Eclipse Community Survey Results

October 26, 2007

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IDC

Organization of This Slide Deck

This deck is quite lengthy. Highlights and overall observations have been summarized at the front of the deck. Readers should start with the summary slides, and then look to the detailed slides for more specific data and commentary.

The major sections of this deck follow:

- Survey objective and methodology
- Summary observations
- Respondent demographics
- Questions applicable to individuals
- Questions applicable to organizations

An index of the slides in this deck is included at the end of the slide deck, for your reference.

Survey Objective

IDC, in conjunction with the Eclipse Foundation, conducted a survey of Eclipse.org community participants in order to better understand:

- the usage of Eclipse open source project software,
- the characteristics of the users of this software, and
- the business models of companies looking to make money from their usage of Eclipse.

Survey Methodology

IDC and the Eclipse Foundation jointly developed an online survey of Eclipse community participants. The survey was promoted on the Eclipse.org website, and was open to respondents Aug. 16 to Sep. 9, 2007. A total of 1014 responses were received.

- Scope: worldwide. Survey was executed in English only, which biased the responses to English speaking users of Eclipse. Other than that, we believe the sample is random, and is representative of the English-speaking Eclipse community at large.
- Individual versus organization: some questions are oriented to individual activities and opinions, while others are oriented to organizational activities (if applicable – some respondents do not work in an organization). For the organization-oriented questions, IDC eliminated multiple responses from the same organization, using the organization's URL to uniquely identify each organization, where it was provided by a respondent. If no URL was provided, IDC assumed the organization is unique.
- IDC collected the responses and produced this aggregate analysis for general consumption. Questions should be directed to Matt Lawton at IDC (mlawton@idc.com).

Summary Observations

- Eclipse community is “business-oriented”
  - 91% employed by an organization or self-employed
  - 71% of employed by org. are IT solution providers vs. 29% end users
  - 84% of respondents use Eclipse for work-related reasons
  - 64% of unique organizations/respondents use Eclipse to make money or to save money
- Respondents are experienced with Eclipse
  - Over half (56%) have used Eclipse more than 3 years
- Top 5 most used Eclipse projects:
  - Java Development Tools (JDT) – 88% of respondents
  - Web Tools Project – Web Standard Tools – 54% of respondents
  - Web Tools Project – J2EE Standard Tools – 44% or respondents
  - Eclipse Rich Client Platform (RCP) – 42% of respondents
  - Eclipse Modeling Framework (EMF) – 37% of respondents

Summary Observations (cont.)

IDC Analyze the Future

- Experience using Eclipse makes a big difference:

With more experience, comes …	Examples: (proportion of respondents with the following experience)	
	Less than 1 year	**More than 3 years**
Higher likelihood to use Eclipse for work related reasons	73% use Eclipse for work related reasons	89% use Eclipse for work related reasons
Higher project usage	72% use Java Development Tools	94% use Java Development Tools
More “mainstream” target applications	51% developing server-centric apps	76% developing server-centric apps
Fewer “emerging” target applications	29% developing embedded software	12% developing embedded software
Higher likelihood to use more Eclipse-based products or plug-ins from other sources	25% use 4 or more from other sources	59% use 4 or more from other sources
More participation in the Eclipse community	20% participate	52% participate
More appreciation by the community	47% felt appreciated by the project	81% felt appreciated by the project

Summary Observations (cont.)

- Server-centric applications the most popular and most mature software built using Eclipse
  - 72% of all respondents are building server-centric applications
  - 2.3 applications deployed (i.e. in next release or support) for every 1 in development (i.e. in first release)
- Respondents are active in Eclipse community
  - 42% do more than just use Eclipse
  - Most common community activity is entering bugs – 37% of respondents
  - Least common, not surprisingly, is submitting code – 7% of respondents
  - Most active groups are self-employed and IT solution providers
  - Most common reason for not participating more: lack of time (77% of respondents)
- Asia Pacific respondents are not as active in the community*
  - They have more time to use Eclipse than average, but more find it too difficult to use than average
  - Less experienced using Eclipse (just 38% have 4+ years)
  - No Eclipse committers are from Asia Pacific (in this sample)
  - More generally, 65% use OSS but do not contribute to an OSS project community

*subject to the English language bias of the survey. Results may differ if surveying respondents in their local language.

Summary Observations (cont.)

- North America is the locus of Eclipse project development
  - 37 respondents from North America commit code (13% of North American respondents)
  - Next highest is Western Europe with 14 respondents who are committers (4% of Western European respondents)
- Satisfaction ratings quite reasonable overall for Eclipse services
  - Highest rated service: CVS/SVN at 3.92
  - Lowest rated service: Wiki at 3.41
  - (1 = very dissatisfied, 3 = neither satisfied nor dissatisfied, 5 = very satisfied)
- Wide range of usefulness for Eclipse services
  - Highest rated source: Search Engines (e.g. Google) at 4.09
  - Lowest rated source: Eclipse search at 3.05
  - (1 = useless, 3 = neither useless nor useful, 5 = very useful)
- Windows and Linux dominate as operating system platforms of choice
  - 74% use Windows as the primary *development* platform, 20% use Linux
  - 47% use Windows as the primary *deployment* platform, 37% use Linux

Summary Observations (cont.)

- High proportion of respondents motivated by opportunity to make money
  - 25% of unique organizations/respondents use Eclipse for this reason (versus just 2% of OpenOffice.org community, for example)
  - Almost half (46%) of self-employed respondents motivated by opportunity to make money
  - Of those respondents motivated by making money, the average percentage of their total revenue that is from Eclipse-built apps is 46%
  - Most popular business model is to build proprietary apps for sale, but several other models are in use
- Healthy future in place for Eclipse usage
  - 57% of unique organizations/respondents plan to increase their usage, 40% plan to maintain their usage in the next year

A Note on the Selection of Detailed Slides

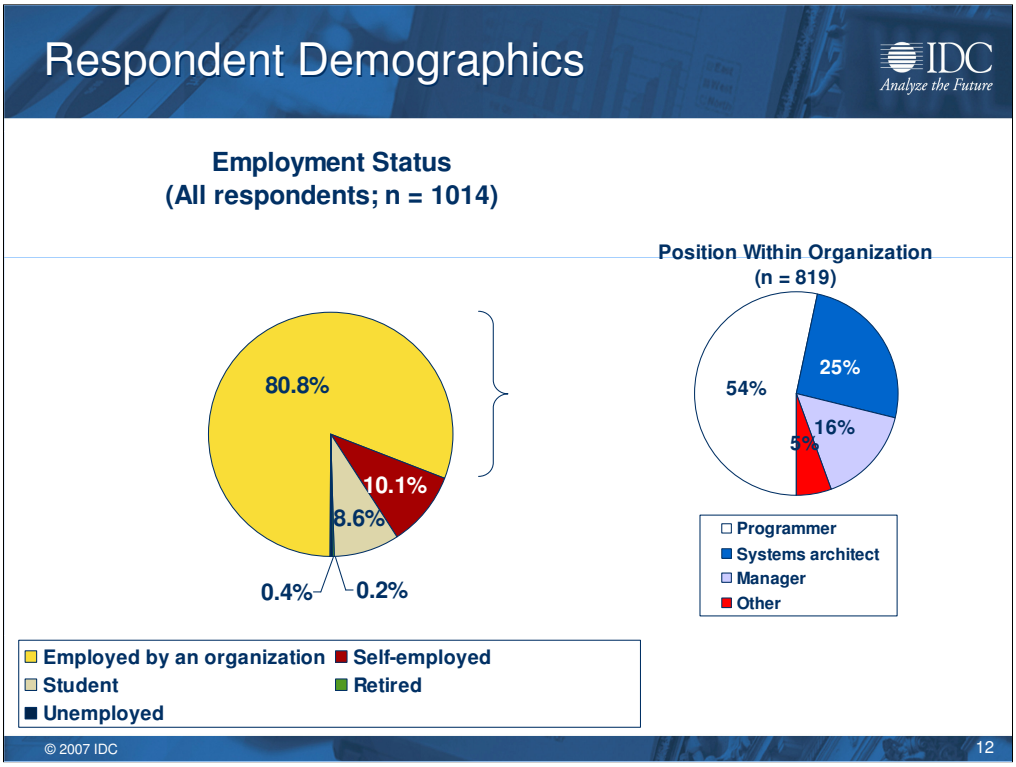
Detailed slides have been chosen for inclusion in this deck primarily based on 2 criteria:

- The slide reports sample-wide results of a specific question asked in the survey, or
- The slide reports a segmented view of the responses to a question, where there is a statistically significant difference amongst two or more of the segment categories.

If a segmented view of the response to a particular question does not appear in this deck, it is because there was not a meaningful difference in the responses across the different segment categories.

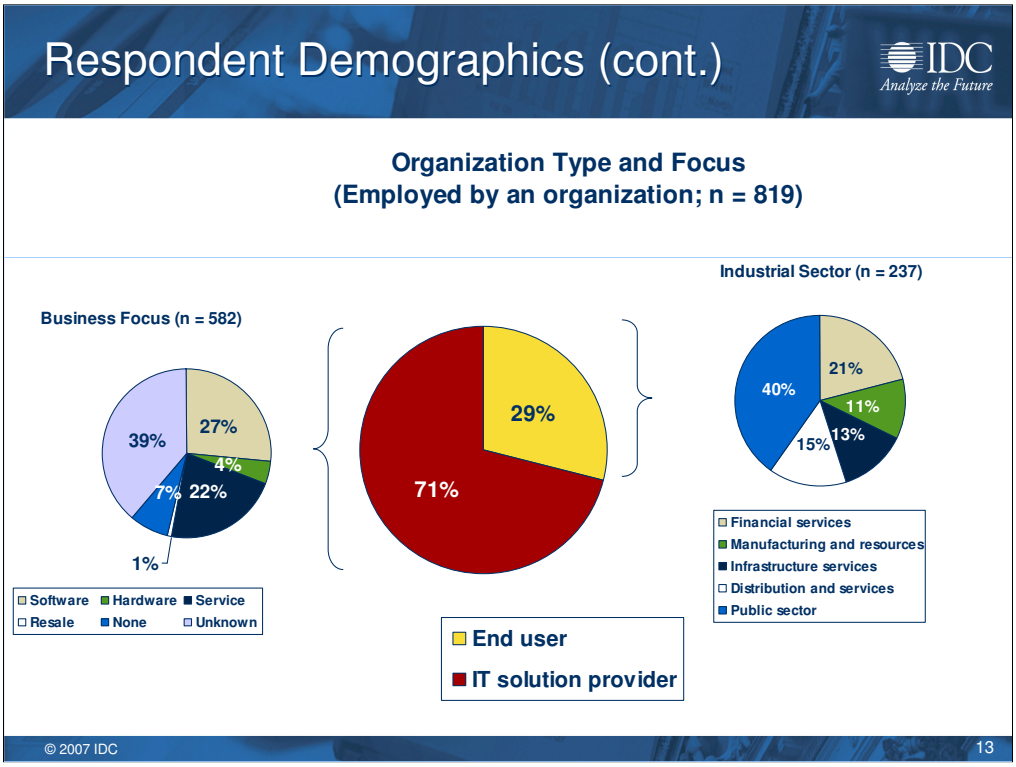
The segments we analyzed are: employment status, organization type, organization size, respondent position within an organization, region, respondent's experience with Eclipse, and the business focus specifically of IT solution providers.

Respondent Demographics



The majority of respondents are employed by an organization (81%), with another 10% self-employed. This suggests that the Eclipse community is a very business-oriented community. As a comparison point, the OpenOffice.org community is a more diverse community: 54% are employed by an organization, 25% are self-employed, while 21% are not employed (i.e. students, retired, unemployed, etc.) whereas just 9% of the Eclipse community respondents are not employed.

Of the respondents employed at an organization, most respondents are either programmers (54%), systems architects (25%), or managers of some sort, e.g. IT manager, CTO, CEO, etc. (16%).



Of the respondents employed by an organization, over two thirds (71%) are providers of IT, while 29% are consumers of it (end users). End users are further subdivided by industrial sector, while IT solutions providers are subdivided by their primary business focus.

End users show a reasonable distribution across five major industrial sectors, with the highest proportion (40%) in the public sector (i.e. all levels of government, education, healthcare services).

Business focus is defined as wherever the maximum percentage of total revenue occurs across 4 types of revenue:

•Software products developed by the organization (including license, maintenance, and subscription/other software revenue)

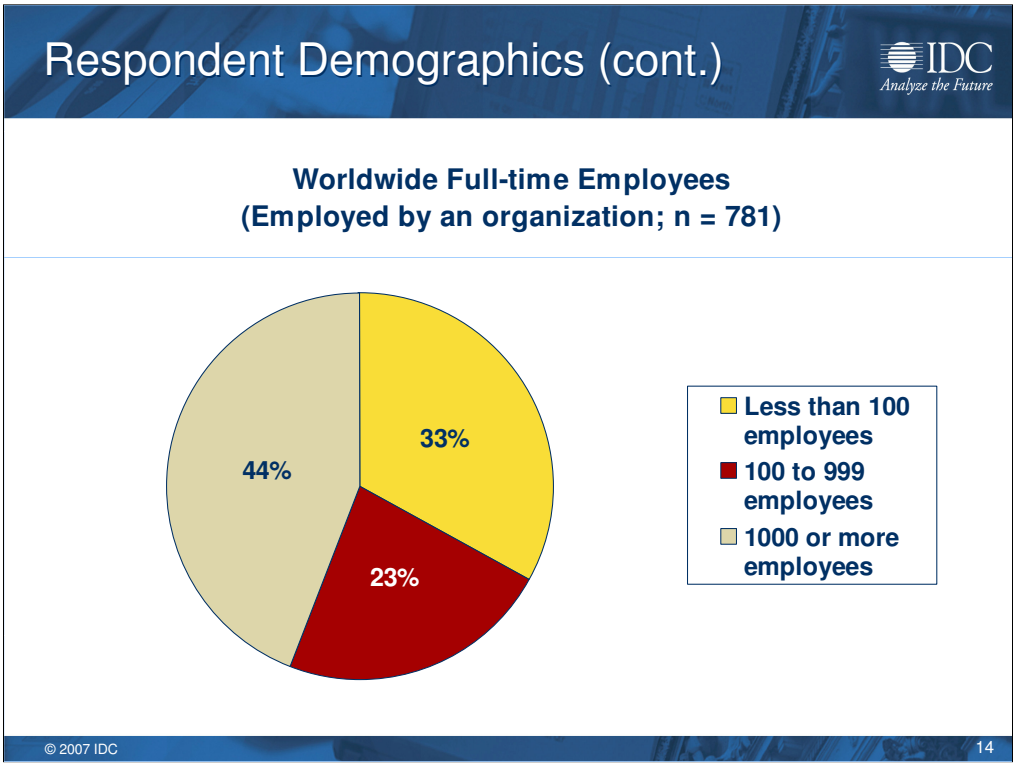
•Hardware products manufactured by the organization

•Services delivered by the organization (including consulting, custom programming, integration, implementation, training)

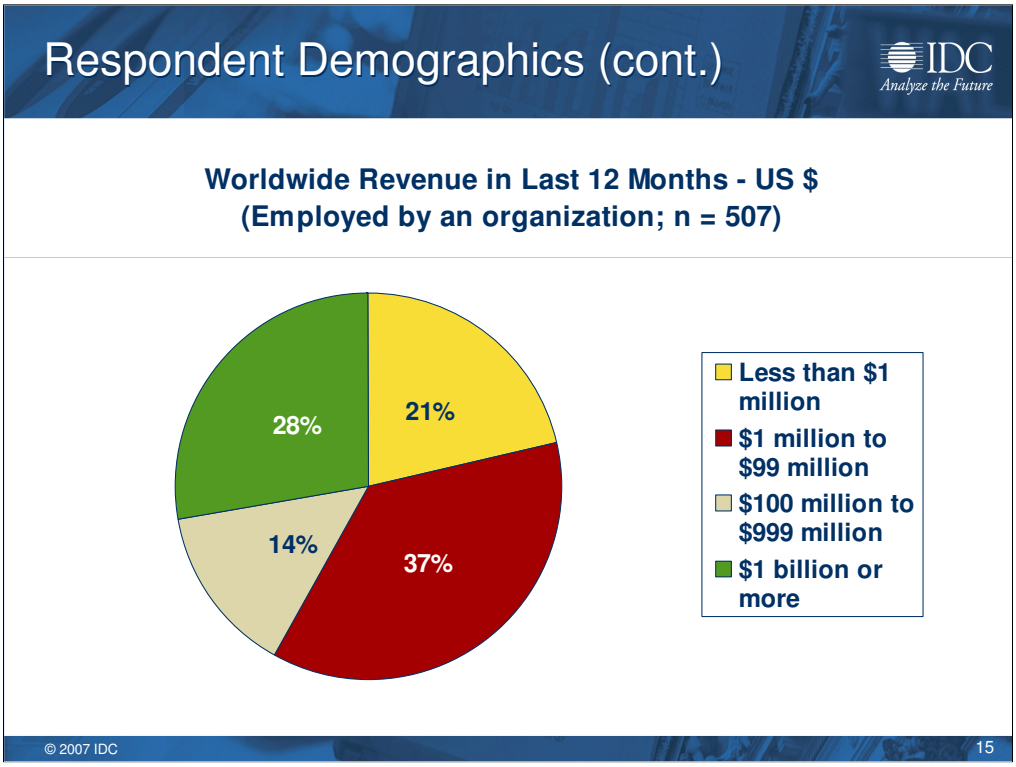
•Resale of third-party products and services

If there is a tie between two or more types of revenue, the business focus is “None”, and if the respondent did not know the percentage of revenue for the four types above, the business focus is “Unknown”.

