

***3rd Annual
Eclipse Global Enterprise Survey
Research Findings***

Public Version

Evans Data Corporation

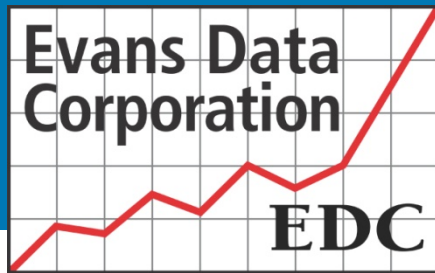
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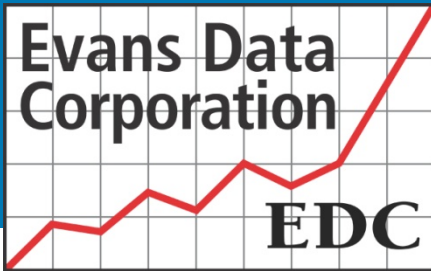
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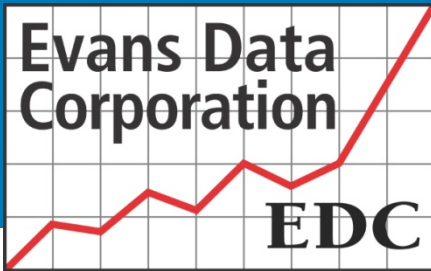
Background and Overview

- The 3rd 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 and Eclipse-based 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 respondents work in companies with greater than 250 employees
- The global distribution of respondents was consistent with past reports (58% North America, 19% EMEA, 23% APAC)



Preface

- ❑ This is the third year that Evans Data Corporation has fielded this survey for the Eclipse Foundation. The survey this year returns to the demographic profile of the 2005 annual report, whereas the 2006 data set had an increased focus on Eclipse usage in very large companies (38% of whom belonged to a company with 25,000+ employees)
- ❑ The current study is consistent with the global developer population, in accord with Evans Data Corporation's bi-annual Global Developer Population and Demographic Survey series
- ❑ For year-on-year comparisons, the reader is encouraged to draw trends on the basis of deltas between this 2007 report and the 2005 report. As noted in the executive summary below, trending between these two reports reflects positively for Eclipse, showing continued adoption and overall optimism for increased spending amongst smaller companies as well as the larger companies.



Respondent Demographics Summary

The findings focus exclusively on organizations with 250 or more employees:

- 31% from companies >250-1000
- 48% from companies >1,000
- 21% from companies >25,000

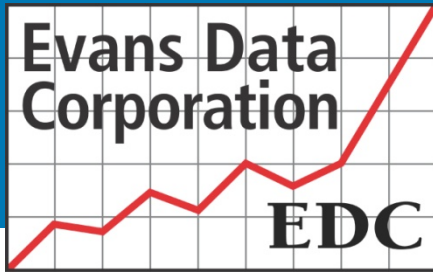
All respondents use/are aware of Eclipse-based products:

- 42% as primary IDE
- 25% occasionally
- 33% are aware of it

Respondents are in various roles including:

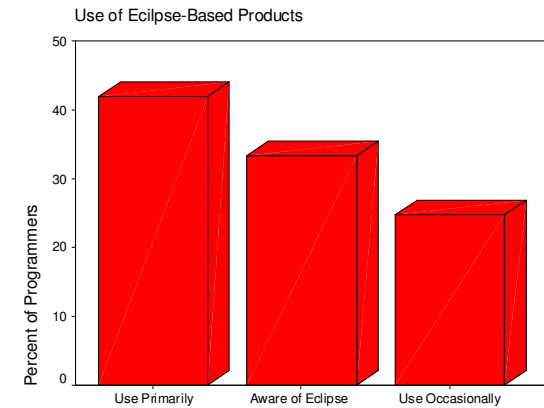
- 31% are VP, CTO, CIO, MIS, and IT and other management and business-related roles
- 30% are programmers/software engineers
- 39% are in other business and technical roles such as web developer, software architect, architect/DBA, systems analyst, business analyst and product manager

Eclipse usage and awareness is widely dispersed across the industries



Use of Eclipse-based Products

- Despite fluctuation in experience levels of Eclipse usage among respondents over the course of the last two years, with an uptick last survey, one generally finds an increase in the number of respondents who are using Eclipse as their primary IDE or do so occasionally

