

# OPEN SOURCE BAROMETER

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# OPEN SOURCE BAROMETER

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## EXECUTIVE SUMMARY

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The Alfresco Open Source Barometer is a survey using opt-in data provided by 10,000 of the 15,000 Alfresco community members with the aim of providing a global survey of trends in the use of open source software in the enterprise.

Users were asked about their preferences in operating systems, application servers, databases, browsers, and portals to capture the latest information in how companies today evaluate and deploy open source and legacy proprietary software stacks in the enterprise. The Alfresco ECM suite sits on top of this stack and offers a unique insight into mixed stack usage in modern global 2000 organizations and government.

Alfresco's survey studied how enterprises evaluate, test and deploy both open source and proprietary software around Alfresco's enterprise content management system.

Users surveyed provided unprecedented levels of detailed information on their software infrastructure, a reflection of the vibrancy of the Alfresco community. This information helps Alfresco to prioritize platform and stack combinations for the benefit of the larger community.

Among the highlights revealed by the Open Source Barometer were:

- **Operating systems:** Surprisingly, users evaluated Alfresco as much on Windows as they did on different flavors of Linux, but they strongly preferred to deploy production systems on Linux. Windows plays an increasingly important role in testing and evaluation because it is the operating system on most desktops.
- **Application servers:** Users strongly preferred open source Tomcat or JBoss over the leading proprietary offerings from Sun, IBM and BEA, even in production environments.
- **Databases:** Overwhelmingly, users test and deploy on MySQL with PostgreSQL a surprisingly close second for both evaluations and production deployment. Oracle was the most popular proprietary choice among the proprietary databases.
- **Browsers and portals:** To access the Alfresco ECM repository, users preferred browsers over portals. And Firefox was the most popular choice among different browsers. When users selected a portal preference, 80 percent chose Liferay or JBoss Portal.

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## METHODOLOGY

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The survey, conducted April through June 2007 uses opt-in data provided by 10,000 Alfresco community members during the Alfresco Content Community registration process (see link below).

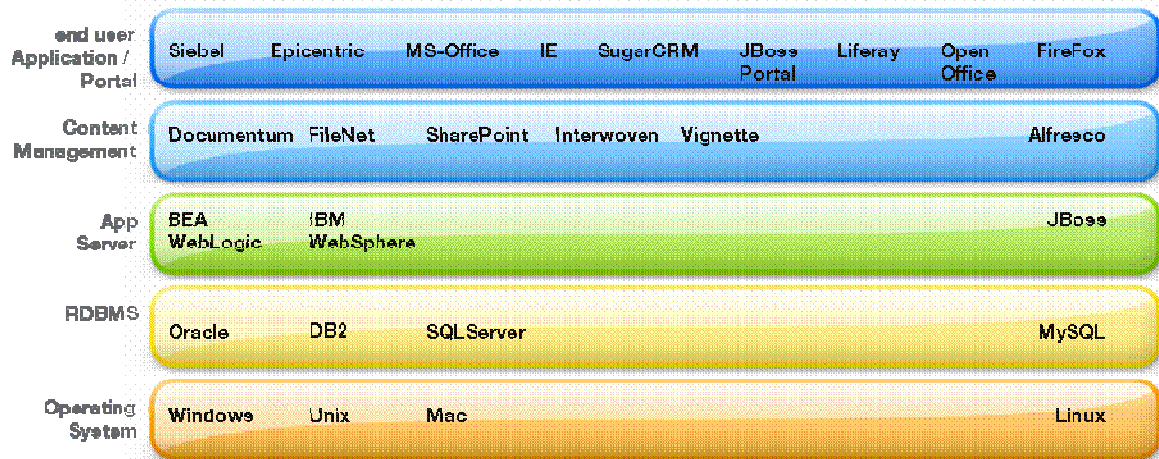
<http://www.alfresco.com/community/register/?source=community>.

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## INTRODUCTION

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Open source adoption is growing rapidly and is one of the major technology trends of this decade. But there is little public information on how open source is used in production environments. The analysis is too often based on very small sample sizes, is completely anonymous or is focused solely on the open source community. Modern software stacks are often mixed allowing a choice at each level between proprietary or open source components. This can be illustrated as follows:



Alfresco, as enterprise software, sits on top of this modern stack and integrates with end-user tools. The goal of the Open Source Barometer is to try to answer the following questions such as:

- How and where is open source growing?
- Is this growth different in different parts of the stack?
- Is there a clear leader in each element of the stack?
- Is usage varying between evaluation to deployment?
- Does open source have a different market evolution to traditional enterprise software?
- Are there differences by geography?
- What are the trends over time?

