

# THE ENTERPRISE MOBILE APP MARKET STATUS REPORT 2012

THE STATUS OF MOBILE APPS  
IN THE ENTERPRISE ENVIRONMENT

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# 1 CONTENTS

<b>2</b>	<b>PREFACE .....</b>	<b>5</b>
<b>3</b>	<b>CHARACTERIZING THE MARKET FOR MOBILE APPS IN THE ENTERPRISE.....</b>	<b>6</b>
3.1	DRIVERS OF MOBILE APP ADOPTION.....	6
3.2	ENTERPRISE MOBILE APP VALUE CHAIN.....	8
3.3	SCOPE OF THE REPORT.....	12
<b>4</b>	<b>STATUS OF MOBILE APPS IN THE ENTERPRISE.....</b>	<b>14</b>
4.1	HOW COMPANIES ARE USING ENTERPRISE APPS.....	14
4.1.1	<i>Mobile device policy in the enterprise .....</i>	<i>15</i>
4.1.2	<i>Current and planned usage/functionality of mobile enterprise apps .....</i>	<i>16</i>
4.1.3	<i>Mobile enterprise app sourcing, platforms and distribution .....</i>	<i>21</i>
4.1.4	<i>Planned investments in enterprise apps and downloads .....</i>	<i>23</i>
4.1.5	<i>Barriers to adoption and issues of security .....</i>	<i>25</i>
4.1.6	<i>Benefits associated with app usage .....</i>	<i>26</i>
<b>5</b>	<b>STATUS OF ENTERPRISE APPS SOURCING.....</b>	<b>29</b>
5.1	ENTERPRISE-RELEVANT APPS WITHIN THE CONSUMER APPS ECOSYSTEM.....	30
5.1.1	<i>Overview of stores and enterprise-relevant categories .....</i>	<i>30</i>
5.1.2	<i>Apps with high relevance for the enterprise .....</i>	<i>34</i>
5.1.3	<i>the 10 categories of “Core enterprise” apps.....</i>	<i>37</i>
5.2	ENTERPRISE-ORIENTED MOBILE SERVICE OFFERINGS (LEGACY AND EMERGING VENDORS).....	43
5.2.1	<i>Status of mobile offerings from traditional enterprise vendors .....</i>	<i>44</i>
5.2.2	<i>Status of mobile offerings from oem/hardware vendors .....</i>	<i>48</i>
5.2.3	<i>Status of mobile enterprise offerings from mobile os leaders .....</i>	<i>49</i>
5.2.4	<i>Status of mobile offerings from “mobile first” vendors .....</i>	<i>52</i>
<b>6</b>	<b>MOBILE DEVICE AND APP MANAGEMENT .....</b>	<b>55</b>
6.1	STATUS OF MOBILE DEVICE MANAGEMENT (MDM) SYSTEMS ILLUSTRATED ALONG TOP 5 VENDORS .....	55
6.2	STATUS OF MOBILE ENTERPRISE APPLICATION PLATFORMS (MEAPS) ILLUSTRATED ALONG TOP 5 VENDORS .....	59
<b>7</b>	<b>OUTLOOK: ENTERPRISE APP MARKET TRENDS AND CHALLENGES .....</b>	<b>63</b>
7.1	TRENDS.....	63
7.2	CHALLENGES.....	65
<b>8</b>	<b>ABOUT RESEARCH2GUIDANCE .....</b>	<b>69</b>
<b>9</b>	<b>APPENDIX.....</b>	<b>71</b>
9.1	ENTERPRISE MOBILE APPS: REALITY CHECK SURVEY PARTICIPANTS.....	71
9.2	LIST OF BUSINESS APPS SURVEYED .....	74
9.3	ADDITIONAL EXAMPLES OF CORE ENTERPRISE APP DEVELOPER TYPES.....	78
9.4	GLOSSARY .....	79

