

# CLIMATE CHANGE

User Perspectives on the Impact of Economic Conditions on  
Open Source Software Adoption

**CAOS** | COMMERCIAL  
ADOPTION OF  
OPEN SOURCE

## 2009 USER SURVEY RESULTS

DECEMBER 2009

## ABOUT THE 451 GROUP

The 451 Group is a technology analyst company. We publish market analysis focused on innovation in enterprise IT, and support our clients through a range of syndicated research and advisory services. Clients of the company — at vendor, investor, service-provider and end-user organizations — rely on 451 insights to do business better.

## ABOUT TIER1 RESEARCH

Tier1 Research covers consumer, enterprise and carrier IT services, particularly hosting, colocation, content delivery, Internet services, software-as-a-service and enterprise services. Tier1's focus is on the movement of services to the Internet — what they are, how they are delivered and where they are going.

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The following survey results on the topic of open source cost savings are presented in association with the 451 CAOS report 'Climate Change: User Perspectives on the Impact of Economic Conditions on Open Source Software Adoption,' which is available now.

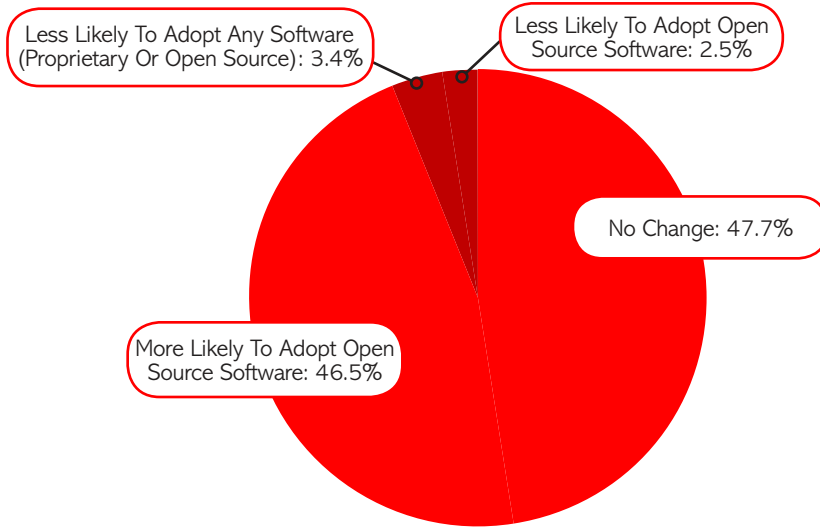
For more information on how to purchase the report, please contact: [sales@the451group.com](mailto:sales@the451group.com)

The purpose of this survey was to collect information on the role of cost savings in open source software adoption and to better understand how customers see it.

