

Q4 2008

Enterprise And SMB Software Survey, North America And Europe, Q4 2008

BUSINESS DATA SERVICES NORTH AMERICA AND EUROPE

Forrester fielded this online survey of 2,227 North American and European IT decision-makers between December 2008 and February 2009.

Forrester's 2008 software study was fielded to 2,227 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from companies with 2 or more employees. This survey is part of Forrester's suite of Business Data Services studies. Forrester fielded the survey from December 2008 to February 2009. e-Rewards fielded this survey online on behalf of Forrester. e-Rewards provided incentives to survey respondents. We have provided exact sample sizes in this report on a question-by-question basis.

Forrester's Business Data Services fields eight business-to-business technology studies in 12 countries each calendar year. For quality control, we carefully screen respondents according to job title and function. Business Data Services ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, quotas are set for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts.

In addition to sampling error, one should bear in mind that the practical difficulties in conducting surveys can introduce error or bias into the finding of opinion polls. Other possible sources of error in polls are probably more serious than theoretical calculations of sampling error. These other potential sources of error include question wording, question ordering, and nonresponse. As with all survey research, it is impossible to quantify the errors that may result from these factors without an experimental control group, so we strongly caution against using the words "margin of error" in reporting any survey data.

These statements conform to the principles of disclosure of the National Council on Public Polls.



Headquarters

Forrester Research, Inc., 400 Technology Square, Cambridge, MA 02139 USA
Tel: +1 617.613.6000 • Fax: +1 617.613.5000 • www.forrester.com

Screening questions [Ask questions in this section of all respondents]

QF1. What country are you located in? (Select one)

2. Canada
4. France
5. Germany
8. United Kingdom
9. USA
10. Other country (please specify) [SCREEN OUT]

QS1. Which of the following most closely describes your job title? (Select one)

1. Business leader (e.g., owner, CEO, CFO, President, etc.) [CONSIDER AN "EXECUTIVE."]
2. Senior-most IT decision-maker in the firm (e.g., CIO, VP of IT) [CONSIDER AN "EXECUTIVE"]
3. Executive in IT [CONSIDER AN "EXECUTIVE"]
4. Manager of IT reporting to an executive in IT
5. Executive in line of business (e.g., VP of Marketing, VP of Manufacturing)
6. IT professional, non-manager [SCREEN OUT]
7. Other non-IT professional (please specify) [SCREEN OUT]

QS2. In which of the following stages of IT purchasing are you involved? (Select all that apply)

[ROTATE]

1. Setting budgets [CONSIDER AN "EXECUTIVE"]
2. Requirements definition
3. Choosing/recommending vendors
4. RFP management
5. Authorizing purchases
6. None or don't know [SCREEN OUT]

[CREATE VARIABLE CALLED "EXECUTIVE". EXECUTIVE=1 IF QS1=1 OR 2 OR 3, OR QS2=1

QS3. Which of the following categories of software decision-making are you significantly involved in? (Select all that apply)

1. **Packaged application software** (e.g., ERP, CRM, finance and accounting)
2. **Information & Knowledge Management software** (e.g., email, team workspaces, content services, learning, business intelligence)
3. **Platform and infrastructure software** (databases, security, operating systems, content management, portals)
4. **Custom software development** (e.g., software languages, application servers, application architecture, or testing)
5. **None of the above** [SCREEN OUT]

QS4. What is your age?

[ENTER NUMERIC VALUE; IF LESS THAN 18 OR GREATER THAN 90, SCREEN OUT]

Firmographic questions [Ask questions in this section of all respondents]

QF2. Using your best estimate, how many employees work for your firm worldwide?
[ENTER NUMERIC VALUE; IF 0 OR 1, SCREEN OUT]

QF3A. Using your best estimate, what percentage of your employees use a computer for work? (please enter a percentage)

[ENTER NUMERIC PERCENTAGE FROM 0 TO 100]

98. Don't know

QF3B. Using your best estimate, what percentage of your employees work from home at least one day per week? (please enter a percentage)

[ENTER NUMERIC PERCENTAGE FROM 0 TO 100]

98. Don't know

[OPTIONAL; ASK OF US AND CANADA ONLY]

QF3. What is the name of the firm you work for?

Responses are kept completely confidential; this information will be used for gathering industry data only.

QF4: To which industry would you say that your firm belongs? (Select one)

Retail & Wholesale Distribution

1. Retail stores, includes Grocery Stores, Apparel Stores, Electronic Stores, Department Stores, Auto Dealers, Drug Stores, & Restaurants
2. Wholesale & Distribution

Business Services

3. Business Consulting, Accounting, & Legal
4. Construction Related Services (*includes Architecture Firms*)
5. Engineering Services
6. IT Consulting & Outsourcing Services
7. Real Estate & Facilities Management
8. Transportation & Logistics Services, includes airports, railroads, shipping, & trucking

Media, Entertainment, Leisure, or Consumer-Oriented Services

9. Consumer-Oriented Services
10. Entertainment & Recreation
11. Media, includes Publishing & Printing
12. Travel & Hospitality

Utilities & Telecommunications

13. Electricity
14. Telecommunications Services
15. Water & Waste

Finance & Insurance

16. Banking
17. Insurance (*includes P&C, Life, Health*)
18. Securities & Capital Markets

Public Sector

19. Education (*includes K-12, Colleges, Universities, & School Districts*)
20. Federal Government
21. Healthcare (*includes Hospitals*)
22. Nonprofit organizations (*includes Community Libraries*)
23. State & Local Government

Manufacturing

- 24. Aerospace & Defense
- 25. Agriculture
- 26. Automotive *(does not include Auto dealers, see Retail)*
- 27. Chemicals & Plastics
- 28. Clothing & Apparel, finished consumer products *(does not include unfinished goods, see Textiles; or Apparel Stores, see Retail)*
- 29. Computers & Electronics
- 30. Furniture & Home Furnishings *(does not include stores, see Retail)*
- 31. Industrial Electronics
- 32. Industrial Machinery & Equipment
- 33. Life Sciences, Pharmaceutical, Biotechnology, & Medical Devices *(does not include Hospitals & Healthcare, see Public Sector)*
- 34. Metals & Mining
- 35. Oil & Gas
- 36. Packaged Food & Beverage *(does not include Grocery Stores, see Retail)*
- 37. Paper, Wood, & other Raw Materials
- 38. Software
- 39. Textile goods *(does not include finished consumer products, see Clothing & Apparel)*

Other Industry

- 40. (Please specify)

[SHOW ONLY FOR US AND CANADA]

QF5A. What was your company's total annual revenue? (Select one)

- 0. Don't know/decline to answer
- .5. Less than \$1 Million
- 3. \$1-\$4.9 Million
- 5. \$5-\$9.9 Million
- 30. \$10-\$49.9 Million
- 75. \$50-\$99.9 Million
- 175. \$100-\$249.9 Million
- 375. \$250-\$499.9 Million
- 750. \$500-\$999 Million
- 1500. \$1-\$1.99 Billion
- 3500. \$2-\$4.9 Billion
- 7500. \$5-\$9.9 Billion
- 30000. \$10-\$49.9 Billion
- 75000. \$50-\$99.9 Billion
- 175000. \$100-\$249.9 Billion
- 375000. \$250-\$499.9 Billion
- 625000. \$500 Billion or more

[SHOW ONLY FOR UK]

QF5B. What was your company's total annual revenue? (Select one)

- 0. Don't know/decline to answer
- .5. Less than £1 Million
- 3. £1-£4.9 Million
- 5. £5-£9.9 Million
- 30. £10-£49.9 Million
- 75. £50-£99.9 Million
- 175. £100-£249.9 Million
- 375. £250-£499.9 Million
- 750. £500-£999 Million
- 1500. £1-£1.99 Billion
- 3500. £2-£4.9 Billion
- 7500. £5-£9.9 Billion
- 30000. £10-£49.9 Billion

