2009 IT Purchasing Survey for SearchCIO.com and SearchCIO-Midmarket.com

February 06, 2009

1. The size of my company or division is:

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Item	Count	Percent %
100-499 people	99	22.30%
Fewer than 100 people	97	21.85%
500-999 people	58	13.06%
1,000-2,499 people	48	10.81%
50,000+ people	39	8.78%
10,000-24,999 people	33	7.43%
5,000-9,999 people	28	6.31%
2,500-4,999 people	27	6.08%
25,000-49,999 people	15	3.38%

Total responses to this question: 444

2. What is the annual revenue of your company or division?

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Item	Count	Percent %
Less than $50 million	87	90.63%
More than $50 million	9	9.38%

Total responses to this question: 96

3. Please select one of the following:

>

Item	Count	Percent %
I have purchasing authority for some or all of my organization's IT purchases.	194	59.51%
I do not have purchasing authority, but I am familiar with some or all of my IT organization's budget requests and projects.	92	28.22%
None of the above.	40	12.27%

Total responses to this question: 326

4. What does your 2009 budget (operating and capital) look like?

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Item	Count	Percent %
Less than the 2008 budget.	105	38.18%
About the same as the 2008 budget.	91	33.09%
Up to 5% higher than the 2008 budget.	46	16.73%
More than 5% higher than the 2008 budget.	33	12.00%

Total responses to this question: 275

5. Do you have purchasing authority or knowledge of the purchasing plans/budget for your organization's enterprise applications?

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Item	Count	Percent %
Yes	222	81.92%
No	49	18.08%

Total responses to this question: 271

6. How will your 2009 investments in software for the business compare with 2008?

>

Item	Count	Percent %
Remain the same	69	31.80%
Decrease	63	29.03%
Increase more than 10%	32	14.75%
Increase less than 5%	26	11.98%
Increase 5% to 10%	25	11.52%
Don't know	2	0.92%

Total responses to this question: 217

7. How will your 2009 budget for enterprise applications change as a percentage of your total IT budget?

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Item	Count	Percent %
Remain the same	80	37.38%
Increase	74	34.58%
Decrease	59	27.57%
Don't know	1	0.47%

Total responses to this question: 214

8. What is your role related to making enterprise application purchases? Choose all that apply.

>

Item	Count	Percent %
Evaluate products or vendors	160	76.56%
Recommend purchase	150	71.77%
Research technology options	149	71.29%
Assess needs for budgeting purposes	143	68.42%
Ensure that products support strategic plan/objectives	143	68.42%
Establish requirements	143	68.42%
Provide purchase approval/sign-off only	64	30.62%

Total responses to this question: 209

9. What kinds of internal business applications will you invest in for 2009 (including license fees for existing apps)?
Check all that apply.

>

Item	Count	Percent %
Business intelligence	103	50.00%
Collaboration	79	38.35%
Business process management	74	35.92%
Financial	73	35.44%
ERP	68	33.01%
Inbound CRM/call center	61	29.61%
Human resources	55	26.70%
Outbound CRM/sales automation	41	19.90%
Logistics	36	17.48%
Manufacturing (including supply chain)	29	14.08%
Clinical Systems	2	0.97%
Asset Management	1	0.49%
BCP	1	0.49%
clinical	1	0.49%
credit quality	1	0.49%
ECR	1	0.49%
Enterprise Management	1	0.49%
Enterprise Reporting	1	0.49%
ERP Upgrade	1	0.49%
healthcare	1	0.49%
identity management	1	0.49%
License Management	1	0.49%
licensing	1	0.49%
log management	1	0.49%
Maintenance Management System	1	0.49%
medical applications	1	0.49%
Membership/Claims Application Systems	1	0.49%
Micrsoft 2008 Server Cals	1	0.49%
none	1	0.49%
None - budget cut for new purchases	1	0.49%
Operations	1	0.49%
outsourcing	1	0.49%
Probably none	1	0.49%
security	1	0.49%
Software Asset Management	1	0.49%
time and attendance	1	0.49%
trading	1	0.49%
Utlity Billing	1	0.49%
various government functions	1	0.49%
VmWare	1	0.49%
Web interface	1	0.49%

Total responses to this question: 206

10. Which of the following vendors supply application software to your company? Check all that apply.

>

Item	Count	Percent %
Microsoft	170	83.33%
Oracle	102	50.00%
IBM (including Cognos, Telelogic)	89	43.63%
HP	84	41.18%
SAP	52	25.49%
CA	48	23.53%
Salesforce.com	29	14.22%
SAS	23	11.27%
Infor	21	10.29%
Information Builders	15	7.35%
IDS Scheer	9	4.41%
CDC Software	6	2.94%
DataFlux	6	2.94%
Lawson	2	0.98%
PeopleSoft	2	0.98%
Activant, Pathguide	1	0.49%
Adobe	1	0.49%
AirIT, Invensys, Accela, ESRI, AutoDesk	1	0.49%
Apple	1	0.49%
Autodesk, ESRI	1	0.49%
BMC	1	0.49%
compuware	1	0.49%
Constellation Builders	1	0.49%
Digium	1	0.49%
EM7	1	0.49%
Epicor	1	0.49%
EPiServer, Sonar6, Frontier, Harlosh	1	0.49%
far too many to list	1	0.49%
HARIS	1	0.49%
Hospitality specific	1	0.49%
Invensys (to be replaced in 2010)	1	0.49%
JDA, Red Prairie,	1	0.49%
Kronos, NGS	1	0.49%
manage engine	1	0.49%
many	1	0.49%
McKesson Provider Technologies	1	0.49%
Mincron Software	1	0.49%
multiple companies	1	0.49%
Novell, Jenzabar, Blackboard	1	0.49%
open source	1	0.49%
Proprietary	1	0.49%
QAD	1	0.49%
Qfiniti	1	0.49%
REbi	1	0.49%
Shelby Systems, Corel, Adobe	1	0.49%
Sun	1	0.49%
Sungard	1	0.49%
systran, basis technologies, etc	1	0.49%
Trizetto	1	0.49%
various	1	0.49%
WennSoft	1	0.49%