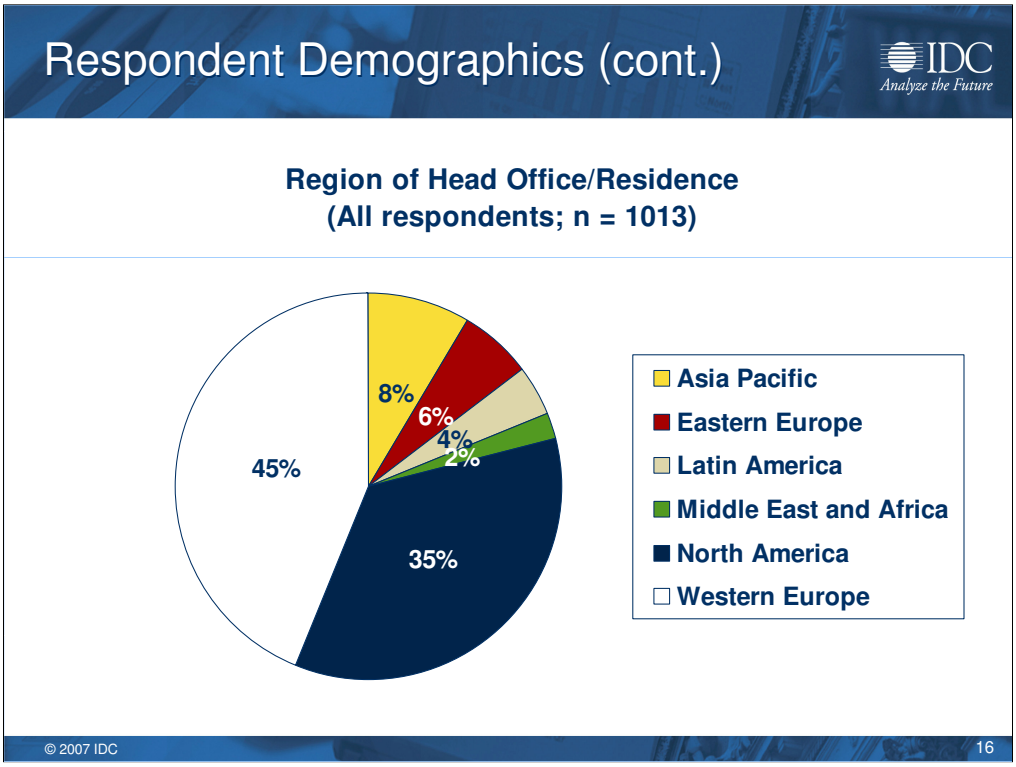
Unfortunately, a large portion of respondents (39%) did not know the revenue splits across the four types of revenue. For those who did know, we see that there are two main groups: those focused on software (27%), and those focused on services (22%). This is no surprise, and we expect that we would see a similar breakout of the “Unknown” respondents if we could find out their revenue splits. Very few resale-focused businesses are part of the Eclipse community – again, this is no surprise, as these companies typically would not undertake much software development, if any.



Again, looking at respondents employed by an organization, we see a relatively high percentage (44%) of respondents from large organizations (1000 or more employees). Even when we have eliminated respondents from the same organization, we still see a high percentage of large organizations (41%). This is much higher than the general population of companies (where there is a much lower percentage of large companies in favor of small companies).



The distribution of respondents within an organization by the total revenue of the organization also reflects a high proportion of large revenue companies. Note that many respondents did not know or could not provide the total revenue for their organizations (the total sample size of respondents who provided total revenue is 507, while the corresponding sample size of respondents who provided the number of employees is 781). For this reason, and also because in the past we have found that respondents provide more accurate estimates of the number of employees than they do of the total revenue, we have used the number of employees as the metric to gauge organization size for segmentation purposes.



This chart shows the distribution of the location of the respondents' organization head offices, where applicable, or the respondents' region of residence, for those respondents who are not employed by an organization.

The largest region represented in this survey sample is Western Europe, followed by North America, but we also have participation by respondents from all regions of the world, including the Middle East and Africa.

Questions Applicable to Individuals

(as opposed to organizations)

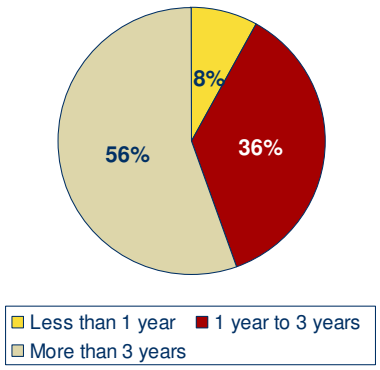
In this section, all respondents have been included, even if they are from the same organization. The total eligible respondent count is 1014.

Familiarity with Eclipse

IDC Analyze the Future

Q11. How long have you been using Eclipse as part of your job or personal usage?

All Respondents (n = 1011)



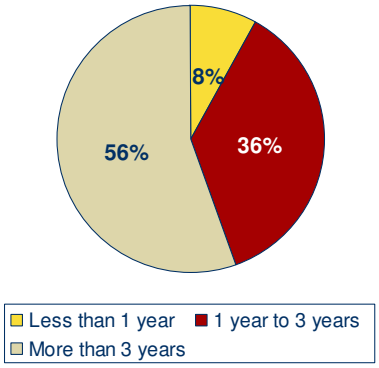
Overall, respondents are quite experienced using Eclipse.

Familiarity with Eclipse (cont.)

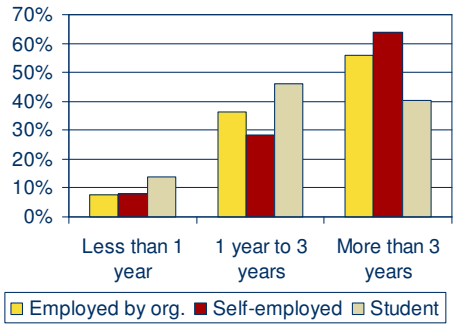
IDC Analyze the Future

Q11. How long have you been using Eclipse as part of your job or personal usage?

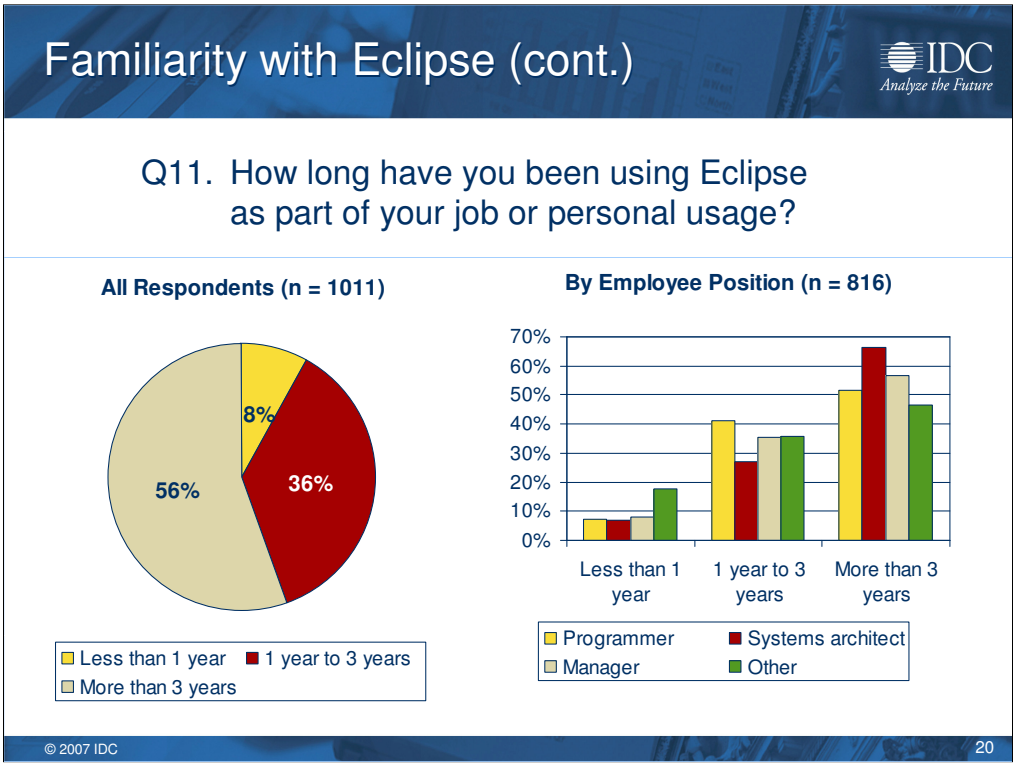
All Respondents (n = 1011)



By Employment Status (n = 1005)



Students have less experience using Eclipse (just 40% have used Eclipse for more than 3 years, versus 56% to 64% for the employed).

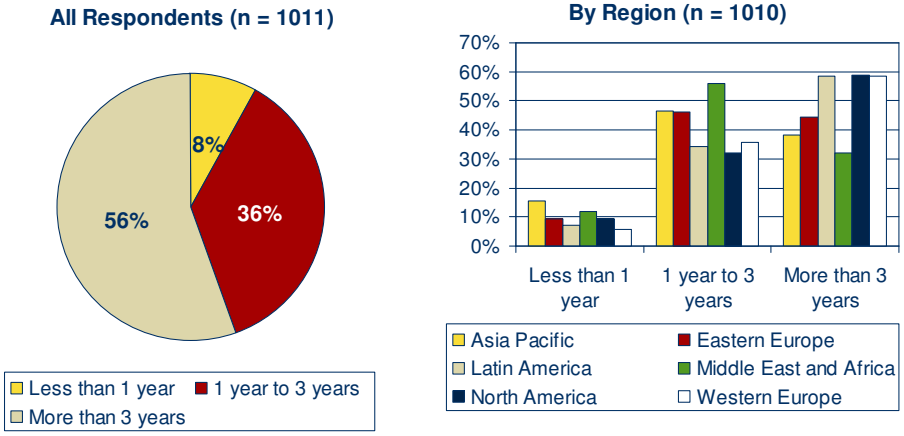


Of those respondents employed by an organization, the most common roles of programmers, systems architects, and managers are most likely to have at least 1 year of experience with Eclipse. More programmers tend to have 1 to 3 years of experience relative to the others, while more system architects tend to have the most experience (i.e. more than 3 years) relative to the others.

Familiarity with Eclipse (cont.)

IDC Analyze the Future

Q11. How long have you been using Eclipse as part of your job or personal usage?

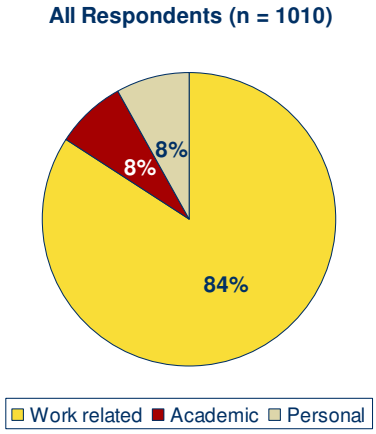


Respondents from Asia Pacific tend to have less experience using Eclipse (16% have less than 1 year experience), while respondents from North America, Western Europe, and Latin America tend to have the most experience (58% to 59% have more than 3 years experience).

Main Reason for Using Eclipse

IDC Analyze the Future

Q12. What best describes the main reason you currently use Eclipse?



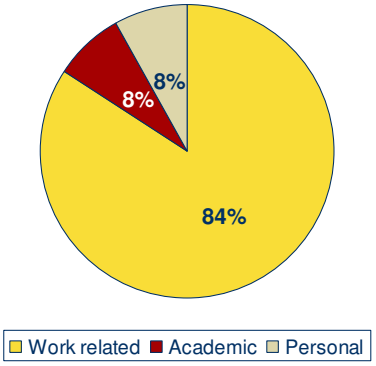
The vast majority of respondents use Eclipse for work related purposes.

Main Reason for Using Eclipse (cont.)

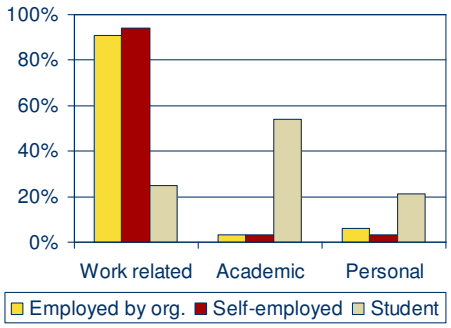
IDC Analyze the Future

Q12. What best describes the main reason you currently use Eclipse?

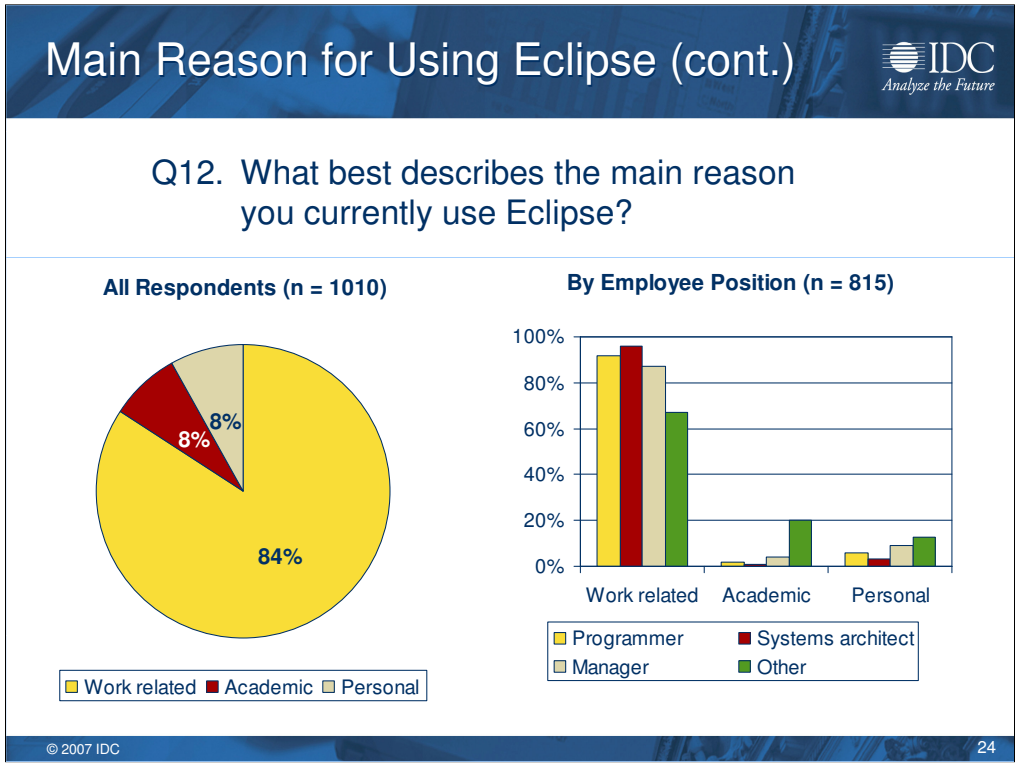
All Respondents (n = 1010)



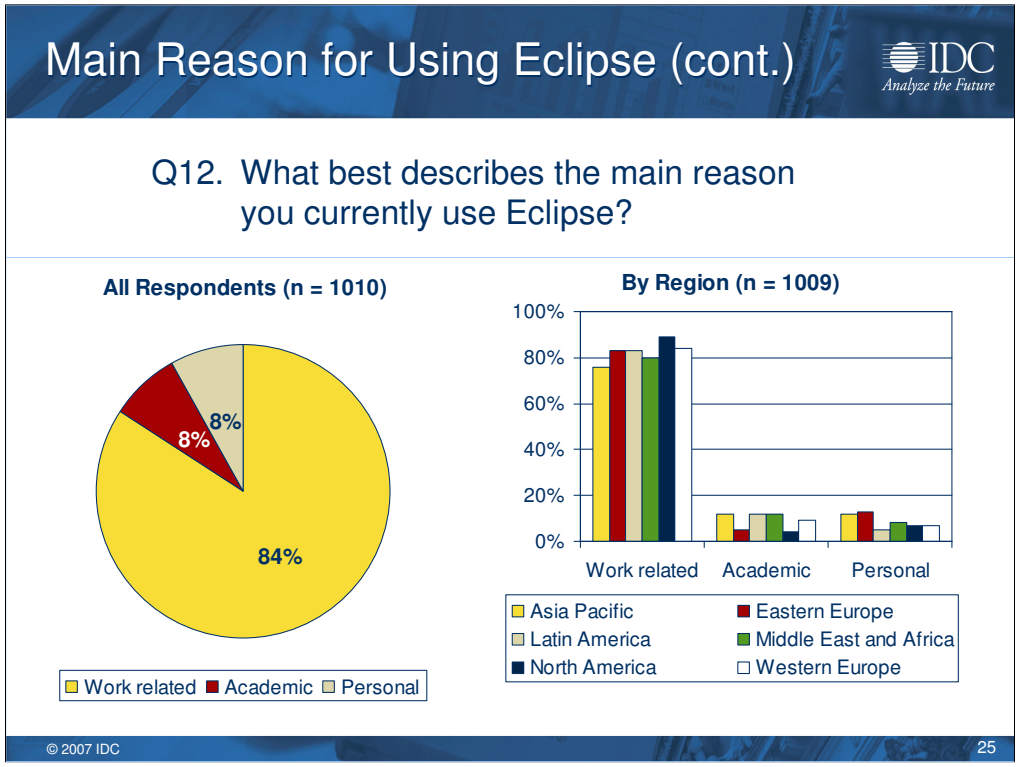
By Employment Status (n = 1004)



Naturally, students are much more inclined to use Eclipse for academic or personal reasons then employed respondents.