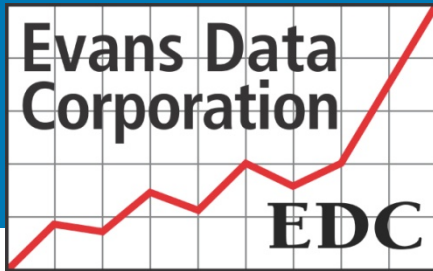


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Which of the following best describes your knowledge / use of Eclipse or Eclipse-based products (such as IBM Rational Application Developer, MyEclipse, WindowBuilder, Compuware OptimalJ or others)?	Valid Percent 2005	Valid Percent 2006	Valid Percent 2007
Currently use as primary IDE	32.5	60.4	41.9
Currently use occasionally as an IDE	19.6	20.3	24.7
Aware of Eclipse or Eclipse-based products	47.9	19.3	33.3

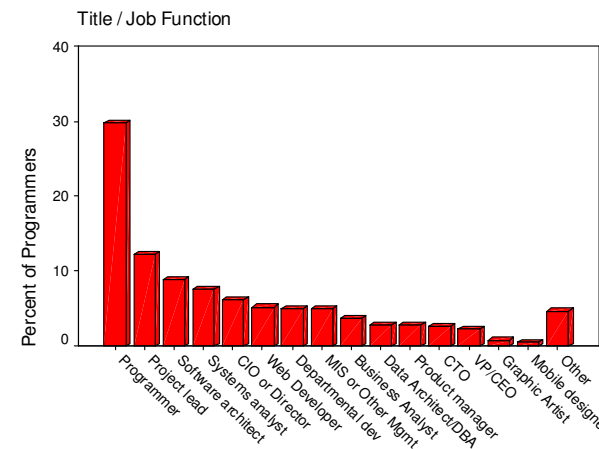
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Job Title/Role

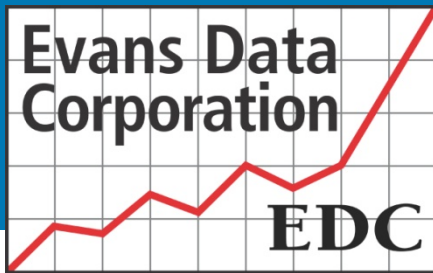
- Note that the options to this question continue to become more granular, revealing more developer and management roles
- Combined, the various management roles make up a third of the sample
- The title of programmer/software engineer comprises nearly three in ten respondents (30%)
- Approximately 39% are in other business and technical roles (e.g., business analyst, DBA)



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Which best describes your title or job function?	Valid Percent 2005	Which best describes your title or job function?	Valid Percent 2006	Which best describes your title or job function?	Valid Percent 2007
Programmer/software developer	42.6	Programmer / software engineer	29.2	Programmer / software engineer	29.7
Team leader/project manager	27.5	CTO, CIO or Director	18.0	Project lead/team leader	12.2
Development manager or director	8.6	Software architect	13.3	Software architect	8.9
Chief architect or CTO	8.1	Project lead / team leader	13.1	Systems analyst	7.6
MIS manager or director	4.2	Systems analyst	6.8	CIO or Director	6.3
Executive management	2.5	IT, MIS or Other Management	5.5	Web Developer	5.2
Testing Manager	1.2	Departmental Development manager	4.7	Departmental Dev Mngr	4.9
Line of business manager	0.7	Product manager	2.9	MIS or Other Mgmt	4.9
Other	4.6	Software Tester/Testing Manager	1.8	Business Analyst	3.6
		Database Administrator	0.5	Data Architect/DBA	2.9
		VP	0.5	CTO	2.6
		Other	3.7	VP/CEO	2.3
				Graphic Artist	0.8
				Mobile designer/developer	0.5
				Other	4.7

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Company Size

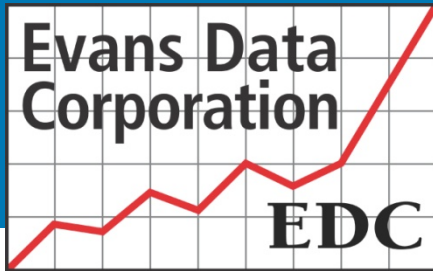
Compared with 2006, the following are changes in respondent representation:

