

2nd Annual Eclipse Global Enterprise Survey Research Findings

(Public Version)

Evans Data Corporation

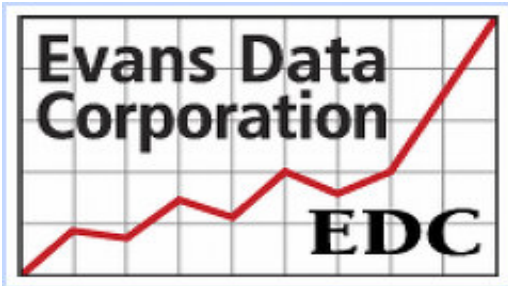
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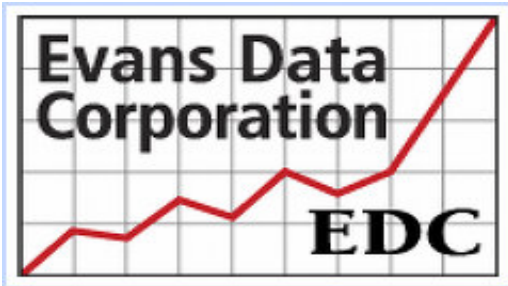
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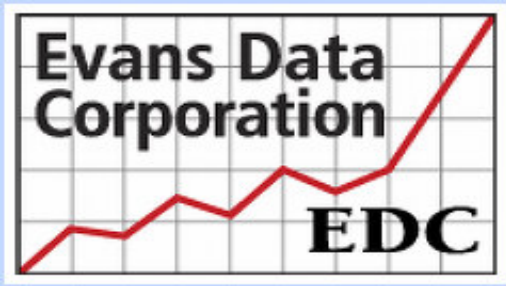
Background and Overview

- The 2nd Annual Eclipse Global Enterprise Report is a custom primary research survey addressing attitudes, awareness, perceptions and concerns of developers regarding Eclipse and Eclipse-related products
- The report includes data on development platforms and environments, plug-ins as well as product purchase influences
- This report draws from a sample of 384 respondents who are either currently working with Eclipse or are familiar with this IDE
- All work in companies with greater than 250 employees
- The global distribution of respondents were 55% North America, 23% EMEA, 18% APAC and 3% Latin America



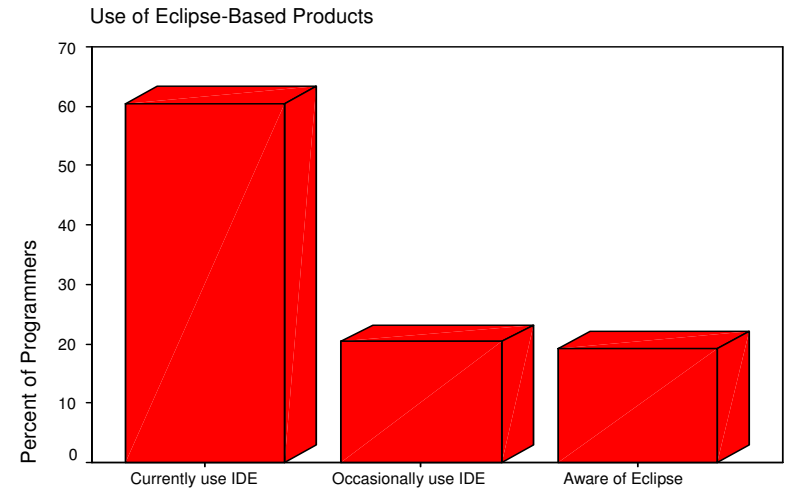
Respondents

- The findings focus exclusively on organizations with 250 or more employees:
 - 23% from companies >250-1000
 - 77% from companies >1,000
 - 37% from companies >25,000
- All respondents use/are aware of Eclipse-based products:
 - 60% as primary IDE
 - 20% occasionally
 - 20% are aware of it
- Respondents are in various roles including:
 - 40% are VP, CTO, CIO, MIS , and IT and other management
 - 29% are programmers
- Eclipse usage and awareness is widely dispersed across the industries
- Consistent with last year's results, the larger the company the more likely Eclipse is to be the primary IDE