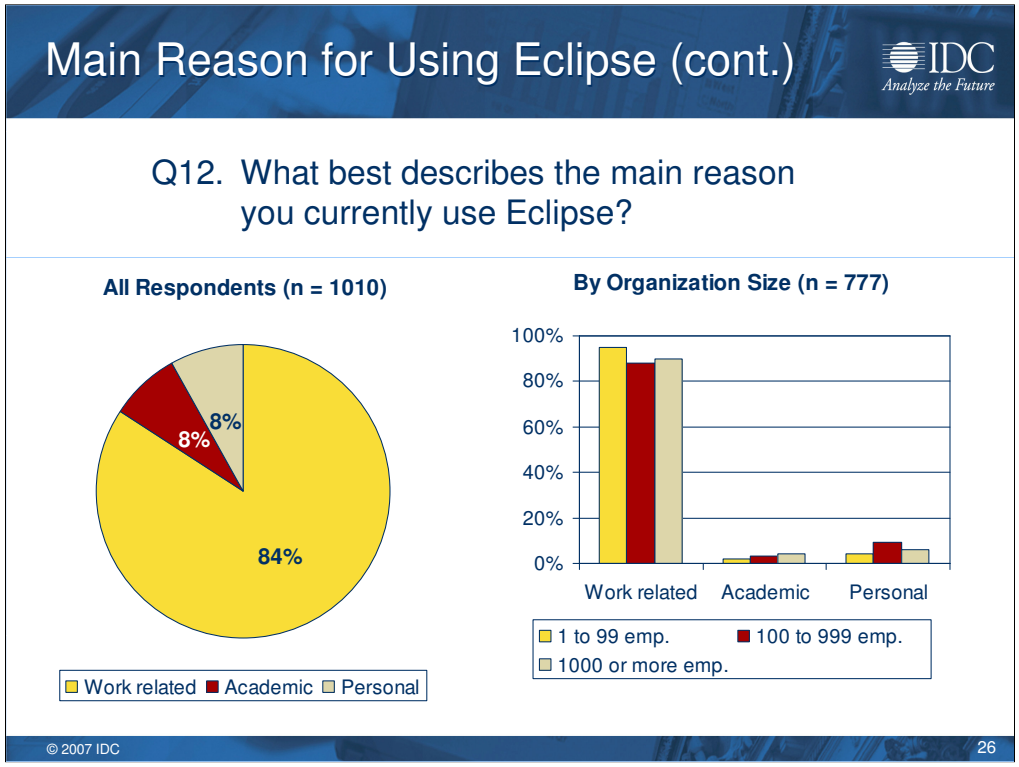
Of those respondents employed by an organization, people occupying the three most common positions are all primarily focused on using Eclipse for their work. Note: personal usage may include people trying out Eclipse on their own time, with a portion transitioning their personal usage into work related usage over time.



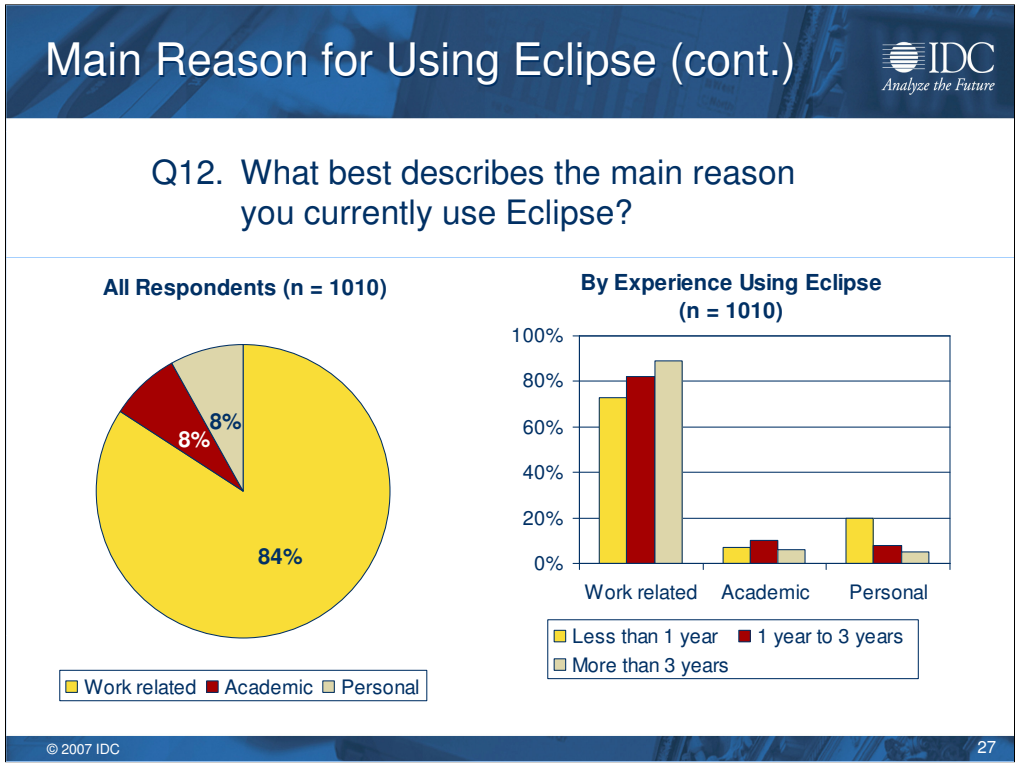
The interesting contrast here is between work related usage and academic usage:

•Asia Pacific has significantly more people using Eclipse for academic purposes (12.0%), as does Western Europe (9.2%), versus North America (3.7%).

•While not statistically significant, Latin America and the Middle East and Africa are also showing a high proportion of people using Eclipse for academic reasons (12.2% and 12.0% respectively).



What is interesting to note here is that small business (1 to 99 employees) is the most focused of all organization size categories on using Eclipse for work related purposes (fully 95% are using Eclipse for work related purposes).



A higher proportion of experienced respondents use Eclipse for work related reasons, while a higher proportion of inexperienced respondents use Eclipse for personal reasons

•For work related reasons: 89% of respondents with 3 or more years of experience using Eclipse, versus 73% of respondents with less than 1 year

•For personal reasons: 20% of respondents with less than 1 year of experience using Eclipse, versus 5% of respondents with 3 or more years

Most Used Eclipse Projects

IDC Analyze the Future

Q13. In the past year, which of the Eclipse projects have you used at least once when developing software? (select all that apply):

All Respondents (n = 989)

Eclipse Project	% of Respondents	Eclipse Project	% of Respondents
Java Development Tools (JDT)	88.4%	Other	9.2%
Web Tools Project – Web Standard Tools	53.5%	Eclipse Communication Framework (ECF)	9.0%
Web Tools Project – J2EE Standard Tools	44.2%	Mobile Tools for Java	6.3%
Eclipse Rich Client Platform (RCP)	41.9%	Dynamic Languages Toolkit (DLTK)	6.0%
Eclipse Modeling Framework (EMF)	36.9%	Web Tools Project – Dali	5.8%
Mylyn (formerly Mylar)	35.8%	SOA Tools Platform	5.5%
Graphical Editor Framework (GEF)	34.8%	Dali EJB OR Mapping Project	4.0%
Visual Editor (VE)	30.3%	Eclipse Process Framework (EPF)	3.7%
C/C++ IDE (CDT)	28.5%	Device Software Development Platform – Target Management	3.4%
Data Tools Platform (DTP)	25.7%	Application Lifecycle Framework	2.6%
Test & Performance Tools Platform (TPTP)	25.5%	Embedded RCP (eRCP)	2.4%
Graphical Modeling Framework (GMF)	24.8%	Device Software Development Platform – Device Debugging	1.3%
UML2	20.8%	Corona	1.0%
Equinox	17.5%	Native Application Builder	0.6%
PHP Development Tools (PDT)	17.5%	Parallel Tools Platform	0.6%
TPTP Tracing and Profiling	17.4%	Voice Tool Project	0.6%
Business Intelligence and Reporting Tools (BIRT)	16.9%	Photran	0.5%
Aspect J Development Tools (AJDT)	13.2%	Higgins Trust Framework	0.4%
Web Tools Project – JavaServer Faces	12.4%	Open Healthcare Framework	0.4%
Web Tools Project – AJAX Tools Framework	10.6%	Aperi Storage Management	0.3%

Respondents are using a wide assortment of Eclipse projects, with the top 5 most common projects in use being:

- Java Development Tools (JDT) – 88% of respondents
- Web Tools Project – Web Standard Tools – 54% of respondents
- Web Tools Project – J2EE Standard Tools – 44% of respondents
- Eclipse Rich Client Platform (RCP) – 42% of respondents
- Eclipse Modeling Framework (EMF) – 37% of respondents

Most Used Eclipse Projects (cont.)

IDC Analyze the Future

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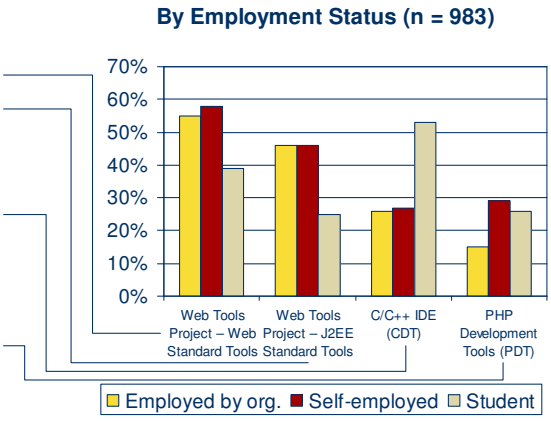

There are some significant differences when segmenting by employment status:

•Students have much lower usage of Web Standard Tools (39% versus 55% for employed by an organization, and 58% for self-employed) and J2EE Standard Tools (25% for students versus 46% for the others)

•Students have much higher usage of C/C++ IDE (53% versus 26% and 27% respectively)

•Respondents employed by an organization have a much lower usage of PHP Development Tools (15% versus 29% for self-employed and 26% for students)

Most Used Eclipse Projects (cont.)

IDC Analyze the Future

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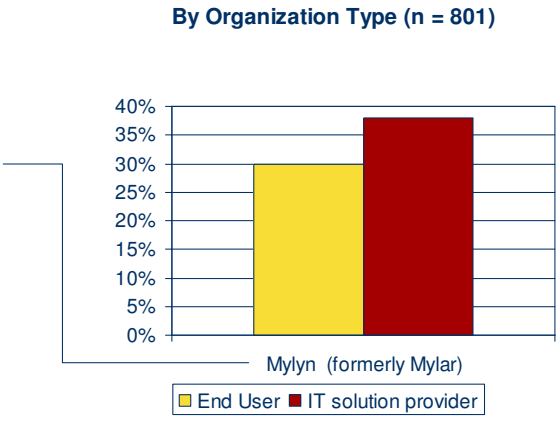

End users have a significantly lower usage of Mylyn than IT solution providers (30% versus 38%)

Most Used Eclipse Projects (cont.)

IDC Analyze the Future

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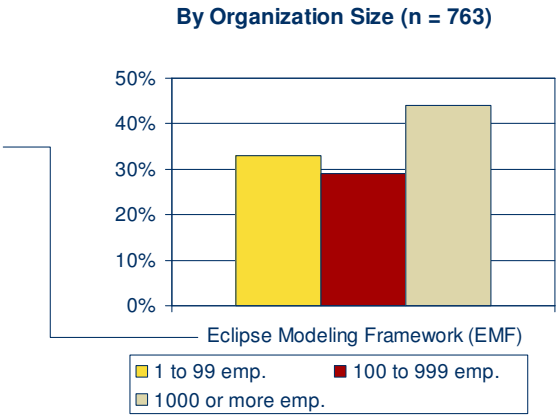
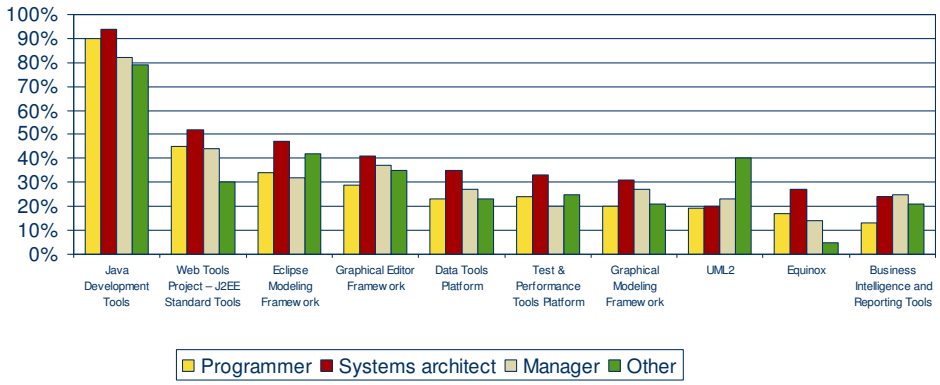


Large organizations (1000 or more employees) have a much higher usage of Eclipse Modeling Framework (44%) than small organizations (1 to 99 employees, 33%) and mid-sized organizations (100 to 999 employees, 29%)

Most Used Eclipse Projects (cont.)

Q13. In the past year, which of the Eclipse projects have you used at least once when developing software? (select all that apply):

By Employee Position (n = 801)



There are several significant differences in usage when segmenting respondents employed by an organization by their position within the organization, with Systems Architects standing out:

•94% of Systems Architects and 90% of Programmers use Java Development Tools, whereas usage drops to 82% and 79% for Managers and other employees respectively

•Over half (52%) of Systems Architects use J2EE Standard Tools, versus 45% of Programmers, 44% of Managers, and just 30% of other employees.

•Almost half (47%) of Systems Architects use Eclipse Modeling Framework, versus 34% of Programmers, 32% of Managers, and 42% of other employees.

•41% of Systems Architects and 37% of Managers use Graphical Editor Framework versus 29% of Programmers, 35% of other employees

•35% of Systems Architects use Data Tools Platform versus 23% of Programmers, 27% of Managers, and 23% of other employees

•33% of Systems Architects use Test and Performance Tools Platform versus 24% of Programmers, 20% of Managers, and 25% of other employees

•31% of Systems Architects and 27% of Managers use Graphical Modeling Framework versus 20% of Programmers, 21% of other employees

•UML2 is different in that 40% of other employees use it, versus much lower usage by Systems Architects (20%), Programmers (19%) and Managers (23%)

•27% of Systems Architects use Equinox versus 17% of Programmers, 14% of Managers, and 5% of other employees

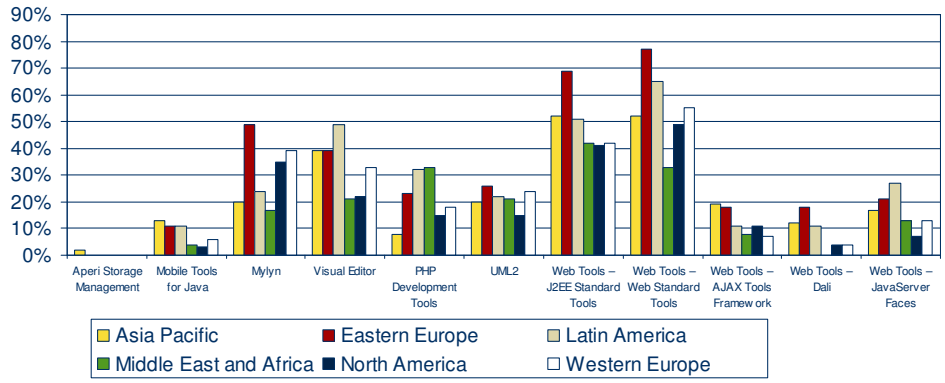
•24% of Systems Architects, 25% of Managers, and 21% of other employees use Business Intelligence and Reporting Tools versus 13% of Programmers

Most Used Eclipse Projects (cont.)

IDC Analyze the Future

Q13. In the past year, which of the Eclipse projects have you used at least once when developing software? (select all that apply):

By Region (n = 988)



Some regional differences in usage of various Eclipse projects are also apparent:

•Web Tools Platform projects in general tend to be more popular in Eastern Europe, Latin America, and in most cases Asia Pacific, relative to North America, Western Europe, and Middle East and Africa

•The Aperi Storage Management is almost exclusively used in Asia Pacific at present, and even there the usage is very low (2.4%)

•Mobile Tools for Java is used predominantly in Asia Pacific, Eastern Europe, and Latin America

•Mylyn is most popular in Eastern Europe (48%), Western Europe (39%), and North America (35%) versus all the other regions (24% or less)

•Visual Editor shows high usage in Latin America (49%), Eastern Europe (39%) and Latin America (38%)

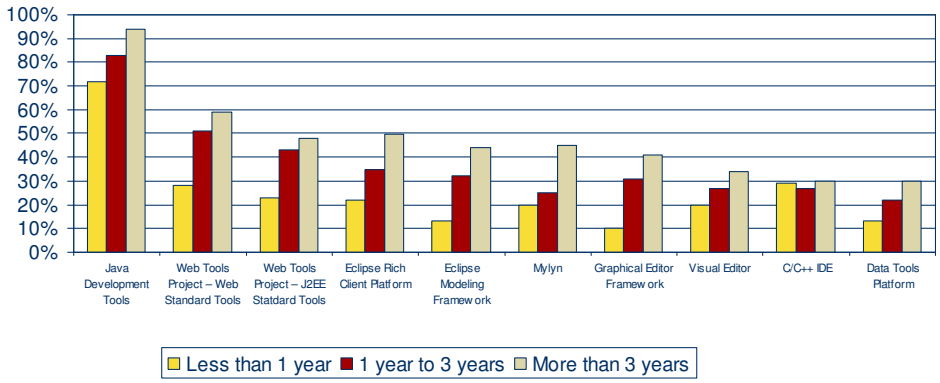
•PHP Development Tools are most popular in Middle East and Africa (33%) and Latin America (32%)

•UML2 has particularly low usage in North America (15%) versus the other regions (from 20% to 26%)

Most Used Eclipse Projects (cont.)

Q13. In the past year, which of the Eclipse projects have you used at least once when developing software? (select all that apply):

By Experience Using Eclipse (n = 989)



Across the board, usage of the various projects goes up with the number of years of experience of the respondents. In the top 10 Eclipse projects shown here, all but one project (C/C++ IDE) show significantly different usage percentages when grouping respondents by their years of experience.

This trend continues for the less used projects as well. For example:

•Test & Performance Tools Platform – used by 5% of respondents with less than 1 year experience, by 20% of respondents with 1 to 3 years, and by 32% of respondents with more than 3 years

•Graphical Modeling Framework – used by 11%, 23% and 28% of respondents with less than 1 year, 1 to 3 years, and more than 3 years experience respectively

•Equinox – used by 0%, 11%, and 24% respectively

•TPTP Racing and Profiling – used by 3%, 11%, and 24% respectively

Software Built Using Eclipse

IDC Analyze the Future

Q14. What types of software are you building when you use Eclipse, and at what stage of deployment are they?

All Respondents (n = 937)

Software Built With Eclipse	% of Respondents
Server-centric applications	71.8%
Desktop client applications (not Eclipse RCP	40.8%
Plug-ins for Eclipse	38.5%
Rich client applications using Eclipse RCP	35.1%
Thin-client applications	29.2%
Embedded software	13.8%
Applications built on Eclipse Equinox	11.5%
Mobile client applications	9.7%

The majority of applications built using Eclipse are server-centric applications: 72% of all respondents are developing and/or supporting server-centric applications built using Eclipse.