- Increase in mid-size companies of >250-1,000 employees (from 23% to 31%)
- Negligible change in large companies of >1,000-10,000 (from 29% to 37%)
- Decline in enterprise-sized organizations of > 10,000 (from 45% to 30%)
- Decrease in very large companies with >25k+ (from 37% to 21%)

	Valid Percent 2005	Valid Percent 2006	Valid Percent 2007
About how many people does your company employ at all locations?			
250-500	12.4	11.7	15.1
501-1,000	11.5	11.2	16.4
1,001-2,000	9.7	10.4	11.2
2,000-10,000	25.1	18.2	24.5
10,001- 25,000	11.3	7.8	9.1
Over 25,000	28.1	37.2	20.8
Don't know	1.8	3.4	2.9

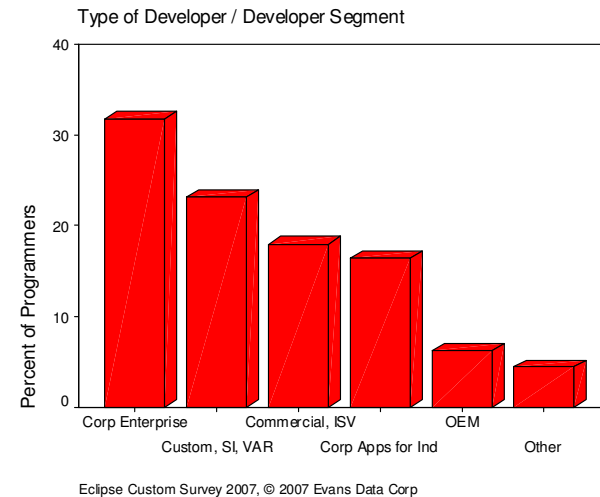
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Developer Segment

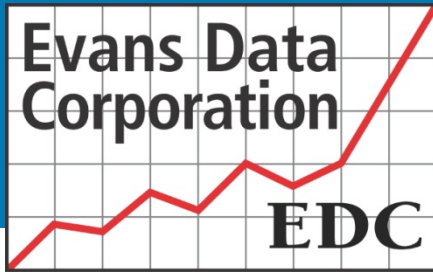
- The largest group of respondents (over three in ten) are most involved with corporate enterprise applications for use inside their companies, although a decline from previous years
- The largest increase year over year is from those who develop custom apps outside their company (SI, VAR)
- The third largest group develops commercial applications for sale outside their organization (i.e., ISVs), followed by those who write applications for individuals, small workgroups or departments



Which of the following best describes the type of applications you work on MOST OFTEN?	Valid Percent 2005	Valid Percent 2006	Valid Percent 2007
Corporate-wide enterprise applications for use inside your company	41.4	43.7	31.8
Commercial applications for sale to people outside your company (ISV)	18.5	25.4	18.0
Applications for individuals, small workgroups, or department	14.6	11.3	16.4
Custom applications of any kind for clients outside your company (SI, VAR)	13.0	12.0	23.2
Applications or utilities to support specific devices your company makes or sells (OEM)	6.0	3.1	6.3
Open source software	2.3	*	*
Other	4.2	4.5	4.4

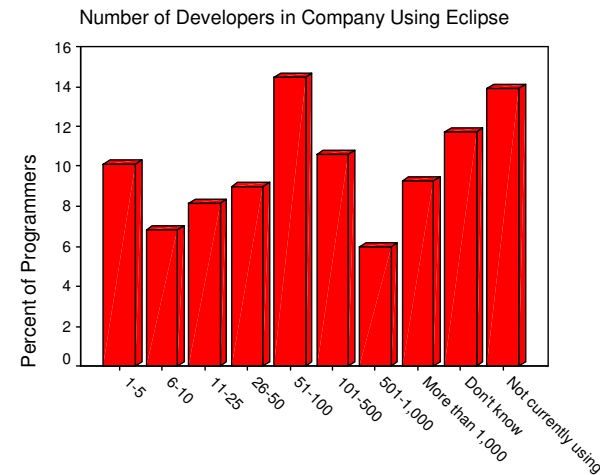
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Number of Developers Using Eclipse in Company