11. Of the following, which would you rate as being strategic software vendors to your company? Check all that apply.

>

Item	Count	Percent %
Microsoft	145	72.50%
Oracle	87	43.50%
IBM (including Cognos, Telelogic)	70	35.00%
HP	54	27.00%
SAP	43	21.50%
CA	20	10.00%
Salesforce.com	14	7.00%
Infor	13	6.50%
SAS	13	6.50%
Information Builders	12	6.00%
CDC Software	6	3.00%
IDS Scheer	6	3.00%
DataFlux	5	2.50%
Lawson	2	1.00%
acct software	1	0.50%
Activant,Pathguide	1	0.50%
Apple	1	0.50%
compuware	1	0.50%
Constellation Builders	1	0.50%
Digium	1	0.50%
Epicor	1	0.50%
Fiserv, Harland	1	0.50%
Harlosh	1	0.50%
HARRIS	1	0.50%
interwoven	1	0.50%
JDA	1	0.50%
McKesson	1	0.50%
McKesson Provider Technologies	1	0.50%
Meditech	1	0.50%
Mincron Software	1	0.50%
none	1	0.50%
Novell, Jenzabar, Blackboard	1	0.50%
Siemens, McKesson	1	0.50%
sophos, Altiris, Filemaker, FirstClass,Scholastic	1	0.50%
Sun	1	0.50%
Sungard	1	0.50%
Sungard HE	1	0.50%
symantec	1	0.50%
Trizetto, Cognizant	1	0.50%
various	1	0.50%
WennSoft	1	0.50%
Xytech,Signiant	1	0.50%

Total responses to this question: 200

12. Do you have purchasing authority or knowledge of the purchasing plans/budget for your organization's application development efforts?

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Item	Count	Percent %
Yes	177	72.24%
No	68	27.76%

Total responses to this question: 245

13. Which of the following will be strategic suppliers of application development tools and middleware to your company in 2009?

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Item	Count	Percent %
Microsoft	114	64.77%
Oracle	68	38.64%
IBM	62	35.23%
HP	36	20.45%
Red Hat	33	18.75%
Sun	32	18.18%
Compuware	10	5.68%
Software AG	9	5.11%
none	3	1.70%
?	1	0.57%
abdessmad	1	0.57%
ADP	1	0.57%
alladin	1	0.57%
Extol	1	0.57%
FileMaker	1	0.57%
Fiserv, Harland, Cisco	1	0.57%
Lawson	1	0.57%
many	1	0.57%
no new development	1	0.57%
non	1	0.57%
none, we're not an app development shop	1	0.57%
Open Source	1	0.57%
Perpetua by ArtistryMarketing	1	0.57%
progress	1	0.57%
survey too long	1	0.57%
TecSys	1	0.57%
Trizetto	1	0.57%
xerox	1	0.57%

Total responses to this question: 176

14. How will your use of the following ways to deliver applications to the business change in 2009?

Table 1 of 2	Item	Increase	Remain the same	Decrease	Don't use
#0	Purchasing packaged applications to use largely unchanged	14.9%	61.9%	18.5%	4.8%
#1	Customizing packaged applications	23.1%	46.7%	20.7%	8.3%
#2	Using Software as a Service	28.0%	31.5%	5.4%	31.5%
#3	Developing applications from scratch	22.6%	33.9%	25.6%	17.3%
#4	Using composite apps (such as mashups)	20.2%	32.1%	8.9%	31.0%

Table 2 of 2	Don't know	Total
#0		168
#1	1.2%	169
#2	3.6%	168
#3	0.6%	168
#4	7.7%	168

Total responses to this question: 169

15. How will your custom application development efforts change in 2009?

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Item	Count	Percent %
Remain the same	73	43.45%
Increase	49	29.17%
Decrease	29	17.26%
Don't do custom development	17	10.12%

Total responses to this question: 168

16. How will you handle the increased need for custom apps in 2009? Check all that apply.

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Item	Count	Percent %
Increase productivity of development group through tools or methodologies	30	61.22%
Increase development staff	18	36.73%
Increase use of on-site contractors	18	36.73%
Outsource development of new apps	10	20.41%
Outsource development of maintenance coding	6	12.24%

Total responses to this question: 49

17. Where are you outsourcing development to? Check all that apply.

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Item	Count	Percent %
Domestic	11	73.33%
International	8	53.33%

Total responses to this question: 15

18. What are your main criteria for selecting an outsourcing partner for development?

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Item	Count	Percent %
Capability	7	43.75%
Pricing	4	25.00%
Availability	3	18.75%
English proficiency	2	12.50%

Total responses to this question: 16

19. How will your use of service-oriented architecture (SOA) change in 2009?

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Item	Count	Percent %
Don't use	48	28.57%
Increase	45	26.79%
Remain the same	37	22.02%
Don't know	24	14.29%
Decrease	14	8.33%