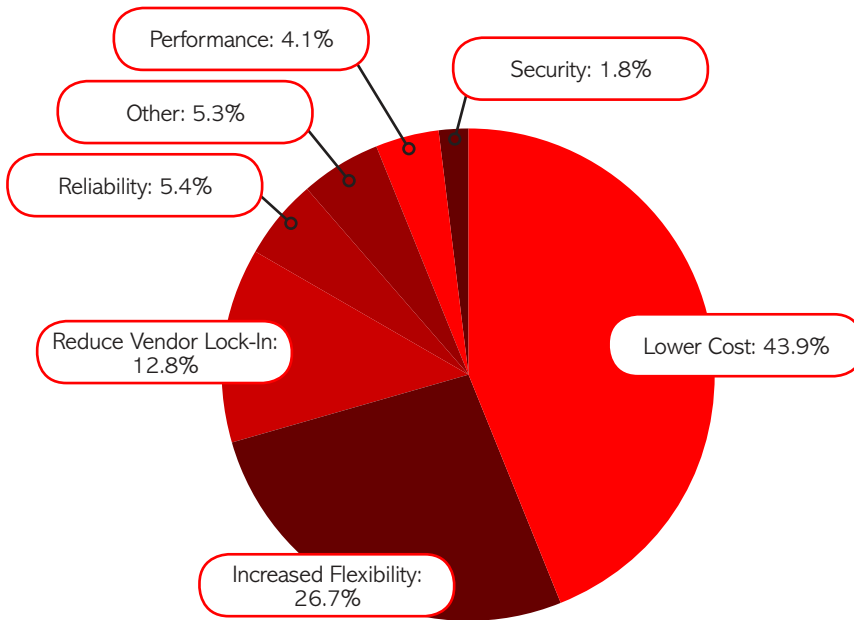
## KEY FINDINGS

- Current economic conditions and the need to save money are driving increased interest in open source software, at least among those that have already adopted open source to some extent: 46.5% of the 1,711 open source users we surveyed said they were more likely to adopt open source software in light of current economic conditions. Slightly more respondents (47.7%) said the economic climate had not changed their attitude toward open source. However, given that they were already open source users, this should not be seen as a negative response. Only a handful of respondents were putting off adoption of new software – open source or proprietary – in light of economic conditions.
- Lower cost is still the top reason an organization decides to use open source software, but flexibility has become a more significant factor in recent years, and is now cited as the biggest post-adoption benefit of open source. Meanwhile, vendor lock-in appears to have become less of a concern. With nearly half of our survey respondents citing cost, we believe it will continue to be the leading factor driving consideration of open source. While flexibility, mitigation of vendor lock-in and even reliability will continue to be significant factors, the cost element is reinforced by the time-to-market and time-to-value advantages of open source software.
- Open source software is undoubtedly delivering cost savings to most organizations that choose to adopt it. Survey respondents indicated that open source is meeting cost-savings expectations more than 50% of the time and is exceeding those expectations more than 25% of the time. Furthermore, the percentage of customers who said that open source came in below expectations on cost was less than 5% among survey respondents.
- Software licenses and license maintenance costs continue to lead as the top sources of savings from open source. Beyond the traditional cost savings of open source licensing that allows unlimited use or users, we are seeing additional licensing advantages, such as the ability to offer and use software on-premises or via clouds or other services without concern over cost or licensing obligations.

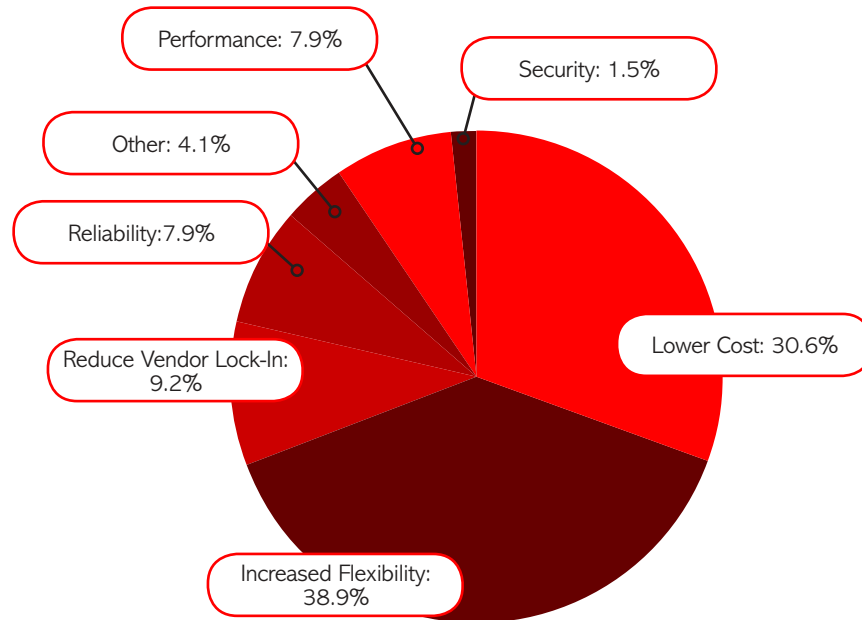
**HAS THE CURRENT ECONOMIC CLIMATE IMPACTED YOUR COMPANY'S ATTITUDE TOWARDS OPEN SOURCE SOFTWARE?**



