

October, 2005

2005 Mission Critical Survey

Survey Report

IDC Quantitative Research Group
October, 2005

www.idc.com



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About This Survey Report

- Microsoft contracted IDC's Quantitative Research Group to conduct a survey of Information Technology (IT) organizations to assess the state of current practices towards mission critical applications. This presentation contains the weighted results of this survey.
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Objectives and Methodology

Objectives

The primary objectives of the study was to assess:

- What types of mission critical applications are in use
 - “Mission critical application” was left to the assessment of the respondent based on their knowledge of their company’s application portfolio, although email was excluded from possible choices
- What software platforms are used to build mission critical applications
- What operating environments are used to host mission critical applications
- The preferred provider for key components of the application platform such as application server, web services / SOA software, message queuing software, and other software categories
- Other important information relevant to mission critical applications such as role of standards and criteria for evaluating solutions

Objectives and Methodology

Survey Design

Survey questions were grouped into the following categories

- Screening
- Company/respondent profile
- Company-wide platform and operating environment
- Current primary project
- Standards
- Vendor Satisfaction

Objectives and Methodology

Sampling/Screening Criteria

Respondents were screened and interviewed via telephone

The following sampling/screening criteria were followed:

- Company size equal/greater than 1,000 employees
- Respondent must be IT decision maker, developer, or architect
- Respondent must be engaged in more than one software development activity
- Respondent must play leading role in integration or new software development
- Analyst or market research firms and IT providers were not surveyed

Objectives and Methodology

Survey Terminology and Definitions

Key Definitions used in the Mission Critical Survey (verbatim from the survey instrument)

- Mission critical Applications
 - “Business applications, excluding email, that would bring your company to a stop if they were not running. Mission critical applications are typically supported and managed by a central IT staff. Examples of such applications are airline reservation systems and order processing for a retail store chain.”
- Application Technology Platform
 - “The platform on which you build applications and application suites. Examples include J2EE, Microsoft .NET. Mainframes, and others.”
- Web Services
 - “...components which use SOAP, WSDL, UDDI, or other WS* standards.”
- Service Oriented Architecture
 - “Software topology where an application is built of programmatically accessible ‘black box’ business components, called services, and clients act as consumers of those services.”

Objectives and Methodology

Survey Terminology and Definitions

Key Respondent Role Definitions used in the Mission Critical Survey

- **IT Decision Maker**

- “Works in IT and has significant decision making authority related to technology purchases and operations”

- **Developer**

- “Works in the IT department with main responsibility to create software applications”

- **Architect**

- “Main responsibility is designing, specifying, or architecting applications”

Objectives and Methodology

Quotas, Weighting, and Confidence Limits

Quotas

- Worldwide quota met
- Regional quotas met
- Country quotas met with exception of Canada (surveys in India still in process)

Weighting

- Observations are weighted at the country level
- A country weight is its proportion of IT spending relative to the total IT spending of the 9 countries where surveys occurred

Confidence Limits

- Worldwide 95% Confidence limits (n=1,750) is +/- 2.3%
- Regional Segment 95% confidence limits (n=500-600) is +/- 4.0%
- Country 95% confidence limits (n=200) is +/-7.0%

Objectives and Methodology

Minimum Quotas and Completes

Geography (Quota)	IT Decision Maker	Developer	Architect	Total (Quota)
United States (100)	174	145	136	455 (350)
Canada (30)	28	9	8	45 (150)
NA Segment (130)	202	154	144	500 (500)
Germany (50)	104	55	50	209 (200)
France (50)	103	52	47	202 (200)
United Kingdom (50)	100	49	51	200 (200)
Europe Segment (150)	307	156	148	611 (600)
Japan (50)	93	53	54	200 (200)
China (50)	75	53	72	200 (200)
South Korea (50)	61	74	65	200 (200)
India (50)	91	67	49	207 (200)
Asia Segment (200)	320	247	240	807 (600)
Total (430)	829	557	532	1,918 (1,700)

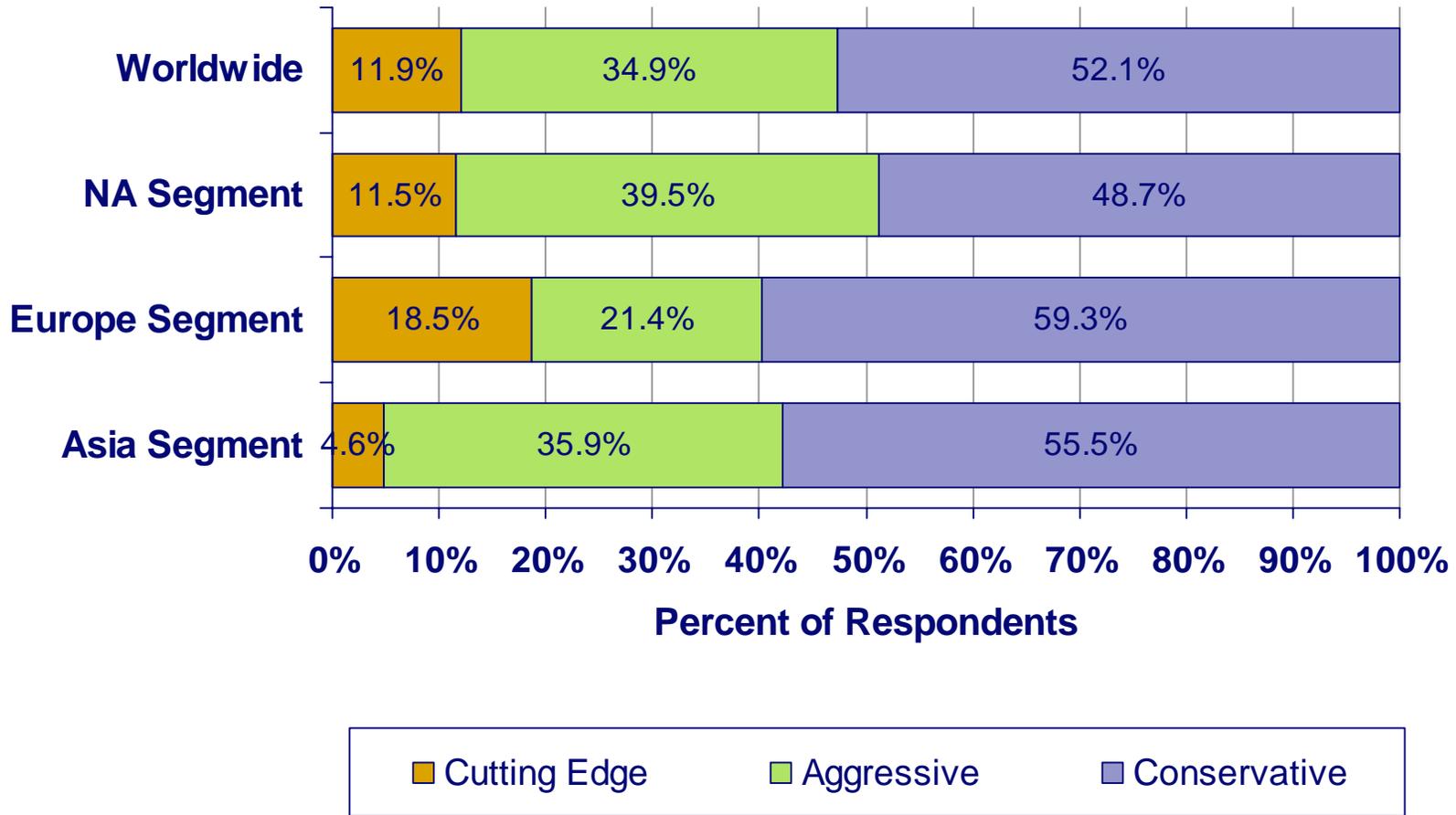
Application Platform Analysis

Application Platform Environment

- Q1: Company approach to technology
- Q3: Mission critical application types
- Q5: Mission critical application distribution across OS
- Q7: Current application platforms in use
- Q8: Current primary application platform
- Q9: Future primary application platform
- Q10: Current primary vendor for application platform
- Q11: Future primary vendor for application platform

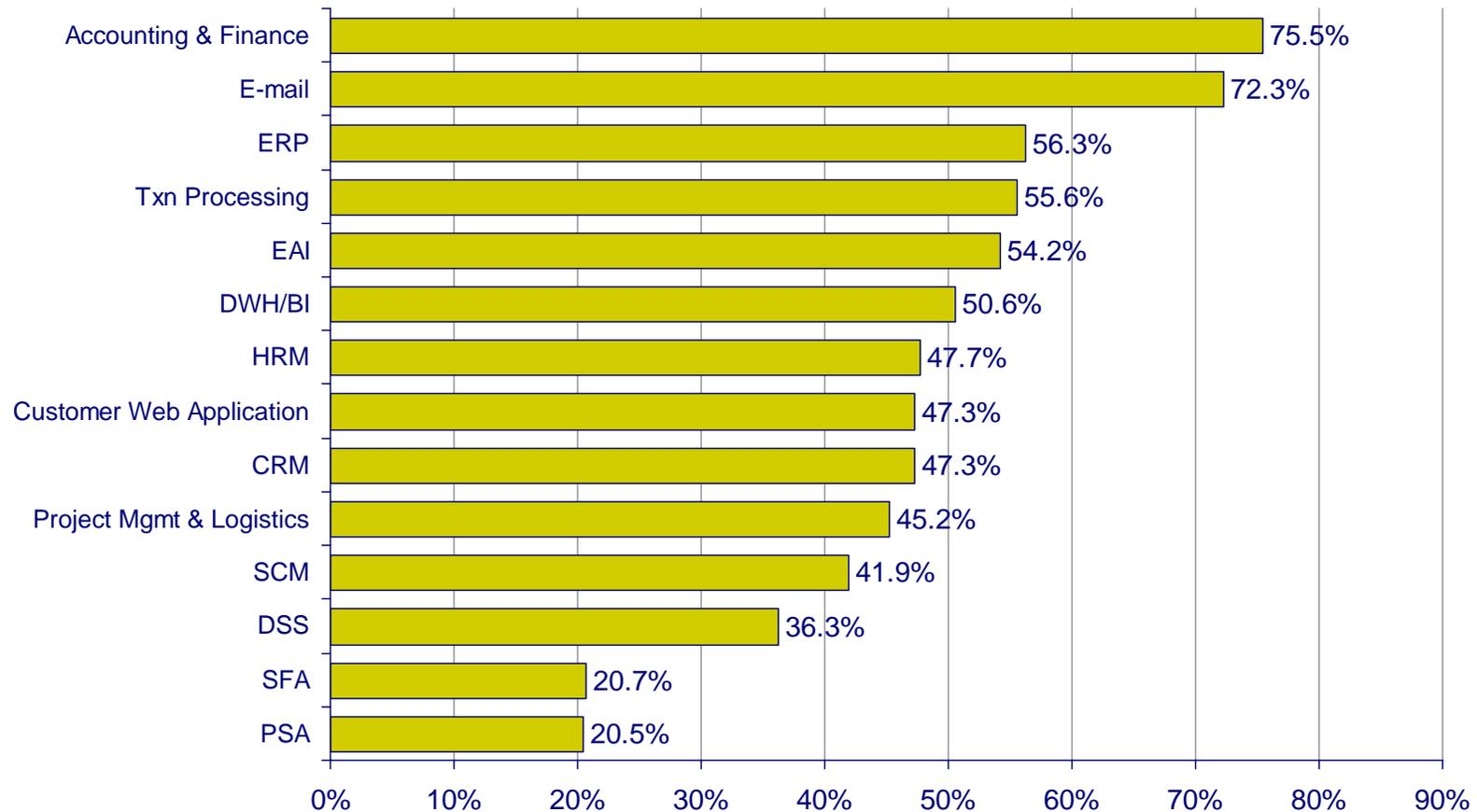
Company Approach to Technology Worldwide and Regional Segments

Q1: How would you characterize your company's approach to technology development?



Mission Critical Application Types Worldwide

Q3: Which of the following application types does your company consider to be mission-critical? *(Multiple response)*

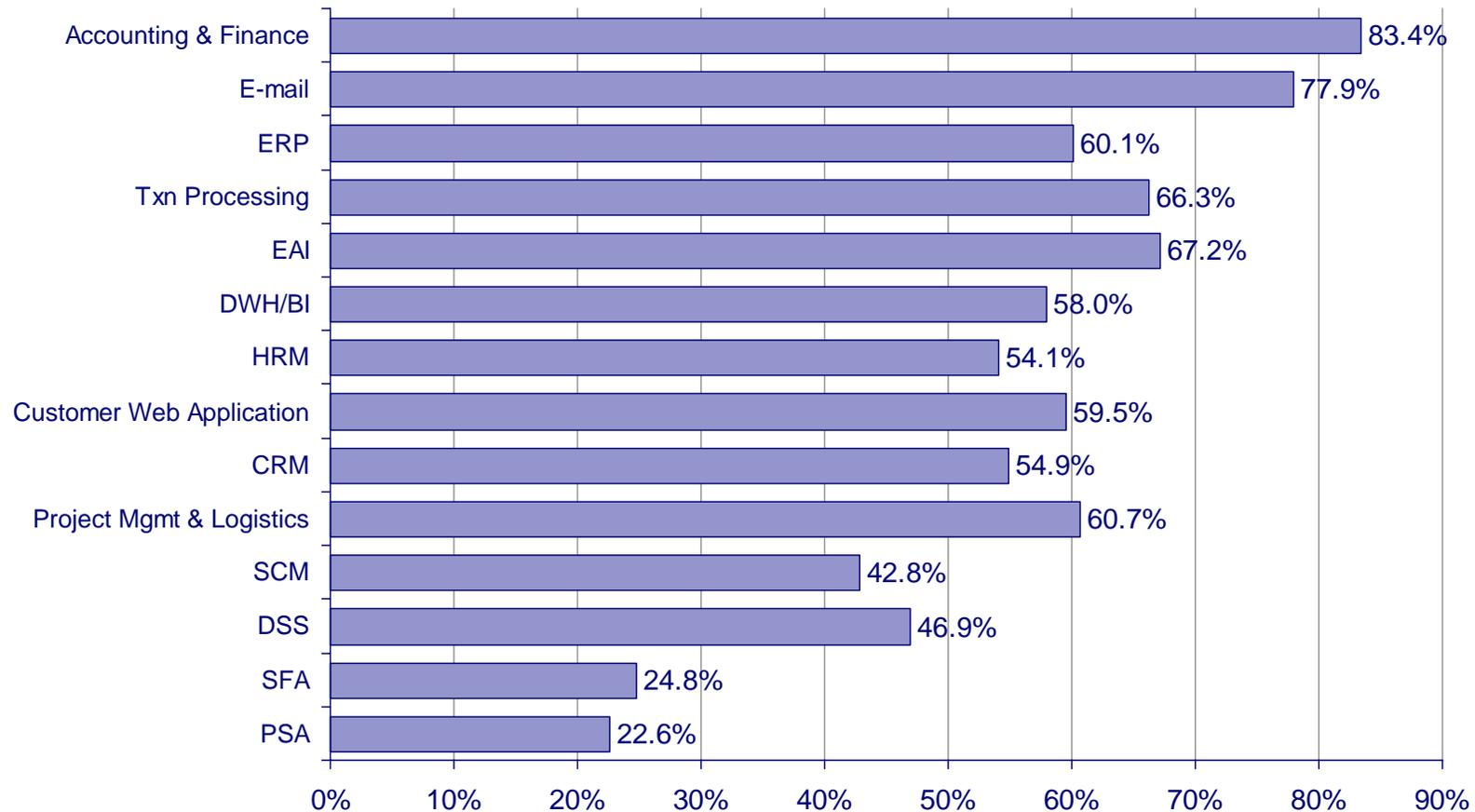


Percent of Respondents - Worldwide

Mission Critical Application Types

NA Segment

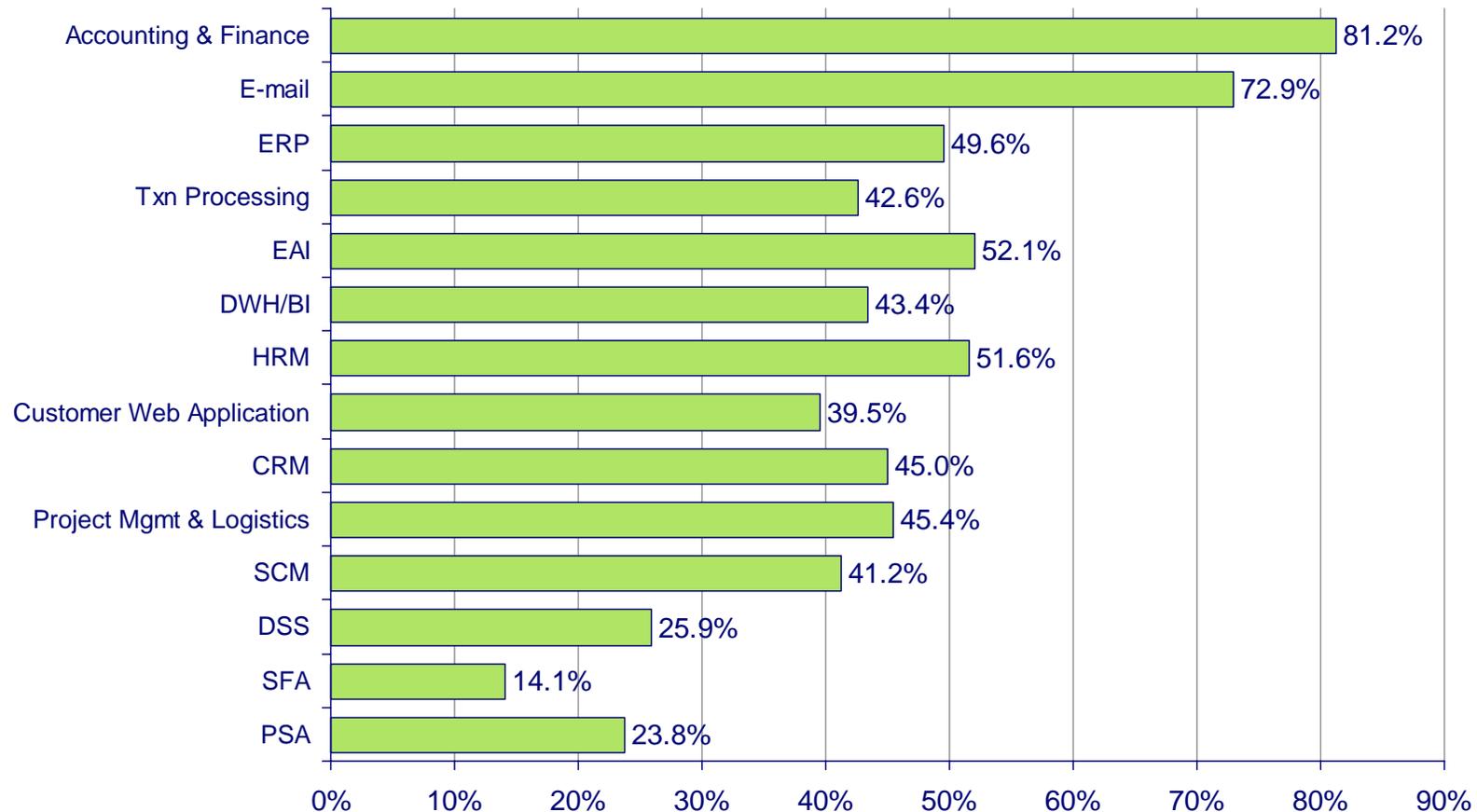
Q3: Which of the following application types does your company consider to be mission-critical? *(Multiple response)*



Percent of Respondents - NA Segment

Mission Critical Application Types Europe Segment

Q3: Which of the following application types does your company consider to be mission-critical? *(Multiple response)*

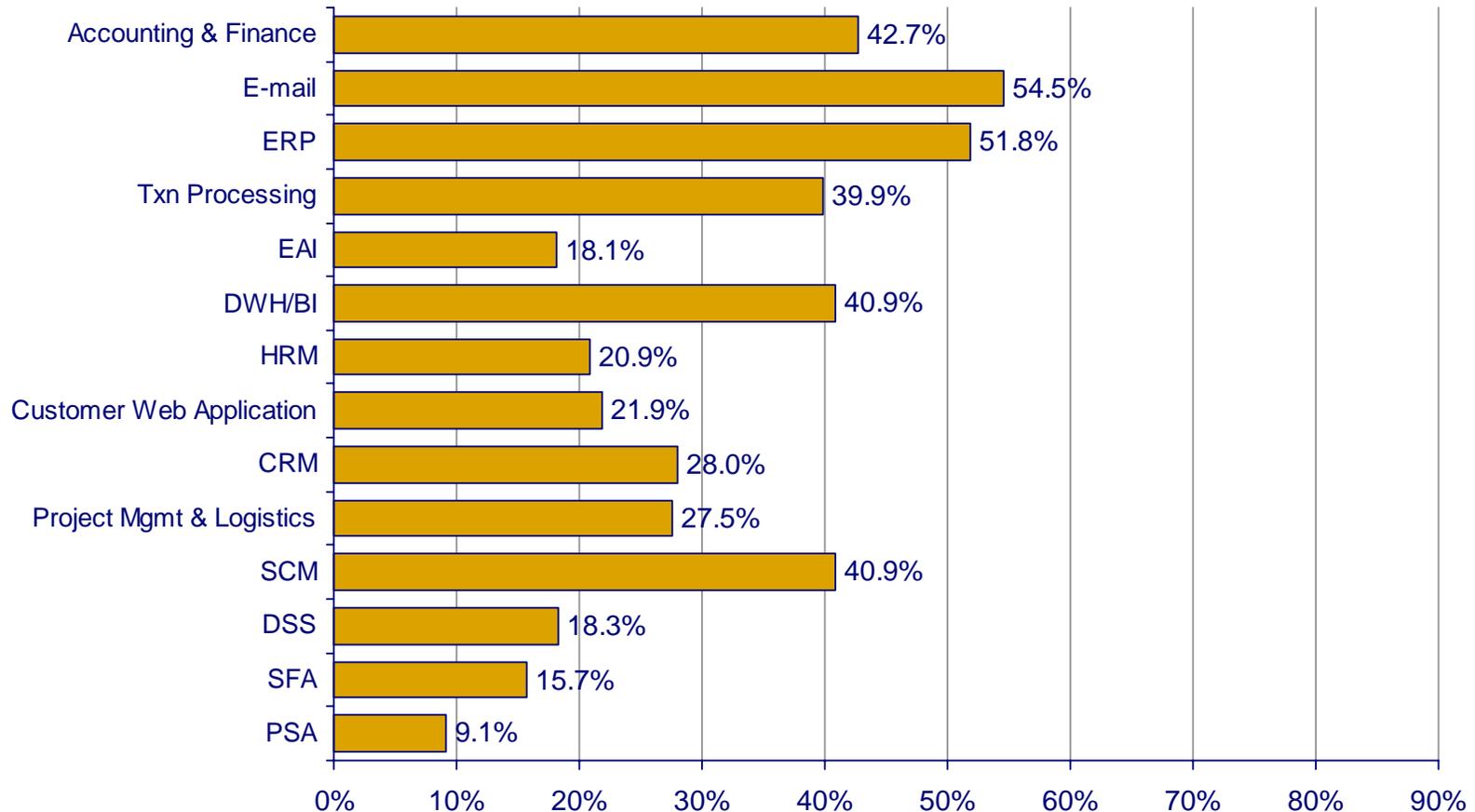


Percent of Respondents - Europe Segment

Mission Critical Application Types

Asia Segment

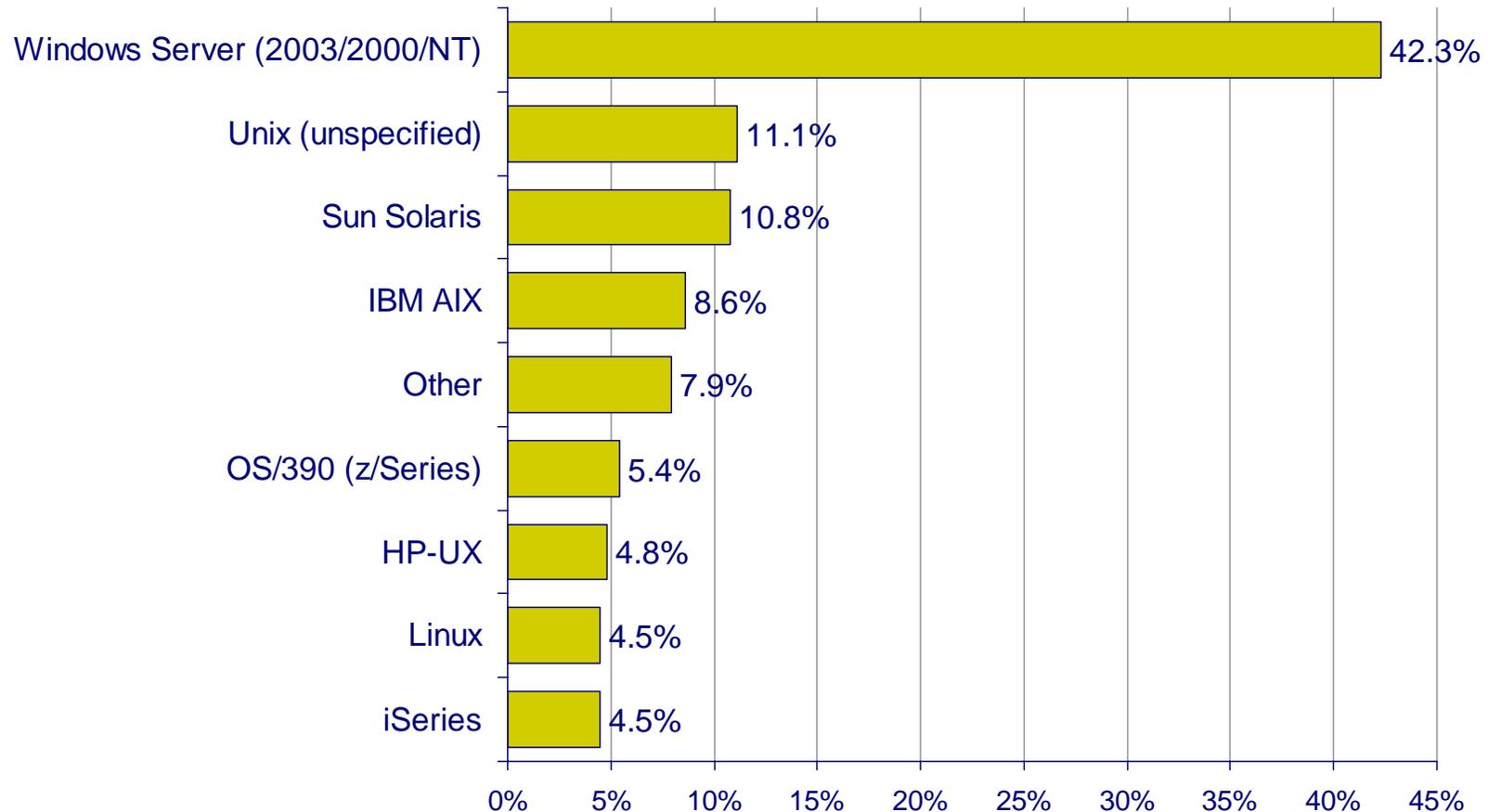
Q3: Which of the following application types does your company consider to be mission-critical? *(Multiple response)*



Percent of Respondents - Asia Segment

Mission Critical Application Distribution Worldwide

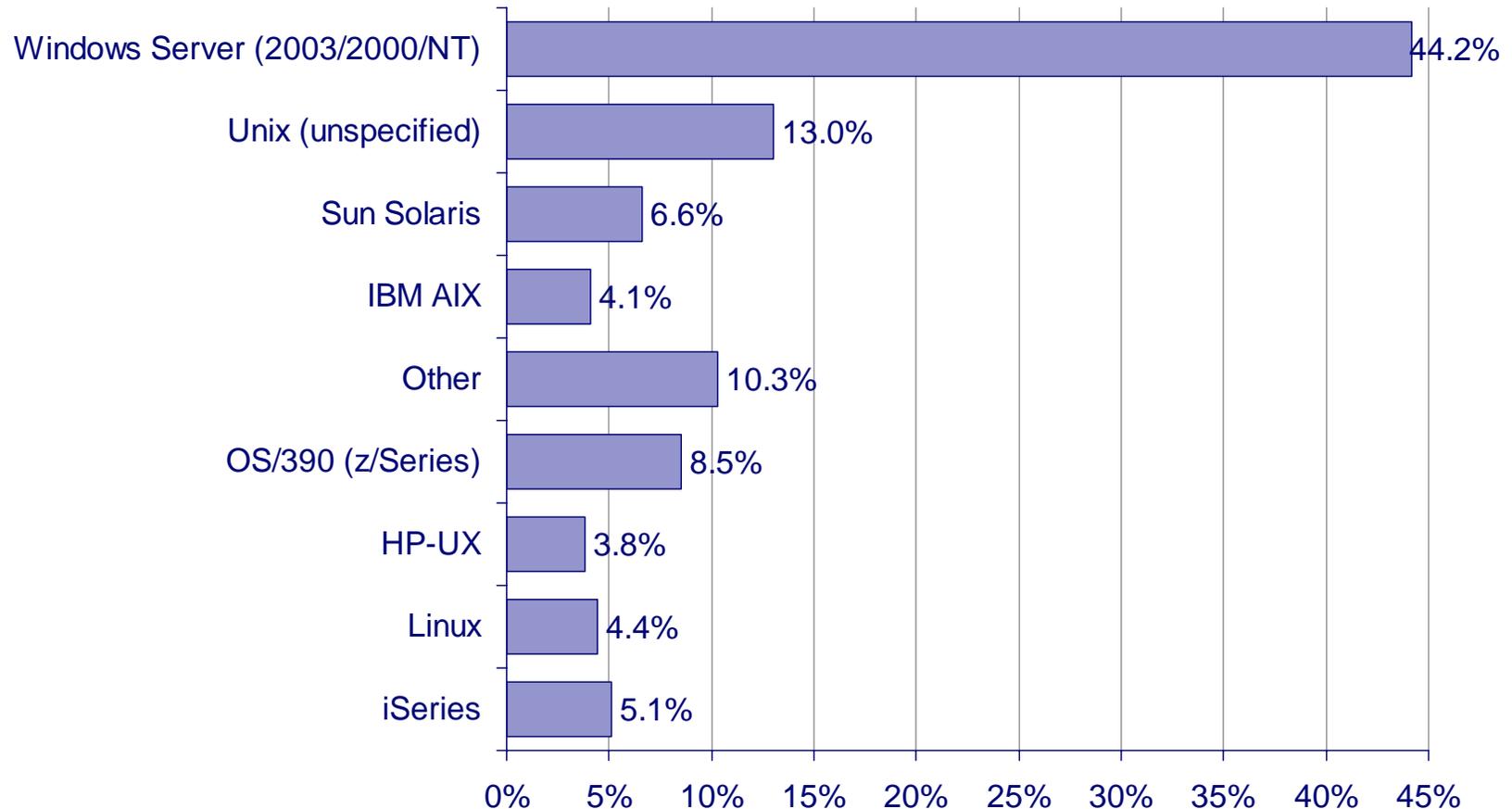
Q5. What percentage of your mission critical applications run on...?
(Multiple response adding to 100%)



Mean Percent - Worldwide

Mission Critical Application Distribution NA Segment

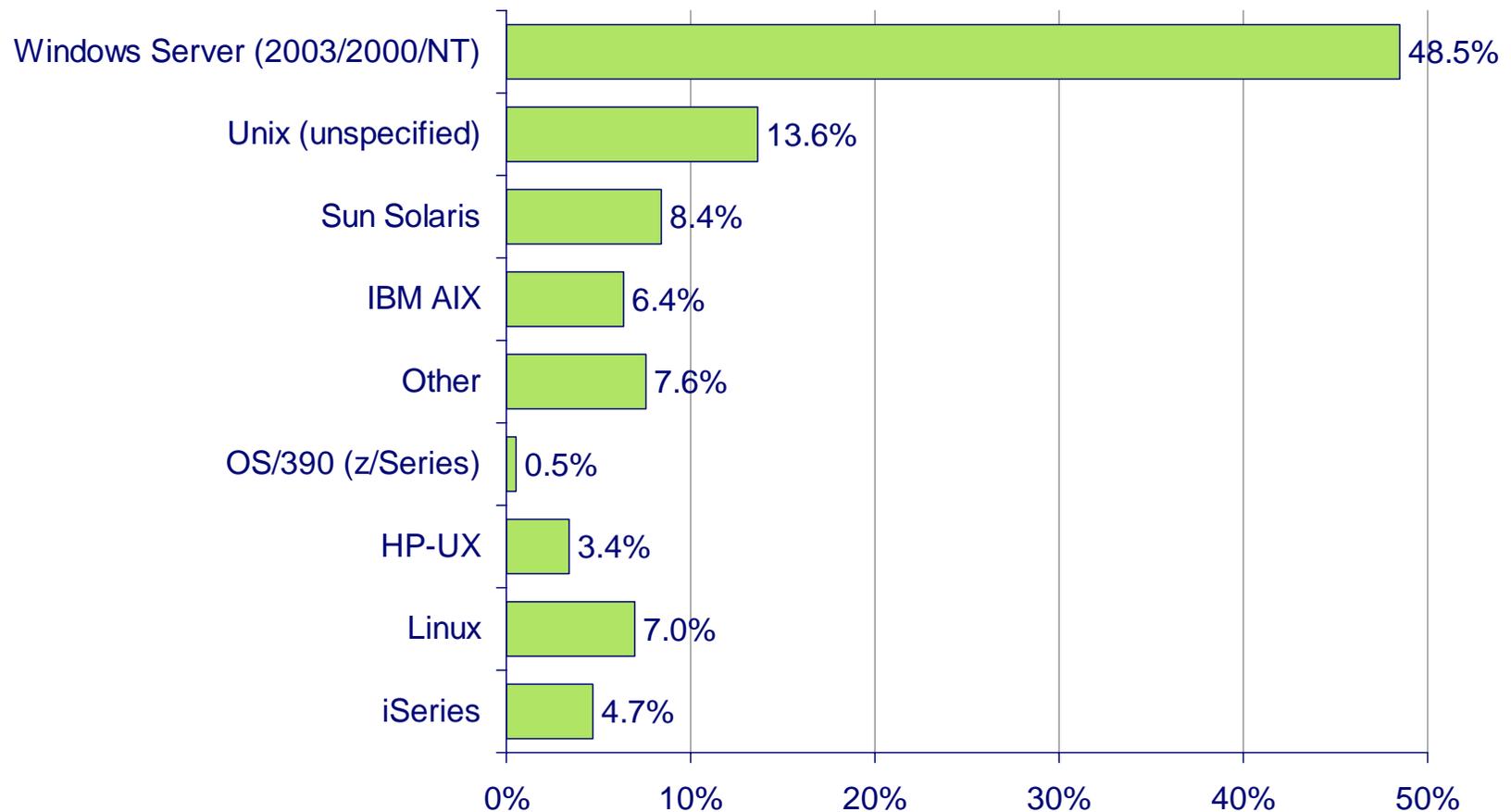
Q5. What percentage of your mission critical applications run on...?
(Multiple response adding to 100%)



Mean Percent - NA Segment

Mission Critical Application Distribution Europe Segment

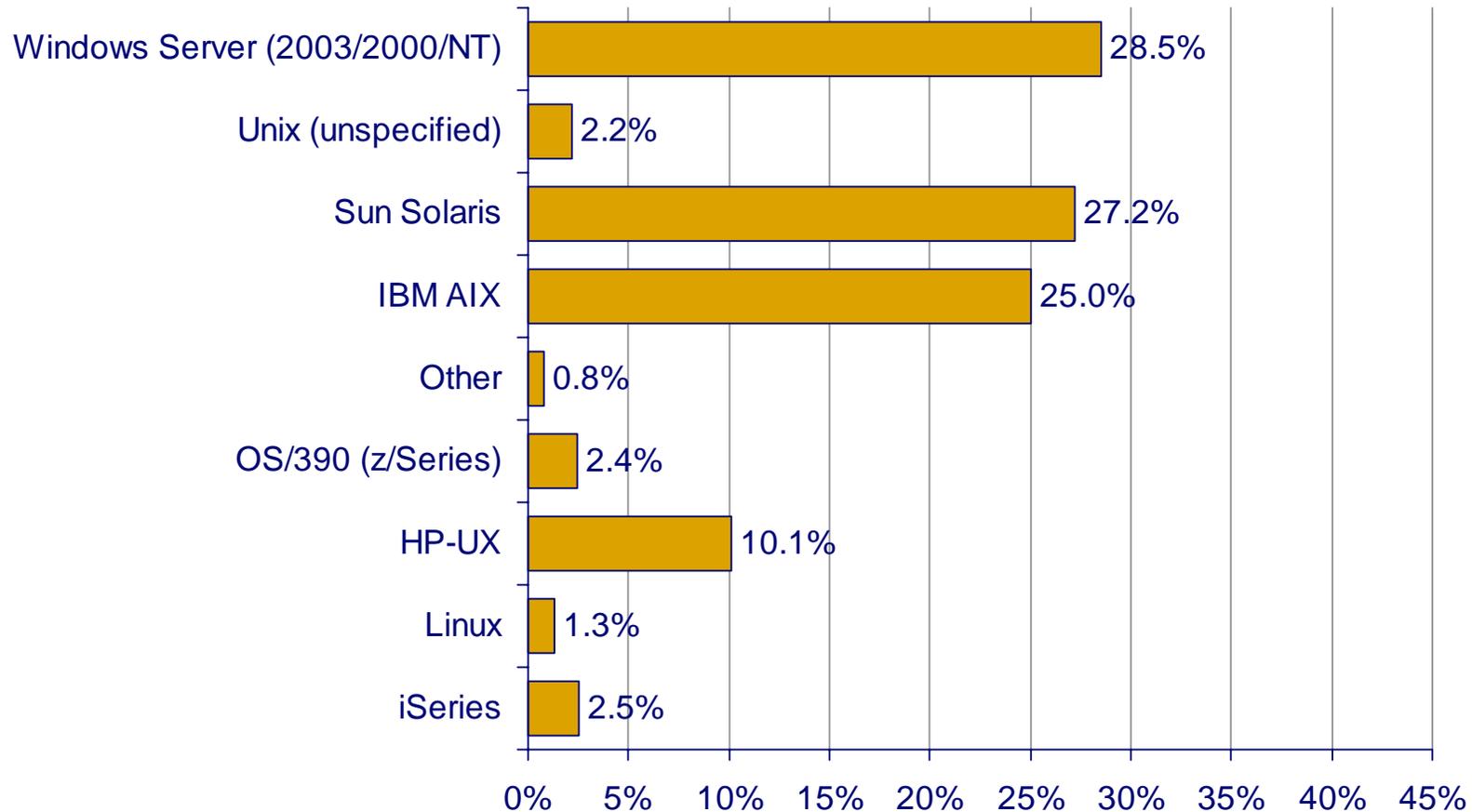
Q5. What percentage of your mission critical applications run on...?
(Multiple response adding to 100%)