- 75000. £50-£99,9 Billion
- 175000. £100-£249,9 Billion
- 375000. £250-£499,9 Billion
- 625000. £500 Billion or more

[SHOW ONLY FOR FRANCE AND GERMANY]

QF5C. What was your company's total annual revenue? (Select one)

- 0. Don't know/decline to answer
- .5. Less than €1 Million
- 3. €1-€4,9 Million
- 5. €5-€9,9 Million
- 30. €10-€49,9 Million
- 75. €50-€99,9 Million
- 175. €100-€249,9 Million
- 375. €250-€499,9 Million
- 750. €500-999 Million
- 1500. €1-€1,99 Billion
- 3500. €2-€4,9 Billion
- 7500. €5-€9,9 Billion
- 30000. €10-€49,9 Billion
- 75000. €50-€99,9 Billion
- 175000. €100-€249,9 Billion
- 375000. €250-€499,9 Billion
- 625000. €500 Billion or more

Spending questions [Ask questions only of those who selected QS2 1 or QS2 6]

[Note: Respondents who demonstrate lack of "Budget knowledge" have been cleaned out of this section]

[ASK ONLY FOR US AND CANADA]

QSP1A. In 2009, how much will your company spend on its overall IT budget (capital and operating budgets without depreciation)?

- 0. Don't know/decline to answer
- .005 Less than \$10,000
- .03 \$10,000-\$49,999
- .075 \$50,000-\$99,999
- .175 \$100,000-\$249,999
- .375 \$250,000-\$499,999
- .75 \$500,000-\$999,999
- 3. \$1-\$4.9 Million
- 5. \$5-\$9.9 Million
- 30. \$10-\$49.9 Million
- 75. \$50-\$99.9 Million
- 175. \$100-\$249.9 Million
- 375. \$250-\$499.9 Million
- 750. \$500-\$999 Million
- 1500. \$1-\$1.99 Billion
- 3500. \$2-\$4.9 Billion
- 7500. \$5-\$9.9 Billion
- 30000. \$10-\$49.9 Billion
- 70000. \$50 Billion or more

[ASK ONLY FOR UK]

QSP1B. In 2009, how much will your company spend on its overall IT budget (capital and operating budgets without depreciation)?

- 0. Don't know/decline to answer
- .005 Less than £10,000
- .03 £10,000-£49,999
- .075 £50,000-£99,999
- .175 £100,000-£249,999
- .375 £250,000-£499,999
- .75 £500,000-£999,999
- 3. £1-£4.9 Million
- 5. £5-£9.9 Million
- 30. £10-£49.9 Million
- 75. £50-£99.9 Million
- 175. £100-£249.9 Million
- 375. £250-£499.9 Million
- 750. £500-£999 Million
- 1500. £1-£1.99 Billion
- 3500. £2-£4.9 Billion
- 7500. £5-£9.9 Billion
- 30000. £10-£49.9 Billion
- 70000. £50 Billion or more

[ASK ONLY FOR FRANCE AND GERMANY]

QSP1C. In 2009, how much will your company spend on its overall IT budget (capital and operating budgets without depreciation)?

- 0. Don't know/decline to answer
- .005 Less than €10,000
- .03 €10,000-€49,999
- .075 €50,000-€99,999
- .175 €100,000-€249,999

- .375 €250,000-€499,999
- .75 €500,000-€999,999
- 3. €1-€4,9 Million
- 5. €5-€9,9 Million
- 30. €10-€49,9 Million
- 75. €50-€99,9 Million
- 175. €100-€249,9 Million
- 375. €250-€499,9 Million
- 750. €500-€999 Million
- 1500. €1-€1,99 Billion
- 3500. €2-€4,9 Billion
- 7500. €5-€9,9 Billion
- 30000. €10-€49,9 Billion
- 70000. €50 Billion or more

QSP2. What is the allocation of your overall IT budget (on a cash-outlay basis) into the following categories? (please enter percentages)

- 1. Operating budget (spending on IT staff, consulting and outsourcing services, software maintenance and subscription fees, telecommunications services, and any other IT purchases that are expensed)
- 2. Capital expenditure budget (investment in software, computer equipment, and communications equipment that are treated as capital and then depreciated)
- 3. Other (please specify)
- 98. Don't know

[THE ABOVE SHOULD TOTAL 100%, AND THEY MAY LEAVE ANY ITEM BLANK IF THEY WISH. IF THEY ENTER DON'T KNOW, SKIP TO QVEN1]

QSP3. How much of your firm's IT operating budget is allocated to each of the following categories? How do you expect it will be allocated next year? (please enter percentages)

Current	12 months from now
---------	--------------------

- 1. **Full-time IT staff** (salaries and benefits)
- 2. **Expensed software costs** (including expensed new licenses, maintenance and software subscription fees, and new internal or outsourced software development that is expensed)
- 3. **Expensed hardware infrastructure** (e.g., leases or non-capitalized purchases of networking hardware, storage, PCs, servers)
- 4. **Third-party IT services** (e.g., consulting, systems integration, outsourcing)
- 5. **Telecommunications and network services** (voice and data transmission services, e.g., AT&T, Verizon)
- 6. **Other** (e.g., energy costs, T&E, occupancy costs, etc) (please specify)

[THE ABOVE SHOULD TOTAL 100%, AND THEY MAY LEAVE ANY ITEM BLANK IF THEY WISH IF THEY SELECT DON'T KNOW, SKIP THEM TO THE VENDOR QUESTIONS]

98. Don't know

QSP4. How much of your firm's IT capital expenditure budget is allocated to the following categories? How do you expect it will be allocated next year? (please enter percentages)

Current	12 months from now
---------	--------------------

- 1. **Computer hardware** (PCs, servers, storage)
- 2. **Networking and communications hardware** (routers, switches, PBXs, modems)
- 3. **Software** (license costs for purchased software, cost of custom built software, and any software implementation costs that are capitalized)
- 4. **Other** (please specify)

[THE ABOVE SHOULD TOTAL 100%, AND THEY MAY LEAVE ANY ITEM BLANK IF THEY WISH IF THEY SELECT DON'T KNOW FOR THE CURRENT BUDGET, SKIP TO QVEN1 QUESTIONS]

98. Don't know

QSP5. For 2009, approximately what percent of your firm's combined capital and operating budget for software will go to new initiatives and projects versus ongoing operations and maintenance?

1. New software initiatives and projects
2. Ongoing software operations and maintenance
98. Don't know

[MUST TOTAL 100%]

QSP6. How will your firm's 2009 combined capital and operating budget for software break out across the following spending categories?

1. **Software licenses** (i.e. new licenses & software depreciation)
2. **License maintenance fees & code maintenance** (i.e., bug fixes, required updates)
3. **Software subscription fees** (i.e., Software-as-a-Service)
4. **New internal software development**
5. **New outsourced software development**
6. **Other** (please specify)
98. **Don't know**

[MUST TOTAL 100%]

QSP7. How will your firm's 2009 combined capital and operating budget for software break out across the following product categories?

