

Linux-Related Technical Support Comparative Study Executive Summary

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LINUX-RELATED TECHNICAL SUPPORT COMPARATIVE STUDY EXECUTIVE SUMMARY

PROJECT SCOPE & OBJECTIVES

Lighthouse Research & Development, Inc. conducted a research study to compare customer perceptions of the Linux-related technical support services provided by Novell, Oracle, and Red Hat.

This research study consisted of gathering the opinions of technical personnel at companies who had used the Linux-related support services provided by Novell, Oracle, or Red Hat within the past twelve months through:

- An online survey (quantitative)
- In-depth individual telephone interviews (qualitative)

A total of 357 online surveys were completed, providing a 95% confidence level, with a $\pm 4.4\%$ margin of error. The surveys were completed by respondents in SMB and Enterprise companies throughout the world, including Asia, Europe, Africa, South America, and North America. In addition to the online surveys, a total of 31 in-depth interviews were completed.

This research model, which combines quantitative and qualitative research, provides both the statistical validity of a comprehensive sample, which is provided by the online survey, as well as the deeper understanding and detailed explanations provided by the in-depth individual interviews.

The main purposes of this research study were to measure satisfaction with Linux-related technical support, and to compare the customer satisfaction among the three vendors: Novell, Oracle, and Red Hat.

Throughout this summary, the three vendors: Novell, Oracle, and Red Hat are referenced to and listed in alphabetical order.

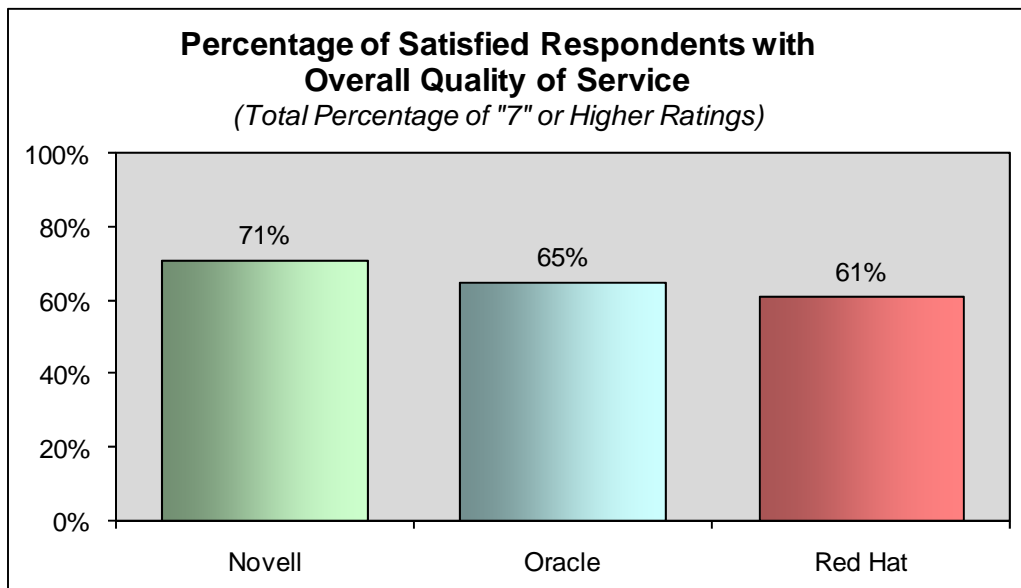
At the time these surveys were conducted, Novell's Linux-related technical support services were provided by Novell, Inc. With Novell's recent acquisition by the Attachmate Group, these support resources have been moved to Attachmate's SUSE business unit.