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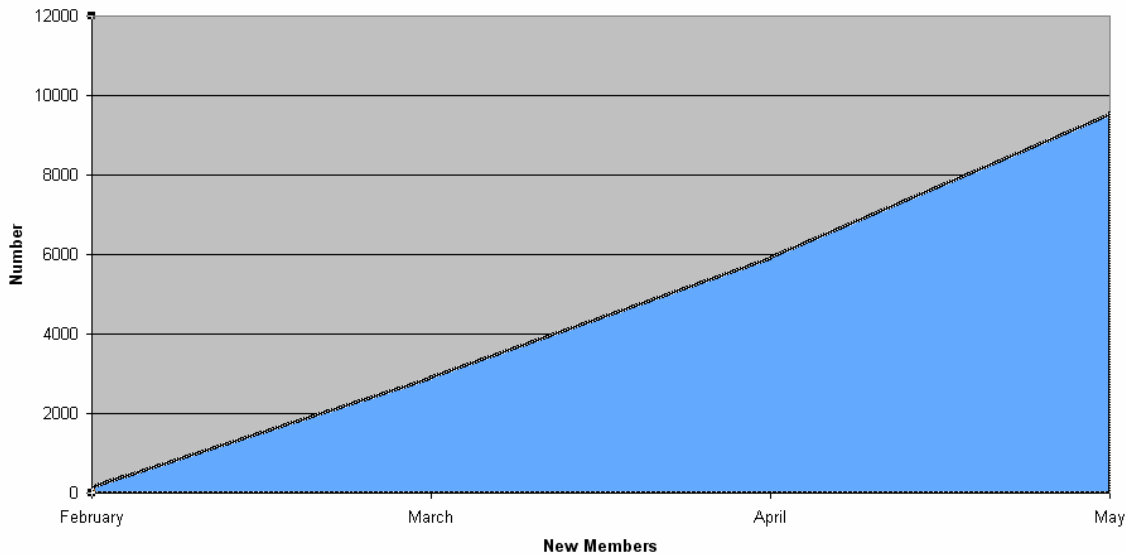
## THE OPEN SOURCE BAROMETER

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Alfresco provides valuable content on the Web free to the Alfresco community, including documentation, frequently asked questions and answers, sample applications, recorded webinars and training and white papers. There is also a shared space for community meeting information. 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.

Unlike most open source projects, Alfresco is predominantly deployed in large global 2000 organizations – financial services, media, professional services - and 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 10,000 community members contributing information.

The Alfresco Content Community is growing rapidly with the ratio of new members each month exceeding that of the previous month, as the graph below indicates.



*Chart 1: Alfresco Content Community new members between February & May 2007*

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## TOP LEVEL GEOGRAPHIC ANALYSIS

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The geographic distribution of community members responding to the survey is as follows:

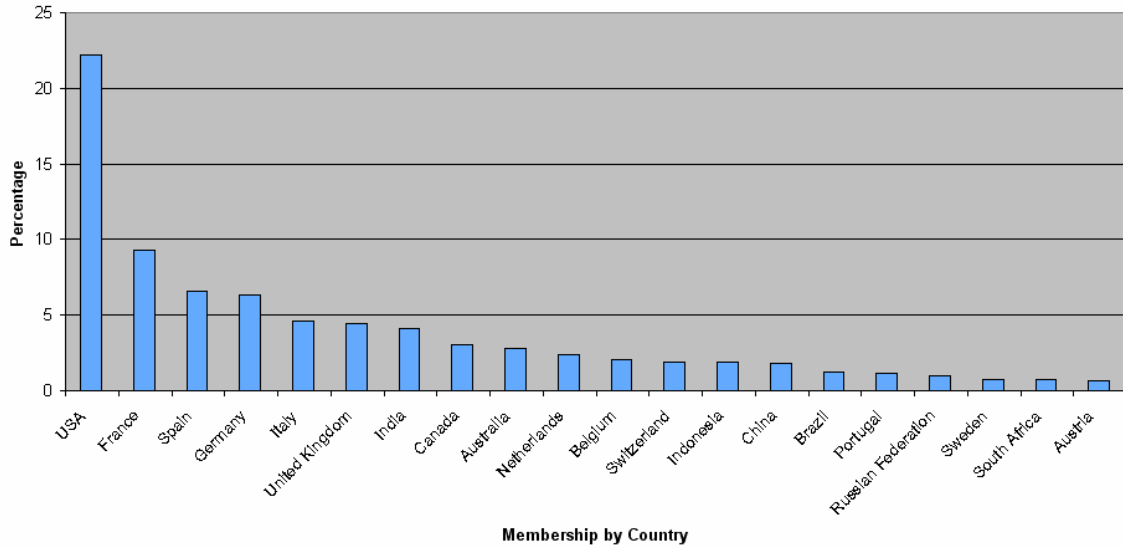


Chart 2: Alfresco Content Community percentage membership by country

This is an interesting distribution as traditionally enterprise software gains momentum in the U.S., crosses the Atlantic to form a beachhead in the U.K. and then moves on to Germany and France.

