

Public Sector Remix

IT Vendor Capability Survey Results

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Abstract

Agencies participating in the PSR (Public Sector Remix) project identified availability of third party support services as an essential enabler of free desktop software adoption. Without such support, switching to free desktop software presents an unacceptable risk. To counter the lack of information about what services are available, the project undertook an online survey of vendor capability. Analysis of the survey data showed that there is a rich choice of experienced desktop support service providers.

Introduction

The objectives of this survey were to determine the training and support abilities of IT Support vendors in New Zealand to provide to government agencies, if they were to adopt free and open source software on their desktops; and to identify the types of free and open source software used by these vendors.

Participants were invited to complete the online survey which comprised of questions relating to their organisational capabilities, contributions to free software and organisation characteristics. This information provided insight into current and future services, end user support and training, desktop configuration management, server integration, free software usage and project contributions.

The responses were all positive with many of the vendors leaving detailed and enthusiastic comments.

Background and Survey Administration

This survey was conducted by the NZOSS (New Zealand Open Source Society) and the School of Information Management at Victoria University of Wellington as part of the Public Sector Remix Project. The method of data collection for this research was via an online survey designed using the open source PHP web application, *LimeSurvey*.¹ There were 30 questions, with 21 closed questions and 9 open questions. It was available from 13 November to 18 December 2009, with reminders sent to encourage participation. The participants were representatives

¹ www.limesurvey.org

of New Zealand IT support vendors who were recruited via a number of communication channels. These channels included a press release from the New Zealand Open Source Society, general invitations sent to relevant email discussion lists, and personal invitations sent to individual company representatives.

There were 32 completed surveys, the results of which have been aggregated and summarised so that individuals and organisations cannot be identified.

Survey Results

Organisational Capabilities

Figure 1, *Organisational Support Capability*, shows the results for question 7. *Supporting a free software desktop and laptop fleet requires a range of complementary services. Please indicate which services your organisation is currently providing or planning to provide. If you prefer, you may just tick "Other" and fill in the text box. You will then have an opportunity to describe your free software desktop service capabilities in your own terms.*

The responses to "other" included:

- I can develop web and cross platform applications to aid in integration or conversion
- Security
- None, I provide services relating to web servers, not desktops or laptops
- Strategic services

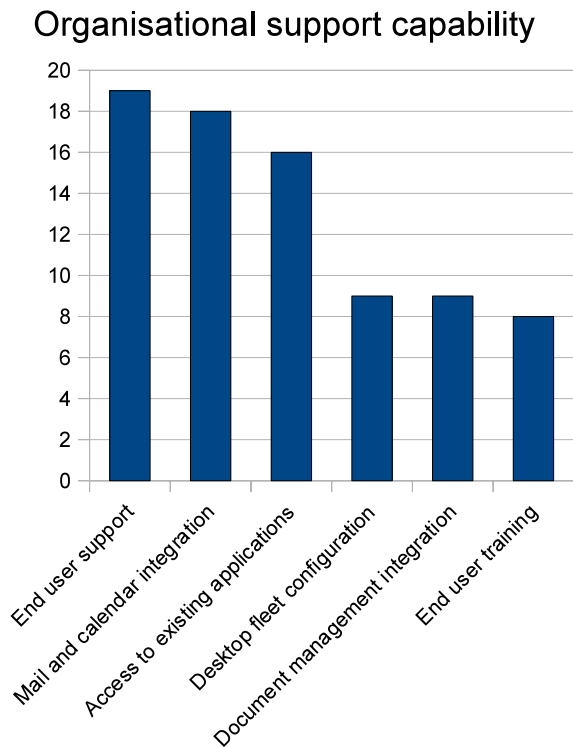


Figure 1. Organisational Support Capability

- Training in the Perl computer language
- Systems administration and development
- Enterprise reporting
- Extensive Open Source Business Solutions including ERP Telephony, Document Management , Business Intelligence
- Free Software Vendor
- Global support of Linux and other open source based solutions
- Plone Content Management System development
- Desktop/server integration (currently for Ubuntu desktops) to integrate Ubuntu desktops like Windos desktop in a MS Windows 'domain': Server authentication, shared drive 'mappings', roaming, user profiles (via Samba, NFS, etc.; NO Active Directory required!)
- CRM and CMS Services
- Integration
- VDI, Active Directory Integration
- Open Office
- Simulation, training, operations management
- Customisation and software development services

Organisations' Free Software End User Support Services

A free software desktop provides operating system, office productivity software, web and PDF browsers, email and calendar, and access to a wide range of business-specific applications. Please describe the free software desktop end user support services you offer or plan to offer, including the number and size of organisations for which you currently provide these services.