RESEARCH FINDINGS

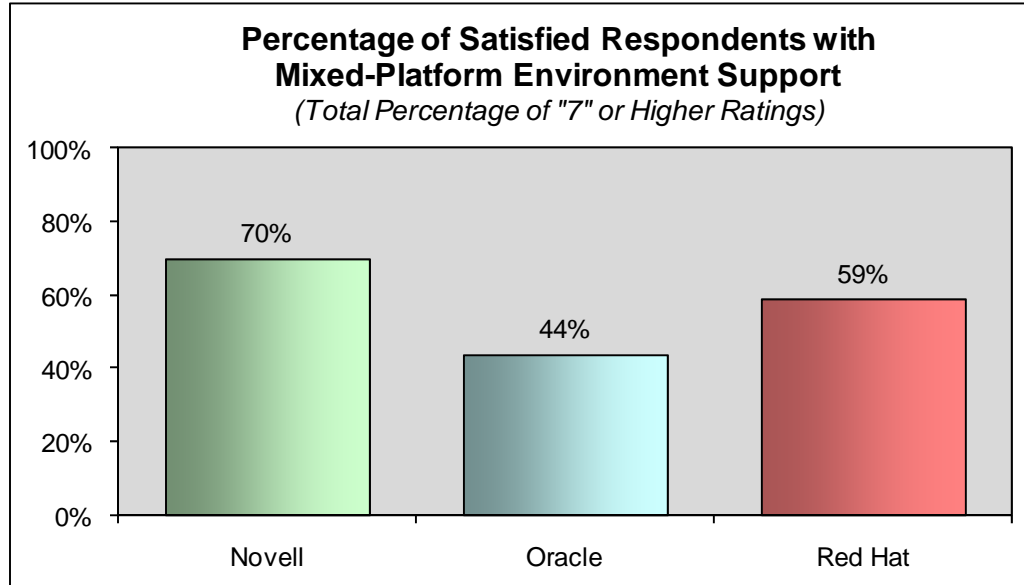
Satisfaction Levels

In general, the research establishes that Novell's Linux-related support services are preferred to the Linux-related support services provided by Oracle and Red Hat. The research verifies that, on average, individuals using Novell's Linux support experienced higher levels of satisfaction compared to the services provided by Red Hat or Oracle.

- When comparing the ratings of the overall quality of service, Novell received the highest ratings, while Red Hat received the lowest ratings. The following chart provides the percentage of users who rated the support received from each vendor positively by selecting a "7" or higher on the zero-to-ten scale.

