RESEARCH REPORT

Evaluation of Intranet Development Opportunities U.S.

Evaluation of Intranet Development Opportunities, U.S.

INPUT®

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CUSTOM PROJECTS

For Vendors–analyse:

- Market strategies and tactics
- Product/service opportunities
- Customer satisfaction levels
- Competitive positioning
- Acquisition targets

For Buyers–evaluate:

- Specific vendor capabilities
- Outsourcing options
- Systems plans
- Peer position

OTHER SERVICES

Acquisitions/partnerships searches

Abstract

The Intranet phenomenon has taken many IT vendors by surprise. As vendors rush to integrate Intranet functionality into their products and to provide Intranet services, the need to ascertain the plans and requirements of users is critical.

This report provides:

- Analysis of 105 U.S. users' Intranet usage patterns, future plans, applications, use of services and budgeting issues

- A breakdown of the Intranet-related opportunities open to IT vendors

- A forecast of the U.S. Intranet market, 1997-2001.

Analysis is presented by users' current stage of Intranet development: those without, and building Intranets. Coverage includes users' motives for building Intranets, their use of external Intranet development services, the effect Intranets will have on their existing systems, and budgeting issues.

Internet/Intranet Technologies &
Solutions Program

Evaluation of Intranet Development
Opportunities, U.S.

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Introduction

A

Objectives and Scope

The Intranet phenomenon is unique in the IT industry for being genuinely user-driven as opposed to vendor-driven. As such, it has caught many IT vendors by surprise. With the acceleration of development cycles inherent in the new wave of IT represented by the Internet and Intranets, vendors need to catch up rapidly with market development to stay ahead of the competition and to be able to meet user requirements.

This report attempts to identify the opportunities open to IT services vendors in the Intranet market by measuring aspects of current and future Intranet development, with particular attention to:

- Use of external Intranet services

- Patterns of Intranet development and usage

- Concerns about and obstacles to Intranet development

- Intranet budgeting issues

B

Research Methodology

INPUT interviewed 105 large U.S. companies during March 1997. Exhibit I-1 shows the sample breakdown by industry sector.

Exhibit I-1

Sample by Industry

Industry	% of Sample
Process manufacturing	19
Insurance	16
Discrete manufacturing	15
Retail	12
Banking and finance	10
Wholesale	7
Services	4
Transportation	3
Communications	2
Utilities	2
Healthcare	1
Other/not named	9

Sample: 105   *Source: INPUT*

This report defines four categories of interviewees according to their stage of Intranet development:

- "Intranet Owner"—company had already built an Intranet

- "Intranet Builder"—company was in the process of building an Intranet

- "Intranet Evaluator"—company was in the process of making a decision whether or not to build an Intranet

- "Intranet Rejector"—company had considered and decided against building an Intranet

The above descriptors (with and without the "Intranet" prefix) are used throughout this report to indicate the type of respondents under discussion. Exhibit I-2 shows the sample breakdown by these descriptors.

Exhibit I-2

Sample by Intranet Status

Category	Description	% of Sample
Owners	Organisations already with an Intranet	28
Builders	Organisations building an Intranet	31
Evaluators	Organisations considering an Intranet	27
Rejectors	Organisations who have considered and rejected an Intranet	14

Sample: 105 *Source: INPUT*

The survey sample was designed to limit the number of Intranet Rejectors interviewed to avoid the sample being overloaded with that category of respondent. All of the analysis presented in this report relates to individual, or pairs of categories, not to the entire sample.

C

Report Structure

- Chapter II—Executive Summary, presents a summary of the key findings of this report, plus French Intranet market forecasts

- Chapter III—Platform Usage, shows the hardware and operating system platforms used for Intranets

- Chapter IV—Motives for Intranet Development, analyses users' reasons and motivations for developing Intranets

- Chapter V—Effect of Intranet on Existing Systems, discusses the priority given to Intranets relative to existing IT, future impact of Intranets on existing systems, and levels of integration

- Chapter VI—Use of Intranet for Critical Data and Applications, shows use of Intranets for sensitive data and critical applications

- Chapter VII—External Intranet Services, analyses current and future use of Intranet services, importance of services, satisfaction with services and vendors used, and preferences for service procurement

- Chapter VIII—Beyond Development: Applications and Outsourcing, discusses applications used, their procurement and management, and user intentions to outsource Intranets

- Chapter IX—Extent of Intranet Deployment, shows the size and scope of current Intranets, departmental takeup, and levels of external connectivity supported

- Chapter X—Intranet Budgeting, analyses sources of Intranet budgets, how budgets are allocated, and roles played by different organisational functions in Intranet activities

- Chapter XI—Obstacles to Intranet Development, discusses the problems faced by user organisations in building their Intranets

- Chapter XII—Intranet Rejectors, presents the reasons given by users for deciding against Intranet development

- Chapter XIII—Market Forecasts, presents U.S. market sizes for Intranet services and software from 1997 to 2001

- Appendix A—Survey Questionnaire (Intranet Owners)

- Appendix B—Survey Questionnaire (Intranet Builders)

- Appendix C—Survey Questionnaire (Intranet Evaluators)

- Appendix D—Survey Questionnaire (Intranet Rejectors)

D

Related INPUT Reports

Other INPUT reports which address topics related to the subjects discussed here include:

- *Using the Internet for Business Operations, Internet Opportunities Program, 1995*

- *Notes' Survival in the Intranet-Enabled Corporation, Internet Opportunities Program, 1996*

II
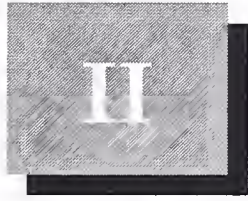
Executive Summary

A

Introduction

Intranets represent a significant break from IT tradition. Throughout the history of IT, all new waves of development have been vendor-led; for example, mainframe, minicomputer, PC LAN and client/server uptake has been essentially supply-driven. Intranets, however, are the result of ad hoc development within user organizations. Early Intranets were informal and unplanned, often built 'after hours' using freely-available software, and did not rely on established user/vendor relationships.

Until 1995, many if not most IT vendors were unaware of this new development taking place on some of their customers' sites. During that year, however, news of the Intranet phenomenon was spread quickly by an IT and business press eager to pick up on the latest hot story. By late-1996, any product vendor who had not made an Intranet-related announcement was beginning to look behind the times.

Now it is the turn of IT services vendors to catch up in the Intranet market.

The problem facing services vendors is that the legacy of 'guerrilla' Intranet development remains—Intranets are widely perceived as low-cost, low-effort developments, which implies low need for external services. Use of services is in fact moderate, but shows no sign of increasing in the short term—organizations who have not yet started Intranet development do not appear more likely to use services than organizations that built their Intranet in 1996 or earlier.

The current situation of Intranets among U.S. organizations is as follows:

- Intranets are still most commonly used for low-value and general-purpose horizontal applications

- The primary motive for Intranets is to extend the reach of IT within the organization, not primarily to save costs, as is commonly perceived

B

Intranets are Still in Early Phases of Use

Most large companies which currently have, or are building Intranets use them for relatively simple applications. Static information sharing (the equivalent of 'brochureware' on the Internet) is the most common use of Intranets, as evidenced by the following findings:

- The most common use of Intranets is for internal information distribution

- The most common reason for building an Intranet is ease of access to all types of information

Exhibit II-1 shows the phases that INPUT defines for Intranet use, starting with the 'classic' first Intranet applications and ending with total replacement of legacy platforms and applications with Intranet equivalents. While this last phase represents the logical extreme of Intranet development, INPUT does not expect this phase to be reached by many, if any, medium-sized or large enterprises by 2000.

Exhibit II-1

Phases of Intranet Use

Phase	Description	Examples
One	Static information distribution, mostly administrative	Company policy documents, staff and telephone directories and visitor registers
Two	Business unit and departmental information sharing	Product plans, financial data, customer service records and sales contacts
Three	Group collaboration	Project management, groupware and desktop conferencing
Four	Integration of existing systems and applications with Intranet	Web-enabled datawarehouse, Web front end to legacy databases, product design and live customer service querying
Five	Replacement of legacy systems with Intranet equivalents	All current applications

Source: INPUT

1. Intranets are Most Commonly Used for Information Distribution

Exhibit II-2 shows the top three uses for which Intranets are currently adopted. Note that internal information distribution is not named as a primary application by all users. Other primary applications include general office applications and collaborative application. As an Intranet does not necessarily have to be built around the model of the Web, a primary use of Intranets can be email, although this does not by itself constitute an application.

The most commonly used applications are all low-value or general-purpose, horizontal applications. Department-specific applications on Intranets are used by lower proportions of respondents, for example: sales force automation (37%) and purchasing / inventory (23%).