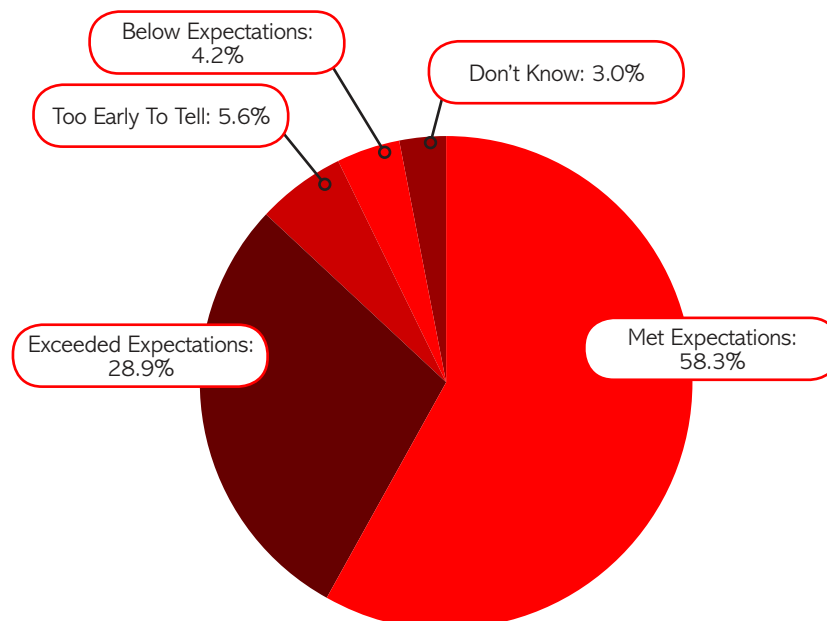
**WHAT WAS THE PRIMARY REASON THAT YOUR ORGANIZATION DECIDED TO USE OPEN SOURCE SOFTWARE?**



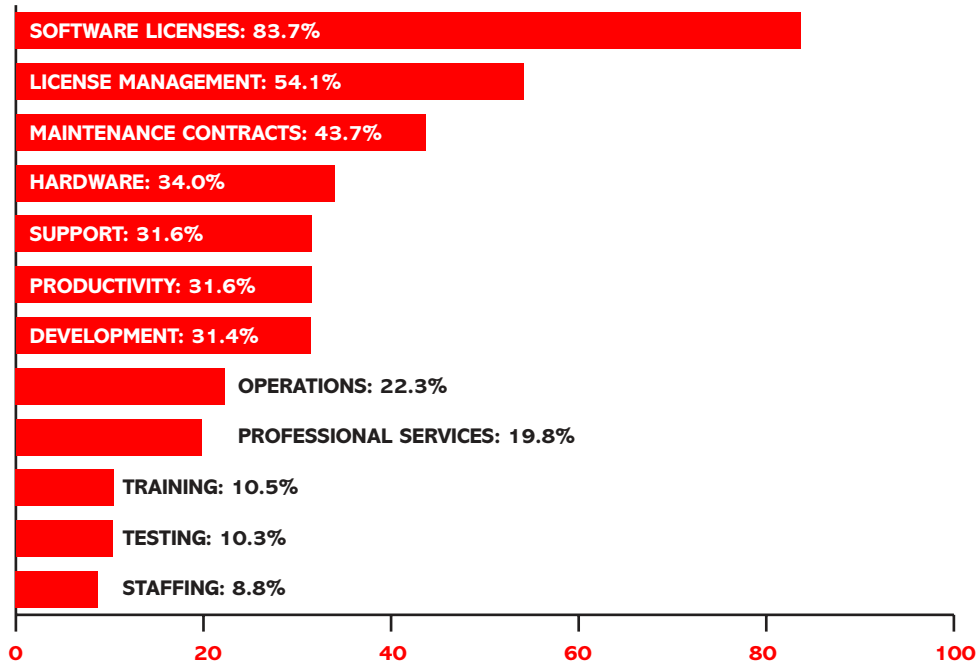
**AFTER YOUR ORGANIZATION ADOPTED OPEN SOURCE SOFTWARE, WHAT WAS THE PRIMARY BENEFIT OF ITS USE?**