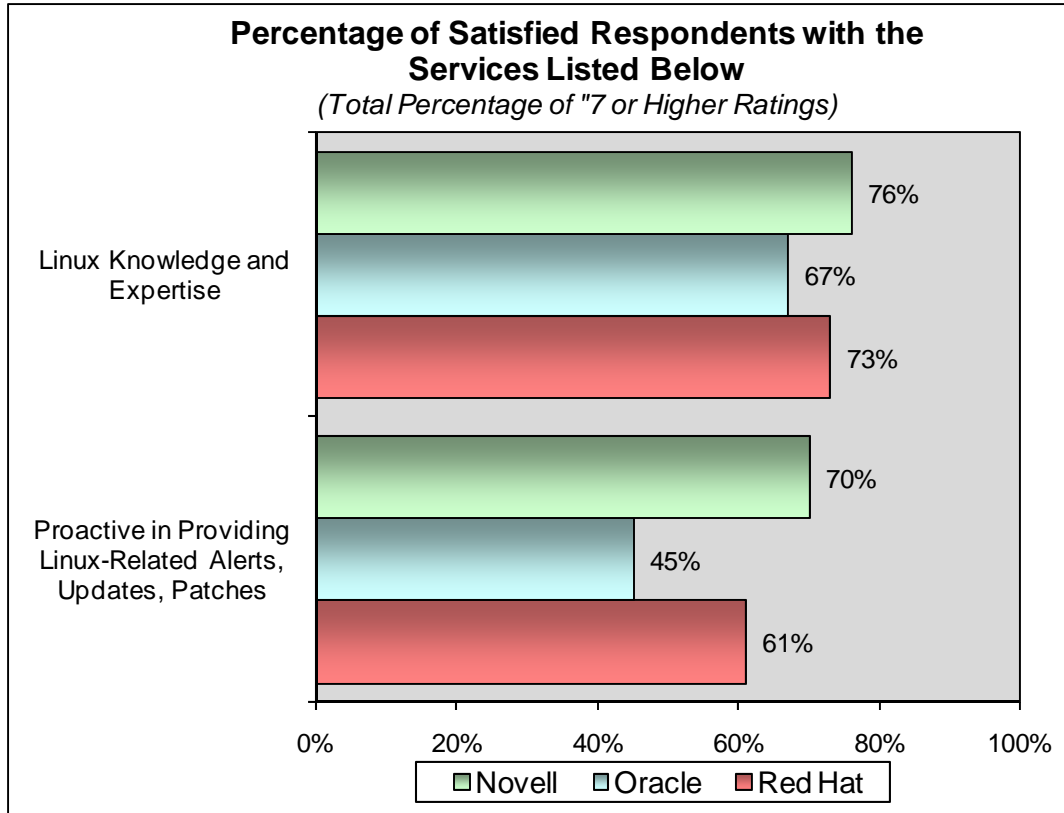


- Novell received statistically higher satisfaction ratings, on a scale of zero-to-ten, than Red Hat and Oracle in regards to support for Linux-related solutions in a mixed-platform environment. The following chart indicates the percentage of respondents who rated each provider's support services positively, by giving a rating of "7" or higher on a zero-to-ten scale.



In-depth interview participants explained that Novell stands out among vendors in the area of interoperability and mixed-platform support. Respondents expressed satisfaction with the way Novell acknowledges and helps to fix any integration problems that arise.

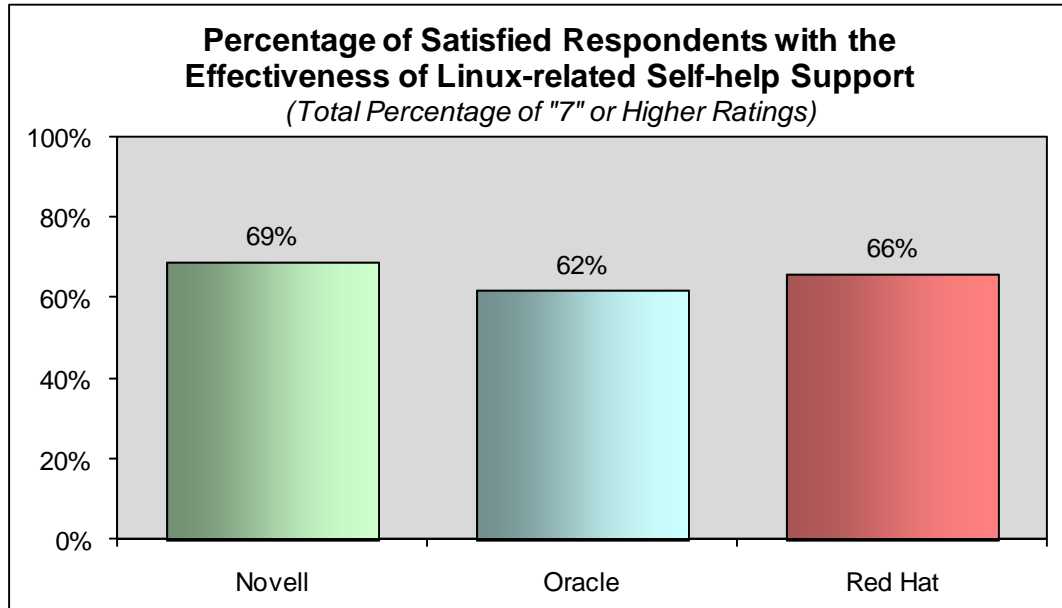
- Novell and Red Hat received statistically higher satisfaction ratings, on a scale of zero-to-ten, than Oracle in the following two areas:
 - Linux Knowledge and Expertise
 - How Proactive the Vendor is at Providing Linux-Related Support Alerts, Updates, and Patches
- The following chart provides the percentage of respondents who are satisfied with each service criteria.



The in-depth interview results explain that satisfied Novell participants felt Novell technical support personnel were highly knowledgeable and experienced due to their amount of Linux experience. Participants also rated Novell updates highly, saying they receive emails, sometimes daily, to alert them of any patches, updates, etc., they may need.

Participants who were satisfied with Red Hat's service explained that Red Hat is highly knowledgeable with Linux products, and is ready and able to assist in a wide-variety of circumstances. Red Hat participants gave high ratings because Red Hat sends updates in a timely manner, and their updates contain all of the necessary information.

- When comparing the ratings of Linux-related self-help support, Novell received the highest ratings, of the three providers, while Red Hat received the second highest ratings, and Oracle received the lowest ratings.