Exhibit II-2

Applications Used (Intranet Owners and Builders)

Sample: 62   Source: INPUT
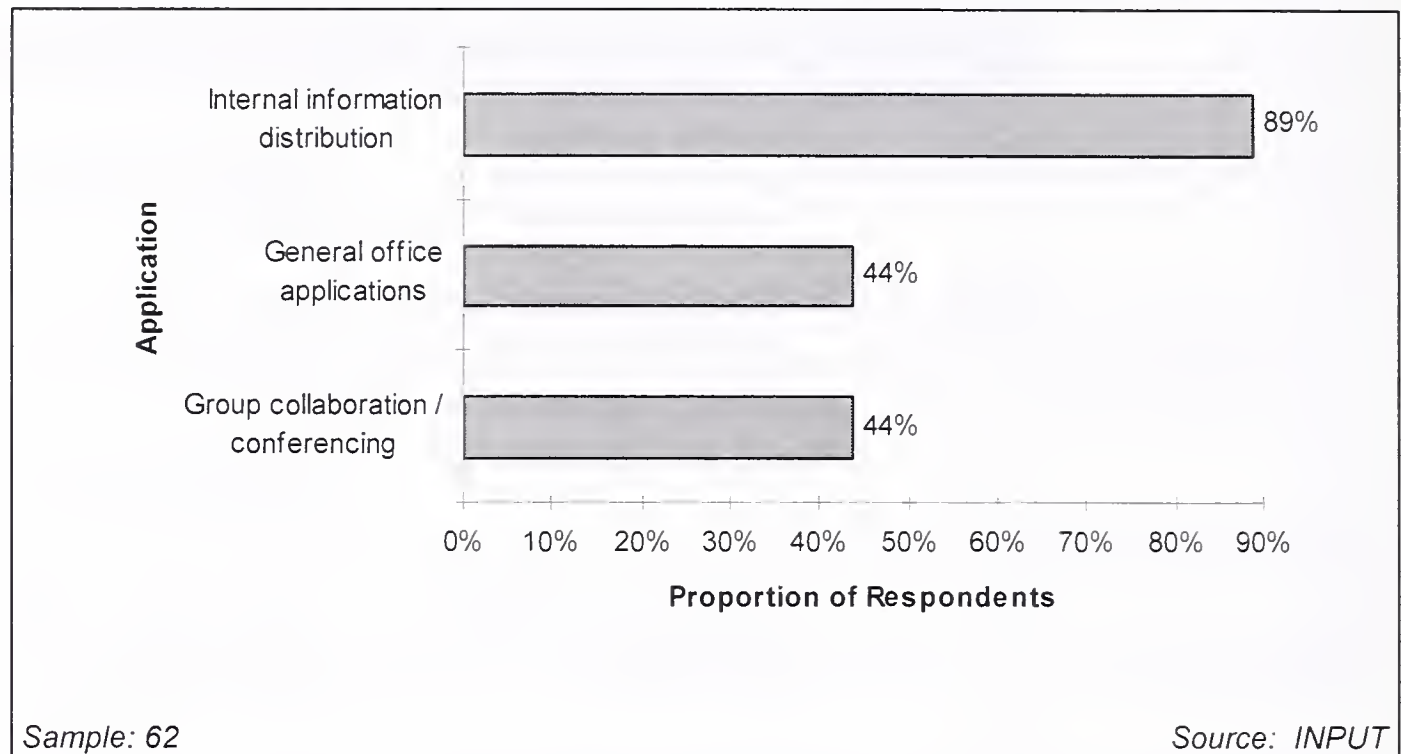
C

Intranets are Built to Extend IT as well as to Save Costs

It has been widely reported that Intranets are being developed primarily for cost-saving reasons. This is not the case. Exhibit II-3 shows the top three reasons given by Owners and Builders for building their Intranets. Only one in three respondents named cost saving as a primary reason for building their Intranet (the fifth most commonly stated reason).

Exhibit II-3

Reasons for Building an Intranet
(Intranet Owners and Builders)

Ease of access to all types of information — 66%

Integrating existing systems — 42%

As an ongoing infrastructure upgrade — 40%

Reason (y-axis)

Proportion of Respondents (x-axis): 0% 10% 20% 30% 40% 50% 60% 70%

Sample: 62   Source: INPUT
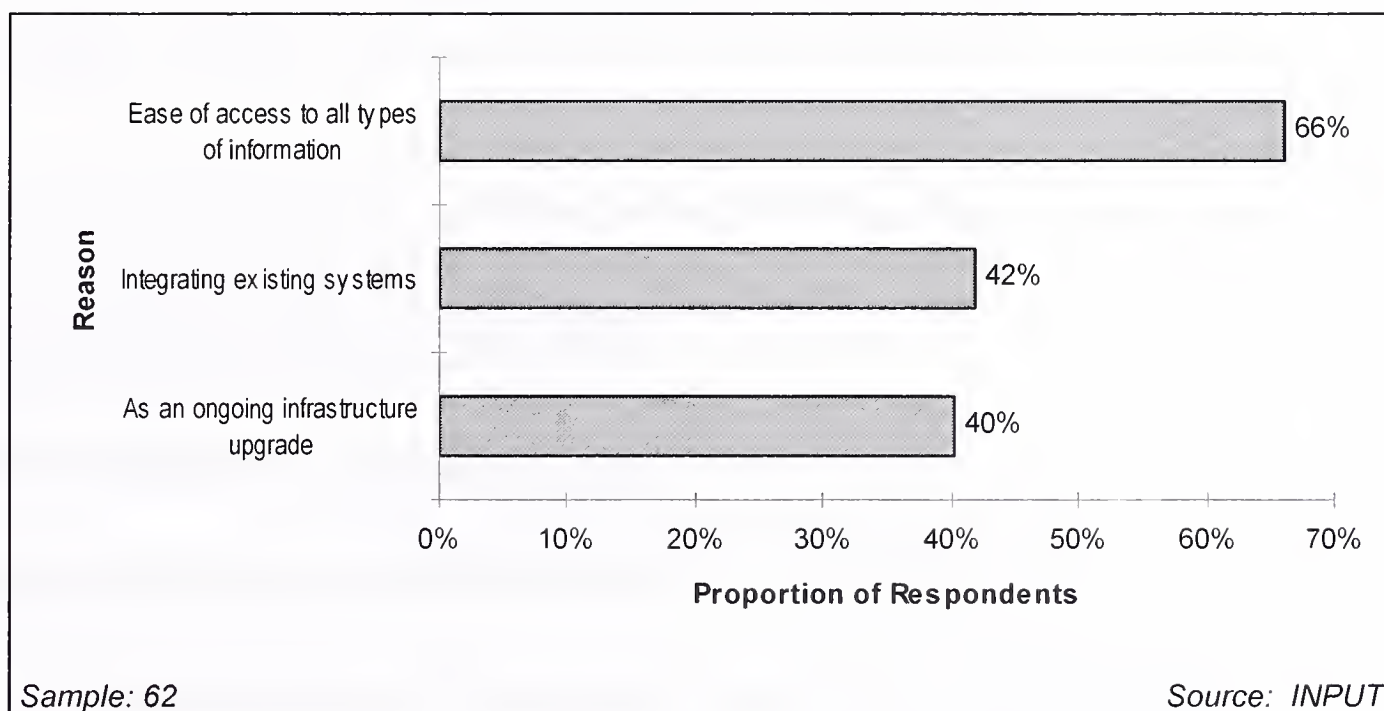
Intranets will undoubtedly save cost in information distribution. For example, a large U.S. services company interviewed in depth for INPUT's report *Using the Internet for Business Operations* (1996) stated that it more than offset the cost of researching, designing and developing its Intranet by distributing its company policy documents electronically instead of on paper. Similar cost-saving case studies have been reported elsewhere.

Even within information distribution, however, some extra cost is incurred by adopting an Intranet. As information can be updated dynamically, users may have higher expectations of its timeliness, reinforced by their experiences of visiting Web sites on the Internet which are updated frequently. Meeting this heightened expectation will incur additional resource requirements. Furthermore, the near-zero cost of distributing information over an Intranet may make it more difficult to justify infrequent updates.

Despite the potential cost savings of Intranets, the most common reasons for building an Intranet as shown in Exhibit II-4 are all about extending the reach of data and applications, within and without the organization.

Due to the high level of commonality between Intranet and Internet, distributing and viewing information across the two environments is not a complex issue. For this reason, Intranets are a natural choice for organizations wishing to extend communication beyond the corporate network.

The different types of external connectivity supported are shown in Exhibit II-5. Surprisingly, only around half of users connect to the public Internet through their Intranet, although INPUT expects this proportion to increase as Intranet security solutions become widespread and use of the Internet is incorporated into working practices and employee guidelines.