Mean Percent - Europe Segment

Mission Critical Application Distribution Asia Segment

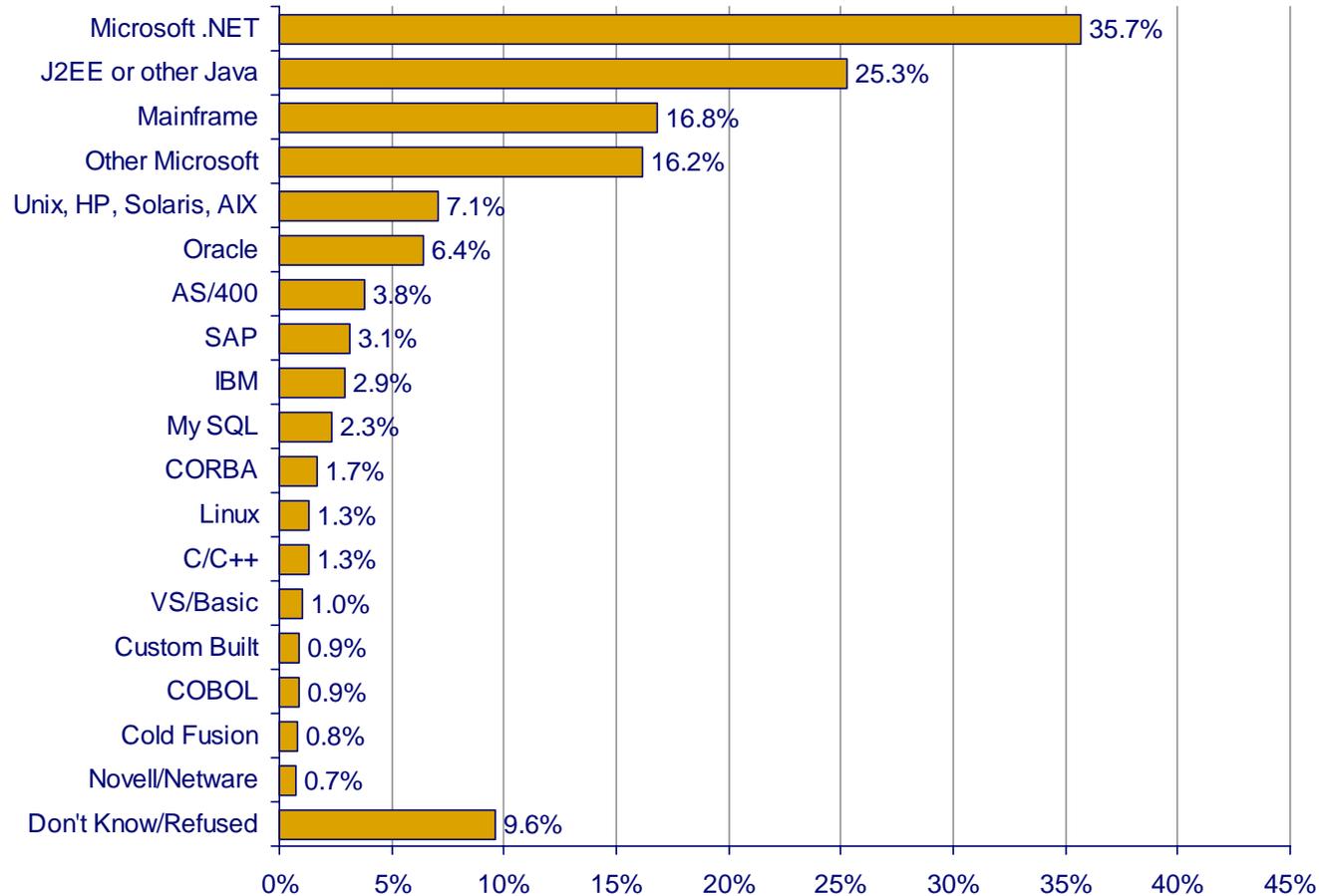
Q5. What percentage of your mission critical applications run on...?
(Multiple response adding to 100%)



Mean Percent - Asia Segment

Current Application Platforms in Use Worldwide

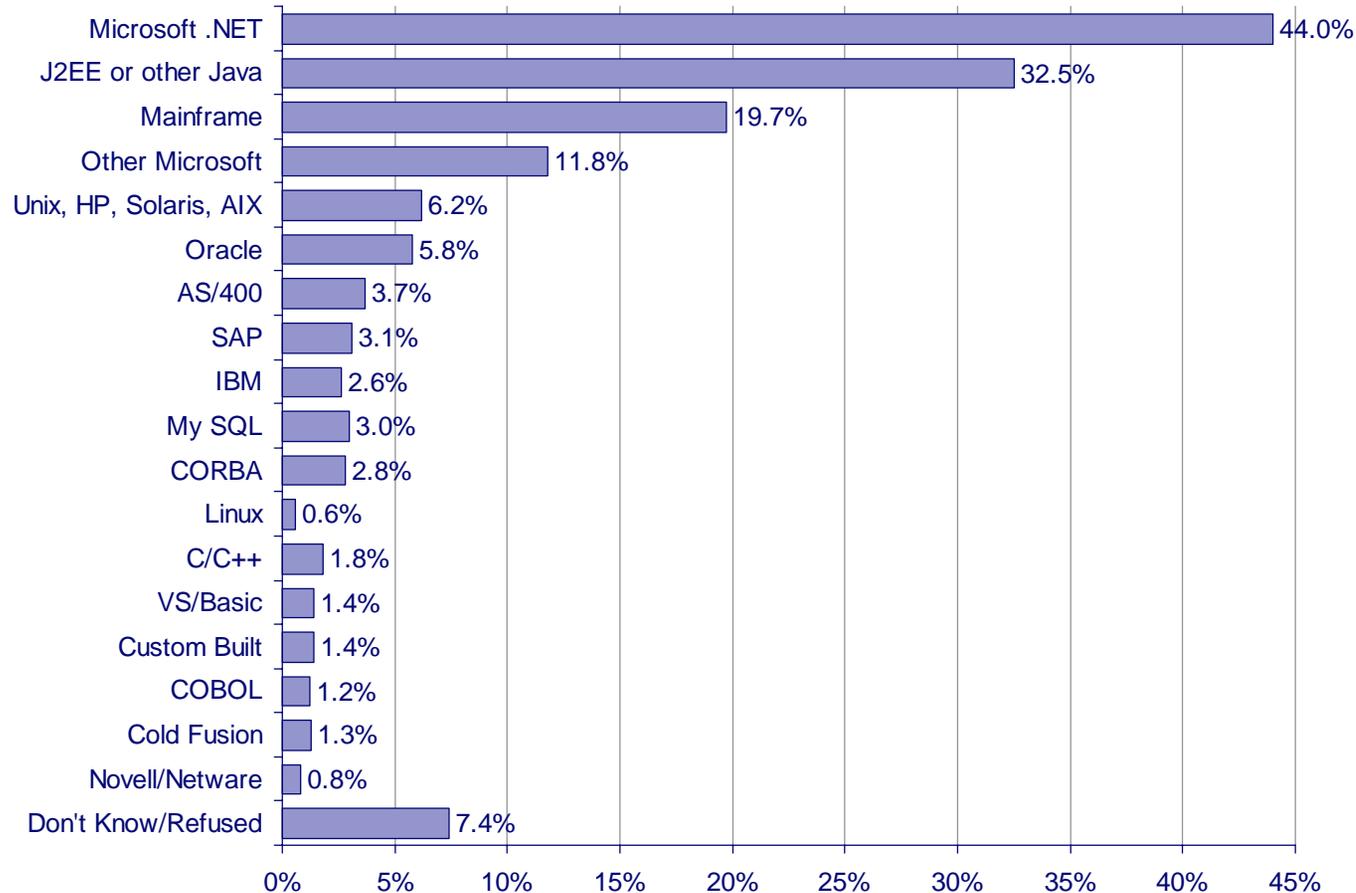
Q7: What software application platforms do your company's mission critical applications currently run on? (Multiple response, unprompted)



Percent of Respondents - Worldwide

Current Application Platforms in Use NA Segment

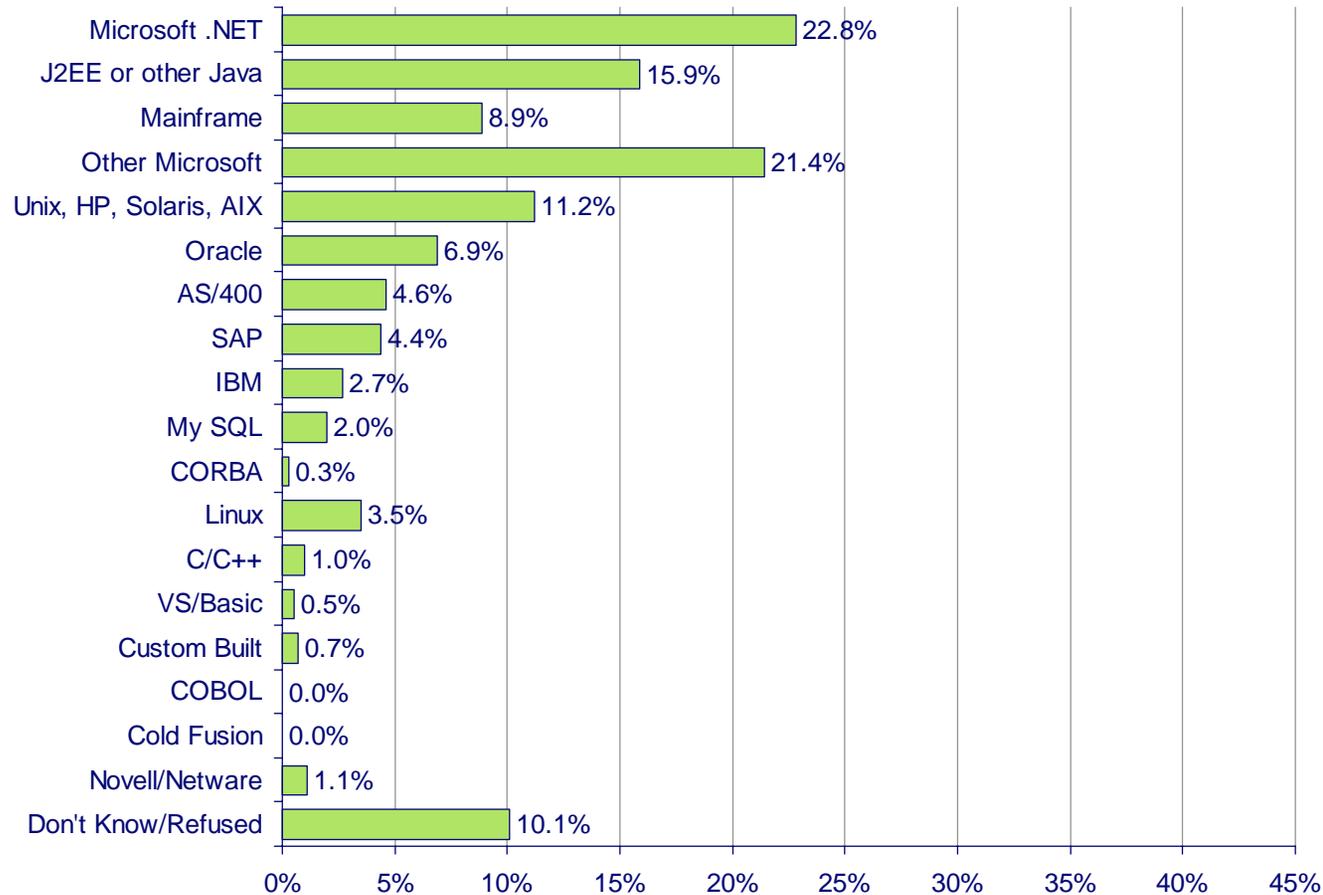
Q7: What software application platforms do your company's mission critical applications currently run on? (Multiple response, unprompted)



Percent of Respondents - NA Segment

Current Application Platforms in Use Europe Segment

Q7: What software application platforms do your company's mission critical applications currently run on? (Multiple response, unprompted)

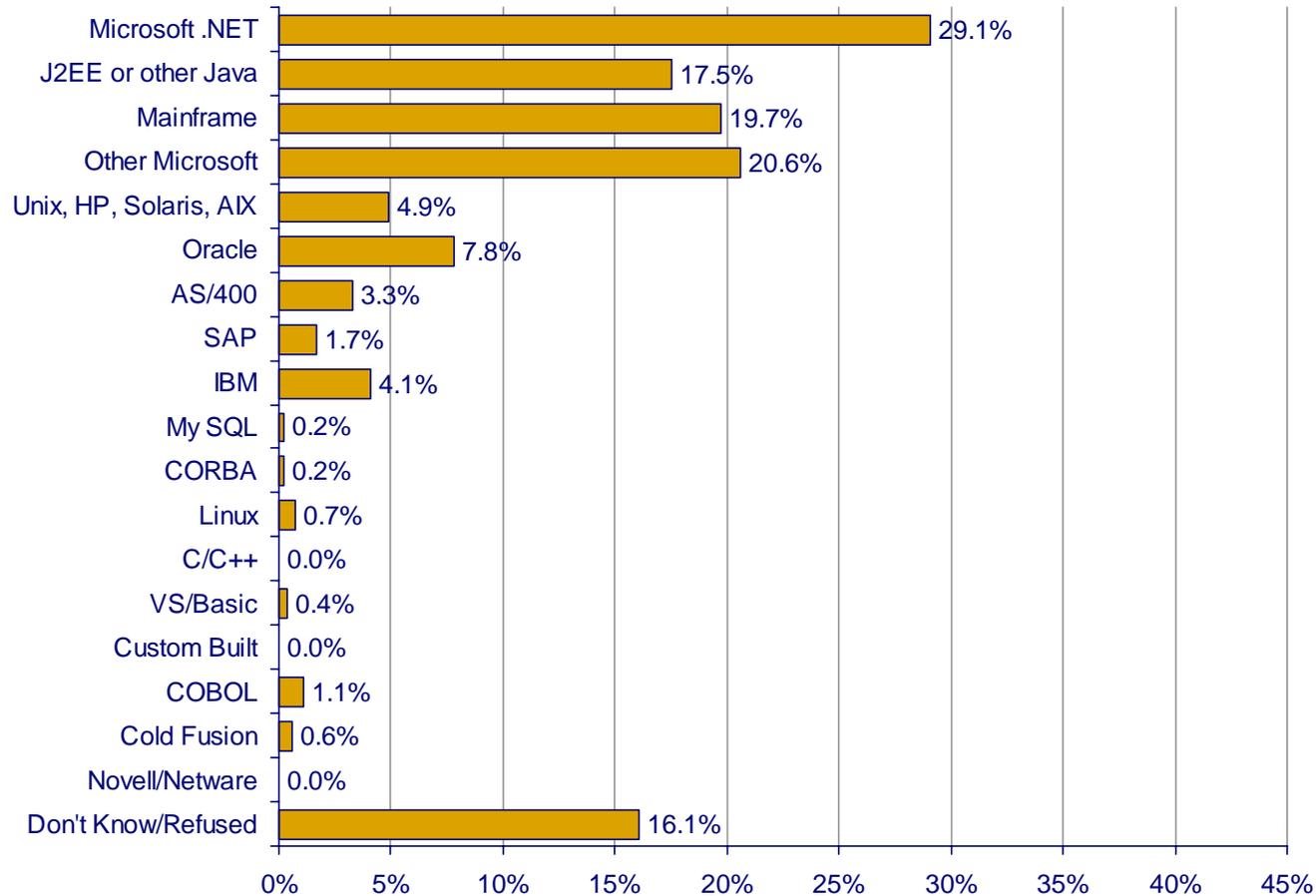


Percent of Respondents - Europe Segment

Current Application Platforms in Use

Asia Segment

Q7: What software application platforms do your company's mission critical applications currently run on? (Multiple response, unprompted)

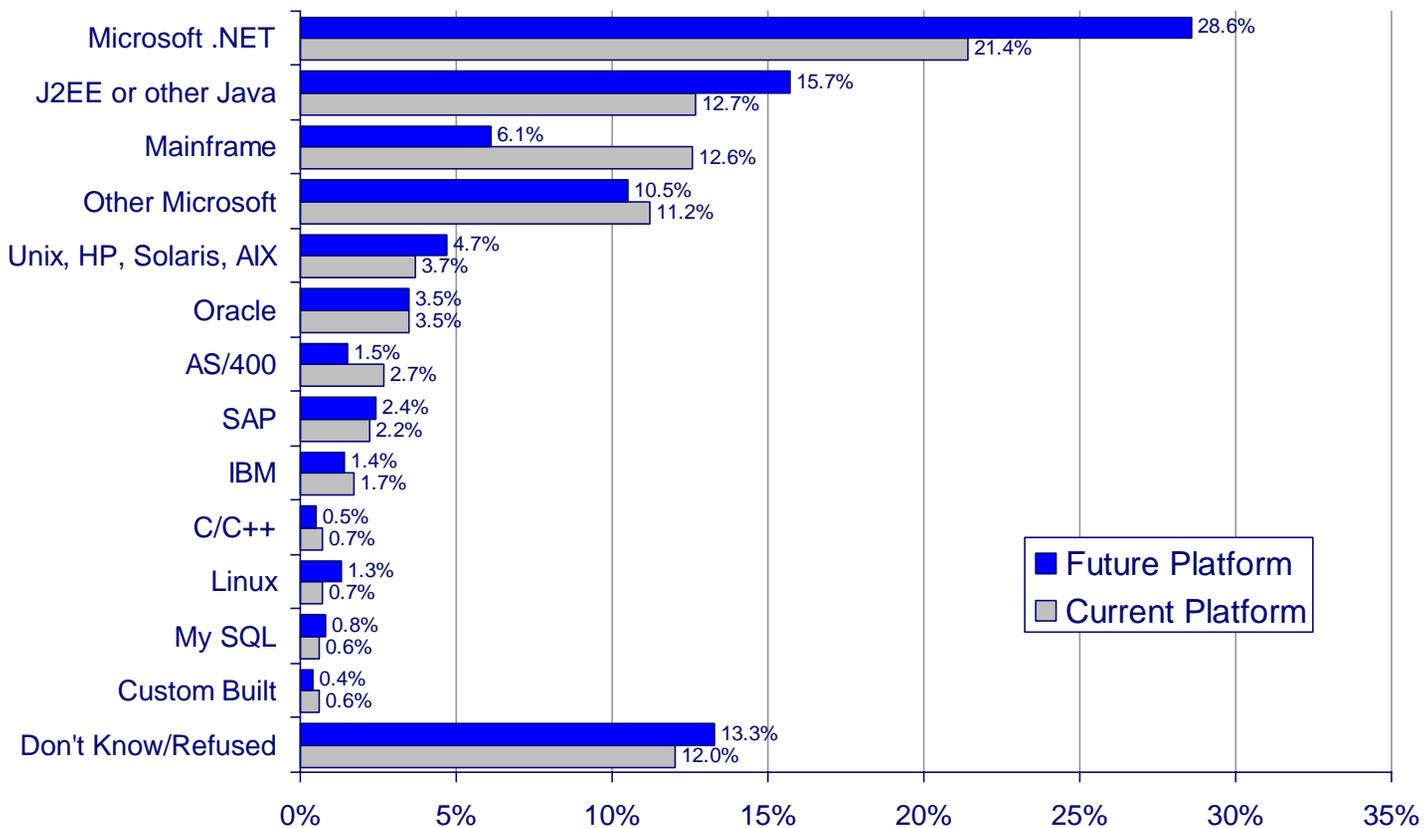


Percent of Respondents - Asia Segment

Current/Future Primary Application Platform Worldwide

Q8: Which software application platform does your company currently use for the greatest number of its mission critical applications? (*Single response*)

Q9: Which software application platform do you expect to use the most for developing mission critical applications at your company in the next 2 years? (*Single response*)

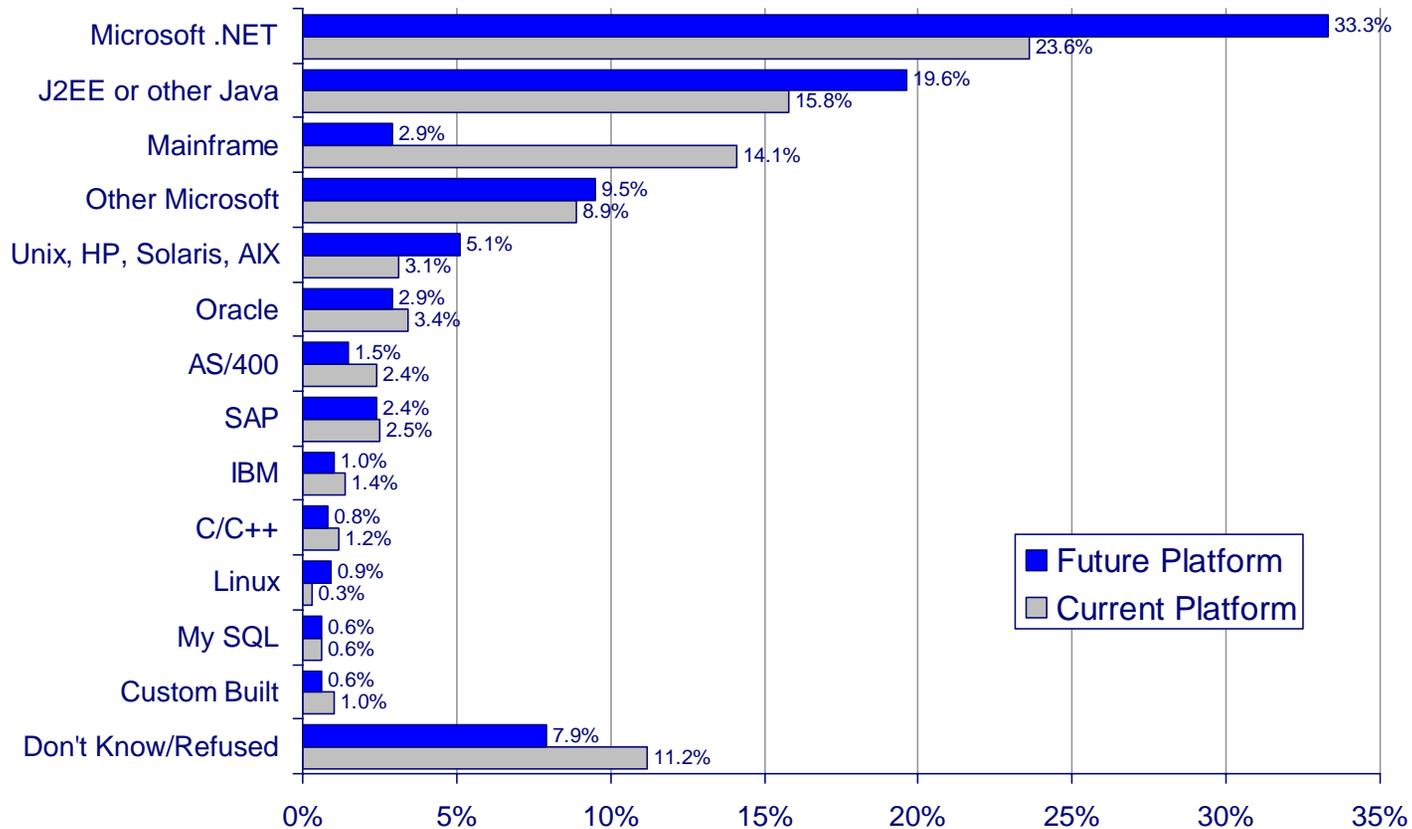


Percent of Respondents - Worldwide

Current/Future Primary Application Platform NA Segment

Q8: Which software application platform does your company currently use for the greatest number of its mission critical applications? *(Single response)*

Q9: Which software application platform do you expect to use the most for developing mission critical applications at your company in the next 2 years? *(Single response)*

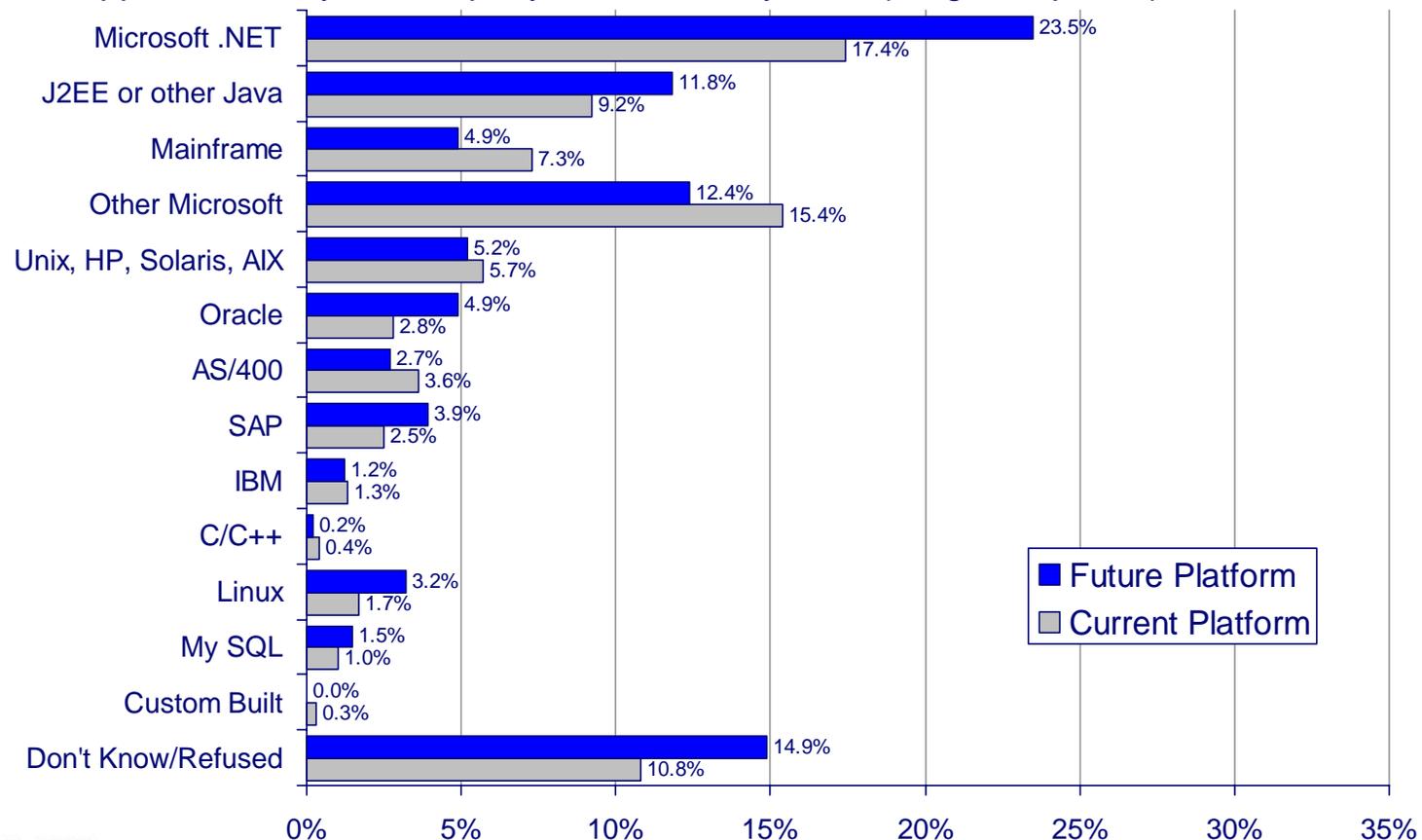


Percent of Respondents - NA Segment

Current/Future Primary Application Platform Europe Segment

Q8: Which software application platform does your company currently use for the greatest number of its mission critical applications? (*Single response*)

Q9: Which software application platform do you expect to use the most for developing mission critical applications at your company in the next 2 years? (*Single response*)



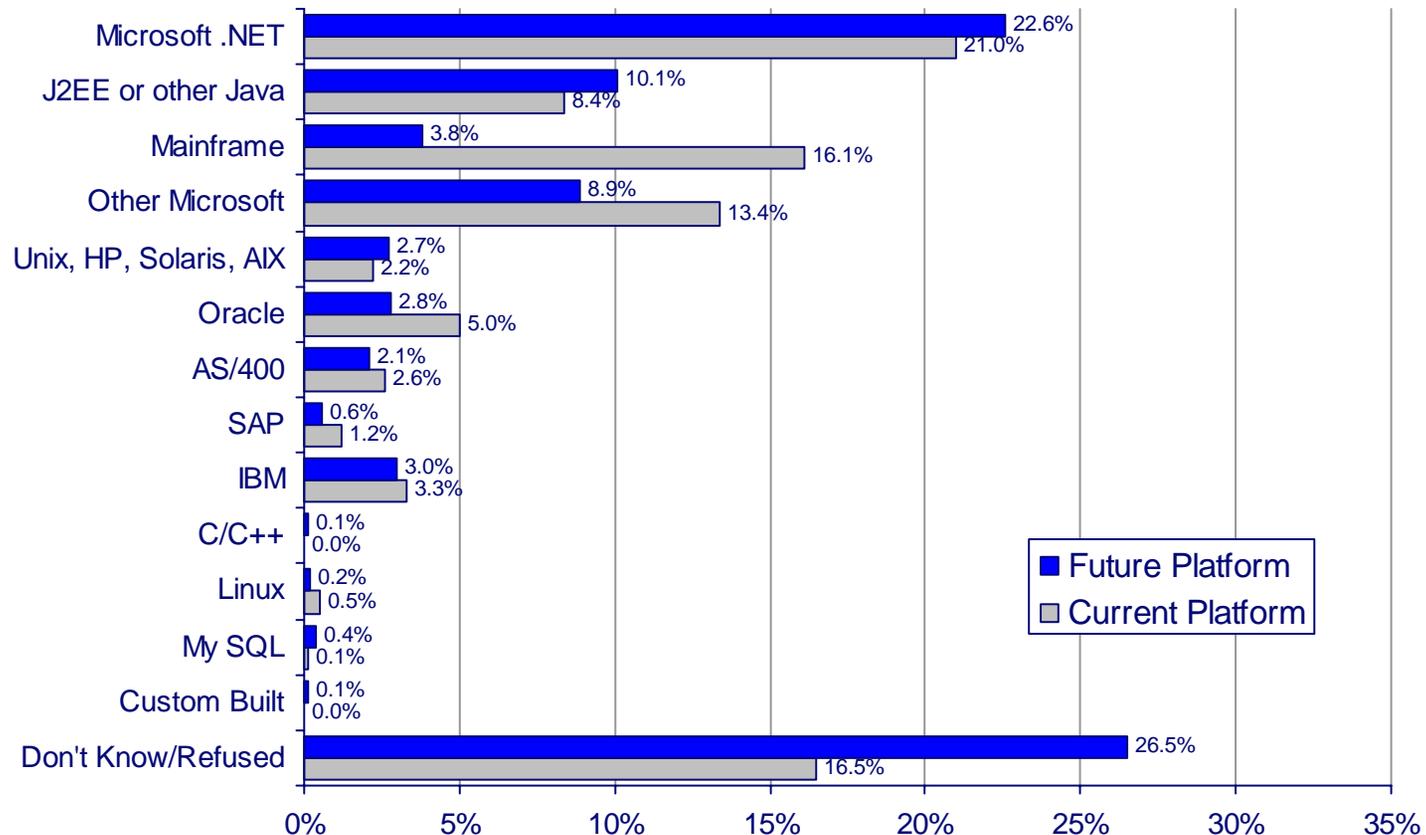
Percent of Respondents - Europe Segment

Source: 2005 Mission Critical Survey, weighted data, N=611

Current/Future Primary Application Platform Asia Segment

Q8: Which software application platform does your company currently use for the greatest number of its mission critical applications? (*Single response*)

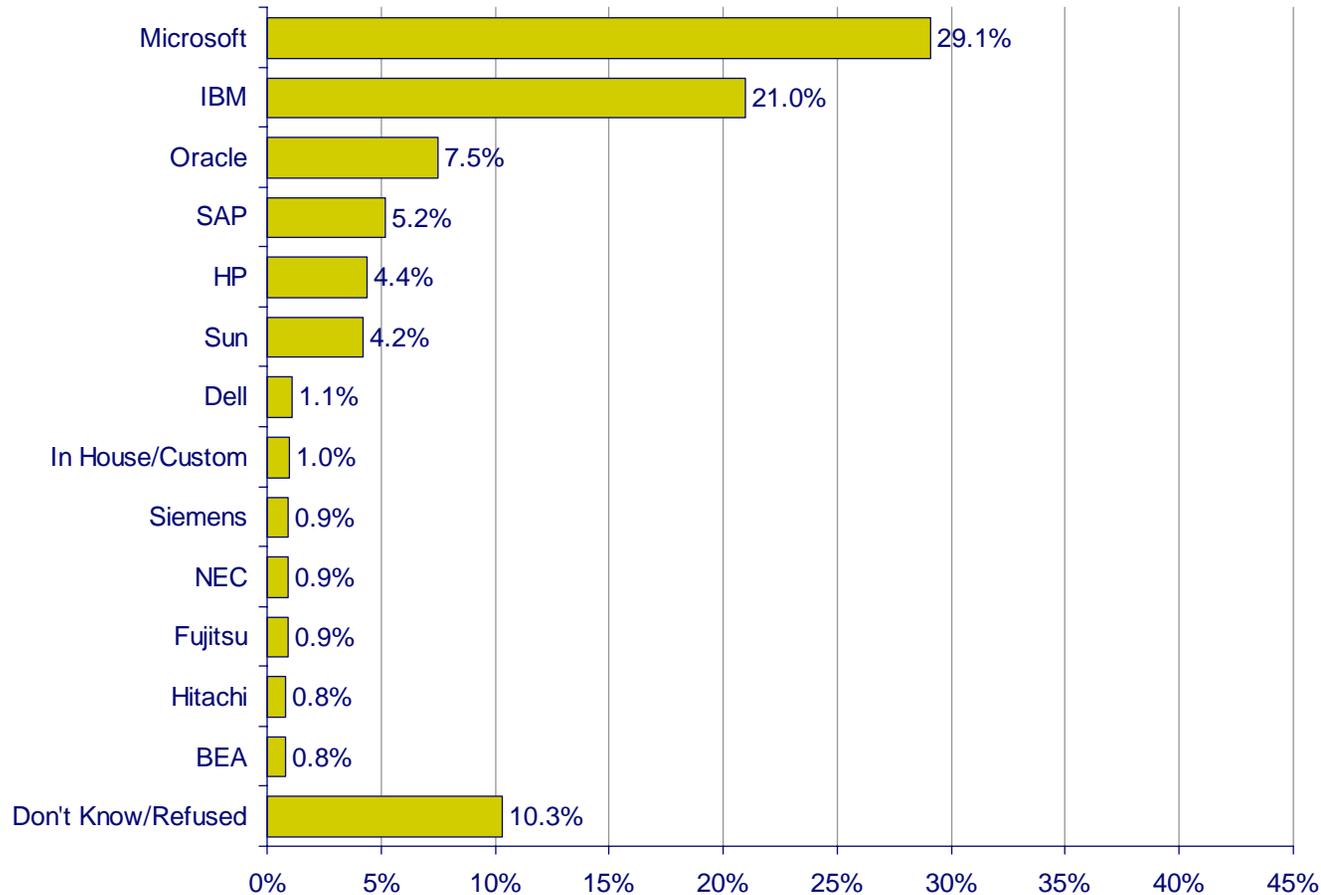
Q9: Which software application platform do you expect to use the most for developing mission critical applications at your company in the next 2 years? (*Single response*)