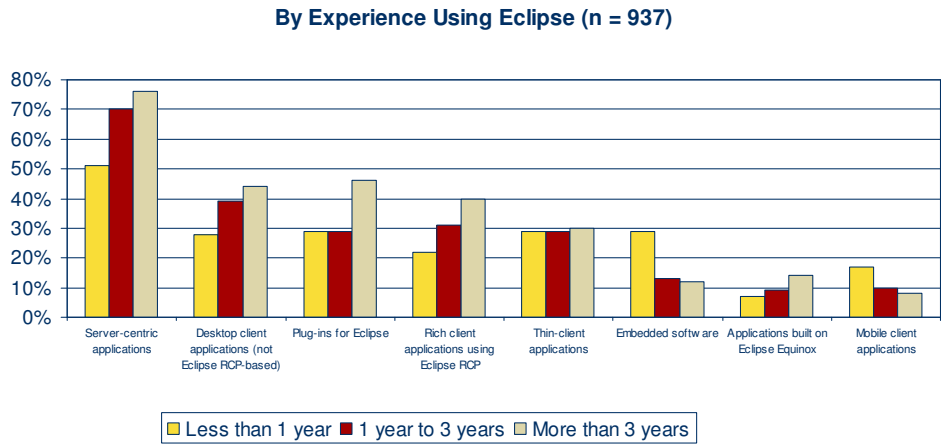
There aren't really any significant differences for each of these types of software when segmenting respondents by organization type, size, business focus, etc., with the following exceptions:

- Fewer students are developing server-centric applications compared with employed respondents (just 42% of students are developing these types of applications, whereas 74% of respondents employed at an organization, and 83% of self-employed respondents are developing server-centric applications)
- Conversely, more students are developing desktop client applications (54%) than respondents employed by an organization (40%) and self-employed respondents (37%)
- More IT solution providers are developing plug-ins for Eclipse (41%) than end users (26%)
- Fewer end users are developing mobile client applications (5%) than IT solution providers (10%), and the ones who are developing these applications tend to be with small companies (13% of respondents from companies with 1-99 employees are developing these applications, versus 6% for respondents from 100 to 999 employee-sized companies, and 6% of respondents from 1000 or more employee-sized companies)

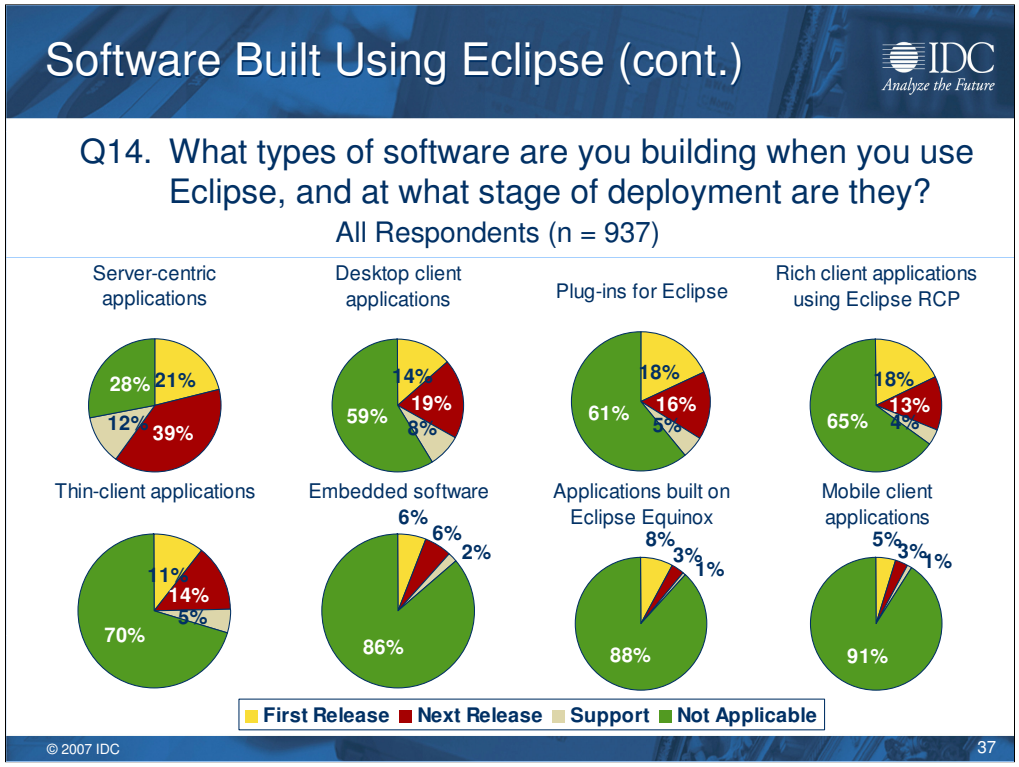
Software Built Using Eclipse (cont.)

IDC Analyze the Future

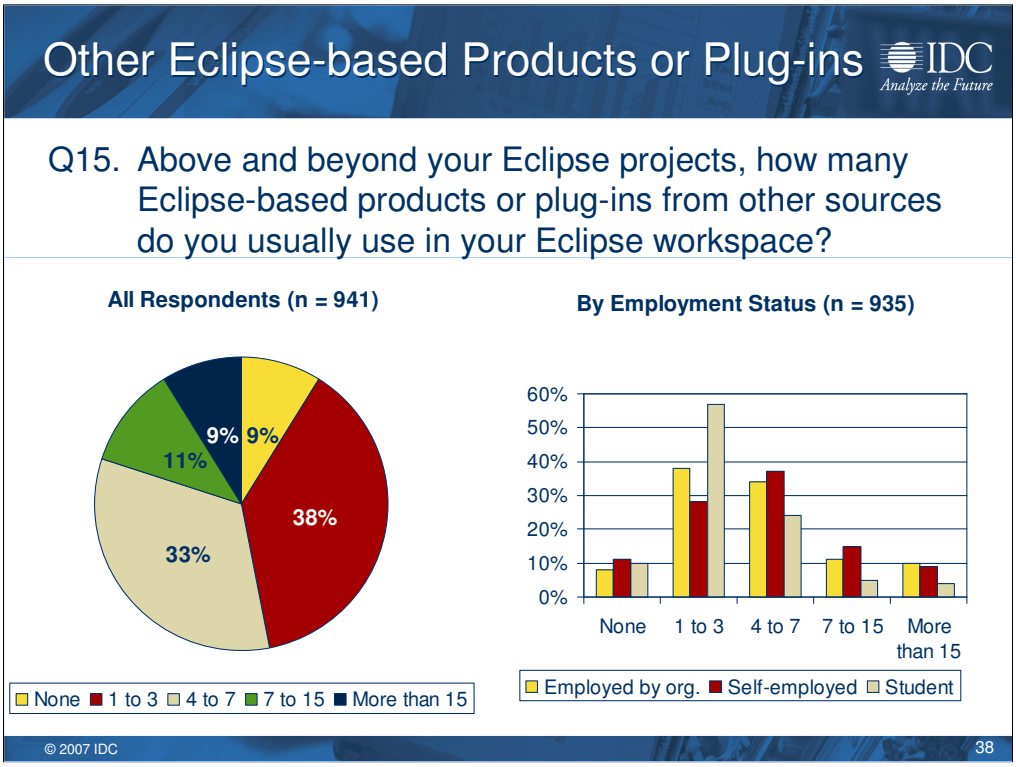
Q14. What types of software are you building when you use Eclipse, and at what stage of deployment are they?



A smaller proportion of inexperienced respondents (i.e. with less than 1 year experience) are developing server-centric applications, desktop client applications, plug-ins for Eclipse, rich client applications, and applications built on Equinox when compared with very experienced respondents (i.e. more than 3 years of experience). However, a higher proportion of inexperienced respondents seem to be favoring embedded software and mobile client applications, perhaps reflecting a higher comfort level (or simply interest level) that they are bringing to the Eclipse community in these two target software deployment areas.



Server-centric applications tend to be the most mature, with a 2.3 to 1 ratio of respondents developing next release applications or providing support, to respondents developing first release applications. This ratio contrasts sharply with the corresponding ratios for the next most common type of applications, desktop client applications, with a ratio of 1.9 to 1, through the least common types of applications, applications built on Eclipse Equinox (0.5 to 1) and mobile client applications (0.8 to 1).



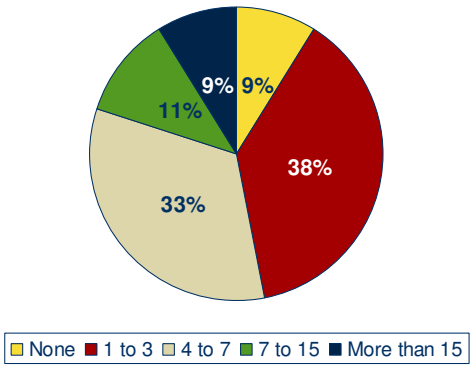
Over 90% of respondents use 1 or more Eclipse-based products or plug-ins from other sources. The majority (53%) use at least 4. The main exception to this is students; the majority of students (57%) use 1 to 3 Eclipse-based products or plug-ins from other sources.

Other Eclipse-based Products or Plug-ins (cont.)

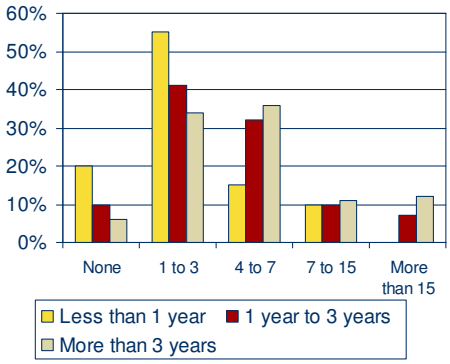
IDC Analyze the Future

Q15. Above and beyond your Eclipse projects, how many Eclipse-based products or plug-ins from other sources do you usually use in your Eclipse workspace?

All Respondents (n = 941)



By Experience Using Eclipse (n = 941)



With experience comes the propensity to use Eclipse-based products or plug-ins from other sources.

Respondent Activity in Community

IDC Analyze the Future

Q22. How have you personally participated in the Eclipse community in the last 12 months? (select all that apply):

All Respondents (n = 831)

Type of Community Participation	% of Respondents
Use Eclipse but don't participate	57.8%
Enter bug(s)	36.6%
Respond to newsgroup posts	25.5%
Write about Eclipse	16.4%
Enter patch(es)	12.2%
Present about Eclipse	9.7%
Test/QA	7.3%
Document Eclipse	6.9%
Committer and submit code	6.7%

Just over half of the respondents use Eclipse, but do not otherwise participate in the community. Of those who actively participate in the community, the top activity is entering bugs into Bugzilla, with 1/3 of the respondents contributing bugs.

Note: the data for this question in particular may be biased by the potential for respondents to this survey being more inclined to be active in the community. It is possible and perhaps probable that the general population of the Eclipse community may be somewhat less active than the response to this question may suggest, although it is impossible at this point to gauge to what extent this is true.

Respondent Activity in Community (cont.)

IDC Analyze the Future

Q22. How have you personally participated in the Eclipse community in the last 12 months? (select all that apply):

Type of Community Participation	% of Respondents
Use Eclipse but don't participate	57.8%
Enter bug(s)	36.6%
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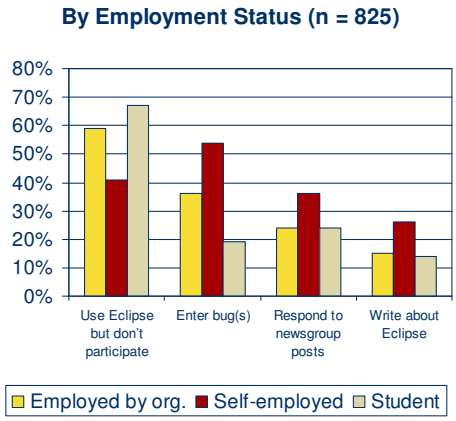

Self-employed respondents are definitely the most active when compared with individuals employed by an organization and with students, particularly in the types of activities with the most level of activity overall: entering bugs, responding to newsgroup posts, and writing about Eclipse.

Respondent Activity in Community (cont.)

IDC Analyze the Future

Q22. How have you personally participated in the Eclipse community in the last 12 months? (select all that apply):

Type of Community Participation	% of Respondents
Use Eclipse but don't participate	57.8%
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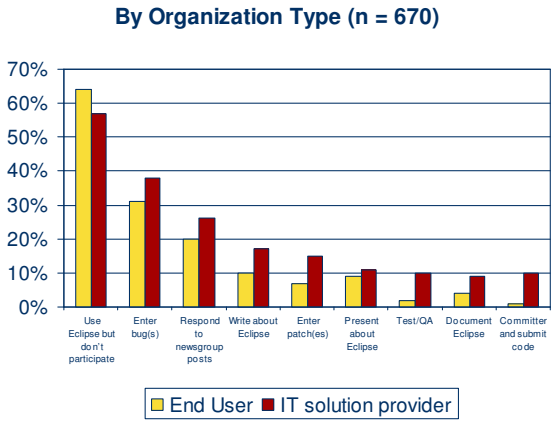

IT Solution Providers are much more active across all types of community activities when compared with end users.

Respondent Activity in Community (cont.)

IDC Analyze the Future

Q22. How have you personally participated in the Eclipse community in the last 12 months? (select all that apply):

Type of Community Participation	% of Respondents
Use Eclipse but don't participate	57.8%
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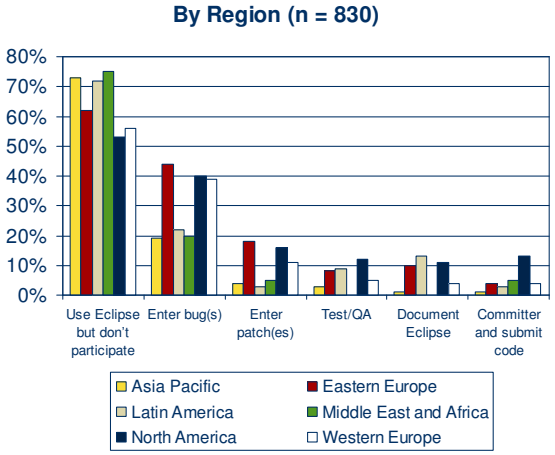
Committer and submit code	6.7%



North American respondents are the most active in the community relative to other regions in the world, with Western European and in some cases Eastern European respondents also quite active. North America is the home to the bulk of the committers: 13% of North American respondents are committers, whereas the next highest percentage is 5% in Middle East and Africa – a region with few respondents to begin with.

More generally, North Americans are the most active in the software-intensive activities like entering bugs and patches, and testing, documenting, and submitting code, but Eastern Europeans and in most cases Western Europeans are quite active in these areas as well.

Respondent Activity in Community (cont.)

IDC Analyze the Future

Q22. How have you personally participated in the Eclipse community in the last 12 months? (select all that apply):

Type of Community Participation	% of Respondents
Use Eclipse but don't participate	57.8%
Enter bug(s)	36.6%
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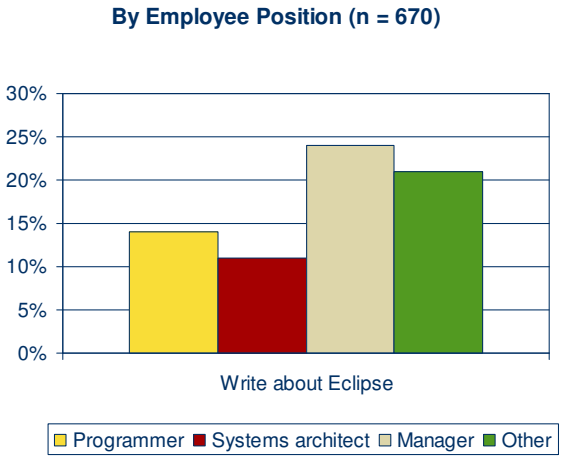
Document Eclipse	6.9%
Committer and submit code	6.7%



The only significant difference within community activities when segmenting by employee position can be found with respondents who write about Eclipse in an article or blog post. This activity tends to be performed more by Managers and people with other positions in the organization than by Programmers and Systems Architects.

Respondent Activity in Community (cont.)

IDC Analyze the Future

Q22. How have you personally participated in the Eclipse community in the last 12 months? (select all that apply):

Type of Community Participation	% of Respondents
Use Eclipse but don't participate	57.8%
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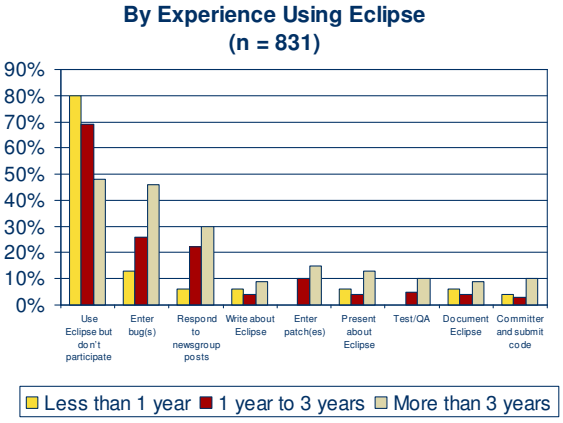


Clearly a person's experience with Eclipse is a significant contributor to the degree of participation that person has in the Eclipse community. And the activities an experienced person does is not limited to one or two; here we see a higher proportion of people with 3 or more years of experience with Eclipse in all types of activities. In fact, almost as many respondents with 3 or more years of experience enter bugs as those who use Eclipse but don't participate, and across all activities we see a slight majority of respondents (52%) who actively participate in the Eclipse community. Please note that these results may be somewhat biased by the type of person who is inclined to respond to surveys such as this survey i.e. respondents to this survey may be more active with Eclipse than the overall population of users of Eclipse.

Reasons Against More Activity

IDC Analyze the Future

Q23. What are your main reasons for not participating more in the Eclipse community? (select all that apply) :

All Respondents (n = 846)

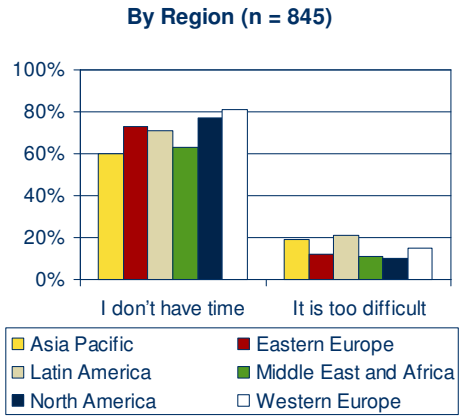
Reason Not to Participate More	% of Respondents
I don't have time	76.5%
It is too difficult	13.7%
Other	8.9%
Not interested	8.7%
The organization I work for does not allow it	7.9%
The Eclipse committers are not open to outside contributors	4.0%
I feel I already contribute substantially to the Eclipse community	4.0%

By far the most common reason for not participating more in the Eclipse community is lack of time. Surprisingly, just 4% of the respondents felt that they already contribute substantially to the community, and only 9% are not interested. If the issue of lack of time could be addressed somehow, then the existing community could be a significant source of additional Eclipse project contribution.