Use of Eclipse-based Products

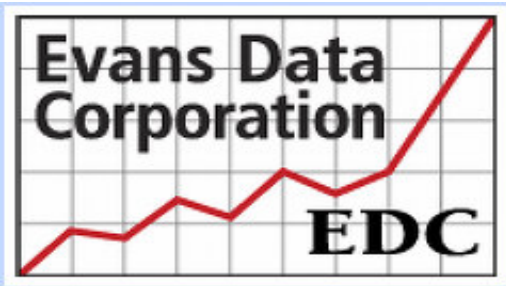
- The responses to this primary screening question determine respondents' survey eligibility
- This year we find that six in ten respondents use Eclipse as their primary IDE, nearly double from last year's 32% - indicating a transition from occasional and aware



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Which of the following best describes your knowledge / use of Eclipse or Eclipse-based products (such as IBM Rational Application Developer, MyEclipse, WindowBuilder, Compuware OptimalJ or others)?	Valid Percent 2005	Valid Percent 2006
Currently use as primary IDE	32.5	60.4
Currently use occasionally as an IDE	19.6	20.3
Aware of Eclipse or Eclipse-based products	47.9	19.3
Total	100	100

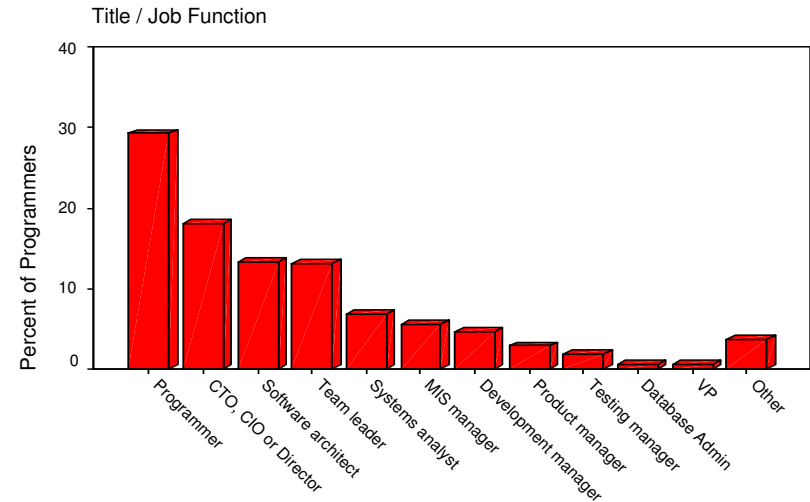
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Job Title/Role (Use of Eclipse-based Products)

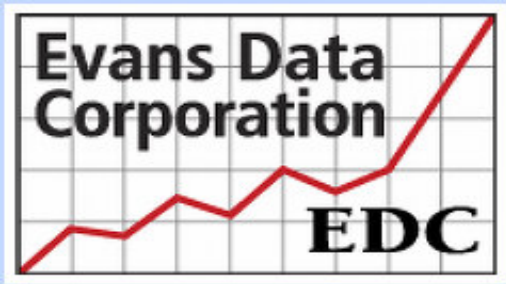
Note: the answer options to this question are more detailed this year, revealing more developer and management roles

- 42% is the combined total of the various management roles
- The title of programmer/software engineer comprises nearly three in ten respondents (29%)



Which best describes your title or job function?	Valid Percent 2005	Which best describes your title or job function?	Valid Percent 2006
Programmer/software developer	42.6	Programmer / software engineer	29.2
Team leader/project manager	27.5	CTO, CIO or Director	18.0
Development manager or director	8.6	Software architect	13.3
Chief architect or CTO	8.1	Project lead / team leader	13.1
MIS manager or director	4.2	Systems analyst	6.8
Executive management	2.5	IT, MIS or Other Management	5.5
Testing Manager	1.2	Departmental Development manager	4.7
Line of business manager	0.7	Product manager	2.9
Other	4.6	Software Tester/Testing Manager	1.8
Total	100.0	Database Administrator	0.5
		VP	0.5
		Other	3.7
		Total	100.0

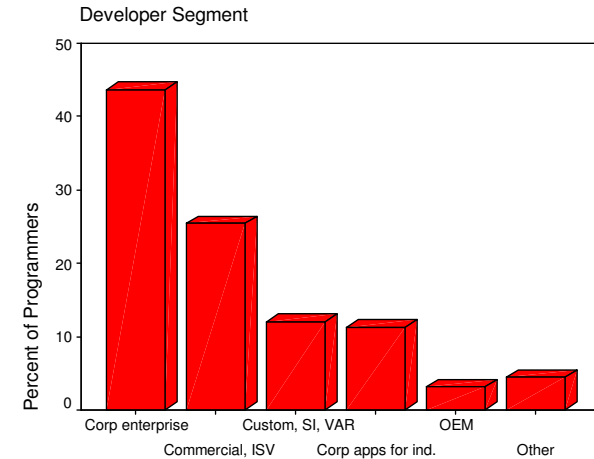
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Developer Segment