## LIST OF FIGURES

FIGURE 1: THE PROLIFERATION OF MOBILE DEVICES.....	6
FIGURE 2: FACTORS DRIVING THE GROWTH OF MOBILE APPS IN THE ENTERPRISE.....	7
FIGURE 3: ENTERPRISE MOBILE APP VALUE CHAIN.....	8
FIGURE 4: VENDORS AND SERVICE PROVIDERS ALONG THE ENTERPRISE MOBILE APP VALUE CHAIN .....	10
FIGURE 5: BROAD CLASSIFICATION OF APPS EMPLOYED BY THE ENTERPRISE.....	12
FIGURE 6: ENTERPRISE MOBILE DEVICES POLICIES (STATUS QUO AND ANTICIPATED CHANGES) .....	15
FIGURE 7: MOBILE ENTERPRISE APPS AND THEIR EVOLVING IMPORTANCE.....	16
FIGURE 8: ENTERPRISE DEPLOYMENT OF B2E MOBILE APPS BY DEPARTMENT .....	17
FIGURE 9: ENTERPRISE DEPLOYMENT OF B2P MOBILE APPS BY FUNCTION .....	18
FIGURE 10: ENTERPRISE DEPLOYMENT OF B2C MOBILE APPS BY FUNCTION.....	19
FIGURE 11: TYPES OF APPS PLANNED TO BE LAUNCHED DURING 2012 AND 2013.....	20
FIGURE 12: MOBILE PLATFORMS RUNNING ENTERPRISE APPS.....	21
FIGURE 13: CURRENT AND PLANNED DEVELOPMENT/SOURCING OF MOBILE APPS.....	22
FIGURE 14: ENTERPRISE MOBILE APP DISTRIBUTION .....	22
FIGURE 15: ESTIMATED INVESTMENT IN ENTERPRISE MOBILE APPS IN THE NEXT 2 YEARS (IN US\$) .....	23
FIGURE 16: CHANGE IN ANNUAL BUDGET FOR THE DEVELOPMENT AND MANAGEMENT OF MOBILE APPS OVER NEXT THREE YEARS .....	24
FIGURE 17: TOTAL DOWNLOADS NUMBER OF B2C OF APPS.....	24
FIGURE 18: BARRIERS TO MOBILE ENTERPRISE APP IMPLEMENTATION .....	25
FIGURE 19: EXPERIENCED BENEFITS OF USING B2C APPS.....	26
FIGURE 20: EXPERIENCED BENEFITS OF USING B2E APPS.....	27
FIGURE 21: EXPERIENCED BENEFITS OF USING B2P APPS.....	28
FIGURE 22: TOTAL NUMBER OF APPS IN OS/OEM STORES (Q2 2009 –Q4 2011) .....	30
FIGURE 23: NUMBER OF POTENTIALLY RELEVANT OFF-THE-SHELF ENTERPRISE APPS.....	31
FIGURE 24: ENTERPRISE APP PENETRATION IN MAJOR APP STORES (Q1 2012) .....	32
FIGURE 25: PAID VS. FREE APPS & SHARE OF PAID APPS IN ENTERPRISE-RELEVANT CATEGORIES.....	33
FIGURE 26: SHARE OF APPS IN APP STORES ACCORDING TO THEIR RELEVANCE FOR ENTERPRISES .....	35
FIGURE 27: TYPES OF VENDORS TARGETING ENTERPRISE MOBILITY.....	43
FIGURE 28: SAP APP STORE APPS BY OPERATING SYSTEM .....	46
FIGURE 29: EXAMPLE OF SAP APP PRICING CATEGORIES.....	47
FIGURE 30: CISCO AND LENOVO APP STORE COMPARISON.....	48
FIGURE 31: SELECTION AND SOURCE CATEGORIES FOR APPLE'S @WORK SELECTION.....	50
FIGURE 32: FREE AND PAID APPS IN APPLE'S @WORK SELECTION.....	51
FIGURE 33: OOMNIZA ASSET SUITE APP .....	53
FIGURE 34: TAPTERA "COLLATERAL" FOR IPAD.....	54
FIGURE 35: SURVEY RESPONDENTS BY REGION AND COUNTRY .....	70
FIGURE 36: SURVEY RESPONDENTS BY INDUSTRY AND COUNTRY SIZE.....	70

## LIST OF TABLES

TABLE 1: CLASSIFICATION OF BUSINESS APPS.....	34
TABLE 2: BUSINESS APP SURVEY AVERAGE DISPLAYED PRICE RESULTS.....	36
TABLE 3: CATEGORIZATION OF “CORE ENTERPRISE” APPS.....	37
TABLE 4: EXAMPLES OF “AUDIT/EVALUATION” APPS.....	38
TABLE 5: EXAMPLES OF “BUSINESS INTELLIGENCE” APPS.....	38
TABLE 6: EXAMPLES OF “COLLABORATIVE” APPS .....	39
TABLE 7: EXAMPLES OF “CRM” APPS .....	39
TABLE 8: EXAMPLES OF “ERP” APPS.....	40
TABLE 9: EXAMPLES OF “IT” APPS.....	40
TABLE 10: EXAMPLES OF “MANUFACTURING/ENGINEERING/FARMING” APPS .....	41
TABLE 11: EXAMPLES OF “ORGANIZATIONAL/OPERATIONAL” APPS.....	41
TABLE 12: EXAMPLES OF “SALES/MARKETING” APPS.....	42
TABLE 13: EXAMPLES OF “SERVICE” APPS.....	42
TABLE 14: OVERVIEW OF SELECT TRADITIONAL ENTERPRISE VENDORS’ MOBILE OFFERINGS.....	44
TABLE 15: MOBILE ENTERPRISE APP MARKET TRENDS.....	63
TABLE 16: MOBILE ENTERPRISE APP MARKET CHALLENGES .....	65
TABLE 17: EXAMPLES OF “MOBILE FIRST” DEVELOPERS.....	78
TABLE 18: EXAMPLES OF “BACK-END MOBILITY” DEVELOPERS .....	78
TABLE 19: EXAMPLES OF “DIVERSE PORTFOLIO” DEVELOPERS.....	78

## 2 PREFACE

research2guidance is a research specialist that focuses on providing insights into the market for smartphones/tablets and mobile applications. Our aspiration is to provide business leaders with facts and analyses which will assist them in better understanding the most important trends shaping these markets.

This report concentrates on the state of the enterprise mobile application market, including results from a survey of 476 enterprises and an analysis of more than 1,000 business apps across five consumer app stores. The report also features perspectives on the vendors and developers working in the mobile enterprise app space with a look at both their products and service offerings.

research2guidance offers a wide range of content and format options to provide the information you need. Our offerings include:

### **Reports:**

- Feature a detailed analysis of major trends and developments affecting the market in question, covering both entire markets as well as market segments.
- Contain key insights for companies looking to enter or deepen their engagement in the mobile application market.
- Provide data and analyses on all relevant aspects of the market to aid investment decision-making.

### **Ready-to-use tools:**

- Include a broad range of Power Point slides present content that can be easily downloaded and incorporated into any presentation.

### **Research projects:**

- Are tailored specifically to address your smartphone/tablet market and mobile application market information needs.
- Examples include: Developer surveys, mobile application strategy definition, and competitor and country analysis.

Additional research on the market for smartphone/tablets and mobile applications can be accessed at [www.research2guidance.com](http://www.research2guidance.com).

Please note that as with all research2guidance projects, the research behind this report has not been commissioned or sponsored in any way by any business, government, or other institution.