Total responses to this question: 168

20. How would you describe your company's progress with SOA?

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Item	Count	Percent %
We're investigating SOA.	39	39.80%
We have a SOA project under way.	28	28.57%
We have multiple SOA projects.	19	19.39%
We are using SOA for most new projects.	9	9.18%
We have a SOA office or directorate.	3	3.06%

Total responses to this question: 98

21. What is your main objective for SOA?

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Item	Count	Percent %
Integrate legacy applications	32	32.99%
Implement business process management	26	26.80%
Provide better scaling of applications	22	22.68%
Reuse code	16	16.49%
gyu	1	1.03%

Total responses to this question: 97

22. How satisfied are you that your SOA project(s) are delivering or have delivered the desired benefits?

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Item	Count	Percent %
Satisfied	70	72.16%
Not very satisfied	14	14.43%
Very satisfied	12	12.37%
Dissatisfied	1	1.03%

Total responses to this question: 97

23. What are the major obstacles to achieving your desired results with SOA? Check all that apply.

>

Item	Count	Percent %
Agreeing on clear business requirements	54	55.67%
Competing technical standards	40	41.24%
Finding people with the right skills	38	39.18%
Lack of IT governance structure	38	39.18%
SOA tools are difficult to develop with	31	31.96%
Lack of runtime management tools	16	16.49%
Negative impact on application performance	11	11.34%
Sufficient budget for resources	1	1.03%
Time/resource constraints	1	1.03%
ytuyt	1	1.03%

Total responses to this question: 97

24. Have you deployed business process management (BPM) or plan to in 2009?

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Item	Count	Percent %
No	63	38.18%
Plan to deploy	41	24.85%
Already deployed	27	16.36%
Don't know	23	13.94%
Have already deployed and plan to deploy more	11	6.67%

Total responses to this question: 165

25. How far along are your BPM efforts?

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Item	Count	Percent %
Just starting	29	35.37%
Initial deployment	23	28.05%
Some projects under our belt	22	26.83%
Broad use	8	9.76%

Total responses to this question: 82

26. How satisfied are you with the results of your BPM efforts?

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Item	Count	Percent %
Satisfied	37	67.27%
Very satisfied	10	18.18%
Not very satisfied	5	9.09%
Dissatisfied	3	5.45%

Total responses to this question: 55

27. What are the major obstacles to achieving your desired results with BPM? Check all that apply.

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Item	Count	Percent %
Agreeing on clear business requirements	24	43.64%
Competing technical standards	23	41.82%
BPM tools are difficult to develop with	20	36.36%
Lack of IT governance structure	17	30.91%
Lack of runtime management tools	15	27.27%
Negative impact on application performance	12	21.82%
Finding people with the right skills	11	20.00%
Other	2	3.64%
funding	1	1.82%
jkljuıou	1	1.82%
Security/Performance Issues	1	1.82%

Total responses to this question: 55

28. Do you have purchasing authority or knowledge of the purchasing plans/budget for data center expenditures?

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Item	Count	Percent %
Yes	160	68.67%
No	73	31.33%

Total responses to this question: 233

29. How will your 2009 investments in servers and storage compare with 2008?

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Item	Count	Percent %
Decrease	42	26.25%
Remain the same	41	25.63%
Increase more than 10%	34	21.25%
Increase 5% to 10%	28	17.50%
Increase less than 5%	15	9.38%

Total responses to this question: 160

30. How will your 2009 budget for servers and storage change as a percentage of your total IT budget?

>

Item	Count	Percent %
Increase	63	39.38%
Remain the same	51	31.88%
Decrease	46	28.75%

Total responses to this question: 160

31. What is your main role related to making server and storage infrastructure purchases? Choose all that apply.

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Item	Count	Percent %
Establish requirements	115	73.72%
Recommend purchase	112	71.79%
Research technology options	110	70.51%
Evaluate products or vendors	106	67.95%
Assess needs for budgeting purposes	102	65.38%
Ensure that products support strategic plan/objectives	102	65.38%
Provide purchase approval/sign-off only	57	36.54%

Total responses to this question: 156

32. What are the three main factors driving your 2009 spending for servers and storage?

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Item	Count	Percent %
Modernizing to enable efficiency/performance/support of latest applications	72	47.06%
Implementing disaster recovery (DR) plan	53	34.64%
Building a new data center/expanding an existing data center	46	30.07%
Equipment leases at end of life	45	29.41%
Consolidating data center footprint	42	27.45%
Increasing number of applications	41	26.80%
Increasing number of users	38	24.84%
Major initiatives to further automate internal processes	32	20.92%
Reducing energy costs	16	10.46%
Implementing compliance plan	13	8.50%
Mergers and acquisitions	11	7.19%
Major initiatives to further computerize customer interactions	9	5.88%
25435l	1	0.65%
already completed virtualization & DR in 2008	1	0.65%
don't know	1	0.65%
Increased demand for storage	1	0.65%
Virtualization	1	0.65%

Total responses to this question: 153

33. Which of the following types of server and storage-related purchases do you plan to make in 2009? Please choose all that apply.