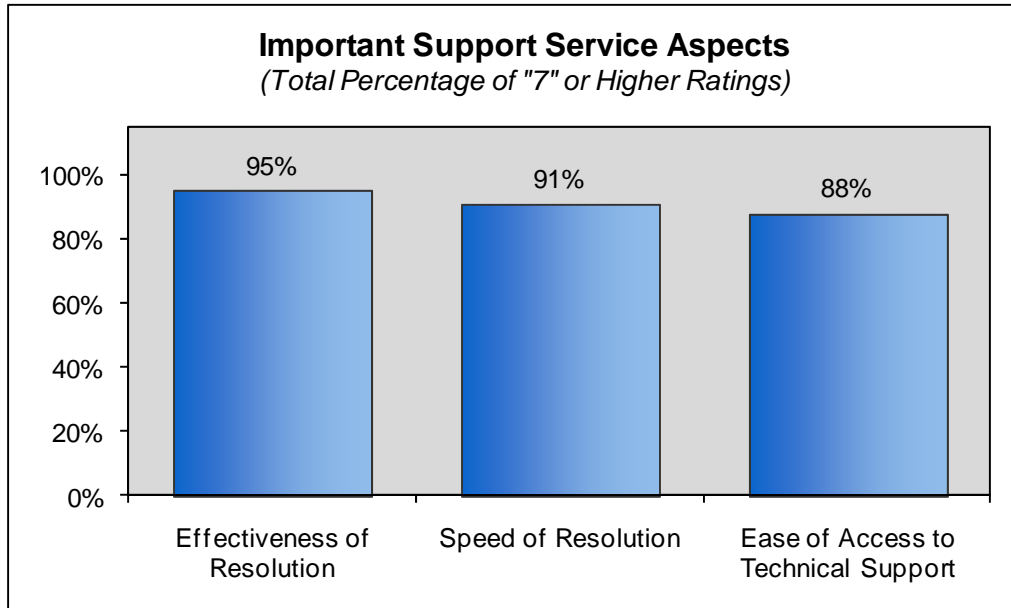
The in-depth interviews explain that Novell received high ratings because they provide more than enough information, and have adequate forums and online communities that aid in resolving issues.

Oracle in-depth interview participants felt although Oracle provides good information, it is sometimes incomplete and difficult to find in their self-support tools.

Red Hat in-depth interview participants explained that Red Hat provides numerous online tools to assist users to search for and find the needed information.

Importance of Technical Support Services

Overall, all three specific aspects of Linux-related support services are important to customers. However, as illustrated below, “effectiveness of resolution” was the most important of the three, “speed of resolution” was the second most important, and “ease of access to tech support” was the least important of the three.