1. **Packaged application** software (e.g., ERP, CRM, finance & accounting)
2. **Information & Knowledge Management** software (e.g., email, team workspaces, content services, learning, business intelligence)
3. **Platform and infrastructure** software (databases, security, operating systems, content management, portals)
4. **Custom software development** (e.g., software languages, application servers, application architecture, or testing issue)
5. **Other** (please specify)
98. **Don't know**

[MUST TOTAL 100%]

QSP8. How do you expect the current global economic conditions will impact your firm's IT spending over the next 12 months? (Select one)

1. My firm will spend less than last year
2. My firm will spend about the same as last year
3. My firm will spend more than last year

[SHOW ONLY IF QSP8=1 OR 3; THEY WILL SPEND MORE OR LESS THAN LAST YEAR]

QSP9. You said that you expect your budget to [INCREASE | DECREASE]. By how much do you expect it to [INCREASE | DECREASE]? (please enter a percentage)

Vendor questions [Ask questions in this section of all respondents]

QVEN1. Which of the following software vendors is your firm currently a customer of (Select all that apply)

1. Adobe for software (other than Acrobat)
2. BMC
3. Citrix Systems
4. CA (Computer Associates)
5. EMC
6. force.com (for platform as a service)
7. Fujitsu
8. Google's App Engine (for platform as a service)
9. HP for systems management
10. IBM for middleware and infrastructure (Websphere, DB2, Information management)
11. IBM for portals, collaboration, email (Lotus, Portals, Workplace)
12. IBM software development and systems management (Rational, Tivoli)
13. Infor Global Services
14. Microsoft, including SQL, Dynamics, SharePoint (does not include Windows, Office, or Exchange)
15. Novell
16. Oracle PeopleSoft/Siebel applications (not including platform software)
17. Oracle platform software, includes database, BEA (not including former PeopleSoft/Siebel applications)
18. Progress Software
19. Sage Software
20. salesforce.com
21. SAP
22. SAS
23. Software AG
24. Sun
25. Sybase
26. Symantec
27. Ultimate Software
28. Verisign
29. None of the above [EXCLUSIVE]
98. Don't know [EXCLUSIVE]

[PIPE IN ANY SELECTED IN QVEN1. IF NONE/DON'T KNOW IS SELECTED, SKIP TO PURCHASING QUESTIONS]

QVEN2. Thinking about 2009, how do you expect your firm's software spending to change with each vendor? (Select one for each row)

<u>1.</u>	<u>2.</u>	<u>3.</u>	<u>4.</u>	<u>98.</u>
Stop spending with this company	Spend <u>less</u> with this company	Spend about the <u>same</u>	Spend <u>more</u> with this company	Don't know

Purchasing questions [Ask questions in this section of all respondents]

QP1. How influential are the following parties in your firm’s software purchasing decisions? (Select one for each row)

1.	2.	3.	4.	98.
Has no influence whatsoever	Somewhat influential	Very influential	Has complete authority	Don’t know/NA

1. Business leader (e.g., owner, CEO, CFO, President, etc.)
2. Senior-most IT decision-maker in the firm (e.g., CIO, VP of IT)
5. Senior-most line of business executive (e.g., VP of Marketing, VP of Manufacturing)
4. Software vendor
5. Value-added reseller (VAR), systems integrator (SI), or other party that might also implement the application
6. Industry analyst
7. Consultant

QP2. How important are the following criteria to your firm when selecting software? (Select one for each row)

1.	2.	3.	4.	5.	98.
Not at all important				Very important	Don’t know/NA

[ROTATE]

1. Overall functionality
2. Overall system cost (including software licenses, hardware costs, and implementation costs)
3. Software pricing/licensing model (e.g., licensed, subscription, open source)
4. References from other companies
5. Availability of service and support
6. Application’s ability to integrate with your firm’s other systems
7. Software brand (e.g., Microsoft, Oracle, etc.)

QP3. From which source or channel does your firm prefer to purchase software? (Select one)

1. Local or regional value-added reseller or systems integrator (VAR/SI)
2. Large or national value-added reseller or systems integrator (VAR/SI)
3. Direct from the software vendor (i.e., Microsoft, Oracle)
4. Large direct reseller (CDW, Insight, Zones)
5. Other (please specify)
98. Don’t know

[IF QP3 DOES NOT EQUAL 1 OR 2, SKIP TO QP4]

QP3A. How important are the following when choosing a value-added reseller (VAR) or systems integrator (SI) to work with when purchasing and implementing your major applications? (Select one for each row)

1.	2.	3.	4.	5.	98.
Not at all important				Very important	Don’t know / Does not apply to me

[ROTATE]

1. Understands the vertical industry needs of the business
2. Overall experience in implementing the application
3. References from other end user companies
4. Ability to offer a complete solution
5. Certifications and qualifications from the vendor

QP4. Has a third party ever audited your firm’s usage of software licenses? (Select one)

- 1. Yes
- 2. No
- 98. Don't know

[IF QP4=2 OR 98, SKIP TO QP5]

QP4A. What was the result of your firm's most recent software inventory and spending audit? (Select one)

- 1. We uncovered significant unlicensed software usage
- 2. We uncovered significant license overspending compared to usage
- 3. Neither, there was no significant difference
- 98. Don't know

QP5. Does your firm attempt to time software purchases to the following? (Select one for each row)

1.	2.	98.
Yes	No	Don't know

- 1. Your firm's fiscal year end
- 2. Your vendor's fiscal year end
- 3. Your vendor's fiscal quarter end

QP6. Does your firm use vendor financing for any of your purchases? (select one)

- 1. Yes
- 2. No
- 98. Don't know

[SHOW ONLY IF QP6=1]

QP6A. Why does your firm use vendor financing? (Select all that apply)

- 1. Lower financing cost compared to bank financing
- 2. Creating a smaller, regular payment over time instead of a large initial payment
- 3. Reduced prices or greater discount as part of the financing deal
- 4. Other reason (please specify)

Software Strategy questions [Ask this section of all respondents]

QSS1. Thinking of your firm’s current planning cycle, how important are each of the following goals? (Select one for each row)

1.	2.	3.	4.	5.	98.
Not at all important				Very important	Don't know

[ROTATE]

1. Reduce IT costs
2. Use information technologies to increase innovation
3. Support regulatory requirements
4. Increase ability to meet unmet demands for IT services
5. Address IT staffing and skills challenges
6. Reduce the number of (major) software vendors that we work with
7. Move some/more enterprise applications to off-premise providers
8. As quality control test, please select the second option for this row
9. Improve integration between applications
10. Improve communication to business of IT value
11. Expand our use of open source software
12. Expand use of Software-as-a-Service (SaaS is an application which you don't own, it is hosted remotely, and a monthly usage fee is paid)

[IF QSS1_8 DOES NOT EQUAL 2, SCREEN OUT]

QSS2. Thinking of your firm’s current planning cycle, how important are each of the following software initiatives? (Select one for each row)

1.	2.	3.	4.	5.	98.
Not at all important				Very important	Don't know

[ROTATE]

1. Consolidate or rationalize enterprise applications
2. Outsource application maintenance and/or support
3. Outsource application development
4. Upgrade enterprise applications to newer release
5. Increase deployment and use of collaboration technologies
6. Implement “green” (energy saving) software tools to cut operations costs
7. Expand use of agile software development
9. Update/modernize key legacy applications

QSS3. What percentage of your firm’s applications are/will be deployed in the following ways, now and two years from now?