### ***Findings - Geographic adoption of open source:***

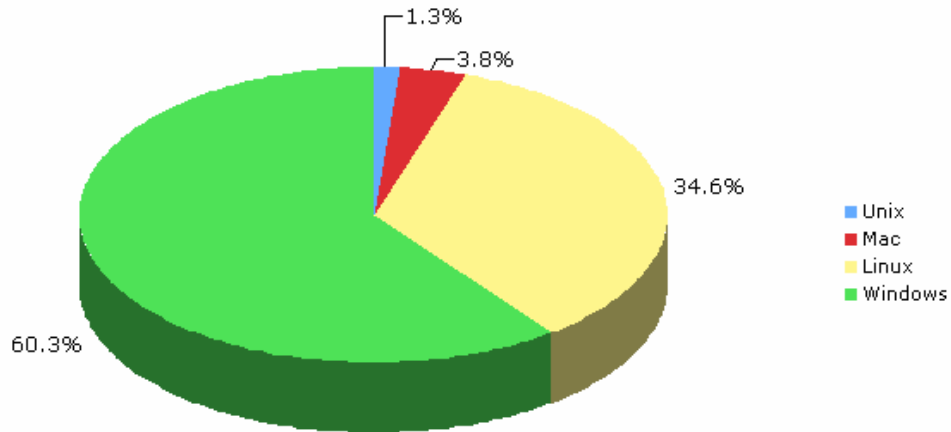
***“The survey found that the U.S. is leading open source adoption globally. We believe the Global 2000 is seeking innovation and better value for their technology investments whereas in Europe open source adoption is often driven by governments seeking better value for their citizens. The research also showed that the U.K. lags behind in the adoption of open source suggesting less government emphasis compared with other European countries such as France, Germany, Spain and Italy.”***

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## OPERATING SYSTEM ANALYSYS

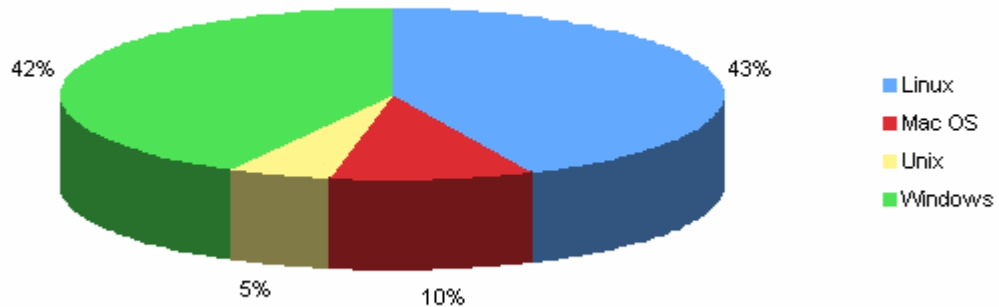
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The operating system analysis shows that Windows is a common platform on which the community intends to use Alfresco. This can be shown as follows:



*Chart 3: Alfresco Content Community Operating System usage*

A further poll researched this in more depth. It questioned intentions for evaluation and deployment. For the evaluation phase users were evenly split between Windows and Linux which is illustrated below:



*Chart 4: Alfresco Content Community Operating System usage in evaluation phase*

For the deployment phase users had a distinct preference for Linux which is shown as follows:

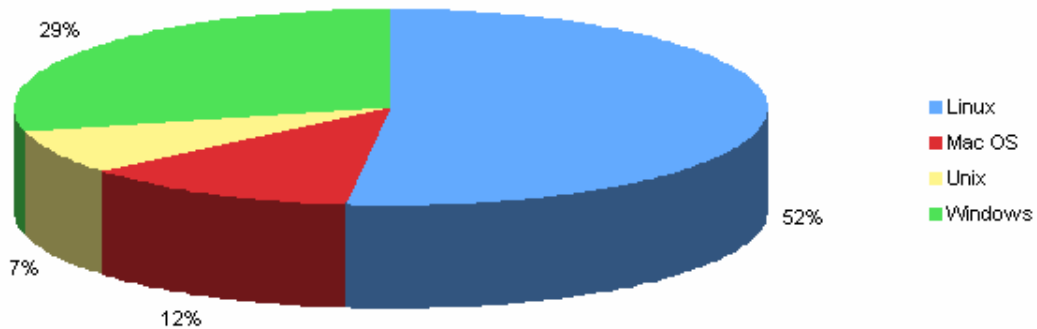


Chart 5: Alfresco Content Community Operating System usage in deployment phase

The breakdown of Linux variants was as follows:

