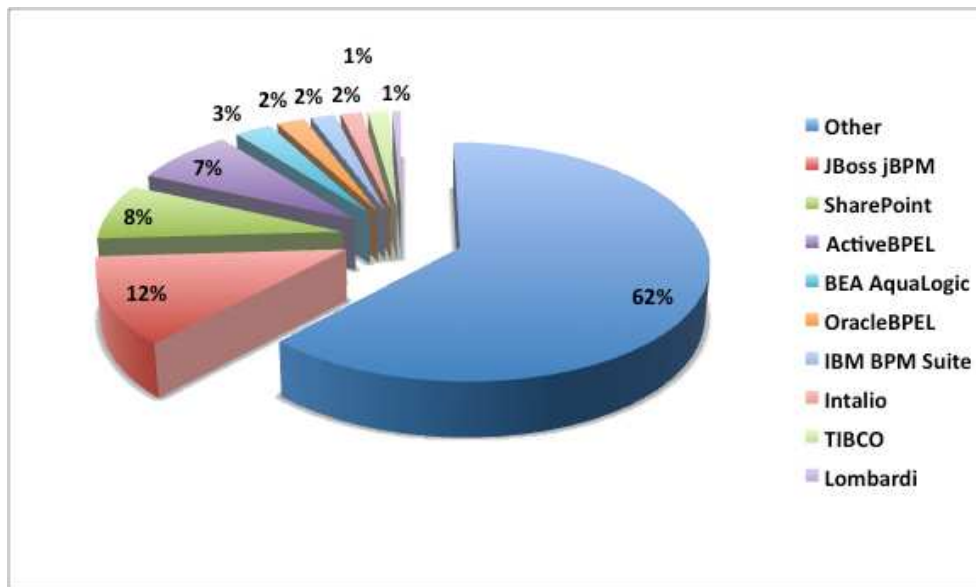
“Again the probable conclusion is that an ECM user, working in an ECM environment, will use the integrated wiki software. This is also reflected in SharePoint wiki usage in a SharePoint environment.

In summary, for the majority of the time the user will prefer the integrated wiki software but if they have a preference they will choose the leading open source Web 2.0 Wiki software – MediaWiki, which powers Wikipedia.”

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Business Process Management

The BPM analysis shows a strong preference for “other” at 62%.



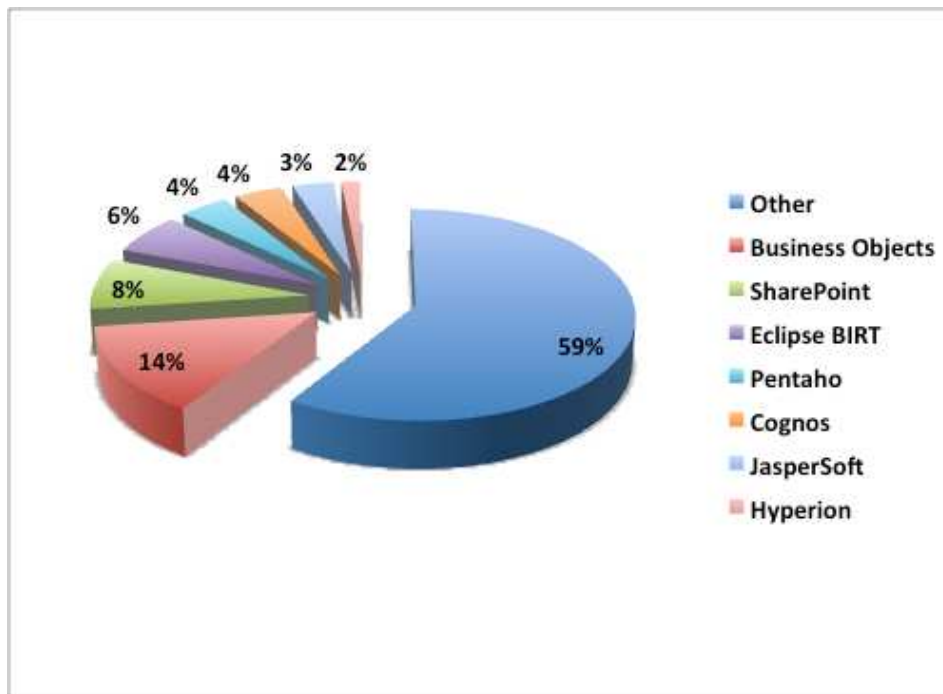
Commentary:

“Once again the probable conclusion is that an ECM user, working in an ECM environment, will use the integrated BPM or workflow software. This is also reflected in SharePoint BPM usage in a SharePoint environment.”

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Business Intelligence

The Business Intelligence analysis shows a strong preference for “other” at 59%.



Commentary:

“And again the probable conclusion is that an ECM user, working in an ECM environment, will use the integrated workflow/BPM analysis software to analyze process performance and exceptions. This is also reflected in SharePoint Excel services usage in a SharePoint environment.