### 3 CHARACTERIZING THE MARKET FOR MOBILE APPS IN THE ENTERPRISE

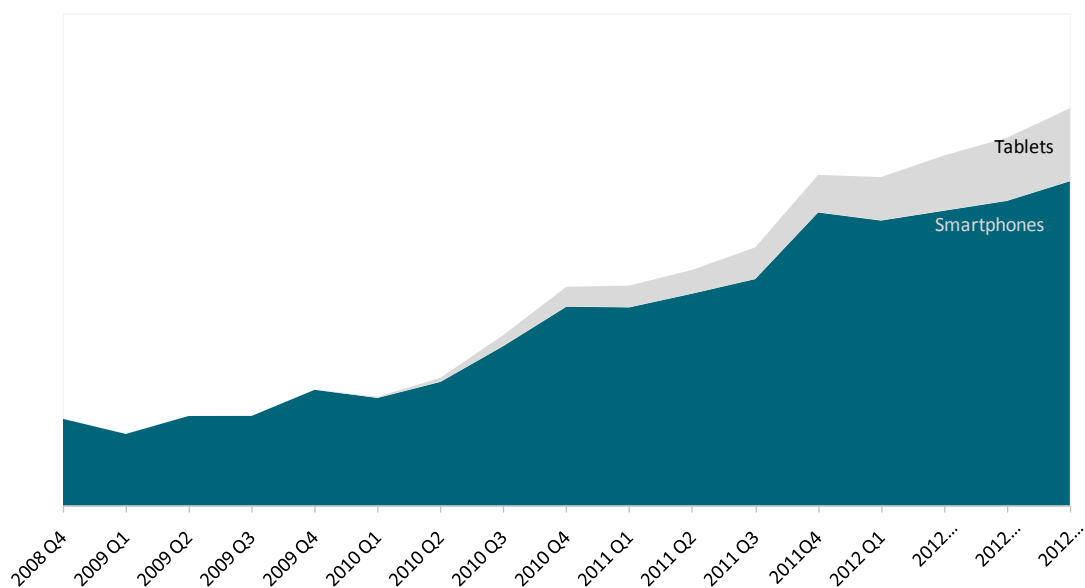
#### 3.1 DRIVERS OF MOBILE APP ADOPTION

Following the extensive growth of mobile applications in the consumer market, the market for mobile applications in the enterprise environment has tipped in the last 12-16 months. This “tip” has been driven by several factors:

**I. The xxxx of mobile devices – both employee-owned and company-owned – has increased the number of workers using mobile devices to a level now greater than ever before.** While some mobile enterprise apps, such as those devoted to xxxx, have been mobilized to a certain degree for the better part of a decade, many have depended on ruggedized devices, which were not widely deployed.

**FIGURE 1: THE PROLIFERATION OF MOBILE DEVICES**

Devices shipped per  
quarter (in millions)



Source: research2guidance (estimates).

Global shipments surpassed xxxx million smartphones and xx million tablets in 2011. With more than xx% of workers being able to use their smartphone in the workplace<sup>1</sup>, and more than xx% of tablet devices being purchased for enterprise use, mobile device penetration in the enterprise is continuing to increase rapidly.

**II. Raised expectations regarding the speed and usability of workplace technology.** Given the accessibility to user-friendly, consumer mobile devices and applications, employees are

<sup>1</sup> research2guidance global survey *Enterprise Mobile Apps: Reality Check*, Q4 2011.

The xxxx of mobile apps in the enterprise has caused the corresponding value chain to stretch from development and sourcing, into areas of management and maintenance. Given the importance of xxxx and xxxx, application and device management are becoming increasingly intertwined within the value chain.

FIGURE 3: ENTERPRISE MOBILE APP VALUE CHAIN

Enterprise mobile app value chain



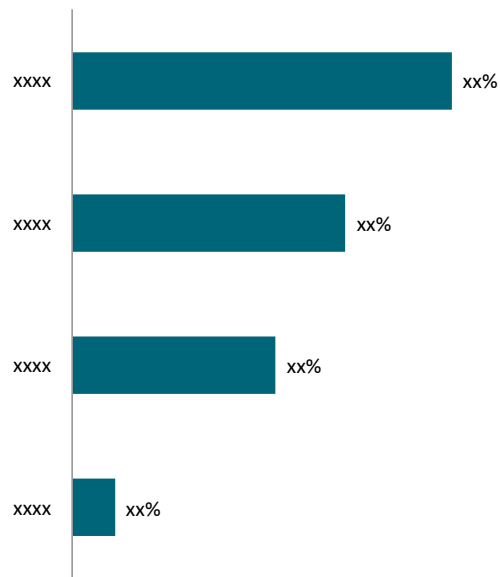
Source: research2guidance, 2012.

**Development:** During the development process decisions must be made with regards to a number of issues: 1) xxxx (xxxx, xxxx, xxxx); 2) xxxx (xxxx, xxxx, xxxx, etc.); 3) xxxx (xxxx to use cross-platform products); 4) xxxx.

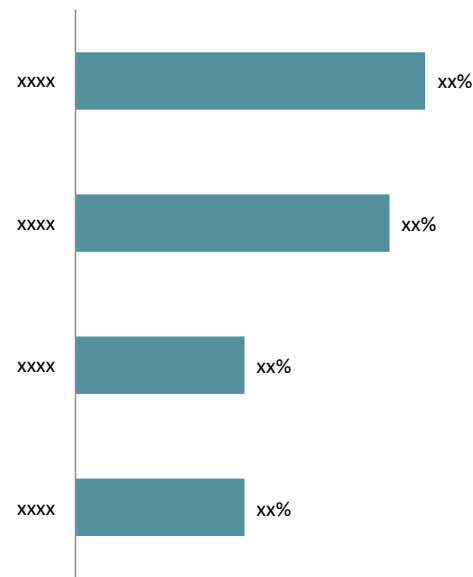
**Sourcing:** Includes all methods of getting apps into the enterprise, ranging from off-the-shelf apps in consumer and niche app stores (xxxx, xxxx, xxxx, xxxx) to highly-customized development. The dominant model for custom apps is one which is xxxx, undertaken with either internal or external resources, or a combination of both. The market for app development services has become a substantial IT service market, reaching US\$ xx billion in 2011.<sup>3</sup>

<sup>3</sup> For more detail on the app developer market please see research2guidance report, “The Market for App Development Services”.