>

Item	Count	Percent %
Storage-related purchases (SAN, NAS, backup)	83	55.33%
Server virtualization software	79	52.67%
Rack servers	75	50.00%
Blade servers	71	47.33%
Systems management software	41	27.33%
Cooling systems	27	18.00%
ITIL-related software	26	17.33%
Large, standalone multiprocessor servers (more than 8 CPUs)	23	15.33%
Mainframe(s)	15	10.00%
Project and portfolio management software	13	8.67%
None	11	7.33%
789asdfghjkl i,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,.....çömnbvcxzx	1	0.67%
IDS/IPS	1	0.67%

Total responses to this question: 150

34. How would you describe your efforts in server virtualization?

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Item	Count	Percent %
Limited deployment	24	30.38%
Significant production deployment	24	30.38%
Most production servers virtualized	16	20.25%
No deployment yet	15	18.99%

Total responses to this question: 79

35. At what stage do you expect your server virtualization efforts to be 12 months from now?

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Item	Count	Percent %
Most production servers virtualized	29	36.71%
Significant production deployment	27	34.18%
Limited deployment	23	29.11%

Total responses to this question: 79

36. Which virtualization platforms do you have or intend to have in production? Check all that apply.

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Item	Count	Percent %
VMware ESX	58	75.32%
Microsoft Hyper-V	26	33.77%
VMware Server (free version)	23	29.87%
XenServer	11	14.29%
Paralells Server	1	1.30%
Virtual Iron	1	1.30%

Total responses to this question: 77

37. What are the two most important goals of your virtualization effort in 2009?

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Item	Count	Percent %
Server consolidation	56	70.89%
Better DR	33	41.77%
Cost containment	28	35.44%
Faster server provisioning	19	24.05%
Better performance through dynamic provisioning	17	21.52%
Legacy application preservation	3	3.80%

Total responses to this question: 79

38. What are the two main obstacles you are encountering in deploying server virtualization?

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Item	Count	Percent %
Cost of new servers	31	39.24%
Production applications that are not suitable for virtualizing	31	39.24%
Cost of software	27	34.18%
Lack of skilled staff	23	29.11%
Integration with storage	18	22.78%
Lack of management tools	12	15.19%
Poor performance	6	7.59%
Buggy software	3	3.80%

Total responses to this question: 79

39. What are your plans for desktop virtualization in 2009?

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Item	Count	Percent %
No plans	54	39.13%
Evaluation	42	30.43%
Limited deployment	22	15.94%
Significant production deployment	10	7.25%
Majority of desktops will be virtualized	6	4.35%
Don't know	4	2.90%

Total responses to this question: 138

40. What is the main driver of your desktop virtualization efforts? Choose only one.

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Item	Count	Percent %
Accommodate guests and roaming workers	1	50.00%
Simplify software distribution	1	50.00%

Total responses to this question: 2

41. Describe your plans for the following desktop virtualization tools in 2009:

Item	None	Evaluating	Deploying	Already deployed	Total
Citrix XenApp	46.2%	30.8%	10.3%	12.8%	39
Citrix XenDesktop	36.6%	41.5%	12.2%	9.8%	41
Microsoft VDI	56.8%	29.7%	8.1%	5.4%	37
Microsoft Virtual PC	50.0%	32.5%	12.5%	5.0%	40
VMware ACE	33.3%	38.5%	15.4%	12.8%	39
VMware VDI	25.0%	47.5%	12.5%	15.0%	40
Other	78.4%	13.5%	2.7%	5.4%	37

Total responses to this question: 42

42. What are your plans for using managed data center services in 2009? Check all that apply.

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Item	Count	Percent %
None	91	61.90%
Using colocation facility	31	21.09%
Using Web hosting	22	14.97%
Employing system, network or storage management services	18	12.24%
Employing Software as a Service applications	12	8.16%
Using cloud storage capacity	12	8.16%
Using cloud server capacity	11	7.48%

Total responses to this question: 147

43. What workloads and/or data will you place with external cloud providers? Check all that apply.

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Item	Count	Percent %
Noncritical business applications	27	48.21%
Critical business applications	23	41.07%
Development/testing	20	35.71%
None	2	3.57%
abdessapmad	1	1.79%
External web site	1	1.79%
Non personal data	1	1.79%
o	1	1.79%
online backup	1	1.79%
Replication for DR/BC	1	1.79%
workstation backups	1	1.79%

Total responses to this question: 56

44. What is your main criterion when choosing managed service providers? Choose only one answer.

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Item	Count	Percent %
Reliability	24	42.11%
Cost	17	29.82%
Capability	8	14.04%
Reputation	5	8.77%
Support	2	3.51%
Location	1	1.75%

Total responses to this question: 57

45. Of the following, which are your standard data center hardware vendors? Check all you have standardized on.

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Item	Count	Percent %
Cisco	132	61.40%
HP	122	56.74%
Dell	95	44.19%
IBM	80	37.21%
EMC	59	27.44%
APC	51	23.72%
Sun	47	21.86%
Liebert	37	17.21%
NetApp	31	14.42%
F5 Networks	28	13.02%
None	15	6.98%
Foundry Networks	8	3.72%
HDS	4	1.86%
Apple	1	0.47%
Barracuda	1	0.47%
don't know	1	0.47%
Enterasys	1	0.47%
Equal Logic	1	0.47%
Intel, Apple, Extreme Networks	1	0.47%
naruto	1	0.47%
no standards	1	0.47%
Powerware, Juniper	1	0.47%
riverbed	1	0.47%
Savvis	1	0.47%
ujk	1	0.47%
white box	1	0.47%
wipro	1	0.47%

Total responses to this question: 215

46. Of the following, which are your standard data center management software vendors? Check all you have standardized on.