Exhibit II-4

Connectivity Supported (Intranet Owners and Builders)
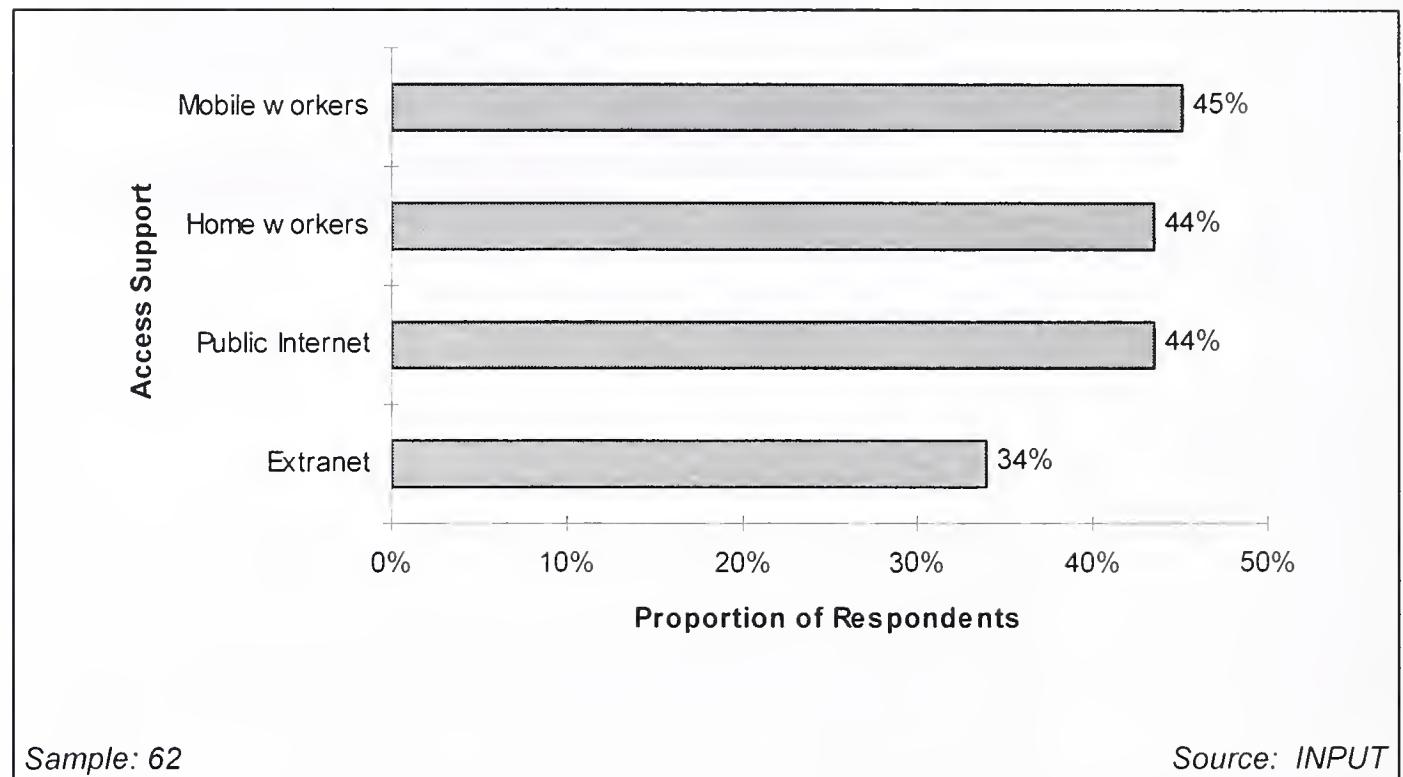
Sample: 62   Source: INPUT

Nearly as many users support Extranet as Internet connectivity. (An Extranet is the connection of two or more geographically separate Intranets over the public Internet. Extranets are most commonly seen as a way to connect customers, suppliers and partners.)

While the market for full-function Extranet applications is still embryonic, not all users require such applications. Simple access to another organizations' Intranet qualifies as an Extranet, even though what can be done thereafter may be limited, for example: simple file transfer. INPUT expects full commerce Extranet applications to increase rapidly from 1998, as such standards as SET achieve market acceptance.

Nearly half of users can support mobile or home workers via their Intranet. There are still significant problems involved in providing remote workers with access to applications and data held on an Intranet, primarily related to bandwidth, although these will be alleviated by technology advances (such as ADSL and cable modems). Support for home workers will increase further due to additional, non-technological factors such as environmental car use legislation and maternity issues.

D

Vendor Opportunities Lie in Under-Used and Integration Services

1. Use of Intranet Services is Low, and No 'Killer Service' Currently Exists

Use of external Intranet services by U.S. organizations is low, and there is currently no singularly popular Intranet service. Exhibit II-5 depicts the most common external services used by organizations with or building an Intranet, and shows that similar proportions of organizations use the most popular services.

Exhibit II-5

External Intranet Services Used
(Intranet Owners and Builders)

Sample: 62   Source: INPUT
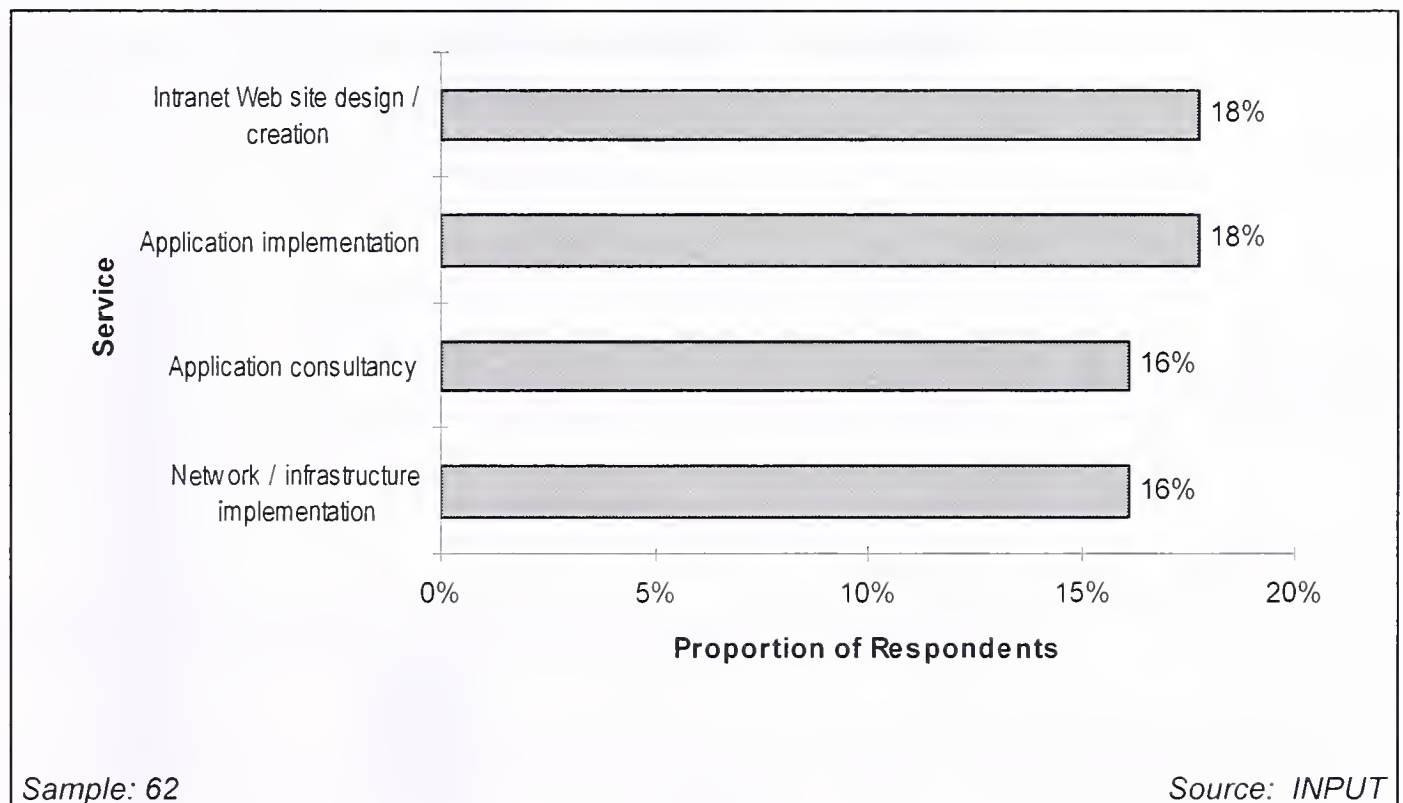
The most popular services are used by only 18% or fewer of respondents, indicating that Intranets are still often built in-house. There is little difference in usage levels between most services, although three services—education and training, integration of Intranet with existing systems, and business strategy / benefits consultancy—fare particularly poorly, each having been used by only five percent of users.

In addition to much Intranet development being conducted in-house, there is relatively little intention to look externally for either applications or network operation. Among companies with or building an Intranet:

- Most applications are developed in-house (73%). Custom development and packaged applications are used in equal measure.

- Most (82%) do not intend to outsource their Intranet.

2. Intranets are Currently Additive, But will Integrate with Existing Systems

Intranets are currently additive to existing systems, but two thirds of users believe that between 1997 and 1999, their Intranet will integrate into the existing IT infrastructure. A quarter believe their Intranet will begin replacing existing systems. Most of those who anticipate displacement believe it will be a gradual process: few organizations are planning for rapid obliteration of current systems (Exhibit II-6).