Reasons Against More Activity (cont.)

Q23. What are your main reasons for not participating more in the Eclipse community? (select all that apply) :

Reason Not to Participate More	% of Respondents
I don't have time	76.5%
It is too difficult	13.7%
Other	8.9%
Not interested	8.7%
The organization I work for does not allow it	7.9%
The Eclipse committers are not open to outside contributors	4.0%
I feel I already contribute substantially to the Eclipse community	4.0%

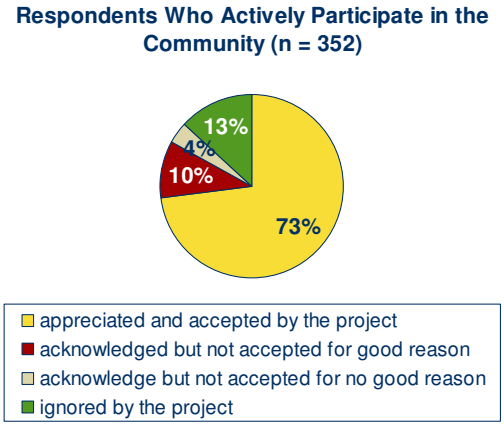


Asia Pacific respondents have the lowest percentage of respondents (60%) who do not have the time to participate more in the community, compared with the average across all regions of 77%. Perhaps the Asia Pacific region could be a source to tap for more community participation. But a higher percentage of these respondents (19%) also indicated that it is currently too difficult to participate in the community, indicating that they may need more help in understanding the options they have and the procedures to follow to become more active in the community.

Experience with an Eclipse Project

IDC Analyze the Future

Q24. In general, what statement best describes your experience participating in an Eclipse project? My contribution(s) are ...



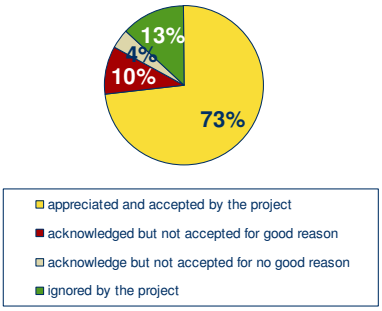
By and large community participants feel their contributions are appreciated and accepted by the project, although a surprisingly high percentage (13%) said their contributions are ignored by the project.

Experience with an Eclipse Project (cont.)

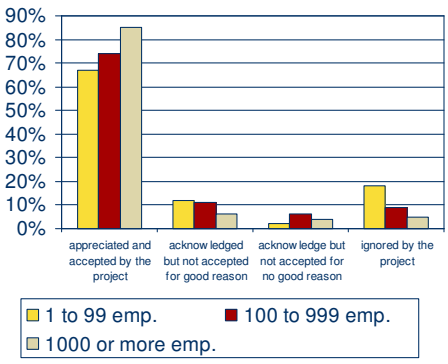
IDC Analyze the Future

Q24. In general, what statement best describes your experience participating in an Eclipse project? My contribution(s) are ...

Respondents Who Actively Participate in the Community (n = 352)



By Organization Size (n = 263)



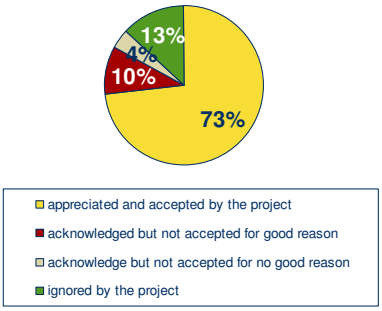
Respondents from small companies (1 to 99 employees) feel much more ignored by projects than respondents from mid- to large-sized companies.

Experience with an Eclipse Project (cont.)

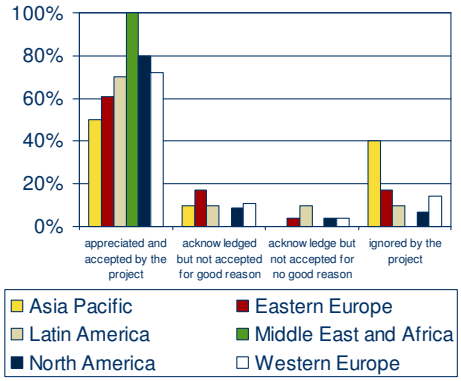
IDC Analyze the Future

Q24. In general, what statement best describes your experience participating in an Eclipse project? My contribution(s) are ...

Respondents Who Actively Participate in the Community (n = 352)



By Region (n = 352)



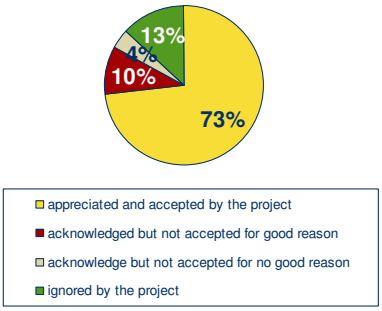
And, carrying on the them about respondents from Asia Pacific participating in the community, it would seem these respondents feel their contributions are ignored by the project, with fully 40% selecting this option, more than double any other region.

Experience with an Eclipse Project (cont.)

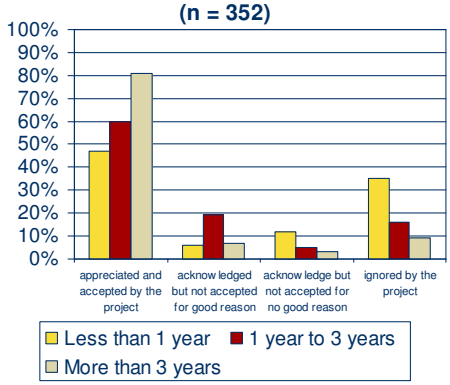
IDC Analyze the Future

Q24. In general, what statement best describes your experience participating in an Eclipse project? My contribution(s) are ...

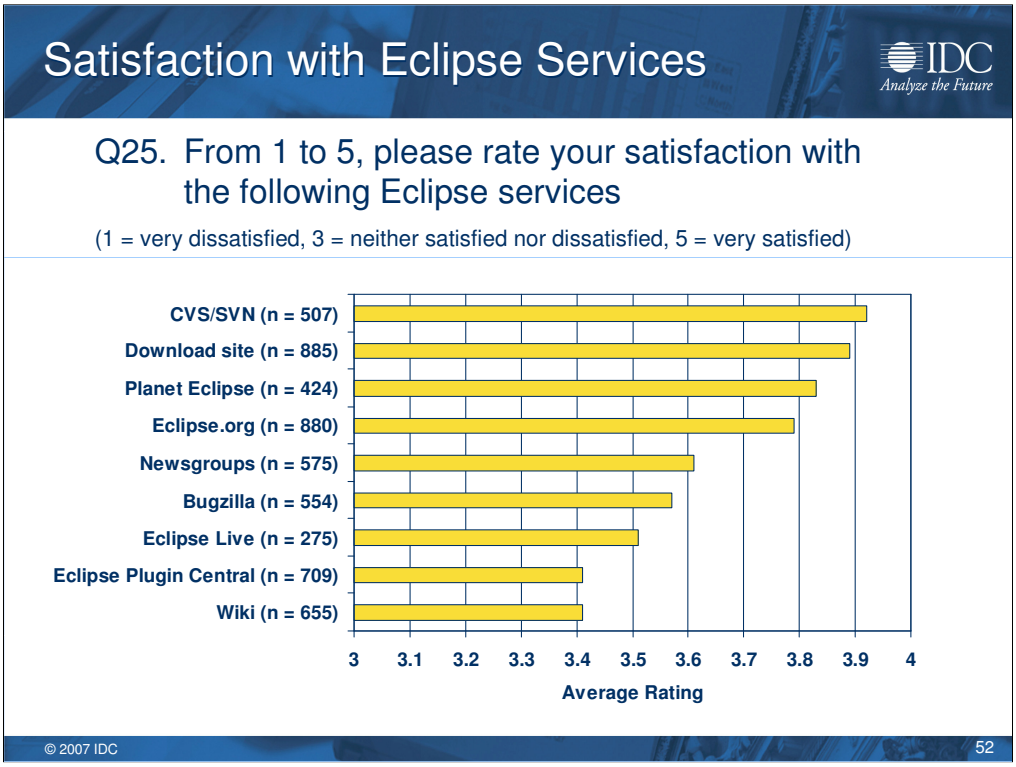
Respondents Who Actively Participate in the Community (n = 352)



By Experience Using Eclipse (n = 352)



There appears to be a correlation between a respondent's experience using Eclipse and his/her experience participating in an Eclipse project (i.e. the perception of how she/he is perceived within a project). This suggests that a person must earn the respect of his/her peers on a project by demonstrating solid knowledge of that project.



The average scores for all Eclipse services are above a neutral satisfaction rating of 3.0, meaning that respondents overall are satisfied with these services. CVS/SVN, the download site, Planet Eclipse, and Eclipse.org stand out as having particularly high satisfaction scores. Also, note the differences in the number of respondents who rated each service ("n"). These differences likely indicate differences in familiarity with these services: a low n value likely means that fewer respondents were familiar enough with the service to give an opinion.

Looking at the distribution of respondents at the extremes (i.e. scores of 1 or 2 indicating low satisfaction, and 5 indicating high satisfaction), we find:

Highest Percentage of Respondents With High Satisfaction (score of 5):

•Download site (35%), CVS/SVN (34%), Planet Eclipse (34%), Eclipse.org (27%)

Highest Percentage of Respondents With Low Satisfaction (scores of 1 or 2):

•Wiki (21%), Eclipse Plugin Central (20%), Bugzilla (18%), Eclipse Live (18%)

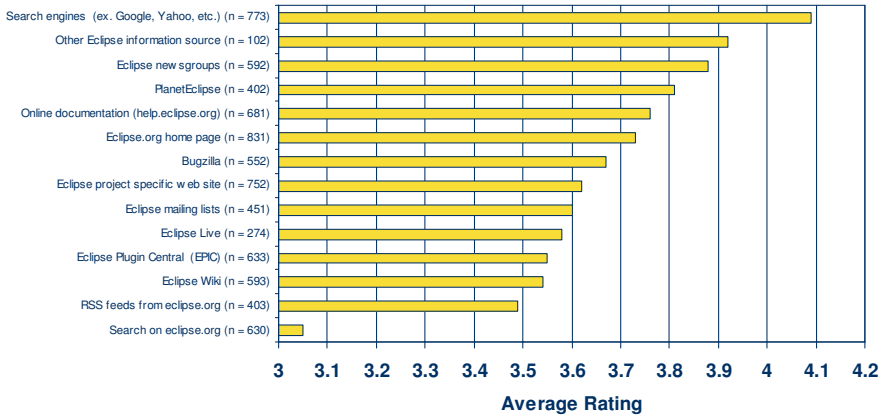
When looking at the respondents segmented by organization type, size, region, etc., we did not see any significant differences in the average scores of any one segment relative to the average scores overall.

Usefulness of Eclipse Information Sources

IDC Analyze the Future

Q26. From 1 to 5, please rate the usefulness of the following sources of information about Eclipse

(1 = useless, 3 = neither useless nor useful, 5 = very useful)

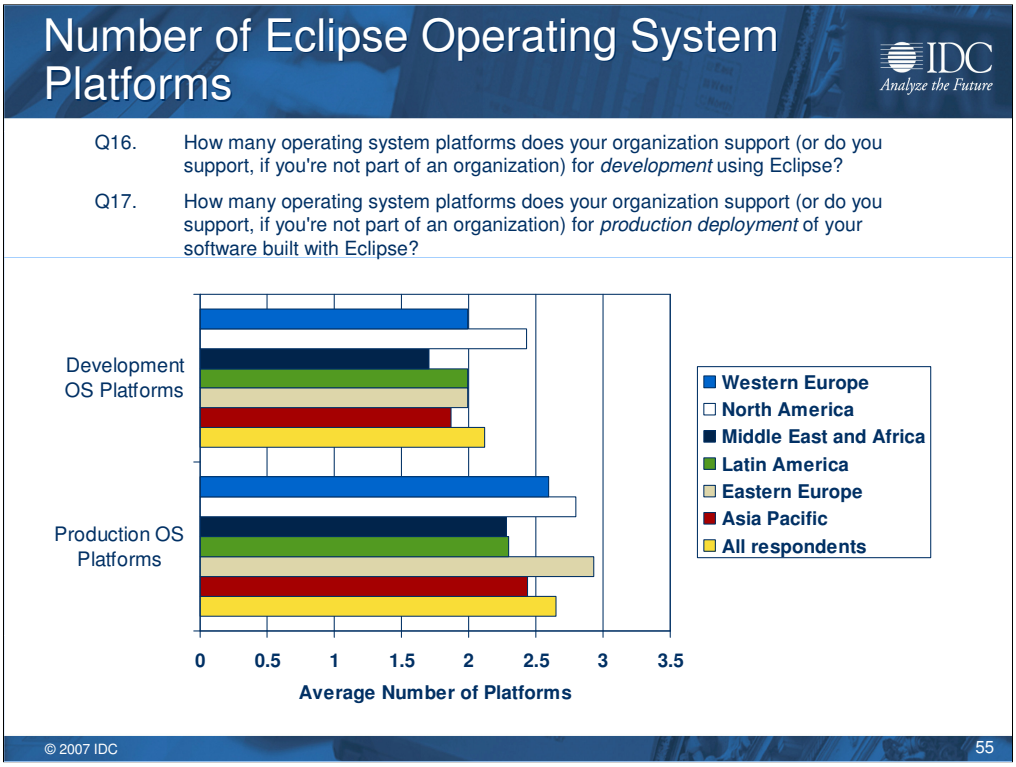


Most sources of information rank high in terms of usefulness. Interestingly, generic search engines rank the highest of all listed sources. Notable in its low ranking is the eclipse.org search capability. Again, there are no significant differences in these rankings when looking at specific segments of respondents.

Questions Applicable to Organizations

(where applicable, as opposed to individuals)

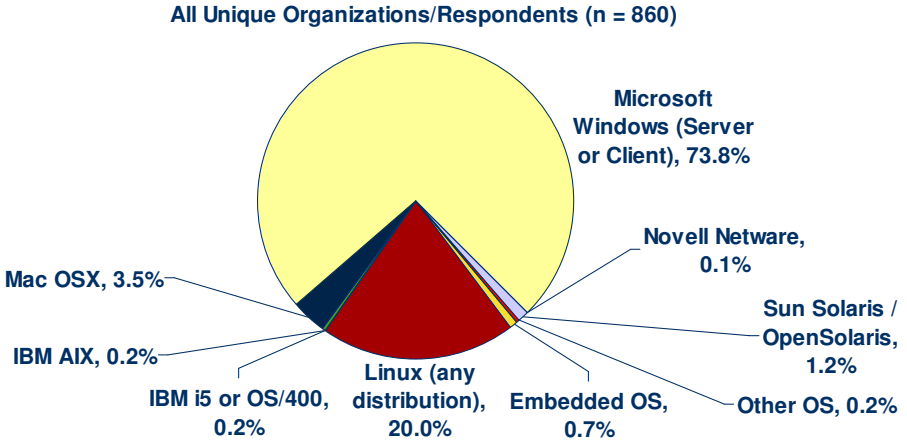
In this section, respondents have been filtered to represent unique organizations where possible. The total eligible respondent count has therefore been reduced from 1014 to 956.



On average, respondents deploy Eclipse-built applications on more operating system platforms (2.7) than they use for development (2.1). The only segments where we see significant variation from the overall averages are by region, where the Middle East and Africa has a much lower average number of development OS platforms (1.7) and North America has a much higher average number of development OS platforms (2.4). There are regional differences in the number of production OS platforms as well, but these are not statistically significant.

Primary Operating System Platform: Development

Q18. What is the primary operating system platform for your organization's (or your) development of software using Eclipse?

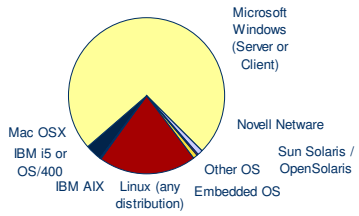


No real surprise here – almost ¾ of the primary operating system platforms for development of Eclipse applications are Windows, with Linux as the second most common OS platform for 20% of the respondents. All other platforms combined are the primary development operating systems for just 6% of the respondents.

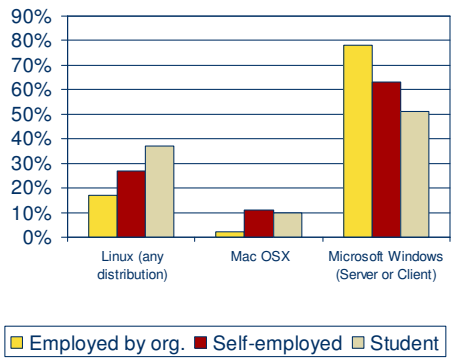
Primary Operating System Platform: Development (cont.)

Q18. What is the primary operating system platform for your organization's (or your) development of software using Eclipse?

All Unique Organizations/Respondents (n = 860)



By Employment Status (n = 854)

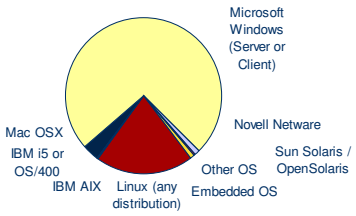


Students use Linux as the development OS platform of choice more than 2 to 1 when compared with respondents employed by an organization (37% versus 17%). And students use Max OSX (10%), bringing their usage of Windows down to just 51%. Self-employed respondents show a similar trend, although less dramatic: 27% use Linux, 11% use Mac OSX, and 63% use Windows, whereas for respondents employed at an organization, 17% use Linux, just 2% use Mac OSX, and 78% use Windows.