The results of this question suggest that there is plenty of end user support services on offer from at least the 17 vendors who chose to respond. Below is a summary of the services that vendors offer:

- Debian/GNOME Desktop with Browser to 90 users
- Support/installation configuration and training for Linux based OS and desktop FOSS applications
- Consultation, installation, integration, migration and maintenance of FOSS. Mixed set support services for Mozilla clients, GNU/Linux file, mail, print and web servers for use with both Linux and Windows systems for a number of small businesses (1–5 PCs).
- File/print services, email, VPN access, directory services, device syncing, shared calendars to 20+ organisations. Plans to support Linux-based desktops
- Support for openoffice, firefox, thunderbird on Kubuntu or Ubuntu.
- Implement and support Adempiere open source ERP, Pentaho Business Intelligence, ZoneMinder ERP, Asterisk phone systems
- Support group of approximately 80 members worldwide
- A full range of enterprise support services already delivered to over 10,000 organisations worldwide
- Install, train, customise, modify, integrate remote support to 10 organisations (NZ and Australia), ranging in size from 1 person to 100 seats.
- Services for businesses and schools but also home users with Linux desktops. Desktop support covering the main operating systems and free appli-

cations including Open Office, Firefox, Thunderbird, Gimp. Remote Support helper applications. Services include desktop OS installation, backend server integration, software update management etc.

- Level 2 support up to 24x7, provided to a number of NZ organisations ranging from 20 users up to 1000s of users.
- Design, build, configuration and support of basic free desktop and training on applications. Software development of business systems. Three medium sized organisations with the ability to scale higher.
- Support for Open Office productivity suite and Open Solaris providing multi nationals to small medium businesses, globally. Underlying end user support services. Large customer base.
- Support for open source OS particularly GNU/Linux

Although not currently providing these services, through past experience, vendor 51 explained in detail their ideal desktop set-up for customers used to proprietary software, including Kubuntu, Kmail, Okular, Open Office 3.0, OpenVPN, Mozilla Firefox and ClamAV. The reasoning behind each of these choices is fully explained in the vendor's answer.

Organisations' Free Software Training Services

End Users who are new to a free software desktop generally require training to gain familiarity with the new environment and to understand how it differs from their previous desktop. Please describe the free software desktop end user training services your organisation provides or plans to provide.

The responses to this question indicate that most users adapt readily to a new desktop, with little training.

Only seven vendors responded to this question regarding their training services. In their answer, vendor 51 provides an insight into why training services may not be an important aspect of free desktop software for vendors. They explain that most Windows or Mac users adapt to Kubuntu and Ubuntu well with only limited training required. This is because applications are relatively self explanatory with many reflecting the usage of familiar proprietary products. They also mentioned that being on hand for support calls seems to be more effective than training. Free phone support, documentation and a helpdesk product are also available for their support customers. Most of the responses from the rest of the vendors indicate that vendor 51's assumption regarding training is accurate with several offering minimal familiarisation training and one on one as required. However, a couple provided, what appear to be, more complex training courses and it was interesting to see that vendor 17 has a qualified teacher on staff for training end users to work with various FOSS applications and are in the process of creating a demand for this sort of training service.

Organisations' Free Software Fleet Management Services

To manage a free software desktop fleet, IT staff need to provide a range of ancillary services for users. These include configuration management and deployment, version control, support staff training, and remote desktop support. Please describe the free software desktop fleet management services you offer or plan

to offer, including the number and size of organisations for which you currently provide these services.

All seven vendors who answered this question offer free software desktop fleet management services. Two (9 and 51) described the desktop fleet management that they use or prefer in detail, vendor 9 mentioning that they provide support to a single organisation with 90 users. The others all referred, or at least alluded, to the fact that they provide full services to their customers and mostly open source, one delivering support services to over 10,000 organisations worldwide.

Organisations' Capabilities to migrate users from Proprietary to Free Software Desktop Email and Calendar Services.

A free software desktop requires access to server-based applications for email and shared calendars. These may be free software-based server applications, or may involve integrating a free software desktop with existing proprietary systems (including software-as-a-service). Please describe your organisation's capabilities to migrate users from proprietary to free software desktop email and calendar services, including integration with existing services and migration to newer free software-friendly services.

Of the 32 vendors, 16 provided a response to this question regarding their organisation's capabilities to migrate users from proprietary to free software desktop email and calendar services, including integration with existing services and migration to newer free software-friendly services. Eighteen different software packages were mentioned including Kmail, Evolution, Pidgin and Zarafa. Zimbra, Scalix and Thunderbird were the only ones mentioned by more than one vendor. Many of the vendors expressed that they were capable of full or partial migrations from proprietary to free email and calendar software with most appearing to have had plenty of successful experience in this area. A lot of advice was offered especially by vendor 51 who gave a very enthusiastic and detailed response. This data indicates a high level of support for free software desktop email and calendar services.