[EACH COLUMN SUMS TO 100]

Today	2 years from now				
1.	On premise physical server				
2.	On premise virtual server				
3.	Physical server at hosting provider				
4.	Virtual server at hosting or cloud service provider				
5.	ASP, or specialized application service provider				
6.	Software-as-a-Service (SaaS)				
98.	Don't know				

QSS4. What are your firm’s plans to implement or expand its use of the following software technologies in the next 12 months? (Select one for each row)

98.	1.	2.	3.	4.	5.	6.
Not	Interested/	Piloting	Implementing/	Expand/upgrade	Decreasing	Removing

interested/ don't know	considering		implemented	existing implementation		
---------------------------	-------------	--	-------------	----------------------------	--	--

[ROTATE]

1. Information lifecycle management (ILM)
2. Enterprise service bus (ESB)
3. Advanced analytics like predictive or operational analytics
4. Application lifecycle management (ALM)
5. Business Process Management (BPM)
6. Information as a Service or "Data Services"
7. Complex Event Processing
8. Event-Driven applications
9. Platform as a service/cloud computing platform
10. Mobile development tools and mobile middleware
11. Unified communications technologies
12. Contract lifecycle management
13. Open Source Software
14. Business Event Management
15. Business Activity Management
16. Business Rules engines

[ASK ONLY IF QSS4_13 "OPEN SOURCE SOFTWARE" = 98 OR 1]

QSS3A. How concerned is your firm about the following aspects of open source software? (Select one for each row)

1.	2.	3.	4.	5.	98.
Not at all concerned				Very concerned	Don't know

[ROTATE]

1. Availability of service and support
2. Product immaturity
3. Total cost of ownership
4. Legal issues involving intellectual property
5. Security of the software
6. Viability of the open source communities
7. Overall complexity and difficulty of adoption **[FIX THIS IN THE LAST POSITION]**

[ASK ONLY IF QSS4_13 "OPEN SOURCE SOFTWARE" = 2,3,4,5]

QSS3B. Which of the following BEST describes your firm's FORMAL policy toward open source software? (Select one)

1. We don't have a formal policy for use of open source software
2. We only use open source development tools and runtimes
3. We aggressively adopt open source software in development and production environments
4. We evaluate open source options before commercial options and select open source development tools and production runtimes whenever practical
5. We will use open source development tools and runtimes if they are packaged within commercial tools or runtimes
6. We will use open source in development and in development tools, but do not allow or support open source runtimes in production
7. We do not allow or use open source tools or runtimes
98. Don't know

QSS5. Which of the following best describes your firm's approach to, or use of, service-oriented architecture (SOA)? (Select one)

(SOA is a method of conceptualizing, designing, and building applications by assembling reusable building blocks, each of which is usually represented as a service.)

1. Not pursuing, and no immediate plans to do so **[SKIP TO THE NEXT SECTION]**

- 2. We will pursue SOA within 12 months
- 3. We use SOA but we do not have an enterprise-level strategy for SOA
- 4. We use SOA and we do have (or are building) an enterprise-level strategy and commitment for SOA
- 98. Don't know

[IF SS5=DON'T KNOW, SKIP TO THE NEXT SECTION]

[ASK ONLY IF QSS5 = 2 (WILL PURSUE), 3 (DO NOT HAVE) , OR 4 (HAVE STRATEGY)]

QSS6. Which of the following have been major drivers for SOA adoption? (Select all that apply)

- 1. Lower software development and integration costs
- 2. Lower business costs
- 3. Improved business flexibility
- 4. Improved application flexibility
- 5. Other (please specify)
- 6. Don't know **[EXCLUSIVE]**

[ASK ONLY IF SS5 =3 (DO NOT HAVE) OR 4 (DO HAVE ENTERPRISE STRATEGY)]

QSS7. Which of the following best describes your firm's level of satisfaction with SOA? (Select one)

- 1. SOA has delivered most or all the benefits we expected, and we will continue to expand our use of SOA
- 2. SOA has delivered less benefit than expected, but enough that we will continue to expand our use of SOA
- 3. We struggle to get the benefits we expected, and we won't expand our use until we resolve the issues
- 4. We have seen little or no benefit, and we will cut back on our use of SOA
- 5. It's too early to tell

[ASK ONLY IF QSS5 =3 (DO NOT HAVE) OR 4 (DO HAVE ENTERPRISE STRATEGY.)

QSS8. How is your firm currently using SOA? (Select all that apply)

- 1. Internal integration (i.e., application integration within your firm)
- 2. External integration (i.e., integration with other companies)
- 3. Pure data or information access (i.e., no business logic)
- 4. Strategic business transformation
- 5. Other (please specify)

[ASK ONLY IF QSS5 =3 (DO NOT HAVE) OR 4 (DO HAVE ENTERPRISE STRATEGY.)

QSS9. Including projects for both new applications and changes to existing applications, approximately how much of your firm's solution delivery projects use SOA? (Select one)

- 1. Less than 10% of projects
- 2. 10% to 24% of projects
- 3. 25% to 50% of projects
- 4. More than 50% of projects
- 5. Don't know

[ASK ONLY IF QSS5=3 (DO NOT HAVE) OR 4 (DO HAVE ENTERPRISE STRATEGY)]

QSS10. Across your firm, how are the following messaging types used to access your SOA-based services? (Select one for each row)

1.	2.	3.	98.
It is a critical part of our SOA strategy	We use it for SOA, but only occasionally	We do not use it for SOA	Don't know

[ROTATE]

- 1. SOAP over HTTP
- 2. REST-based services; XML over HTTP
- 3. Java Message Service (JMS)
- 4. Other messaging queuing (not JMS) **[FORCE IN THE LAST POSITION]**

Information and Knowledge Management questions [Ask of respondents who selected QS3_2]

QIKM1. Now we'd like to ask you about Information and Knowledge Management Software.

Thinking of your firm's current planning cycle, how important are each of the following information and knowledge management software initiatives? (Select one for each row)

1.	2.	3.	4.	5.	98.
Not at all important				Very important	Don't know

[ROTATE]

1. Consolidate your firm's email systems
2. Implement an enterprise collaboration strategy
3. Implement a learning management system
4. Implement Web 2.0 technologies such as blogs, wikis, or RSS
5. Deploy a master data management initiative
6. Optimize your office fleet of printers, fax, and scanners
7. Implement an enterprise search strategy

QIKM2. What are your firm's plans to implement or expand its use of the following information and knowledge management software technologies in the next 12 months? (Select one for each row)

98.	1.	2.	3.	4.	5.	6.
Not interested/ don't know	Interested/ considering	Piloting	Implementing/ implemented	Expand/upgrade existing implementation	Decreasing	Removing

[ROTATE]

1. **Business Intelligence software**
2. **Collaboration software** (e.g., email, calendaring, contacts, instant messaging, Web conferencing, team collaboration, Web 2.0)
3. **Content management software** (e.g., Web content management, document management, records management)
4. **Learning management software** (e.g., learning management software, virtual classroom, informal learning)
5. **Information access software** (e.g., enterprise search, desktop search, text analytics)

[ASK ONLY IF QIKM2_1 "BUSINESS INTELLIGENCE SOFTWARE" = 1, 2, 3, 4,5]

QIKM3. What are your firm's plans to implement or expand its use of the following business intelligence technologies in the next 12 months? (Select one for each

98.	1.	2.	3.	4.	5.	6.
Not interested/ don't know	Interested/ considering	Piloting	Implementing/ implemented	Expand/upgrade existing implementation	Decreasing	Removing

[ROTATE]

1. Reporting tools
2. Data visualization
3. Business performance solutions
4. Analytic software and analytic appliances
5. Text analytics
6. Complex event processing
7. Specialized database engines (e.g., OLAP, columnar databases, warehouse appliances)
8. Data quality management

QIKM4. Thinking about all of your firm's employees that use a computer at work, what percentage of them would you estimate use each of the following collaboration tools at work? If you're not sure, please enter your best estimate. (enter a percentage for each)

[ROTATE]

1. Blogs
2. Wikis
3. Email
4. Instant Messaging
5. Employee portal
6. Team workspaces
7. Web conferencing
8. Video conferencing
9. Audio conferencing

[ENTER A PERCENTAGE FOR EACH. NUMBERS MAY RANGE FROM 0 TO 100]

[ASK ONLY IF QIKM2_2 "COLLABORATION SOFTWARE" = 1, 2, 3, 4,5]

QIKM5. What are your firm's plans to implement or expand its use of the following collaboration technologies in the next 12 months? (Select one for each row)

98.	1.	2.	3.	4.	5.	6.
Not interested/ don't know	Interested/ considering	Piloting	Implementing/ implemented	Expand/upgrade existing implementation	Decreasing	Removing

[ROTATE]