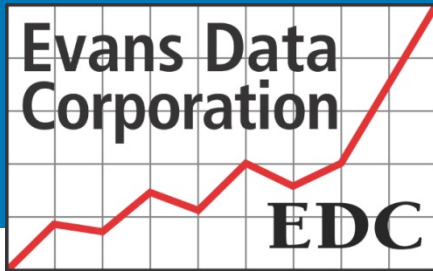
- The largest segments within a company using Eclipse is comprised of between 51 and 500 developers
- The percent who 'don't know' if Eclipse is being used in their company continues to decrease



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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	Valid Percent 2007
1-5	11.3	9.1	10.1
6-10	7.6	5.3	6.8
11-25	8.2	8.6	8.2
26-50	7.5	5.9	9.0
51-100	7.0	10.7	14.4
101-500	9.3	10.7	10.6
501-1,000	2.8	4.0	6.0
More than 1,000	4.0	24.9	9.3
Don't know	20.1	13.9	11.7
Not currently using Eclipse or Eclipse-based products	22.2	7.0	13.9

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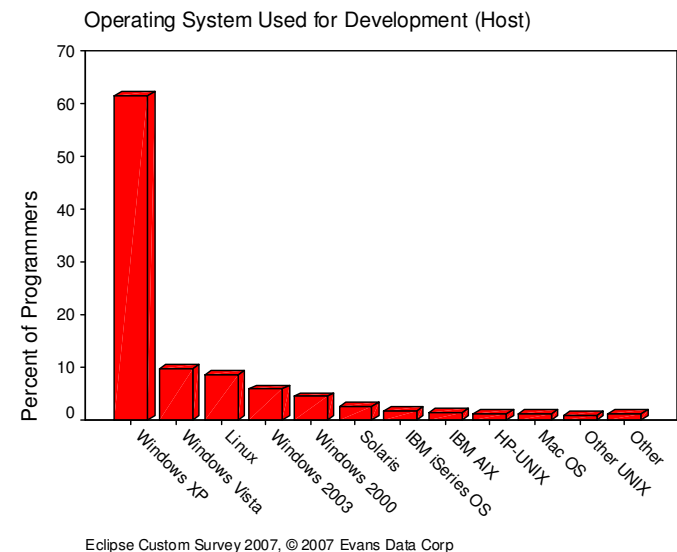


Development (Host) Operating System

- Windows XP continues to be the preferred host or development operating system (62%)
- The use of Vista has doubled since last year
- Linux use remains unchanged as primary host OS since the last report

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	Valid Percent 2007
Windows 2003	5.0	8.8	5.9
Windows XP	58.4	63.3	61.5
Windows 2000	20.7	7.4	4.5
Windows Vista	*	4.7	9.8
Windows Other	0.5	*	*
Linux	*	8.8	8.7
Redhat Linux	4.2	*	*
SuSe Linux	1.9	*	*
Other Linux	1.1	*	*
Solaris	2.1	1.6	2.5
IBM AIX	1.9	0.8	1.4
IBM iSeries OS	*	0.3	1.7
Other UNIX	0.8	0.3	0.8
HP-UNIX	0.5	0.8	1.1
Mac OS	1.6	2.2	1.1
Other	1.3	1.1	1.1

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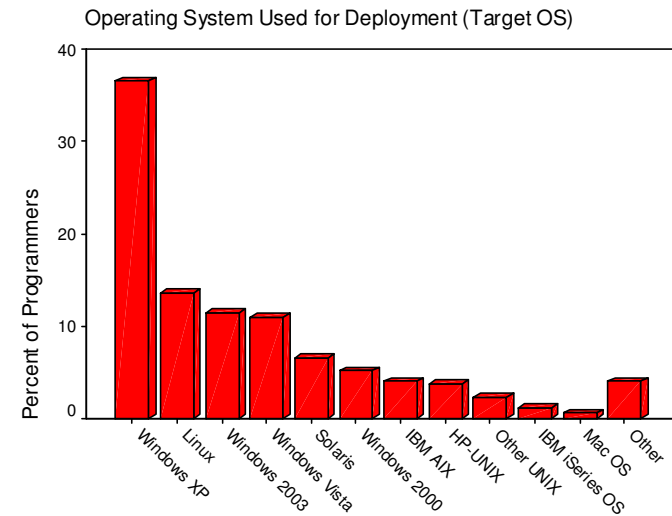


