

Table of contents

Copyright	1
Table of contents	2
Table of figures	3
List of abbreviations	5
0 Management Summary	6
1 Introduction	10
1.1. Initial situation	10
1.2. Methodology	12
1.3. Sample statistics	14
1.4. Definitional basics	20
2 Linux & Open Source - CIO´s perspective	21
2.1 Linux-barriers and -drivers	21
2.2 Linux scenarios	26
2.3 Relevance of Linux in CIO´s IT-planning	31
2.4 Reason against the usage of Linux	35
2.5 Server-side Linux	37
2.6 Desktop-Linux	47
2.7 Proprietary & Open Source applications and solutions on Linux platforms	52
2.8 Service & Support for Linux and Open Source	66
3 Linux - Distributions	74
3.1 Penetration rate of Linux distributions	74
3.2 Competitor comparison	78
4 Linux/Open Source - Market forecasts	83
4.1 Installed Base of Linux	83
4.2 Market volume of Linux/Open Source for hardware, software and services	87
4.3 Investment trends	88
5 Buying and decision schemes	93
5.1 Relevance of Linux-magazines for Linux investment decisions	93
5.2 Relevance of other sources of information	96
5.3 Linux/Open Source decision-makers	98
6 Perspectives	100
7 Contact	102

Table of figures

Figure 1 - Methodology of the survey	13
Figure 2 - Industry sector	14
Figure 3 - Size of company by employees	15
Figure 4 - Size of company by revenues in 2004	16
Figure 5 - Job level of interviewed decision-makers	17
Figure 6 - Installed desktops & servers by industry	18
Figure 7 - Investment trends for desktops & servers by industry	19
Figure 8 - How CIOs think about the development of Linux as Server-OS by industry	27
Figure 9 - How CIOs think about the development of Linux as Server-OS by company size	29
Figure 10 - How CIOs think about the development of Linux as Desktop-OS by industry	30
Figure 11 - Linux` strategic relevance in CIO`s IT-planning	32
Figure 12 - Reason against the usage of Linux as Server-OS	36
Figure 13 - Linux penetration by company size	37
Figure 14 - Linux penetration by industry	40
Figure 15 - Percentage of Linux-server and Linux-workload by industry	44
Figure 16 - Rate of penetration of server-OS	46
Figure 17 - Rate of penetration of Linux as desktop-OS by industry	47
Figure 18 - Percentage of Linux-desktops installed	50
Figure 19 - Applications deployed on Linux-server-platforms [1] / [2]	54
Figure 20 - Open Source Solutions deployed (server-side) [1] / [2]	58
Figure 21 - Linux-desktops as platform for applications	60
Figure 22 - Percentage of Linux-desktops with specified applications	61
Figure 23 - Selection criteria for Linux-ISV	63
Figure 24 - Brand awareness and estimated performance of Linux-ISVs	65
Figure 25 - Applied Linux/Open Source services during the planning proces	68
Figure 26 - Applied Linux/Open Source services during the implementation process	69
Figure 27 - Applied Linux/Open Source services during deployment	70
Figure 28 - Rating of Top-3 Service-Provider for Linux & Open Source	72
Figure 29 - Sources of information in case of a Linux/Open Source specific problem/challenge	73
Figure 30 - Deployed distributions on server (across all industries)	75
Figure 31 - Deployed distributions on desktop (across all industries)	77
Figure 32 - Competitor comparison (by industry)	80
Figure 33 - Competitor comparison (by company size)	82
Figure 34 - Installed base of Linux-server	84
Figure 35 - Installed base of Linux-desktops	86

Figure 36 - The German Market for Linux & Open Source	87
Figure 37 - Linux/Open Source investment trends by industry	90
Figure 38 - Linux/Open Source investment trends by company size	91
Figure 39 - Linux/Open Source investment trends by spending volume	92
Figure 40 - Use of Linux magazines / Top-3 Magazines	94
Figure 41 - Linux magazines by relevance for Linux investment decisions	95
Figure 42 - Source of information by relevance	97
Figure 43 - Linux/Open Source decision makers	99