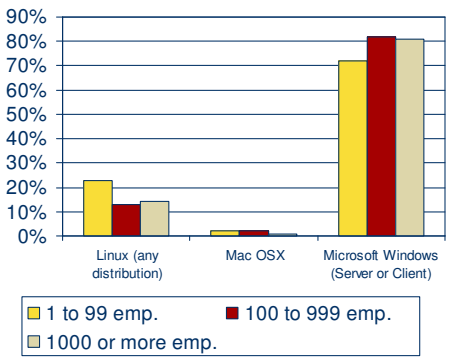
Primary Operating System Platform: Development (cont.)

Q18. What is the primary operating system platform for your organization's (or your) development of software using Eclipse?

All Unique Organizations/Respondents (n = 860)



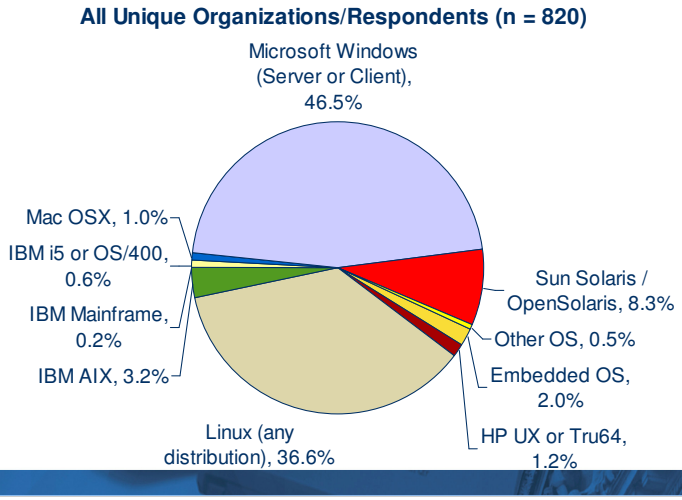
By Organization Size (n = 653)



More respondents from small companies (1 to 99 employees) use Linux as their primary OS platform (23%) than do respondents from mid-sized and large companies (13% to 14%). The higher use of Linux comes at the expense of Windows.

Primary Operating System Platform: Deployment

Q19. What is the primary operating system platform for your organization's (or your) production deployment of software built with Eclipse?



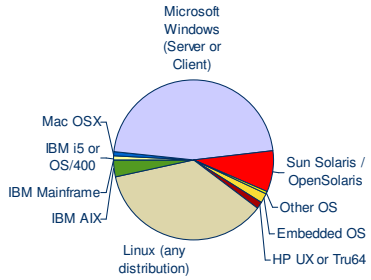
From a deployment perspective, we see Linux taking a much larger share of the respondents' primary deployment OS than we saw for development, and Sun Solaris / OpenSolaris has a significant share as well. Overall, other OS platforms besides Windows and Linux account for 17% of the respondents' primary deployment OS platforms. All this comes at the expense of Windows, with slightly less than half (47%) of the respondents' primary deployment OS.

Primary Operating System Platform: Deployment (cont.)

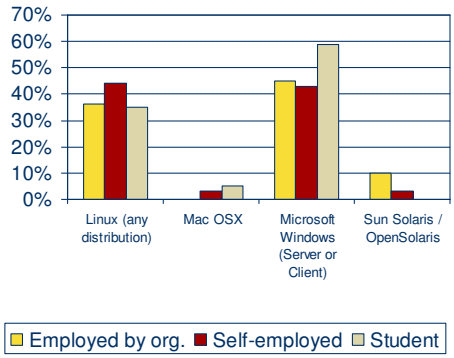
IDC Analyze the Future

Q19. What is the primary operating system platform for your organization's (or your) production deployment of software built with Eclipse?

All Unique Organizations/Respondents (n = 820)



By Employment Status (n = 814)



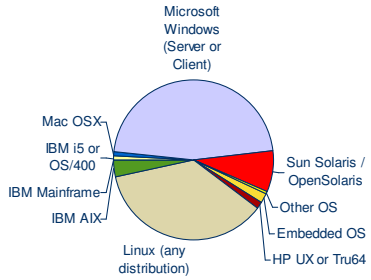
While more students are developing Eclipse applications, they are deploying those applications primarily on Windows platforms, certainly more so than respondents who are employed at an organization or are self-employed. Also, Sun Solaris / OpenSolaris is a deployment platform of choice primarily for respondents who are employed at an organization.

Primary Operating System Platform: Deployment (cont.)

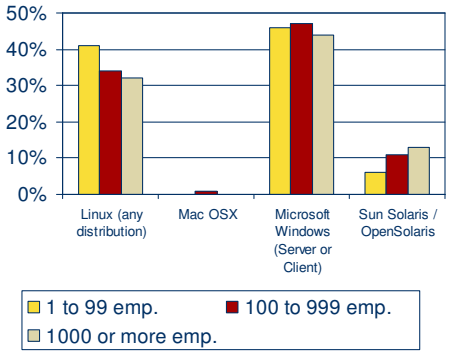
IDC Analyze the Future

Q19. What is the primary operating system platform for your organization's (or your) production deployment of software built with Eclipse?

All Unique Organizations/Respondents (n = 820)



By Organization Size (n = 629)



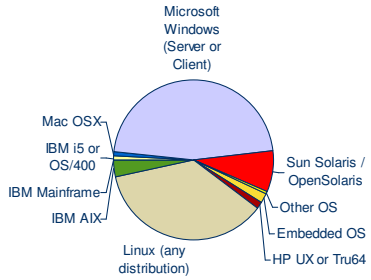
While Windows as a deployment platform remains relatively consistent, with between 44% and 47% of respondents from all sizes of organizations deploying on Windows, Linux appears to be favored more by small organizations (41% of respondents from organizations with 1 to 99 employees), and Sun Solaris / OpenSolaris is more common in organizations with 100 to 999 employees (11%) and 1000 or more employees (13%) as compared to organizations with 1 to 99 employees (6%).

Primary Operating System Platform: Deployment (cont.)

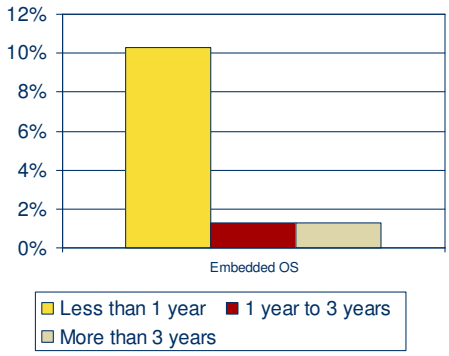
IDC Analyze the Future

Q19. What is the primary operating system platform for your organization's (or your) production deployment of software built with Eclipse?

All Unique Organizations/Respondents (n = 820)



By Experience Using Eclipse (n = 820)

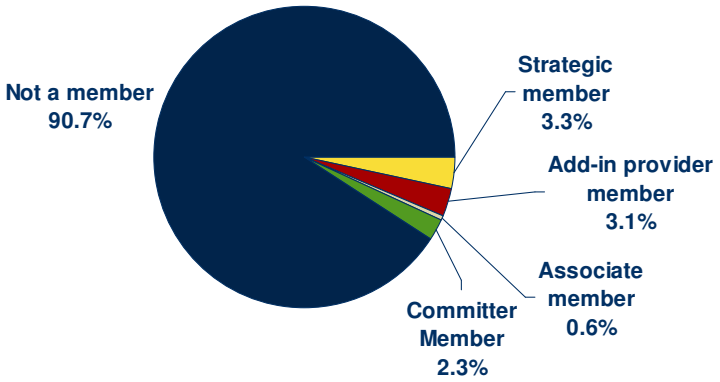


The only significant difference in primary deployment operating system platform when segmenting the respondents by their experience using Eclipse occurs with Embedded operating systems, where the overall deployment of Eclipse-built applications on embedded OSs is quite small (2%), but just over 10% of respondents with little experience using Eclipse are deploying on embedded OSs. This finding is consistent with our earlier observation that a higher proportion of inexperienced respondents are developing mobile and embedded applications.

Eclipse Foundation Membership

Q20. What type of membership, if any, do you or your organization have with the Eclipse Foundation?

All Unique Organizations/Respondents (n = 782)



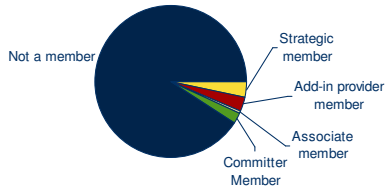
Most respondents' organizations are not a member of the Eclipse Foundation, not surprisingly, but of those who are, the highest percentage are strategic members, followed closely by add-in provider members and committer members. Very few respondents' organizations are associate members.

Eclipse Foundation Membership (cont.)

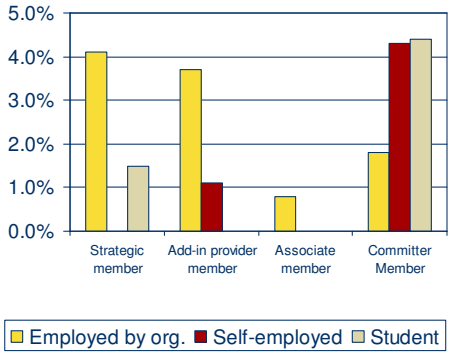
IDC Analyze the Future

Q20. What type of membership, if any, do you or your organization have with the Eclipse Foundation?

All Unique Organizations/Respondents (n = 782)



By Employment Status (n = 776)

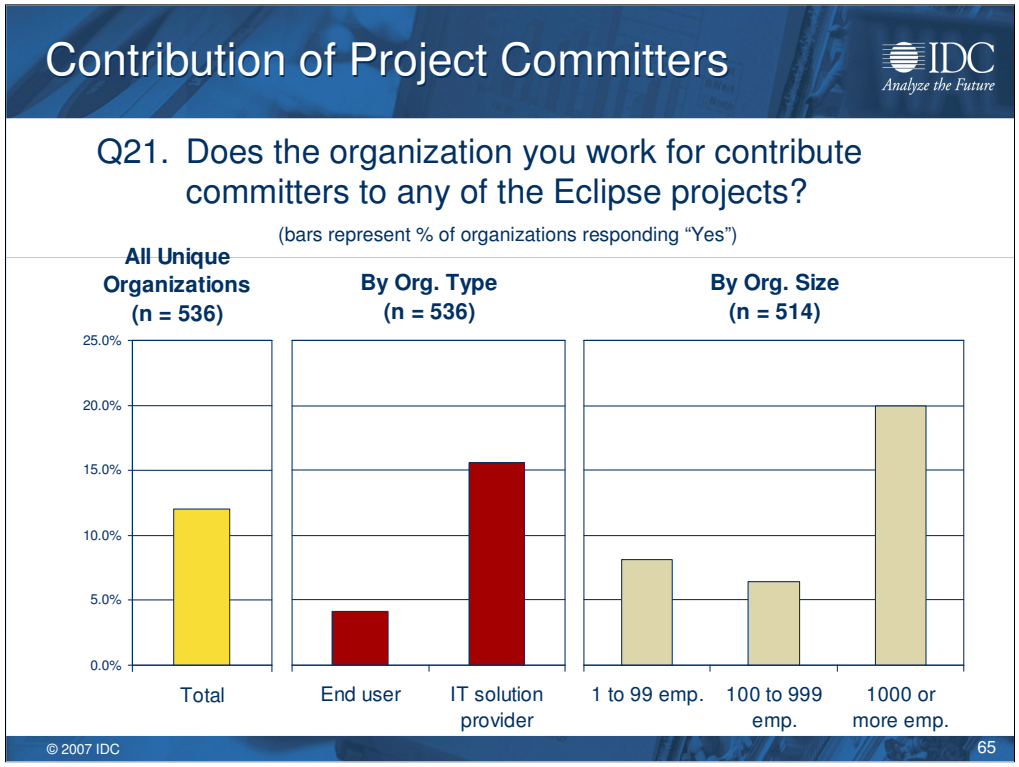


Focusing on respondents who are members of Eclipse, we see some major differences by employment status:

•A higher proportion of respondents employed by an organization are Strategic members or Add-in provider members

•But a higher proportion of students and self-employed respondents are committer members

These results underscore the importance of maintaining good relationships with in the community throughout the employment spectrum: from students through large companies. They also suggest that the Eclipse Foundation needs to recognize and perhaps appeal to different types of people for the differing roles filled by its members.



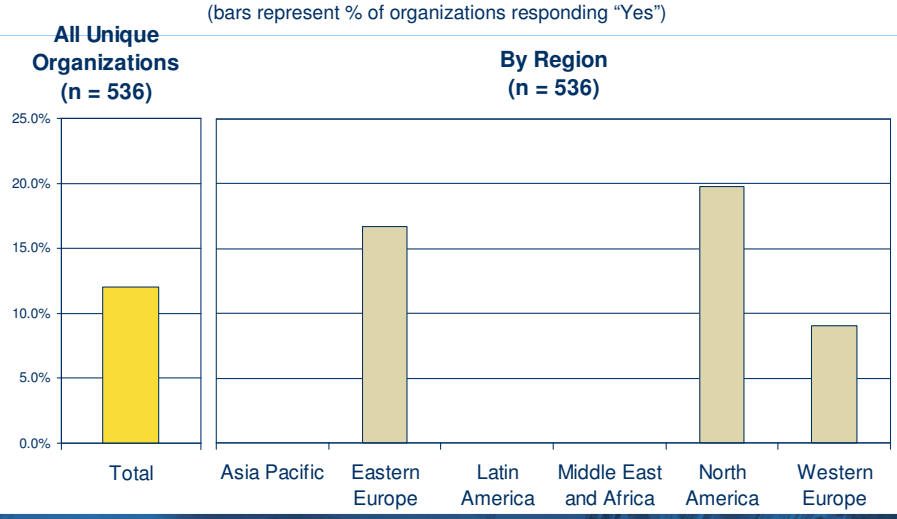
Focusing only on organizations for the moment, 12% of respondents employed by organizations said their organizations contribute committers to at least one Eclipse project. But there are significant differences when looking at the type of organization, where IT solution providers as a group are much more active in contributing committers than are end user organizations. And large companies (1000 or more employees) are much more active in contributing committers than are smaller companies.

Contribution of Project Committers (cont.)

IDC Analyze the Future

Q21. Does the organization you work for contribute committers to any of the Eclipse projects?

(bars represent % of organizations responding "Yes")

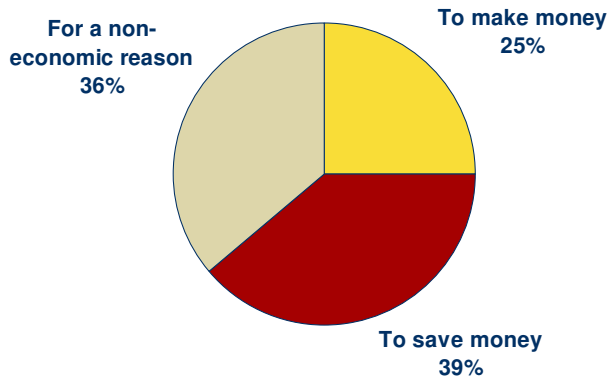


Here we see that as a percentage of organizations in each region, North American organizations are most active in contributing committers (more than twice the percentage of companies than Western Europe, which has the largest total number of organizations in this survey). Not surprisingly, given earlier observations about the respondents in Asia Pacific, there are no organizations from in this survey that have contributed committers from this region. Latin America and the Middle East and Africa are also inactive in this regard.

Motivation to Use Eclipse

Q27. What is the main motivation for your (organization's) usage of Eclipse software in the last year?

All Unique Organizations / Respondents (n = 853)



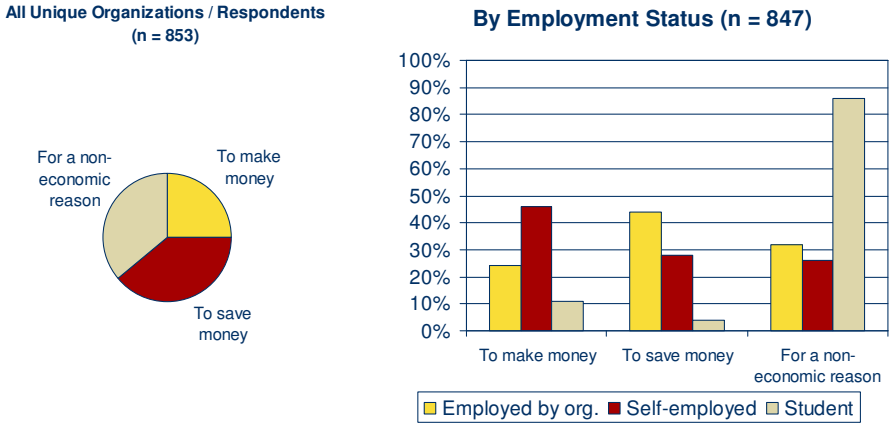
When looking at the motivation to use Eclipse, we see a high percentage (25%) of respondents say their main motivation is to make money. But to IDC's surprise, we also see a high percentage (36%) say they are motivated by non-economic reasons. Given the more commercial orientation of the projects in Eclipse, we thought the main motivation would be economic (i.e. to make or save money).

As a point of comparison, IDC surveyed the OpenOffice.org (OOo) community a year ago, and found that just 2% of that community was motivated to use OOo to generate revenue, 42% to reduce cost (the Eclipse percentage of 39% is quite close), while the majority (56%) were motivated by non-economic reasons.

Motivation to Use Eclipse (cont.)

IDC Analyze the Future

Q27. What is the main motivation for your (organization's) usage of Eclipse software in the last year?



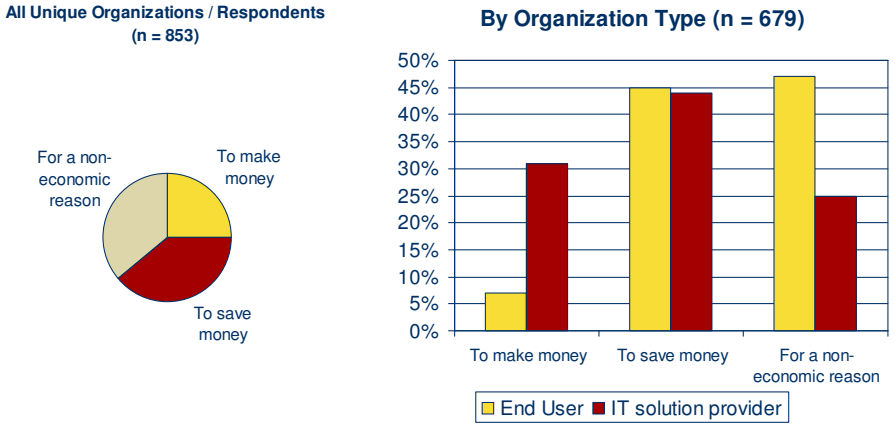
There are significant differences in motivation to use Eclipse when segmenting respondents by employment status:

- Respondents employed by an organization are motivated most by the opportunity to save money for their organization
- Self-employed respondents are motivated most by the opportunity to make money
- Students by far are motivated by non-economic reasons

Motivation to Use Eclipse (cont.)