### How are enterprise apps developed and sourced at the company?



### How companies, that do not use enterprise apps, plan to source and develop them in the future?



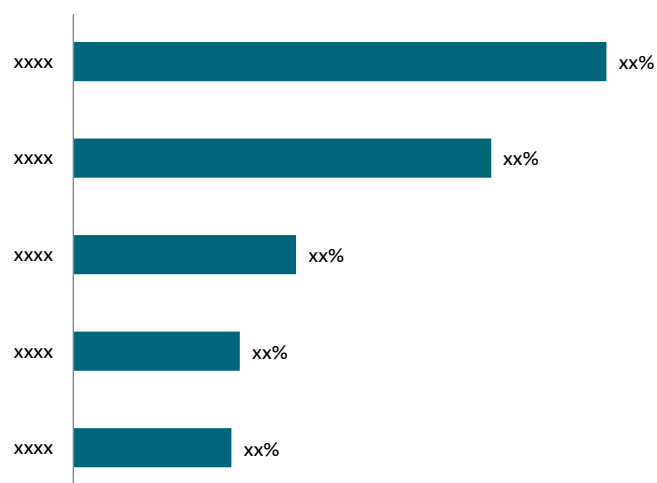
Original questions: “How are enterprise apps developed and sourced at your company?”; “How do you plan to source your enterprise mobile apps?”.

Source: research2guidance global survey *Enterprise Mobile Apps: Reality Check*, Q4 2011.

The concept of app stores as a way of cataloging and distributing enterprise apps has been adopted by xxxx companies currently employing mobile apps. Employees gain access to the apps the company wants them to use by going to public app stores (xx%) and internal app stores (xx%). Pre-loading is also an option, but is being used to xxxx.

## FIGURE 12: ENTERPRISE MOBILE APP DISTRIBUTION

### How do employees, partners and customers access enterprise mobile apps?



Original question: “How do employees, partners and customers access your enterprise mobile apps?”.

Source: research2guidance global survey *Enterprise Mobile Apps: Reality Check*, Q4 2011.

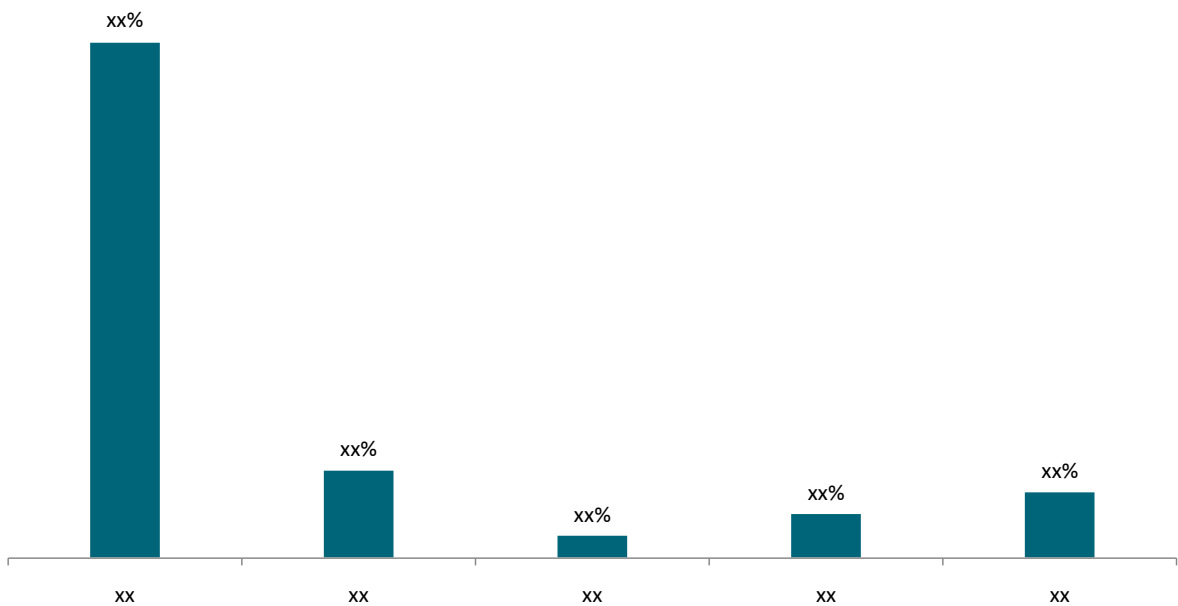


4.1.3 PLANNED INVESTMENTS IN ENTERPRISE APPS AND DOWNLOADS

Averaging across all company’s sizes, an xxxx of companies (xx%) plan to invest US\$ xxxx or less on the development and maintenance of mobile apps. While these budgets are rather conservative, they reflect enterprises’ evolving focus on B2C apps, which costs on average between US\$ xxxx to US\$ xxxx to develop.

Greater emphasis on B2E apps, which tend to be more sophisticated and require maintenance and management, thus costing more, is likely to push budget setting to xxxx over time.