Percent of Respondents - Asia Segment

Current Primary Application Platform Vendor Worldwide

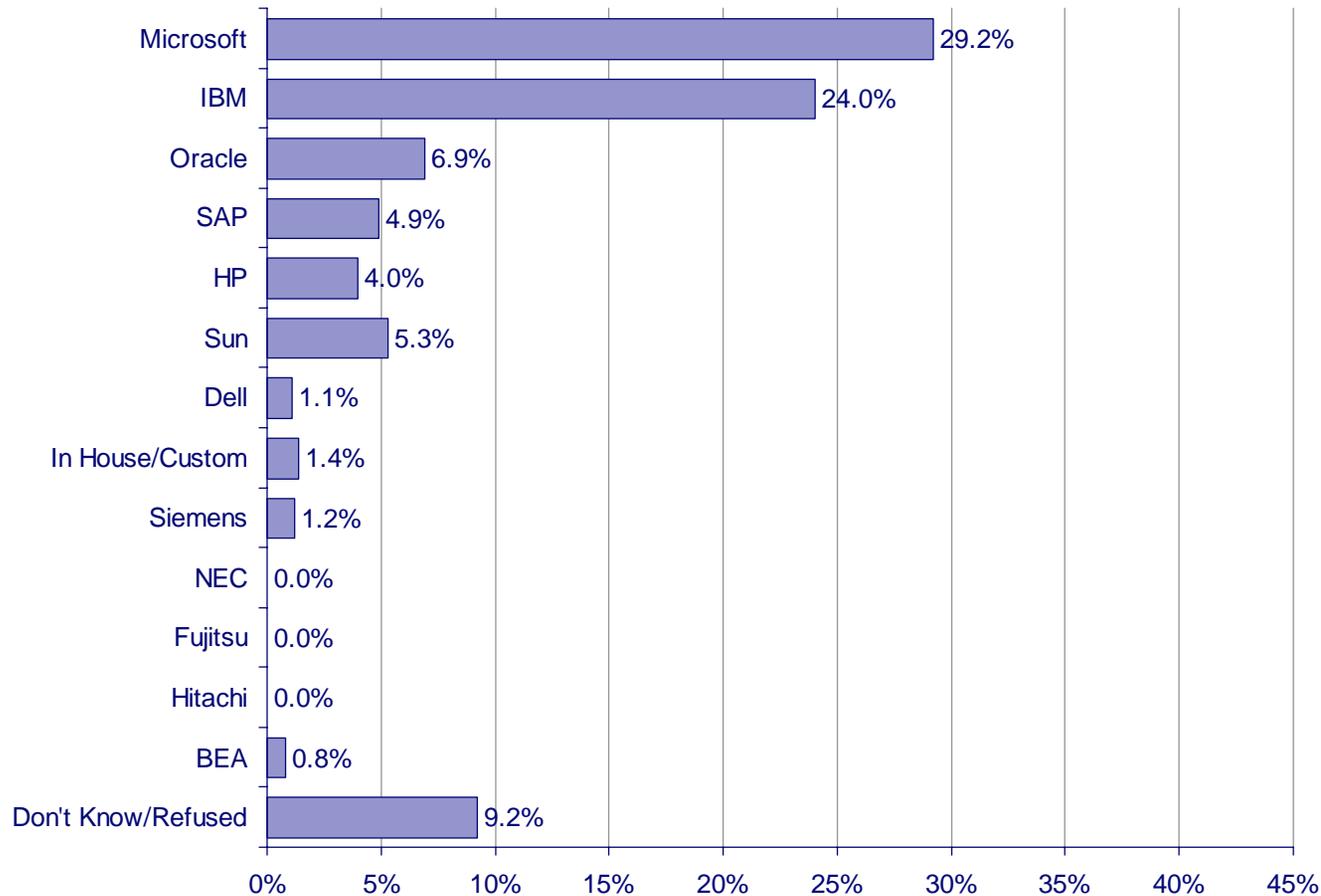
Q10: What vendor is the primary supplier of the application technology platform company's largest number of mission critical applications? (*Single response, unprompted*)



Percent of Respondents - Worldwide

Current Primary Application Platform Vendor NA Segment

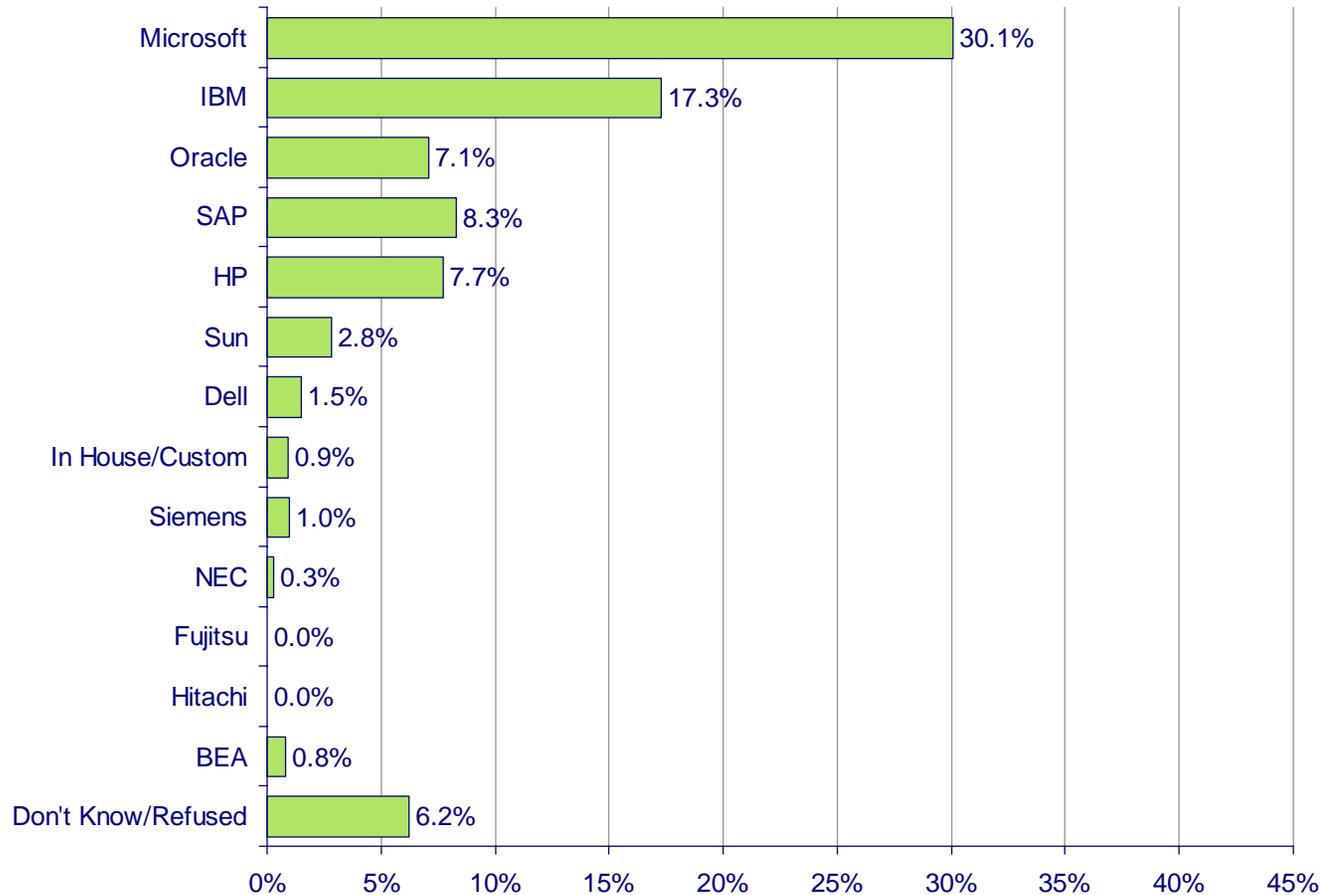
Q10: What vendor is the primary supplier of the application technology platform company's largest number of mission critical applications? (*Single response, unprompted*)



Percent of Respondents - NA Segment

Current Primary Application Platform Vendor Europe Segment

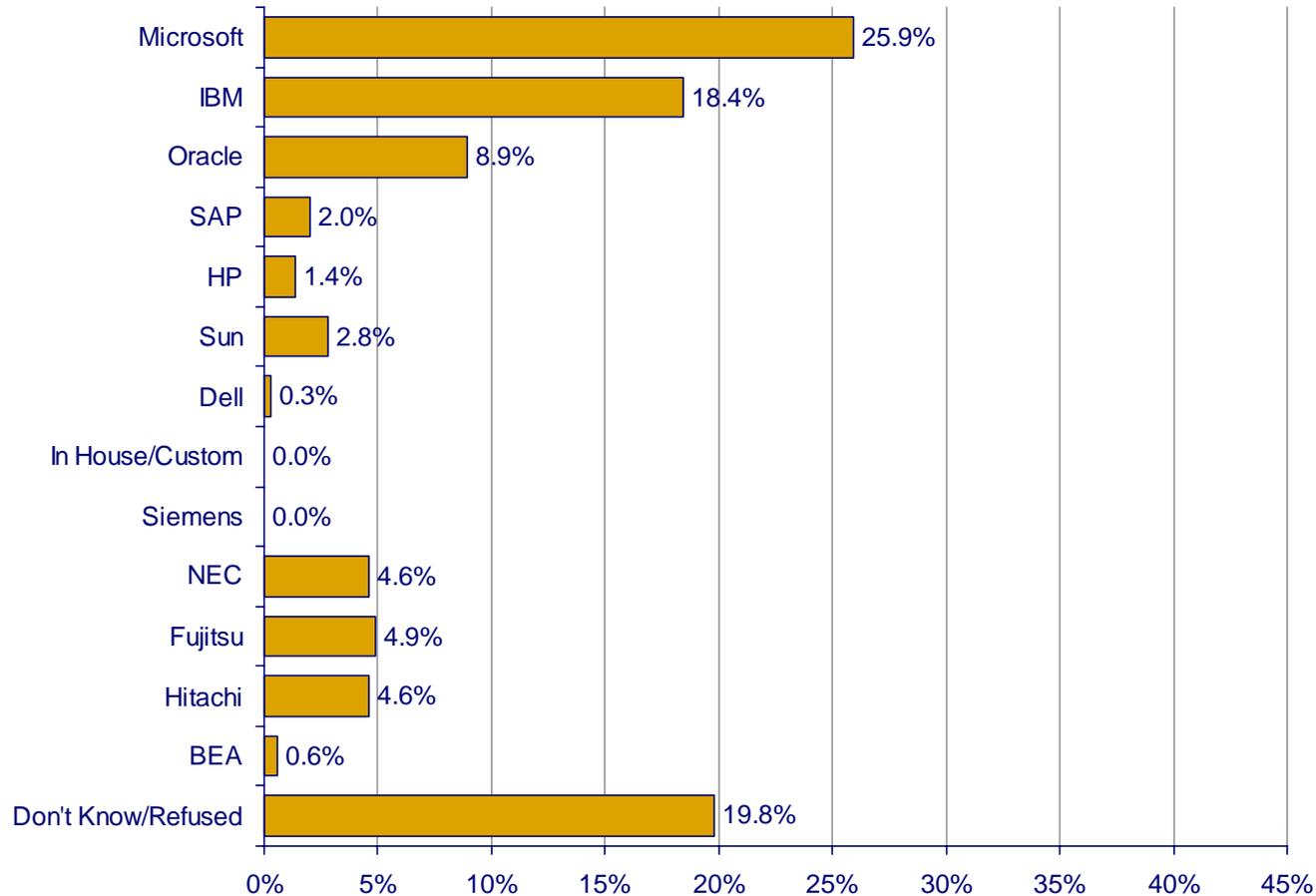
Q10: What vendor is the primary supplier of the application technology platform company's largest number of mission critical applications? (*Single response, unprompted*)



Percent of Respondents - Europe Segment

Current Primary Application Platform Vendor Asia Segment

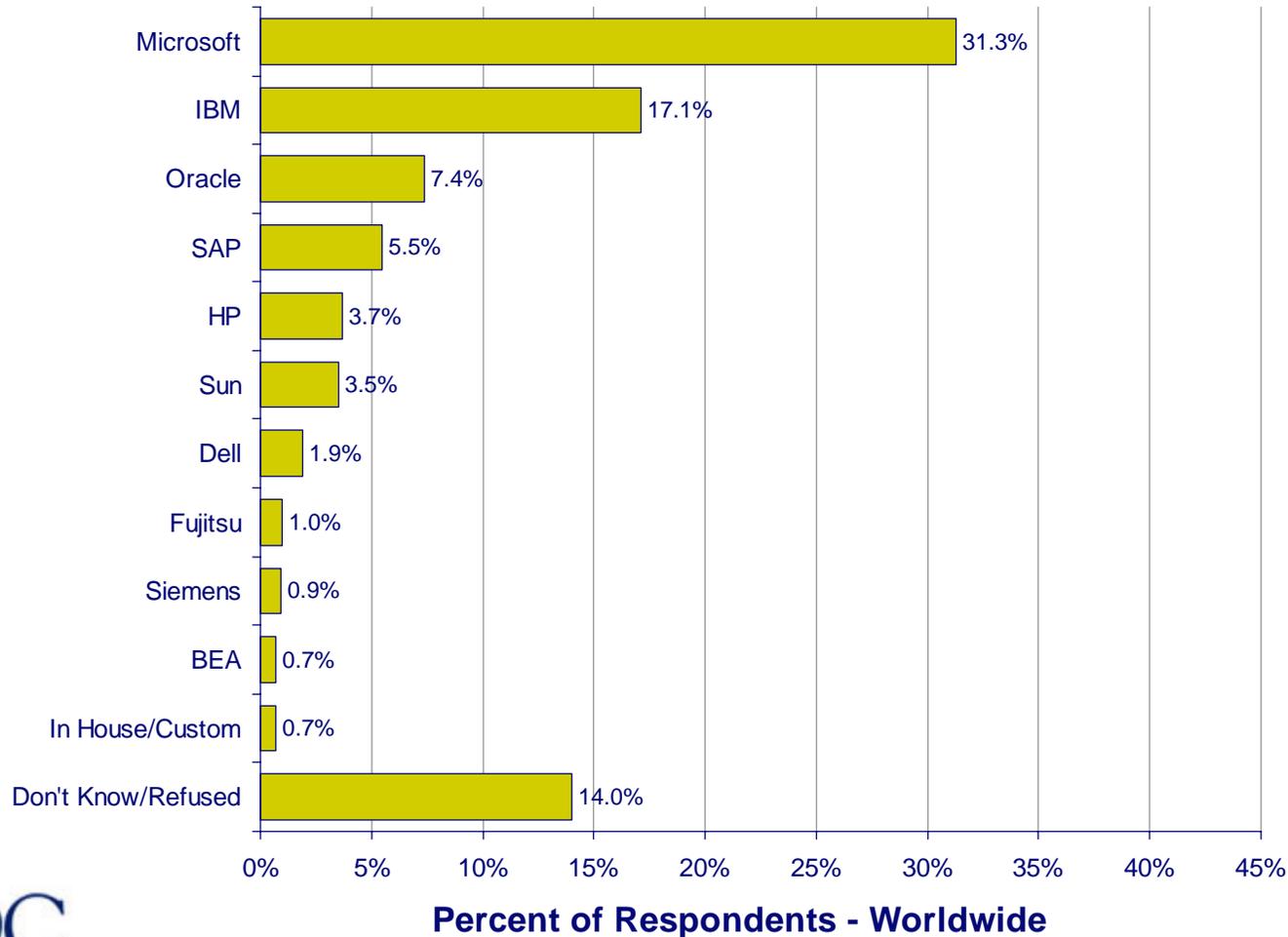
Q10: What vendor is the primary supplier of the application technology platform company's largest number of mission critical applications? (*Single response, unprompted*)



Percent of Respondents - Asia Segment

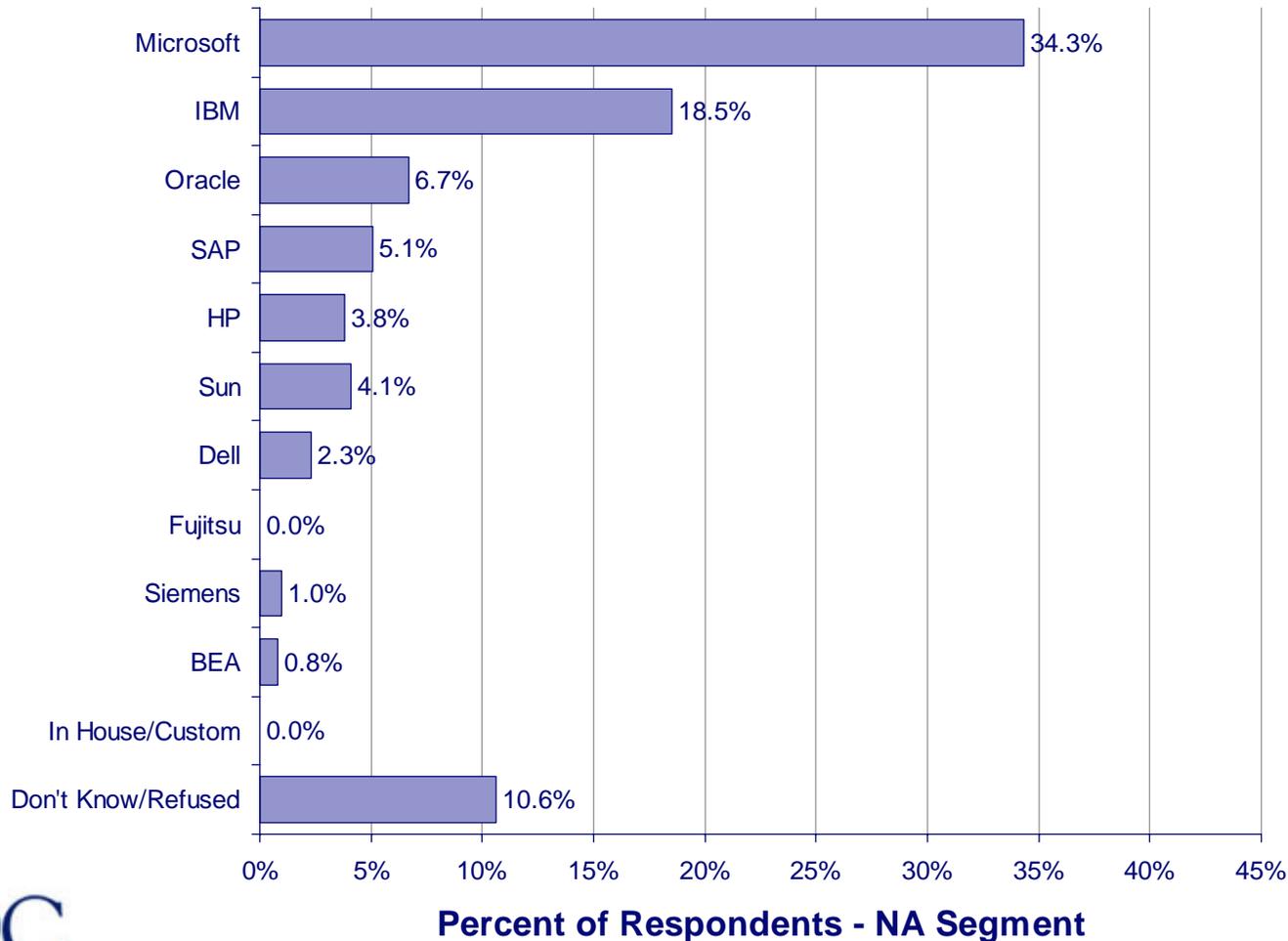
Future Primary Application Platform Vendor Worldwide

Q11: Which vendor do you expect to use in the next two years as the primary supplier of your application technology platform? (Single response, unprompted)



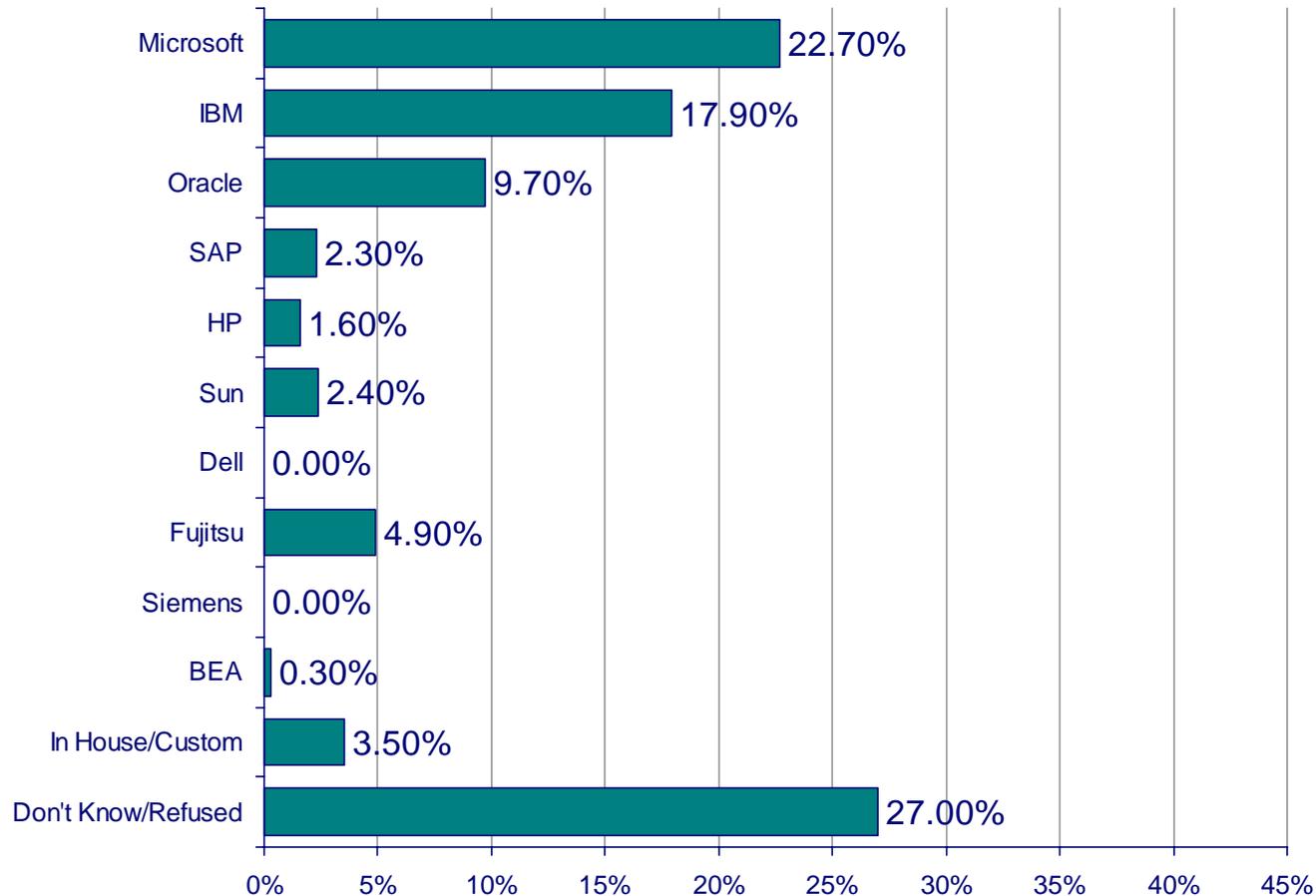
Future Primary Application Platform Vendor NA Segment

Q11: Which vendor do you expect to use in the next two years as the primary supplier of your application technology platform? (Single response, unprompted)



Future Primary Application Platform Vendor Europe Segment

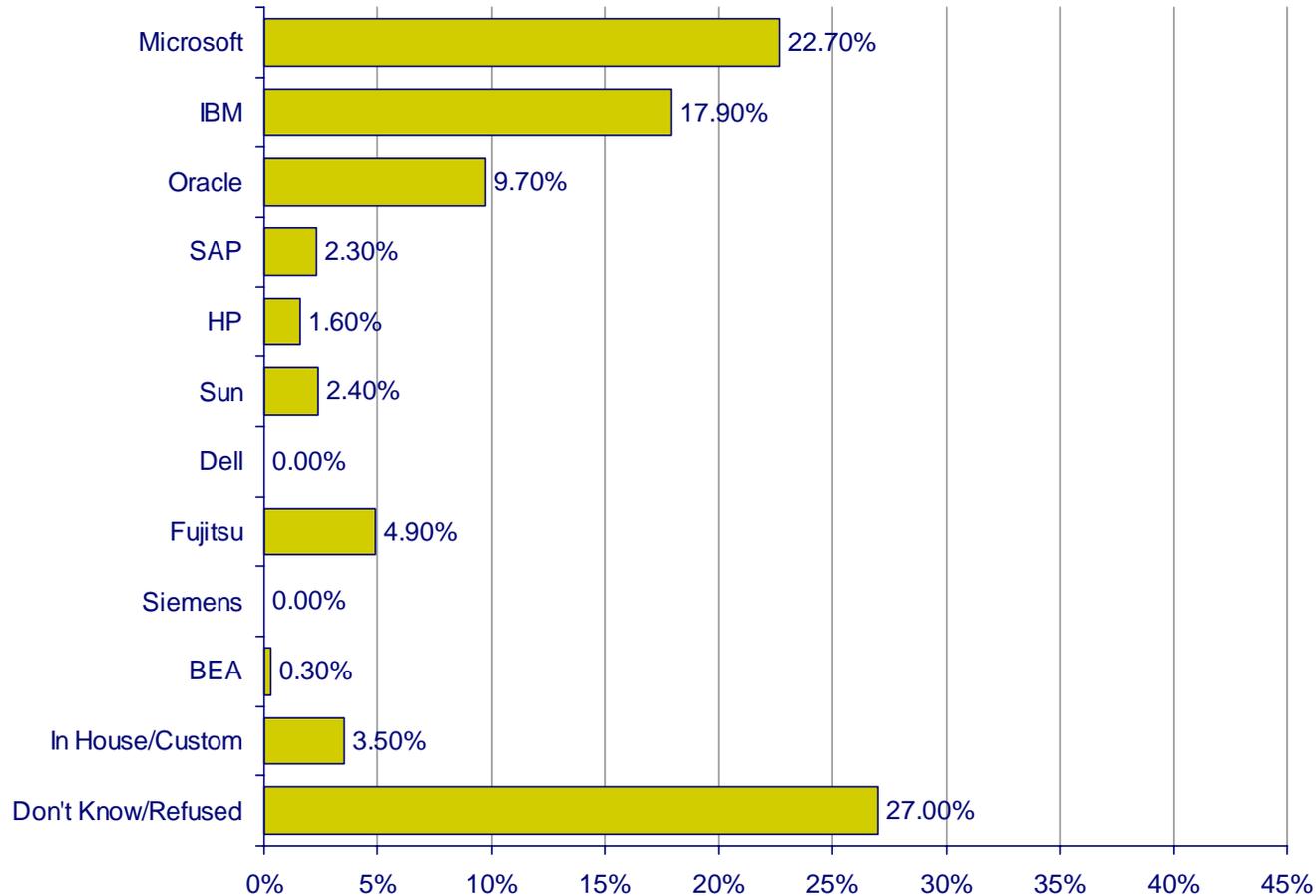
Q11: Which vendor do you expect to use in the next two years as the primary supplier of your application technology platform? (Single response, unprompted)



Percent of Respondents - Europe Segment

Future Primary Application Platform Vendor Asia Segment

Q11: Which vendor do you expect to use in the next two years as the primary supplier of your application technology platform? (Single response, unprompted)



Percent of Respondents - Europe Segment

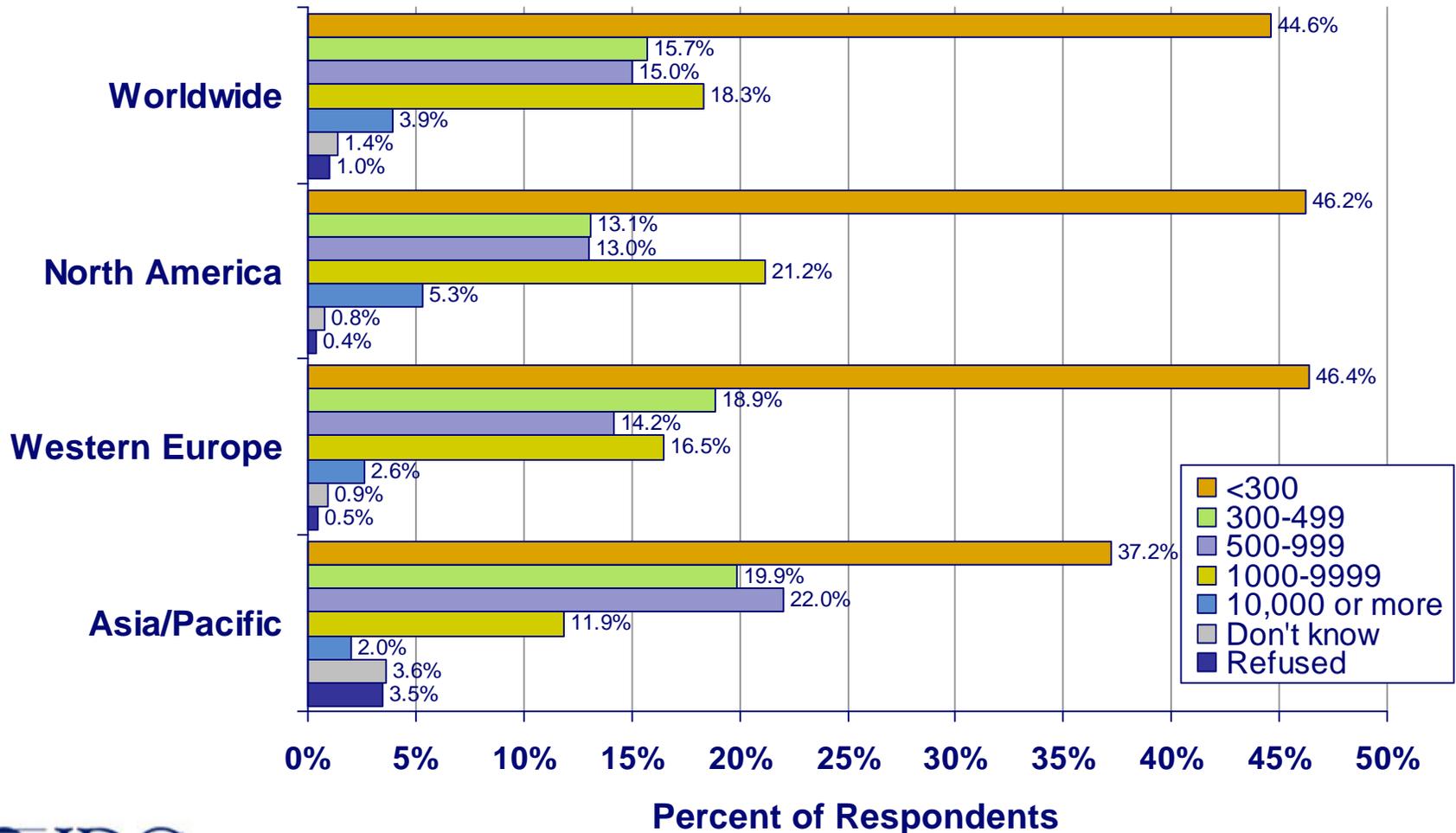
Primary Application Analysis

Primary Application Description

- Q16: Number of peak concurrent users
- Q22: Offshoring of primary project
- Q23: Percent of primary project offshored
- Q28: Does primary project use an application server
- Q29: Main application server used
- Q36: Are you working with Web services
- Q37 Vendors used for Web services
- Q38: Are you working with SOA
- Q39: Vendors used for SOA
- Q43: Does primary project use messaging or queuing
- Q44: Messaging or queuing technologies used
- Q46: Software used for managing and monitoring applications

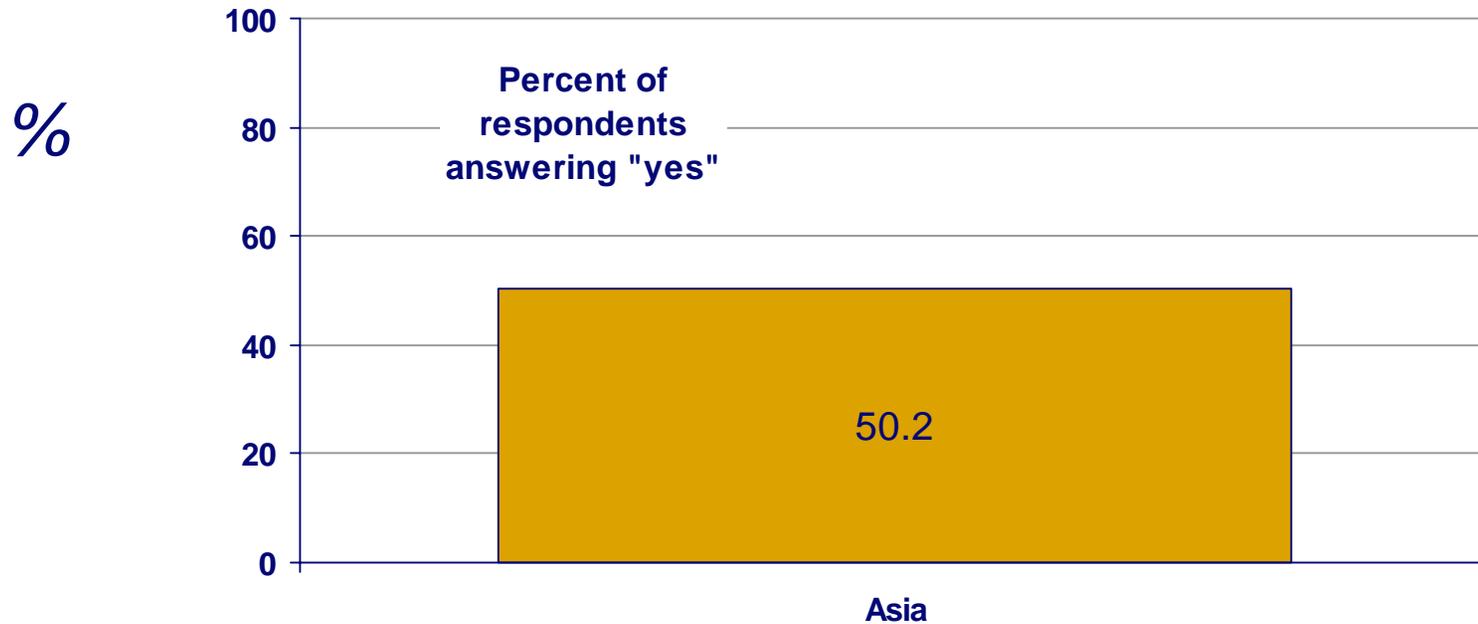
Number of Peak Concurrent Users Worldwide and Regional Segments

Q16: How many end users will use your primary project or application concurrently at peak times?



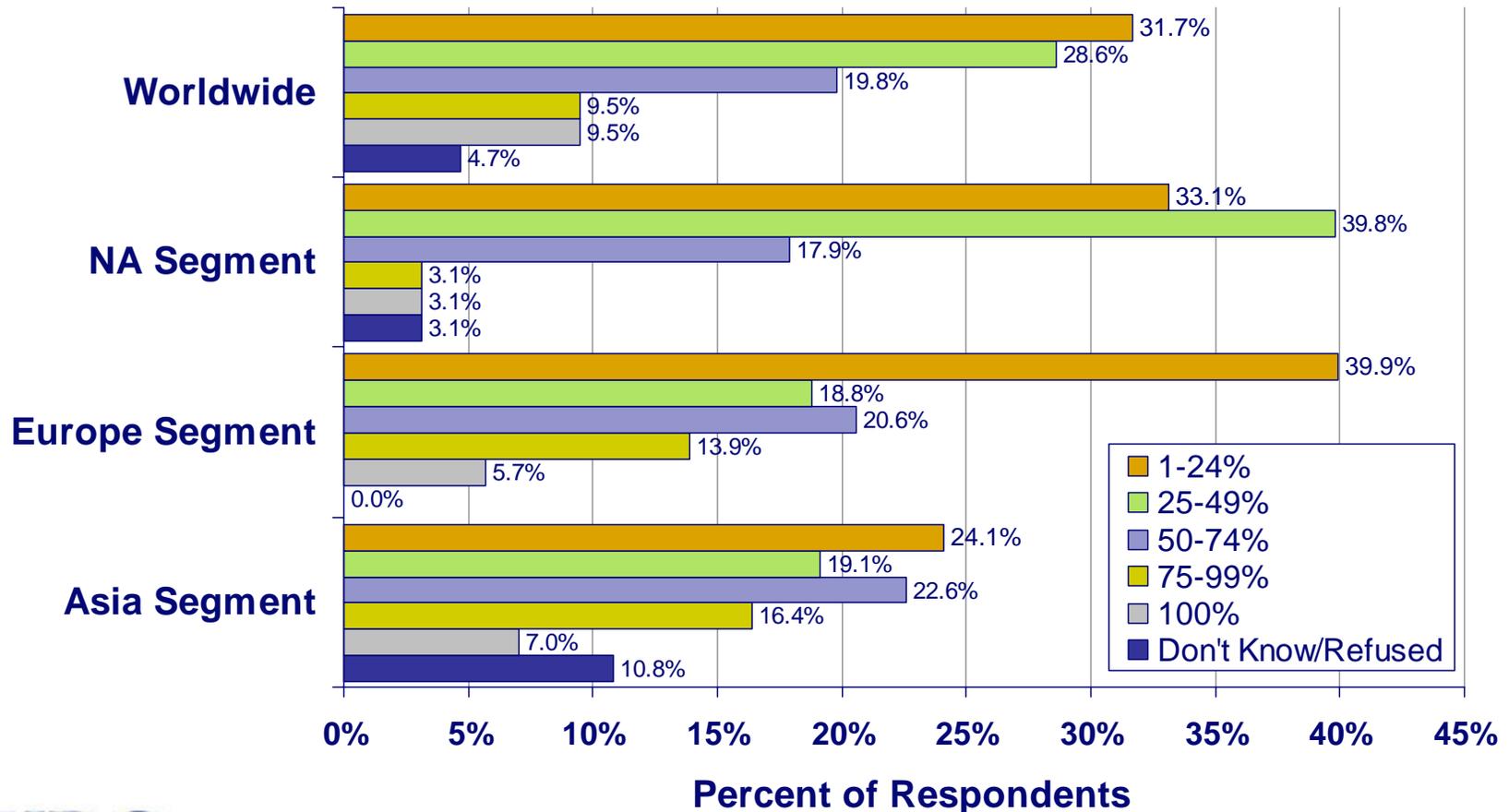
Offshoring of Primary Project Worldwide and Regional Segments

Q22: Is any part of the development or deployment of your primary application offshored?