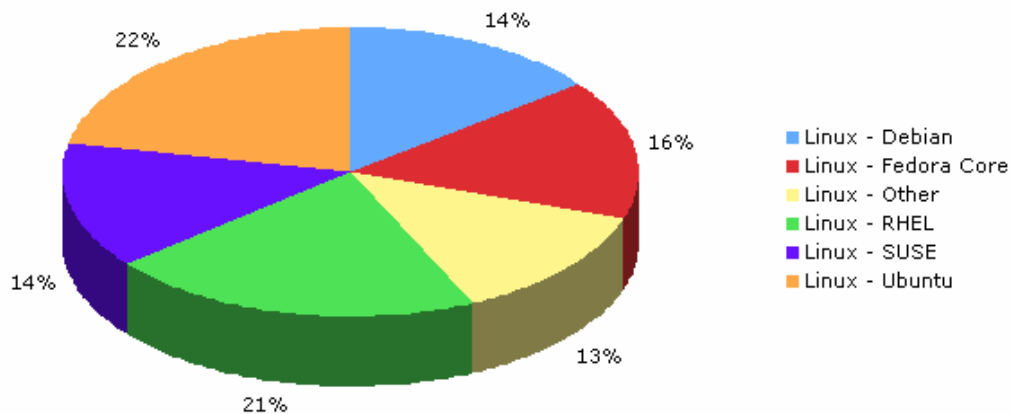


Chart 6: Alfresco Content Community Linux Operating System usage

Between RHEL and Fedora, Red Hat has 37% market share with Ubuntu at 22%. Further analysis of the changing growth rates of the Linux variants can be found in “Trends Over Time” (page 13).

**Findings - Operating systems:**

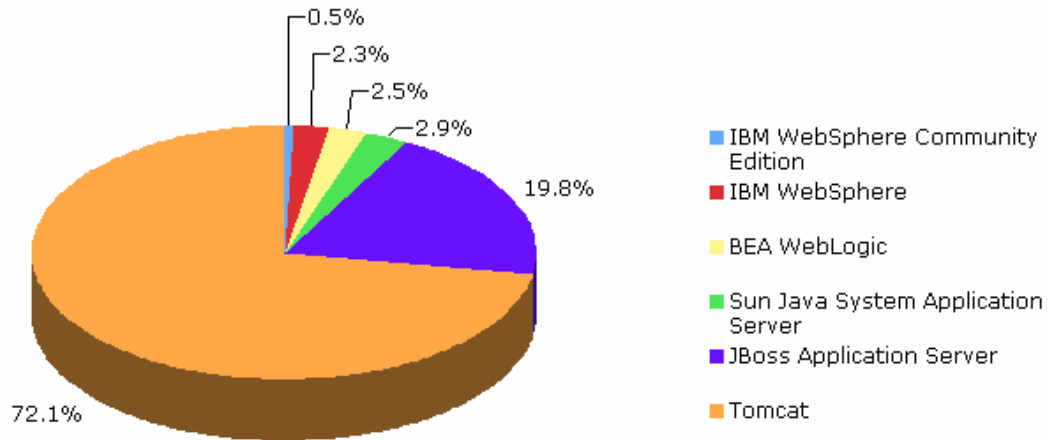
***“Surprisingly, users evaluated Alfresco as much on Windows as they did on Linux, but they strongly preferred to deploy production systems on Linux. Windows plays an increasingly important role in testing and evaluation because it is the operating system on most desktops.”***

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## APPLICATION SERVER ANALYSIS

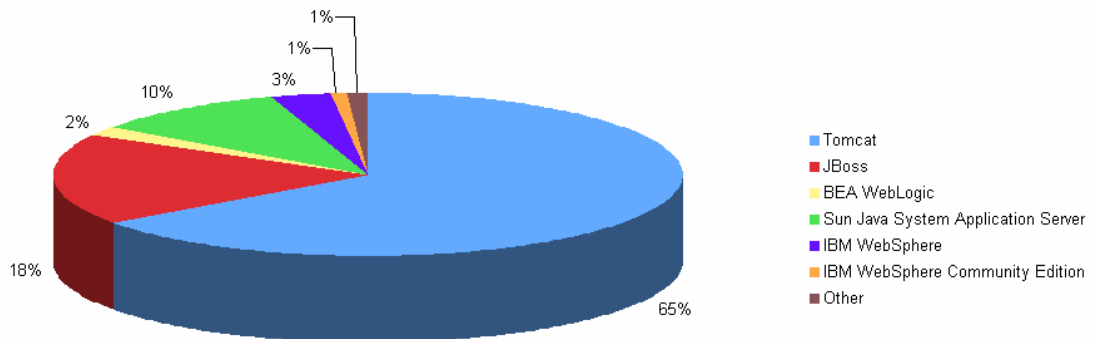
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The application server analysis shows that Tomcat is the dominant choice as illustrated below.