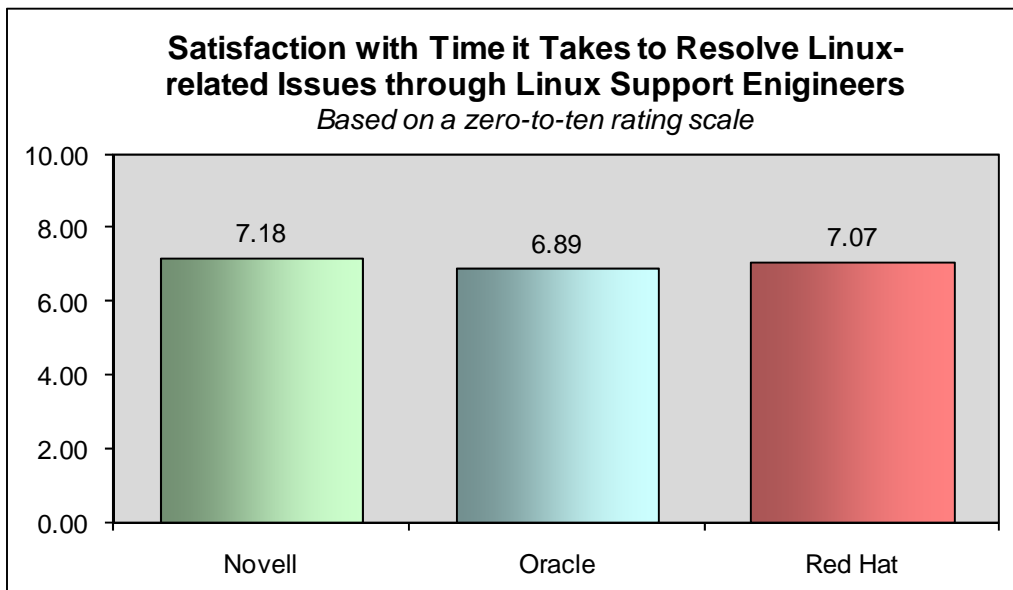
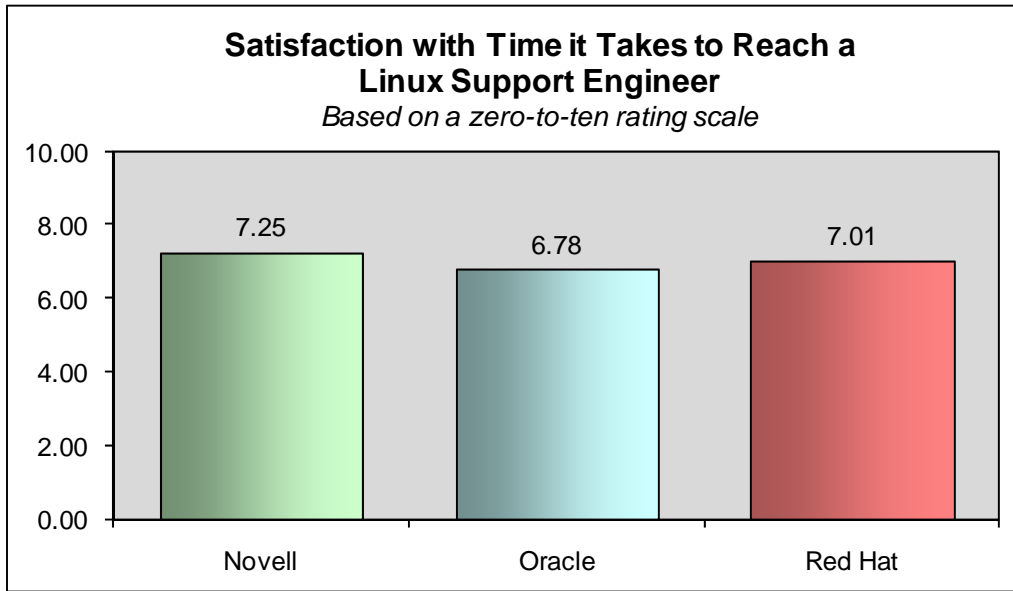
Respondents were asked to indicate what aspect of each vendor’s Linux-related technical support is most valuable. Novell’s support respondents most value “better response times” (11%), while Oracle’ support respondents most value “better support, in general” (17%). Red Hat support respondents identified “better resources such as documentation and knowledgebase” (19%) as the most valuable aspect of Red Hat’s Linux-related technical support.

Respondents were also asked to identify the areas in which each vendor can improve the value of their Linux-related technical support services. Novell users suggested Novell provide better documentation, resources, and access to information (10%). Oracle users suggested Oracle provide increased support (23%). Red Hat users suggested Red Hat provide better access to resources and information (8%)

Timeliness of Service

The average mean satisfaction ratings demonstrate the satisfaction level of customers with specific service factors they are receiving from the service provider.

When dealing with accessing Linux-related technical support as well as the speed of resolving Linux-related issues, Novell users recorded higher ratings of satisfaction, while Red Hat users recorded the second highest ratings, and Oracle the lowest.