In summary, for the majority of the time the user will prefer the integrated BPM or BI software but if they have a preference they will choose the leading open source BPM software – JBoss or proprietary BI software - Business Objects.”

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Open Source Infrastructure

Previous editions of the Open Source Barometer have focused more heavily on the supporting infrastructure. The key findings of the previous edition (February 2008) were as follows:

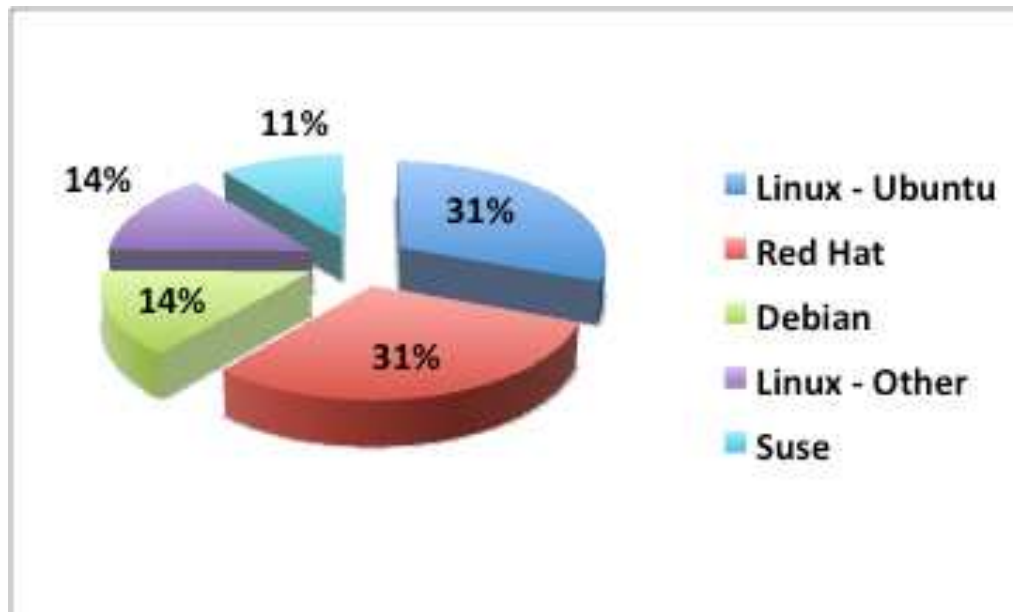
- **Operating system:** “Users evaluate on a Windows laptop and deploy on Linux” – 41% of evaluations were on Windows, dropping to 26% for deployments, whereas 51% of deployments were on Linux
- **Linux:** “Ubuntu and Red Hat pull away, SUSE remains flat by comparison in the US” – Ubuntu 24%, Red Hat Enterprise Linux 21%
- **Windows:** “Users stick with XP and 2003, Vista lags at 2%” – XP 63%, Windows 2003 28%
- **Databases:** “Sun still shines on MySQL” – MySQL 60%, Oracle 14%, MS SQL Server 13%
- **Application servers:** “Tomcat dominates with largest market share in study” - Tomcat 70%, JBoss Application Server 18%
- **Office suite:** “When it comes to content it comes from Microsoft Office. However, users in Germany and France are twice as likely to use OpenOffice than in the US or UK” – Microsoft Office 66%, OpenOffice 24%
- **Browsers and portals:** “For content and mashups browsers preferred” – Browsers 59%, Portal 41%
- **Virtualization:** “If it is virtual it is VMware” – VMware 61%, Microsoft Virtual Server 16%.
- **Clear leader:** “Open Source creates a clear leader at each level in the stack.” – Red Hat Enterprise Linux (RHEL), MySQL, JBoss, Tomcat
- **Mixed stack:** “Users don’t want to be tied and require flexibility to change over time.”

The current survey found much in common with previous infrastructure findings, establishing these trends over time.

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Linux Leaders

The Linux analysis shows Red Hat and Ubuntu leading, each at 31%.