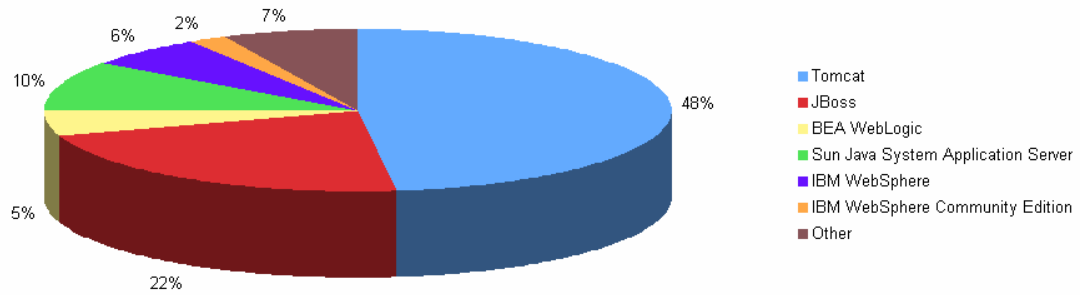
*Chart 7: Alfresco Content Community Application Server usage*

A further poll researched this in more depth. It questioned intentions for evaluation and deployment. This revealed the following for the evaluation phase:



*Chart 8: Alfresco Content Community Application Server usage in evaluation phase*

And the following for the deployment phase:



*Chart 9: Alfresco Content Community Application Server usage in deployment phase*

For the deployment phase there is a trend to more application server usage and when this occurs there is predominantly one choice – JBoss.

***Findings - Application servers:***

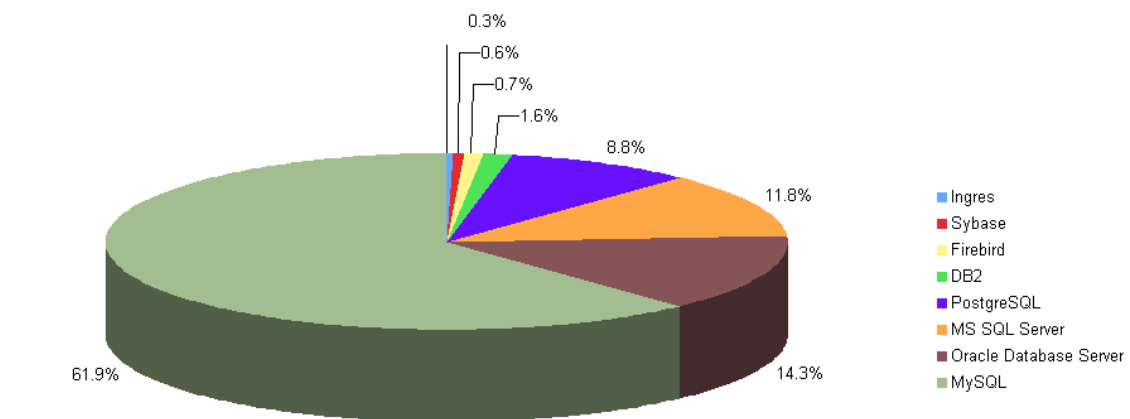
***“Users preferred open source Tomcat or JBoss over the leading proprietary offerings from Sun, IBM and BEA, even in production environments.”***

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## DATABASE ANALYSIS

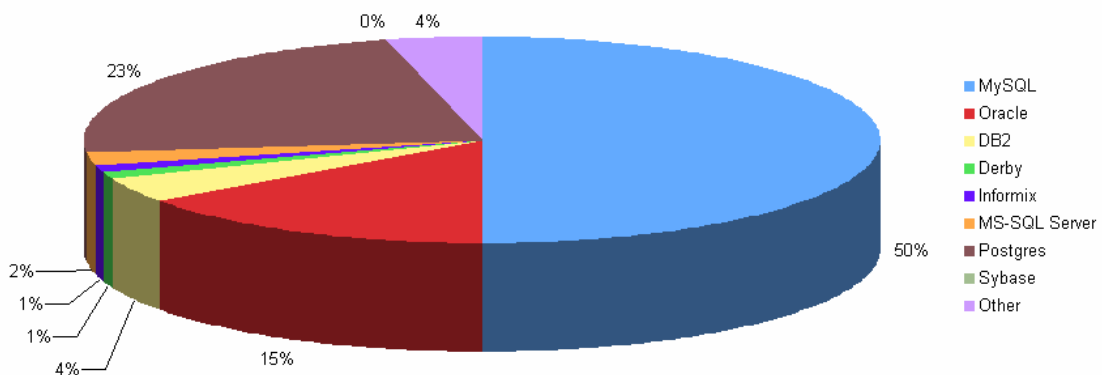
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The database analysis shows that MySQL is the dominant choice as illustrated below:



