

Penn, Schoen & Berland Survey Results

Key Findings

Customers benefit from the Novell-Microsoft collaboration. Over nine out of ten Information Technology (IT) Decision Makers approve of the Microsoft and Novell collaboration, believing it will benefit IT customers and increase interoperability of IT systems.

Customers are more likely to choose SUSE Linux as a result of Novell's collaboration with Microsoft . After hearing about the Microsoft and Novell collaboration, over two-thirds say they are more likely to consider deploying SUSE Linux at their corporation. Red Hat users are also very supportive of the agreement between Novell and Microsoft, and are more likely to deploy SUSE Linux at their corporations.

Platform providers should work together to solve interoperability problems. Customers want their platform providers to work together to improve the interoperability of their systems and provide tools that make it easier for the end user to navigate both Linux and Windows environments.

Customers remain concerned about potential intellectual property issues with Linux. Over seven in ten are more likely to deploy Linux with intellectual property rights, which would limit their corporation's exposure to risk. Nearly nine in ten see it as the responsibility of their software vendors to work out intellectual property issues before deploying services.

The Concept

- Nearly all respondents agree with improving interoperability, products working well together, and having tools that make it easier to manage mixed Windows and Linux environments.
- They believe technology companies should be responsible for the intellectual property rights.
- Those with a mixed SUSE Linux and Windows environment have slightly higher agreement scores on all statements.

Do you agree or disagree with this statement? Ranked by All Agree	All	Mixed SUSE/ Windows	Red Hat Users
	% Agree	% Agree	% Agree
I want platform providers to improve the interoperability of their systems.	97	100	95
Technology companies should create partnerships to ensure that their products work well together.	93	96	89
I want tools that make it easier to manage IT environments that have both Windows and Linux.	92	98	94
Technology companies, not end users or businesses, should take responsibility for the intellectual property in the products they ship and service.	89	96	83
Customers would benefit if leading Linux distributors and Microsoft partnered more closely with one another.	87	92	86
Technology companies should acquire the intellectual property rights to their competitors' products when necessary, so their customers are not exposed to any risks.	82	87	83
My organization would consider doing more business with Linux distributors if they had a technical alliance with Microsoft.	80	88	75
I am more likely to deploy Linux that comes with intellectual property rights, which reduces my company's exposure to risk.	71	79	87

Microsoft and Novell Partnership

- Two-thirds are aware of the collaboration between Microsoft and Novell.
 - Awareness is higher among those with a mixed SUSE Linux and Windows environment and Red Hat users.
- Nearly all respondents approve of the collaboration and believe it will benefit IT customers and improve the interoperability of IT systems.
- There is also strong support that the collaboration will lead to decreased patent infringement risks for IT customers.

<i>Have you heard anything about the recent collaboration between Microsoft and Novell?</i>	All	Mixed SUSE/Windows	Red Hat Users
Yes	67	81	75
No	33	19	25

ALL RESPONDENTS SAW THE FOLLOWING: **On November 2nd, Microsoft and Novell announced a set of broad business and technical collaboration agreements to build, market, and support a series of new solutions to improve interoperability for customers and make Novell and Microsoft products work better together. The two companies also announced an agreement to provide each other's customers with patent coverage for their respective products.**

<i>Overall, do you approve of this collaboration between Novell and Microsoft?</i>	All	Mixed SUSE/Windows	Red Hat Users
Approve	95	100	89
Do not approve	5	0	11

<i>Overall, do you believe this collaboration will benefit IT customers?</i>	All	Mixed SUSE/Windows	Red Hat Users
Yes	91	98	87
No	9	2	13

<i>Do you believe this collaboration will improve the interoperability of IT systems?</i>	All	Mixed SUSE/Windows	Red Hat Users
Yes	90	92	87
No	10	8	13

<i>Do you believe this collaboration will decrease patent infringement risks for IT customers?</i>	All	Mixed SUSE/Windows	Red Hat Users
Yes	75	88	78
No	25	12	22

- Respondents agree the collaboration will benefit Microsoft's and Novell's customers, increase the interoperability of the two companies' systems and remove potential IP and patent infringement risks.

Based on this collaboration between Novell and Microsoft, would you agree or disagree with the following? Ranked by All Agree	All	Mixed SUSE/Windows	Red Hat Users
	% Agree	% Agree	% Agree
This agreement between Novell and Microsoft will benefit both companies' customers.	91	98	87
The agreement will enable increased interoperability between Linux and Windows systems.	88	94	81
With their agreement, Novell and Microsoft are removing their customers' potential risks around intellectual property and software patent infringement.	86	92	79
I'm more likely to consider deploying Novell SUSE Linux in my company	67	81	79

- Over three in five respondents think Microsoft is making a stronger effort to form alliances with other companies.

Do you think Microsoft in general is making a stronger effort to form alliances with other companies so their software works better with Microsoft's; less of an effort; or about the same? Ranked by All	All	Mixed SUSE/Windows	Red Hat Users
Stronger effort	61	77	54
About the same	21	13	30
Less of an effort	18	10	16

Does this collaboration make you more favorable to Microsoft, less favorable or have no impact on your view of Microsoft?	All	Mixed SUSE/Windows	Red Hat Users
More favorable	67	83	70
Less favorable	10	4	10
No impact	23	13	21

Demographics

Which of the following operating systems does your company currently use in its IT infrastructure? Please select all that apply. Multiple responses permitted. Ranked by All	All	Mixed SUSE/Windows	Red Hat Users
Microsoft Windows	98	100	100
Sun Solaris	36	48	59
IBM-AIX	35	48	49
Red Hat Enterprise Linux	31	40	100
Novell SUSE Linux	26	100	33
Free Linux that is not backed or supported by a commercial Linux company	19	38	30
Other	8	10	16

Research Overview

Objectives: Measure market perception of the recent collaboration between Microsoft and Novell.

Methodology: 201 online interviews in the United States.

Timing: November 17 – 20

Audience: Information Technology Decision Makers – An IT executive, manager or staff whose primary job is either in a formalized IT, information systems or MIS department, or one who performs IT functions in a non-IT, ISM, or MIS department, with significant decision-making authority related to technology purchases. Their organizations have to have at least 500 PCs.

PSB did not intentionally target, but tracked results for ITDMs whose companies deploy both Microsoft Windows and Novell SUSE Linux and Red Hat Users.

All figures in the report are percentages unless otherwise noted.

Audience	N-Size	Margin of Error @ 90% Confidence
ITDMs	201	± 5.8%
Mixed SUSE/Windows	52	± 11.4%
Red Hat Users	63	± 10.4%