Exhibit II-6

Effect of Intranet on Existing Systems Over Two Years
(Intranet Owners and Builders)

Sample: 62   Source: INPUT
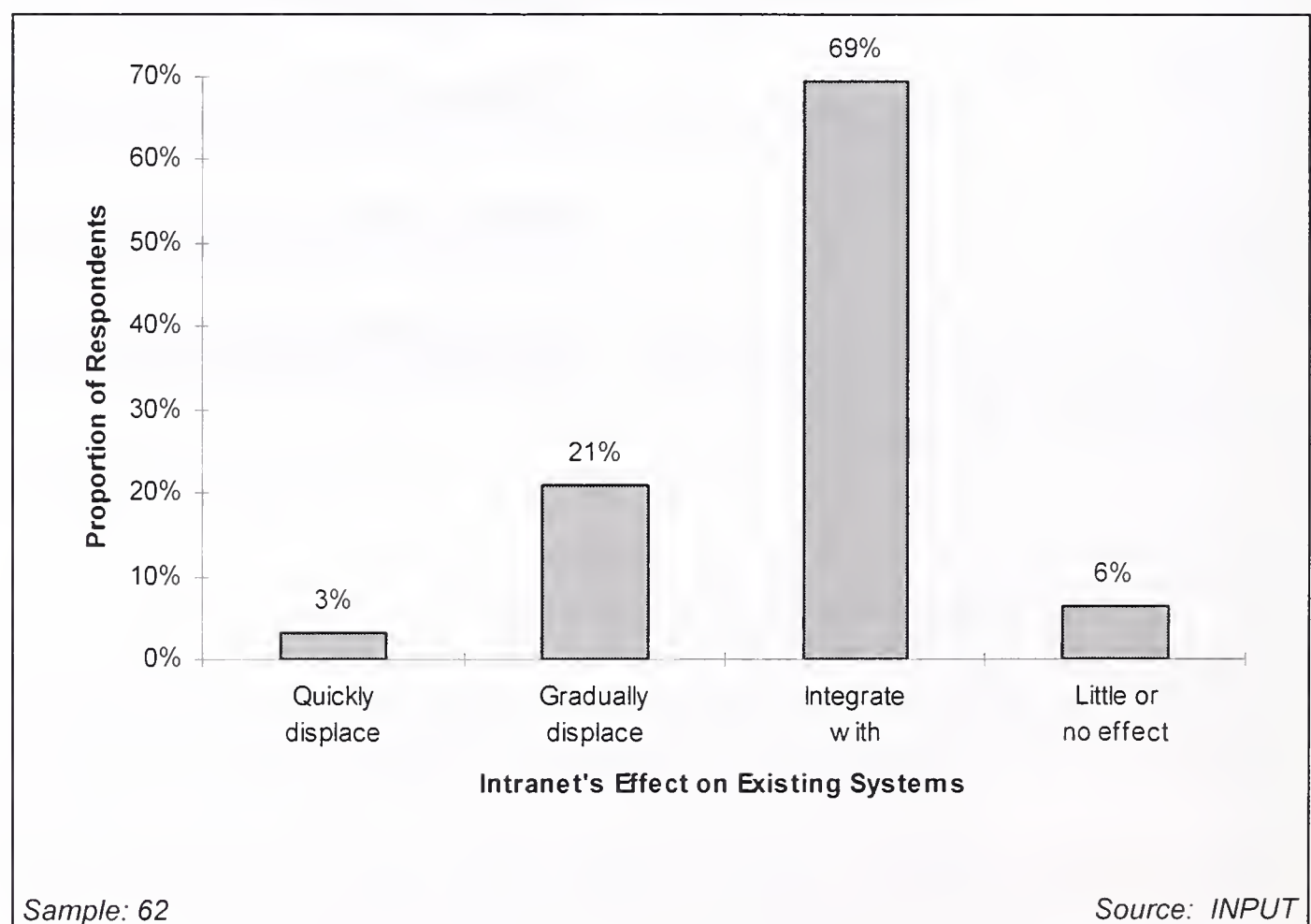
The most commonly anticipated scenario within two years is that Intranets will integrate with existing IT. Exhibit II-7 shows the levels of integration currently achieved and expected in that timeframe. Very little integration is apparent currently, reflecting Intranets' beginnings as off-line, 'out of hours' projects. By 1999, integration of Intranets and current systems will have increased greatly, with users who expect little integration in the minority.

Exhibit II-7

Levels of Integration Between Intranet and Existing Systems, 1997 and 1999 (Intranet Owners and Builders)

Average 1997: 2.5
Average by 1999: 3.9
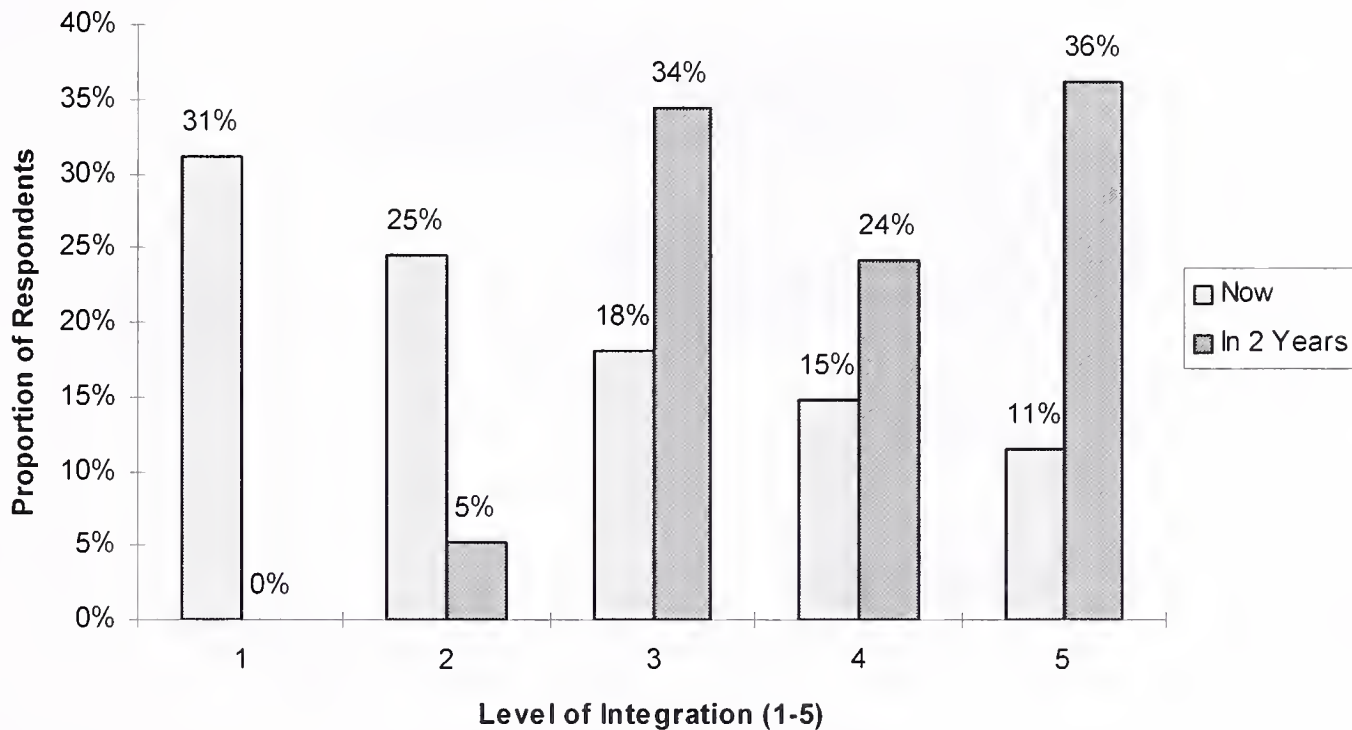
Sample: 61   *Source: INPUT*

E

IS Department Remains Biggest Target for Intranet Services

IS departments currently take the most active role in both initiating and playing a major ongoing role in Intranet development, followed by end users and business unit managers.

CEOs and Financial Directors play a lesser role in terms of initiating and furthering Intranet activity, but due to their relative influence within an organization they should be targeted for Intranet services. Business unit managers should be targeted for application-specific Intranet solutions.