>

Item	Count	Percent %
Microsoft	119	55.87%
VMware	73	34.27%
HP	72	33.80%
IBM	60	28.17%
Citrix	53	24.88%
Symantec	52	24.41%
EMC	38	17.84%
Red Hat	38	17.84%
Open source	31	14.55%
Novell	28	13.15%
None	24	11.27%
BMC	20	9.39%
CA	18	8.45%
Apple	2	0.94%
Don't Know	2	0.94%
Sun	2	0.94%
?	1	0.47%
Ipswitch	1	0.47%
KACE	1	0.47%
LanDesk	1	0.47%
Sunbelt Software	1	0.47%
Sybase	1	0.47%
What's UP	1	0.47%
wipro	1	0.47%

Total responses to this question: 213

47. How would you compare your 2009 operations budget for data center infrastructure (cabling, cooling, power, etc.) with your 2008 budget?

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Item	Count	Percent %
Remaining the same	73	34.76%
Decreasing	58	27.62%
Increasing 6% to 10%	23	10.95%
Increasing 1% to 5%	21	10.00%
Increasing more than 10%	20	9.52%
Don't know	15	7.14%

Total responses to this question: 210

48. How will your 2009 budget for data center infrastructure change as a percentage of your total IT budget?

>

Item	Count	Percent %
Stay the same	89	42.38%
Decrease	71	33.81%
Increase	50	23.81%

Total responses to this question: 210

49. What is your main role related to making data center infrastructure purchases? Choose all that apply.

>

Item	Count	Percent %
Establish requirements	119	57.49%
Ensure that products support strategic plan/objectives	115	55.56%
Research technology options	114	55.07%
Recommend purchase	108	52.17%
Evaluate products or vendors	106	51.21%
Assess needs for budgeting purposes	103	49.76%
Provide purchase approval/sign-off only	48	23.19%

Total responses to this question: 207

50. What are the three main factors driving your 2009 spending for data center infrastructure (facilities, racks, cables, cooling, power, etc.)?

>

Item	Count	Percent %
Increasing number of applications	83	41.29%
Implementing DR plan	79	39.30%
Consolidating data center footprint	77	38.31%
Major initiatives to further automate internal processes	61	30.35%
Increasing number of users	59	29.35%
Reducing energy costs	51	25.37%
Implementing compliance plan	47	23.38%
Major initiatives to further computerize customer interactions	25	12.44%
Mergers and acquisitions	19	9.45%
none	2	1.00%
buildingnew data center	1	0.50%
don't know	1	0.50%
done in 2008	1	0.50%
general systemic improvement	1	0.50%
lower cost of operation	1	0.50%
no needs due to downsizing	1	0.50%
NO UPGRADES PLANNED	1	0.50%
reduce costs due to economy	1	0.50%
Remote operations	1	0.50%
replacing old equipment	1	0.50%
replacing old equipment, optomizing	1	0.50%

Total responses to this question: 201

51. Is the cost of electricity allocated to the IT budget?

>

Item	Count	Percent %
No	128	62.44%
Don't know	40	19.51%
Yes	37	18.05%

Total responses to this question: 205

52. How important is improving energy efficiency to your data center strategy?

>

Item	Count	Percent %
Important	103	50.24%
Not important	54	26.34%
Very important	36	17.56%
Critical	12	5.85%

Total responses to this question: 205

53. What actions are you taking in 2009 to improve data center energy efficiency? Choose all that apply.

>

Item	Count	Percent %
Consolidating servers and/or storage	111	74.50%
Buying energy-efficient servers and/or storage	86	57.72%
Upgrading physical infrastructure	60	40.27%
Improving cooling efficiency	56	37.58%
Re-balancing workloads among data centers	31	20.81%

Total responses to this question: 149

54. How will your spending on DR change in 2009?

>

Item	Count	Percent %
Remain the same	91	44.39%
Increase	66	32.20%
Decrease	29	14.15%
No spending	19	9.27%

Total responses to this question: 205

55. Which of the following will you include in your DR plan in 2009? Check all that apply.

>

Item	Count	Percent %
Disk-based backup	92	50.00%
Virtual machine restore	85	46.20%
Paired data centers (hot site/cold site, mirror sites, hot site/hot site, etc.)	71	38.59%
Tape backup	67	36.41%
Advanced backup (continuous data protection, single-instance storage, etc.)	66	35.87%
DR service provider	52	28.26%
WAN optimization/acceleration	39	21.20%
developing plans	1	0.54%
don't know	1	0.54%
management	1	0.54%
naruto abdessamad chafil	1	0.54%
no idea	1	0.54%
redundant power supplies	1	0.54%

Total responses to this question: 184

56. Do you have purchasing authority or knowledge of the purchasing plans/budget for networking/telecom products?

>

Item	Count	Percent %
Yes	111	54.41%
No	93	45.59%

Total responses to this question: 204

57. How will your 2009 investments in networking compare with those in 2008?

>

Item	Count	Percent %
Remain the same	37	33.64%
Decrease	30	27.27%
Increase less than 5%	17	15.45%
Increase 5% to 10%	16	14.55%
Increase more than 10%	10	9.09%

Total responses to this question: 110

58. How will your 2009 budget for networking change as a percentage of your total IT budget?

>

Item	Count	Percent %
Remain the same	44	40.00%
Increase	37	33.64%
Decrease	29	26.36%