(Use of Eclipse-based Products)

- The largest group of respondents (over four in ten) remain most involved with corporate enterprise applications for use inside their companies
- The next largest group remains and develops commercial applications for sale outside their organization, i.e., ISVs, followed by those who write applications for individuals, small workgroups or departments



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Which of the following best describes the type of applications you work on MOST OFTEN?	Valid Percent 2005	Valid Percent 2006
Corporate-wide enterprise applications for use inside your company	41.4	43.7
Commercial applications for sale to people outside your company (ISV)	18.5	25.4
Applications for individuals, small workgroups, or department	14.6	11.3
Custom applications of any kind for clients outside your company (SI, VAR)	13.0	12.0
Applications or utilities to support specific devices your company makes or sells (OEM)	6.0	3.1
Open source software	2.3	*
Other	4.2	4.5
Total	100.0	100.0

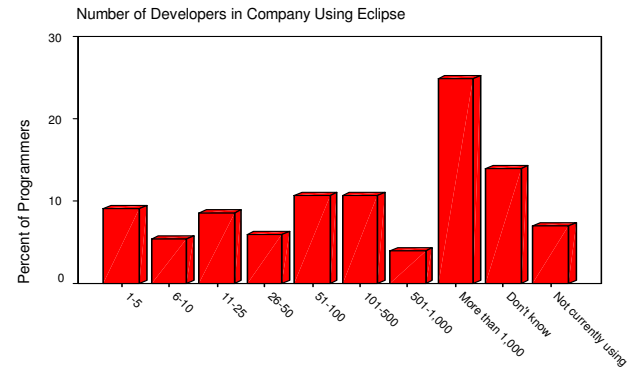
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Number of Developers Using Eclipse in Company

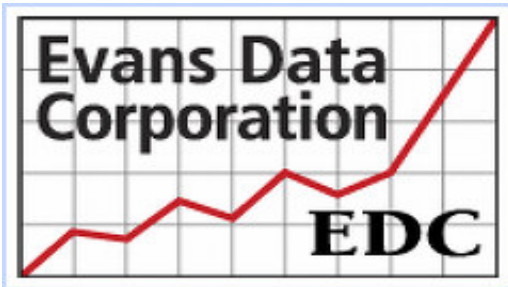
(Use of Eclipse-based Products)

- The category of 1000 develops represents the largest group of users (25%)
- This is not surprising, considering the fact that 37% of respondents work in enterprises with 25,000 or more employees



If Eclipse IDE or Eclipse-based products are being used in your company, about how many developers use them?	Valid Percent 2005	Valid Percent 2006
1-5	11.3	9.1
6-10	7.6	5.3
11-25	8.2	8.6
26-50	7.5	5.9
51-100	7.0	10.7
101-500	9.3	10.7
501-1,000	2.8	4.0
More than 1,000	4.0	24.9
Don't know	20.1	13.9
Not currently using Eclipse or Eclipse-based products	22.2	7.0
Total	100	100

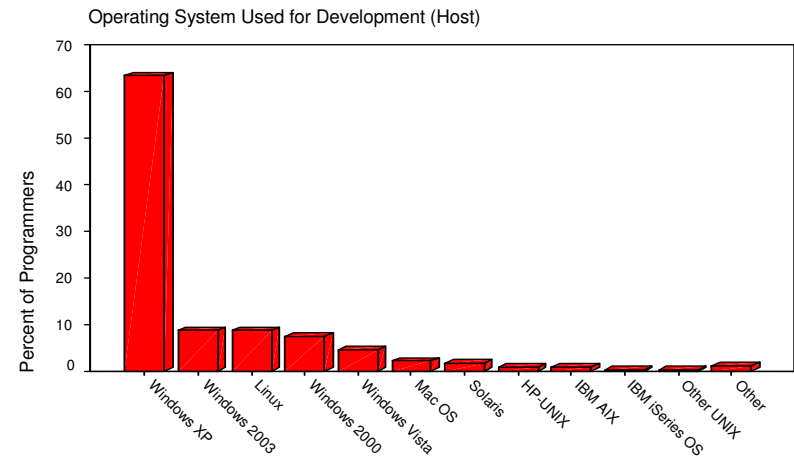
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Development (Host) Operating System