Organisations' Capabilities to migrate users from Proprietary to Free Software Desktop Management Systems

A free software desktop requires access to server-based applications for electronic documents and records management. These may be free software applications, or may involve integrating a free software desktop with existing proprietary services. Please describe your organisation's capabilities to migrate users from proprietary to free software desktop document management systems, including integration with existing services and migration to newer free software-friendly services.

There were seven responses to this question regarding the organisation's capabilities to migrate users from proprietary to free software desktop document management systems, including integration with existing services and migration to newer free software-friendly services. The software mentioned includes:

- Samba
- OpenVPN
- Open Office

- Inkscape
- GIMP
- Scribus
- Virtualbox
- Combined Alfresco/Drupal System
- Alfresco
- Ingres

There appears to be less experience in migrating to free software document management systems than email and calendar services. Of the seven responses, two have limited or no experience in the migration process of document management systems. Those that have had experience once again offer advice based on their organisation's methods of migration and integration. Vendor 51 is equally knowledgeable in this area, as the question before, providing a detailed process and recommendations.

Organisations' Capabilities and Experience in Migrating Users to a Free Software Desktop with Respect to Existing Systems

Most Agencies have a number of pre-existing and mission-critical business applications to which people need access. These may be modern browser-based systems (including software-as-a-service) or older client-server applications. Some browser-based systems require use of a particular browser. Some client-side modules require a particular operating system. Please describe your organisation's capabilities and experiences in migrating users to a free software desktop while ensuring continued user access to existing systems.

No participants provided comments to this question. This is a possible indicator that organisations do not yet have the capability and experience to continue access to existing systems in a free software desktop migration. However, it could also signify that companies with legacy systems are averse to adopting open source software, possibly for fear of losing access to them.

Other Free Software Desktop Related Services That Organisations Offer

Please describe any other free software desktop related services that your organisation offers or is planning to offer. This question gives you the opportunity to describe your capabilities in your terms.

This question was well received with 22 responses indicating a broad range of capabilities. Below is a few samples of the free software desktop related services on offer:

- I can provide consulting services around selecting free software alternatives to proprietary choices and to develop migration plans to assist organisations planning to move away from proprietary solutions. I can design processes and procedures around a desktop/laptop fleet with centralised configuration and help set up an internal department in the organisation to manage the transition and future support services. I can't do everything—I'm only one person—but I can design and plan the process and employ staff and handover to them.—*Vendor 5*

- [Vendor] will configure and deliver support services on a specific customer basis ranging from full outsourcing and application management to simple telephone support services.—*Vendor 36*
- We provide small to medium sized organisation (2 to 50+ desktops) with desktop and server build, migrate and support services. Free software or mixed proprietary and free software system. (Our passion is for totally FLOSS solutions tho.) Webserver setup and support. Mail server setup and support. Video streaming solutions. Gnu/Linux based Digital Audio Workstations for capture and mastering.—*Vendor 43*
- [Vendor] is capable of providing support for most desktop applications required by businesses and other organisations. In addition to support, we are also capable of providing customisation and software development work to modify applications as well as developing open source replacements for legacy internal applications and performing migrations from these platforms.—*Vendor 97*

Organisational Contributions to Free Software

Figure 2, *Ways Organisations Help to Build Stronger Free Software Communities in NZ*, shows the results for question 15. *Organisations can use or contribute to free software projects in several ways. In what ways does your organisation help to build stronger free software communities in New Zealand?*

The “other” responses included a mixture of ways organisations strengthen the free software community, with several involving themselves in free and open source software events and some developing open source software and releasing it under GPL licenses. Simply advocating free software is common; several of the vendors speak at events and even publicise free software over the radio.

Figure 3 on the following page, *Free Software Desktop Operating Systems Organisations Use*, shows the results for question 16. *There are several popular*