1. Email
2. Instant messaging
3. Team workspaces (e.g., SharePoint, Lotus Notes)
4. Portals
5. Enterprise search
6. Searching video, voice or images
7. Web conferencing (e.g., WebEx, Microsoft LiveMeeting)
8. Video conferencing
9. Mobile phones for email, calendaring

QIKM6. How satisfied is your firm with the following collaboration technologies? (Select one for each row)

1.	2.	3.	4.	5.	98.
Not at all satisfied				Very satisfied	Don't know

[PIPE IN PREVIOUS LIST FROM QIKM5 WHERE THE RESPONSES ARE 2,3,4,5]

1. Email
2. Instant messaging
3. Team workspaces (e.g., SharePoint, Lotus Notes)
4. Portals
5. Enterprise search
6. Searching video, voice or images
7. Web conferencing (e.g., WebEx, Microsoft LiveMeeting)
8. Video conferencing
9. Mobile phones for email, calendaring

[ASK ONLY IF QIKM2_2 "COLLABORATION SOFTWARE" = 2,3,4,5]

QIKM7. In 2009, which vendors' Collaboration software is your firm likely to purchase? (Select all that apply)

1. Adobe
2. Cisco
3. Google
4. IBM

- 5. Microsoft
- 6. Novell
- 7. Oracle
- 8. Other (please specify)
- 98. Don't know

QIKM8. What are your firm's plans to implement or expand its use of the following Web 2.0 technologies in the next 12 months? (Select one for each row)

98.	1.	2.	3.	4.	5.	6.
Not interested/ don't know	Interested/ considering	Piloting	Implementing/ implemented	Expand/upgrade existing implementation	Decreasing	Removing

[ROTATE]

- 1. Blogs
- 2. Podcasts
- 3. Wikis (enterprise or departmental)
- 4. RSS (Really Simple Syndication)
- 5. Social networking tools (e.g., Facebook, LinkedIn)
- 6. Discussion forums
- 7. Idea generation or management tools
- 8. Virtual Worlds for online meetings or presentations (e.g., Second Life)
- 9. Mashups
- 10. Microblogs

[ASK ONLY IF SOMEONE SELECTS 2,3,4,5,6 FOR ANY ROW IN QIKM8. IF THEY SELECT ALL 98S OR 1S, SKIP QIKM9]

QIKM9. For which of the following activities is your firm currently using Web 2.0 tools and technologies? (Select all that apply)

- 1. Managing projects
- 2. Fostering collaboration within a division or group
- 3. Locating experts / expertise
- 4. Corporate communications
- 5. Improving employee services
- 6. Capturing and sharing knowledge
- 7. Fostering innovation
- 8. Reducing use of email or face-to-face meetings
- 9. Modernizing the intranet portals
- 10. Other (please specify)
- 11. None of the above **[EXCLUSIVE]**

[ASK ONLY IF QIKM2_3 "CONTENT MANAGEMENT SOFTWARE" = 2,3,4 5]

QIKM10. In 2009, which vendors' Content Management software is your firm likely to purchase? (Select all that apply)

- 1. EMC
- 2. Hyland Software
- 3. IBM
- 4. Interwoven
- 5. Microsoft
- 6. Novell
- 7. Oracle
- 8. Open Text
- 9. Vignette
- 10. Other (please specify)
- 98. Don't know **[EXCLUSIVE]**

[ASK ONLY IF QIKM2_4 “LEARNING MANAGEMENT SOFTWARE” = 2,3,4,5]

QIKM11. In 2009, which vendors’ Learning Management software is your firm likely to purchase? (Select all that apply)

- 1. GeoLearning
- 2. Oracle PeopleSoft
- 3. Oracle Learning Management (OLM)
- 4. Oracle iLearning
- 5. Plateau System
- 6. Saba
- 7. SAP
- 8. SumTotal Systems
- 9. Other (please specify)
- 98. Don’t know [EXCLUSIVE]

[ASK ONLY IF QIKM2_5 “INFORMATION ACCESS SOFTWARE” = 2,3,4 OR 5]

QIKM12. In 2009, which vendors’ Information Access software is your firm likely to purchase? (Select all that apply)

- 1. Autonomy
- 2. Endeca Technologies
- 3. Google
- 4. IBM
- 5. Microsoft/FAST Search and Transfer
- 6. Oracle, X1
- 7. Vivisimo
- 8. Other (please specify)
- 98. Don’t know [EXCLUSIVE]

QIKM13. Which vendors does your firm currently use for email software? (Select all that apply)

- 1. IBM
- 2. Microsoft
- 3. Novell
- 4. Oracle
- 5. Other (please specify)
- 98. Don’t know [EXCLUSIVE]

QIKM14. Does your firm use Microsoft SharePoint? (Select all that apply)

- 1. Yes, Microsoft Office SharePoint Server 2007
- 2. Yes, SharePoint Portal Server 2003
- 3. Yes, Windows SharePoint Services 2.0 or 3.0
- 4. No[EXCLUSIVE]
- 98. Don’t know[EXCLUSIVE]

QIKM15. Does your firm use Lotus Notes? (Select all that apply)

- 1. Yes, for email
- 2. Yes, for applications
- 3. No[EXCLUSIVE]
- 4. Don’t know [EXCLUSIVE]

[IF THEY USE ANY SHAREPOINT, SHOW SHAREPOINT ROW; IF THEY USE ANY LOTUS NOTES, SHOW NOTES ROW]

QIKM16. How satisfied is your firm with the following? (Select one)

1.	2.	3.	4.	5.	98.
Not at all satisfied				Very satisfied	Don’t know

- 1. Microsoft Sharepoint
- 2. Lotus Notes

Packaged Applications questions [ask of those selected QS3_1 “packaged applications”]

QPA1. Now we’d like to ask you about Packaged Applications.

When implementing a major application, which of the following best describes the type of deployment option your firm prefers? (Select one)

1. A custom-developed application
2. A packaged application or application modules
3. A pre-integrated application suite
4. A tailored solution assembled from existing-custom and packaged-application modules
5. Software-as-a-Service
6. Hosted solution (multi-instance or ASP)
7. Other (please specify)
98. Don’t know

QPA2. What are your firm’s plans to implement or expand its use of the following software technologies in the next 12 months? (Select one for each row)

98.	1.	2.	3.	4.	5.	6.
Not interested/ don’t know	Interested/ considering	Piloting	Implementing/ implemented	Expand/upgrade existing implementation	Decreasing	Removing

1. **Enterprise resource planning (ERP) software** (e.g., finance, asset management, risk and compliance)
2. **Human capital management software** (e.g., payroll, HR management, talent management)
3. **Sales force automation (SFA) software** (e.g., sales, mobile sales, telesales, incentive comp)
4. **Marketing automation software** (e.g., campaign management, lead generation, marketing resource management, planning, and branding and awareness)
5. **Customer service and support software** (e.g., customer experience, field service, help desk, eService, and contact center management)
6. **Order management software** (e.g., sell side, e-commerce, partner relationship management, order management)
7. **Product lifecycle management (PLM) software** (e.g., computer-aided design management, other product data management, product development collaboration)
8. **Supply chain management (SCM) software** (e.g., procurement or sourcing software, warehouse management software, transportation management software)
9. **Spend management or supplier relationship management (SRM) software** (e.g., procurement or sourcing software)
10. **Project based solutions (PBS) software** (e.g., project management, service delivery automation, project portfolio management, asset and facility management)
11. **Software that supports an industry specific process** (e.g., point-of-sale software for retailers, reservations systems for airlines)

[ASK ONLY IF QPA2_1 = 2,3,4,5]

QPA3A. In 2009, which vendors’ ERP software is your firm likely to purchase? (Select all that apply)

1. In-house
2. Agresso
3. Compiere
4. Deltek
5. Epicor
6. Exact
7. IFS
8. Infor
9. Lawson
10. Microsoft
11. NetSuite
12. Oracle