Exhibit II-8

Roles Played in Intranet Activities
(Intranet Owners and Builders)
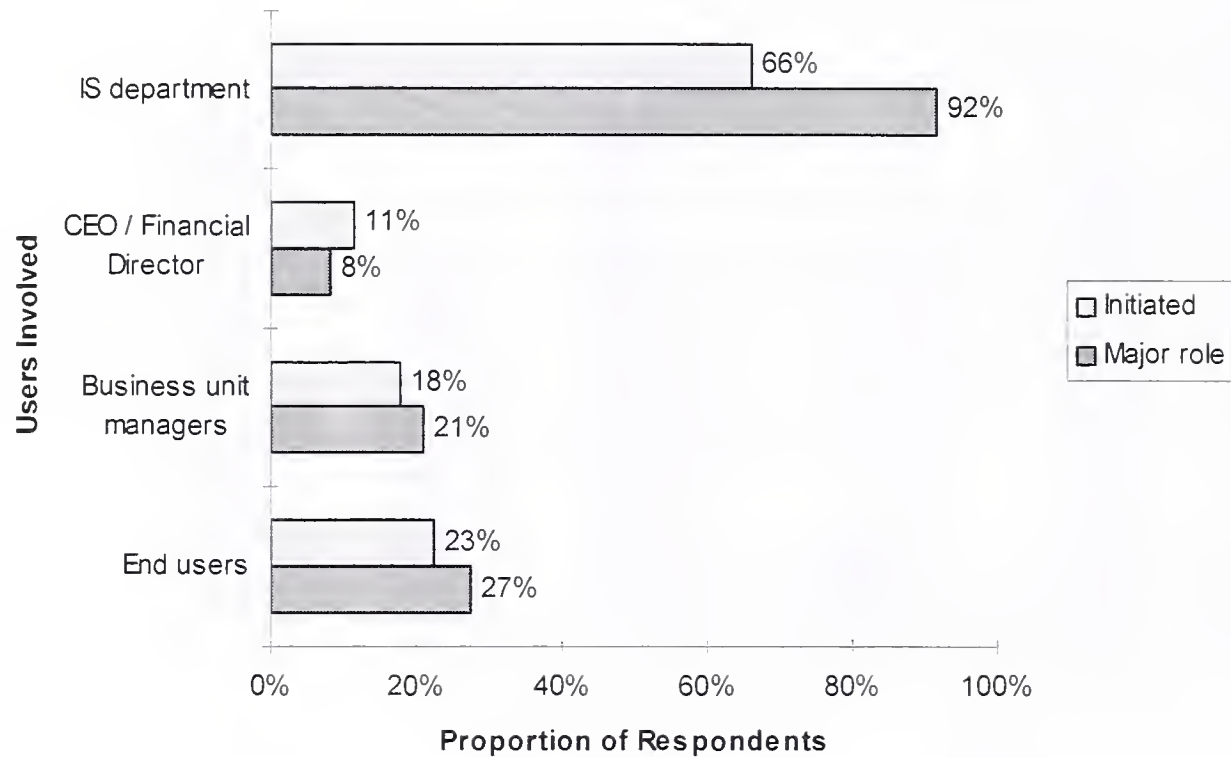
Sample: 62   *Source: INPUT*

The largest proportion of Intranet budgets is set by corporate headquarters and provided by a central IT budget, as is the case in around three-quarters of user organizations.

A common pattern of Intranet budgeting is for startup activities to be funded and conducted by IS, but thereafter shared regionally and functionally— benefiting departments, divisions and branch offices are expected to contribute towards Intranet budgets.

Exhibit II-9

Intranet Budget Sources (Intranet Owners and Builders)

End users
13%

Business unit
managers
18%

IS department
68%

CEO / CFO
1%

Sample: 48   Source: INPUT
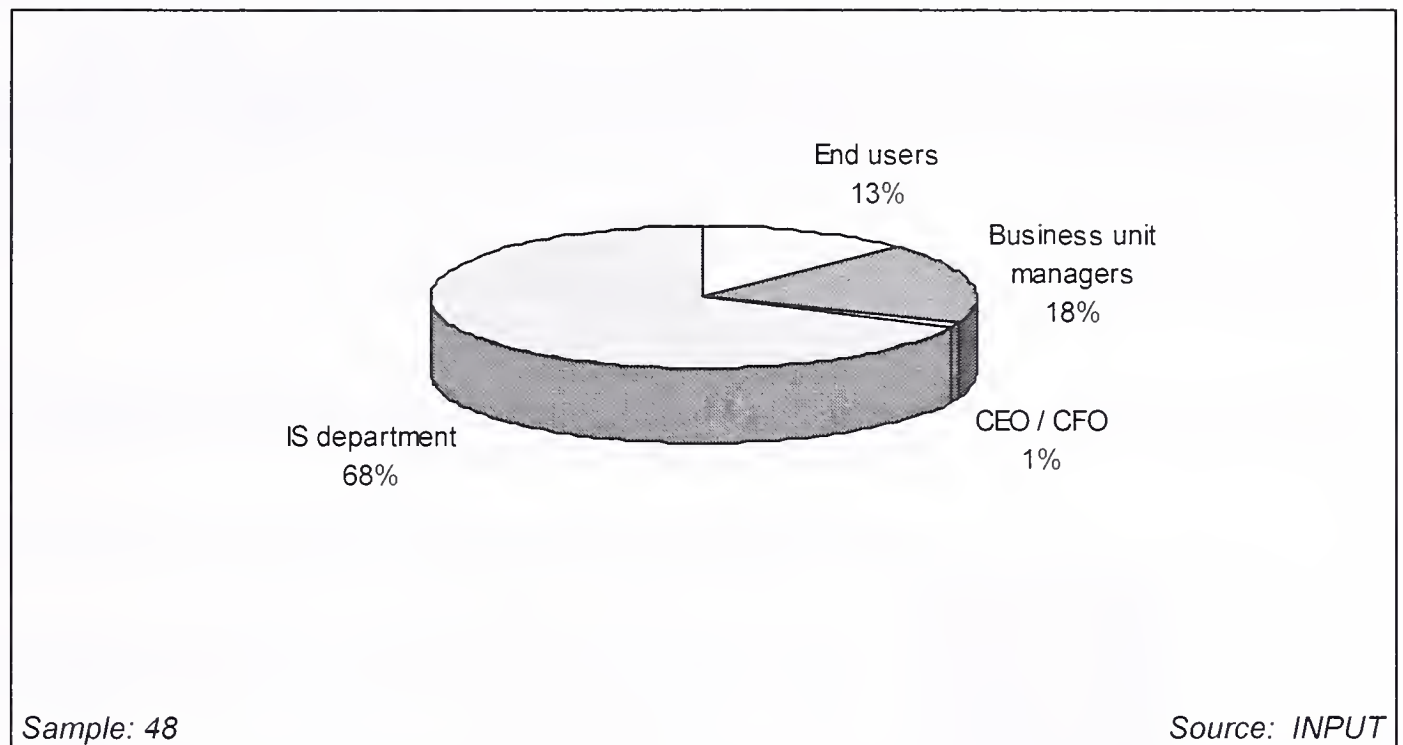
F

Recommendations

Exhibit II-10 presents a summary of the Intranet service offerings INPUT recommends based on the findings of this project.

Exhibit II-10

Recommended Intranet Service Offerings

Service Offering	Examples
Integration—services and products designed to bring existing, non-Internet servers and databases into an Intranet	*Network infrastructure*—implementation of TCP/IP throughout the organization at desktop and server level, installation and configuration of Web clients and servers, integration of Intranet-enabled NOSs with legacy NOSs (for example: UNIX, Windows NT or IntraNetware with SNA or Netware) *Web front-ending*—to allow Web clients to access existing, non-Intranet applications using Intranet protocols such as HTTP and IIOP (for example: using Java Beans, Oracle WebForms or SCO Tarantella) *Data formatting*—to enable servers to receive, store and supply information in Internet and Intranet formats (for example: HTML and IIOP) *Intranet design*—to design and structure a navigable Intranet site or sites, including conversion of existing company documents to HTML
Transition—services and products designed to migrate users from current systems to Intranet-specific solutions	*Network infrastructure*—implementation of TCP/IP throughout the organization at desktop and server level, installation and configuration of Web clients and servers, migration of legacy NOSs to Intranet-enabled NOSs (for example: SNA or Netware to UNIX, Windows NT or IntraNetware) *Application migration*—re-engineering of legacy applications to the Intranet platform (for example: using Java), conversion of object models from legacy to Intranet (for example: OLE or OpenDoc to AxtiveX or IIOP) *Data migration*—reconfiguration of existing server-based data from existing formats to Intranet format (where no add-on is available to generate HTML dynamically from the server) *Intranet design*—to design and structure a navigable Intranet site or sites, including conversion of existing company documents to HTML *Environmental services*—decommissioning mainframe systems where appropriate
Security	*Network and transport security*—Intranet border and departmental firewall solutions, network access control, 'single sign-on', Intranet business continuity *Data security*—encryption, user authentication, information access management, Intranet business continuity
Education and training	*Education*—case studies, technology demonstrations, seminars and conferences *Training*—user training, IS developer training, developer workshops

Source: INPUT

G
Market Forecasts

Exhibits II-11 and II-12 show the change in size of the U.S. markets for Intranet-related professional services and systems integration between 1997 and 2001.