Ways Organisations Help to Build Stronger Free Software Communities in NZ

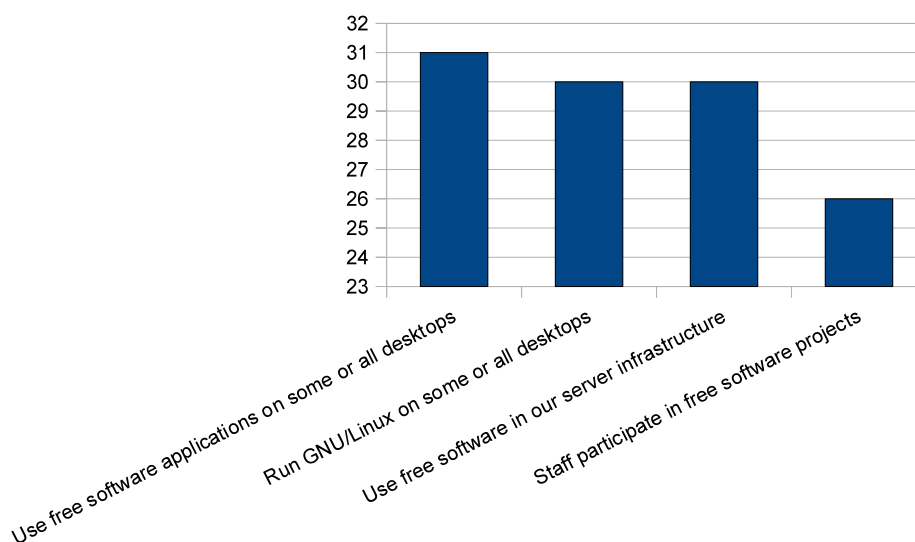


Figure 2. Ways Organisations Help to Build Stronger Free Software Communities in NZ

GNU/Linux distributions suitable for the business desktop. Which free software desktop operating system(s) does your organisation use?

Figure 4 on the next page, *Free Software Products Organisations Use*, shows the results for question 17. A wide range of free software options is available for common (and not so common) desktop tasks. Which of the following software products does your organisation use?

Other Free Software Desktop Products Organisations Use

Please list any other free software desktop products your organisation uses, up to a maximum of 5 products.

There was a large assortment of other free software desktop products used by the vendors with several listing the maximum of five products. The most common, with six vendors listing it, was the IM Client Pidgin, otherwise they were mostly all different. The types of products ranged from twelve different business management tools, including Tomboy and OpenProj, to four different desktop environments. There were also communication, engineering, media, programming, security, and web tools listed.

Figure 5 on the facing page, *Free Software Products Organisations Run on their Servers*, shows the results for question 19. A wide range of free software options is available to support an organisation's server infrastructure. Which free software products does your organisation run on its servers? This question excludes server-based business applications such as content management systems.

There was a number of products listed under "Other". Vendor 59 uses lots of self written software, released under the GPL as well as many others including phpMyAdmin. The other seven vendors listed nine different products including Nagios, Roundcube, and FreeBSD which was listed twice.

Other Free Software Server-Based Business Applications Organisations Use

Please list any free software server-based business applications your organisation uses, up to a maximum of 5 products. For example: blogs, wikis, content