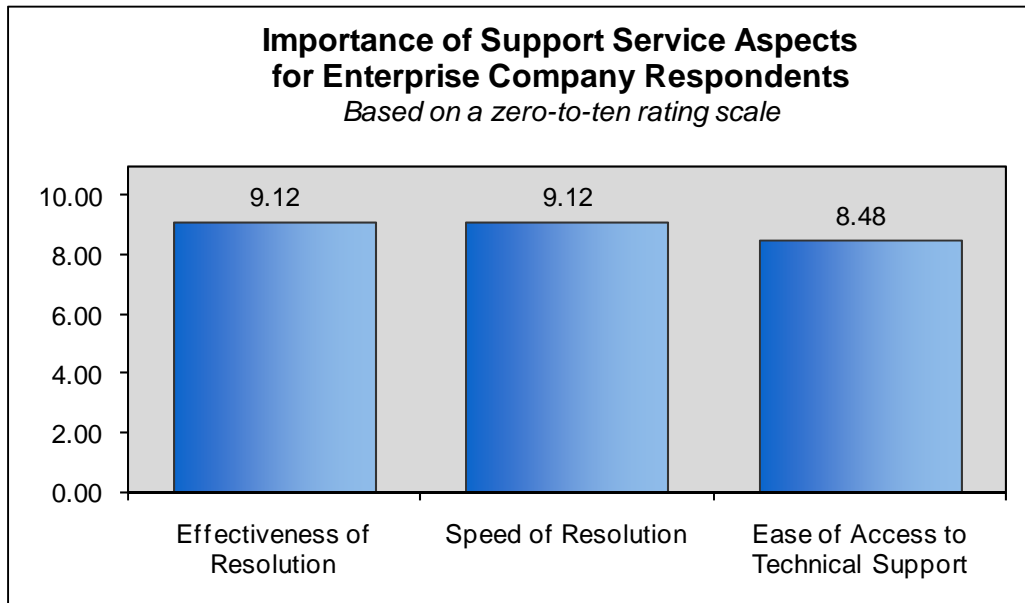


Novell in-depth interview participants are pleased with the amount of time it takes Novell technical support personnel to resolve issues. Red Hat respondents, though less satisfied than Novell respondents, were satisfied with the time it takes to reach a support engineer through Red Hat Linux-related technical support.

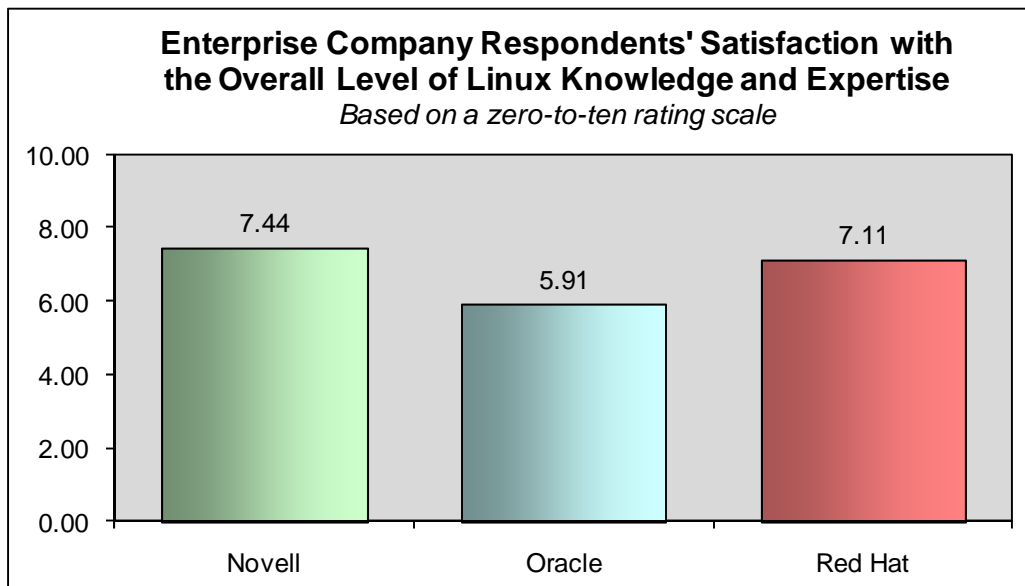
Meeting the Needs of Enterprise Companies

The charts and paragraphs below illustrate the key findings from an analysis of Enterprise companies. Enterprise companies are defined as having 500 or more employees.