Deployment Operating System

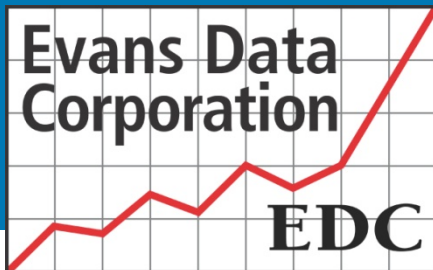
- Slightly more than a third of respondents (37%) deploy primarily to Windows XP, up from 24% a year ago
- Linux deployment remains at 14%, in line with 2005 numbers
- Deployment to Vista remains the same as it was a year ago

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	Valid Percent 2007
Windows XP	25.5	24.4	36.5
Windows 2000	15.4	5.4	5.2
Windows 2003	11.0	16.4	11.5
Windows Other	1.9	*	
Windows Vista	*	11.3	10.9
Solaris	11.8	6.5	6.6
IBM AIX	6.3	5.4	4.0
IBM iSeries OS	*	2.0	1.1
HP-UNIX	2.5	2.8	3.7
Other UNIX	1.4	1.1	2.3
Linux	*	19.8	13.5
Redhat Linux	8.8	*	*
Other Linux	3.0	*	*
SuSe Linux	2.7	*	*
Mac OS	*	1.1	0.6
Other	9.6	3.7	4.0

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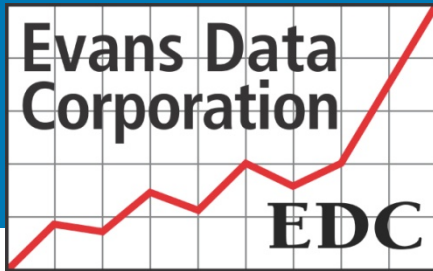
Type of Software Eclipse Used To Develop

- Development of server-centric applications is down slightly from past reports (48%)
- Nearly all types of software development are trending upward from 2005, although in slightly lower percentages than last year

What type of software are your Eclipse-based products being used to develop?	Percent of Cases 2005	Percent of Cases 2006	Percent of Cases 2007
Server-centric applications	54.9	65.1	48.3
Desktop client applications	26.6	44.1	29.5
Thin-client applications	24.5	33.5	25.0
Embedded software	9.1	22.7	17.7
Plug-ins for Eclipse	9.1	23.2	16.0
Rich client applications using Eclipse RCP	9.3	22.7	15.2
Mobile client applications	*	16.8	14.9
Applications built on Eclipse Equinox	*	*	8.4
Other	4.7	5.4	8.1
Not currently using Eclipse/Eclipse-based products	31.5	8.6	14.6
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Total Responses	169.9	242.2	197.8

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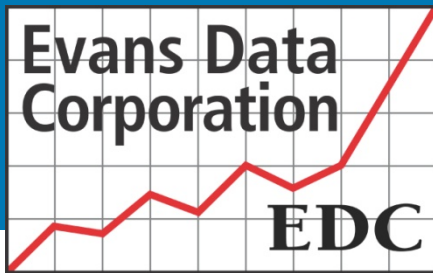


Usage Expectations for Eclipse RCP

- For 2007, the percent of respondents who predict an increase in use of Eclipse RCP still remain strong at 30% or greater (although slightly less than last year)
- The percent of respondents expecting to decrease their use of RCP remains low (2%)

How do you expect your use of the Eclipse Rich Client Platform to change over the next 6, 12, 24 months?	6 Months	12 Months	18 Months	24 Months
2006: Increase	44.2	44.5	37.8	37.5
2007: Increase	31.4	35.0	28.4	31.3
2006: Stay the same	23.6	26	22.2	19.5
2007: Stay the same	40.0	34.7	27.1	19.3
2006: Decrease	2.3	1.4	3.3	2.1
2007: Decrease	2.0	5.3	6.4	3.0
2006: Will not use	13.1	8.7	8.7	7.2
2007: Will not use	13.4	9.8	9.5	11.6
2006: Don't know	16.8	19.4	27.9	33.6
2007: Don't know	13.1	15.1	28.7	34.8

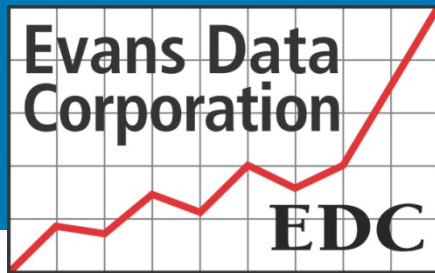
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Current and Planned Eclipse Projects