Exhibit II-11

U.S. Intranet Professional Services Market, 1997 and 2001

CAGR: 26%

12.5

4.9

Source: INPUT
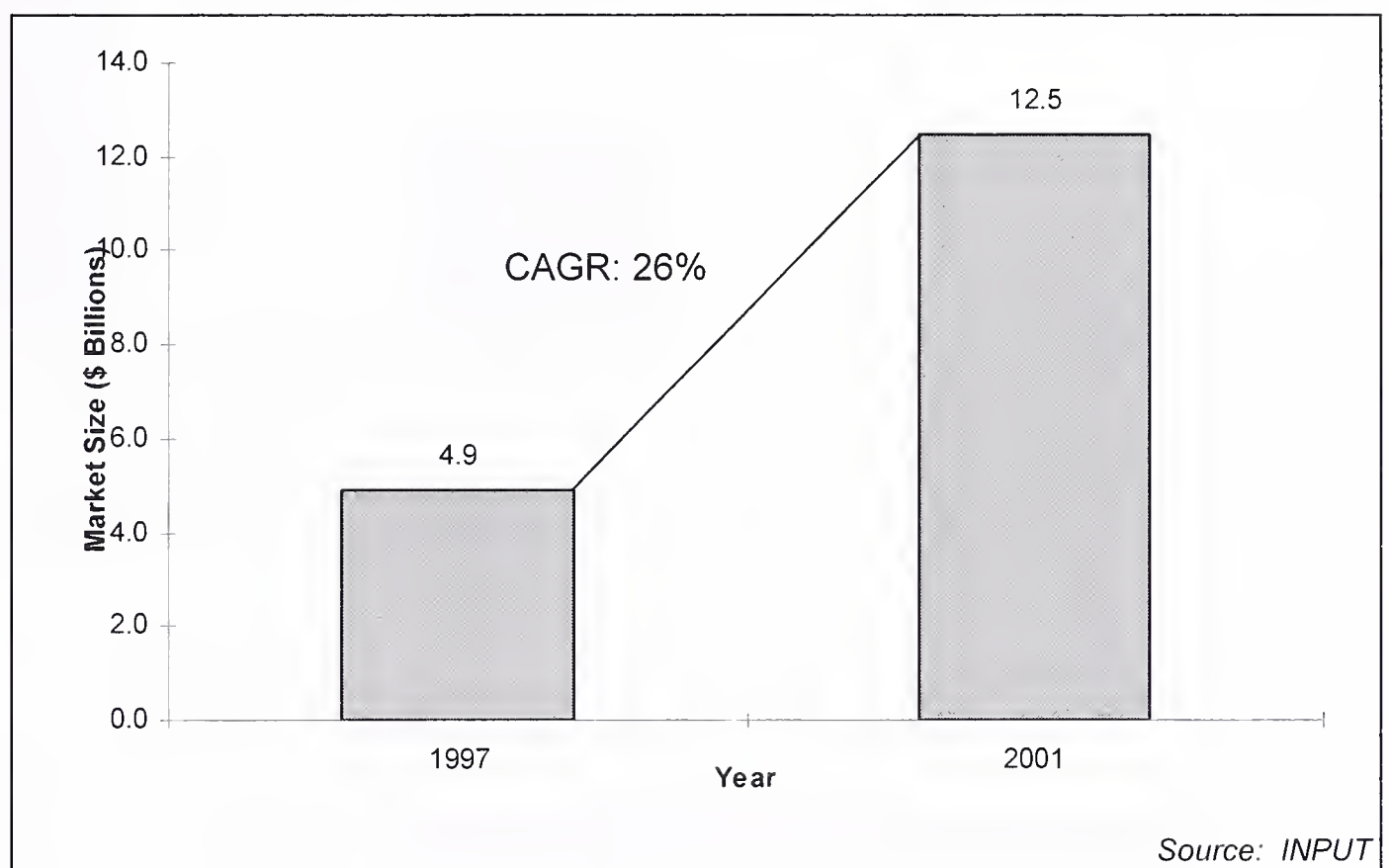
Exhibit II-12

U.S. Intranet Systems Integration Market, 1997 and 2001

Source: INPUT

III
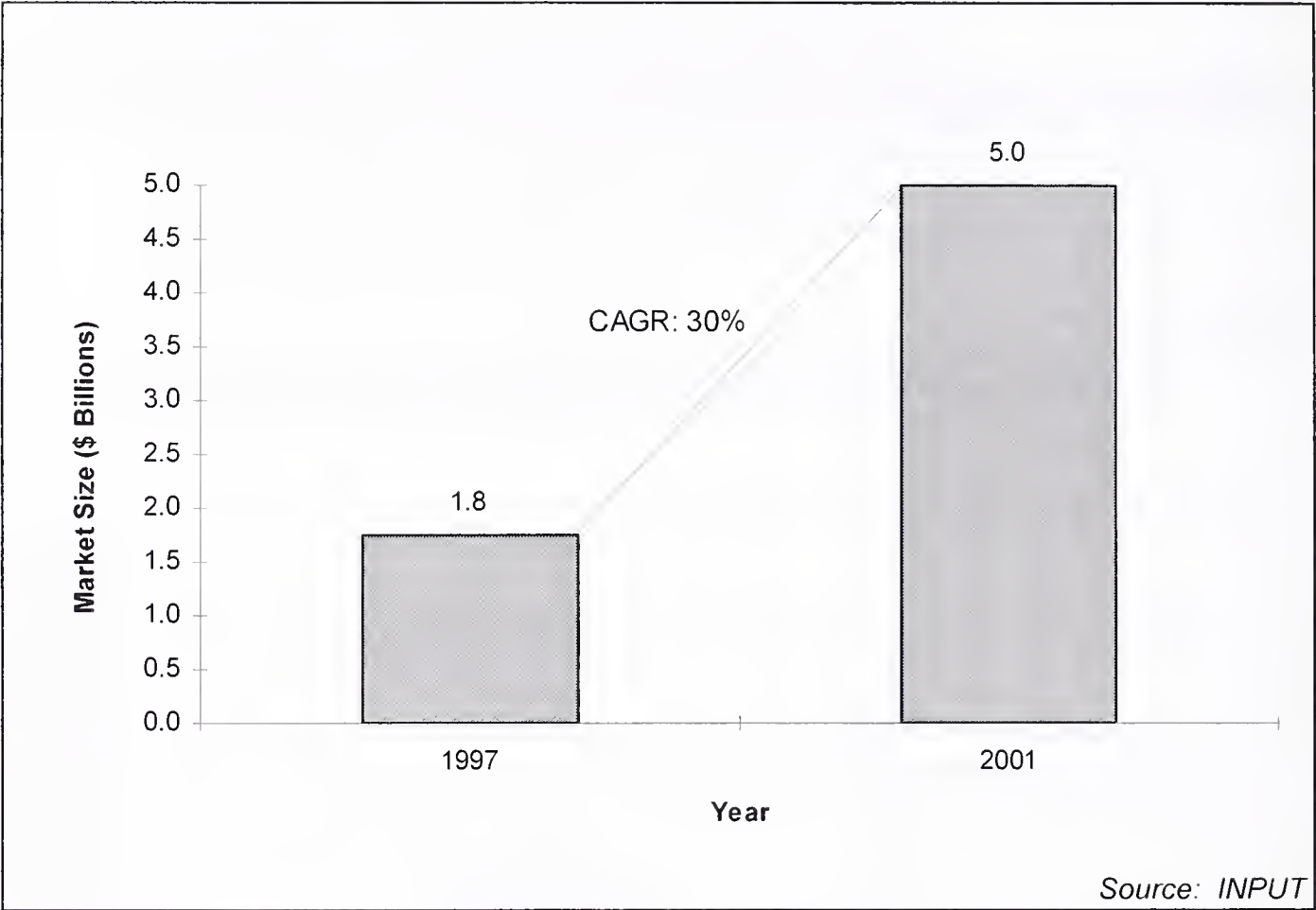
Platform Usage

A

Client Operating Systems

Exhibit III-1 shows the primary client platforms that Intranet Owners and Builders currently use to access their Intranet. As would be expected. most (90%) use Windows-based PCs as a primary Intranet access client, followed by UNIX. A small body of respondents claimed to be using Network Computers, and INPUT expects this proportion to increase dramatically from 1998.

Exhibit III-1

Client Operating Systems Used for Intranet Access
(Intranet Owners and Builders)

Client Platform	Proportion of Respondents
MS Windows	90%
UNIX	19%
Apple Macintosh	13%
Network Computer	6%
X terminal	6%
OS/2	6%
Mainframe terminal	2%