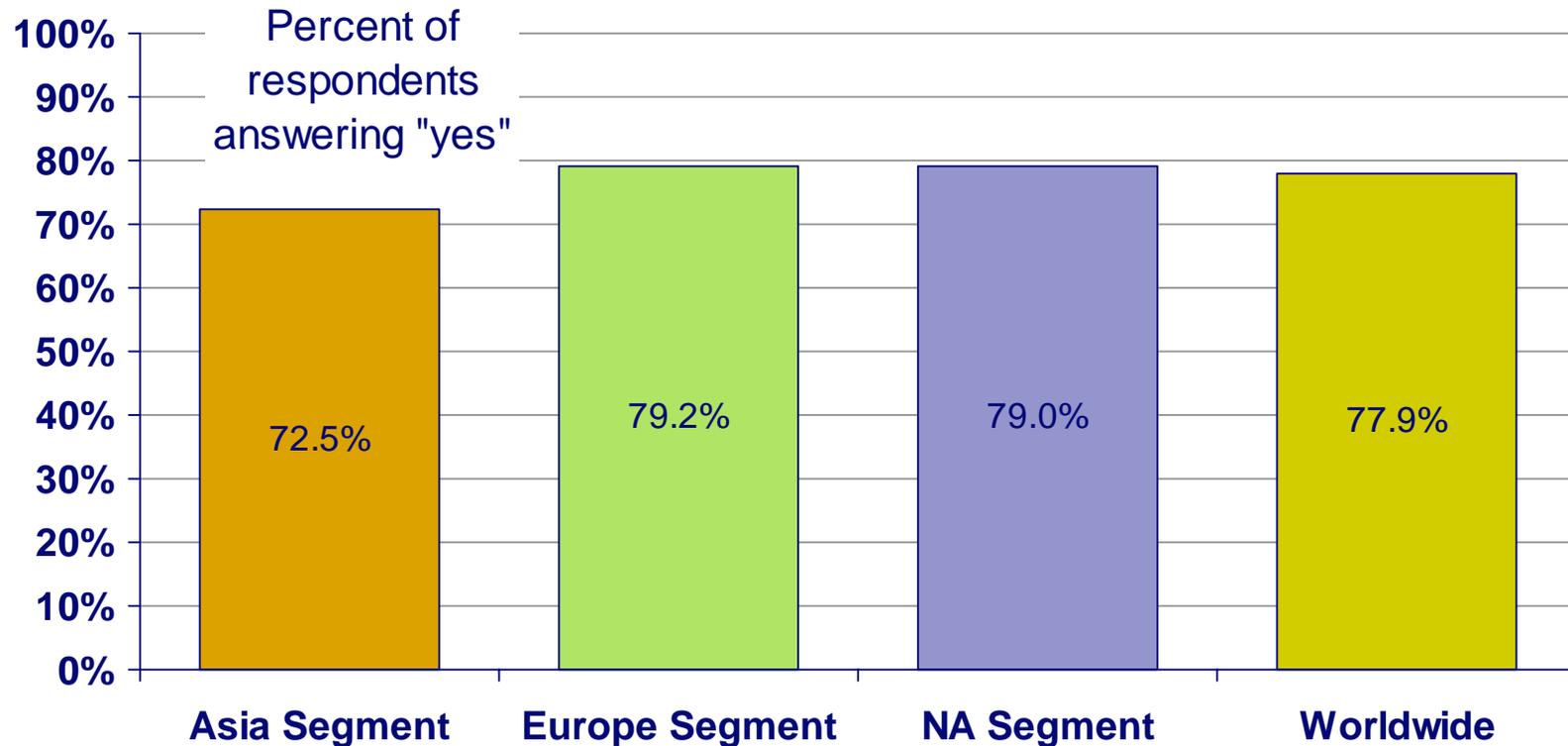
Percent of Primary Application Offshored Worldwide and Regional Segments

Q23: What percentage (of primary project) was offshored?



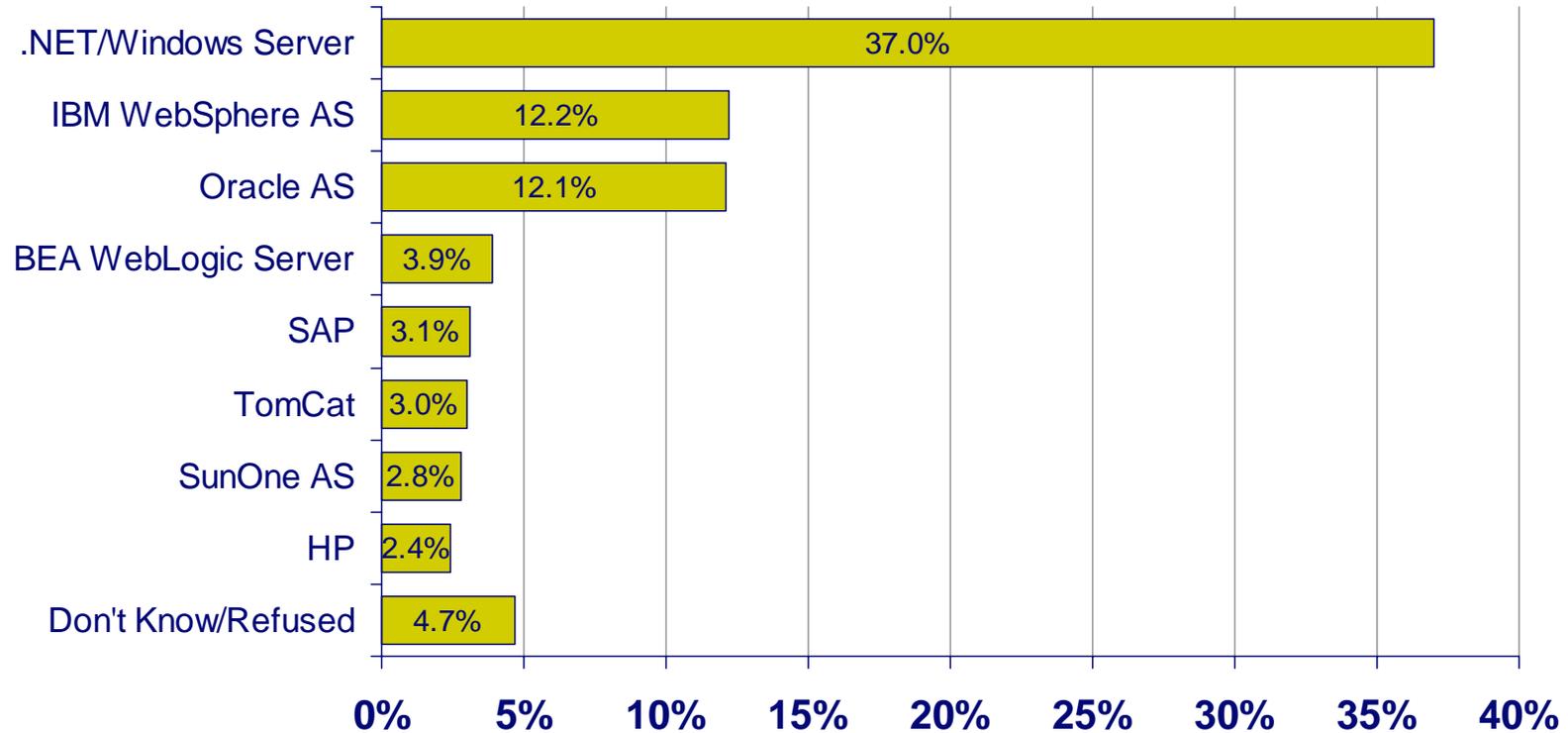
Primary Project Use of Application Server Worldwide and Regional Segments

Q28: Does your primary project use an application server?



Main Application Server Used on Project Worldwide

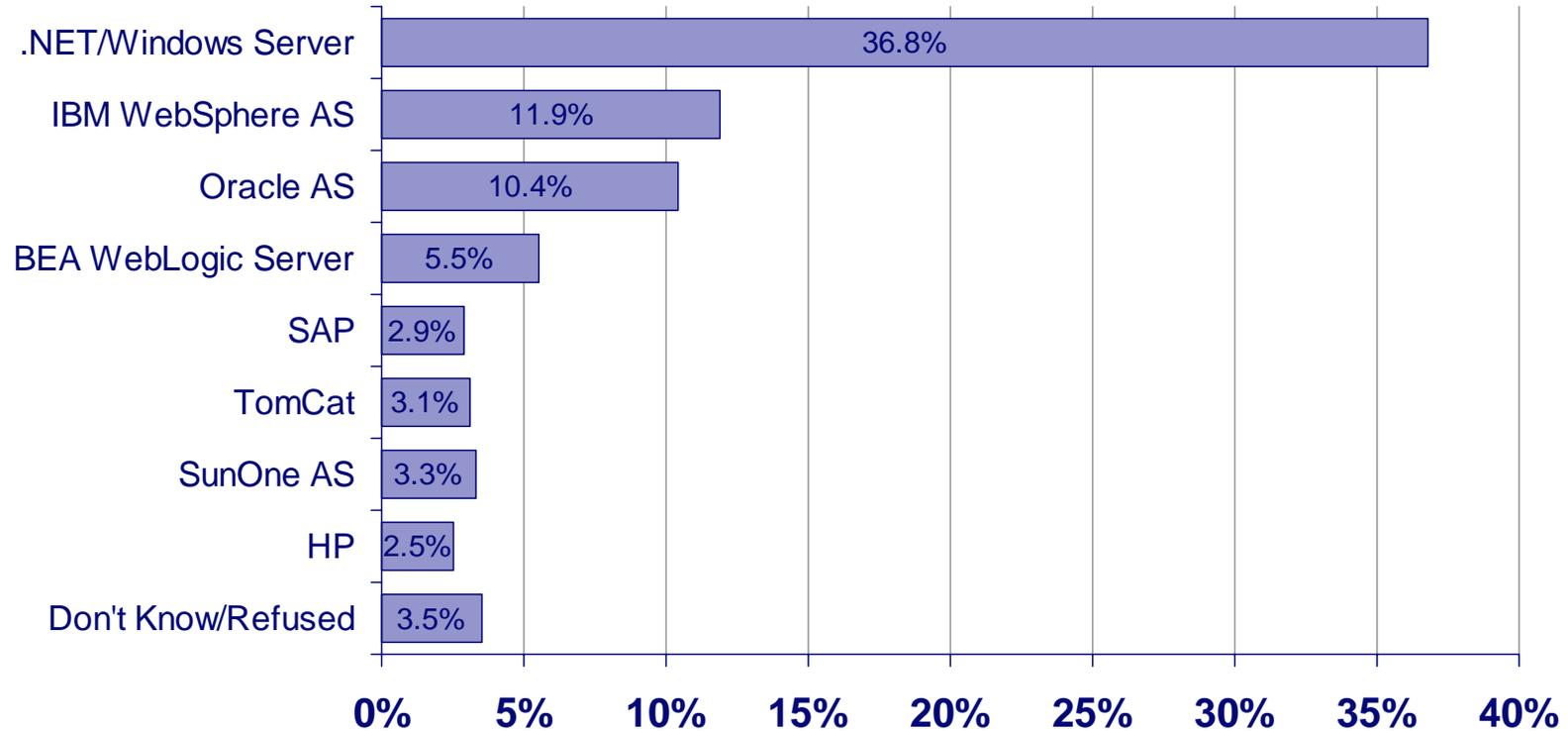
Q29: What is the main application server for this application?
(Read list as necessary)



Percent of Respondents - Worldwide

Main Application Server Used on Project NA Segment

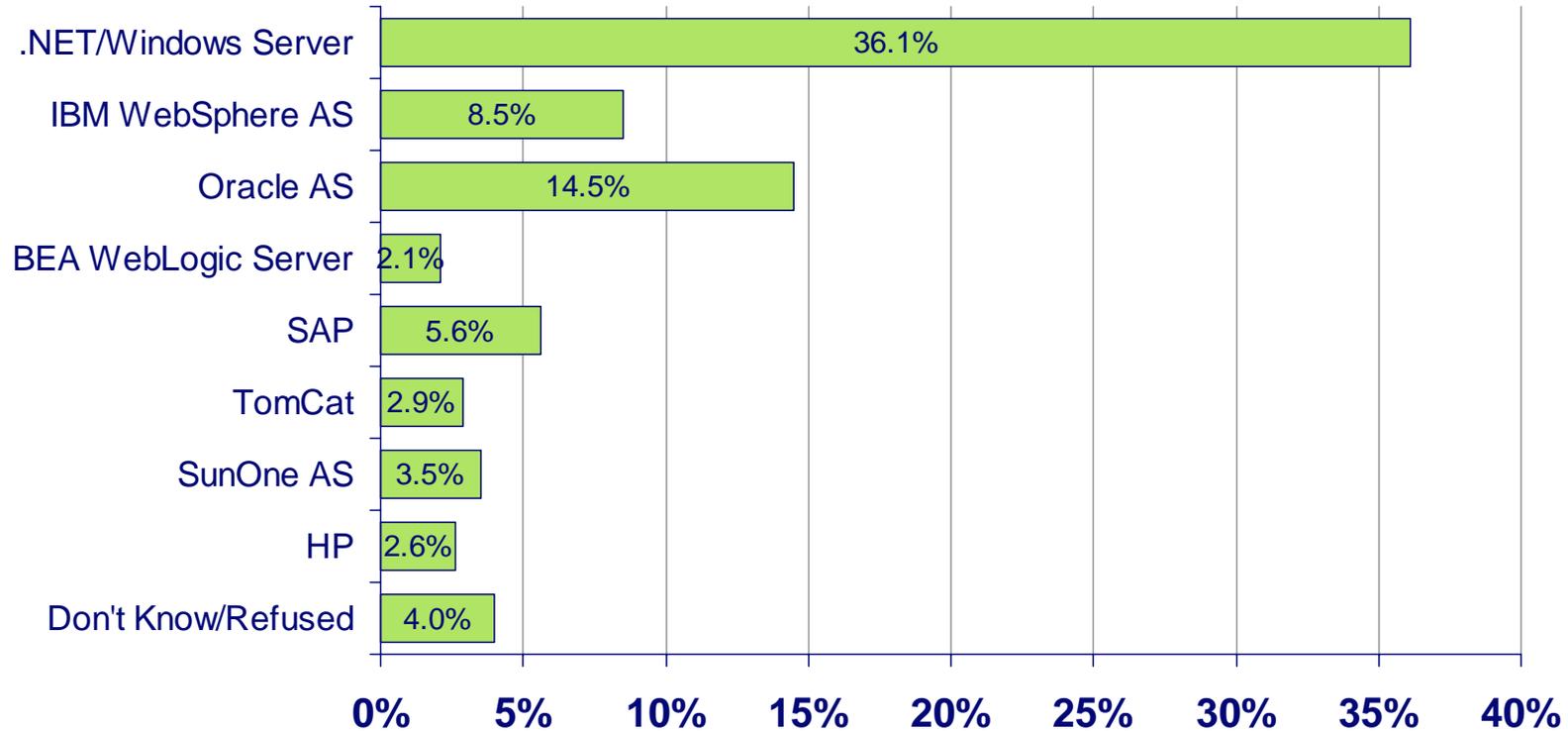
Q29: What is the main application server for this application?
(Read list as necessary)



Percent of Respondents - NA Segment

Main Application Server Used on Project Europe Segment

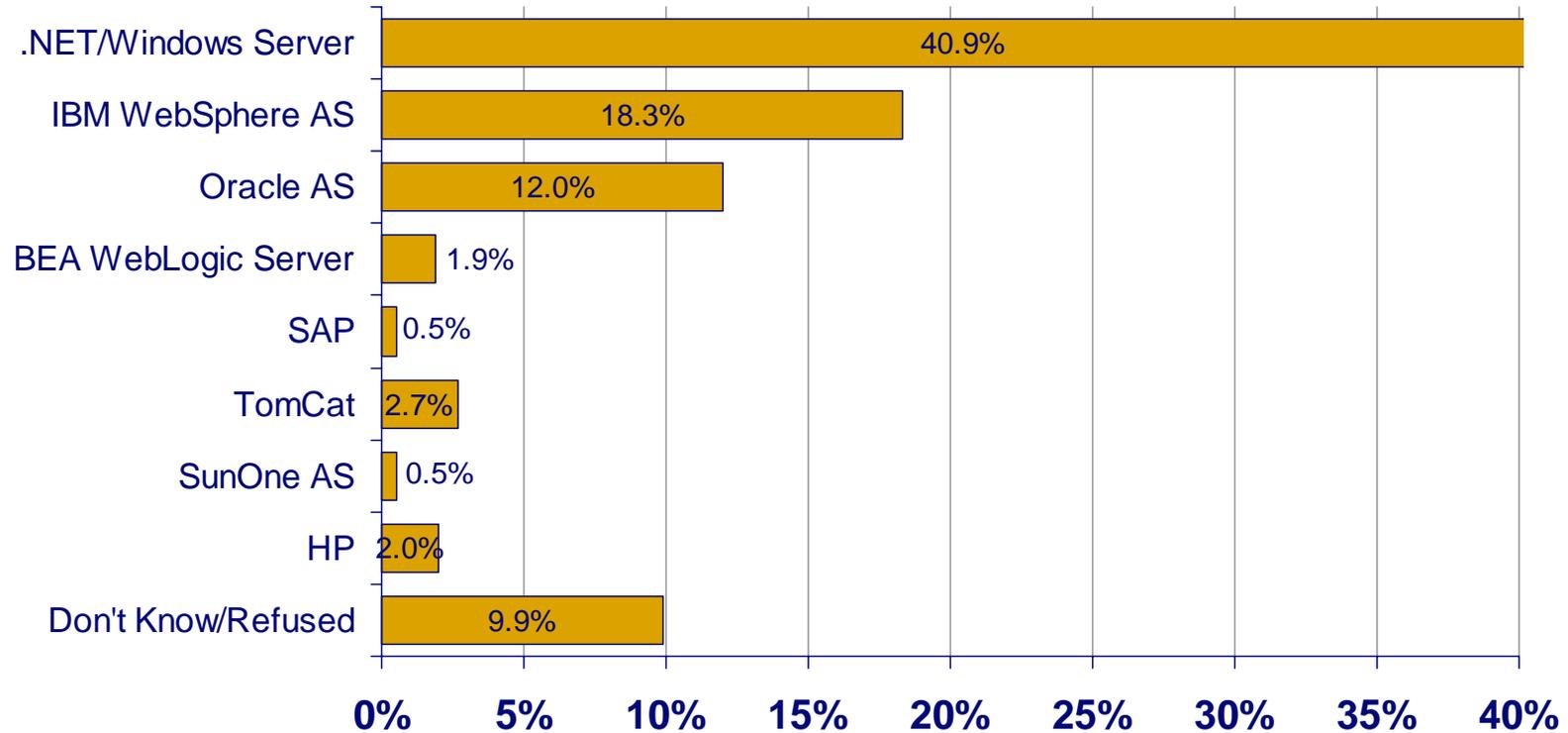
Q29: What is the main application server for this application?
(Read list as necessary)



Percent of Respondents - Europe Segment

Main Application Server Used on Project Asia Segment

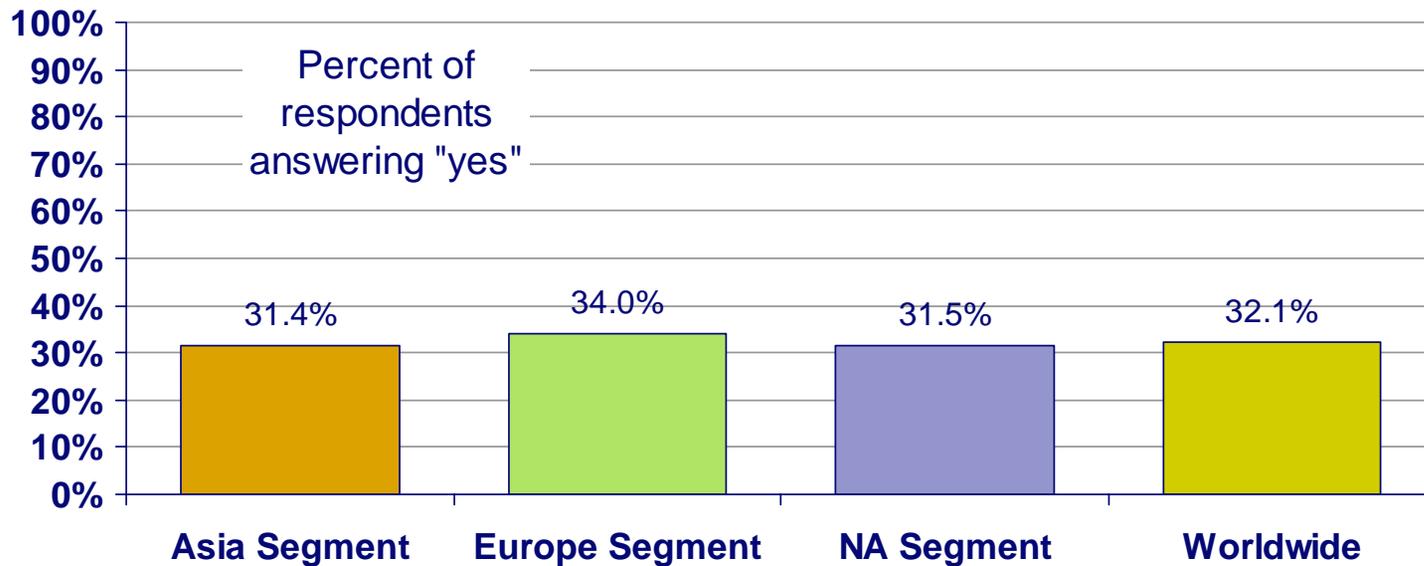
Q29: What is the main application server for this application?
(Read list as necessary)



Percent of Respondents - Asia Segment

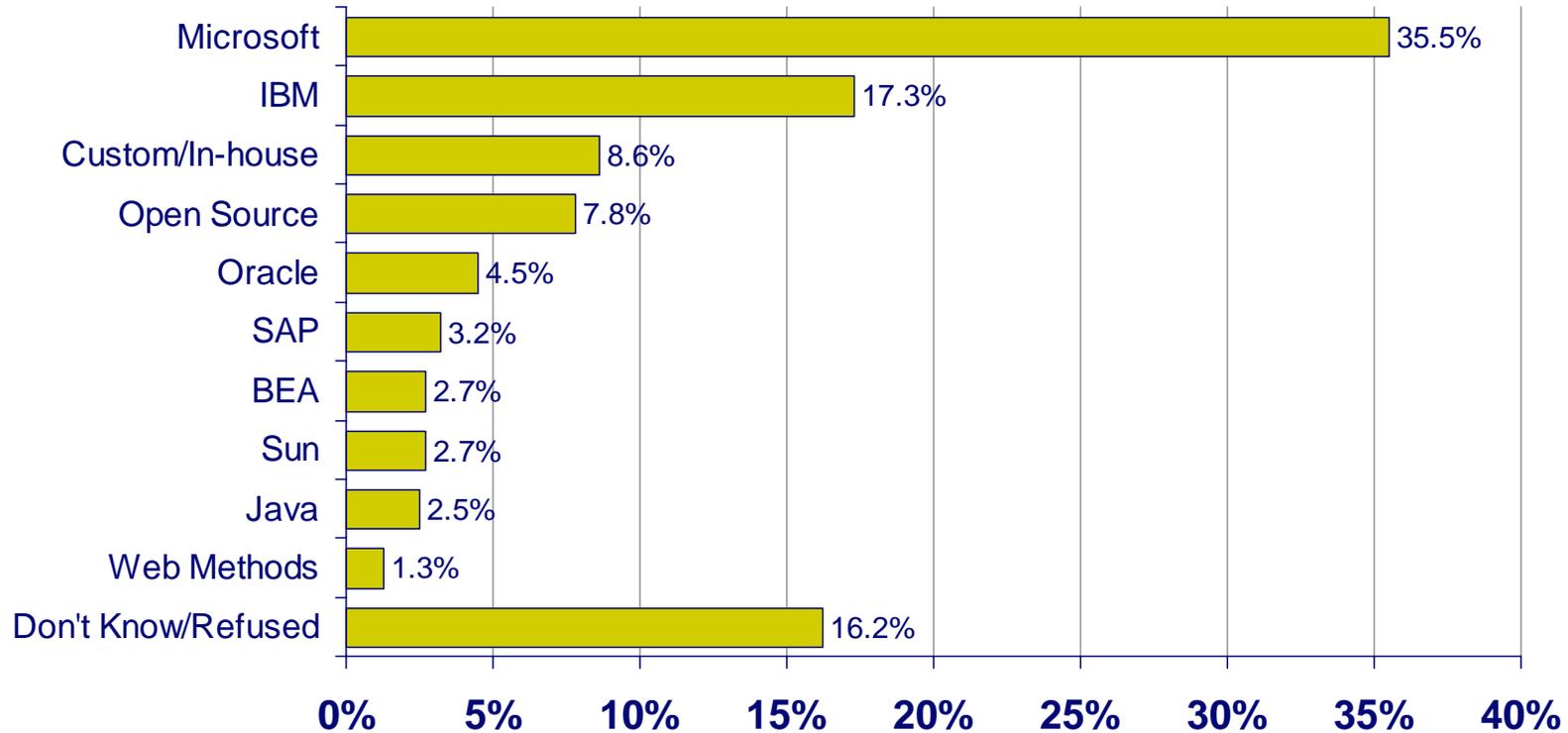
Work with Web Services Worldwide and Regional Segments

Q36: Are you currently working on any Web services?



Vendors Used for Web Services Worldwide

Q37. Which vendor's software technologies does your company use for Web services
(Multiple responses, do not read list of vendors)

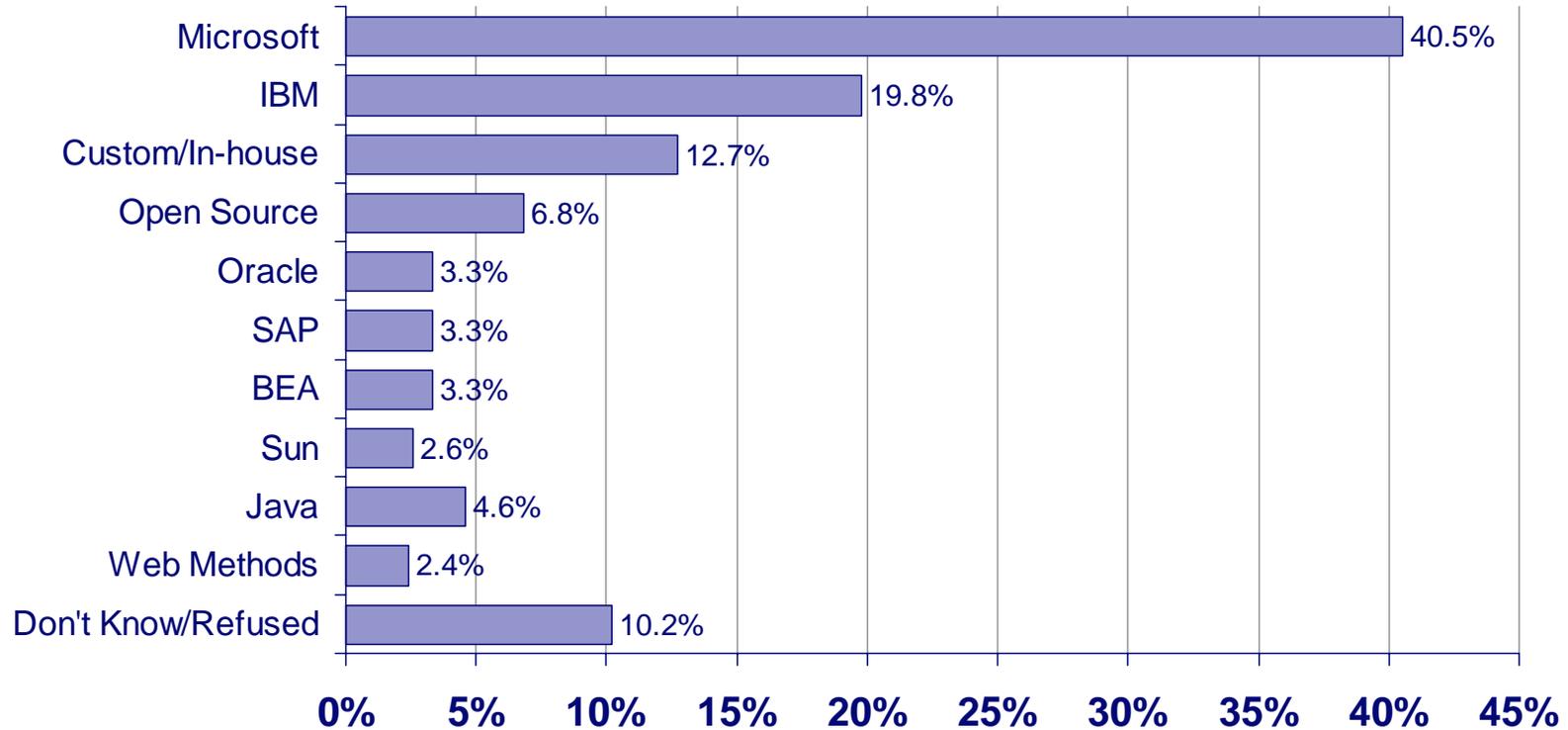


Percent of Respondents - Worldwide

Vendors Used for Web Services

NA Segment

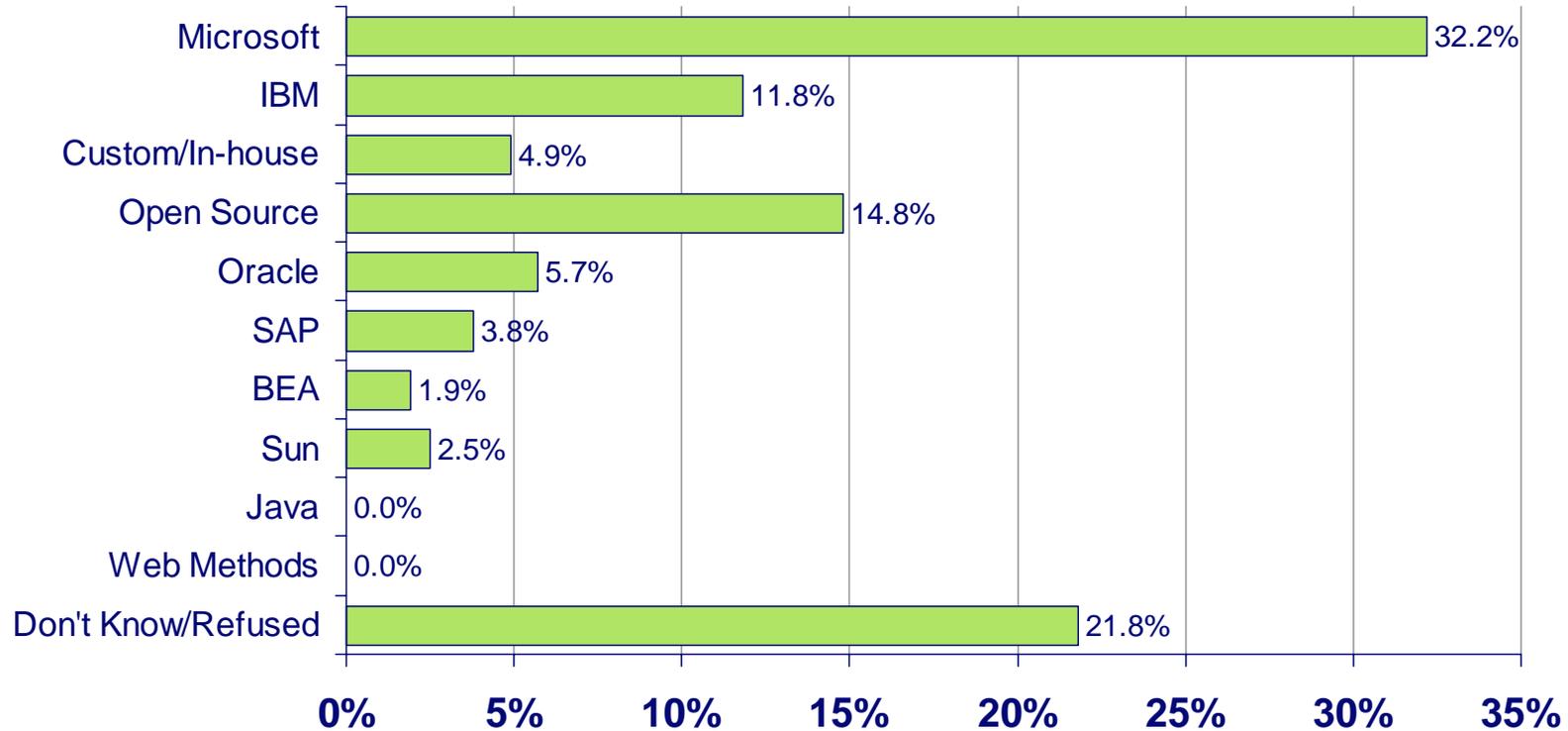
Q37. Which vendor's software technologies does your company use for Web services
(Multiple responses, do not read list of vendors)



Percent of Respondents - NA Segment

Vendors Used for Web Services Europe Segment

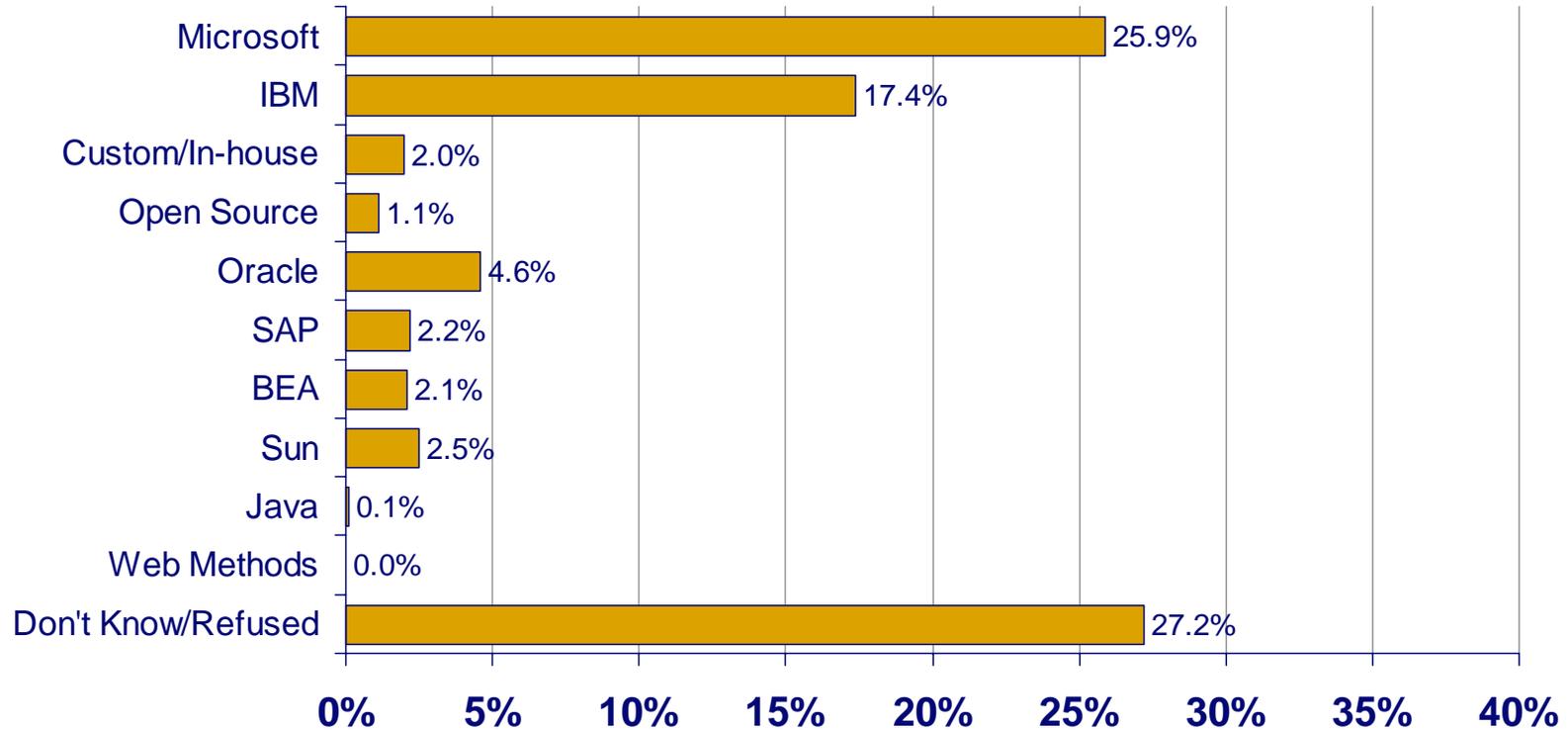
Q37. Which vendor's software technologies does your company use for Web services
(Multiple responses, do not read list of vendors)



Percent of Respondents - Europe Segment

Vendors Used for Web Services Asia Segment

Q37. Which vendor's software technologies does your company use for Web services?
(Multiple responses, do not read list of vendors)

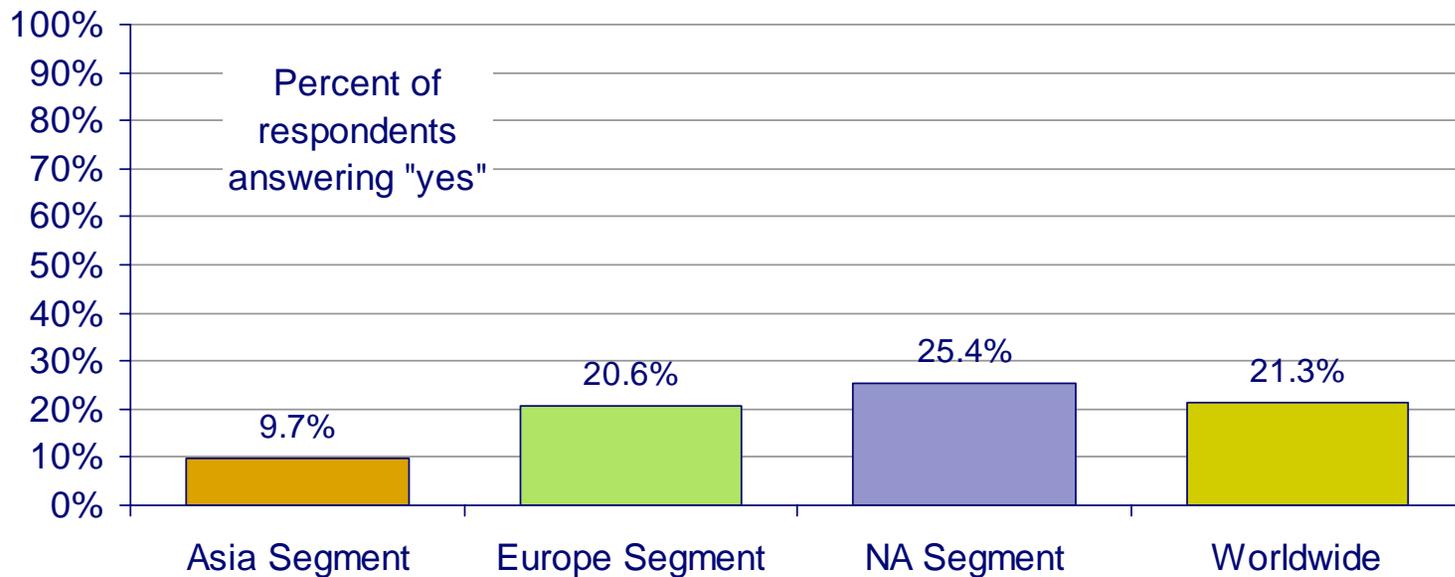


Percent of Respondents - Asia Segment

Work With SOA

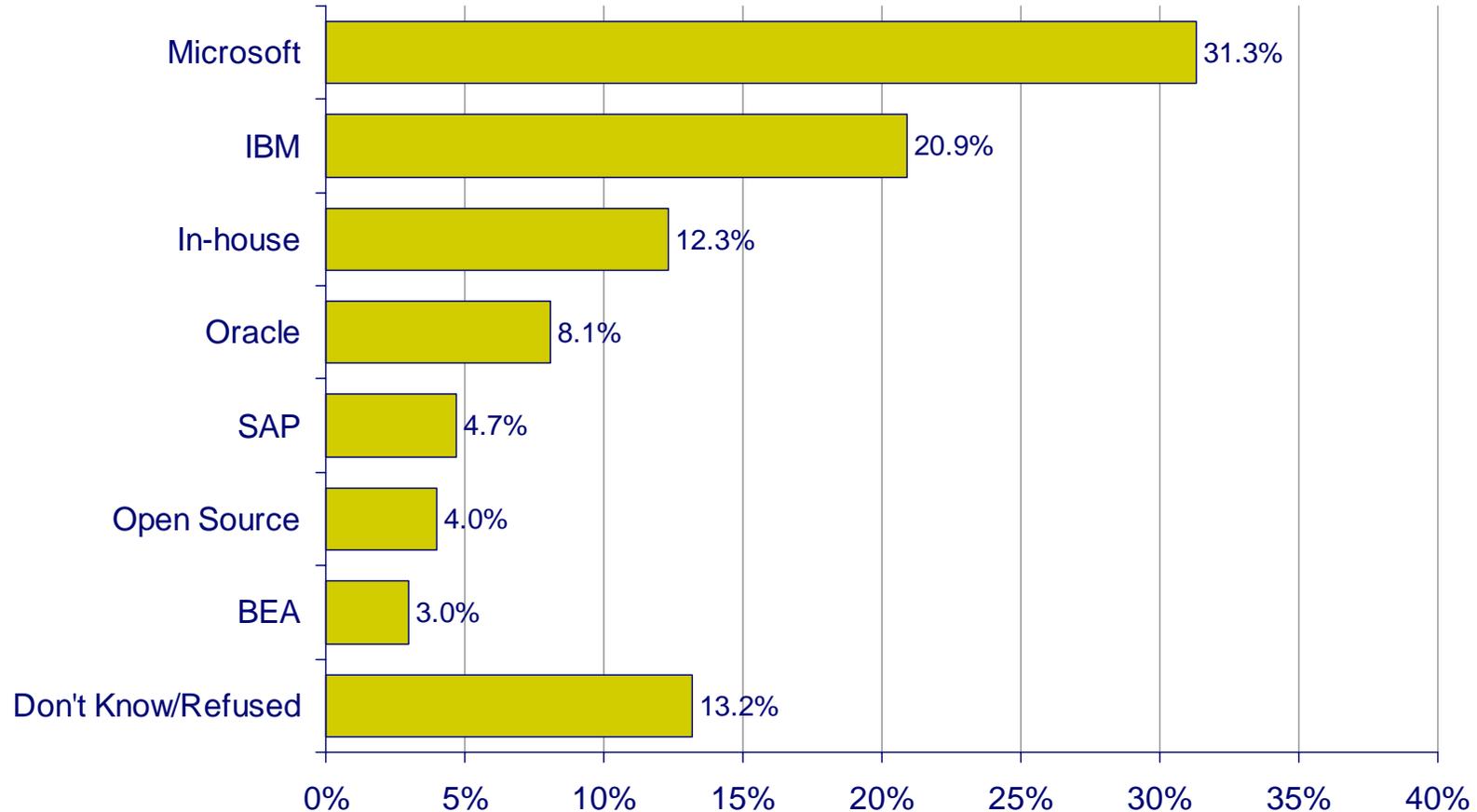
Worldwide and Regional Segments

Q38. Are you currently working on any applications that use service oriented architectures?