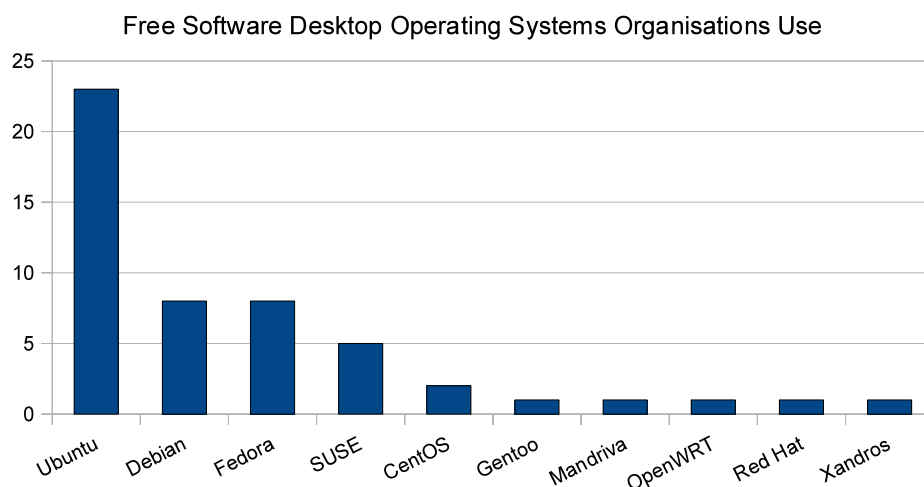


Figure 3. Free Software Desktop Operating Systems Organisations Use

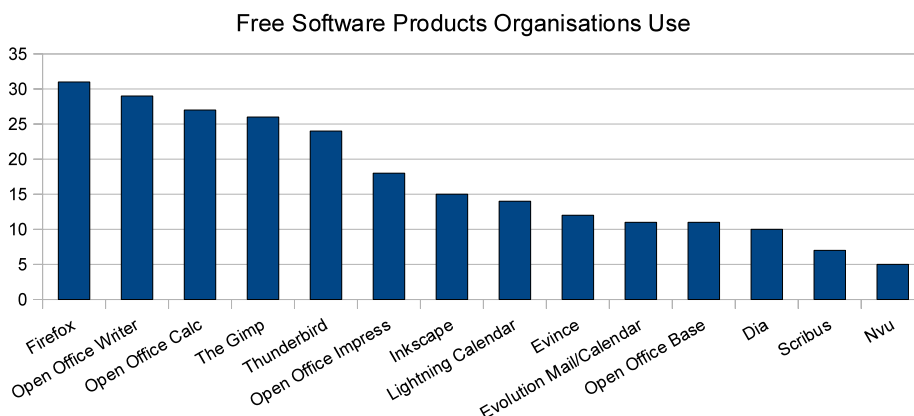


Figure 4. Free Software Products Organisations Use

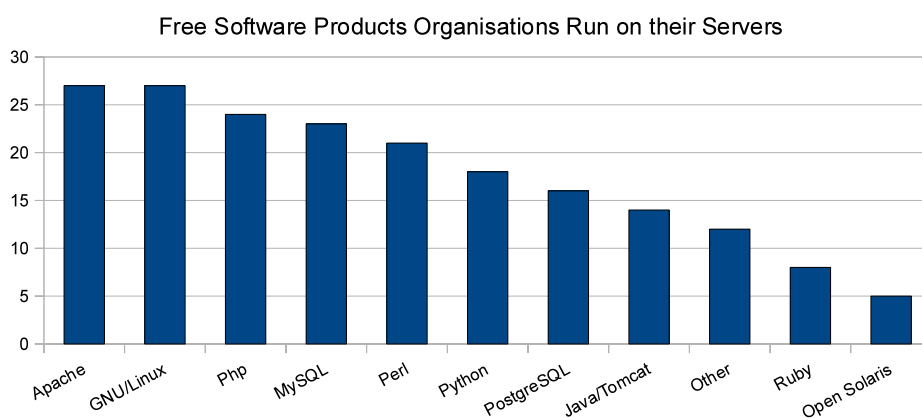


Figure 5. Free Software Products Organisations Run on their Servers

management systems etc.

The response to this question was intriguing as although a lot of the vendors contributed, with some listing more than the maximum of five free software server-based business applications their organisations use, the answers were almost all different. There were over 50 individual applications falling into several categories. The largest category was business management tools which contained LimeSurvey, online survey application; SQL-Ledger, accounting system; Sugar-CRM, CRM; and several more. Drupal, a content management system, was listed eight times; Joomla, four times; along with four other CMSs. Communication tools were also prominent, with eight different applications counting Wordpress, a blog publishing application, which was listed five times. MediaWiki, wiki software, was also listed five times along with a range of other web tools.

Free Software Projects to Which Organisations and their Staff Contribute

People contribute to free software projects in several ways, e.g. as developers, testers, documenters (technical and end user), answering users' questions, project hosting. People may do this as a part of their normal job or as a professional development activity. You may need to ask your staff about that they

do. In many cases, people contribute in their spare time, sometimes to more than one project. Please list up to 5 free software projects to which you or your staff contribute.

This was another question met with an intriguing response, again almost every project listed was different. The cause of so many projects, many working towards similar goals, could likely be from a lack of communication in the free software community. Collaborating and combining knowledge could perhaps be a more effective and efficient way of developing this community, but possibly not reasonable. The project contributed to by the most vendors or their staff is Drupal, a content management system. As well as that, Ruby, programming language; Ubuntu and Debian, operating systems; and ADempiere, ERP, were all listed twice. Otherwise, more than 50 individual projects were each listed once. These were sorted into nine categories. Business management tools again contained the most projects including eXoPlatform, ECM; Open ESB, enterprise service bus; and Koha, ILS. Three other operating systems were named besides the other two mentioned above, they were Open Solaris, Kubuntu and FreeBSD. Vendor 59 contributes to several of their own open source projects and vendor 66 mentioned LinuxChix, a women-oriented Linux community.

Figure 6, *Most Significant Contributions Organisations' Staff Make to Projects*, shows the results for question 22. *Choose the free software project to which the largest number of your staff contribute. What are the most significant contributions they make to this project?*

The responses to "Other" included:

- Develop Add-Ons
- Events
- Local Communities

Other Ways That Organisations Help to Build Stronger Free Software Communities in NZ

Please describe any other ways in which your organisation helps to build stronger free software communities in New Zealand.