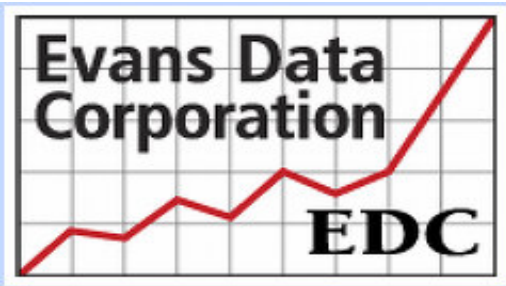
(Eclipse Environment)

- Windows XP continues to be the preferred host or development operating system (60%)
- The overall Windows family remains yr to yr about even (80%)
- Linux use has remained flat 8%, up slightly since last year (7%)



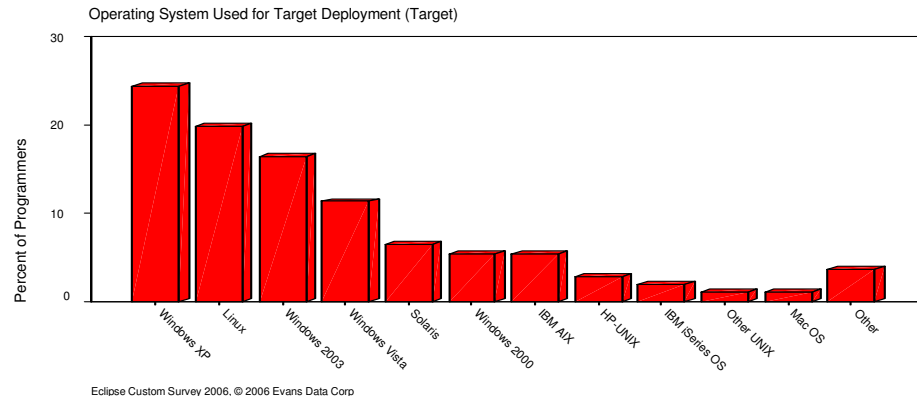
When using Eclipse or Eclipse-based products, which operating system do you run on the computer you use MOST to-Program / Development?	Valid Percent 2005	Valid Percent 2006
Windows 2003	5.0	8.8
Windows XP	58.4	63.3
Windows 2000	20.7	7.4
Windows Vista	*	4.7
Windows Other	0.5	*
Linux	*	8.8
Redhat Linux	4.2	*
SuSe Linux	1.9	*
Other Linux	1.1	*
Solaris	2.1	1.6
IBM AIX	1.9	0.8
IBM iSeries OS	*	0.3
Other UNIX	0.8	0.3
HP-UNIX	0.5	0.8
Mac OS	1.6	2.2
Other	1.3	1.1
Total	100.0	100.0

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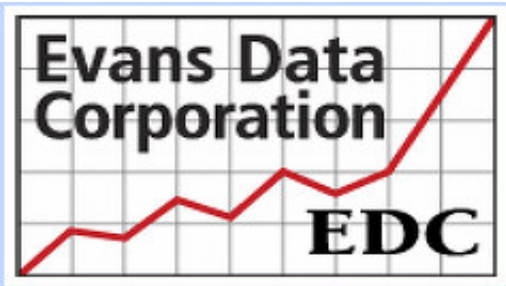
Deployment Operating System (Eclipse Environment)

- Windows XP remains the primary operating system
- This year, Linux moves to second place with 20%, up from 15% last year and reinforces Eclipse users' preference for Open Source and platform independence



When using Eclipse or Eclipse-based products, which operating system do you run on the computer you use MOST to - Deploy / Target Applications for	Valid Percent 2005	Valid Percent 2006
Windows XP	25.5	24.4
Windows 2000	15.4	5.4
Windows 2003	11.0	*
Windows 2003	1.9	16.4
Windows Vista	*	11.3
Solaris	11.8	6.5
IBM AIX	6.3	5.4
IBM iSeries OS	*	2.0
HP-UNIX	2.5	2.8
Other UNIX	1.4	1.1
Linux	*	19.8
Redhat Linux	8.8	*
Other Linux	3.0	*
SuSe Linux	2.7	*
Mac OS	*	1.1
Other	9.6	3.7
Total	100.0	100.0

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Type of Software Eclipse Is Used To Develop - Trend

Eclipse: Plug-in Adoption and Use

- Almost 2/3 are developing server-centric applications, a 20% increase over last year
- This year, the average number of different types of applications was 2.4, whereas last year the average was 1.6
- Although all categories showed increases, development for RCP, embedded systems and plug-ins for Eclipse showed the largest gains.