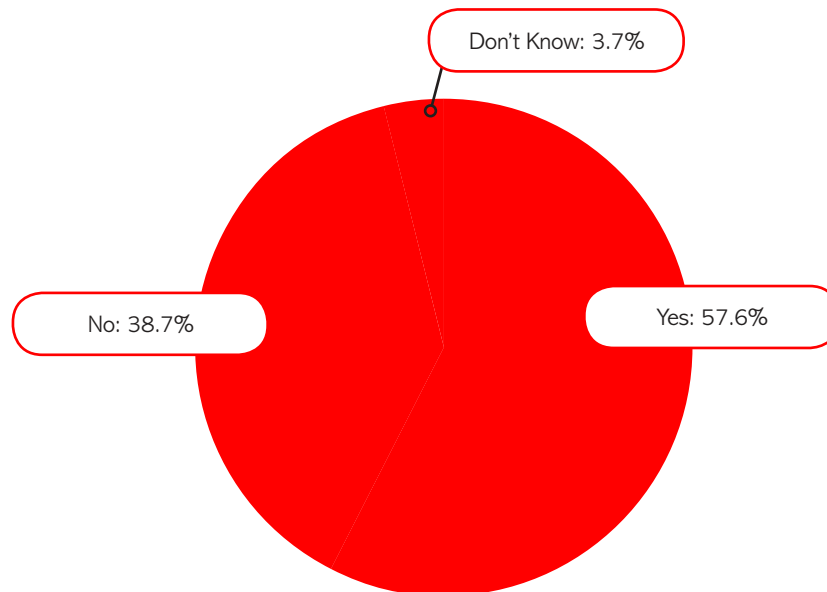
**TO WHAT EXTENT WERE COST SAVINGS ACHIEVED THROUGH THE USE OF OPEN SOURCE SOFTWARE?**



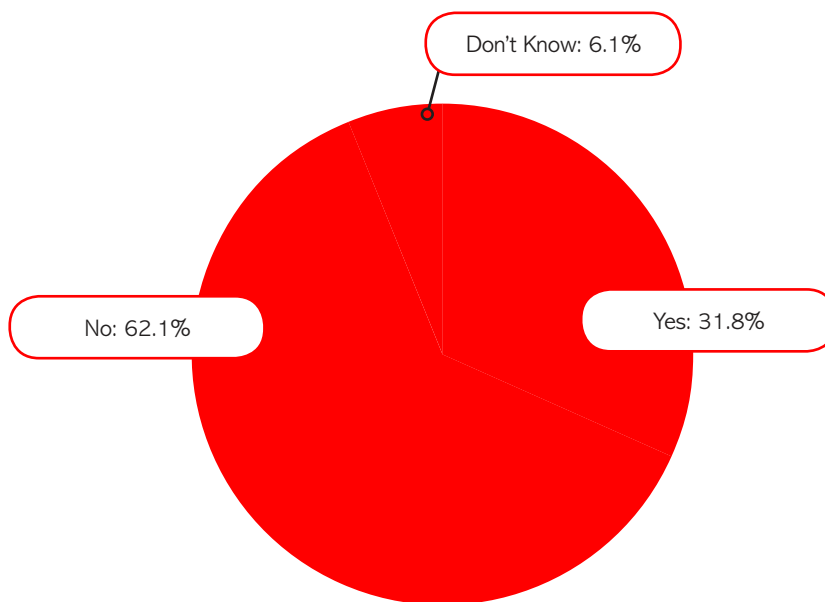
WHERE DO YOU BELIEVE THE COST SAVINGS WILL COME FROM/DID COME FROM?