This question had a very enthusiastic response from 23 vendors, offering a number of different ways their organisations help to build stronger free software

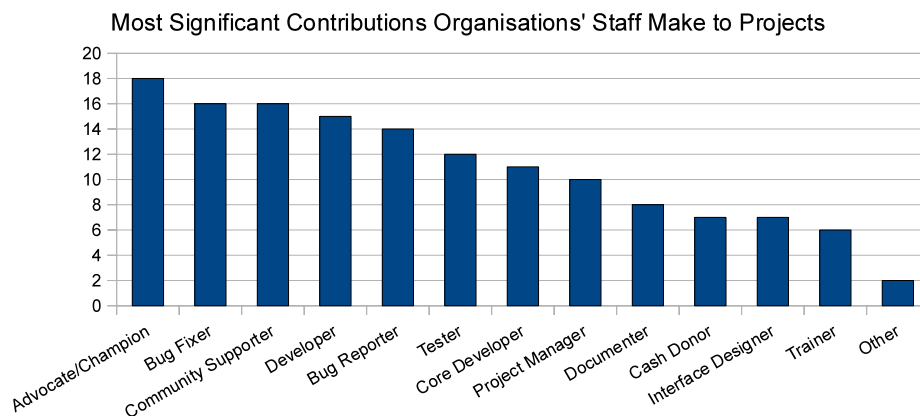


Figure 6. Most Significant Contributions Organisations' Staff Make to Projects

communities in New Zealand. Many of the vendors help by advocating and actively promoting free and open source software via many different streams. Radio broadcasts, sponsoring events, supporting NZ organisations, attending conferences, recommending FOSS, contributing to projects, and being members of NZOSS are just some of the ways organisations contribute. One of the vendors strongly pushes for open source to be used in schools involving themselves in educational events, sponsoring schools to go to OS conferences and donating money to OS-focused schools. Another vendor sponsors free and open source services to organisations that they believe will expose those capabilities to lots of people.

The number of comments and the amount of effort that vendors put into supporting FOSS clearly illustrates that they are keen to see a stronger free software community in New Zealand and are prepared to help build this in many different ways.

Organisation Characteristics

Figure 7, *Organisation Size*, shows the results for question 24. *How many full time equivalent staff does your organisation have in New Zealand?* Over 80% have fewer than 10 staff. This may act as a constraint on the pace at which larger agencies adopt free software on the desktop.

Figure 8 on the next page, *Size of Largest Customer Provided with Free Software Desktop Services*, shows the results for question 25. *Looking at the largest customer organisation for which you provide free software desktop services, how many free software desktop seats does this cover?* Over 85% are organisations with fewer than 500 seats and almost 60% have fewer than 100.

Figure 9 on the following page, *Total Revenue Derived from All Services Based on Free Software*, shows the results for question 26. *In the last complete financial year, approximately what percentage of your organisation's total revenue was derived from all services based on free software?* About 60% of respondents derive over half their revenue from free software services.

Figure 10 on page 13, *Revenue from Free Software Services Derived from*

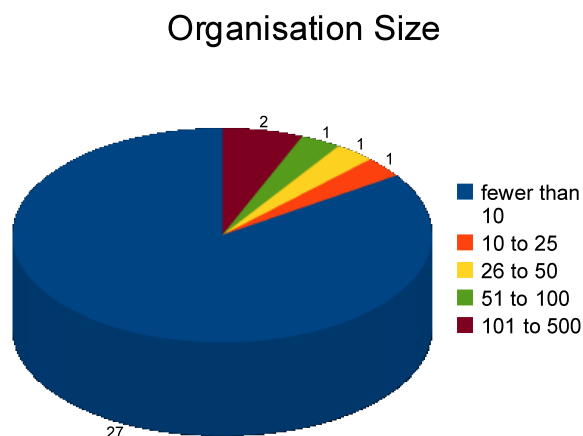


Figure 7. Organisation Size

Size of Largest Customer Provided with Free Software Desktop Services

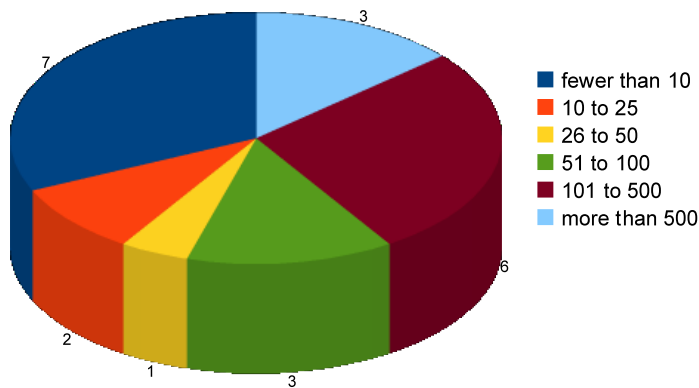


Figure 8. Size of Largest Customer Provided with Free Software Desktop Services

Total Revenue Derived from All Services Based on Free Software

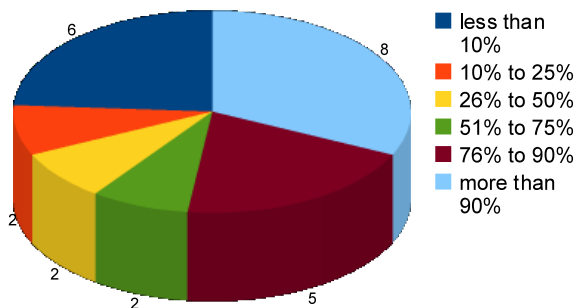


Figure 9. Total Revenue Derived from All Services Based on Free Software

Free Software Desktop Support Services, shows the results for question 27. *In the last complete financial year, of the revenue from services based on free software, approximately what percentage came from free software desktop support services?* There is currently little demand for desktop support. Half the respondents earn less than 10% of their revenue from desktop support services and for over 80% it accounts for less than 25% of their revenue.