What type of software are your Eclipse-based products being used to develop?	Percent of Cases 2005	Percent of Cases 2006
Server-centric applications (J2EE applications, database apps, ERP, CRM, etc.)	54.9	65.1
Desktop client applications	26.6	44.1
Thin-client applications	24.5	33.5
Plug-ins for Eclipse	9.1	23.2
Embedded software	9.1	22.7
Rich client applications using Eclipse RCP	9.3	22.7
Mobile client applications	*	16.8
Other	4.7	5.4
Not currently using Eclipse/Eclipse-based products	31.5	8.6
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Total Responses	169.9	242.2

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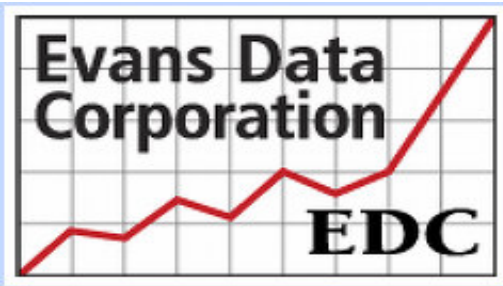
Usage Expectations for Eclipse Rich Client Platform

Eclipse: Plug-in Adoption and Use

- This question is new this year
- 2/3 expect that they will be using the RCP in the next 6 months, of those nearly half expect it to increase

How do you expect your use of the Eclipse Rich Client Platform to change over the next 6-24 months?	6 Months	12 Months	18 Months	24 Months
Increase	44.2	44.5	37.8	37.5
Stay the same	23.6	26.0	22.2	19.5
Decrease	2.3	1.4	3.3	2.1
Will not use	13.1	8.7	8.7	7.2
Don't know	16.8	19.4	27.9	33.6

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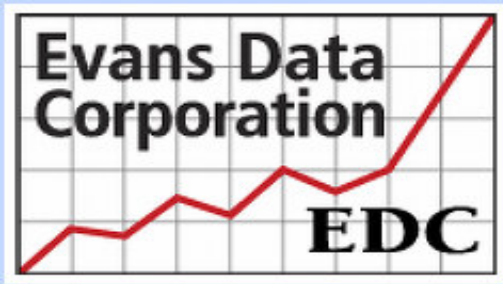


Current and Planned Eclipse Projects

(Eclipse: Plug-in Adoption and Use)

- This question is new this year
- On average developers are working on or planning to work on 5.3 projects over the next 12 months.
- 30% use or plan to use RCP

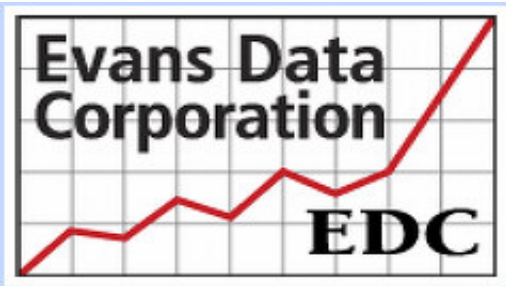
What Eclipse projects do you use or plan to use in the next 12 months?	Count	Percent of Responses	Percent of Cases
Java Development Tools (JDT)	192	10.8	57.5
C/C++ IDE (CDT)	158	8.9	47.3
Eclipse Modeling Framework (EMF)	122	6.9	36.5
Eclipse Rich Client Platform (RCP)	99	5.6	29.6
Web Tools Project (WTP)	97	5.5	2.9
Data Tools Platform (DTP)	81	4.6	24.3
UML2	79	4.4	23.7
Business Intelligence and Reporting Tools (BIRT)	74	4.2	22.2
Graphical Editor Framework (GEF)	72	4	21.6
Eclipse Process Framework (EPF)	71	4	21.3
Visual Editor (VE)	68	3.8	20.4
Eclipse Communication Framework (ECF)	67	3.8	20.1
Test & Performance Tools Platform (TPTP)	67	3.8	20.1
Graphical Modeling Framework (GMF)	64	3.6	19.2
AspectJ Development Tools (AJDT)	63	3.5	18.9
Mobile Tools for Java	59	3.3	17.7
PHP IDE Project	49	2.8	14.7
SOA Tools Platform	49	2.8	14.7
Device Software Development Platform (DSDP)	41	2.3	12.3
Embedded RCP	35	2	10.5
Dali EJB OR Mapping Project	34	1.9	10.2
Corona	27	1.5	8.1
Equinox	23	1.3	6.9
Higgins Trust Framework	22	1.2	6.6
Parallel Tools Platform	18	1	5.4
ALF	16	0.9	4.8
Mylar	16	0.9	4.8
Voice Tool Project	15	0.8	4.5
Total Responses	1778	100	532.3
50 missing cases; 334 valid cases			
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Barriers to Using Eclipse