Vendors Used for SOA Worldwide

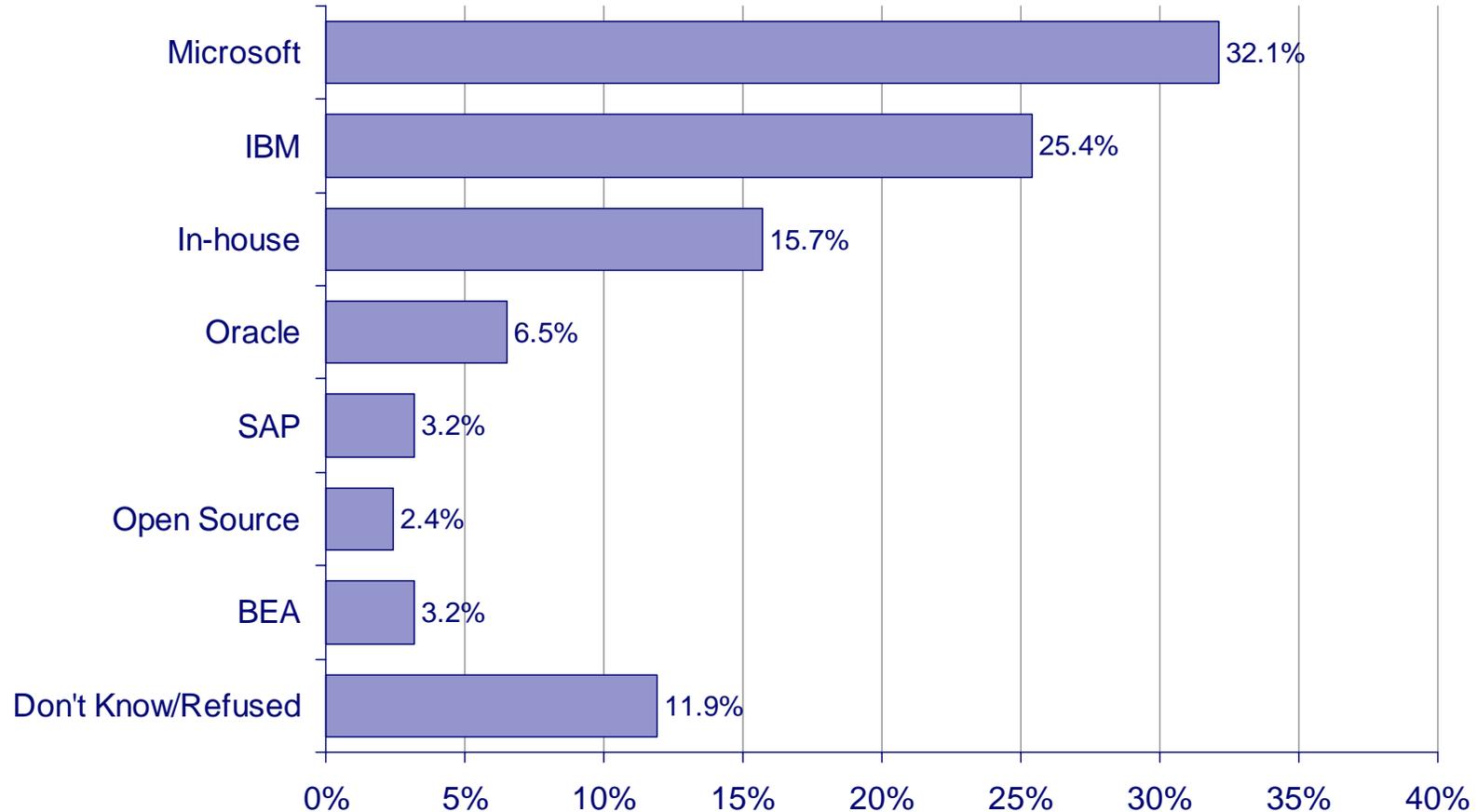
Q39. Which vendor's software technologies does your company use for applications that use service oriented architectures? *(Multiple responses, do not read list)*



Percent of Respondents - Worldwide

Vendors Used for SOA NA Segment

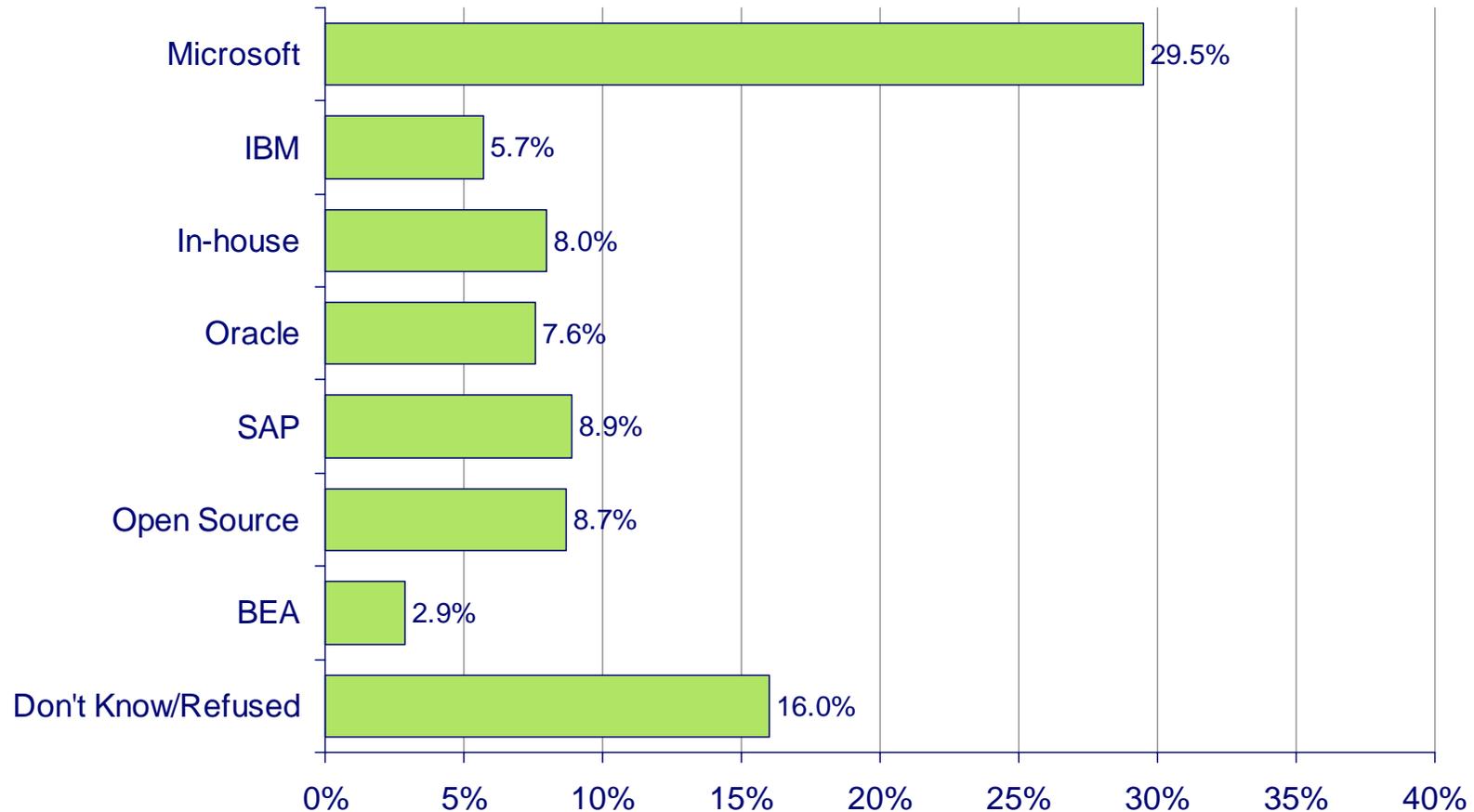
Q39. Which vendor's software technologies does your company use for applications that use service oriented architectures? *(Multiple responses, do not read list)*



Percent of Respondents - NA Segment

Vendors Used for SOA Europe Segment

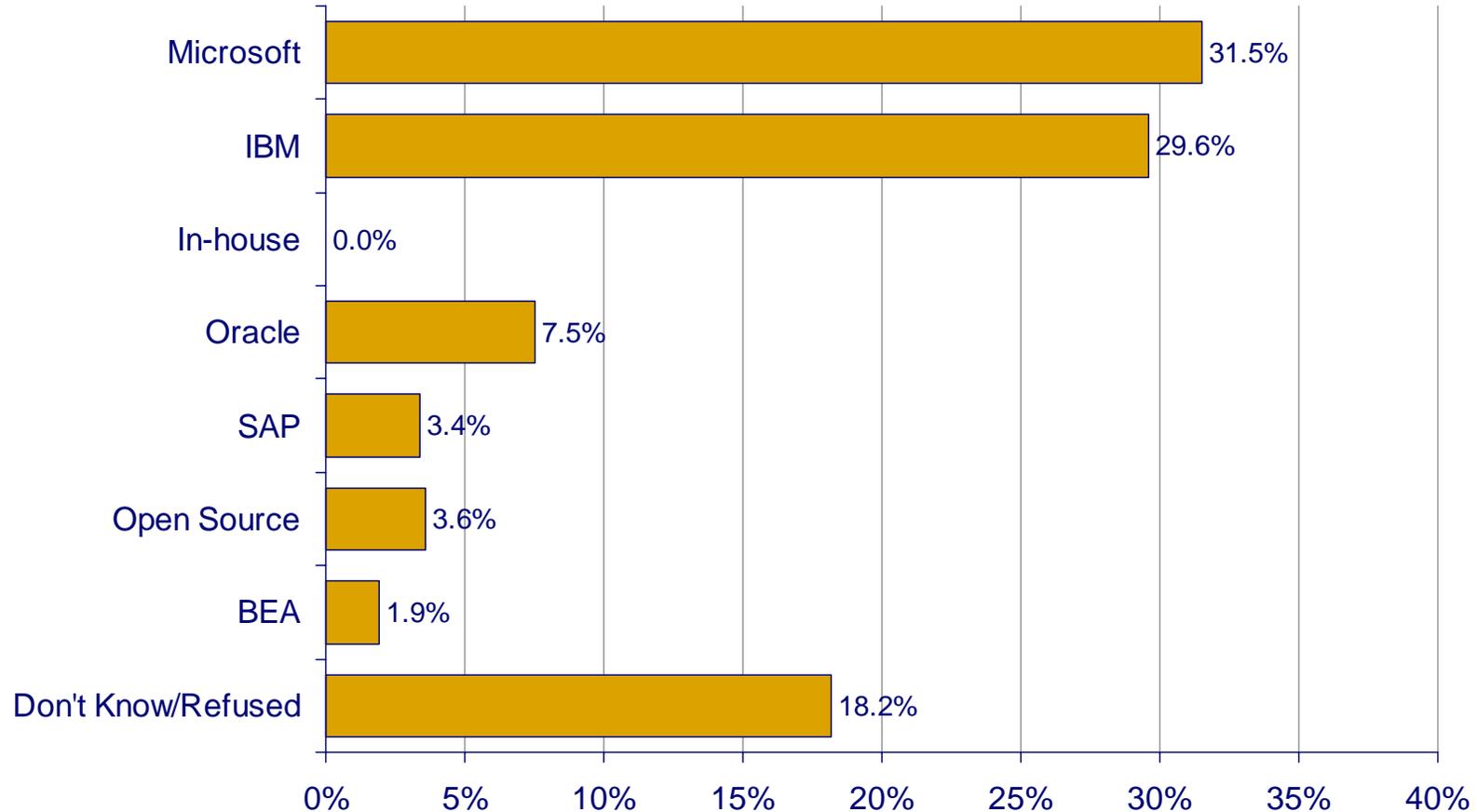
Q39. Which vendor's software technologies does your company use for applications that use service oriented architectures? (Multiple responses, do not read list)



Percent of Respondents - Europe Segment

Vendors Used for SOA Asia Segment

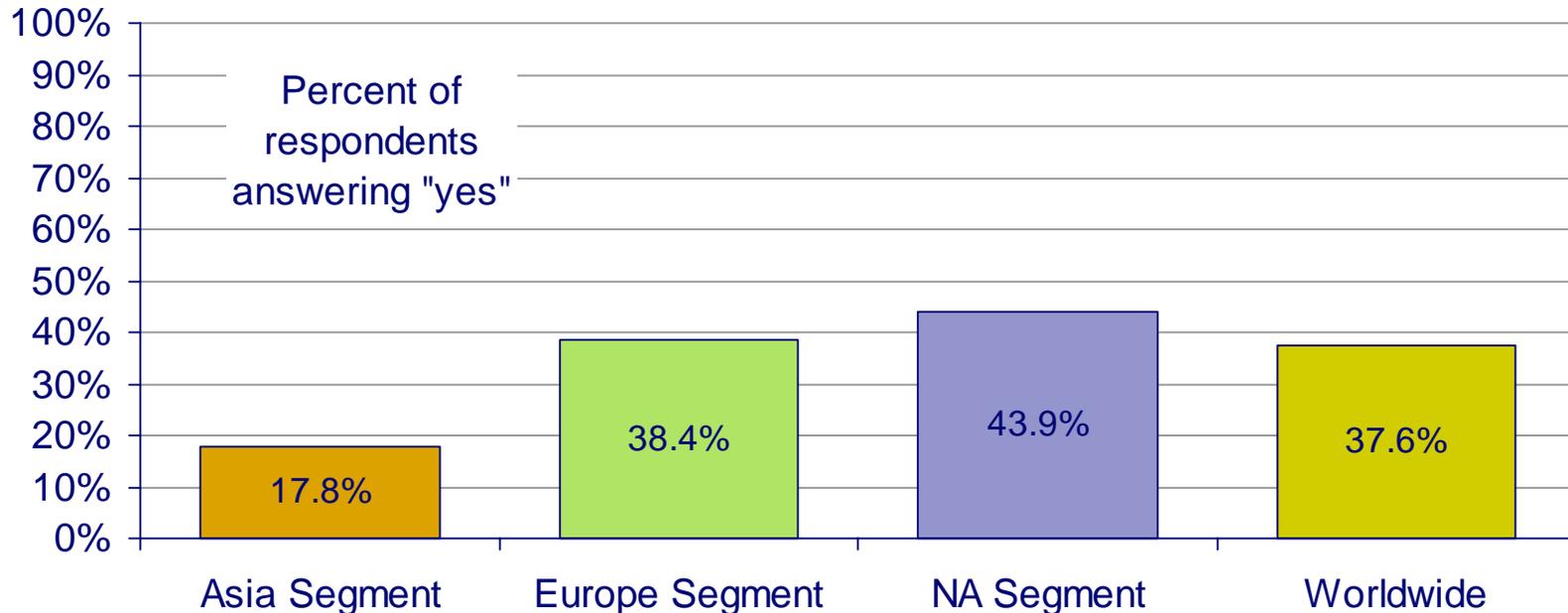
Q39. Which vendor's software technologies does your company use for applications that use service oriented architectures? *(Multiple responses, do not read list)*



Percent of Respondents - Asia Segment

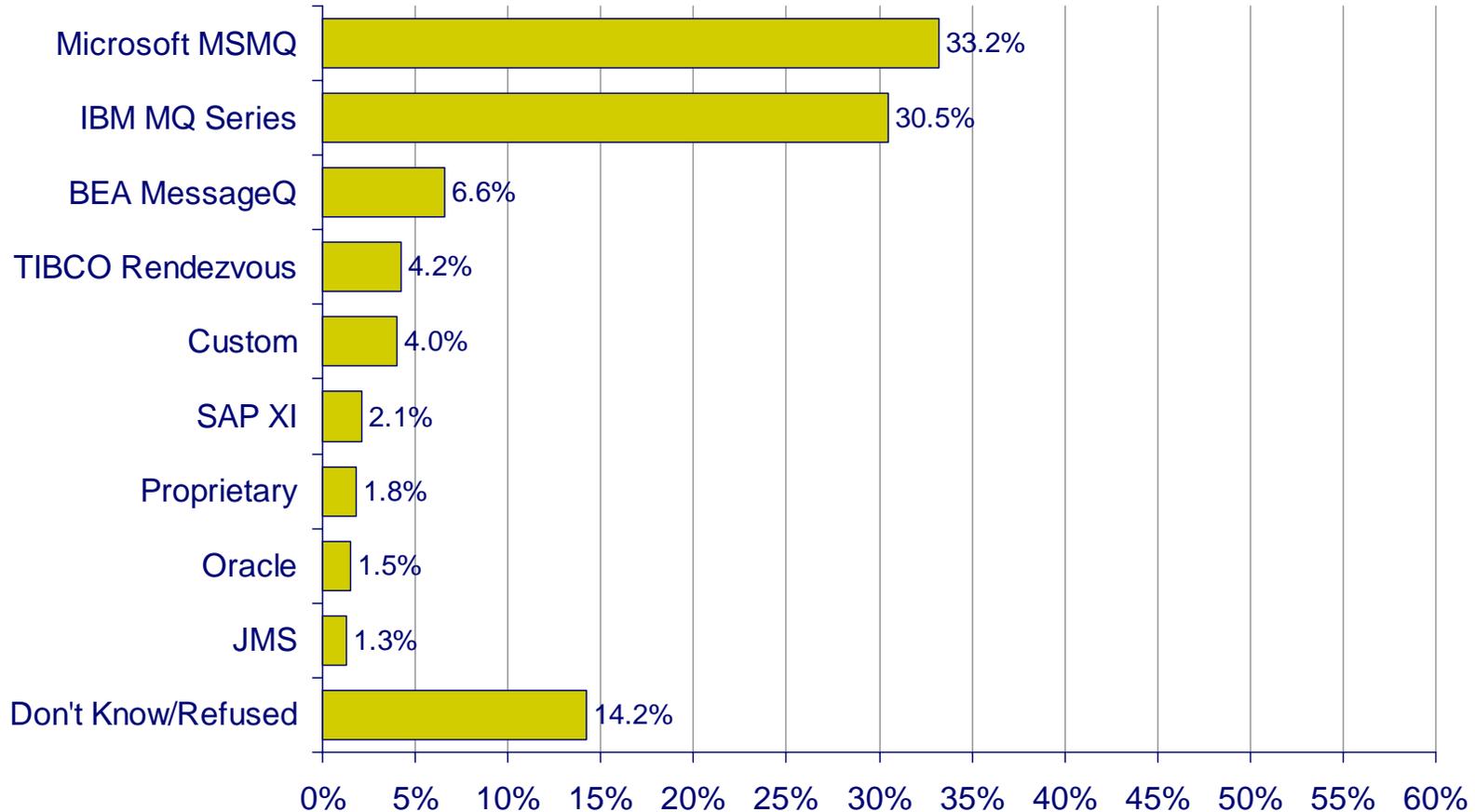
Use of Messaging or Queuing Worldwide and Regional Segments

Q43. Does your primary project or application use messaging or queuing technologies?



Messaging or Queuing Technologies Used Worldwide

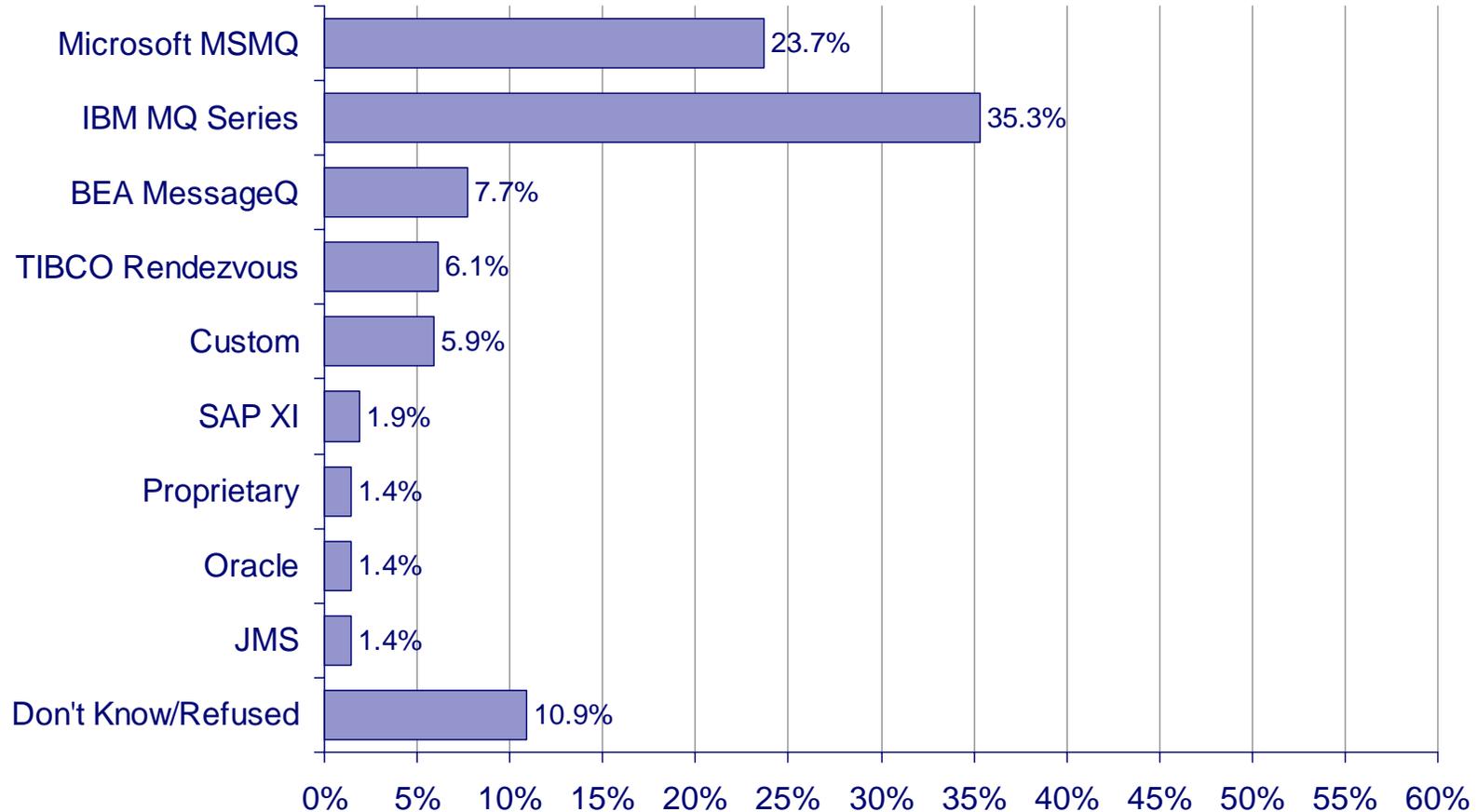
Q44. Which of the following messaging or queuing technologies does your primary project or application use? (Multiple responses, read list)



Percent of Respondents - Worldwide

Messaging or Queuing Technologies Used NA Segment

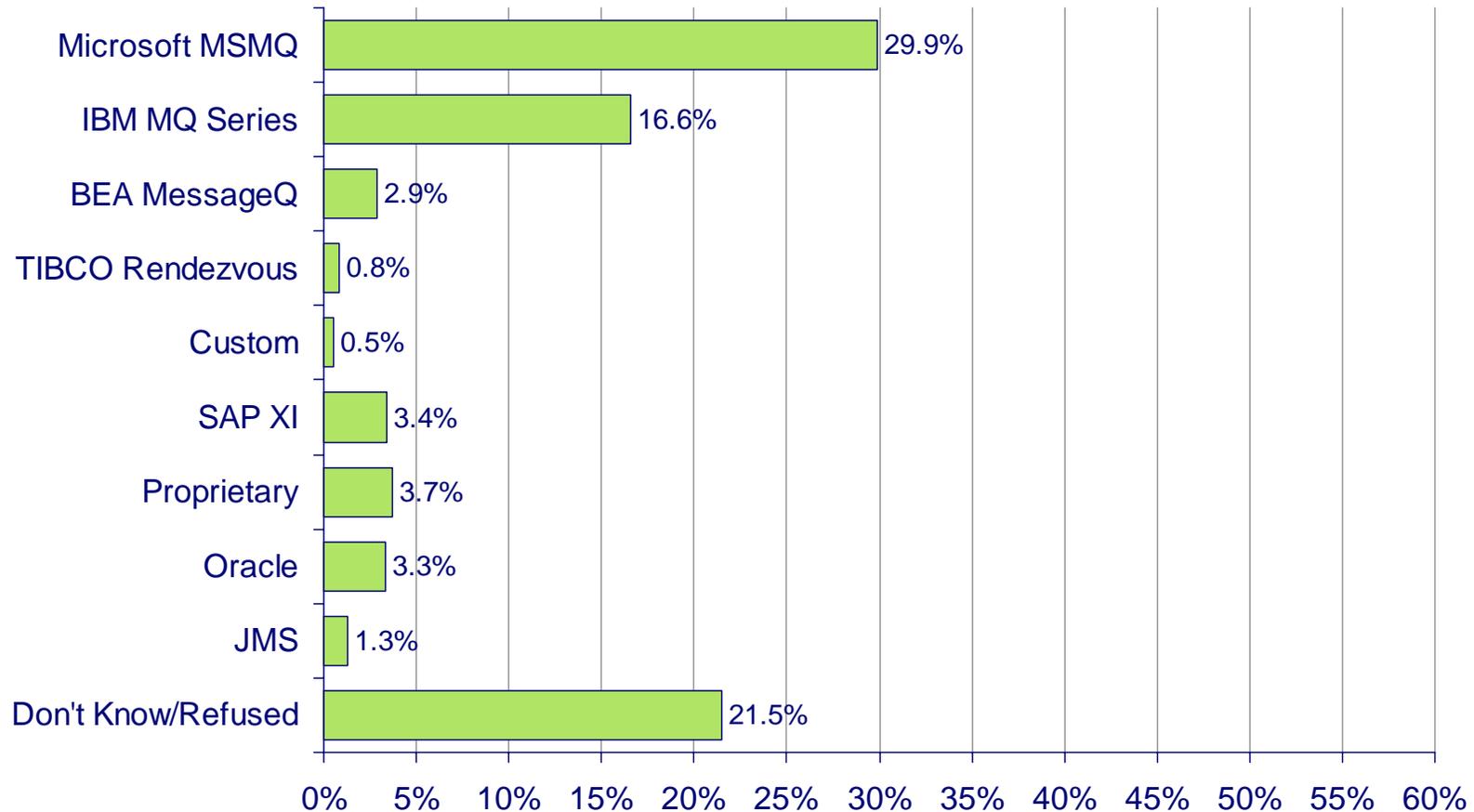
Q44. Which of the following messaging or queuing technologies does your primary project or application use? (Multiple responses, read list)



Percent of Respondents - NA Segment

Messaging or Queuing Technologies Used Europe Segment

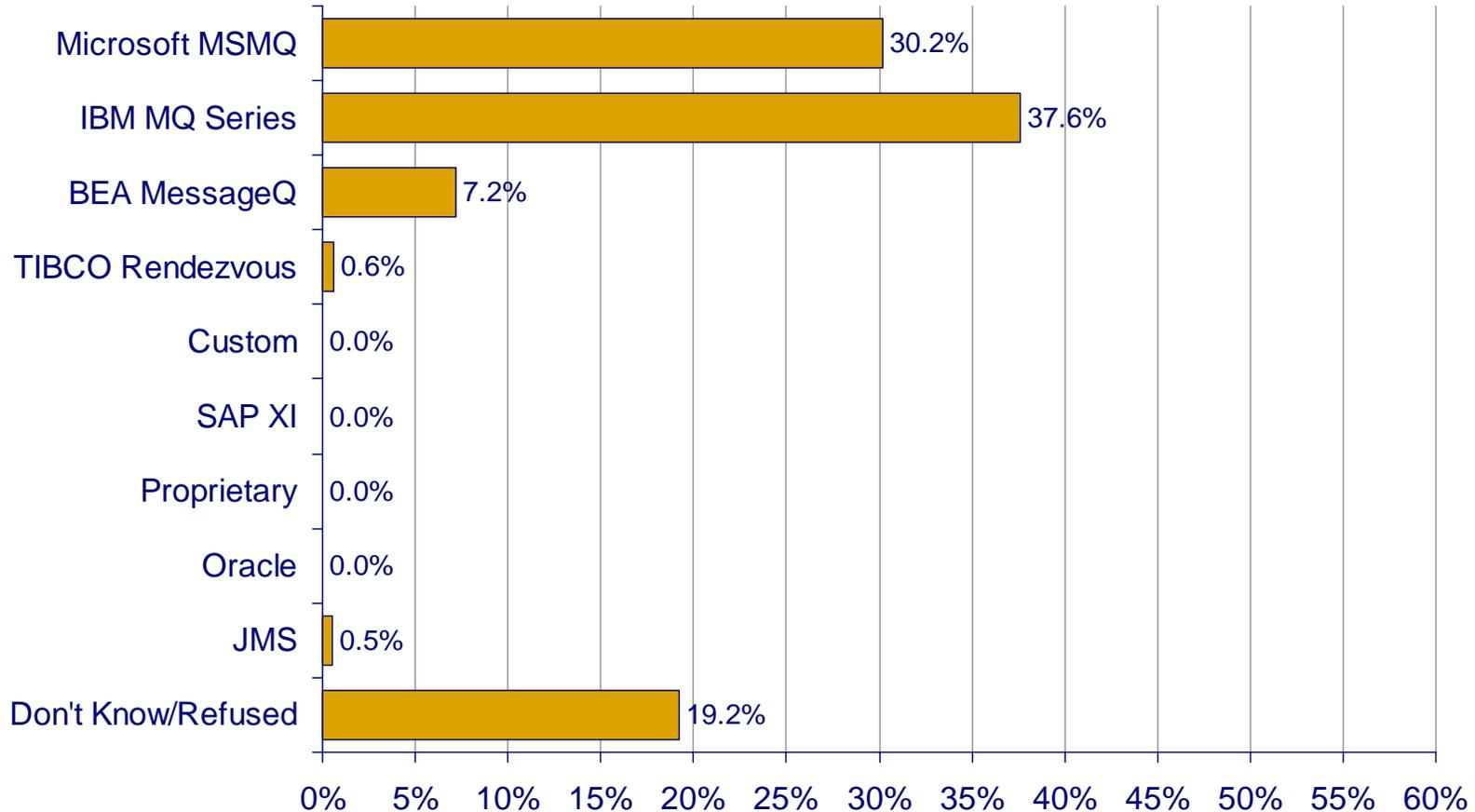
Q44. Which of the following messaging or queuing technologies does your primary project or application use? *(Multiple responses, read list)*



Percent of Respondents - Europe Segment

Messaging or Queuing Technologies Used Asia Segment

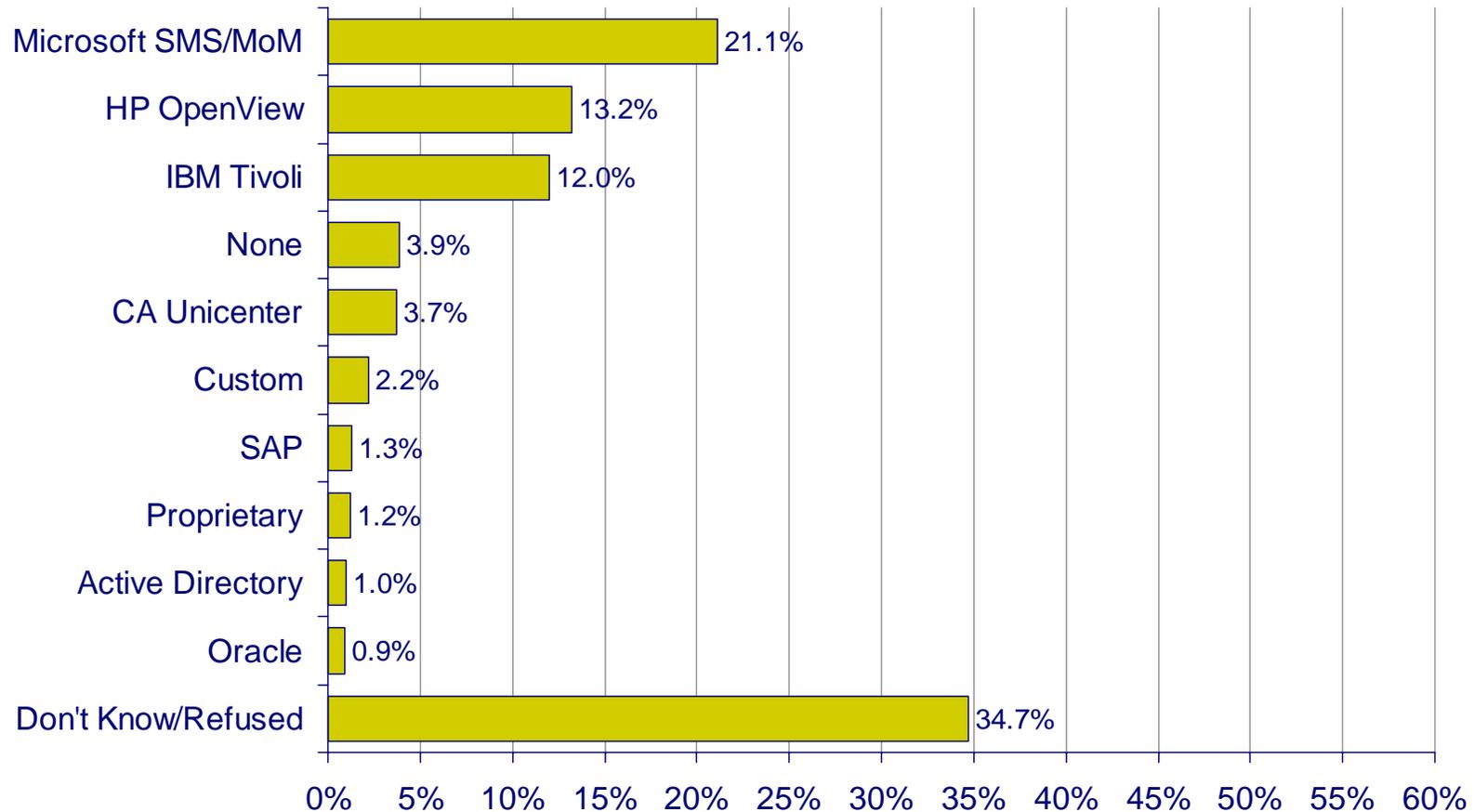
Q44. Which of the following messaging or queuing technologies does your primary project or application use? (Multiple responses, read list)