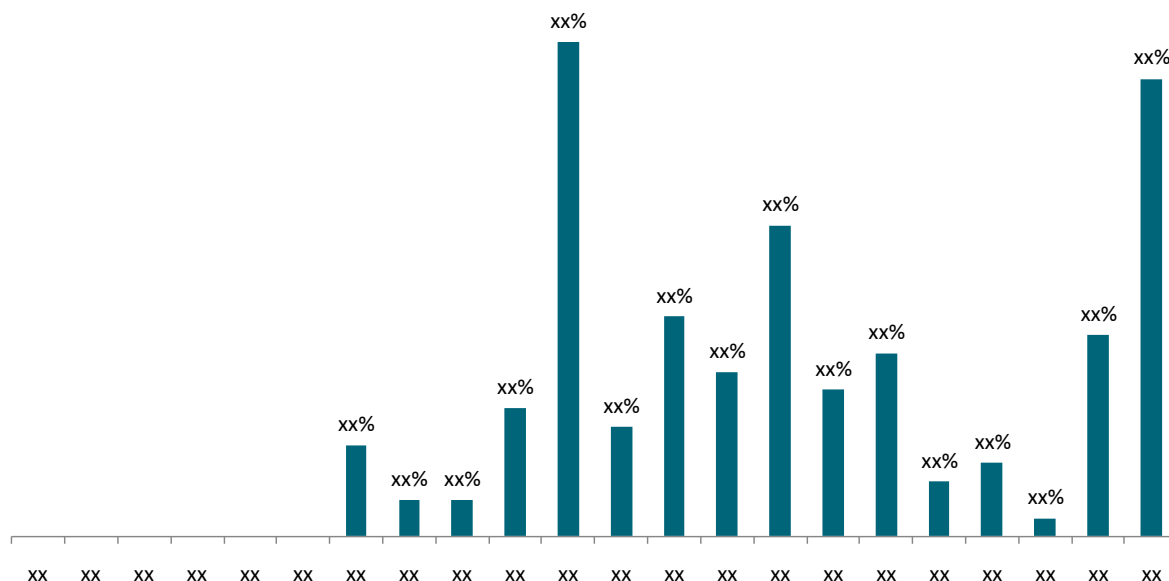
FIGURE 13: ESTIMATED INVESTMENT IN ENTERPRISE MOBILE APPS IN THE NEXT 2 YEARS (IN US\$)



Original question formulation: “Estimated company’s investment in mobile apps in the next 2 years in US\$?”.  
Source: research2guidance global survey *Enterprise Mobile Apps: Reality Check*, Q4 2011.

Additionally, budgets are set with a time lag, which might have seen the 2012/2013 budgets being set during a time of deep economic recession and uncertainty for most companies.

**FIGURE 14: CHANGE IN ANNUAL BUDGET FOR THE DEVELOPMENT AND MANAGEMENT OF MOBILE APPS OVER NEXT THREE YEARS**

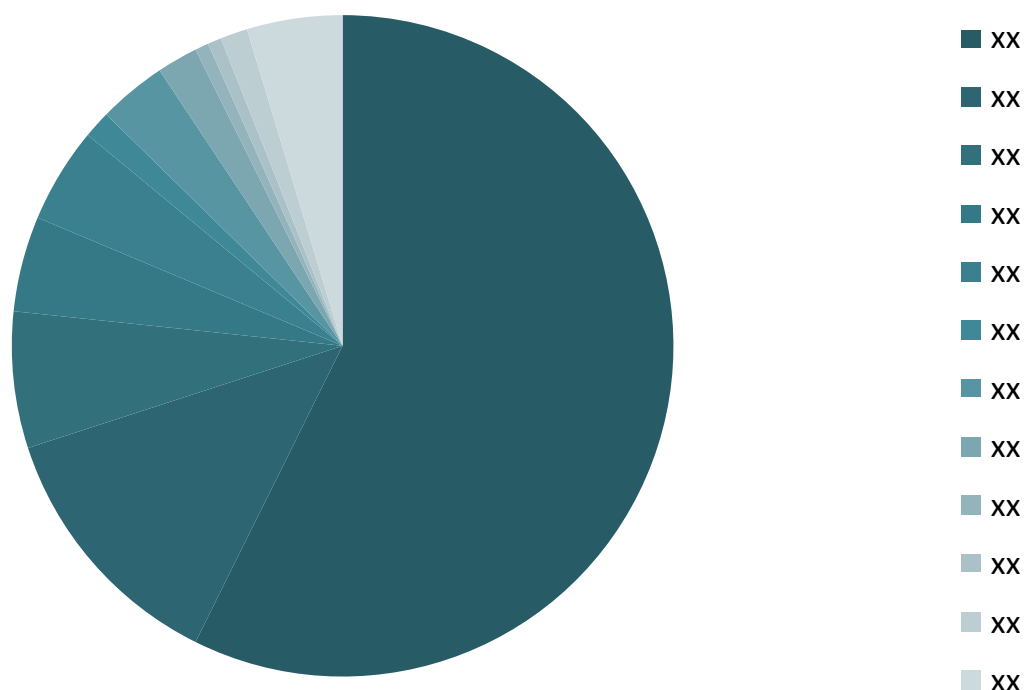


Original question formulation: "Estimated company's investment in enterprise mobile apps in the next 2 years in US\$?".

Source: research2guidance global survey *Enterprise Mobile Apps: Reality Check*, Q4 2011.

No dominant pattern emerged with regards to xxxx in mobile apps over the next three years. Over xxxx of companies (xx%) plan to stick with their current budget, while a somewhat xxxx (xx%) plan to increase it by over xx%.