13. QAD
14. SAP
15. Sage
16. Syspro
17. WorkDay
18. Other (please specify)
98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA2_2 = 2,3,4,5]

QPA3B. In 2009, which vendors' Human Capital Management software is your firm likely to purchase? (Select all that apply)

1. In-house
2. ADP
3. Kronos
4. Lawson
5. Microsoft
6. Oracle
7. Sage
8. SAP
9. Ultimate Software
10. WorkDay
11. Other (please specify)
98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA2_3= 2,3,4,5]

QPA3C. In 2009, which vendors' Sales Force Automation (SFA) software is your firm likely to purchase? (Select all that apply)

1. In-house
2. Amdocs CRM
3. CDC Software's Saratoga Systems
4. Frontrange Goldmine
5. Maximizer CRM
6. Microsoft Dynamics CRM
7. Netsuite
8. Oracle (Siebel)
9. Oracle CRM On Demand
10. Pivotal CRM
11. RightNow
12. salesforce.com
13. SAP CRM
14. Sugar CRM
15. Other (please specify)
98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA2_4= 2,3,4,5]

QPA3D. In 2009, which vendors' Marketing Automation software is your firm likely to purchase? (Select all that apply)

1. In-house
2. Aprimo
3. Alterian
4. Amdocs CRM
5. Chordiant
6. Infor CRM (Epiphany)
7. Microsoft Dynamics CRM
8. Neolane
9. Oracle (Siebel)
10. Pivotal CRM

- 11. SAP
- 12. SAS
- 13. Teradata
- 14. Unica
- 15. Other (please specify)
- 98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA2_5= 2,3,4,5]

QPA3E. In 2009, which vendors' Customer Service and Support (CSS) software is your firm likely to purchase? (Select all that apply)

- 1. In-house investment
- 2. Amdocs CRM
- 3. ciboodle
- 4. eGain
- 5. Genesys Telecommunications
- 6. InQuira
- 7. KANA Software
- 8. KNOVA
- 9. Microsoft Dynamics CRM
- 10. Oracle CRM on Demand
- 11. Oracle E-Business Suite CRM
- 12. Oracle (Siebel)
- 13. RightNow
- 14. Salesforce.com
- 15. SAP
- 16. SugarCRM
- 17. Sword
- 18. Other (please specify)
- 98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA2_6= 2,3,4,5]

QPA3F. In 2009, which vendors' Order Management software is your firm likely to purchase? (Select all that apply)

- 1. In-house investment
- 2. Amdocs
- 3. Click Commerce
- 4. Epicor
- 5. i2
- 6. Infor ERP LX (BPCS/PRMS)
- 7. Infor ERP LN (Baan)
- 8. Microsoft Dynamics AX
- 9. Microsoft Dynamics GP
- 10. Microsoft Dynamics SL
- 11. Microsoft Dynamics NAV
- 12. Oracle (E-Business Suite)
- 13. Oracle (JD Edwards)
- 14. Oracle (PeopleSoft)
- 15. SAP
- 16. Sterling Commerce (Comergent, Yantra)
- 17. Other (please specify)
- 98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA2_7 = 2,3,4,5]

QPA3G. In 2009, which vendors' Product Lifecycle Management software is your firm likely to purchase? (Select all that apply)

- 1. In-house

2. Arena Solutions
3. Autodesk
4. Dassault Systems (Enovia)
5. IBM PLM
6. IFS
7. Infor (Optiva, PLM 8, or RunTime)
8. Lawson (Freeborders)
9. Oracle (Agile)
10. PTC (Windchill)
11. SAP PLM
12. Siemens PLM (Teamcenter)
13. Other (please specify)
98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA2_8 = 2,3,4,5]

QPA3H. In 2009, which vendors' Supply Chain software is your firm likely to purchase? (Select all that apply)

1. In-house investment
2. Epicor
3. Highjump
4. i2
5. Infor
6. JDA
7. Manhattan Associates
8. Microsoft
9. Oracle EBS
10. Red Prairie
11. SAP
12. Sterling Commerce
13. Other (please specify)
98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA2_9 = 2,3,4,5]

QPA3I. In 2009, which vendors' Spend Management or Supplier Relationship Management software is your firm likely to purchase? (Select all that apply)

1. In-house investment
2. Ariba
3. Oracle EBS
4. PeopleSoft
5. Lawson
6. SAP
7. BasWare
8. Ketera
9. Global eProcure
10. Quadrem
11. Hubwoo
12. IQ Navigator
13. BravoSolution
14. Fieldglass
15. Zycus
16. Other (please specify)
98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA2_10 = 2,3,4,5]

QPA3J. In 2009, which vendors' Project Based Solution software is your firm likely to purchase? (Select all that apply)

1. In-house
2. Agresso

3. CA Clarity
4. Deltek
5. IFS
6. Maconomy
7. Meridian Systems
8. Microsoft Dynamics SL
9. Microsoft Enterprise Project Management
10. NetSuite OpenAir
11. Oracle EBS
12. Oracle Primavera
13. Planview
14. Quick Arrow
15. SAP
16. Tenrox
17. Other (please specify)
98. Don't know [EXCLUSIVE]

QPA4. For each category of software, which database is the primary database that it uses? (Select one for each row)

[PIPE IN EVERY RESPONSE THAT WAS GIVEN A 2,3,4,5 IN QPA2]

1.	2.	3.	4.	98.
DB2	Oracle	SQL Server	Other database	Don't know/NA

1. Enterprise resource planning (ERP) software
2. Human capital management software
3. Sales force automation (SFA) software
4. Marketing automation software
5. Customer service and support software
6. Order management software
7. Product lifecycle management (PLM) software
8. Supply chain management (SCM) software
9. Spend management or supplier relationship management (SRM) software
10. Project based solutions (PBS) software

QPA5. What are your firm's plans to implement or expand your use of the following information and knowledge management software technologies in the next 12 months?

98.	1.	2.	3.	4.	5.	6.
Not interested/ don't know	Interested/ considering	Piloting	Implementing/ implemented	Expand/upgrade existing implementation	Decreasing	Removing

[ROTATE]

1. **Business Intelligence software** (BI)
2. **Collaboration software** (e.g., email, calendaring, contacts, instant messaging, Web conferencing, team collaboration, Web 2.0)
3. **Content management software** (e.g., Web content management, document management, records management, content and email archiving,
4. **Master data management software** (e.g., customer hubs, customer data integration, product information master, financial hubs, etc.)
5. **Knowledge management:** Implicit and explicit knowledge capture and delivery (e.g., data and information in the firm's databases with customer information, transactions data, etc required by customer service agents or self-service applications)

[ASK ONLY IF QPA5_2 = 2,3,4,5]

QPA5B. In 2009, which vendors' Collaboration software is your firm likely to purchase? (Select all that apply)

1. Google

- 2. IBM
- 3. Microsoft
- 4. Novell
- 5. Oracle
- 6. Other (please specify)
- 98. Don't know [EXCLUSIVE]

[ASK ONLY IF QPA5_3 =2,3,4,5]

QPA5C. In 2009, which vendors' Content Management software is your firm likely to purchase? (Select all that apply)

- 1. EMC
- 2. Hyland Software
- 3. IBM
- 4. Interwoven
- 5. Microsoft
- 6. Novell
- 7. Oracle
- 8. Open Text
- 9. Vignette
- 10. Other (please specify)
- 98. Don't know [EXCLUSIVE]

QPA6. What are your firm's plans to implement or expand your use software-as-a-service (SaaS) in the next 12 months? (Select one)

(SaaS is an application which you don't own, it is hosted remotely, and a monthly usage fee is paid)

98.	1.	2.	3.	4.	5.	6.
Not interested/ don't know	Interested/ considering	Piloting	Implementing/ implemented	Expand/upgrade existing implementation	Decreasing	Removing

[ASK ONLY IF QPA6 = 98 "NOT INTERESTED"]

QPA6A. Why aren't you interested in software-as-a-service? (Select all that apply)

[ROTATE]

- 1. We're locked in with our current vendor
- 2. Total cost concerns (i.e., total cost of ownership)
- 3. Complicated pricing models
- 4. Application performance (i.e., downtime, speed)
- 5. Security concerns
- 6. Integration issues
- 7. Lack of customization
- 8. We can't find the specific application we need
- 9. Other reason (please specify)

[ASK ONLY IF QPA6 = 2,3,4,5]

QPA6B. How important were the following in your firm's decision to adopt Software-as-a-Service (SaaS)?