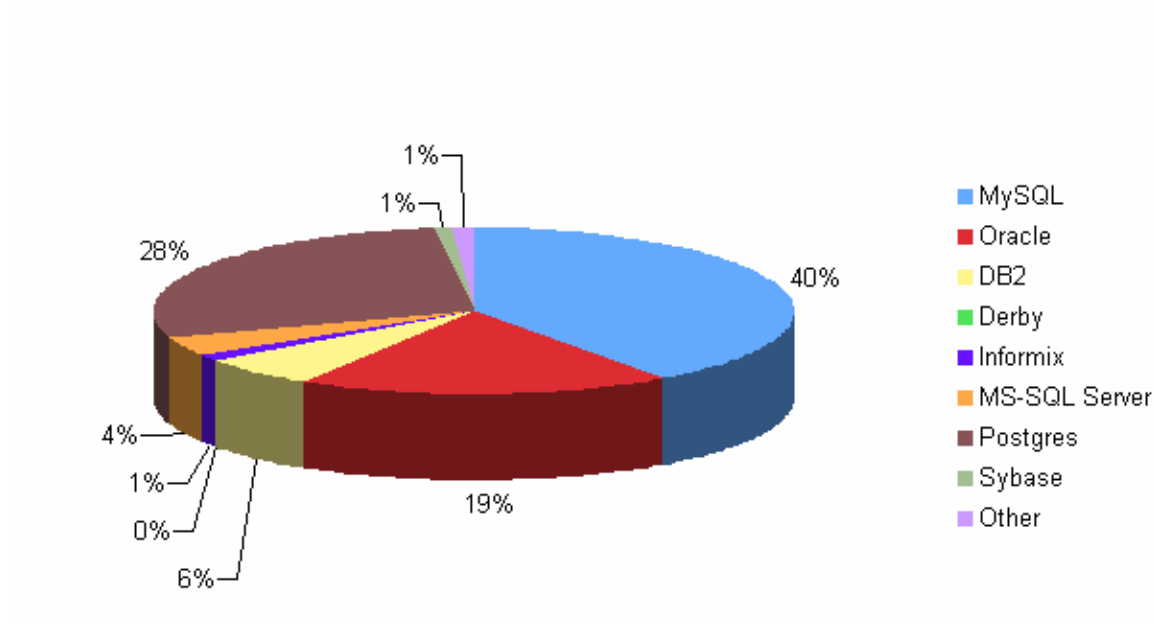
*Chart 10: Alfresco Content Community Database usage*

A further poll researched this in more depth. It questioned intentions for evaluation and deployment. This revealed the following for the evaluation phase:



*Chart 11: Alfresco Content Community Database usage in evaluation phase*

And the following for the deployment phase:



*Chart 12: Alfresco Content Community Database usage in deployment phase*

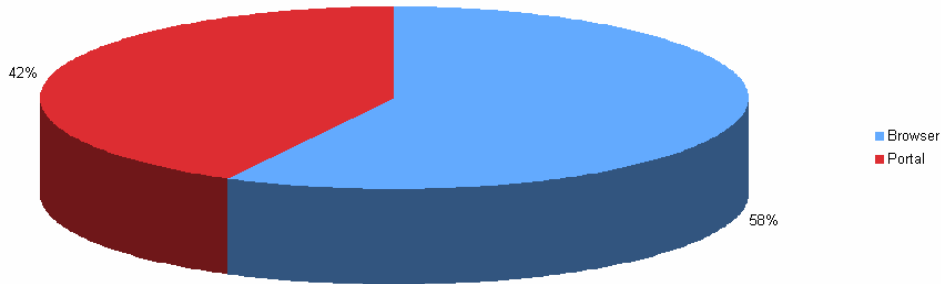
MySQL is the dominant choice in open source with Oracle being the dominant choice from proprietary vendors.