**FIGURE 15: TOTAL DOWNLOADS NUMBER OF B2C OF APPS**

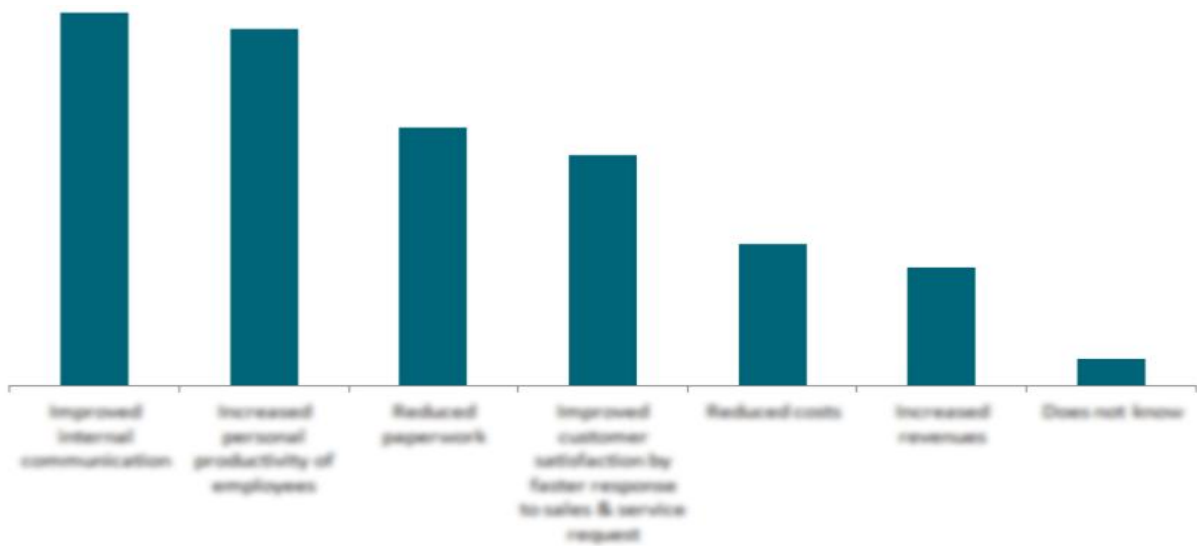


B2E Apps

For apps that are being used internally, companies are experiencing more tangible results. Apps promote xxxx (xx%) and enhance productivity (xx%), but also help to reduce xxxx (xx%). The benefits companies are experiencing are reminiscent of the early stages of the “traditional” computer-based, IT company services, particularly “xxxx” (xx%).

As seen in the graph below, “xxxx,” with just under a third of responses (xx%), followed by “xxxx” (xx%) were the least cited benefits of B2E app adoption.

FIGURE 18: EXPERIENCED BENEFITS OF USING B2E APPS



Question formulation: “How did your company benefit from using the “partner integration” mobile apps?”.  
Source: research2guidance global survey *Enterprise Mobile Apps: Reality Check*, Q4 2011.

BEST PRACTICE IN B2E:XXXX MOBILE BUSINESS INTELLIGENCE PLUS

In Q1 2011, American xxxx xxxx, in partnership with business intelligence (BI) software provider xxxx, developed an iPad app to provide operational staff with access to large amounts of easy to view and interpret data.

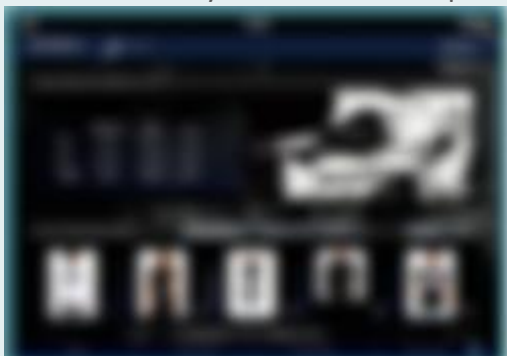


Image source: xxxx

Instead of targeting just upper level management, xxxx aimed to provide data and functionality to a broad range of users including:

- Buyers and merchandise allocators
- Executives and division managers
- Designers

As the app requires little training, staff were able to immediately begin using and implementing processes around it, including replacing cumbersome spreadsheets/binders. xxxx claims that the increased ability of staff to make immediate decisions has positively impacted sales and revenue growth.

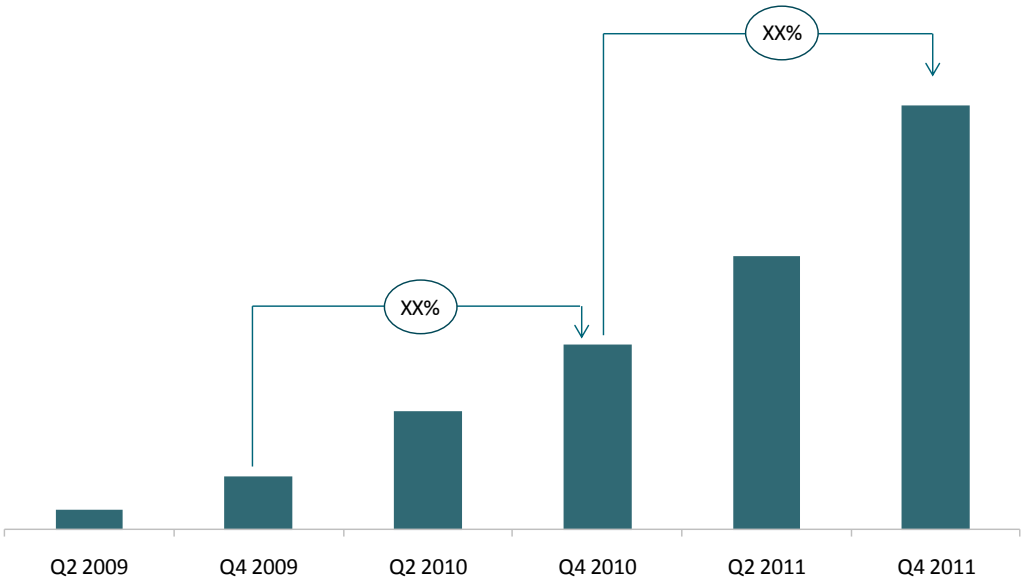
5.1 ENTERPRISE-RELEVANT APPS WITHIN THE CONSUMER APPS ECOSYSTEM

Apps which can be potentially used in the enterprise environment can span a number of different functions, and can thus be classified under a number of categories within app stores. This highlights the difficulty most enterprises face in sourcing apps from the existing consumer-focused app stores.

5.1.1 OVERVIEW OF STORES AND ENTERPRISE-RELEVANT CATEGORIES

The largest stores in the consumer app market are those operated by xxxx and xxxx. While these stores were not the first in the market, they have come to dominate the market in terms of size and number of downloads, growing from just over xxxx apps in Q2 xxxx to over xxxx by the close of xxxx.