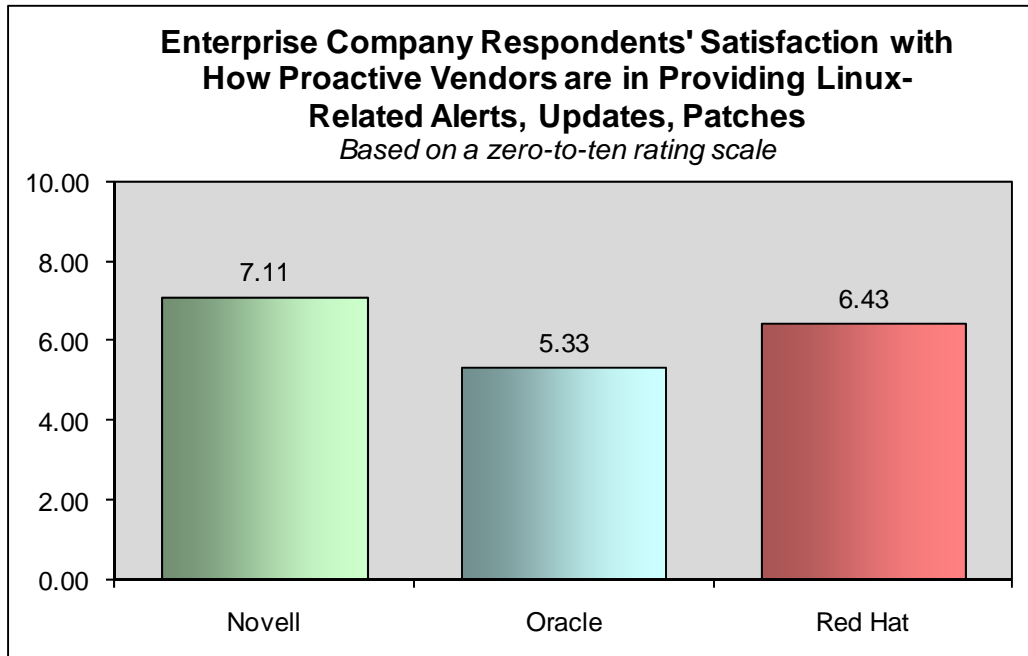
Respondents in Enterprise companies gave equal ratings to both the “effectiveness of resolution” and the “speed of resolution,” which were significantly more important to their organization than the “ease of access to technical support.” *It’s interesting to note that when this analysis was run with respondents in SMB companies (fewer than 500 employees), the speed of resolution was rated the lowest with an average rating of 7.47.*



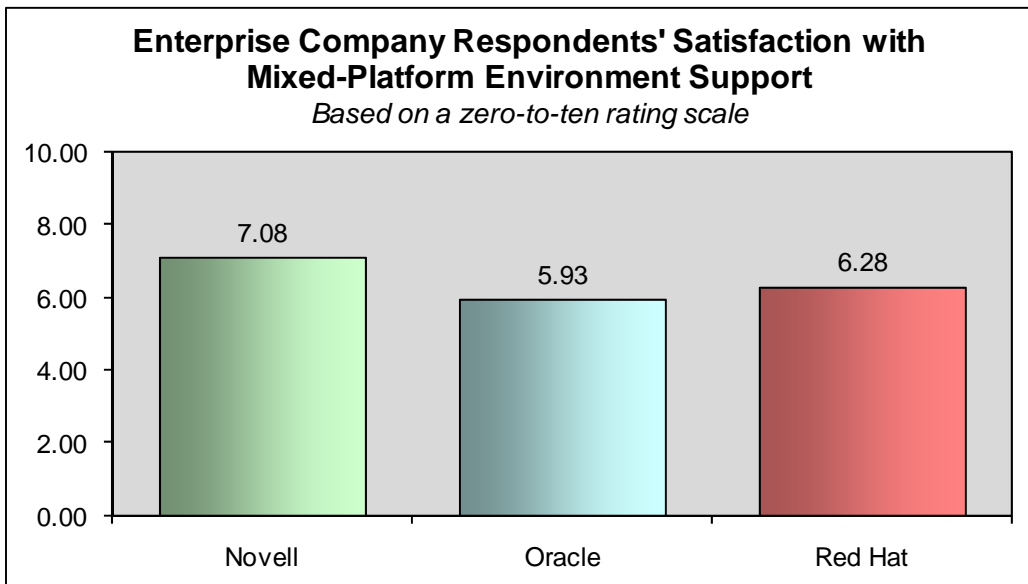
Enterprise company respondents rated their satisfaction with the Linux knowledge and expertise of Novell and Red Hat higher than Oracle.



Enterprise company respondents rated their satisfaction with how proactive Novell is in providing Linux-related support alerts, updates, and patches higher than Oracle.



Enterprise company respondents were more satisfied with how Novell supports their Linux-based solutions in an environment of mixed platforms than Red Hat or Oracle.



Overall Conclusion

In conclusion, Novell users recorded the highest satisfaction ratings for the overall quality of service, as well as for many of the aspects of the Linux-related technical support they receive. Red Hat generally received slightly lower ratings than Novell, with Oracle receiving even lower ratings.