Percent of Respondents - Asia Segment

Managing & Monitoring Software Used Worldwide

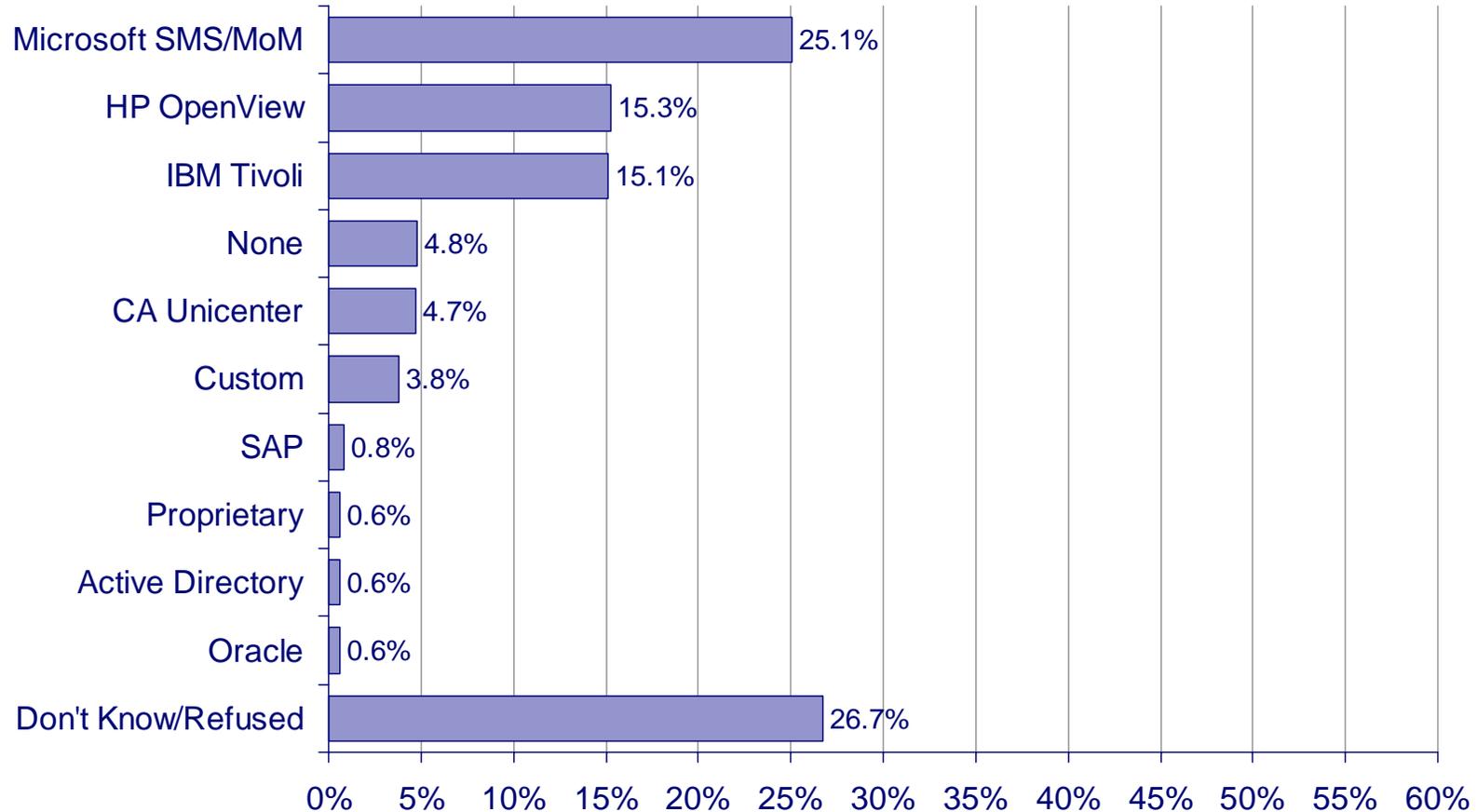
Q46. What software does your application use for managing & monitoring the production environment? *(Multiple responses)*



Percent of Respondents - Worldwide

Managing & Monitoring Software Used NA Segment

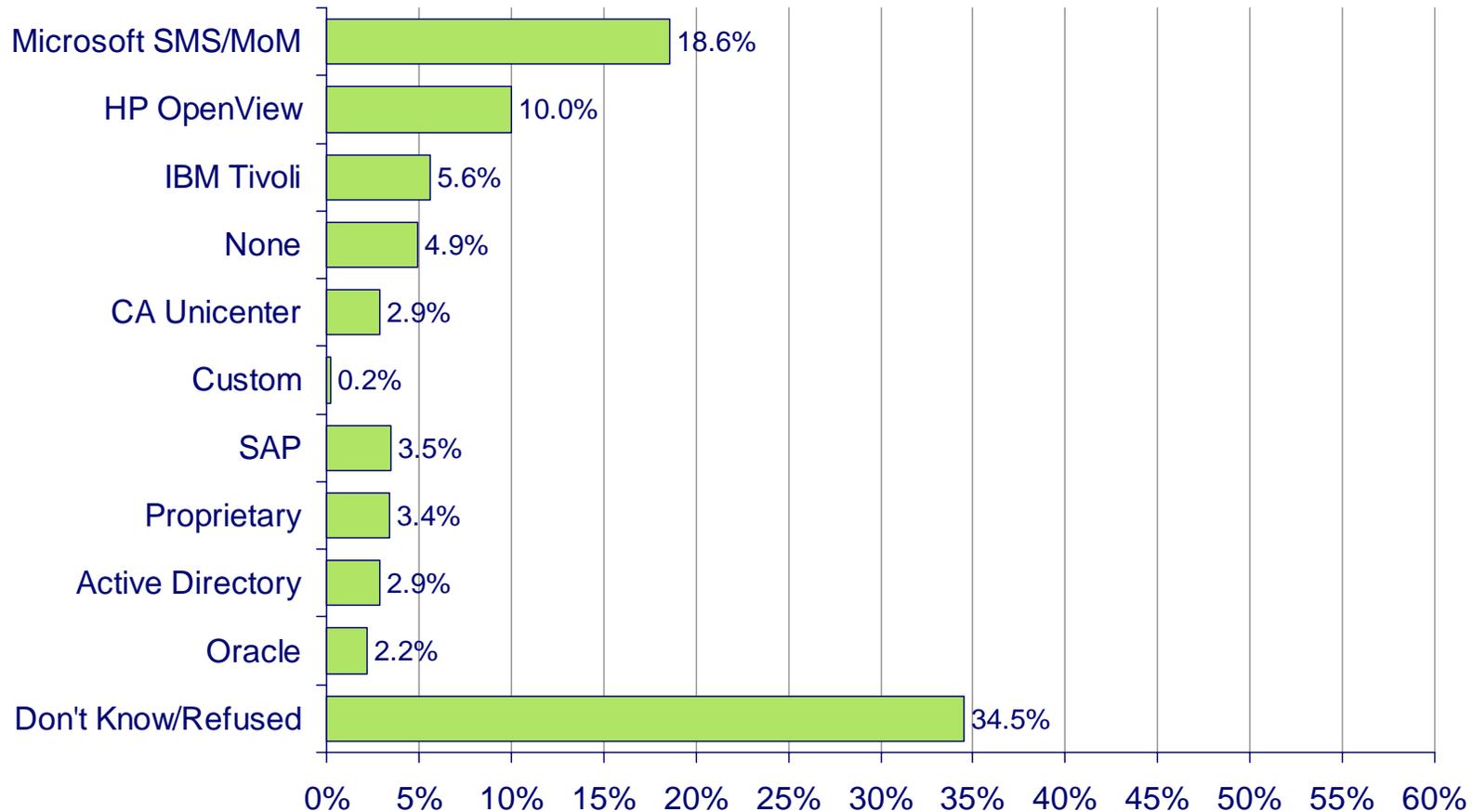
Q46. What software does your application use for managing & monitoring the production environment? *(Multiple responses)*



Percent of Respondents - NA Segment

Managing & Monitoring Software Used Europe Segment

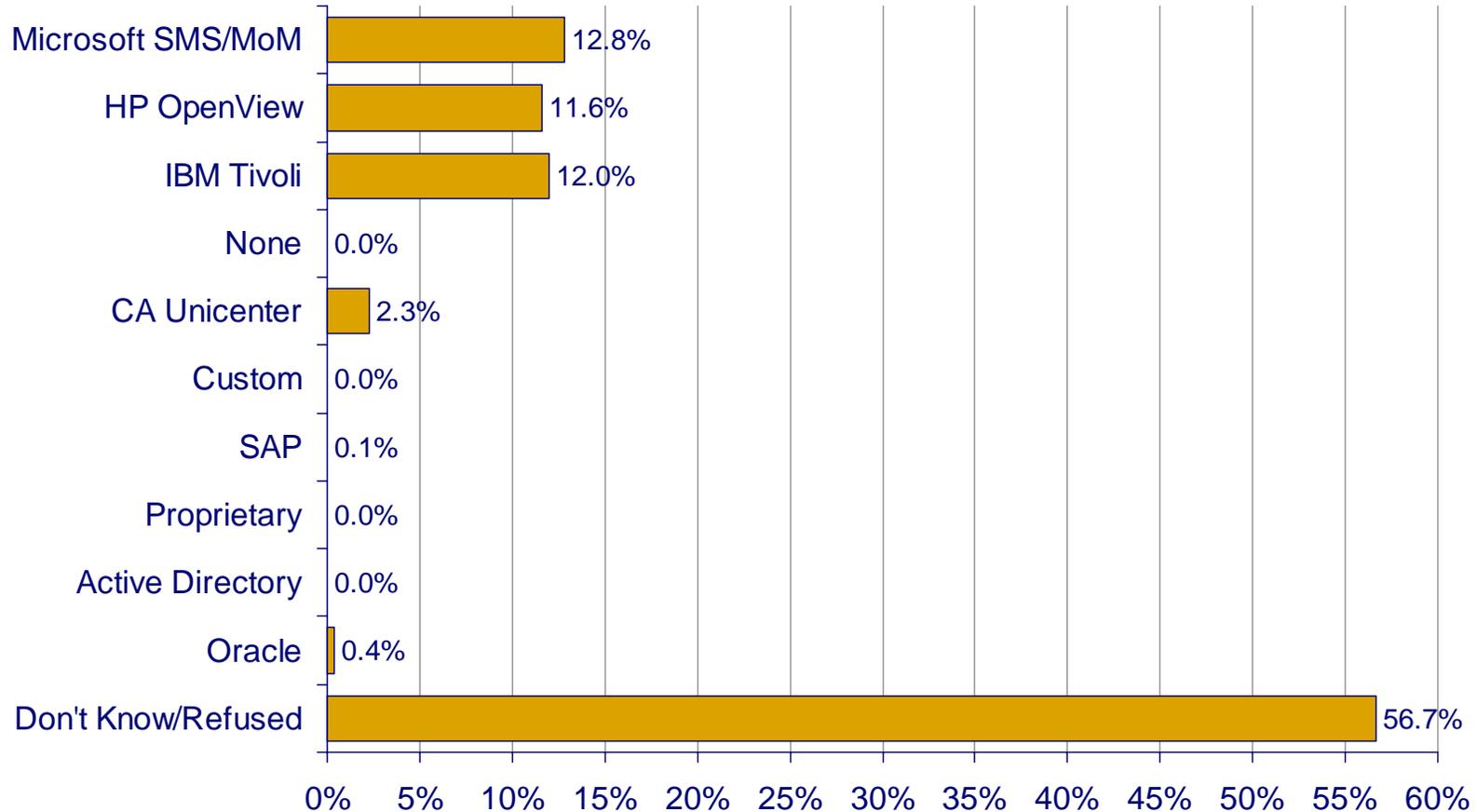
Q46. What software does your application use for managing & monitoring the production environment? *(Multiple responses)*



Percent of Respondents - Europe Segment

Managing & Monitoring Software Used Asia Segment

Q46. What software does your application use for managing & monitoring the production environment? *(Multiple responses)*

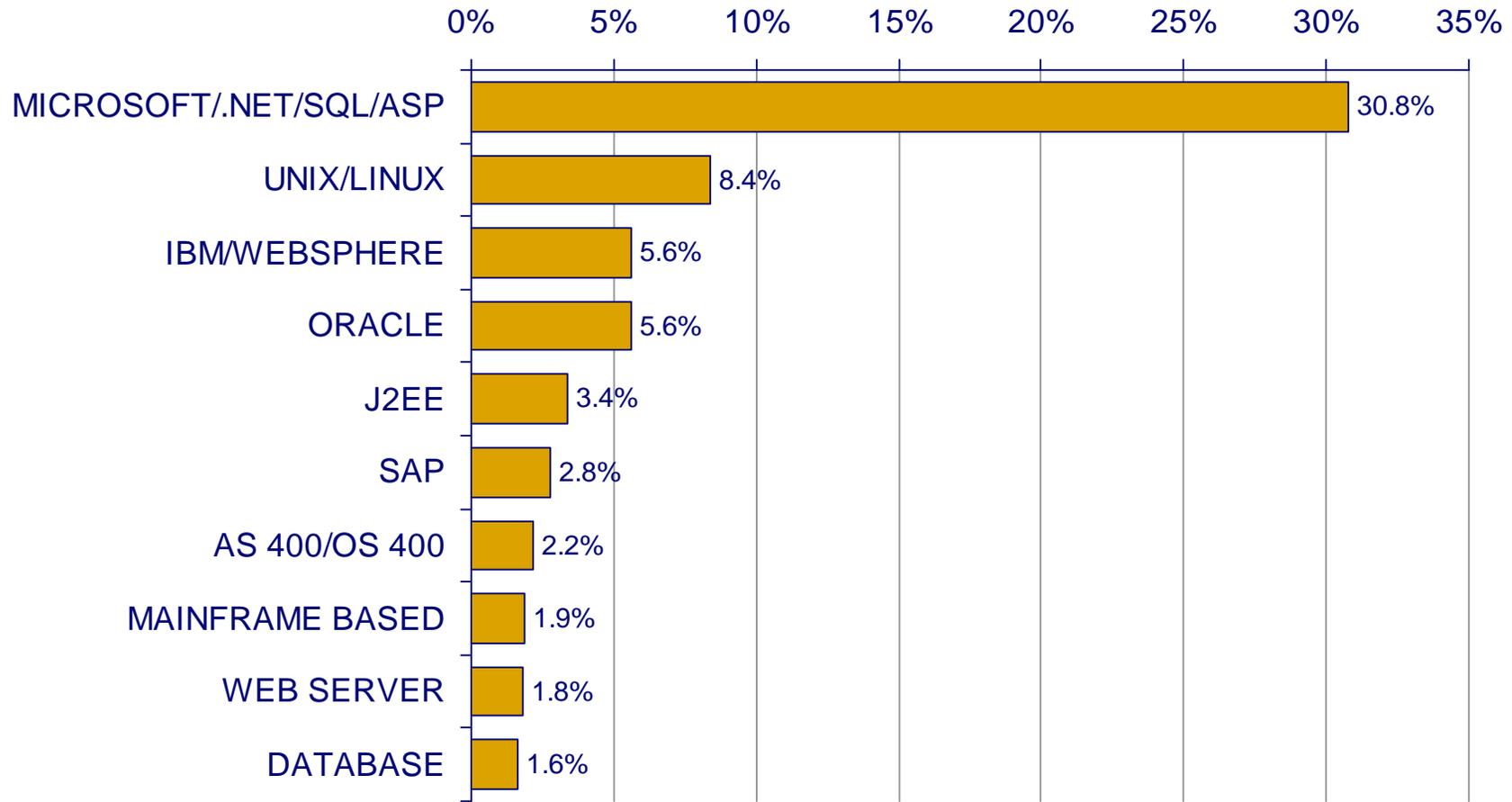


Percent of Respondents - Asia Segment

Key Research Areas

Worldwide - Primary Application Description (1/2)

Q47. What key platform technology would you say your application relies upon the most?

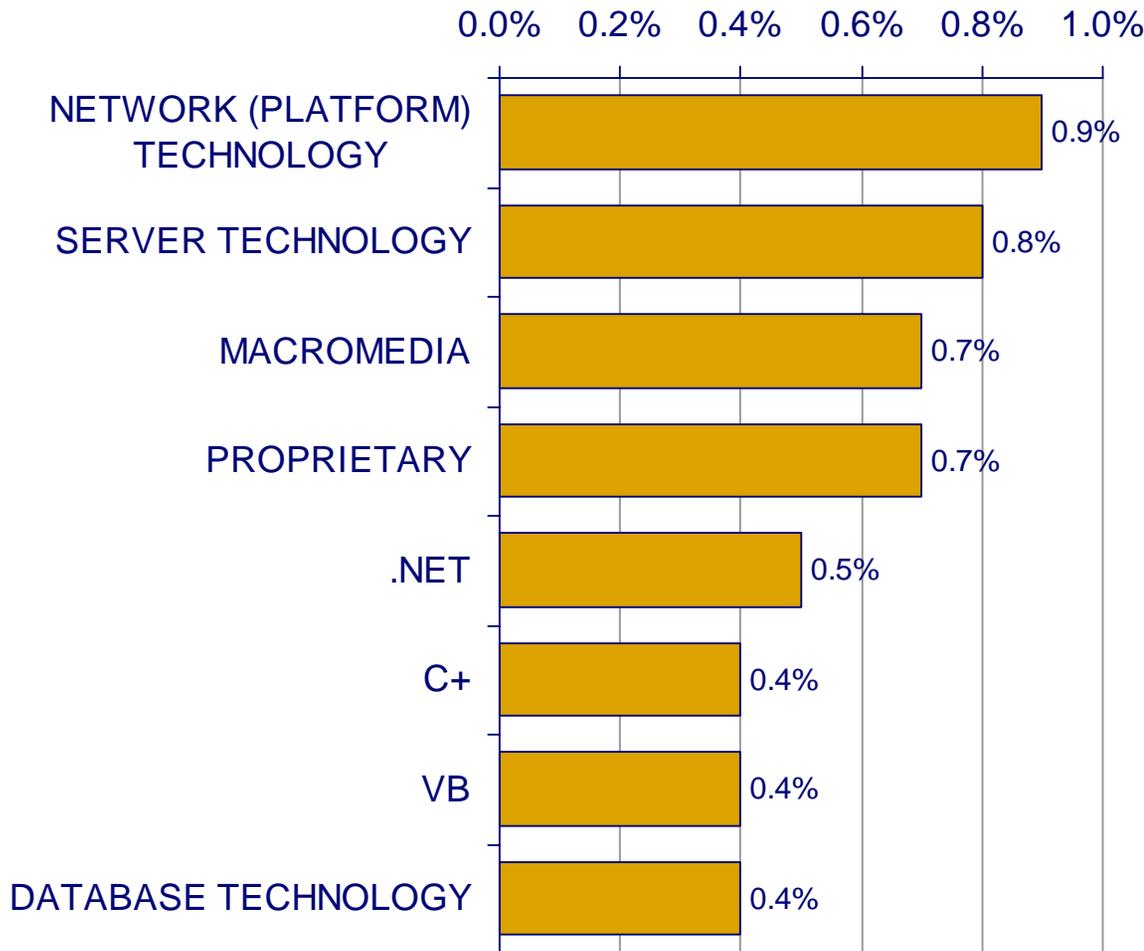


Percent of Respondents - Worldwide

Key Research Areas

Worldwide - Primary Application Description (2/2)

Q47. What key platform technology would you say your application relies upon the most?



List of mentions – less than 0.4%

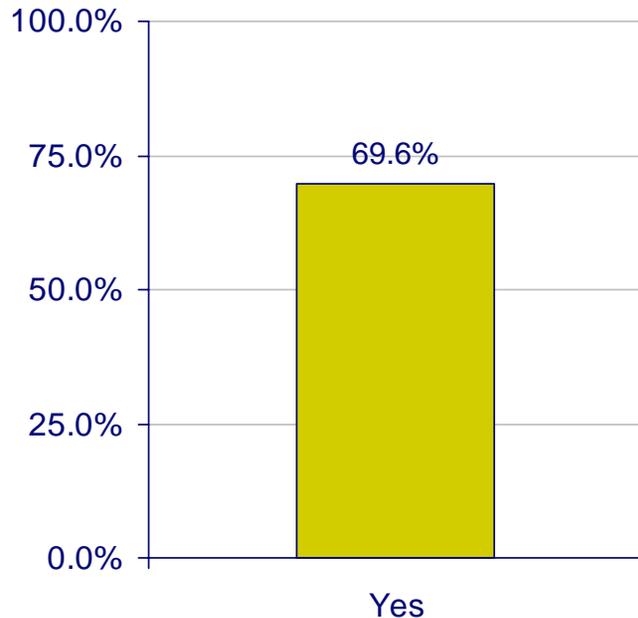
Active directory
 Cisco
 PC
 Bea weblogic
 Fujitsu
 Zserver
 PHP
 Dbms
 Acos-4
 Novell
 IMS
 Asset view
 Nec
 Tivoli
 La server
 XSP
 Informix
 Delphi

Percent of Respondents - Worldwide

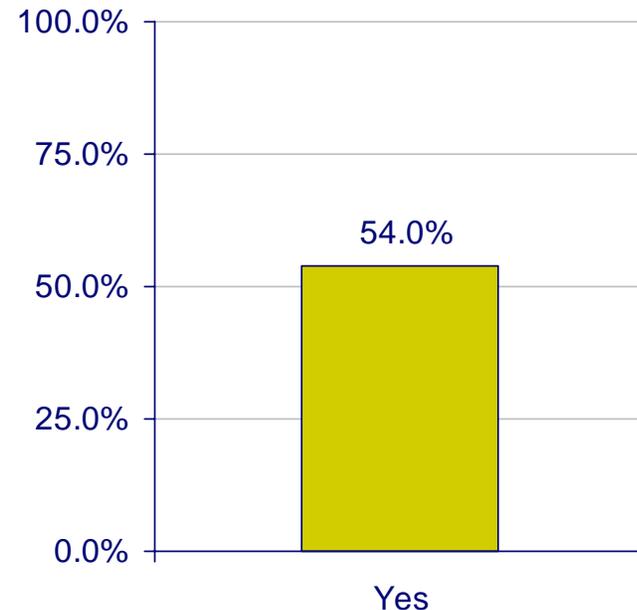
Key Research Areas

Worldwide - Standards and platform selection

Q48. Does your company have corporate standards for software platforms and applications?



Q49. Does your work involve setting standards for other teams to use or for multiple departments to use?

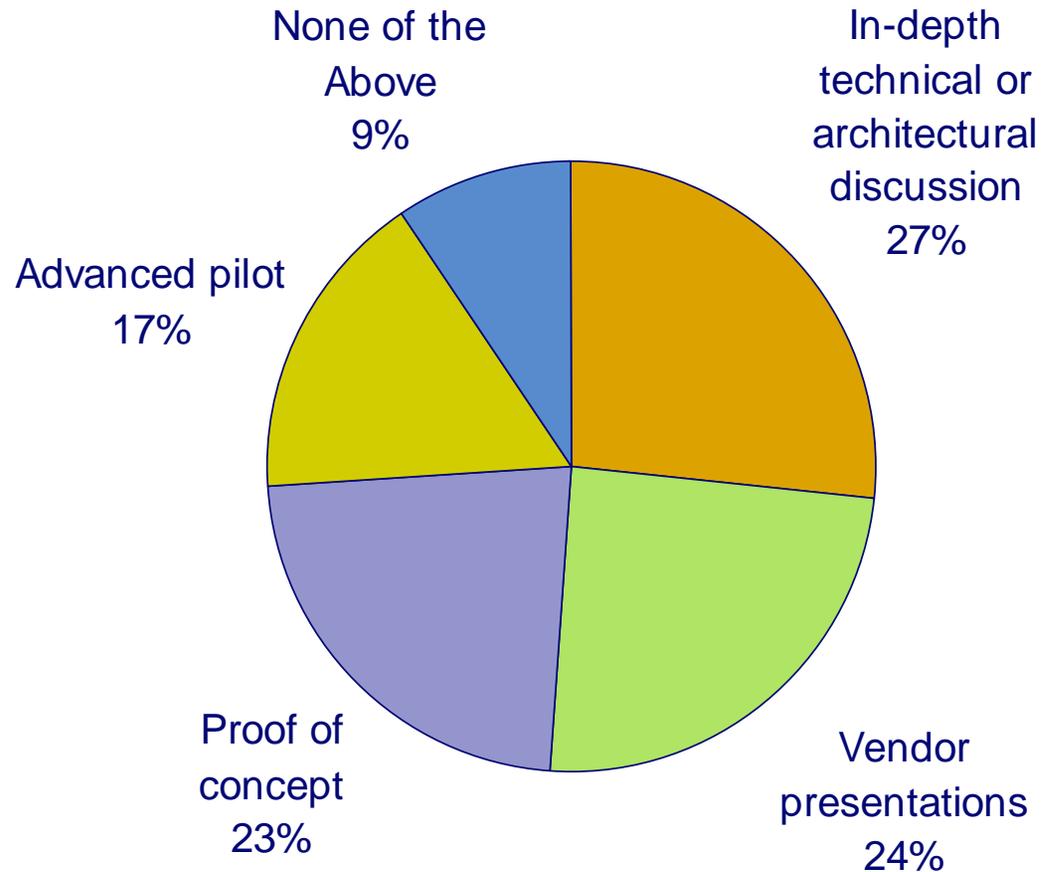


Percent of Respondents answering "Yes" - Worldwide

Key Research Areas

Worldwide - Standards and platform selection

Q50. Did you utilize any of the following presales technical help to select the standard platform?

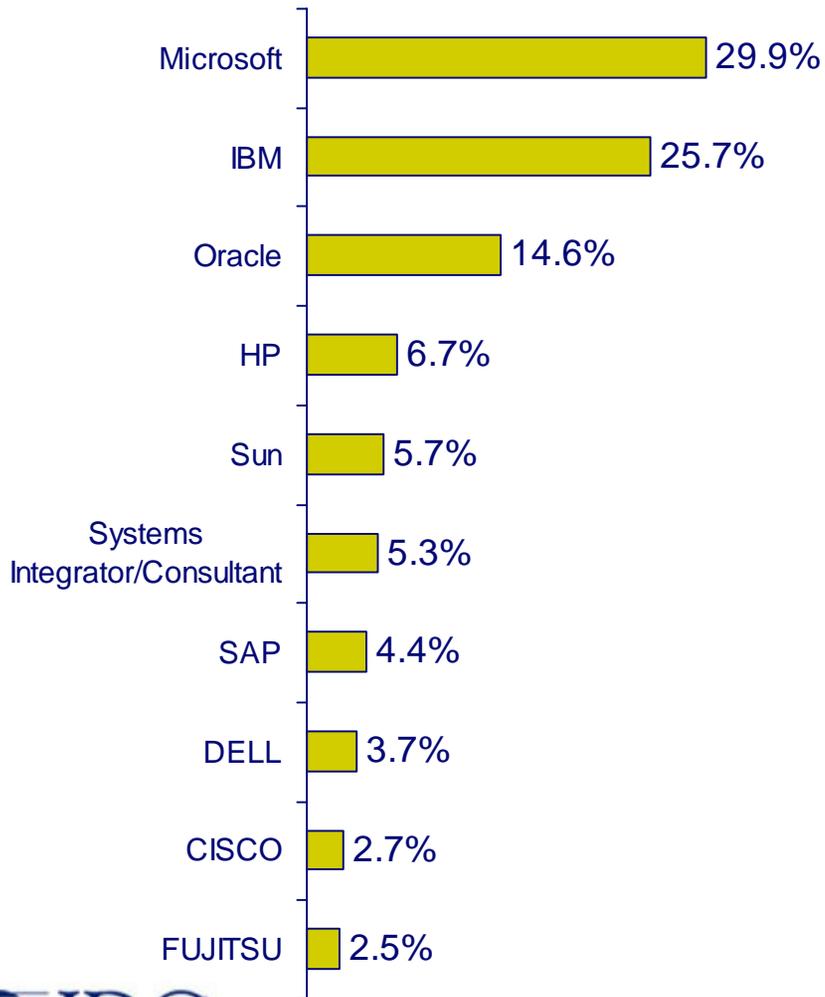


Percent of Respondents - Worldwide

Key Research Areas

Worldwide - Standards and platform selection

Q51. From which vendors did you receive these technical services?



List of mentions – less than 2.5%

IN-HOUSE
BEA
Open Source
NEC
HITACHI
SIEMENS
TIBCO
NOVELL
INTERNAL
ESRI
PEOPLESOFT
MACROMEDIA
COMPAQ

List of mentions – less than 0.7%

LOCAL
NONE
COMPUTER
ASSOCIATES/CA
APPLE
EMC
CDW
WONDERWARE
SYBASE
COGNOS
UNISYS
INFOWAVE
PEGA SYSTEMS
UNIX
PTC
CRYSTAL
ENTERPRISES
GEMINI
NTT
TOSHIBA
RICOH
JRI

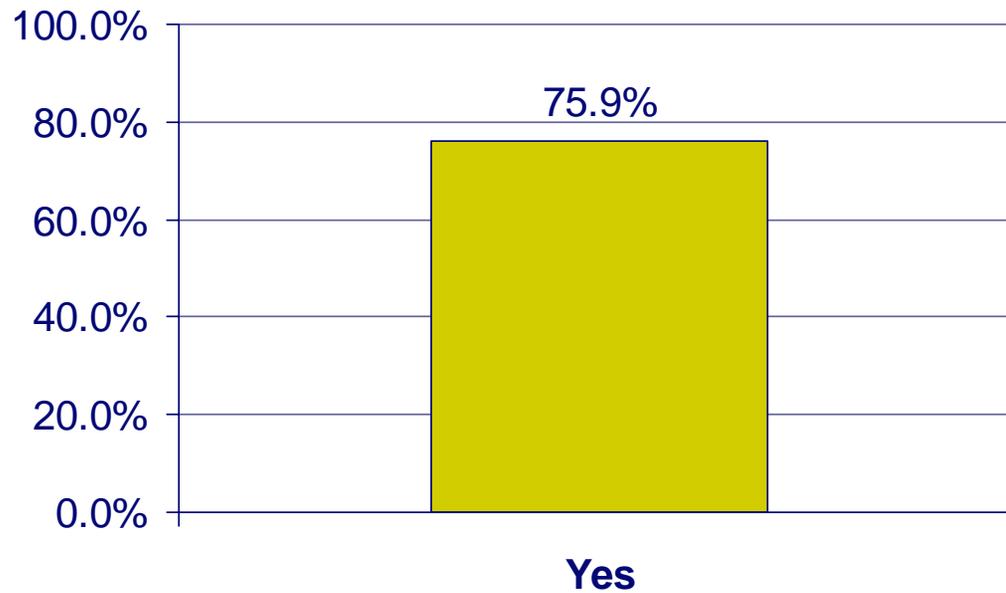
Percent of Respondents - Worldwide

Source: IDC's Mission Critical Study, July 2005, TOTAL UNWEIGHTED FREQ.=1,300

Key Research Areas

Worldwide - Standards and platform selection

Q52. Did you follow corporate standards for your primary project?

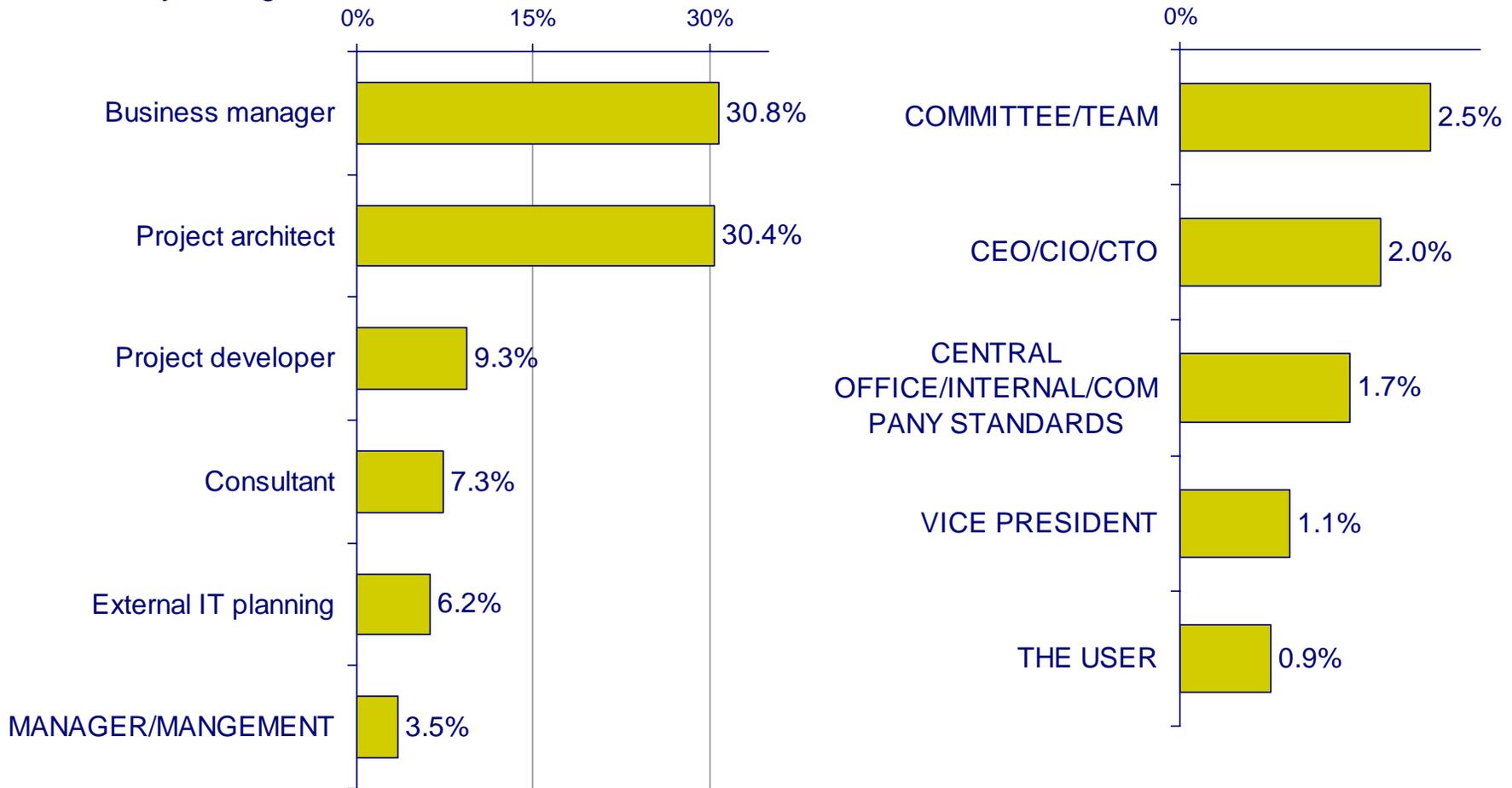


Percent of Respondents - Worldwide

Key Research Areas

Worldwide - Standards and platform selection

Q53. Which of the following was the single most influential person in making the platform decision for your organization?

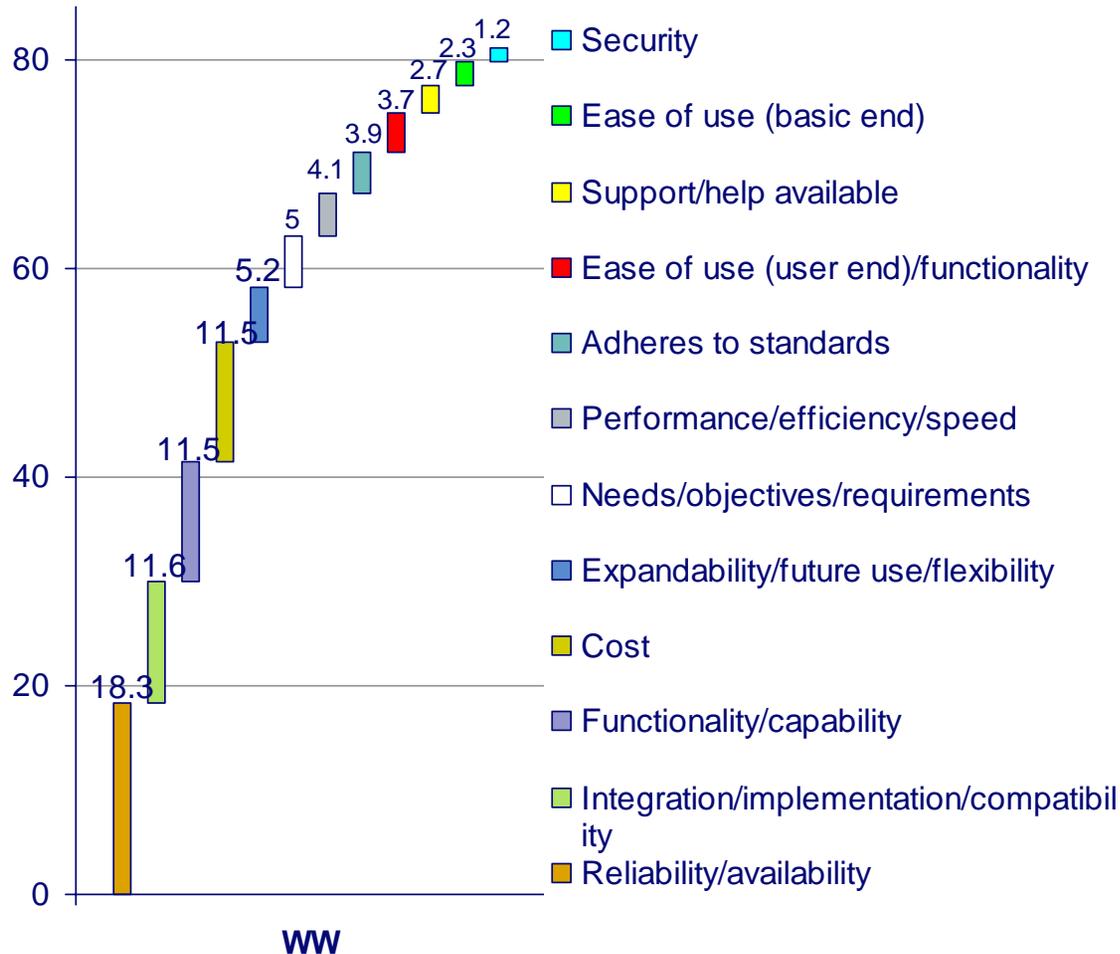


Percent of Respondents - Worldwide

Key Research Areas

Worldwide - Standards and platform selection

Q54. What is your most important criteria in making the application platform decision?