Please rank the following considerations with regard to barriers to Eclipse (Open Source) adoption within your organization.	1 (Most important)	2	3	4	5 (Least important)	Relative Ranking
Lack of training for Eclipse	16.4	29.5	22.6	12.5	19.0	311.8
Concerns about using Open Source software	34.3	11.4	15.2	9.4	29.6	311.4
Lack of expertise in using Eclipse	22.2	18.9	21.1	17.0	20.7	304.8
Concerns about Open Source licenses	25.7	20.3	14.5	10.5	29.0	303.3
Lack of support for Eclipse	10.9	20.8	26.3	22.5	19.5	281.2
Lack of support for Eclipse plug-ins	11.7	15.8	20.0	27.5	24.9	261.9
Lack of training for Eclipse plug-ins	8.3	18.1	25.0	22.9	25.7	260.4
Technical limitations of Eclipse	9.5	17.8	21.9	19.4	31.4	254.5
Lack of certification for Eclipse plug-ins	6.8	15.2	22.8	21.1	34.2	239.2
New releases of Eclipse platform too frequently	6.6	13.6	25.6	20.9	33.3	239.2
Other	28.4	12.3	6.2	4.9	48.1	267.9

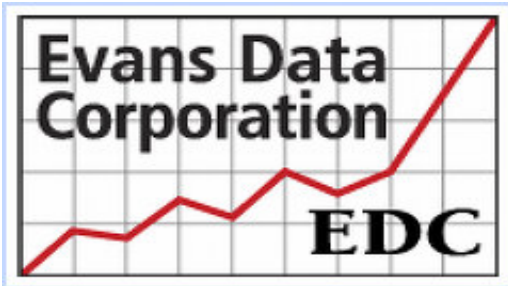
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Barriers to Using Eclipse Trend

- Concerns over using Open Source and lack of training are the most commonly cited reasons for not using Eclipse

Please rank the following considerations with regard to barriers to Eclipse (Open Source) adoption within your organization.	Relative Ranking 2005	Relative Ranking 2006
Lack of training for Eclipse	315.4	311.8
Concerns about using Open Source software	291.5	311.4
Lack of expertise in using Eclipse	327.8	304.8
Concerns about Open Source licenses	298.6	303.3
Lack of support for Eclipse	310.4	281.2
Lack of support for Eclipse plug-ins	300.2	261.9
Lack of training for Eclipse plug-ins	295.5	260.4
Technical limitations of Eclipse	296.4	254.5
Lack of certification for Eclipse plug-ins	270.3	239.2
New releases of Eclipse platform too frequently	*	239.2
Other	227.6	267.9
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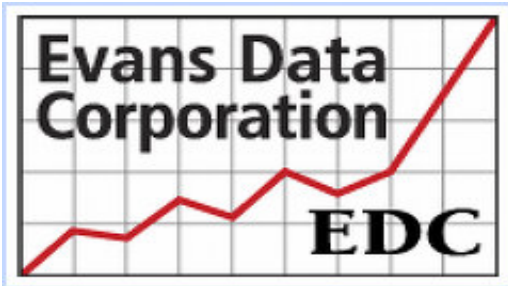


About Evans Data Corp.

Evans Data Corp provides market research for the development community. Our goal is to represent the views, attitudes, desires and opinions of the community of developers to those companies who create devices, tools, operating environments and other systems that developers use. We strive to help our clients be as successful as possible and to make the right choices regarding strategic direction and tactical product marketing. EDC offers three primary services including Multi-Client Surveys, Custom Surveys, and Targeted Analytics.

The information presented here is a small portion of the information Evans Data Corp has available through its syndicated research and custom research capabilities. For more information, please contact the author of this presentation, call Evans Data Corporation at 800-831-3080, or visit our Web site at www.evansdata.com.

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