- The types of projects developers work remains consistent with last year
- Java Development Tools (JDT) lead in terms of Eclipse projects (48%)
- Respondents are focused on fewer projects overall (4.4 per developer, compared to 5.3 last year)
- This drop in focus is reflected across other types of projects, like CDT and EMF
- Meanwhile, WTP remains the same and VE has picked up a gain from 20% to 27%

What Eclipse projects do you use or plan to use in the next 12 months?	Percent of Cases 2006	Percent of Cases 2007
Java Development Tools (JDT)	57.5	47.7
C/C++ IDE (CDT)	47.3	34.4
Web Tools Project (WTP)	29	30.7
Visual Editor (VE)	20.4	26.6
Eclipse Modeling Framework (EMF)	36.5	24.1
Eclipse Rich Client Platform (RCP)	29.6	20.4
Eclipse Communication Framework (ECF)	20.1	19.8
Test & Performance Tools Platform (TPTP)	20.1	19.5
Eclipse Process Framework (EPF)	21.3	18.0
PHP IDE Project	14.7	17.3
Business Intelligence and Reporting Tools (BIRT)	22.2	17.0
Graphical Editor Framework (GEF)	21.6	16.1
Mobile Tools for Java	17.7	16.1
SOA Tools Platform	14.7	14.2
Data Tools Platform (DTP)	24.3	13.9
UML2	23.7	13.3
Aspect J Development Tools (AJDT)	18.9	9.9
Device Software Development Platform (DSDP)	12.3	9.9
Graphical Modeling Framework (GMF)	19.2	9.9
Equinox	6.9	9.6
Embedded RCP	10.5	8.4
Voice Tool Project	4.5	8.4
Mylar	4.8	5.6
Corona	8.1	5.3
TPTP Tracing and Profiling	*	5.0
Parallel Tools Platform	5.4	4.0
Dali EJB OR Mapping Project	10.2	3.4
Photran	*	3.4
Higgins Trust Framework	6.6	3.1
ALF	4.8	*
	-----	-----
Total Responses	532.3	435
50 missing cases; 334 valid cases		
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NOTE: In 2006 report, "PHP Development Tools" was listed as "PHP IDE Project"		

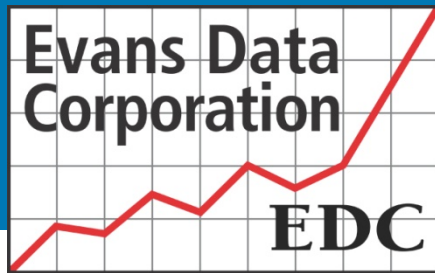


Barriers to Using Eclipse Trend

- As in 2005, lack of expertise is clearly the greatest barrier to Eclipse usage
- Concern about Open Source licensing has emerged as significant barrier

Please rank the following considerations with regard to barriers to Eclipse (Open Source) adoption within your organization.	Relative Ranking 2005	Relative Ranking 2006	Relative Ranking 2007
Lack of expertise in using Eclipse	327.8	304.8	347.0
Lack of training for Eclipse	315.4	311.8	328.5
Concerns about Open Source licenses	298.6	303.3	325.9
Lack of support for Eclipse plug-ins	300.2	261.9	325.7
Concerns about using Open Source software	291.5	311.4	325.2
Lack of training for Eclipse plug-ins	295.5	260.4	310.6
Lack of stable Eclipse plug-ins	*	*	305.9
Lack of support for Eclipse	310.4	281.2	304.0
Lack of certification for Eclipse plug-ins	270.3	239.2	295.1
Performance limitations of Eclipse	*	*	294.6
Technical limitations of Eclipse	296.4	254.5	294.1
Not interested in changing development tools	*	*	282.7
New releases of Eclipse platform too frequently	*	239.2	273.6
Other	227.6	267.9	263.4

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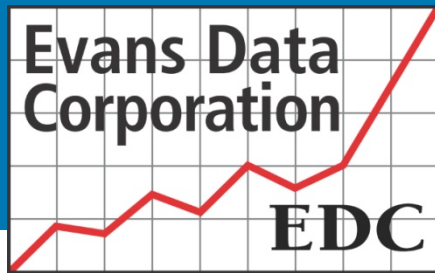


About Evans Data Corp.

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.

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Thank you

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