IDC Analyze the Future

Q27. What is the main motivation for your (organization's) usage of Eclipse software in the last year?



Again, we see significant differences in motivation to use Eclipse when segmenting respondents who are employed by an organization by the type of organization:

•End user organizations are almost balanced between saving money and other, non-economic motivations for using Eclipse

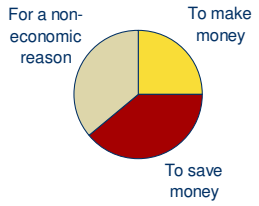
•IT solution providers, understandably, are much more motivated by the opportunity to make money using Eclipse, however even in this group the largest single motivation is to save money. Only 25% of IT solution providers are motivated by non-economic reasons.

Motivation to Use Eclipse (cont.)

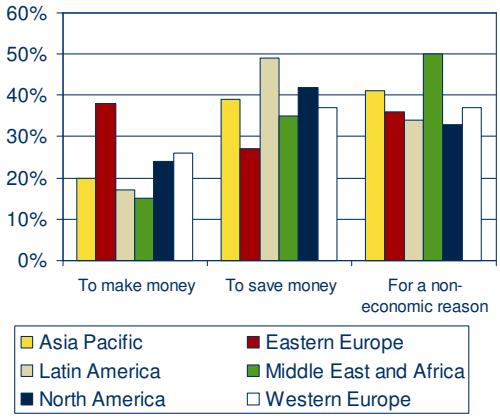
IDC Analyze the Future

Q27. What is the main motivation for your (organization's) usage of Eclipse software in the last year?

All Unique Organizations / Respondents (n = 853)



By Region (n = 852)



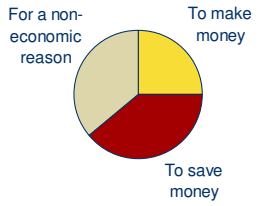
While there appear to be differences in motivation when looking at some of the regions, the regions with the higher proportion of respondents (Western Europe, North America, and to some degree, Asia Pacific) don't differ much. Eastern European respondents appear much more motivated by the opportunity to make money, Latin Americans by the opportunity to save money, and respondents from the Middle East and Africa by non-economic reasons, but the sample sizes in these regions are low and therefore may not be indicative of all people working with Eclipse in these regions.

Motivation to Use Eclipse (cont.)

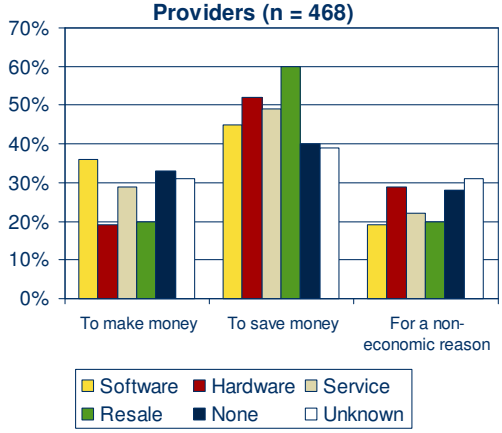
IDC Analyze the Future

Q27. What is the main motivation for your (organization's) usage of Eclipse software in the last year?

All Unique Organizations / Respondents (n = 853)



By Business Focus of IT Solution Providers (n = 468)

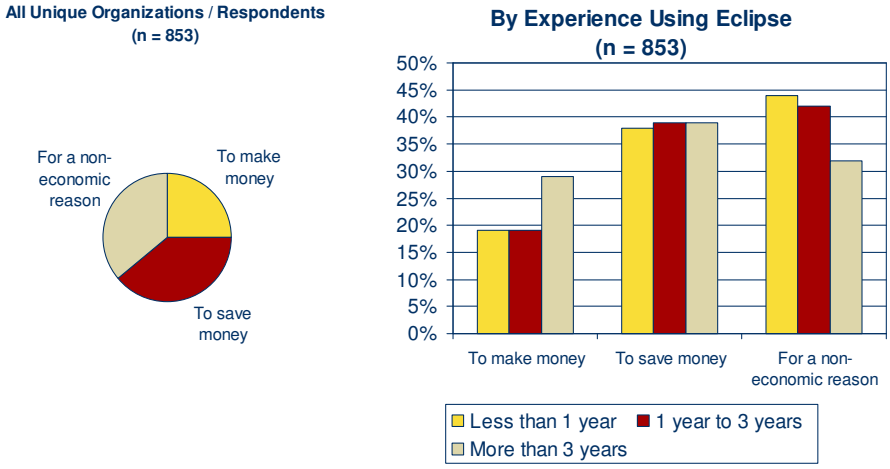


There are no statistically significant differences in motivations to use Eclipse when segmenting by the business focus of organizations. Having said this, it is interesting to note that more hardware and resale-focused companies sampled here are motivated to save money than to make money, when compared with software- and service-focused companies, as we would expect.

Motivation to Use Eclipse (cont.)

IDC Analyze the Future

Q27. What is the main motivation for your (organization's) usage of Eclipse software in the last year?



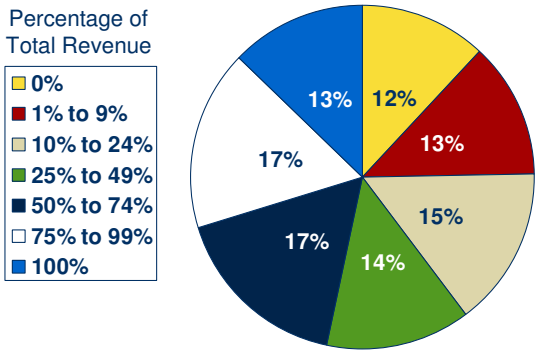
While roughly the same proportion of respondents (38% to 39%) use Eclipse to save money, regardless of their years of experience using Eclipse, a much higher proportion of experienced respondents (29% of respondents with more than 3 years experience, versus 19% for the others) use Eclipse to make money, and a much lower proportion (32% of respondents with more than 3 years experience, versus 42% and 44% for the others) use Eclipse for non-economic reasons.

Either Eclipse users are changing their reasons for using Eclipse from non-economic to economic (specifically to making money) as they gain more experience with Eclipse, or more likely the non-economic users are dropping out of the Eclipse community (or at least becoming less active) while the users focused on making money from Eclipse are becoming more active and are taking their place.

Revenue on Eclipse

Q28. Approximately what percentage of your (organization's) total worldwide revenue is from products and/or services based on or developed with, at least in part, Eclipse software?

Respondents Motivated to Make Money Using Eclipse
(n = 142)

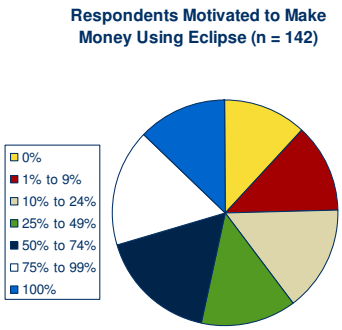


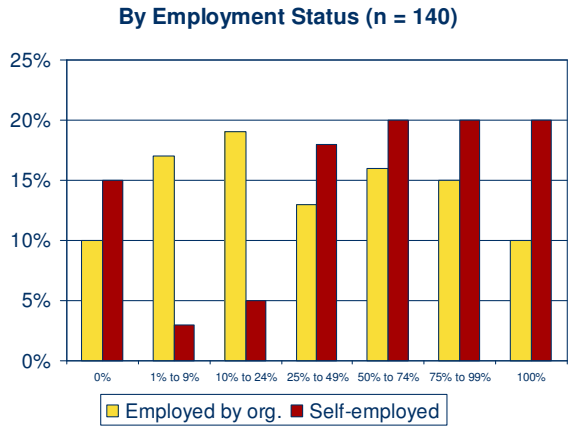
Of the respondents whose prime motivation for using Eclipse is to make money, there is a fairly even distribution of respondents across the various ranges of percentage of total revenue. The weighted average percentage of total revenue for these respondents is 46%. For comparison purposes, the weighted average percentage of total revenue for OOo respondents last year was 26%, and this was the average across far fewer respondents (n = 21).

Clearly, for those companies that are motivated by making money from Eclipse-based applications, this can be a serious business.

Revenue on Eclipse (cont.)

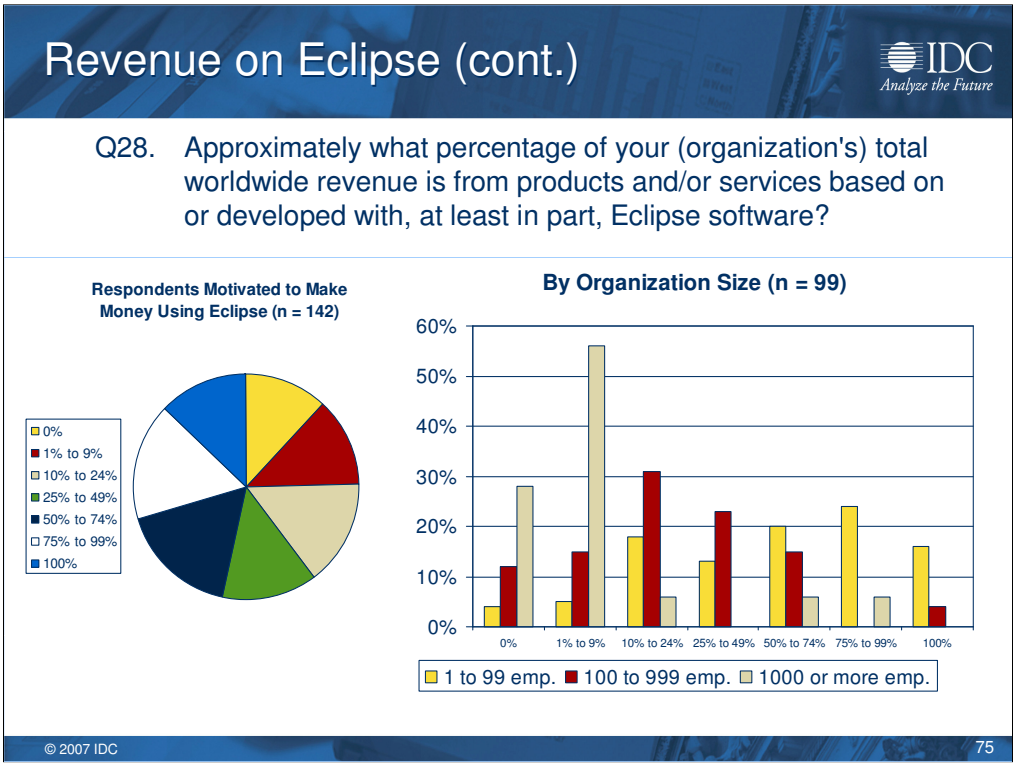
Q28. Approximately what percentage of your (organization's) total worldwide revenue is from products and/or services based on or developed with, at least in part, Eclipse software?





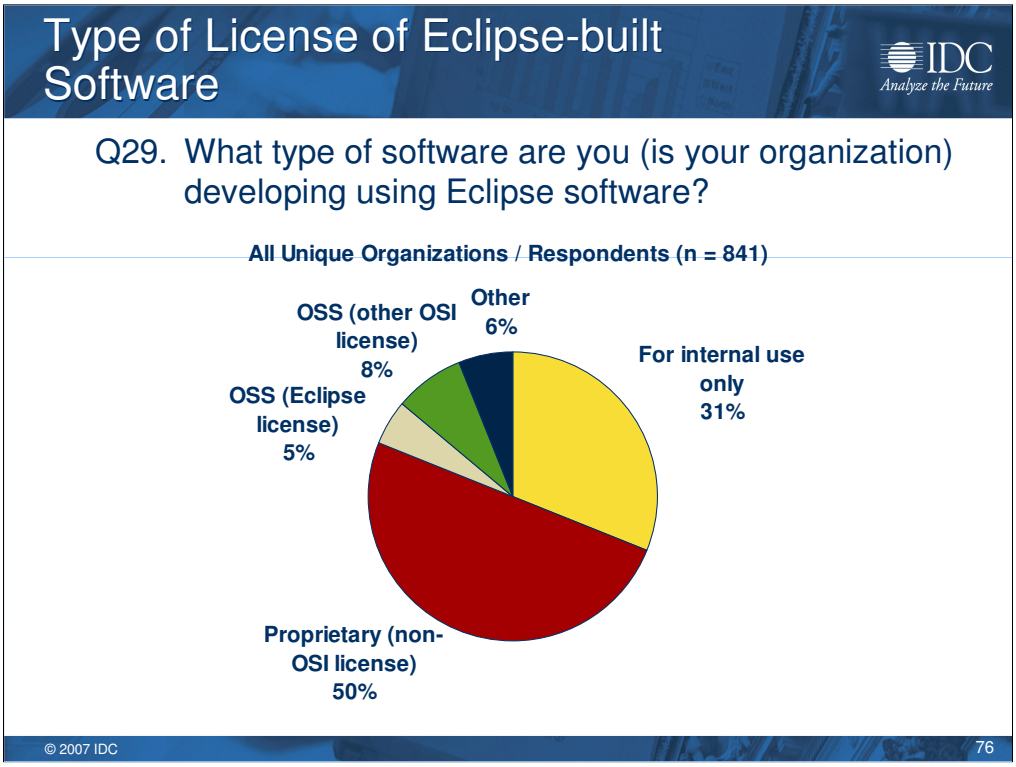
From the perspective of percentage of total revenue, self-employed respondents are much more reliant on Eclipse-based applications to generate revenue than are respondents employed by an organization.

Note: there are only 2 students who said they are motivated by the opportunity to make money, which is too small a number to derive any meaningful results, so they are not included in this graph.



By size of organization, it is the smaller companies (1 to 99 employees) that are making a higher percentage of their total revenue from Eclipse-based solutions when compared with mid-sized (100 to 999 employees) and especially large companies (1000 or more employees).

There is no real surprise here, but it does reinforce the notion that it is the early-stage, smaller companies that embrace new technology, see new business opportunity, and make the new business a significant portion of their overall business. Large companies, having a well established revenue base already, are much slower in embracing new technology and converting that technology into meaningful revenue.



Half of all unique organizations / respondents are using Eclipse to develop software licensed under a non-OSI approved license, which we have labeled as “proprietary” software. We believe this reflects one of the main attractions of the Eclipse license: in contrast with the GPL, the Eclipse license is a permissive license that does not make specific demands of software developed with or embedding Eclipse software.

There is also a large portion of respondents (31%) developing software using Eclipse strictly for internal use, which is not surprising given the fact that 29% of all respondents employed by an organization are working at end user organizations.

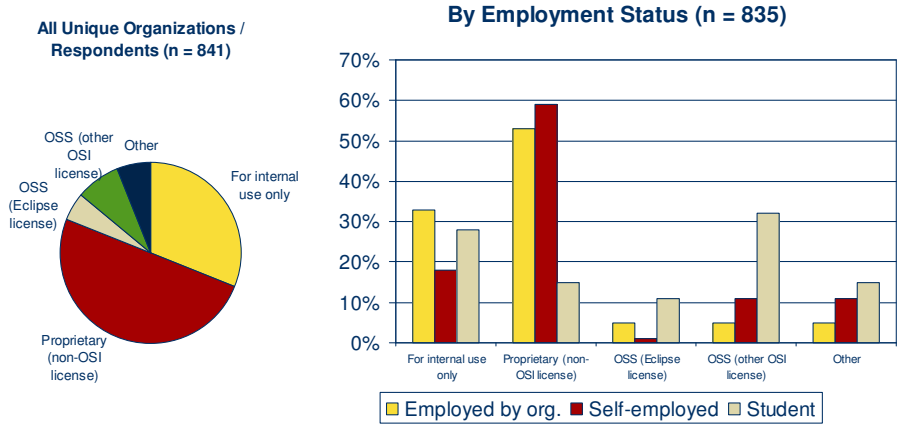
It is interesting to note that just 13% of unique organizations / respondents are developing open source software using Eclipse. As the adoption of open source software continues to increase, we expect this percentage to increase.

Please note that this question did not allow respondents to select more than one response. Some respondents commented that they are in fact developing multiple software applications that are licensed differently. These responses are captured in the “Other” category. Another common response captured as “Other” is where Eclipse is being used to develop software for academic purposes (e.g. to teach).

Type of License of Eclipse-built Software (cont.)

IDC Analyze the Future

Q29. What type of software are you (is your organization) developing using Eclipse software?

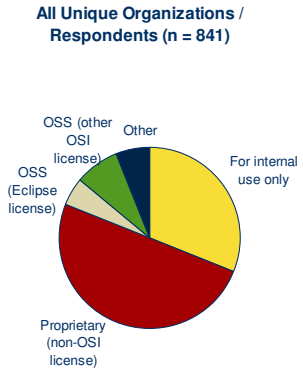


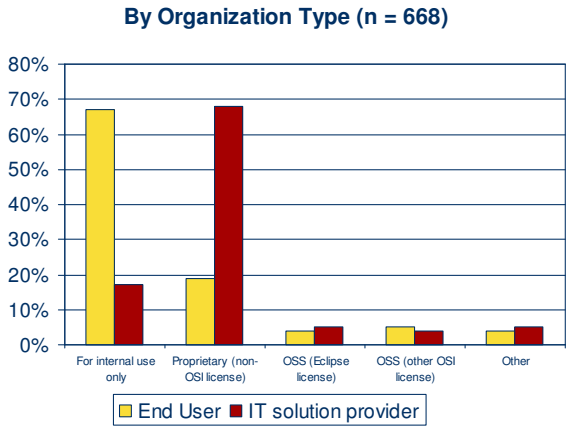
A higher proportion of students are writing OSS using Eclipse than the other two groups. The majority (almost 60%) of self-employed respondents are writing proprietary code, which is interesting because this group is also more inclined to make money from their Eclipse-based software.