Total responses to this question: 110

59. What is your main role related to making networking purchases? Choose all that apply.

>

Item	Count	Percent %
Establish requirements	80	72.73%
Recommend purchase	78	70.91%
Ensure that products support strategic plan/objectives	77	70.00%
Research technology options	75	68.18%
Evaluate products or vendors	74	67.27%
Assess needs for budgeting purposes	69	62.73%
Provide purchase approval/sign-off only	43	39.09%

Total responses to this question: 110

60. Which of the following networking/telecom purchases do you plan to make in 2009? Please choose all that apply.

>

Item	Count	Percent %
Wireless LAN access points	45	41.28%
Core routers	41	37.61%
Voice over IP	41	37.61%
Higher-capacity lines from carrier	40	36.70%
Edge routers	32	29.36%
Network management software	30	27.52%
WAN accelerators/optimizers	30	27.52%
Video conferencing	26	23.85%
10G Ethernet switches	25	22.94%
Unified messaging	24	22.02%
Network management services	23	21.10%
None	14	12.84%
PBX	12	11.01%
abdessamad naruto chafil	1	0.92%

Total responses to this question: 109

61. What is the main factor driving your data network hardware purchases? Choose only one.

>

Item	Count	Percent %
Need more bandwidth	25	23.15%
Improve connectivity of remote offices	19	17.59%
Need better network security	18	16.67%
Need to create converged data/telecom/video network	14	12.96%
DR, consolidation require better WAN connections	11	10.19%
Virtualization creating denser I/O servers	8	7.41%
Site expansion (new building or buildings)	7	6.48%
Need more ports	5	4.63%
Need to deliver multimedia	1	0.93%

Total responses to this question: 108

62. Do you have purchasing authority or knowledge of the purchase plans/budget for IT security products?

>

Item	Count	Percent %
Yes	127	63.18%
No	74	36.82%

Total responses to this question: 201

63. How will your 2009 investments in information security compare with 2008?

>

Item	Count	Percent %
Remain the same	45	35.43%
Increase 5% to 10%	23	18.11%
Decrease	22	17.32%
Increase less than 5%	20	15.75%
Increase more than 10%	17	13.39%

Total responses to this question: 127

64. How will your 2009 budget for information security change as a percentage of your total IT budget?

>

Item	Count	Percent %
Increase	55	43.31%
Remain the same	47	37.01%
Decrease	25	19.69%

Total responses to this question: 127

65. What is your main role related to making information security purchases? Choose all that apply.

>

Item	Count	Percent %
Establish requirements	90	70.87%
Research technology options	89	70.08%
Ensure that products support strategic plan/objectives	86	67.72%
Evaluate products or vendors	86	67.72%
Recommend purchase	85	66.93%
Assess needs for budgeting purposes	78	61.42%
Provide purchase approval/sign-off only	52	40.94%

Total responses to this question: 127

66. Which of the following security purchases do you plan to make in 2009? Please choose all that apply.

>

Item	Count	Percent %
Threat management (antivirus, antispyware, anitspam, patch management, unified threat management)	68	53.54%
Data protection (data leakage, database access control, encryption)	60	47.24%
Endpoint security (with or without agents)	57	44.88%
Vulnerability assessments	55	43.31%
Perimeter security (firewalls, intrusion detection or prevention)	53	41.73%
Network access control (NAC or NAP)	48	37.80%
Network security (inside the firewall)	47	37.01%
Identity and access management (authentication, authorization, password management)	42	33.07%
Security event/information management (SEM/SIM, log management, correlation tools)	39	30.71%
Managed services	20	15.75%
None	16	12.60%
abdessama a b d 123	1	0.79%
based on on-going assessment	1	0.79%
risk management	1	0.79%
Risk management, GRC	1	0.79%

Total responses to this question: 127

67. What are the two main factors driving your security spending in 2009?

>

Item	Count	Percent %
Preventing data theft from outside	52	40.94%
Preventing data theft from inside	32	25.20%
Create more uniform and automated security policy and enforcement	31	24.41%
HIPAA compliance	24	18.90%
Improve identity and access management	24	18.90%
Other regulatory compliance	19	14.96%
PCI compliance	12	9.45%
SOX compliance	12	9.45%
Data privacy laws	9	7.09%
Graham-Leach-Bliley compliance	3	2.36%
Converging business & IT Security	1	0.79%
economy	1	0.79%
FERPA	1	0.79%
n/a	1	0.79%
no changes	1	0.79%
None	1	0.79%
nothing	1	0.79%
nothing applies	1	0.79%
risk management	1	0.79%
SB 1386 compliance	1	0.79%

Total responses to this question: 127

68. From which three IT security vendors do you expect to make the most strategic purchases in 2009?

68a. 1.