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## PORTAL AND BROWSER ANALYSIS

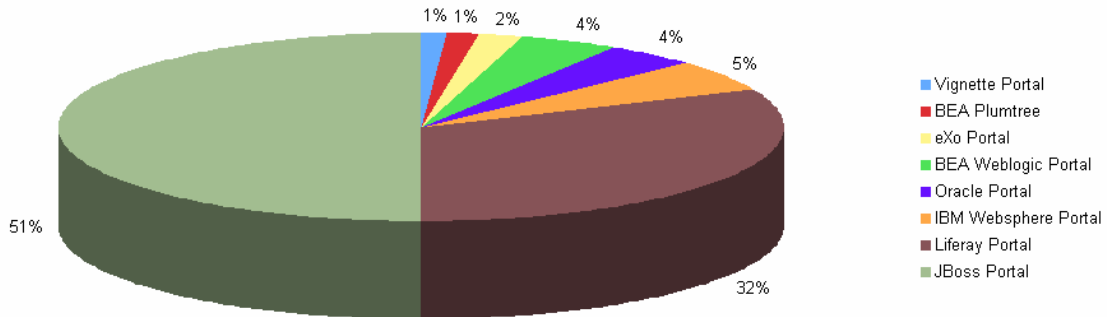
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Access to content is typically done via a browser or a portal. Analysis here aimed to distinguish the ratio and also when a portal was chosen which was preferred. The results can be shown as follows:



*Chart 13: Alfresco Content Community Portal vs Browser usage*

The browser is the preferred method of access with FireFox being used more than 70% of the time. When a portal is required the analysis was as follows:



*Chart 14: Alfresco Content Community Portal usage*

When portals are required, users choose JBoss portal or Liferay.

***Findings - Browsers and Portals:***

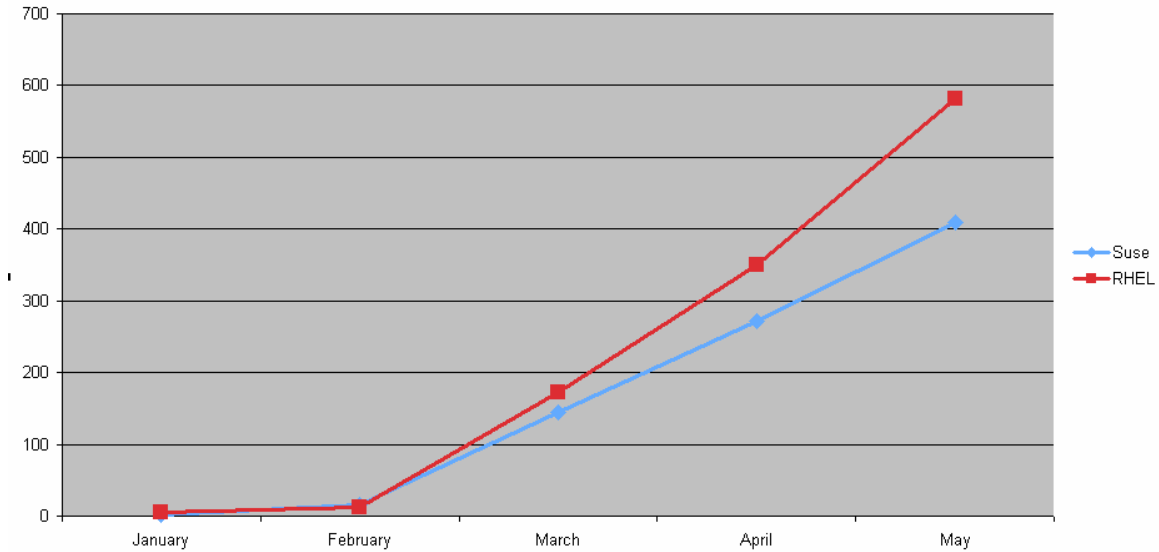
***“To access the Alfresco ECM repository, users preferred browsers over portals. Firefox was the most popular choice among different browsers. When users selected a portal preference, 80 percent chose Liferay or JBoss Portal.”***

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## TRENDS OVER TIME

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Analysis over time often revealed no change at the different layers of the software stack. However, one set of analysis revealed some interesting results: RHEL adoption increased much faster than Novell SUSE.