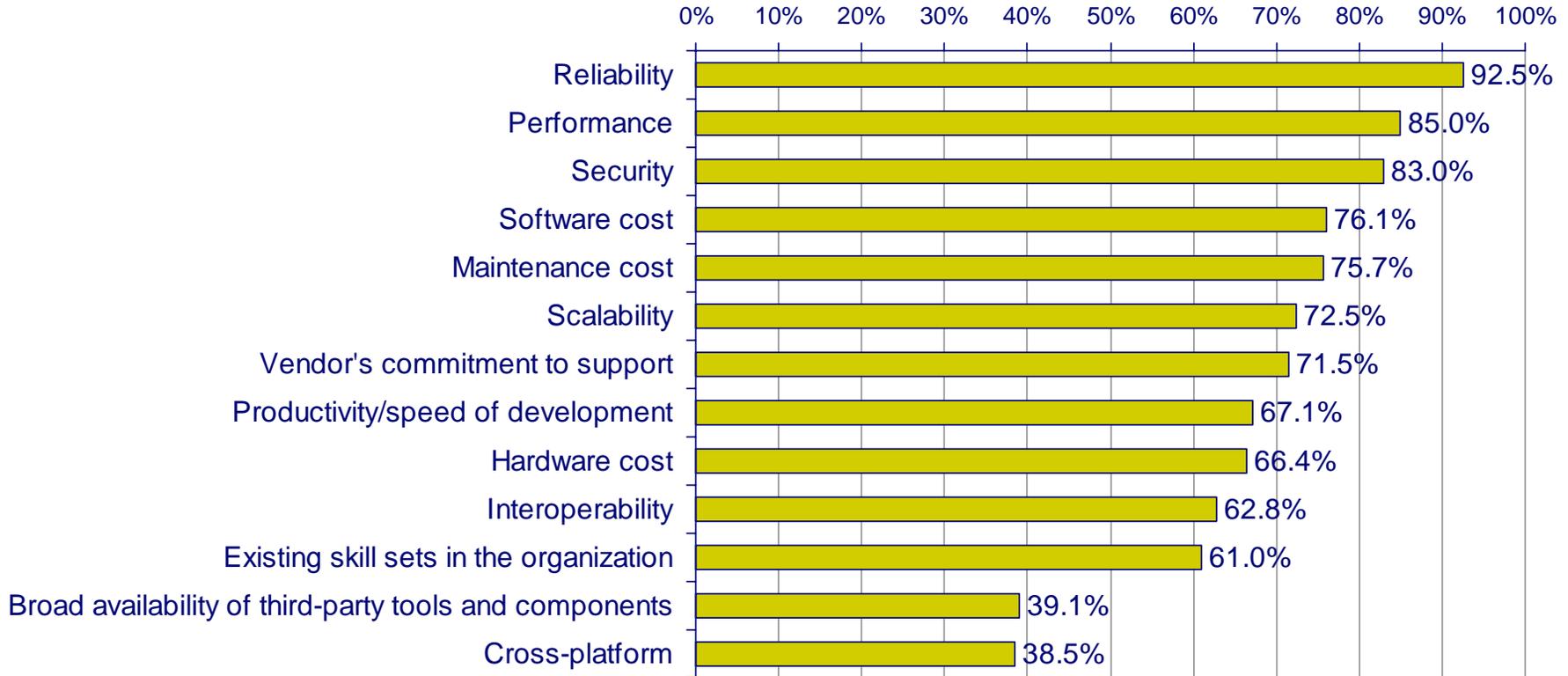
Other criteria less than 5%

- Current/popular technology
- Popularity/reputation
- Training required/existing knowledge
- The quality of the software
- According to the development of the company
- High-cost performance
- The type of the structure
- Man-machine conversation
- Business process

Key Research Areas

Worldwide - Standards and platform selection

Q55. Which of the following criteria are important in your application platform selection process?

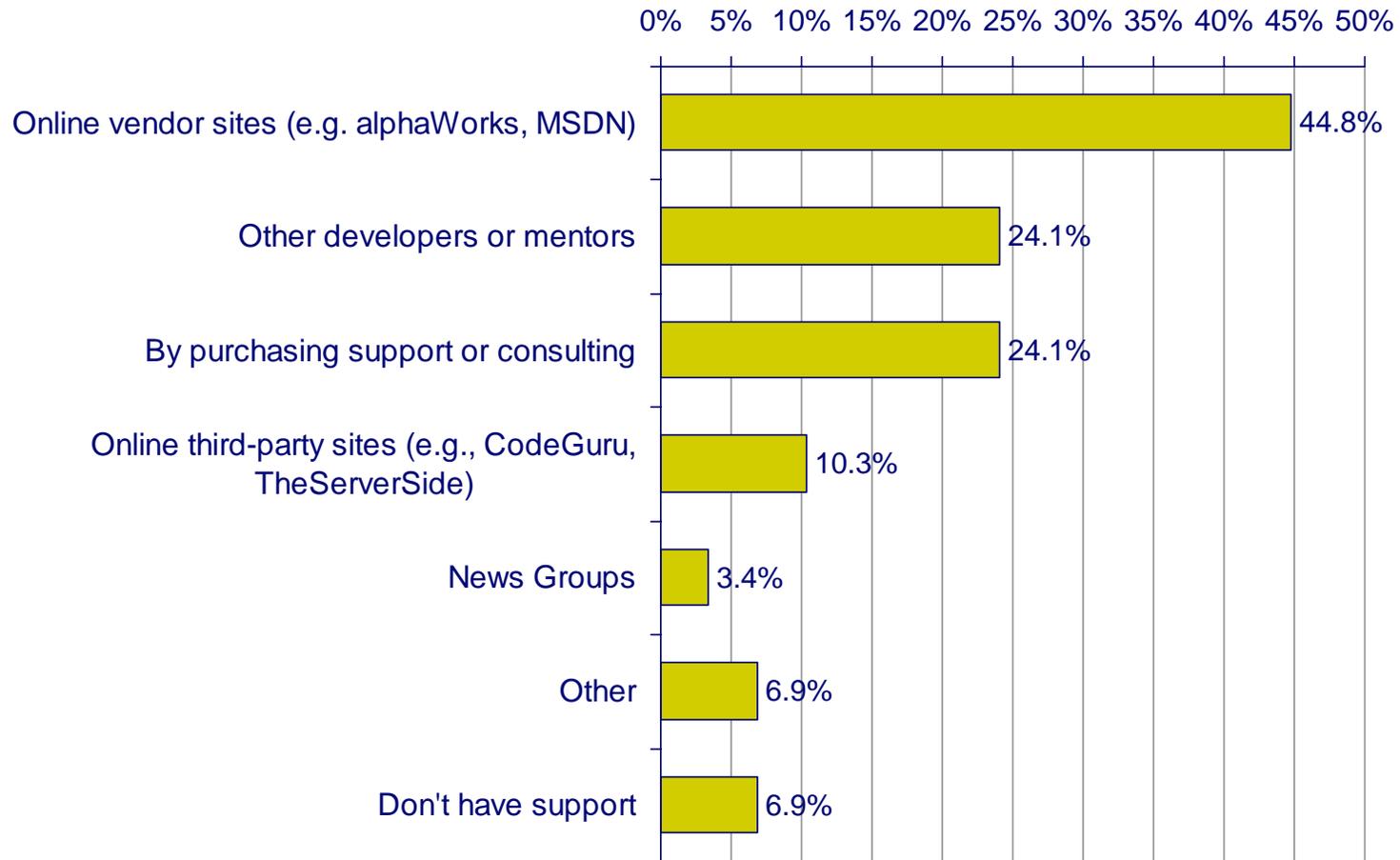


Percent of Respondents - Worldwide

Key Research Areas

Worldwide - Vendor Satisfaction

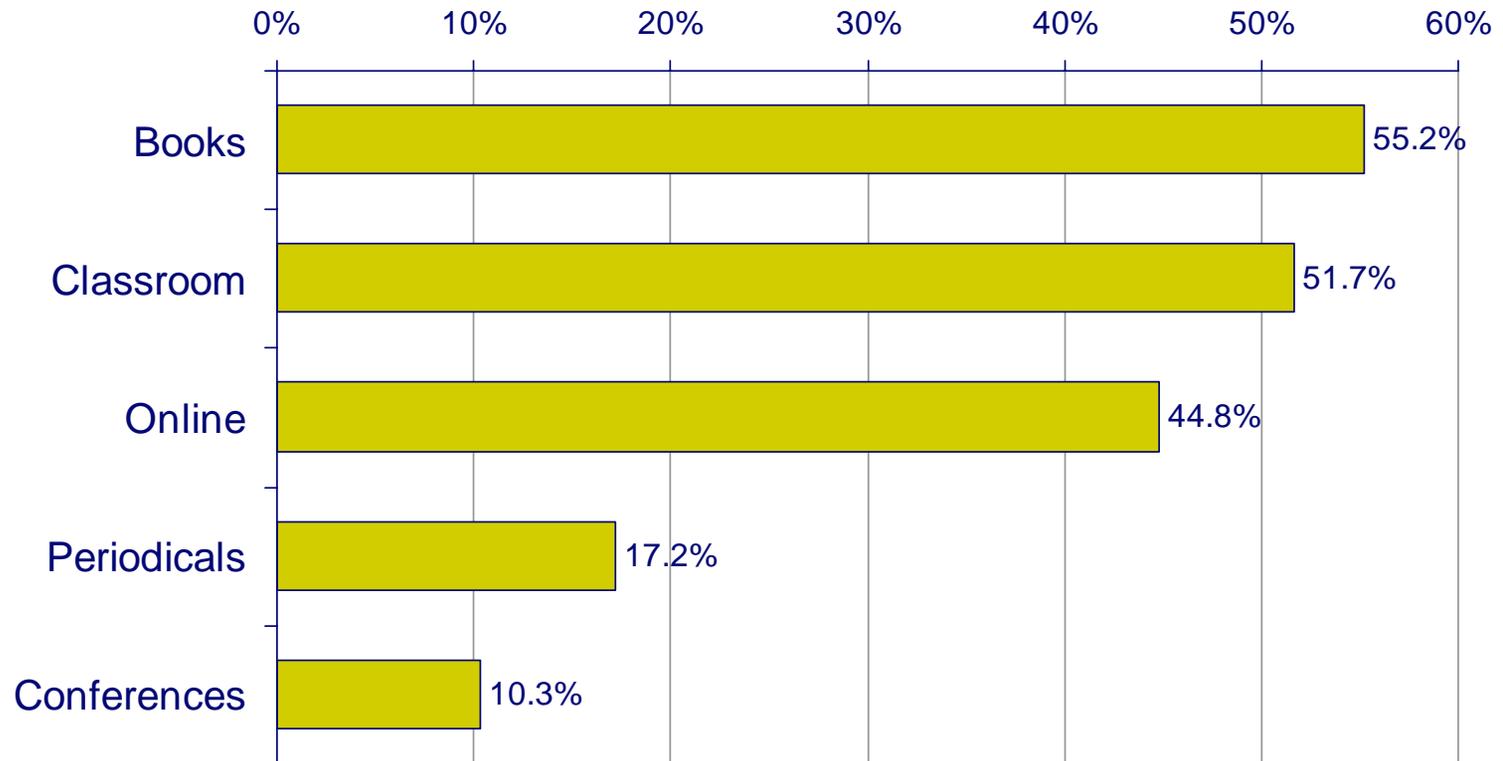
Q55-1. Which of the following sources do you use for support with problems you encounter while working with applications?



Key Research Areas

Worldwide - Vendor Satisfaction

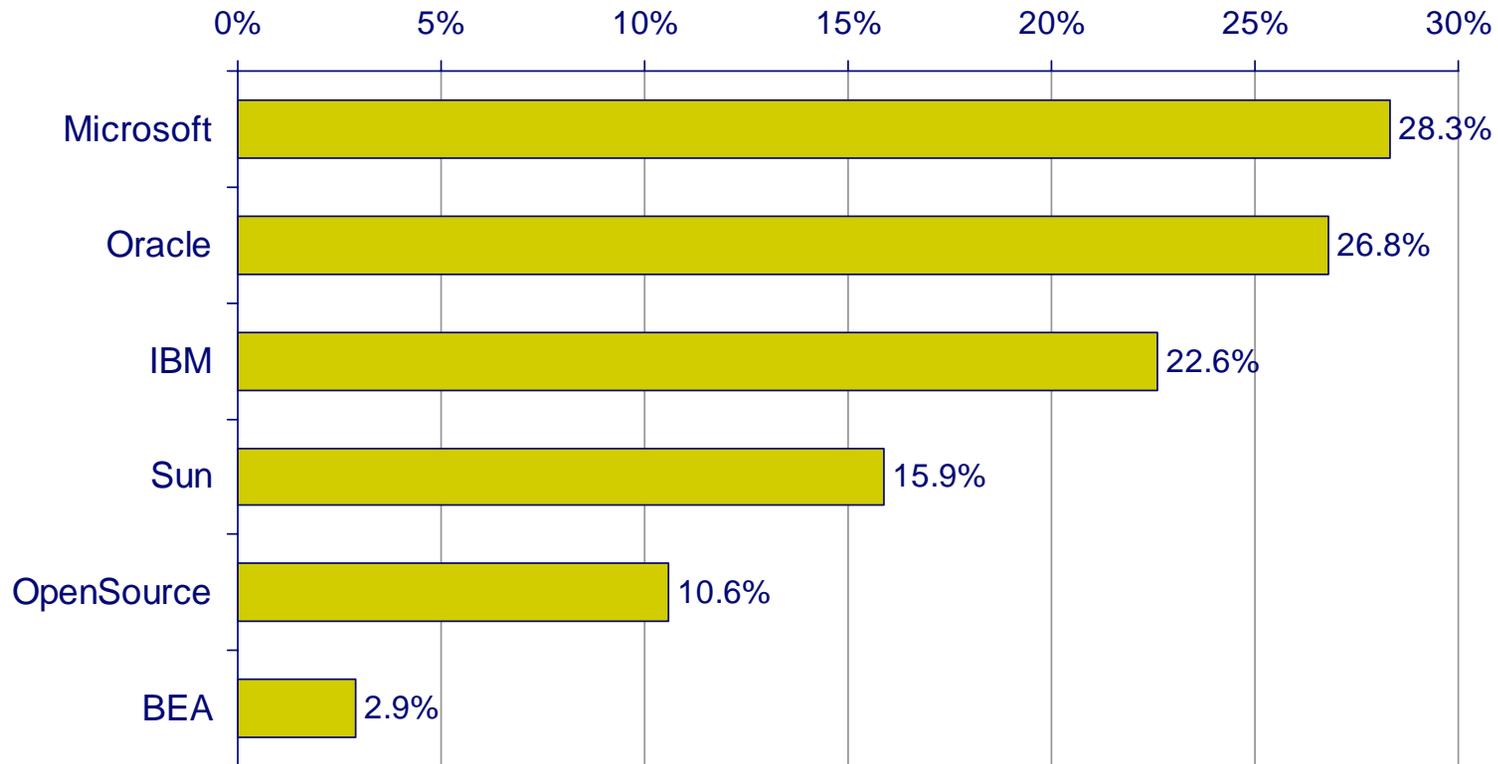
Q55-2. Which of the following sources do you use to get training on technology?



Percent of Respondents

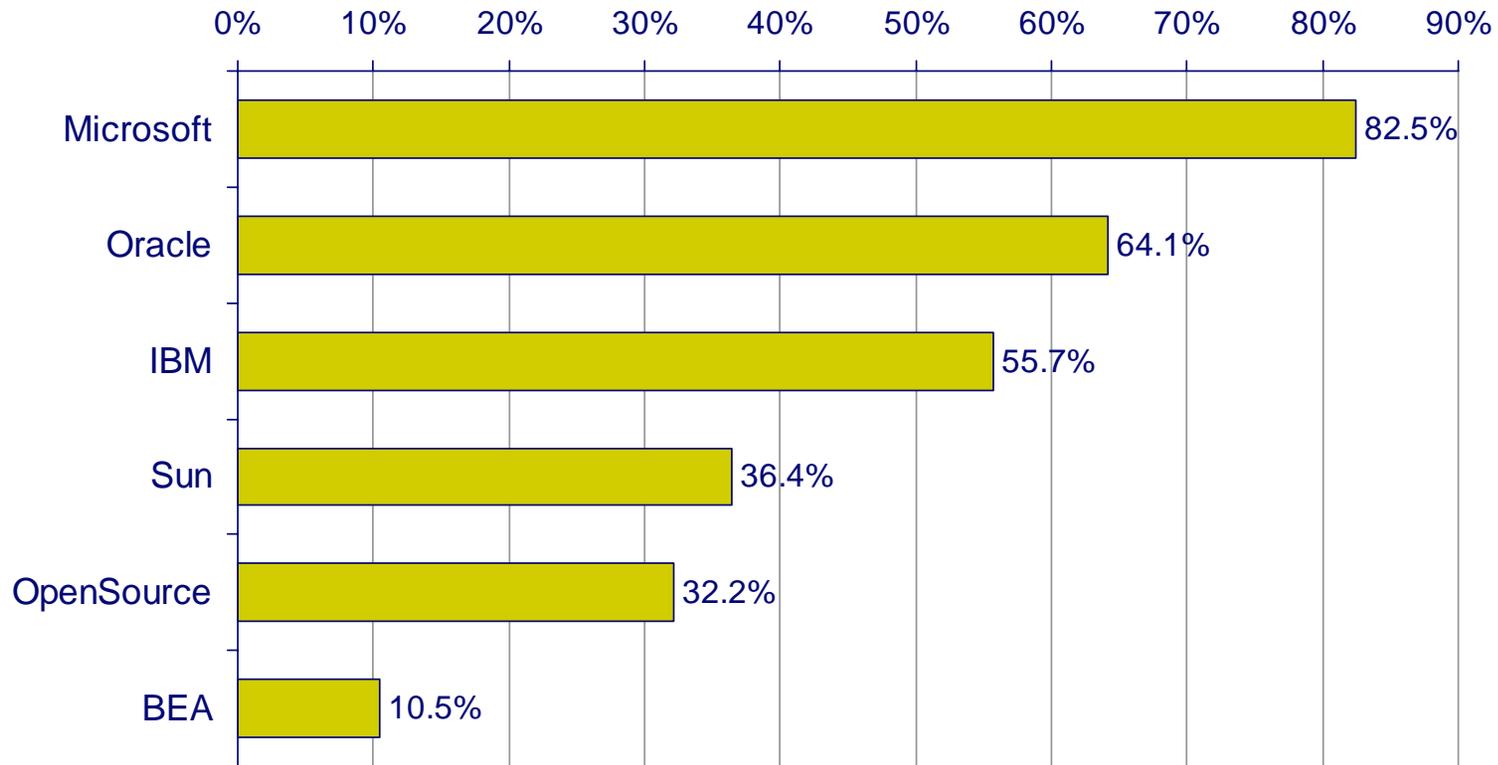
Key Research Areas Worldwide - Vendor Satisfaction

Q56-1. Are you **Very Satisfied** with...?



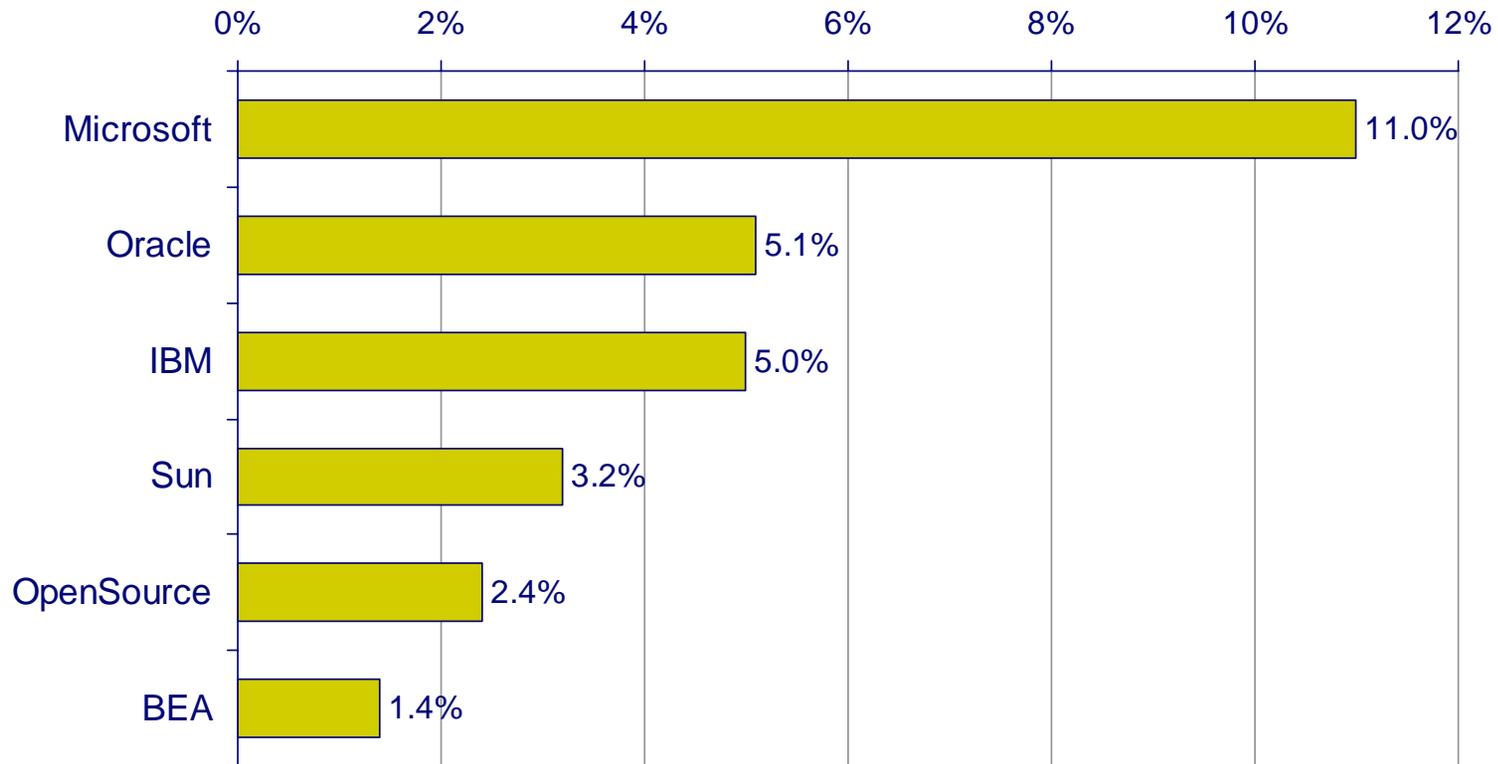
Key Research Areas Worldwide - Vendor Satisfaction

Q56-2. Are you **Very / Somewhat Satisfied** with...?



Key Research Areas Worldwide - Vendor Satisfaction

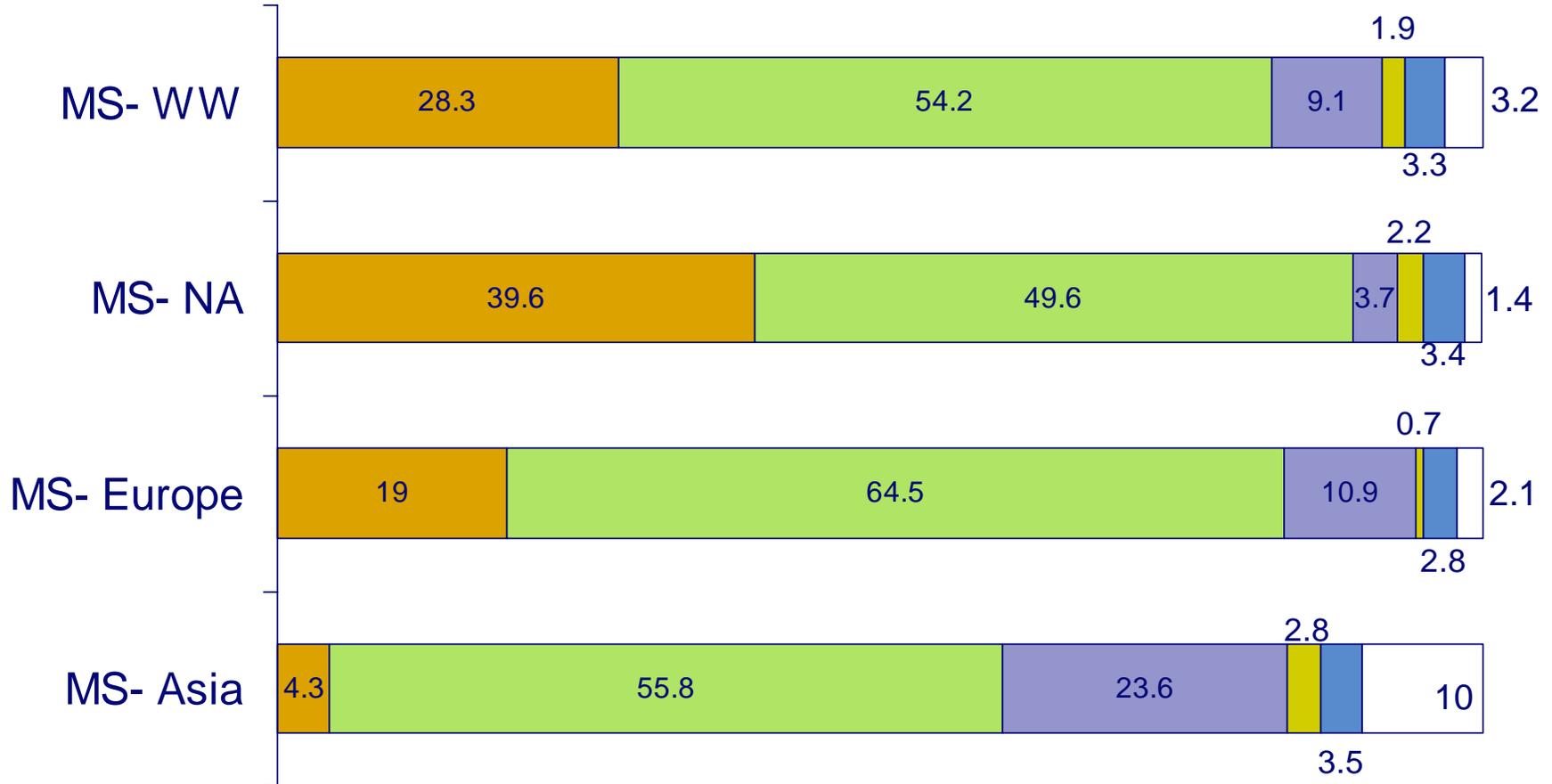
Q56-3. Are you **Very/Somewhat Dissatisfied** with...?



Key Research Areas Worldwide - Vendor Satisfaction

Q56-4. How are you in terms of Satisfaction with...?

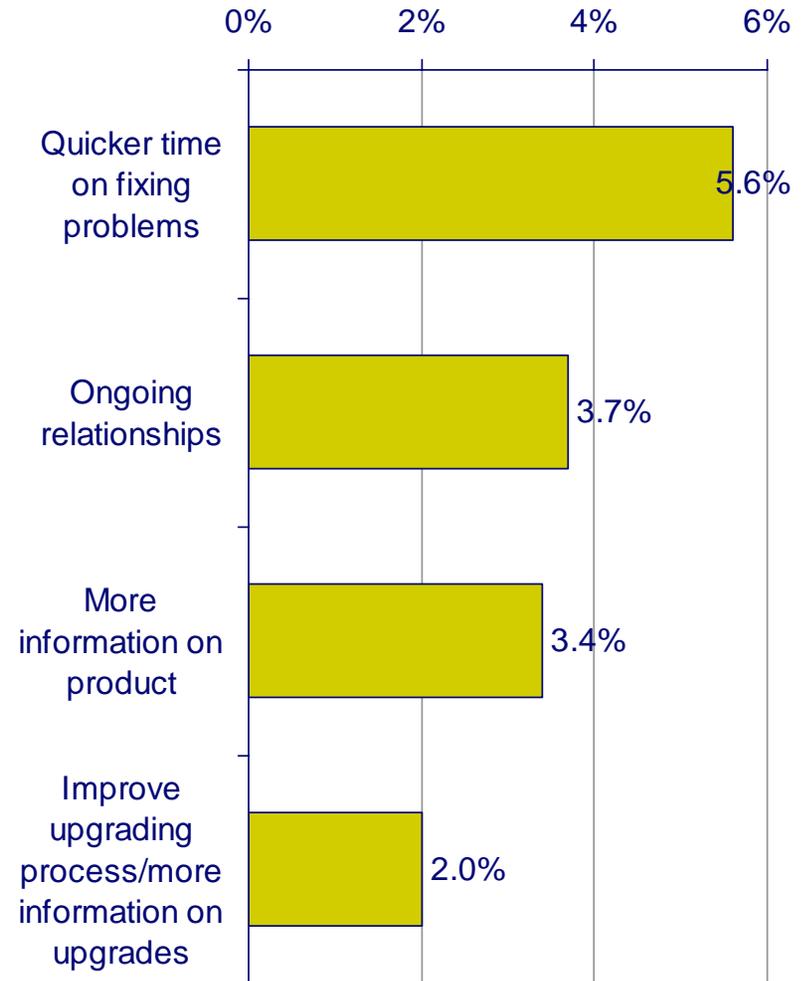
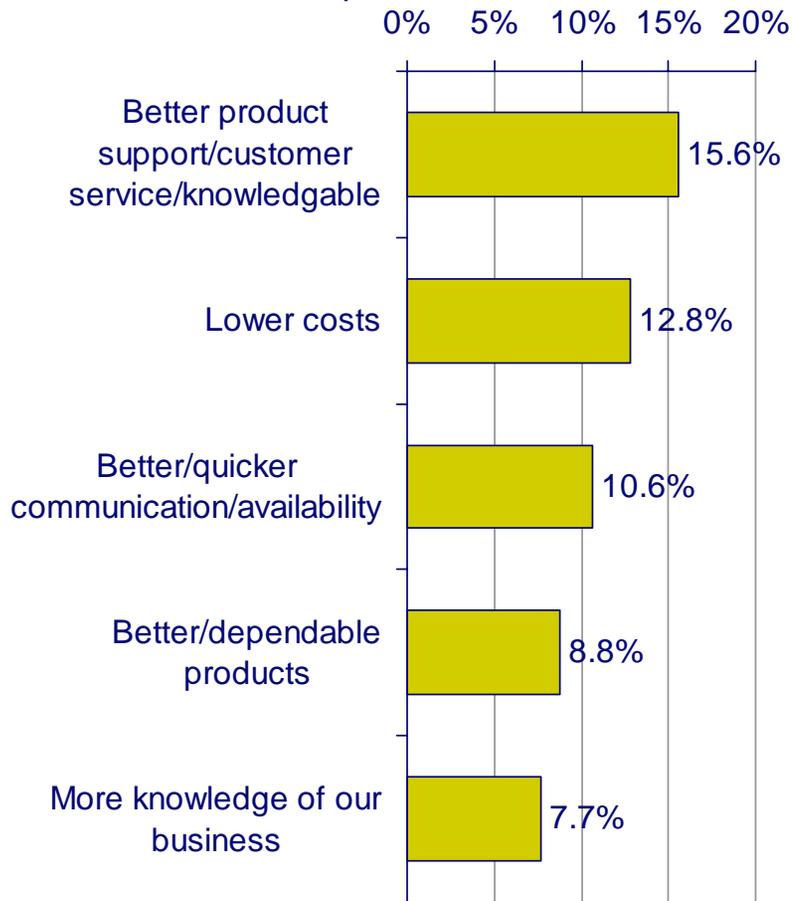
- Very Satisfied
- Somewhat Satisfied
- Somewhat Dissatisfied
- Very Dissatisfied
- Don't Use Vendor
- DK/REF



Key Research Areas

Worldwide - Vendor Satisfaction

Q57. What is the single most important thing your vendors could do to improve your relationship with them? - Top reasons



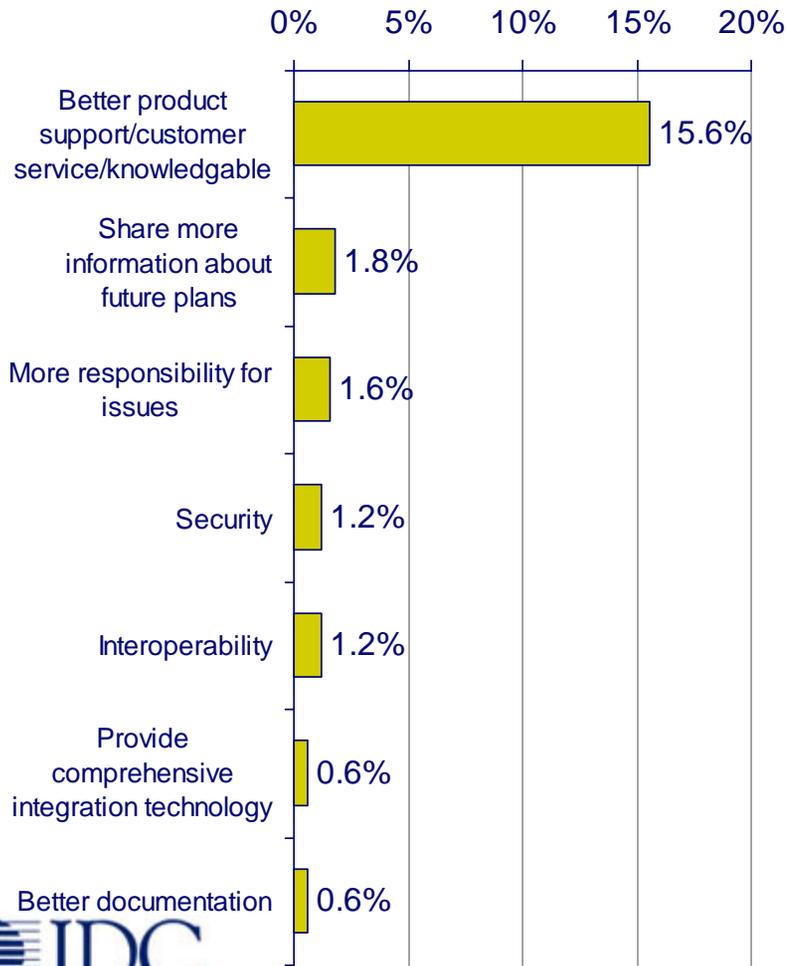
TOTAL UNWEIGHTED FREQ. 1,740

Source: IDC's Mission Critical Study, July 2005

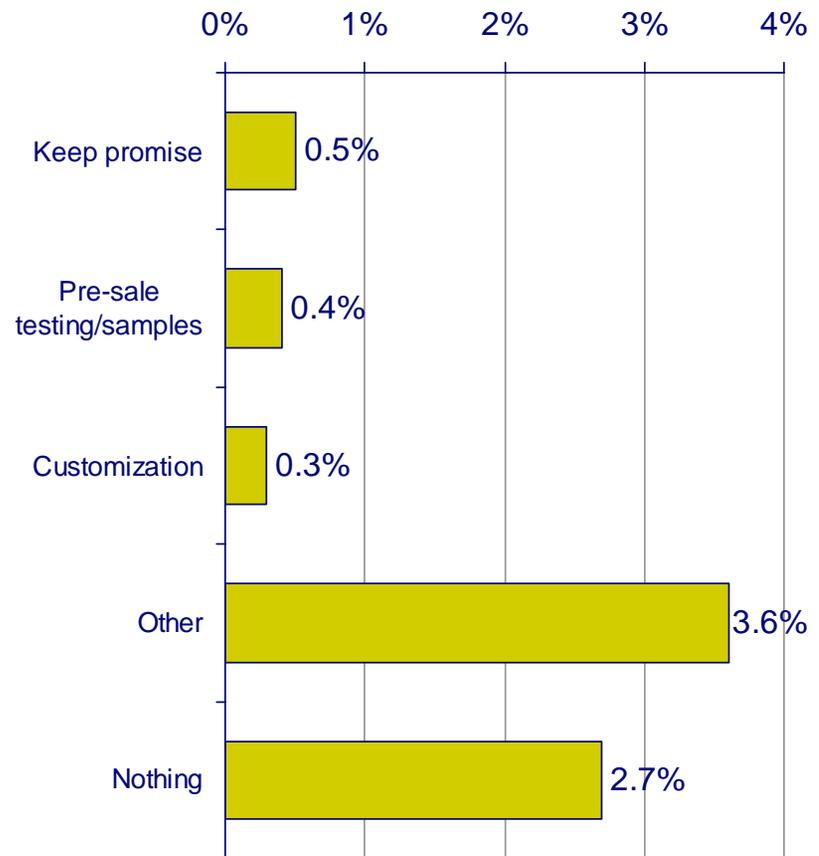
Key Research Areas

Worldwide - Vendor Satisfaction

Q57. What is the single most important thing your vendors could do to improve your relationship with them?