Figure 11 on the facing page, *Expected Revenue Derived from All Services Based on Free Software*, shows the results for question 28. *In the next financial year (the one after your current financial year), approximately what percentage of revenue do you expect will derive from all services based on free software?* The proportion of respondents expecting to derive over half their revenue from free software services rises from 60% to 70%, indicating that they see potential for growth in this area.

Revenue from Free Software Services Derived from Free Software Desktop Support Services

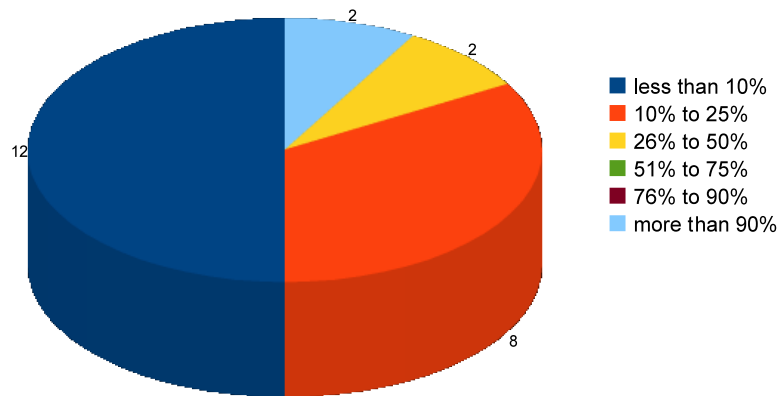


Figure 10. Revenue from Free Software Services Derived from Free Software Desktop Support Services

Expected Revenue Derived from All Services Based on Free Software

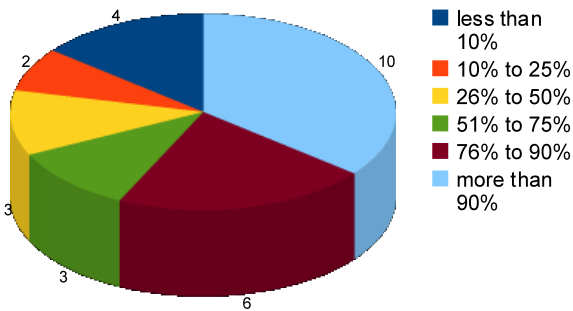


Figure 11. Expected Revenue Derived from All Services Based on Free Software

Figure 12 on the next page, *Expected Revenue Derived from Free Software Services Based on Free Software Desktop Support Services*, shows the results for question 29. *In the next financial year (the one after your current financial year), of the revenue based on free software, approximately what percentage do you expect will come from free software desktop support services?* Respondents see this as the main area where the growth will occur. The proportion expecting to earn less than 10% of their revenue from desktop support services drops from half to one third. Similarly, the proportion expecting it to account for up to 25% of their revenue drops from over 80% to 70%. In contrast, the proportion expecting to derive over 50% of their revenue from free software desktop support services increases to 8% to 15%.

Expected Revenue Derived from Free Software Services Based on Free Software Desktop Support Services

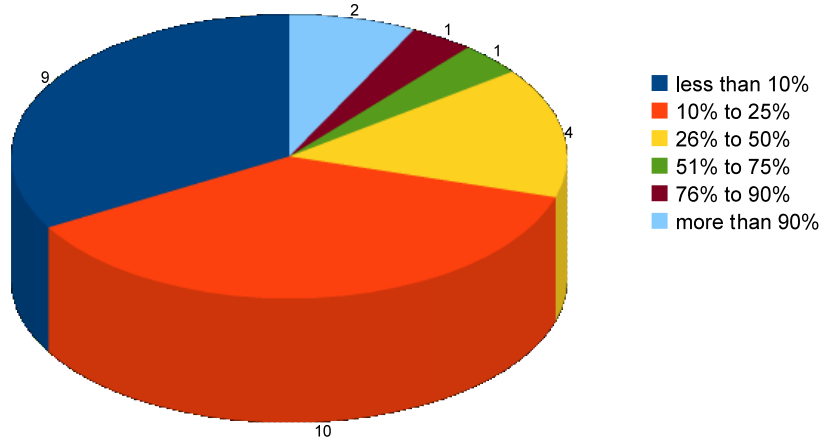


Figure 12. Expected Revenue Derived from Free Software Services Based on Free Software Desktop Support Services

Comments

The survey invited respondents to add comments to help the PSR project to evaluate and promote free software in the public sector.