Item	Count	Percentage
Cisco	17	13.49%
symantec	16	12.70%
IBM	6	4.76%
Mcafee	5	3.97%
Microsoft	5	3.97%
Juniper	4	3.17%
None	4	3.17%
Sophos	4	3.17%
CA	3	2.38%
?	2	1.59%
Bluecoat	2	1.59%
Checkpoint	2	1.59%
DEll	2	1.59%
HP	2	1.59%
RSA	2	1.59%
Sourcefire	2	1.59%
WebSense	2	1.59%
Astaro	1	0.79%
Aventail	1	0.79%
Barracuda	1	0.79%
do not know	1	0.79%
Do not know currently	1	0.79%
don't have	1	0.79%
don't know	1	0.79%
dont	1	0.79%
EMC	1	0.79%
Force Field Wireless	1	0.79%
Foundry Networks	1	0.79%
Global Scape	1	0.79%
i	1	0.79%
Ironkey	1	0.79%
Juniper Networks	1	0.79%
Kaspersky	1	0.79%
Macafee	1	0.79%
Mcaffe	1	0.79%
MIEL	1	0.79%
N/A	1	0.79%
NA	1	0.79%
naruto123	1	0.79%
NetScout	1	0.79%
Nguard	1	0.79%
Not Decided	1	0.79%
not sure	1	0.79%
not sure yet	1	0.79%
not yet determined	1	0.79%
novell	1	0.79%
Oracle	1	0.79%
PointSec	1	0.79%
Proofpoint	1	0.79%
Qualys	1	0.79%
sematic	1	0.79%
Sonic	1	0.79%

Item	Count	Percentage
SonicWall	1	0.79%
Splunk	1	0.79%
Symantic	1	0.79%
TBD	1	0.79%
Trend	1	0.79%
Trend Micro	1	0.79%
Trend Miro	1	0.79%
unknown	1	0.79%
virus	1	0.79%
Watchguard	1	0.79%
White Hat	1	0.79%

68b. 2.

Item	Count	Percentage
Cisco	9	9.00%
Microsoft	9	9.00%
symantec	9	9.00%
IBM	7	7.00%
CA	5	5.00%
Mcafee	5	5.00%
DEll	3	3.00%
Oracle	3	3.00%
Checkpoint	2	2.00%
N/A	2	2.00%
Sophos	2	2.00%
Sun	2	2.00%
Trend Micro	2	2.00%
3Com	1	1.00%
?	1	1.00%
arcsight	1	1.00%
Astaro	1	1.00%
Check Point	1	1.00%
Citrix	1	1.00%
Datacraft	1	1.00%
don't	1	1.00%
don't have	1	1.00%
EMC	1	1.00%
ESET	1	1.00%
HP	1	1.00%
identified	1	1.00%
IronMail	1	1.00%
iss	1	1.00%
jumiper	1	1.00%
Juniper	1	1.00%
know	1	1.00%
LogRythym	1	1.00%
Macafee	1	1.00%
Meru	1	1.00%
narut0123	1	1.00%
None	1	1.00%
Not Decided	1	1.00%
novell	1	1.00%
Opensource	1	1.00%
Panda	1	1.00%

Item	Count	Percentage
PCI	1	1.00%
PGP	1	1.00%
PointSec	1	1.00%
Qualys	1	1.00%
Sopho	1	1.00%
spam	1	1.00%
SYMANTATIC	1	1.00%
TBD	1	1.00%
TriGeo	1	1.00%
unknown	1	1.00%
Webroot	1	1.00%
XPL	1	1.00%
Zix	1	1.00%

68c. 3.

Item	Count	Percentage
Cisco	9	12.50%
Microsoft	7	9.72%
IBM	4	5.56%
HP	3	4.17%
EMC	2	2.78%
Juniper	2	2.78%
Mcafee	2	2.78%
MessageLabs	2	2.78%
N/A	2	2.78%
unknown	2	2.78%
3Com	1	1.39%
?	1	1.39%
Archer	1	1.39%
CA	1	1.39%
Check Point	1	1.39%
Checkpoint	1	1.39%
Citrix	1	1.39%
cooki	1	1.39%
DEll	1	1.39%
don't have	1	1.39%
Entrust	1	1.39%
ESET	1	1.39%
F5	1	1.39%
Guardian Edge	1	1.39%
ironport	1	1.39%
know	1	1.39%
mcafree	1	1.39%
naruto123	1	1.39%
None	1	1.39%
Nortel	1	1.39%
Not Decided	1	1.39%
Paledion	1	1.39%
RedSpin	1	1.39%
relsec	1	1.39%
RSA	1	1.39%
SafeNet Inc	1	1.39%
Serena	1	1.39%
Sun	1	1.39%

Item	Count	Percentage
Sun Microsystems	1	1.39%
Sunbelt Software	1	1.39%
symantec	1	1.39%
TBD	1	1.39%
Trend Micro	1	1.39%
WebSense	1	1.39%
who	1	1.39%
yet	1	1.39%
Zone Alarm	1	1.39%

Total responses to this question:

69. Do you have purchasing authority or knowledge of the purchase plans/budget for compliance-related purchases in 2009?

>

Item	Count	Percent %
No	111	55.50%
Yes	89	44.50%

Total responses to this question: 200

70. How will your 2009 investments in compliance-related hardware, software and IT services compare with 2008?

>

Item	Count	Percent %
Remain the same	39	43.82%
Decrease	14	15.73%
Increase 5% to 10%	12	13.48%
Increase less than 5%	12	13.48%
Increase more than 10%	12	13.48%

Total responses to this question: 89

71. How will your 2009 budget for compliance-related hardware, software and IT services change as a percentage of your total IT budget?

>

Item	Count	Percent %
Remain the same	42	47.19%
Increase	33	37.08%
Decrease	14	15.73%

Total responses to this question: 89

72. What is your main role related to making compliance purchases? Choose all that apply.

>

Item	Count	Percent %
Ensure that products support strategic plan/objectives	61	68.54%
Assess needs for budgeting purposes	60	67.42%
Establish requirements	60	67.42%
Evaluate products or vendors	59	66.29%
Recommend purchase	58	65.17%
Research technology options	58	65.17%
Provide purchase approval/sign-off only	33	37.08%

Total responses to this question: 89

73. Which requirement is the primary driver for these compliance-related projects or purchases in 2009? Please choose only one answer.