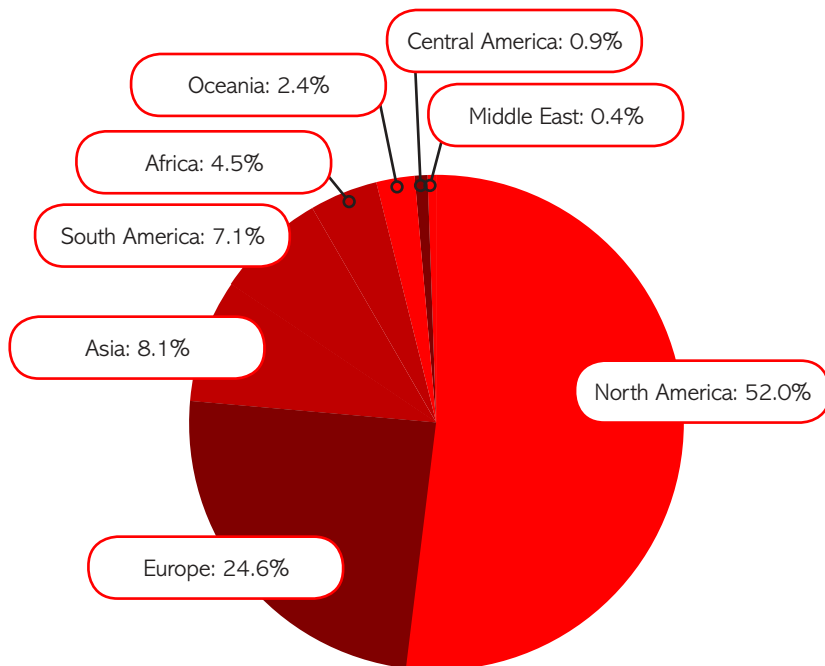
DOES YOUR COMPANY TRACK THE USAGE OF OPEN SOURCE SOFTWARE IN DEVELOPMENT PROJECTS?



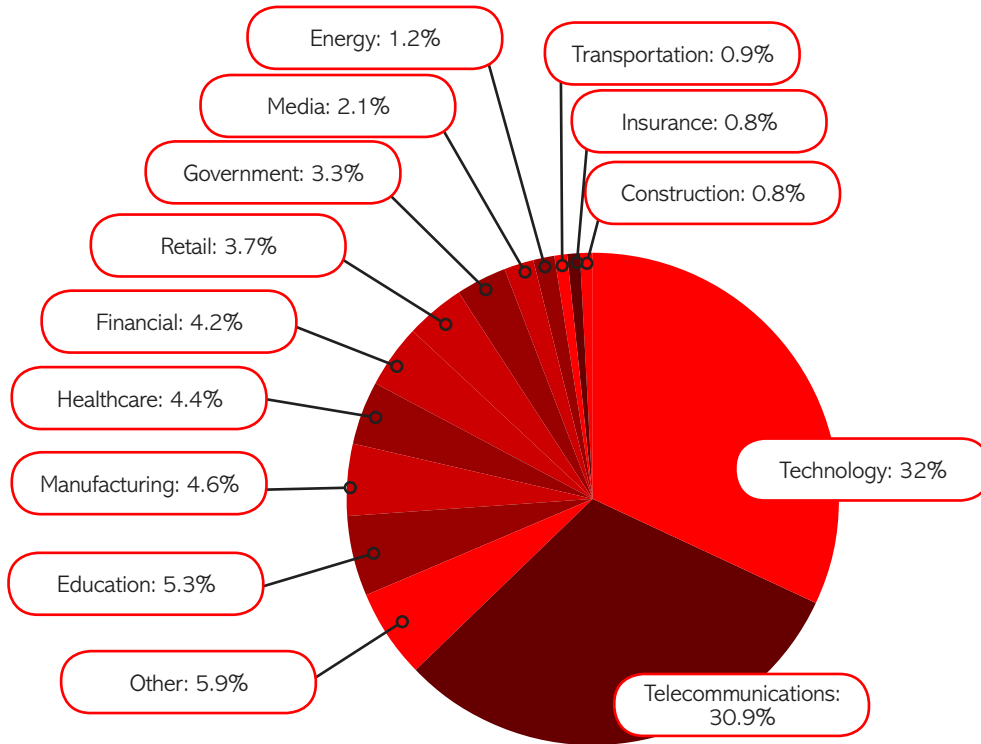
### DOES YOUR COMPANY HAVE POLICIES AND/OR GUIDELINES FOR CONTRIBUTING TO OPEN SOURCE SOFTWARE?