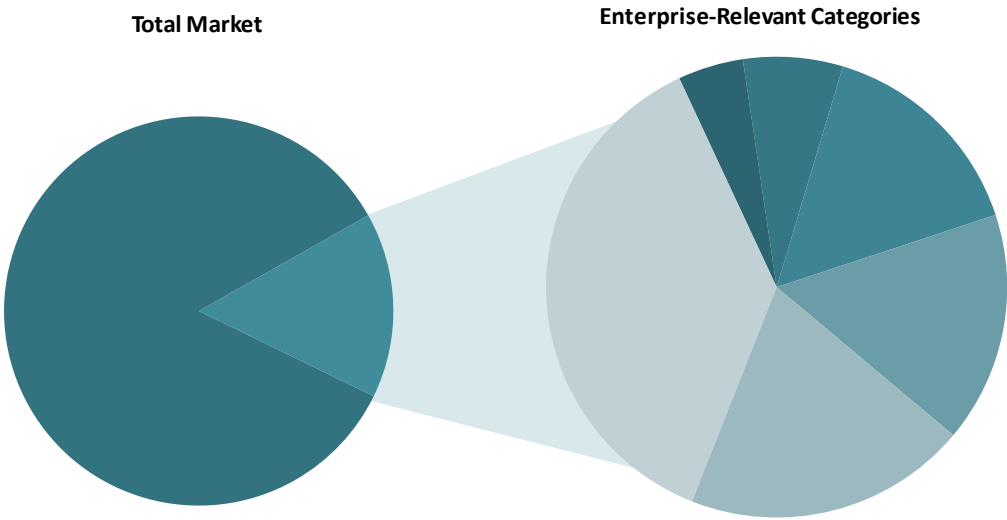
FIGURE 20: TOTAL NUMBER OF APPS IN OS/OEM STORES (Q2 xxxx – Q4 xxxx)



Base: xxxx, xxxx, xxxx, xxxx, xxxx and xxxx.  
Source: research2guidance, 2012.

The largest of these categories is “xxxx” at xx percent, followed by “xxxx” at xx percent, “xxxx” at xx percent, and “News” at xx percent. The category which experienced the most growth was “xxxx”, more than x from Q1 x (xx) to Q1 x (39,249).

FIGURE 22: ENTERPRISE APP PENETRATION IN MAJOR APP STORES (Q1 2012)



Note: Calculation based on xxxx, xxxx, xxxx, xxxx and xxxx.  
Source: research2guidance, 2011.

This growth was driven by the rapid addition of “xx” apps within Google Play (formerly the Android Market), from xxxx to xxxx and the Apple App Store, from xxxx to xxxx. Consequently Apple’s App Store and Google Play contain the xxxx of potentially enterprise-relevant apps, over xxxx and xxxx respectively.

### 5.1.2 APPS WITH HIGH RELEVANCE FOR THE ENTERPRISE

The xxxx category of consumer app stores contains a wide selection of apps, apps which range from being highly relevant to the xxxx – to being completely irrelevant. Thus, the xxxxx category can be broken down into four distinguishable categories. (please refer to the table below)

**TABLE 1: CLASSIFICATION OF BUSINESS APPS**

Category	Sub-category	Examples of apps
Productivity	1. General productivity tools	Calendar, Mail, Photos, etc.
	2. Business-specific tools	CRM, ERP, etc.
	3. Industry-specific tools	Healthcare, Finance, etc.
Business Tools	1. General productivity tools	Calendar, Mail, Photos, etc.
	2. Business-specific tools	CRM, ERP, etc.
	3. Industry-specific tools	Healthcare, Finance, etc.
Business Intelligence	1. General productivity tools	Calendar, Mail, Photos, etc.
	2. Business-specific tools	CRM, ERP, etc.
	3. Industry-specific tools	Healthcare, Finance, etc.
Business Development	1. General productivity tools	Calendar, Mail, Photos, etc.
	2. Business-specific tools	CRM, ERP, etc.
	3. Industry-specific tools	Healthcare, Finance, etc.

Source: research2guidance, 2012.

## 7 OUTLOOK: ENTERPRISE APP MARKET TRENDS AND CHALLENGES

2011 was a watershed year for mobile apps in the enterprise not just in terms of adoption and implementation, but also in terms of the number of vendors and service providers proliferating the market. Given the rapid changes and growth in the mobile enterprise space, 2012 and 2013 will see xxxx and xxxx, resulting in a very different landscape xx months from now.

This section examines the trends and challenges across four major areas: apps (from the point of view of the enterprise), app developers, vendors and service providers, and security management and policy.

### 7.1 TRENDS

**TABLE 15: MOBILE ENTERPRISE APP MARKET TRENDS**

Area	Trends
Apps	<ul style="list-style-type: none"> <li>Increased focus on SaaS apps</li> <li>Persistence of native and HTML5 dual strategies</li> <li>Growth of "vertical" (industry-specific) mobile in the enterprise</li> </ul>
App Developers	<ul style="list-style-type: none"> <li>Emergence of new developers will continue</li> <li>Reduction of business overhead will drive third-party revenues</li> <li>Continuation of multiple sourcing models</li> </ul>
Vendors and Service Providers	<ul style="list-style-type: none"> <li>Differentiation of the vendor and service provider landscape by region</li> <li>Consolidation of the mobile market</li> <li>Consolidation of IT</li> </ul>
Security Management and Policy	<ul style="list-style-type: none"> <li>Increased focus on Mobile App Management (MAM)</li> <li>Growth in the importance of internal app stores</li> <li>Emphasis on internal monitoring and monitoring of third-party app stores</li> </ul>

Source: research2guidance, 2012.

#### APPS

- Increased focus on xx apps:** As evidenced in this report, xx apps will become an increasing focus, with more than xx% of companies planning to xxxx during 2012 or 2013. Those off-the-shelf apps which mobilize existing enterprise software solutions (i.e. CRM, ERP, HR, BI, etc.) as well as those solutions (off-the-shelf and custom developed) which target vertical industries (e.g. manufacturing, retail, services, etc.) will be xxxx.
- Persistence of xxxx.**

## 8 ABOUT RESEARCH2GUIDANCE

[research2guidance](#) is a market intelligence and consultancy company specializing in the mobile apps market.