Type of License of Eclipse-built Software (cont.)

IDC Analyze the Future

Q29. What type of software are you (is your organization) developing using Eclipse software?



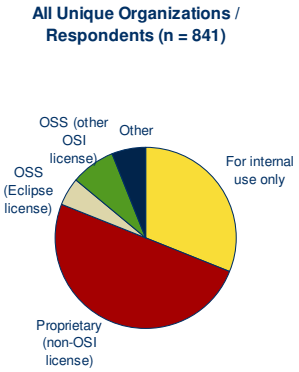


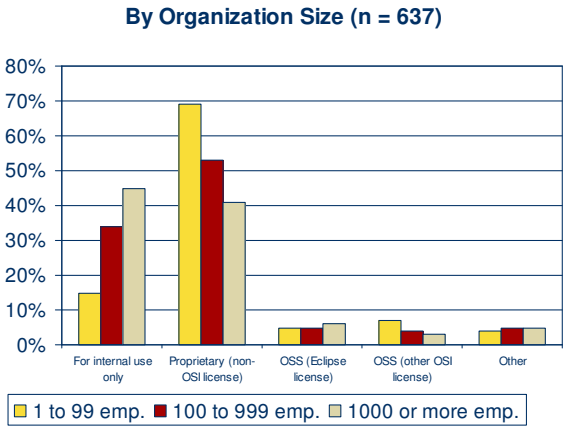
No surprise here – the majority of respondents from end user organizations (67%) are using Eclipse to develop software for internal use only, while the majority of IT solution providers (68%) are developing proprietary software.

Type of License of Eclipse-built Software (cont.)

IDC Analyze the Future

Q29. What type of software are you (is your organization) developing using Eclipse software?



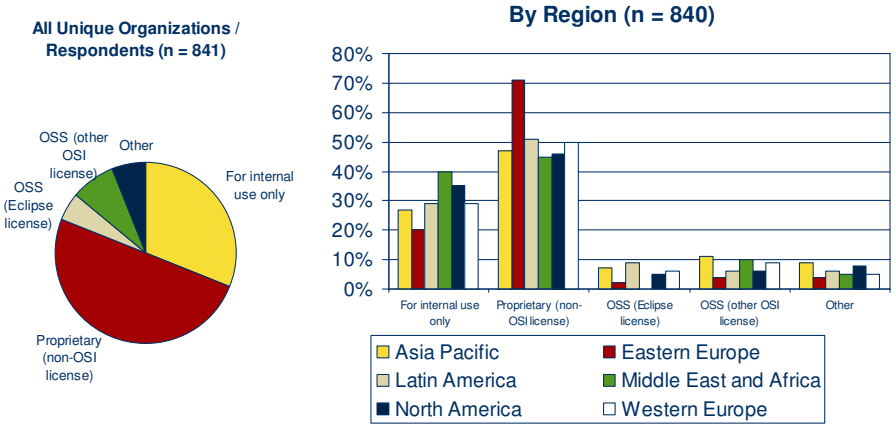


A higher proportion of large companies develop software for internal use, while a higher proportion of small companies develop proprietary software.

Type of License of Eclipse-built Software (cont.)

IDC Analyze the Future

Q29. What type of software are you (is your organization) developing using Eclipse software?

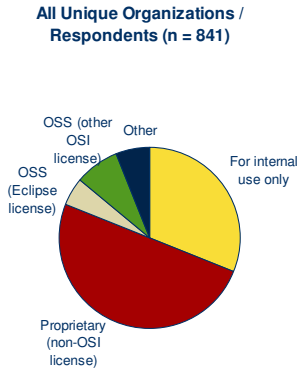


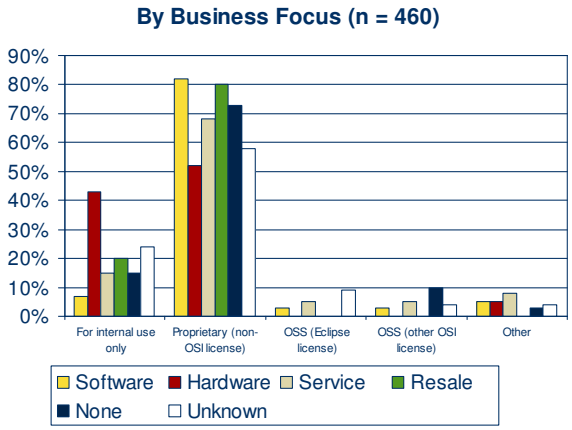
Respondents from Eastern Europe stand out from the rest of the respondents as developing more proprietary software using Eclipse.

Type of License of Eclipse-built Software (cont.)

IDC Analyze the Future

Q29. What type of software are you (is your organization) developing using Eclipse software?





Looking at the subset of organizations that are IT solution providers, all of them with the exception of hardware-focused organizations have a lower proportion that are developing software using Eclipse for internal use only than the total sample, but software-focused organizations stand out as the group having the highest proportion (82%) of organizations developing proprietary software.

Business Models For Making Money from Eclipse

IDC Analyze the Future

Q30. Which of the following possible business models describes your (organization's) approach for generating revenue from products and/or services tied to your (organization's) usage of Eclipse software? (select all that apply):

Business Model	Revenue-generating Product or Service
Offer a standalone packaged product of Eclipse software, and charge for product-specific services to certify and/or support the product	Packaged Eclipse product
Sell a development tool that embeds, extends and enhances Eclipse software	Tool embedding Eclipse
Sell a software application (other than a development tool) that embeds Eclipse software	Application embedding Eclipse
Sell a software application built with Eclipse software (where Eclipse software is not embedded in the application)	Application built with Eclipse
Sell a software product later on as an upgrade to Eclipse software	Software upgrade
Bundle Eclipse software with non-Eclipse software as a comprehensive solution, and charge for the solution	Bundled software solution
Embed Eclipse software in a hardware product, where the Eclipse brand is hidden, and sell the hardware	Hardware embedding Eclipse
Bundle Eclipse software with a hardware product, where the Eclipse brand is revealed, and sell the hardware/software combination	Bundled hardware product
Sell Eclipse-based software as a service over the internet (software-as-a-service model)	Eclipse-based SaaS
Sell implementation, integration, training, and/or other services related to Eclipse software	Related services

This table shows the options provided to the survey respondents to answer our question on business models, together with the labels we use to describe the revenue-generating product or service associated with each business model. We use these labels in following charts.

Business Models For Making Money from Eclipse (cont.)

IDC Analyze the Future

Q30. Which of the following possible business models describes your (organization's) approach for generating revenue from products and/or services tied to your (organization's) usage of Eclipse software? (select all that apply):

Organizations / Respondents Looking to Make Money Using Eclipse (n = 198)

Revenue-generating Product or Service (reflecting the Business Model)	% of Respondents
Application built with Eclipse	54.5%
Application embedding Eclipse	26.8%
Tool embedding Eclipse	21.2%
Related services	20.7%
Packaged Eclipse product	19.7%
Don't know	11.1%
Bundled software solution	10.1%
Eclipse-based SaaS	5.6%
Software upgrade	4.5%
Other	4.0%
Bundled hardware product	2.5%
Hardware embedding Eclipse	0.5%

Note: 80 of 198 respondents (40%) selected more than one business model.

Currently the most popular business model in use by organizations in this sample of the Eclipse community is to sell a software application built with Eclipse software, where Eclipse is not embedded in the application. It is used by just over half (55%) of the organizations that are looking to make money using Eclipse. However, several other business models are in use by at least 20% of these respondents, and we note that 40% of the respondents selected more than one business model. To IDC, this indicates that there is still much experimentation occurring around the best way to make money using Eclipse. Having said that, the most common business models for these respondents are also ones that, with the exception of related services, do not leverage other products/services as the primary revenue generators.

The fact that the top three business models involve selling software makes sense given our earlier observation that software-focused organizations have the highest proportion (82%) of organizations developing proprietary software. This proprietary software is then eligible for them to sell and generate revenue.

Business Models For Making Money from Eclipse (cont.)

IDC Analyze the Future

Q30. Which of the following possible business models describes your (organization's) approach for generating revenue from products and/or services tied to your (organization's) usage of Eclipse software? (select all that apply):

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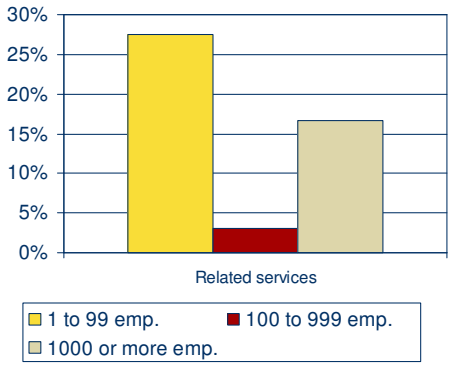
By Organization Size (n = 144)

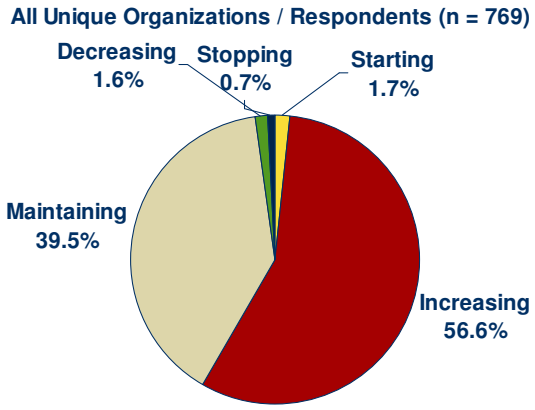


The only significant difference in the respondents' choices of business models when segmenting by various dimensions occurs with "Related services" segmented by organization size: it appears that this business model is primarily the choice of small companies (1 to 99 employees) and large companies (1000 or more employees), but is significant in its absence as a choice by mid-sized companies (100 to 999 employees). We don't know for sure why this is the case, but we would guess that smaller companies are reacting to a need for services around Eclipse-based software and see this as a business opportunity, while the services divisions of large companies may be reacting to their companies' software development initiatives with Eclipse and meeting demand for the provision of attendant services – i.e. more reactive than proactive. This is just speculation at this point.

Plans for Eclipse

IDC Analyze the Future

Q31. What are your (organization's) plans for usage of Eclipse software in the next 12 months relative to your current usage?

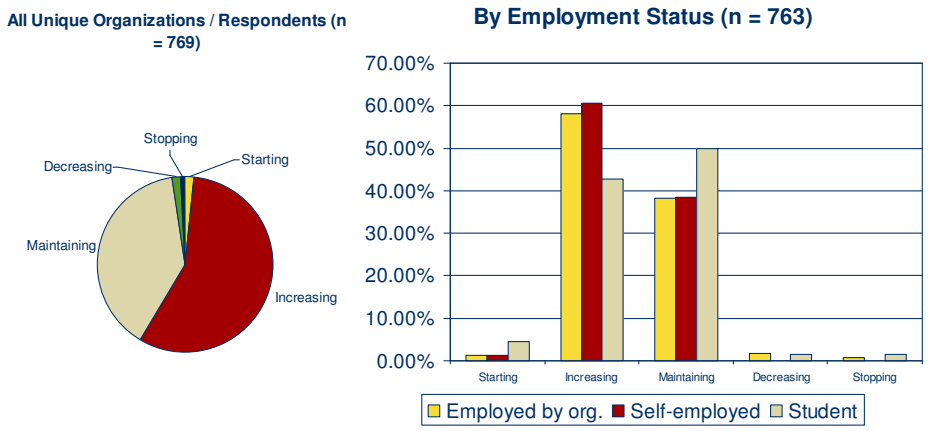


The vast majority (96%) of organizations / respondents plan to increase or maintain their usage of Eclipse in the next 12 months.

Plans for Eclipse (cont.)

IDC Analyze the Future

Q31. What are your (organization's) plans for usage of Eclipse software in the next 12 months relative to your current usage?

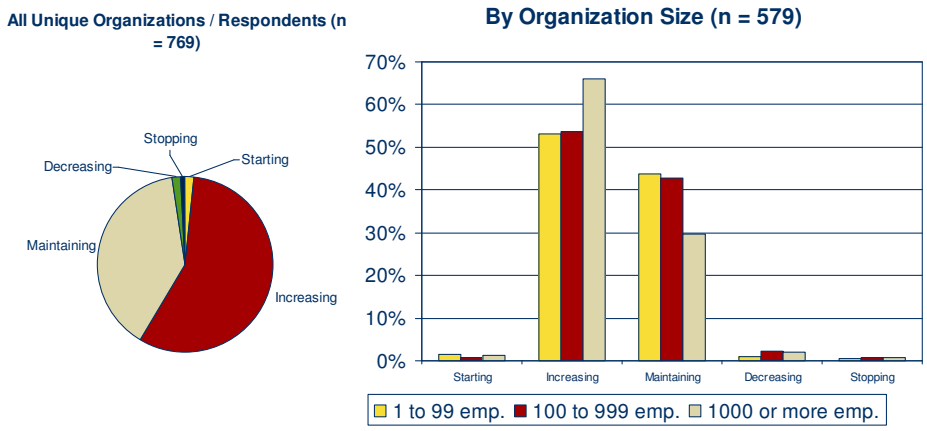


More students, on a proportional basis, indicate they plan to maintain their usage of Eclipse as opposed to increase their usage, when compared with organizations and self-employed respondents.

Plans for Eclipse (cont.)

IDC Analyze the Future

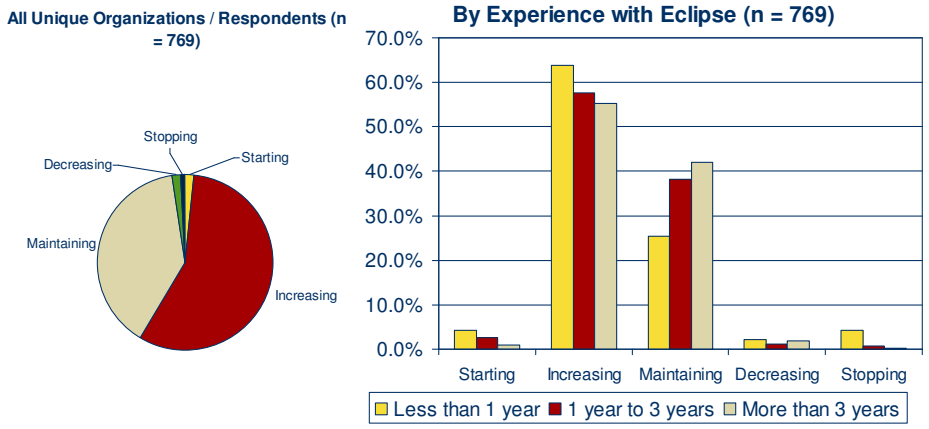
Q31. What are your (organization's) plans for usage of Eclipse software in the next 12 months relative to your current usage?



Large organizations (1000 or more employees) in particular plan to increase their usage of Eclipse in the next year.

Plans for Eclipse (cont.)

Q31. What are your (organization's) plans for usage of Eclipse software in the next 12 months relative to your current usage?

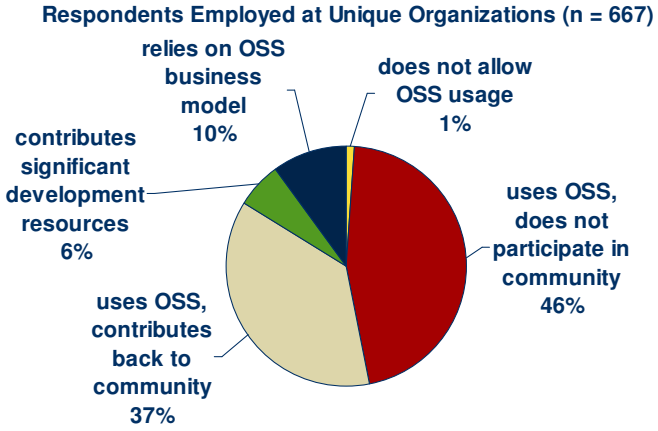


Inexperienced respondents' organizations tend to be at either end of the spectrum with respect to plans for Eclipse usage in the next 12 months: a higher percentage are planning to both start/increase usage or decrease/stop usage. For these respondents, as experience with Eclipse increases, the likelihood of organizations planning to maintain their usage of Eclipse also increases.

Organizational Approach to OSS

IDC Analyze the Future

Q32. Please select the statement that best describes your organization's approach to open source software in general. My organization…?

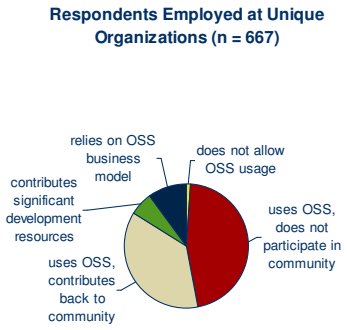


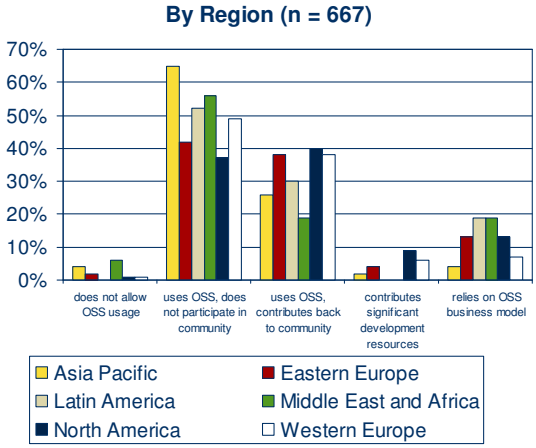
Looking more generally at the organization's approach to open source software (OSS), almost half (46%) use OSS but do not participate in the community. However, 10% of respondents' organizations have a business model that relies on OSS for their success, which is quite high and reflects the commercial orientation of Eclipse organizations in general. Only 1% of respondents' organizations do not allow the usage of OSS, but this should not be viewed as indicative of the overall population of organizations, since we are dealing with a heavily biased sample of users of Eclipse, which is OSS.

Organizational Approach to OSS (cont.)

IDC Analyze the Future

Q32. Please select the statement that best describes your organization's approach to open source software in general. My organization…?





Relative to the overall proportion of organizations that use OSS but do not participate in an OSS project community (46%), organizations in Asia Pacific stand out with a particularly high percentage (65%).

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