*Chart 15: Alfresco Content Community SUSE vs RHEL usage January and May 2007*

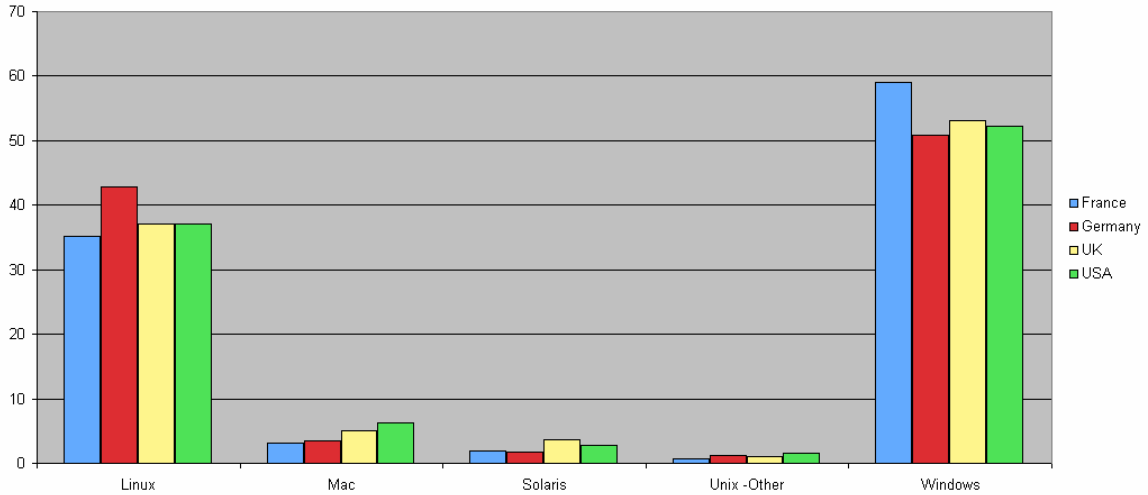
In the period during which Alfresco was growing rapidly, the new community members running their software stack on SUSE increased much more slowly. RHEL growth exceeded Novell SUSE and grew at a higher rate than the Alfresco community as a whole – increasing overall market share.

***Findings – Trends over time:***

***“What we've seen is that Alfresco's Content Community is growing quickly, with the ratio of new members each month exceeding that of the previous month. From March to May, for example, the Alfresco community new membership rate increased by over 130% month on month with Red Hat rates of new membership nearly tripling and Novell SUSE new membership rates remaining flat.”***

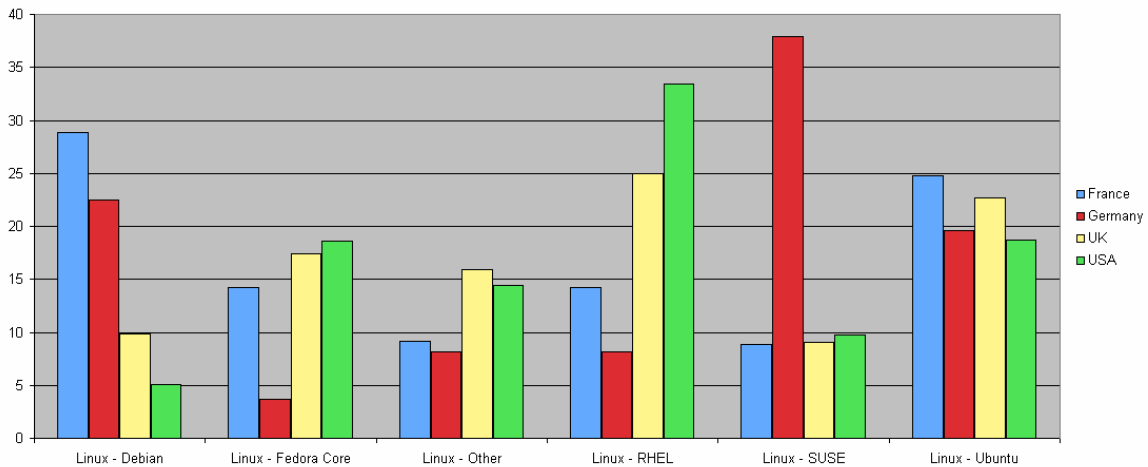
## GEOGRAPHIC ANALYSIS AND COUNTRY COMPARISON

Detailed geographic analysis revealed many similarities and some slight differences as shown below with regards to operating system adoption.



*Chart 16: Alfresco Content Community Operating System usage by country*

One variant that will be worth continuing to watch is that France has a higher preference for Windows compared to other countries. Analysis also showed interesting variations in preferences regarding Linux. SUSE is more popular in Germany, probably due to its heritage with RHEL and Fedora being most popular in the U.S.



*Chart 17: Alfresco Content Community Linux usage by country*

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## SUMMARY

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The Open Source Barometer provides a unique insight into trends and usage in a modern open source stack. An interesting observation is that the survey shows that, in nearly all cases there is a clear leader at each level in the stack but also that users typically deploy software stacks that mix proprietary and open source software.

The report, which will be published twice a year, focuses on:

- Enterprise Software usage
- Global - For geographic trend analysis
- Continuous - For time trend analysis

The Open Source Barometer is designed to be a continuous survey with the goal of providing a leading indicator on enterprise open source adoption trends. Regular updates will be posted on <http://blogs.alfresco.com/ianh/>

***Summary:***

***“The survey shows there is a clear leader at each level of the open source stack but also indicates an increasing trend for organizations to adopt a mixed stack, combining both open source and proprietary software, to enable use of best of breed components. The survey also illustrated that organizations require the flexibility to make component changes within the stack between evaluation and deployment phases.”***