### OUR SERVICE OFFERINGS

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- **Reports and PowerPoint slide-sets:** Market insights on selected topics
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- **Knowledge center:** A subscription to a wealth of data, analysis, profiles, and daily news and opinions.
- **Consulting services:** Projects tailored to assist you in developing your mobile strategy.

### OUR MONITORING ANALYST TEAM

---



**Ralf-Gordon Jahns**

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## CONTACT US

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A one-on-one expert call with a smartphone App Market analyst for

- A personal 15-30 min. consultation
- Questions and answers about our research
- Matching your needs with our research services



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## 9 APPENDIX

### 9.1 ENTERPRISE MOBILE APPS: REALITY CHECK SURVEY PARTICIPANTS

Survey Participants			
1000 Museums	Carrefour	Entrador Consultancy Group	Infosys
ABBY	CB Richard Ellis, Inc.	Ericsson Nikola Tesla	In-Fusio
ABC	cce	Esri Support	INFY
Accentmarketing	Cegedim Group Poland	Euro RSCG Chicago	Innodata
Axiom	certgate GmbH	Eurostar Global Electronics Ltd	Intelligroup
AEG Travel   American Express Travel	CGI	First Data	Inter Max Internet s.r.o.
Agenor Technology	CHESAPEAKE ENERGY INC	Forgeworks Group	iSoftStone
Air2Web	Ci&T	FreeStyleVentures.com	Itautec SA
Alcatel-Lucent	Citi	Fujitsu	ITC infotech
Alcosystems	Citrix Online	Galaxyz do Brasil	ITC Infotech India Ltd
ALLEGORITHMIC	Cybercom	Gemalto	ITOCHU Techno-Solutions Corporation
Allstream	Clean Power Systems	General Cable	ITware Kft.
ALSO artebis	CMC LTD	General Motors	Ixonos Plc
Altran Italia	CN Group	gen-i	Javna Wireless Software Solutions
Amor Group	Cognizant Technology Solutions	geniem	JP Morgan
Anakena Sollutions	collabera	Globant	KCC
Aorta	Compuzarve Ltd	Golden Gekko	klouddata labs
Appscend	ConnectinPrivate	Green Hills Software	Kryos
appsFX, LLC	Costco Wholesale	Grotech Ventures	Laboratorios Rovi
Appfortel LLC	Covidien	Harrisons	lechill
Argent Consulting	CPM Braxis Capgemini	Havs Media	Lemonade Marketing
ARJIS Communications	CSC	Hayes Management Consulting	LEO Pharma
AT&T	CSS Corp	HCL	Lewis Advertising Inc
Atlanta Clearing House	Cybage Software Pvt Ltd.	Healthagen, LLC	LexisNexis
Atos	cybercom	Hennes & Mauritz AB	LG CNS
AXA	Datamatics	Hexaware Technologies Inc.	Logica Business Consulting
Azetti Networks	De Data Pty Ltd	Highland Capital Brokerage	Logicalis Singapore Pte Ltd
B. Braun Melsungen AG	Dell	Hitachi Data Systems	LPL Financial
B3 Communications LLC.	Dem Pharma	Hospital & Healthcare Management	Lund University
Banco Citibank	Devoteam Consulting	HP	MACmobile
Barnes and Noble Digital Products	DISA	HSBC turkey	Macquarie Group
BB&T	Doctors.net.uk	Humana, Inc	Marks &Spencer
BBD	EDB Ergogroup	IBM	Mastek Ltd.
Belgacom	Edwardsville Intelligencer	Ideanesia	McKesson Provider Technologies
Bhurawala Motors	eHealth Media	IDS Infotech	Medco

Survey Participants (Continued)			
BJL	EJC Computing	iGATE Patni	MF Global
Bladonmore	Elsevier Health Sciences	imatics Software GmbH / Apps2Go GmbH	Milestones
Bluedome	Eltel Networks A/S	Indra Sistemas	Mindsizzlers, LLP
BMJ Group	emc	InfiCaretech	MindTree Ltd.
BP Berau Ltd.	Emerson Fortune	Infocentric Research	UnitedHealth Group
mobiOne	Praetorian Services PLC iNc.	SKY Italia	UST Global
Modis	PrimeShare	Sneezing Dragon Business & IT Consultants, LLC	Valtech
Morningstar UK	Profitbird.nl	Sole Prop	ValueLabs
Motorola Solutions	Protected Mobility	SQLI	VanceInfo
MPG Bel	Providence Equity	SRA International	Vanguard
MphasIS	PT Carrefour Indonesia	SSM	Veber Partners
NAGRAVISION	Puur IT	Staples Inc.	vEkaSoft
NAVTEQ	Pyramid IT Consulting inc	Steria	Verpura GmbH
ncs hub	QEEs	Studio2C	Vifor Pharma
Ness Technologies	Quest Diagnostics	Suncor Energy	Vision Objects
netbiscuits	Qvantel	SUSE,	vita-X
Nextel	RealDolmen	Talyst, Inc	VolvoIT
new toronto group	RIM	Teamstudio	Walgreens
NIIT Technologies	SAGE Publications Ltd	Teleca	Walmart
NNIT	SAIC	Telvent	WellDoc, Inc.
NOKIA	Samsung SDS	Teradata	Wincor Nixdorf
novartis	Sapient	thomson reuters	Wipro Technologies
N-square	Sears Holdings Management Corporation	Tieto	Wunderman
OLM Group Ltd	SHI	Titan systems	Xavient Information Systems
OMV Petrom	SHN	TJX Companies	Zensar Technologies
Orange	SIEMENS	Tonse Telecom	Zoraly Solutions
OTTO GmbH & Co KG	Silk Outsourcing Ltd	Travelport	zorgbeheer
Patni Computer Systems	Simfonics	trippelk ab	
Photon Infotech	Singletrack LLC	Trusterra	
Politec SA	Sita Software S.A.	T-Systems China Ltd.	