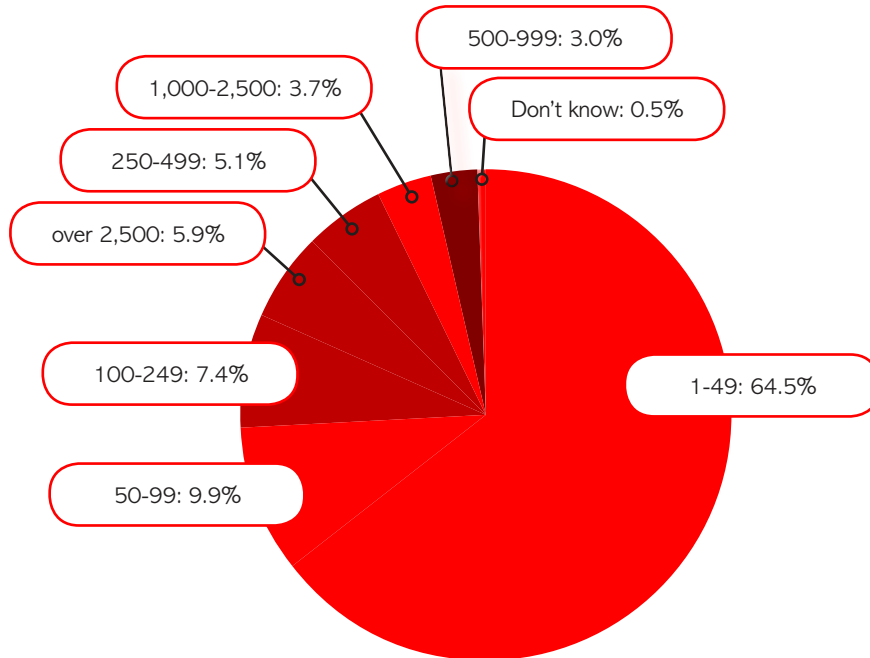
### SURVEY RESPONDENTS BY COMPANY HEADQUARTERS



**SURVEY RESPONDENTS BY VERTICAL MARKET**



**SURVEY RESPONDENTS BY NUMBER OF EMPLOYEES**





# SURVEY DETAILS

## SURVEY METHODOLOGY AND RESPONDENT DETAILS

In association with this report, we conducted a survey on the topic of open source cost savings. The purpose of this survey was to collect information on the role of cost savings in open source software adoption and to better understand how customers see it.

With the help of more than two dozen open source software vendors, we surveyed a total of 1,711 respondents representing organizations of various sizes in various industries and geographies around the globe.

## VENDOR-ASSISTED, BUT INDEPENDENT

In order to reach as wide a sample of open source users as possible, for this year's survey we asked a number of vendors to send the survey to their customers on our behalf. Nearly 30 vendors (both clients and non-clients of The 451 Group) agreed to do so.

In keeping with one of the core principles of The 451 Group that our research is never sponsored, nor is it produced to promote a particular vendor's agenda, no vendors were involved in drafting the questions for the survey; no vendors were involved in the analysis performed on the results; and no vendors saw the results before they were published. We are nonetheless extremely grateful to the vendors that participated for enabling us to reach such a substantial survey sample, and they, like the users completing the survey, will be receiving a copy of the research results.

The vendors involved in distributing the survey to their customers were: Actuate, Adaptive Planning, Digium, DotNetNuke, EnterpriseDB, eZ Systems, Infobright, Jitterbit, KnowledgeTree, Likewise, MindTouch, MuleSoft, Nuxeo, Open-Xchange, Openbravo, OpenLogic, OpenNMS Group, OrangeHRM, Red Hat, Sourcesense, SourceForge, Squiz, Talend, Terracotta, xTuple and Zenoss.

## LIMITATIONS

There is of course a difference between open source users and customers of open-source-related vendors. Above all we were interested in the attitudes of paying customers, and we asked the vendors involved to send the survey to their customers, rather than prospects. Nevertheless, a respondent could be both a customer of one vendor and a non-paying user of another vendor's software. According to our analysis of the results, 16% of the respondents claimed not to be customers of any specific open-source-related vendor.

Since the respondents to the survey were already open source software users, the results are not to be taken as reflective of overall attitudes toward open source software. This was deliberate, since the aim was to assess the benefits of open source software from the point of view of those that have been through the process of selecting and adopting it. We believe the size of the sample provides a valuable view of attitudes toward open source software among a diverse group of users from a wide array of countries, company sizes and industries, and with various philosophical attitudes toward software licensing.

As with any survey, there is a danger that the questions being asked led the respondent toward a certain answer. Certainly the survey had a focus on attitudes about the cost of open source software adoption, which might have influenced responses toward the issue of cost. However, every attempt was made to keep the questions neutral and the choice of responses randomized.