This is the first survey of its kind in New Zealand and your views are important to help accelerate adoption of free software in the public sector. Please provide any other information that may help the Public Sector Remix project to evaluate your organisation's capabilities and services relating to free software desktop deployment and support, and to promote its wider adoption within the public sector. For example, what benefits does your company get from running free software on the desktop?

The most widely-noted benefit of free software was *freedom from vendor lock-in*.

There were 21 comments left by vendors for this question with most reviewing the vast benefits of free and open source software. Many of the vendors discuss how vendor lock-in is not an issue like it is with proprietary software indicating that it is one of the most highly viewed advantages of FOSS. As well as this, flexibility, cost, efficiency, reliability, simpler licensing and knowledge-sharing are just some of the concepts that appear in the responses. Below are a few sample comments from the data:

- I've always run free software on my own desktop, and the greatest advantage it gives me is low-barrier access to a wide range of excellent technology. It allows me to offer customers excellent value products (in the past mainly for servers). I have just started to offer free software desktop services to my first customer. Once this is consolidated, there is potential to offer this to other customers. — *Vendor 9*
- We benefit by not having to maintain an expensive "compliance" administrative layer; anyone can install any Free Software. We benefit by gener-

ating our use cases for how the free desktop can support edge cases—and how it gets some of them wrong, and what workarounds are needed. We can point to the range of work that we can do on the desktop to reassure people moves are possible. We benefit by having a stable base for our work, by significantly reducing our risk from common malware, and by having our software developed by people who actually care about how well they work (instead of just shipping some bling features).—*Vendor 22*

- For the public sector, the ability to script and lock down installs, manage updates directly, and replicate the setup over 5, 50, 500 or 5,000 desktops has to be compelling. Updates are not a Wednesday surprise with open source. Any user can have any productivity application they require, without need for a licence management team. Desktops that don't need rebooting is also a bonus, especially for mission critical or don't dare disrupt type users. Customisations are easy to make, and easy to replicate.—*Vendor 46*
- The [F]OSS development approach has helped produce reliable, high quality software quickly and inexpensively. Besides, it offers the potential for a more flexible technology and quicker innovation. It is said to be more reliable since it typically has thousands of independent programmers testing and fixing bugs of the software. It is flexible because modular systems allow programmers to build custom interfaces, or add new abilities to it and it is innovative since open source programs are the product of collaboration among a large number of different programmers. The mix of divergent perspectives, corporate objectives, and personal goals speeds up innovation.—*Vendor 63*
- [Vendor's] Linux engineers are Red Hat Certified Engineer qualified and have experience with delivering commercial server and desktop solutions for businesses of various sizes. [Vendor] uses open source software extensively on all our internal systems due to the flexibility it provides, with the ability to customise, secure and control the software to meet our requirements as well as not having to be dependant on a single vendor.—*Vendor 97*

Conclusions

The survey has shown that there is plenty of experienced end user support services on offer. Respondents stated that most users adapt readily to a new free software desktop, with minimal training. A number of vendors offer desktop fleet management and other related services. Free software alternatives are readily available and proven for all standard desktop functions. However, respondents noted that vendors of proprietary document management systems have been slow to support free software alternatives on the desktop. Agencies planning to adopt free software on the desktop, either wholly or in part, will need to develop strategies for document management and take steps to remove the barriers presented by proprietary document management systems. The most frequently cited benefits of free software were freedom from vendor lock-in, flexibility and cost savings.

The most widely installed free software desktop configuration that respondents reported is:

- Ubuntu (including Kubuntu), mentioned three times as often as the next two, Fedora and Debian
- Firefox (web browser)
- OpenOffice (Writer, Calc and Impress office productivity tools)
- The Gimp (image editing)
- Thunderbird (mail)
- Inkscape (drawing)
- Lightning (calendar)
- Evince (PDF reader)

Most respondents run the GNU/Linux, Apache, MySQL (or PostgreSQL), PHP, Perl and Python software stack on their servers. They contribute to a wide range of free software projects (nearly 60 different projects were mentioned) and actively promote use of free software.

While most of the organisations responding were small (fewer than 10 people), the companies they support included large organisations (500 seats and above), showing that free software has moved into the wider community. Many of the respondents expect increases in the proportion of their revenue that comes from free software and services in their next financial year. When reading the comments, what shines through clearly is the passion and commitment that those responding have for free software.