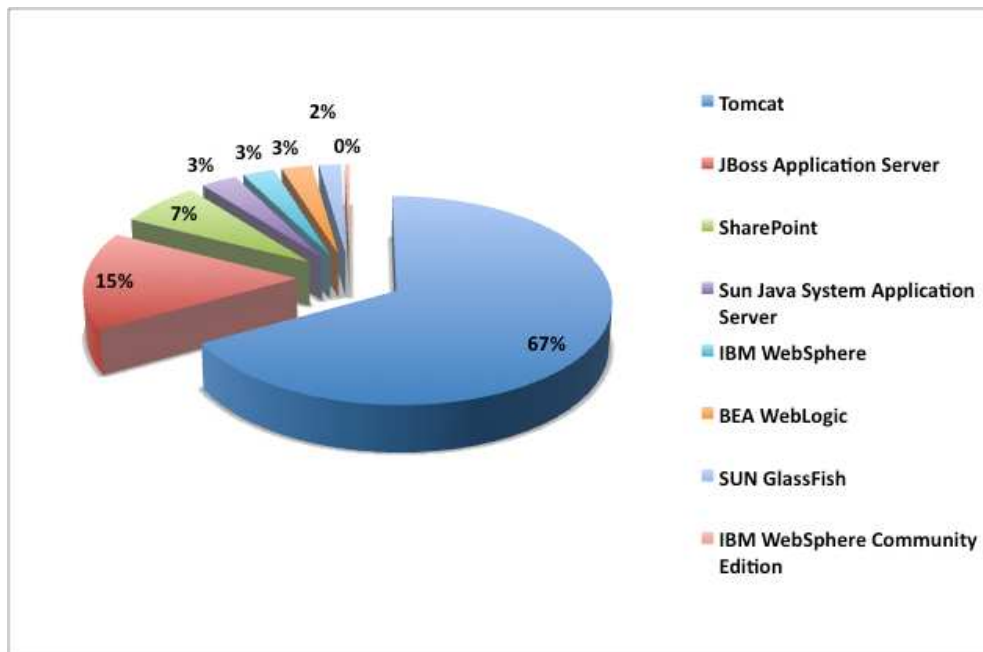
Commentary:

“As with the previous survey findings, the clear leaders are Red Hat and Ubuntu.”

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Application Server

The application server analysis shows a strong preference for Tomcat at 67%.



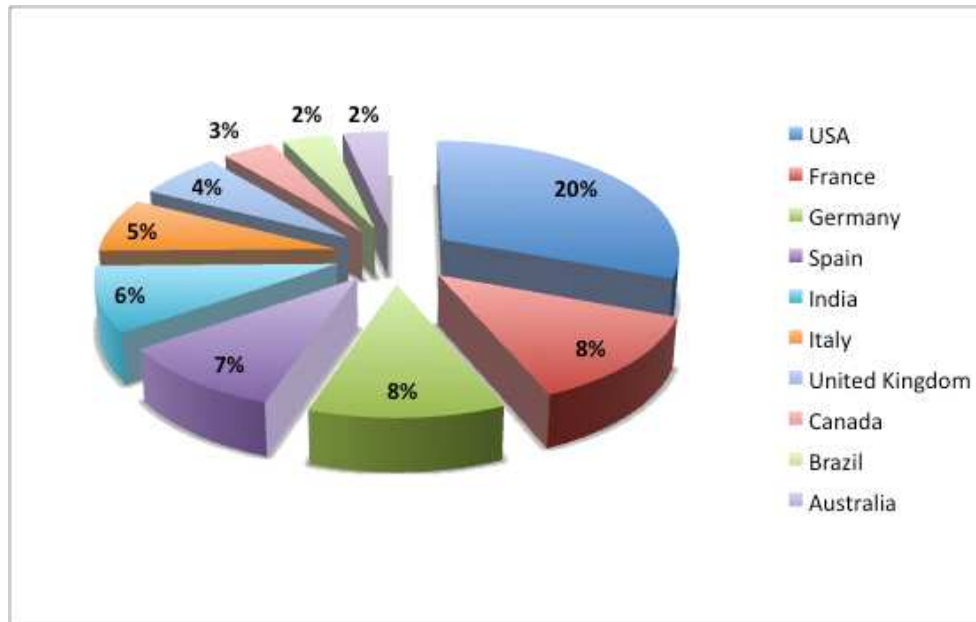
Commentary:

“As before Tomcat is the clear leader. If a fully featured application server is required, JBoss is the leader.”

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Geographic Analysis

The geographic distribution of community members is as follows:



Commentary:

“The survey found that the US is the largest adopter of open source globally. However, it is interesting to note that open source has a “long tail” effect with, in this case, over 180 countries being members of the community and the European tail being 2.5 times the size of the US. We believe that in Europe, government is driving adoption, with leading exponents being France and Germany. India is also significantly increasing its use of open source.”

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Conclusion

The Open Source Barometer provides the largest survey of usage of open source in a modern enterprise stack. The third edition of the survey took place during an interesting period, witnessing the continued growth of SharePoint and Web 2.0 social software.

The survey found that respondents evaluating Alfresco's open source ECM software are using Windows, but rejecting .NET/Web parts and Silverlight, instead looking for an ECM solution based on a Java architecture and AJAX, with integrated Web 2.0 tools.

The results demonstrated how organizations are increasingly using a mixed open source and proprietary environment to address their IT infrastructure requirements.

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For more information on Alfresco, including downloads, webinars and events, please visit www.alfresco.com

For more information on the Open Source Barometer, please visit www.opensourcebarometer.org



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