1.	2.	3.	4.	5.	98.
Not at all important				Very Important	Don't know / Does not apply to me

[ROTATE]

- 1. Ability to substitute upfront costs with regular monthly payments
- 2. Lower overall costs
- 3. Speed of implementation and deployment

4. Gaining a feature or functionality that is not available in a traditional, licensed software package
5. Lack of in-house IT staff to maintain a traditional software solution
6. To support a large number of mobile and remote users

[ASK ONLY IF QPA6 = 2,3,4,5]

QPA6C. For which of the following software applications is your firm using Software-as-a-Service (SaaS)? (Select all that apply)

[ROTATE]

1. **Enterprise resource planning (ERP) software** (e.g., finance, asset management, risk and compliance)
2. **Human capital management software** (e.g., payroll, HR management, talent management)
3. **Sales force automation (SFA) software** (e.g., sales, mobile sales, telesales, incentive comp)
4. **Marketing automation software** (e.g., campaign management, lead generation, marketing resource management, planning, and branding and awareness)
5. **Customer service and support software** (e.g., customer experience, field service, help desk, eService, and contact center management)
6. **Order management software** (e.g., sell side, e-commerce, partner relationship management, order management)
7. **Product lifecycle management (PLM) software** (e.g., computer-aided design management, other product data management, product development collaboration)
8. **Supply chain management (SCM) software** (e.g., procurement or sourcing software, warehouse management software, transportation management software)
9. **Spend management or supplier relationship management (SCM) software** (e.g., procurement or sourcing software)
10. **Project based solutions (PBS) software** (e.g., project management, service delivery automation, project portfolio management, asset and facility management)
11. **Collaboration software** (e.g., email, team workspace, instant messaging, and Web conferencing)
12. **Content management software** (e.g., Web content management, document management, records management, content and email archiving, and document imaging)
13. **Web 2.0 technologies such as blogs, wikis, and RSS**
14. **Software that supports an industry specific process** (e.g., point-of-sale software for retailers, reservations systems for airlines) **(please specify) [FIX THIS SECOND TO LAST]**
15. **Other software (please specify) [FIX THIS LAST]**
98. **Don't know [EXCLUSIVE]**

Platform and Infrastructure Software [ask to those who selected QS3_3 platform software]

QPI1. Now we'd like to ask you about Platform and Infrastructure Software.

How important are each of the following software initiatives in the next 12 months? (Select one for each row)

SaaS is an application which you don't own, it is hosted remotely, and a monthly usage fee is paid
SOA is a method of conceptualizing, designing, and building applications by assembling reusable building blocks, each of which is usually represented as a service.

1.	2.	3.	4.	5.	98.
Not at all important				Very important	Don't know / Does not apply to me

1. Adopt Software-as-a-Service (SaaS) for infrastructure or platform software
2. Standardize on a middleware platform
3. Adopt service-oriented architecture (SOA)
4. Use database-as-a-service providers such as SQL Server Data Services

QPI2. What are your firm's plans to implement or expand its use of the following types of platform and infrastructure software in the next 12 months? (Select one for each row)

98.	1.	2.	3.	4.	5.	6.
Not interested/ don't know	Interested/ considering	Piloting	Implementing/ implemented	Expand/upgrade existing implementation	Decreasing	Removing

[ROTATE]

1. Database software
2. Portal server software
3. Enterprise content management (ECM) software
4. Enterprise collaboration platform
5. Master data management (MDM) software
6. Enterprise Application integration software
7. Enterprise Software Bus (ESB) (the messaging backbone that carries messages from one application to another)
8. Application servers and platform software
9. SOA registry-repository and/or SOA service lifecycle management
10. SOA and Web services management
11. SOA appliances and XML gateway appliances
12. Business Process Management Software (BPM)

[ASK ONLY IF QPI2_3 = 2,3,4,5.]

QPI2A. In 2009, which types of enterprise content management (ECM) software is your firm likely to purchase? (Select all that apply)

1. Enterprise content management platform
2. Document management
3. Records management
4. Web content management
5. Document imaging
6. Content and email archiving
7. Digital asset management
8. Other (please specify)
98. Don't know **[EXCLUSIVE]**

[ASK ONLY IF QPI2_4 = 2,3,4,5]

QPI2B. In 2009, which types of collaboration software is your firm likely to purchase? (Select all that apply)

1. **Messaging** (e.g., email, calendaring and scheduling, contacts)
2. **Team collaboration** (e.g., document repository, team workspace, basic library services, ad hoc workflow, basic project management, discussion threads)
3. **Real-time collaboration and communications** (e.g., instant messaging, presence awareness, Web conferencing, voice, audio and video conferencing, Web conferencing)
4. **Web 2.0** (e.g., blogs, wikis, syndication, tagging, shared bookmarks)
5. **Other** (please specify)
98. **Don't know** [EXCLUSIVE]

QPI3. Where are your firm's Web-based applications hosted? (Select all that apply)

1. The corporate IT organization runs them internally
2. A special Web operations organization outside of IT runs them internally
3. Run on physical servers at a hoster or managed hoster with standard contracts
4. Run on virtual servers at a pay-per-use "cloud-style" service provider
5. Don't know [EXCLUSIVE]
6. Don't have web-based applications [EXCLUSIVE]

QPI4. Which of the following best describes your firm's approach to, or use of, business process management (BPM)? (Select one)

BPM refers to the designing, executing and optimization of cross-functional business processes that include people, applications and business partners.

1. Not pursuing, and no immediate plans to do so [SKIP TO THE NEXT SECTION.]
2. Will pursue within 12 months
3. We use selectively, without a clear strategy
4. We use with an enterprise-level strategy and commitment for BPM
5. Don't know [SKIP TO THE NEXT SECTION.]

[ASK ONLY IF QPI4 = 2 (WILL PURSUE), 3 (USE SELECTIVELY), OR 4 (USE STRATEGICALLY)]

QPI4A. Which of the following have been major drivers for BPM adoption? (Select all that apply)

[ROTATE]

1. Increased productivity for process workers
2. The ability to provide real-time visibility into key processes
3. The ability to change processes quickly and easily
4. The ability to model business processes
5. Optimization of processes
6. Ensure consistent process execution across divisional or geographic boundaries
7. Support for compliance efforts
8. Other (please specify)
98. Don't know

[ASK ONLY IF QPI4 =3 (USE SELECTIVELY) OR 4 (USE STRATEGICALLY)."]

QPI4B. How do you expect your firm's BPM usage to change in the next 12 months? (Select one)

1. Decrease overall
2. Remain the same
3. Increase overall
4. Don't know

[ASK ONLY IF QPI4 =3 (USE SELECTIVELY) OR 4 (USE STRATEGICALLY)."]

QPI4C. Which vendors do you currently use for Business Process Management software? (Select all that apply)

1. Appian
2. Cordys
3. EMC

4. Fujitsu
5. Global 360
6. HandySoft
7. IBM/FileNet
7. IBM/WebSphere
8. Lombardi
9. MetaStorm
10. Microsoft
11. Oracle
12. PegaSystems
13. SAP
14. Savvion
15. Software AG
16. Sterling Commerce
17. Sun Microsystems
18. TIBCO
19. Vitria
20. Ultimus
21. Other (please specify)
98. Don't know

Custom Software Development [ask of who selected QS3_4 "custom software development"]

QSD1. Now we'd like to ask you about Custom Software Development.