>

Item	Count	Percent %
Legislation specific to your industry	24	26.97%
Health Insurance Portability and Accountability Act	16	17.98%
Litigation discovery requests or safeguards (e-discovery)	14	15.73%
Sarbanes-Oxley Act	14	15.73%
Don't know	7	7.87%
Gramm-Leach-Bliley Act	4	4.49%
All of the above	1	1.12%
Alll of the above	1	1.12%
client dependent	1	1.12%
FERPA	1	1.12%
Intenal policy compliance	1	1.12%
Internal Audit	1	1.12%
n/a	1	1.12%
not a major issue for us	1	1.12%
Privacy	1	1.12%
Weren't a private company, so no real driver	1	1.12%

Total responses to this question: 89

74. What purchases will be associated with your compliance efforts in 2009? Please choose all that apply.

>

Item	Count	Percent %
Backup or recovery devices/services	45	50.56%
Data protection/security tools	39	43.82%
Archiving software or services	34	38.20%
Log management	31	34.83%
Content management software	27	30.34%
Governance/risk management software	23	25.84%
Records management software	18	20.22%
Managed services	15	16.85%
Services or software related exclusively to Sarbanes-Oxley compliance	12	13.48%
None	9	10.11%
abdessad chafil 3/6	1	1.12%
not sure yet	1	1.12%

Total responses to this question: 89

75. Which infrastructure upgrades will be associated with your compliance efforts in 2009? Please choose all that apply.

>

Item	Count	Percent %
Security upgrades	56	62.92%
Backup systems	46	51.69%
Archive systems	41	46.07%
WAN upgrades	20	22.47%
None	3	3.37%
n/a	2	2.25%
naruto	1	1.12%
operational	1	1.12%
unknown	1	1.12%

Total responses to this question: 89

76. What impact has virtualization had on your compliance efforts?

>

Item	Count	Percent %
No impact	38	42.70%
We don't use virtualization	18	20.22%
Made it easier	15	16.85%
Don't know	14	15.73%
Made it harder	4	4.49%

Total responses to this question: 89

77. Of the following areas, in which would your organization's CIO or top IT executive be heavily involved in purchasing? Please choose all that apply.

>

Item	Count	Percent %
Data center purchases	111	55.78%
Enterprise applications	103	51.76%
Disaster recovery/business continuity tools	99	49.75%
IT security purchases	92	46.23%
Business intelligence tools	90	45.23%
Virtualization	90	45.23%
Networking purchases	84	42.21%
Application Development	77	38.69%
Compliance-related purchases	69	34.67%
Managed Services	67	33.67%
Collaboration/Web 2.0 purchases	63	31.66%
SOA tools	43	21.61%
None of the above	20	10.05%

Total responses to this question: 199

78. What industry is your organization in?

>

Item	Count	Percent %
High-tech (software, hardware or services)	34	17.09%
Noncomputer manufacturing	30	15.08%
Financial services	24	12.06%
Government	22	11.06%
Medical/health care	17	8.54%
Education	14	7.04%
Business services	13	6.53%
Retail	9	4.52%
Nonprofit	6	3.02%
Construction	3	1.51%
Distribution	2	1.01%
Insurance	2	1.01%
Utility	2	1.01%
Wholesale Distribution	2	1.01%
Architectural/Engineering	1	0.50%
Aviation	1	0.50%
Call Center	1	0.50%
Civil Aerospace	1	0.50%
Consulting/Training	1	0.50%
Customer Care Solutions	1	0.50%
defence	1	0.50%
Freight Transportation	1	0.50%
Life Sciences	1	0.50%
Logistics	1	0.50%
Media And Entertainment	1	0.50%
Mining	1	0.50%
Natural Resources	1	0.50%
Property Management	1	0.50%
Real Estate	1	0.50%
Semiconductor	1	0.50%
telecommunications	1	0.50%
transportation	1	0.50%
Wholesaler	1	0.50%

Total responses to this question: 199

79. Which of the following titles best describes your role?

>

Item	Count	Percent %
Director of IS/MIS/IT	30	15.15%
IT management (manager IS/IT)	29	14.65%
CIO/CTO	25	12.63%
IT staff	17	8.59%
EVP/SVP/VP of IS/MIS/IT	11	5.56%
Project management	9	4.55%
Senior corporate (non-IT) management	9	4.55%
Architect	8	4.04%
Network management/administration	8	4.04%
Director of business applications	7	3.54%
Security management/administration	7	3.54%
Educator	6	3.03%
Systems management/administration	6	3.03%
Corporate (non-IT) staff	4	2.02%
CSO	4	2.02%
Analyst	3	1.52%
CEO, COO, Owner, Partner/President	3	1.52%
admin	1	0.51%
Backup/storage management/administration	1	0.51%
Consultant/Systems integrator	1	0.51%
Director of sales and marketing	1	0.51%
EVP/SVP/VP of business applications	1	0.51%
EVP/SVP/VP of sales and marketing	1	0.51%
mobility coordinator	1	0.51%
practice head	1	0.51%
product Manager	1	0.51%
Sr. Security Consultant	1	0.51%
VP - Purchasing	1	0.51%
VP Operations	1	0.51%

Total responses to this question: 198