Sample: 62   Source: INPUT
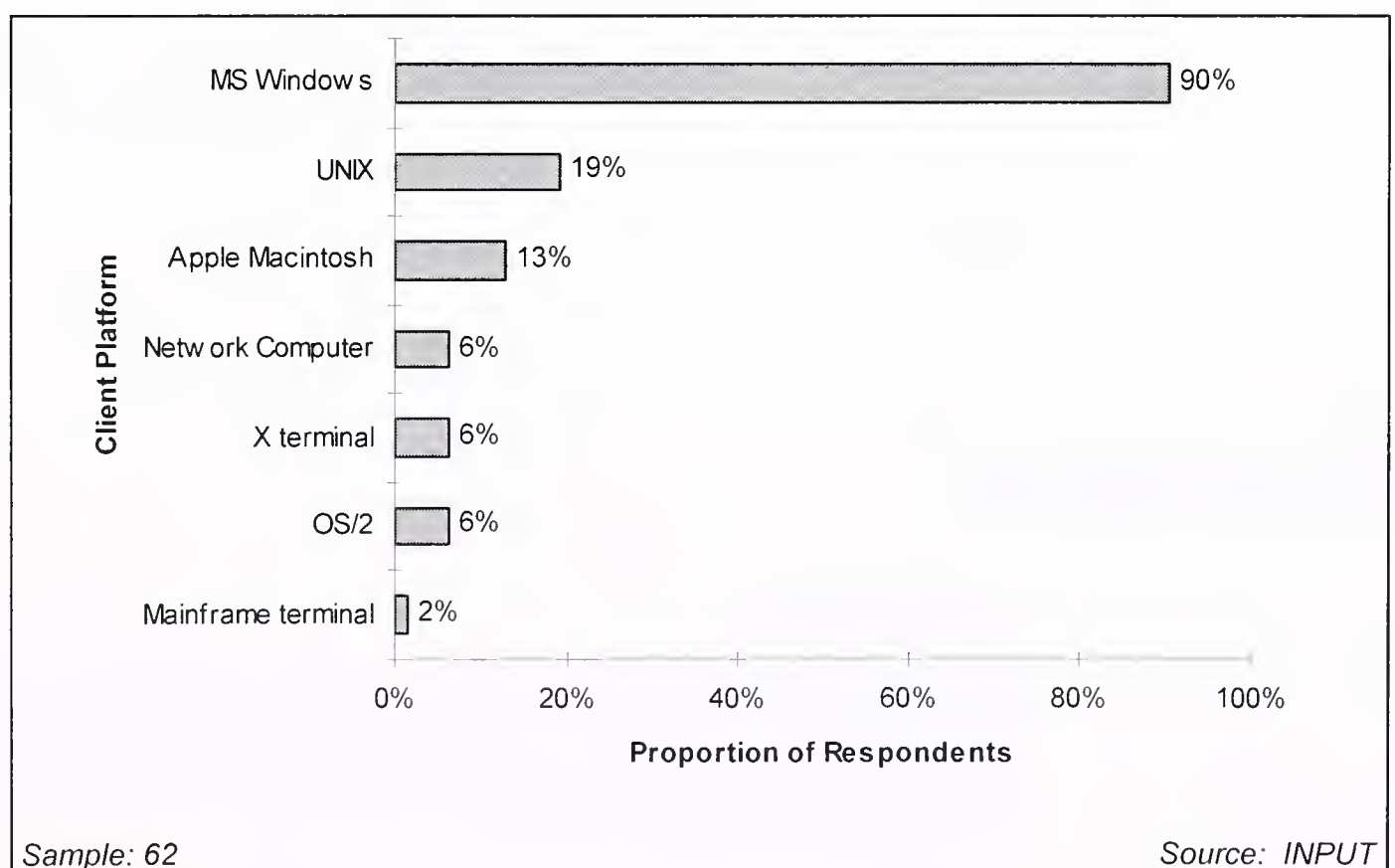
B

Server Operating Systems

Exhibit III-2 shows the server platforms on which Owners and Builders currently run their Intranet. Windows NT is the most popular server operating system, used by 73% of respondents, followed by UNIX, used by 43% (midrange and enterprise UNIX combined).

Exhibit III-2

Server Operating Systems Used to Run Intranet
(Intranet Owners and Builders)

Sample: 62   Source: INPUT
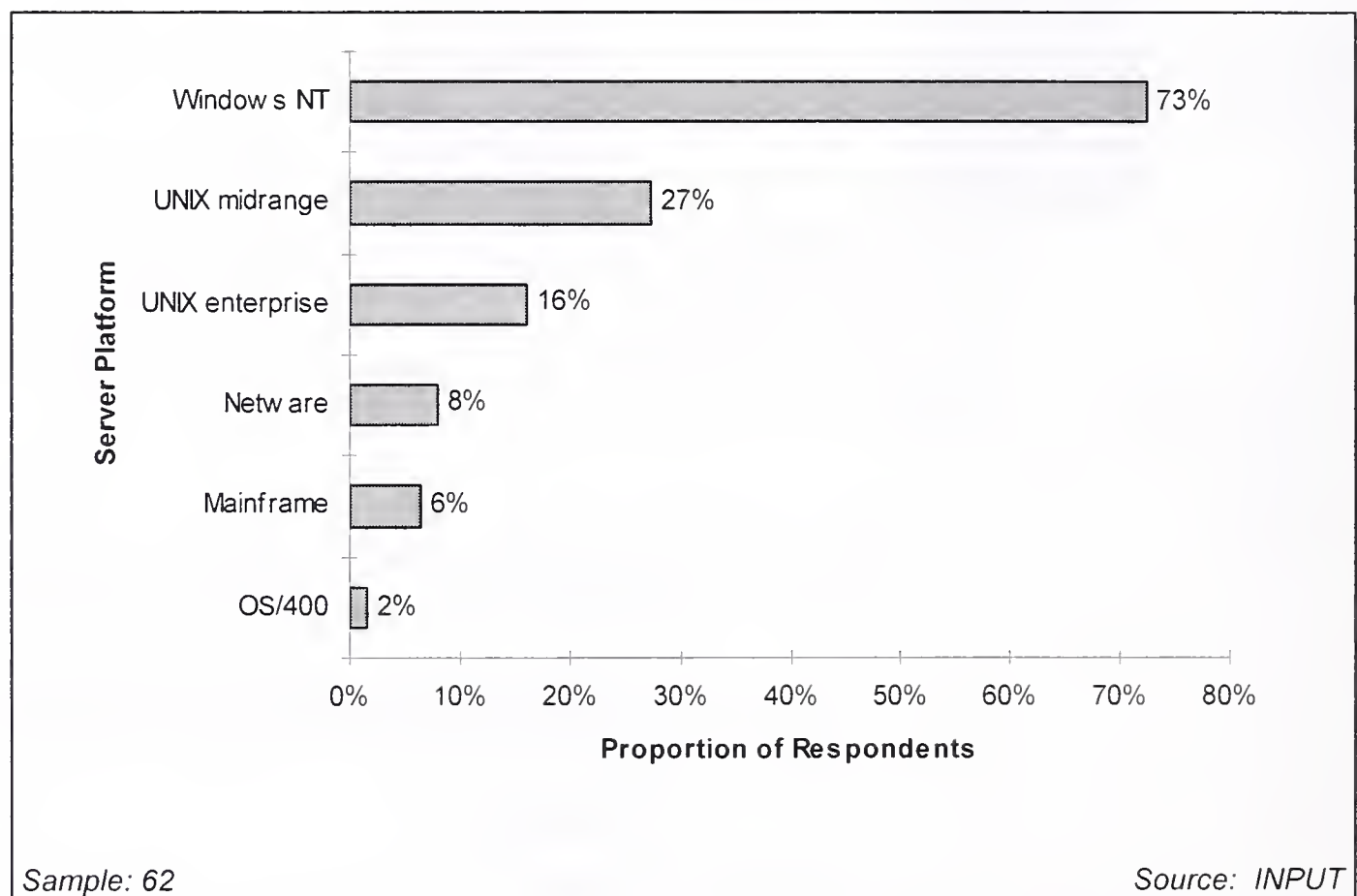
C

Intranet Platforms

1. Web Clients

Exhibit III-3 shows the Web clients used by Owners and Builders to access their Intranet. Netscape Navigator and Microsoft Internet Explorer are used by almost identical proportions of users, reflecting how Microsoft has caught up in the Web browser market.

Exhibit III-3

Web Clients Used for Intranet Access
(Intranet Owners and Builders)

Netscape Navigator — 68%

Microsoft Internet Explorer — 63%

Lotus Notes client — 6%

Microsoft Office — 5%

Novell Groupwise — 3%

Web Client (y-axis)

0% 10% 20% 30% 40% 50% 60% 70%

Proportion of Respondents

Sample: 62   *Source: INPUT*
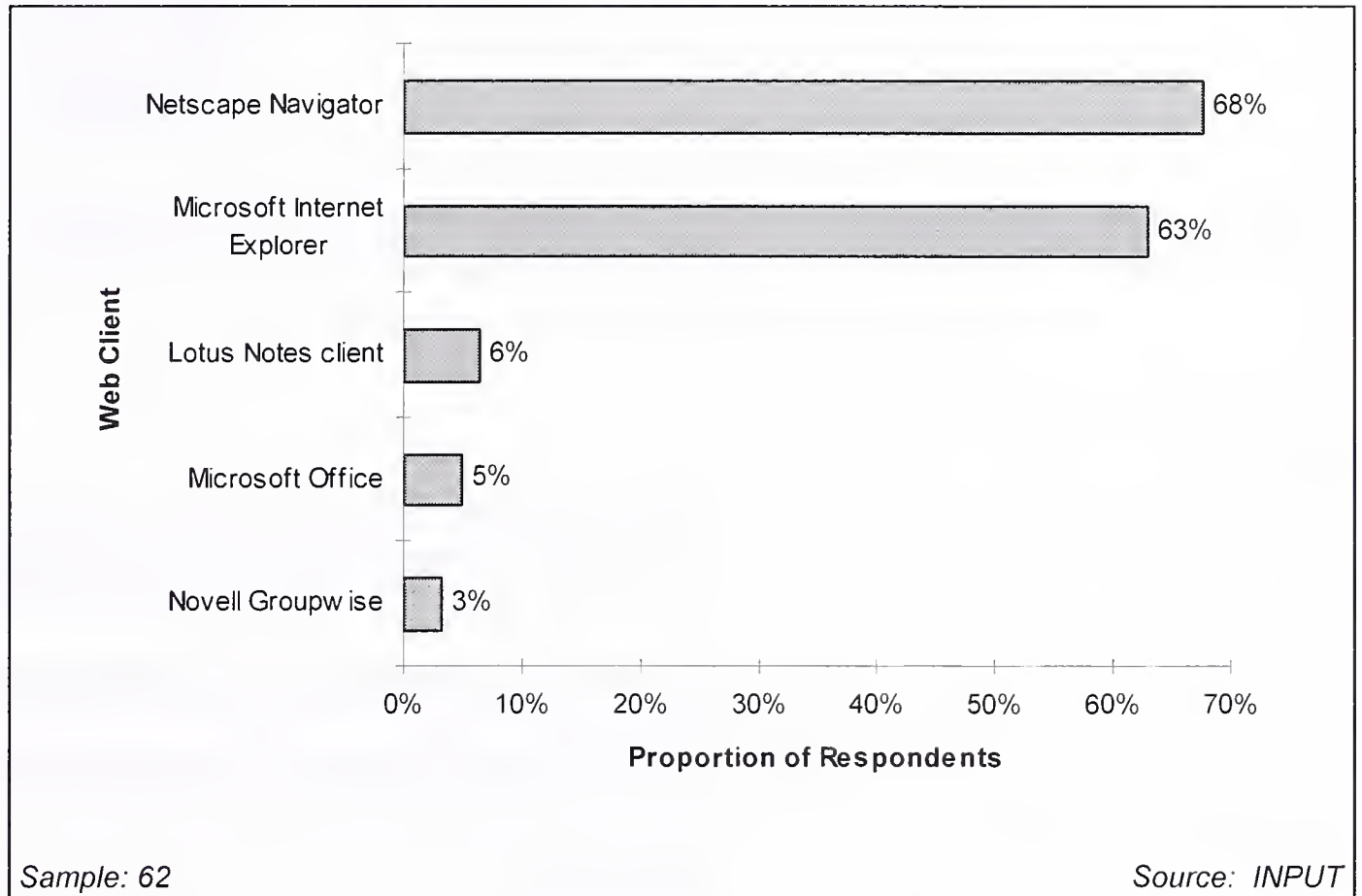
2. Web Servers