For custom-developed applications, which development platforms does your firm use? (Select all that apply)

- 1. Microsoft .NET
- 2. Java, Java EE, J2EE
- 3. Open source frameworks like Spring or Hibernate
- 4. Proprietary 4GLs (e.g., Cold Fusion, Magic Software, PowerBuilder, etc.)
- 5. Rich interface in a browser (e.g., AJAX, Flash or Flex, etc.)
- 6. Mainframe or midrange platforms (e.g., IBM mainframes, Unisys mainframes, AS/400, iSeries, NonStop, VMS, etc.)
- 7. Lightweight Web Frameworks (e.g., Ruby on Rails, Zend Framework, Cake PHP)
- 8. Other (please specify)
- 98. Don't know

QSD2. For custom-developed applications, which languages does your firm use for development or maintenance? (Select all that apply)

- 1. Microsoft Visual Basic.NET
- 2. Microsoft C#
- 3. Java
- 4. JavaScript
- 5. Actions Script/MXML
- 6. Server scripting languages (Perl, PHP, Python, Ruby, etc.)
- 7. Proprietary 4GL development tools (Cold Fusion, Magic Software, PowerBuilder, etc.)
- 8. COBOL
- 9. BPEL
- 10. Other (please specify)
- 98. Don't know

QSD2A. Where will your firm develop and test custom-developed applications? (Select all that apply)

- 1. On physical servers in internal IT operations
- 2. On virtual servers in internal IT operations
- 3. On physical servers at a traditional hoster or managed service provider
- 4. On virtual servers or environments at a pay-per-use "cloud-style" service provider
- 5. Other (please specify)
- 98. Don't know

QSD2B. Where will your firm deploy custom-developed applications? (Select all that apply)

- 1. On physical servers in internal IT operations
- 2. On virtual servers in internal IT operations
- 3. On physical servers at a traditional hoster or managed service provider
- 4. On virtual servers or environments at a pay-per-use "cloud-style" service provider
- 5. Other (please specify)
- 98. Don't know

QSD3. Is software modeling used in your firm? (Select one)

- 1. Yes
- 2. No
- 98. Don't know

[ASK ONLY IF QSD3 RESPONSE IS "YES"]

QSD3a. Please describe your firm's usage of software modeling.

1.	2.	98.
----	----	-----

Yes	No	Don't know
-----	----	------------

1. Is it used in corporate IT?
2. Is it used in business units?
3. Is it used to drive automated code development from the models?
4. Is it used to improve communication among stakeholders?

[ASK ONLY IF QSD3 RESPONSE IS "YES"]

QSD3B. What modeling notation does your firm use? (Select all that apply)

1. Proprietary
2. BPEL
3. BPMN
4. UML
5. Other (please specify)
98. Don't know **[EXCLUSIVE]**

[ASK ONLY IF QSD3 RESPONSE IS "YES"]

QSD3C. How has your firm's use of modeling changed in the past 2 years? (Select one)

1. Increased significantly
2. Increased somewhat
3. Stayed about the same
4. Decreased somewhat
5. Decreased significantly
98. Don't know

QSD4. Who is your firm's primary integrated development environment (IDE) provider? (Select one)

1. Eclipse
2. Embacadero (Codegear) Software
3. IBM
4. Microsoft
5. Oracle (includes BEA)
6. SAP
7. Sun Microsystems
8. Sybase
9. Other (Please specify)
98. Don't know

QSD5. What types of new custom applications are your firm's developers building? (Select all that apply)

[ROTATE]

1. Terminal based host applications
2. Client-server applications
3. Web applications
4. SharePoint applications
5. SOAP or REST based Web services
6. Rich Internet Applications
7. Mobile Applications
8. Commercial "shrink-wrap" software products
9. Developing high volume, high performance transactional applications
10. Other (please specify)
98. Don't know **[EXCLUSIVE]**

Sources & Influence Section (all respondents)

QS11. Lastly, we'd like to ask you a few short questions about how you get information.

When researching and comparing software products, how important are each of the following offline media as sources of information for informing your purchase decisions?

1.	2.	3.	4.	5.
Not at all important / Don't use				Very Important

[ROTATE]

1. Peers and colleagues (word of mouth)
2. Technology or business publications, magazines
3. Industry events, trade shows, or conferences
4. Industry analyst firms
5. Consultants, value-added resellers (VARs), or systems integrators (SIs)
6. Your direct vendor salesperson
7. TV, radio, print, or direct mail
8. Other offline source, if applicable (please specify)

QS12. When researching and comparing software products, how important are each of the following online media as sources of information for informing your purchase decisions?

1.	2.	3.	4.	5.
Not at all important / Don't use				Very Important

[ROTATE]

1. Technology or business publication/ magazine Web sites
2. Vendor, industry trade, or professional Web sites
3. Blogs from vendors, peers, or industry commentators
4. Email or electronic newsletters
5. Web-based events or webinars
6. Interactive media: podcasts, video, online demos, rich internet apps
7. Discussion forums, online communities, or social network sites
8. Other online source, if applicable (please specify)

QS13. Which of the following sources of information (Internet or print) do you refer to when making enterprise-wide software purchase decisions for your firm? (Select all that apply)

1. Business 2.0
2. Business Week
3. CFO
4. CIO
5. Computerwoche
6. Computerworld
7. CSO Magazine
8. CT/Heise Online
9. eWeek
10. Fast Company
11. Forbes
12. Fortune
13. Information Security Magazine
14. InformationWeek
15. KES
16. Network World
17. SC Magazine
18. Tech Target

- 19. The Economist
- 20. The Wall Street Journal
- 21. Wired
- 22. Other newspaper/magazine (please specify)
- 23. A blog (please specify)
- 24. Other Web site (please specify)
- 98. None/Don't know

QS14. Which OFFLINE media or information source BEST helps you do the following? (Select one for each row)

[ROTATE COLUMNS, BUT FIX THE "OTHER" COLUMN IN THE LAST PLACE]

1.	2.	3.	4.	5.	6.	7.	8.
Peers and colleagues (word of mouth)	Technology or business publications, magazines	Industry events, trade shows, or conferences	Industry analyst firms	Consultants, value added resellers VARs, or systems integrators	Your direct vendor salesperson	TV, radio, print, or direct mail advertising	Other offline source

[ROTATE]

- 1. Provides me with the latest information about my business and/or industry
- 2. Helps me become aware of new products or services
- 3. Provides information that I can trust
- 4. Helps me find the best companies to buy from
- 5. Keeps me ahead of the competition
- 6. Helps me improve or grow my firm's business opportunities
- 7. Helps me advance my career

QS15. Which ONLINE media or information source BEST helps you do the following? (Select one for each row)

[ROTATE COLUMNS, BUT FIX THE "OTHER" COLUMN IN THE LAST PLACE]

1.	2.	3.	4.	5.	6.	7.	8.
Technology or business publication/magazine Web sites	Vendor, industry trade, or professional Web sites	Blogs from vendors, peers, or industry commentators	Email or electronic newsletters	Web-based events or webinars	Interactive media: podcasts, video, online demos, rich internet apps	Discussion forums, online communities social network sites	Other online source

[ROTATE]

- 1. Provides me with the latest information about my business and/or industry
- 2. Helps me become aware of new products or services
- 3. Provides information that I can trust
- 4. Helps me find the best companies to buy from
- 5. Keeps me ahead of the competition
- 6. Helps me improve or grow my firm's business opportunities
- 7. Helps me advance my career