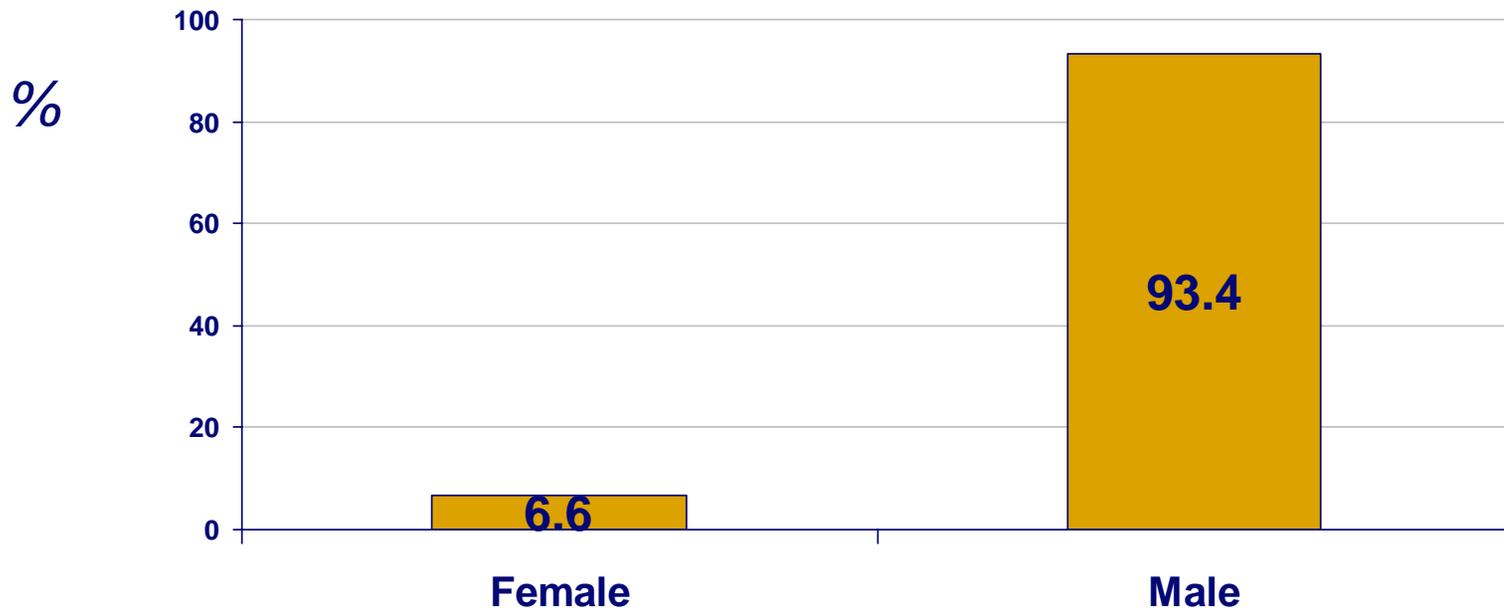
TOTAL UNWEIGHTED FREQ. 1,740



Source: IDC's Mission Critical Study, July 2005

Key Research Areas

Worldwide - Vendor Satisfaction



Company & Respondent Profiles

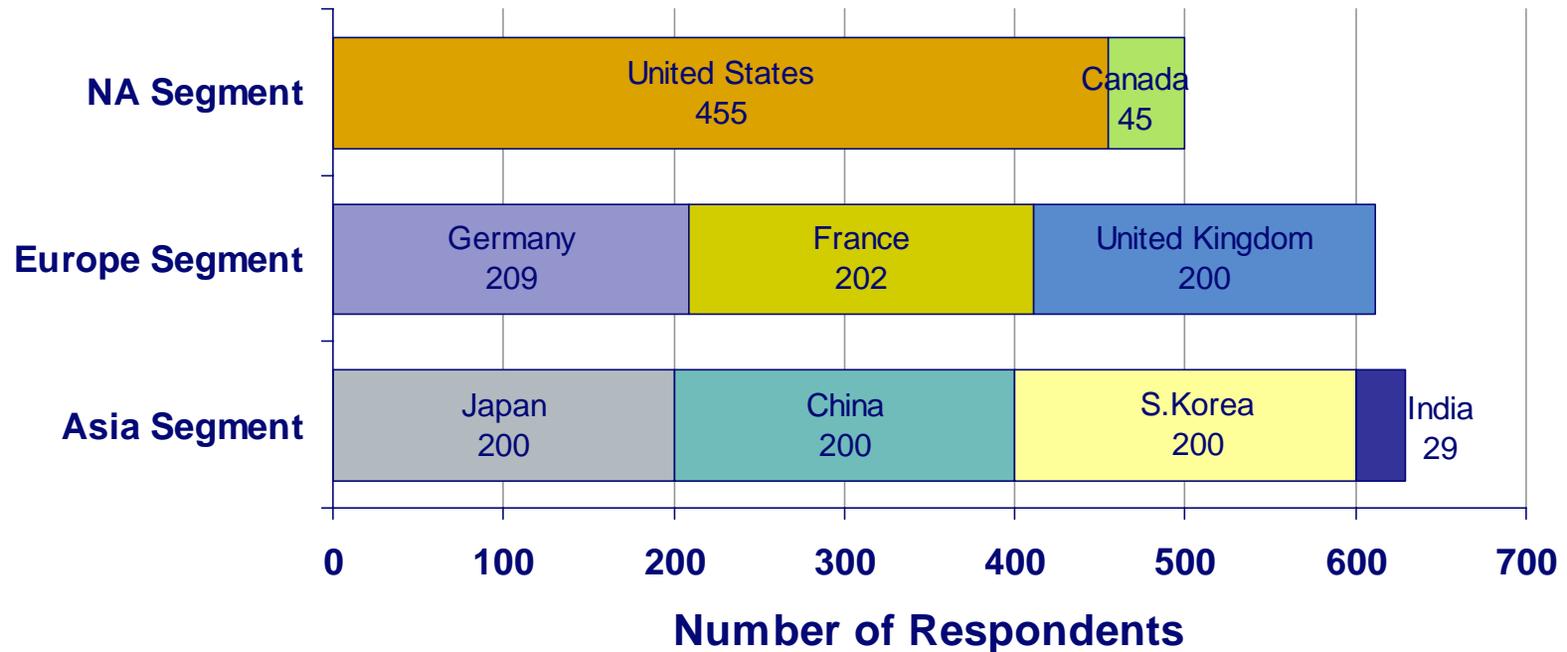
IT Screening Questions

- Country
- S1a: Total number of employees in company
- S1c: Company's vertical industry classification
- S3: Your primary role in company
- S4: Activities you are involved in within your company
- S6: What business unit do you work in

Respondent Profiles

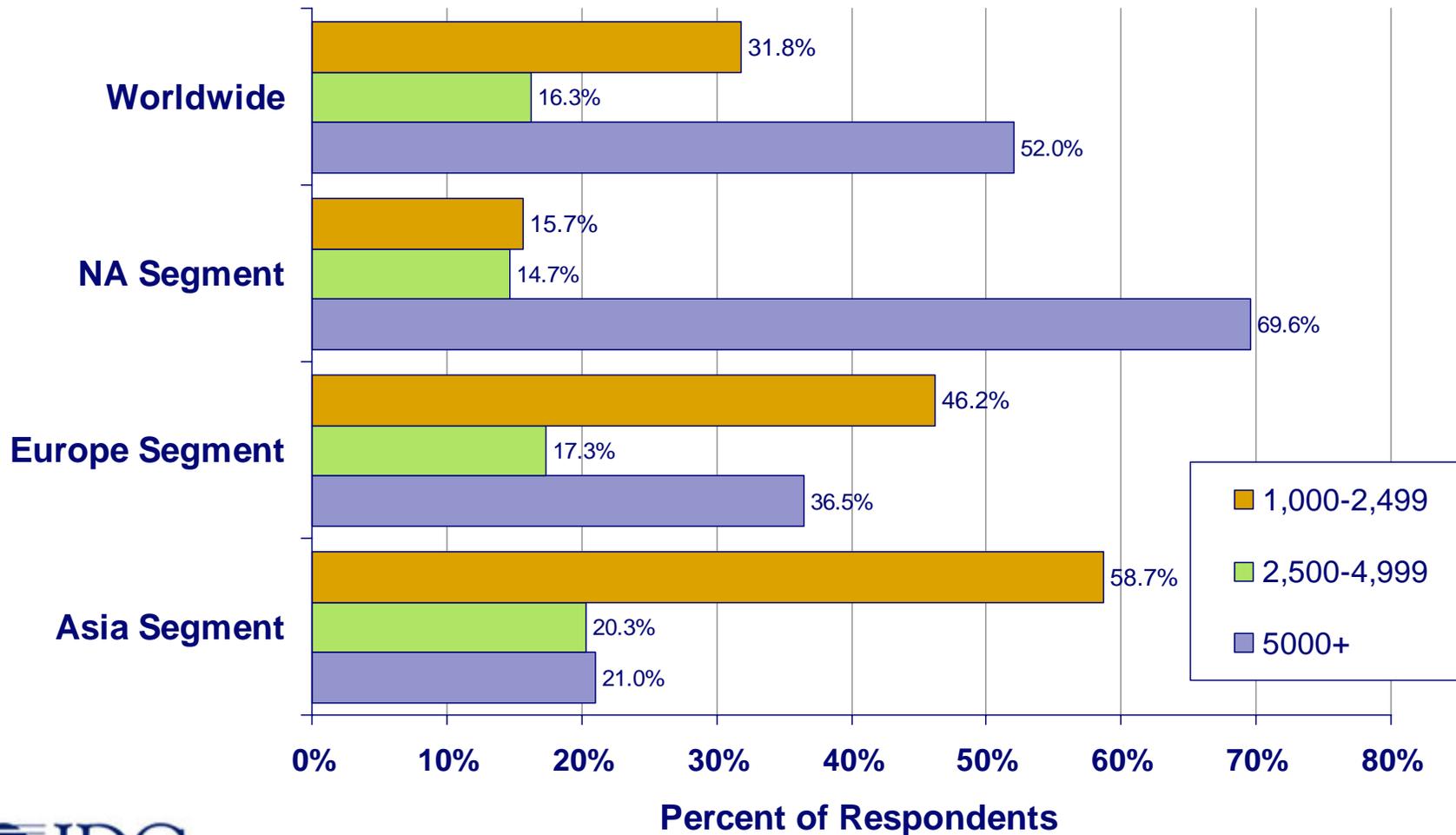
Regional and Country Segments

Number of observations by country
(Quota's in effect)



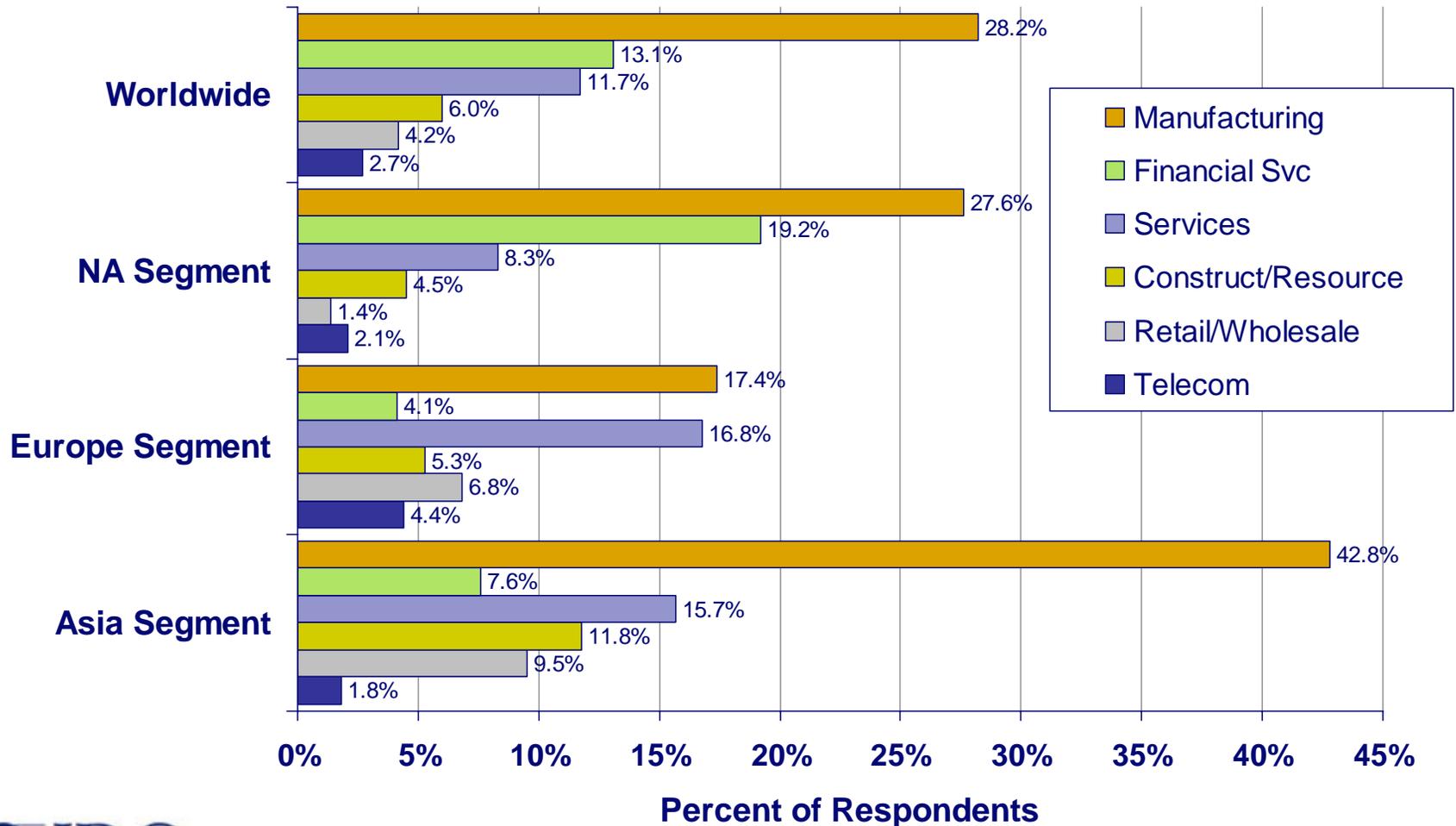
Total Number of Company Employees Worldwide and Regional Segments

S1a: What is the total number of employees in your company worldwide?
(Terminate if less than 1,000)



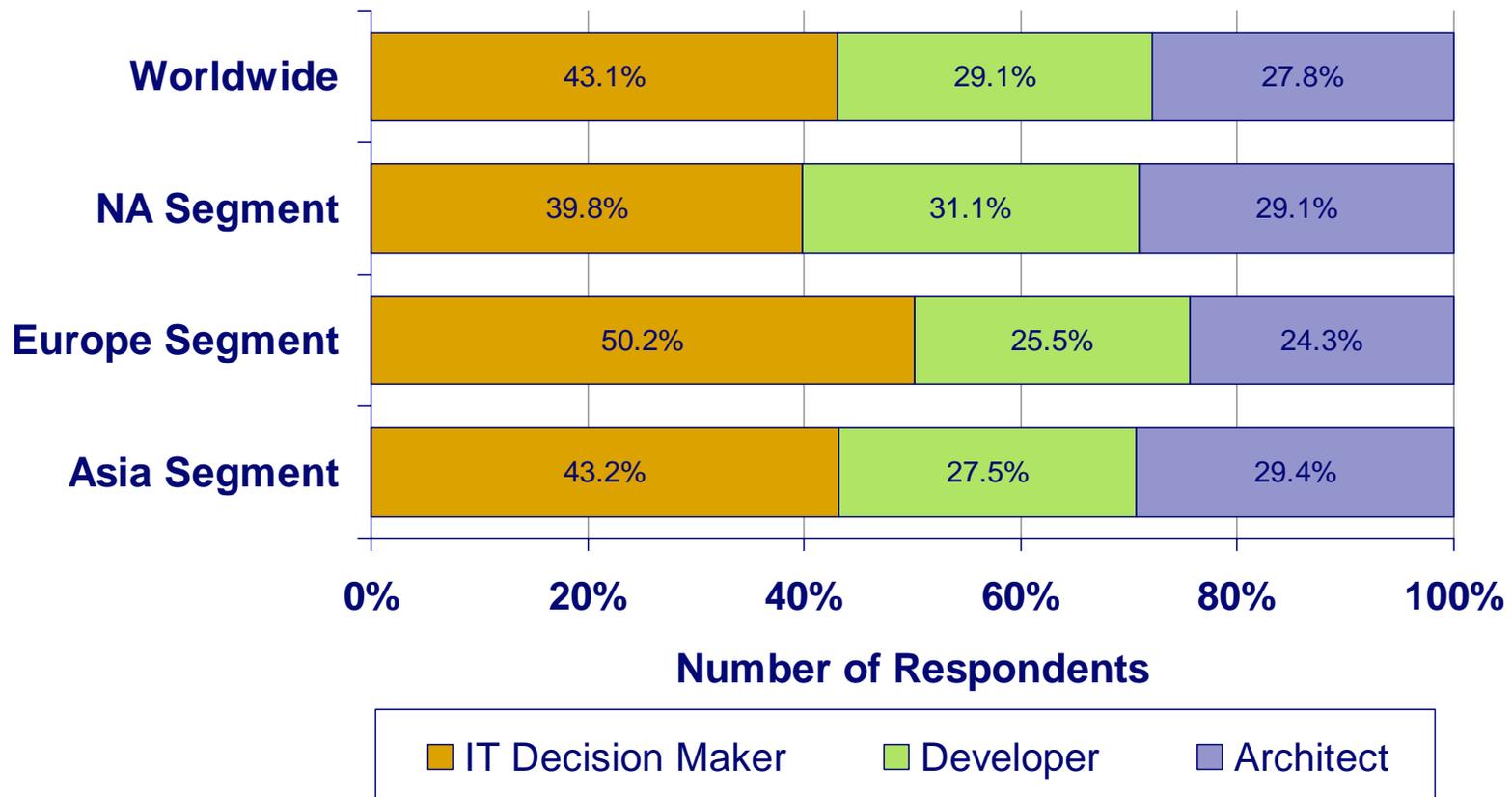
Primary Business Activity Worldwide and Regional Segments

S1c: What is your company's primary business activity or industry?



Primary Role in Company Worldwide and Regional Segments

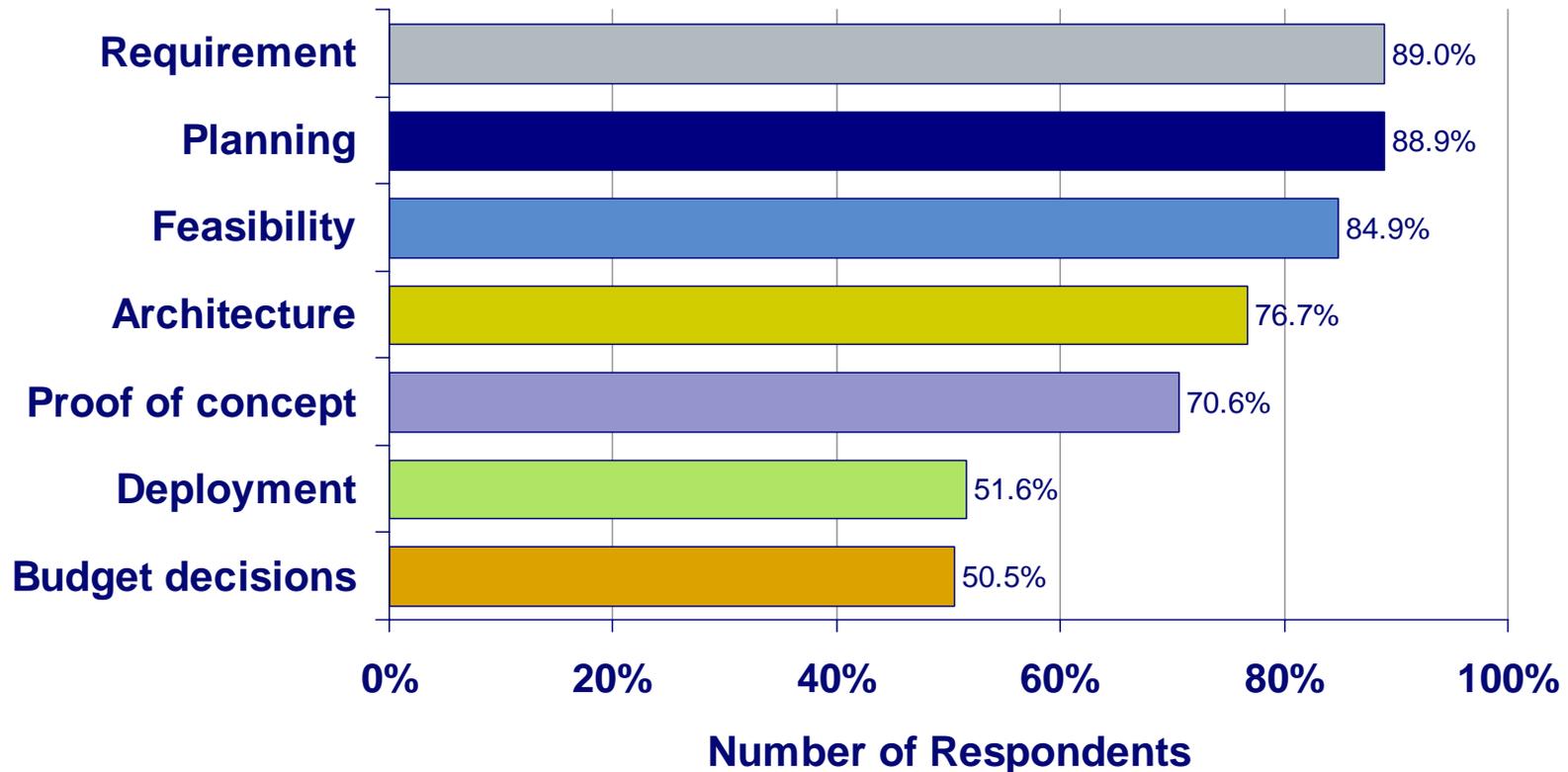
S3: Which of the following best describes your role at work?
(Single response only, quotas in effect)



Respondent Activities in Company Worldwide

S4: For projects involving application integration or new application development, are you involved in any of the following activities for your organization?

(Multiple responses required, "respondent type" quotas in effect, all respondents responded to 2 or more activities)

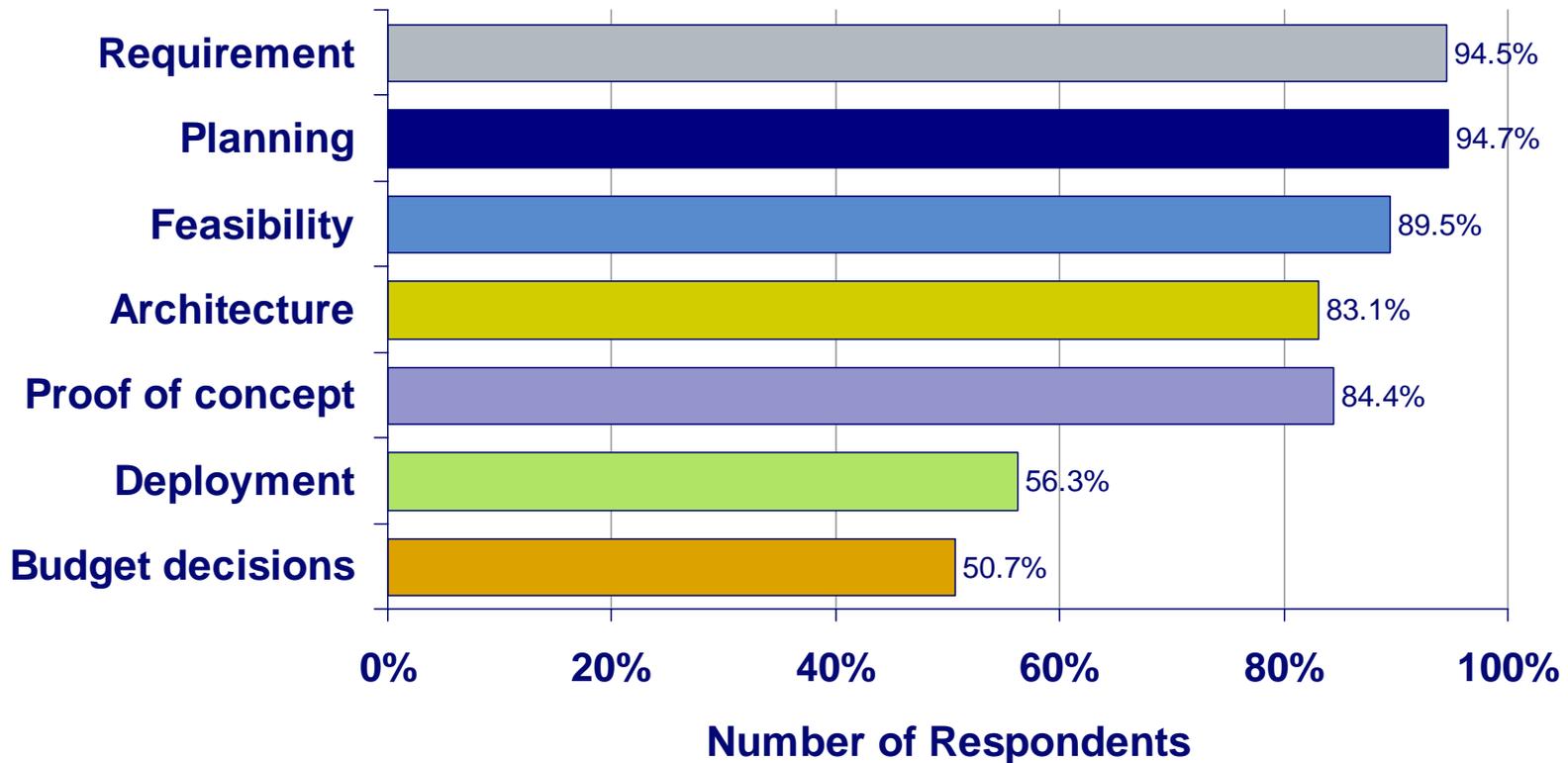


Respondent Activities in Company

NA Segment

S4: For projects involving application integration or new application development, are you involved in any of the following activities for your organization?

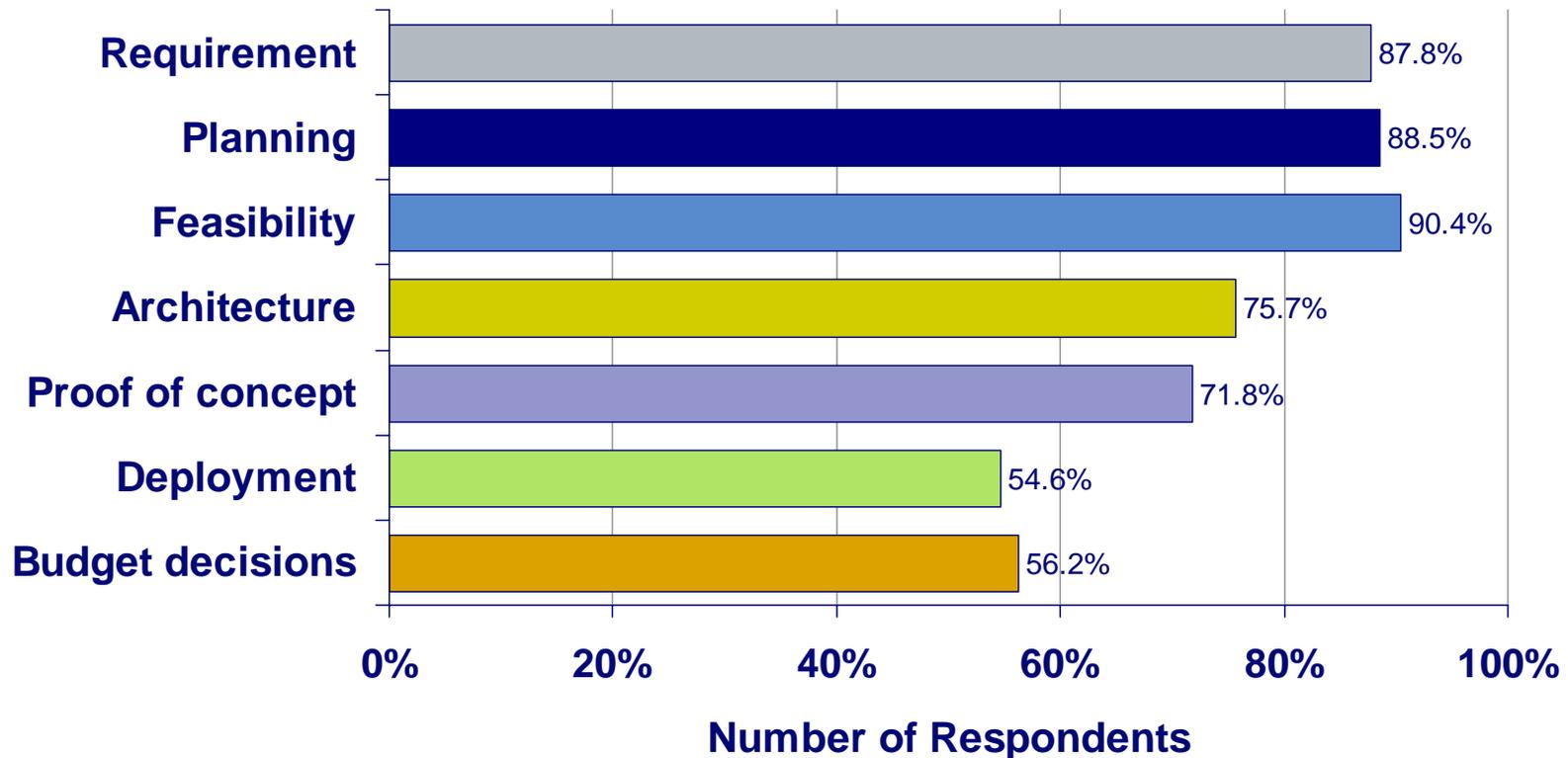
(Multiple responses required, "respondent type" quotas in effect, all respondents responded to 2 or more activities)



Respondent Activities in Company Europe Segment

S4: For projects involving application integration or new application development, are you involved in any of the following activities for your organization?

(Multiple responses required, "respondent type" quotas in effect, all respondents responded to 2 or more activities)

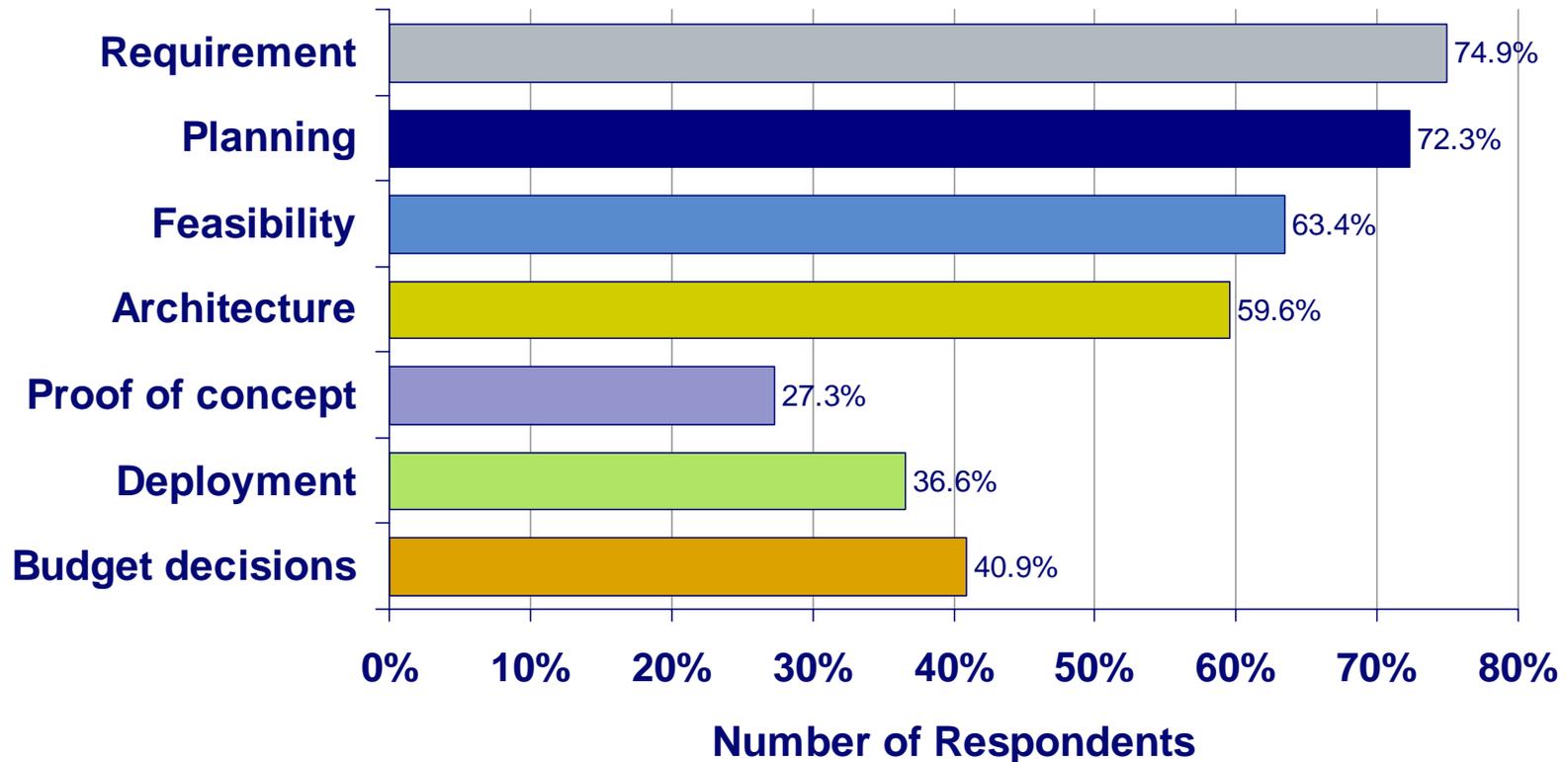


Respondent Activities in Company

Asia Segment

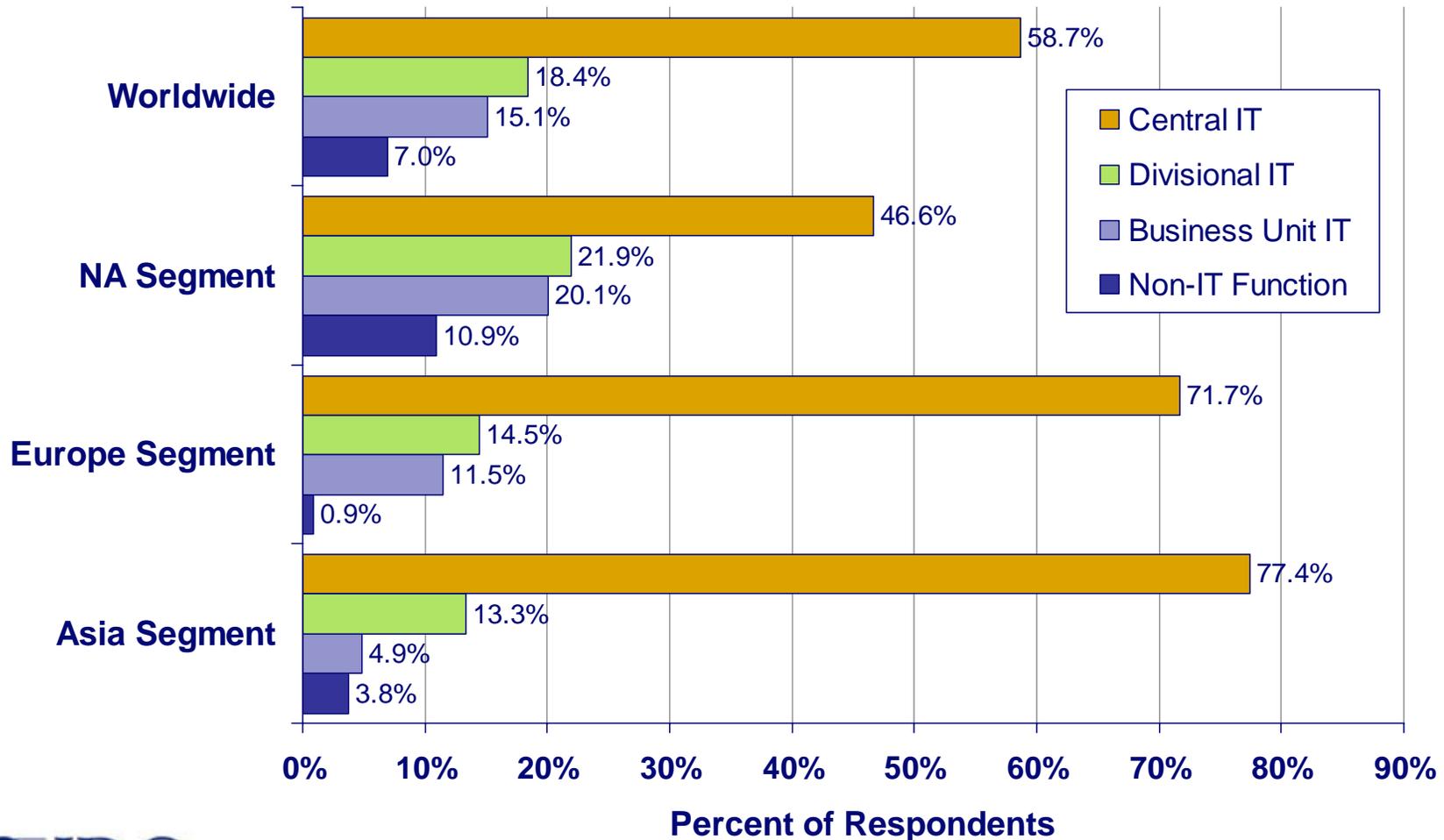
S4: For projects involving application integration or new application development, are you involved in any of the following activities for your organization?

(Multiple responses required, "respondent type" quotas in effect, all respondents responded to 2 or more activities)



Business Unit Respondent Works in... Worldwide and Regional Segments

S6: Do you work in...?



Stephen D. Hendrick
Group Vice President
Application Development & Deployment Research

2005 Mission Critical Survey

General Presentation

www.idc.com