Exhibit III-4 shows the Web servers used by Owners and Builders to run their Intranet. As with Intranet Web clients, Microsoft and Netscape are used by near-equal proportions of users.

While 10% of respondents use Lotus Notes/Domino as an Intranet server, only three percent use the Notes client for primary Intranet access. This indicates that predictions of proprietary clients decreasing in use to be replaced by generic Web browser front-ends were correct—for Intranet applications, the default client is a Web browser, not an application-specific client.

Exhibit III-4

Web Servers Used to Run Intranet
(Intranet Owners and Builders)

Sample: 62   Source: INPUT

IV
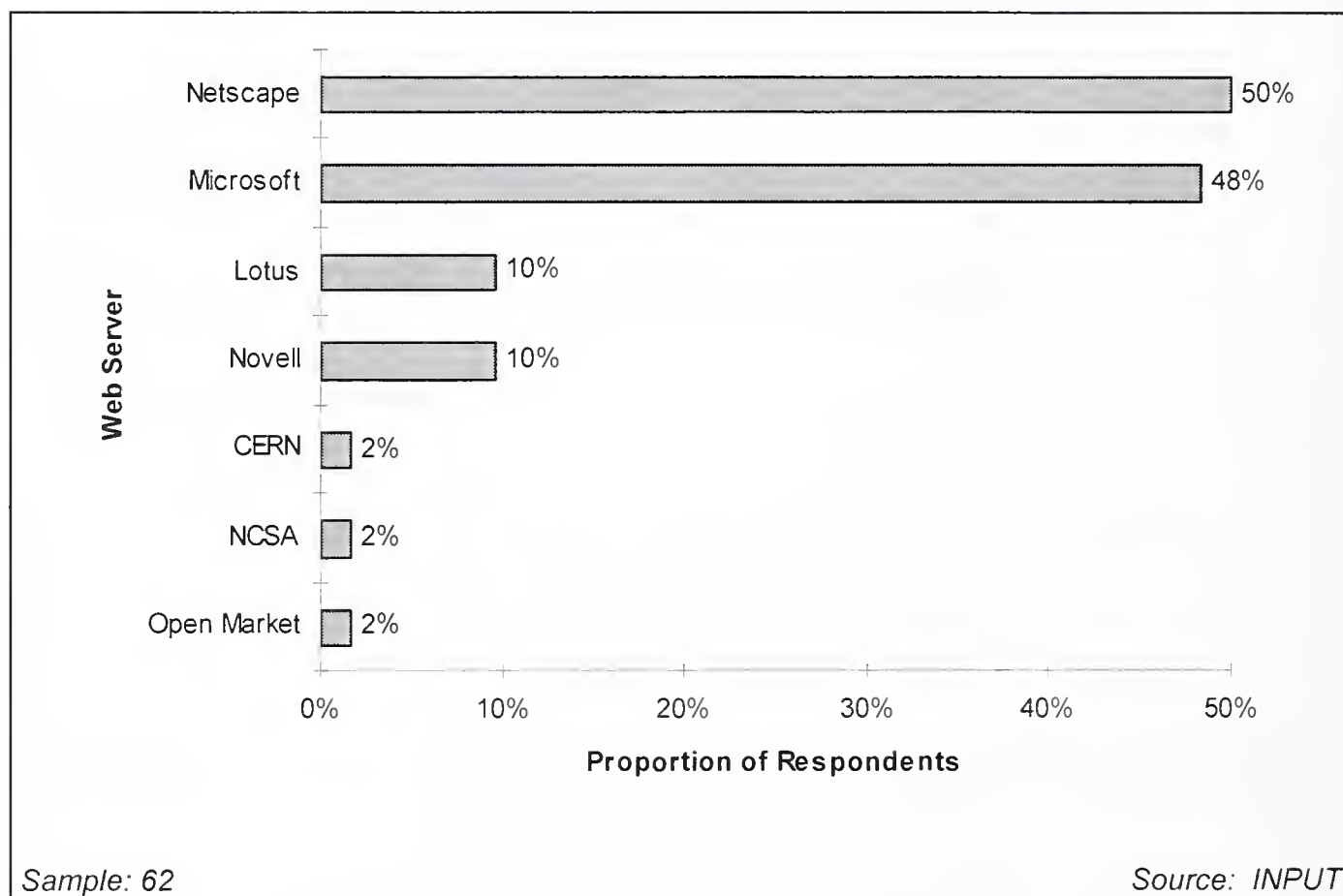
Motives for Intranet Development

A

Reasons for Building an Intranet

Exhibit IV-1 shows Intranet Owners' and Builders' reasons for building an Intranet; Exhibit IV-2 shows Intranet Evaluators' reasons.

Among all categories of respondent, the most common reasons for embarking on Intranet development include:

- "Ease of access to all types of information"—This potential benefit was among the first to be identified when Intranets entered the public eye in 1995, and is by far the most significant driver of Intranet development. Through the use of a consistent data and network environment, users expect to ease the process of unlocking corporate data

- "Integrating existing systems"— Intranets differ from existing networks in that the architecture on which they are built is not owned or controlled by a single vendor (as opposed to Netware or SNA for example). As all Intranet vendors share the same basic network platform (TCP/IP plus the overlying Internet services such as HTTP, FTP and telnet), a user's Intranet environment remains compatible at the network level regardless of vendor. This openness brings with it the potential to connect existing systems and applications from different vendors that, without such a neutral network architecture, were previously incompatible

Exhibit IV-1

Reasons for Building an Intranet
(Intranet Owners and Builders)

Ease of access to all types of information — 66%

Integrating existing systems — 42%

As an ongoing infrastructure upgrade — 40%

To prepare for future technology / applications — 37%

Cost-saving — 37%

Enabling access to / from outside world — 35%

Business process re-engineering — 35%

Integrating with current or future Web front ends — 31%

Uniformity / standardisation of platforms — 26%

To solve a business problem — 8%

Reason (y-axis)

Proportion of Respondents (x-axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%)

Sample: 62   *Source: INPUT*

Exhibit IV-2

Reasons for Building an Intranet (Intranet Evaluators)

Reason	Proportion of Respondents
Ease of access to all types of information	61%
Integrating existing systems	39%
To prepare for future technology / applications	36%
Enabling access to / from outside world	36%
As an ongoing infrastructure upgrade	29%
Uniformity / standardisation of platforms	25%
Business process re-engineering	21%
Cost-saving	18%
Integrating with current or future Web front ends	14%
To solve a business problem	4%

Sample: 28   *Source: INPUT*

B

Influence of Year 2000 on Intranet Development

It has been widely suggested that Intranets may, at least partially, solve the Year 2000 problem (Y2K). Given the now-urgent need to address Y2K, it has been suggested that users may be developing Intranets sooner than they would have had Y2K not been an issue, in an attempt to beat the critical deadline. The principle behind this suggestion is that by building Intranets now, users avoid the double spending on major IT upgrades of Y2K in the short term and Intranets in the medium term.

INPUT's findings suggest this is not happening. Exhibits IV-12, IV-13 and IV-14 show the influence that Y2K is having on users' development or consideration of Intranets. The response is overwhelmingly negative: overall, Y2K appears not to be a significant factor in driving Intranet development and cannot therefore be recommended as a major strategic element in IT vendors' Intranet services marketing.

Exhibit IV-3

Influence of Year 2000 on Intranet Development
(Intranet Owners and Builders)

Influence (1-5)

Average: 1.2

Sample: 60 Source: INPUT
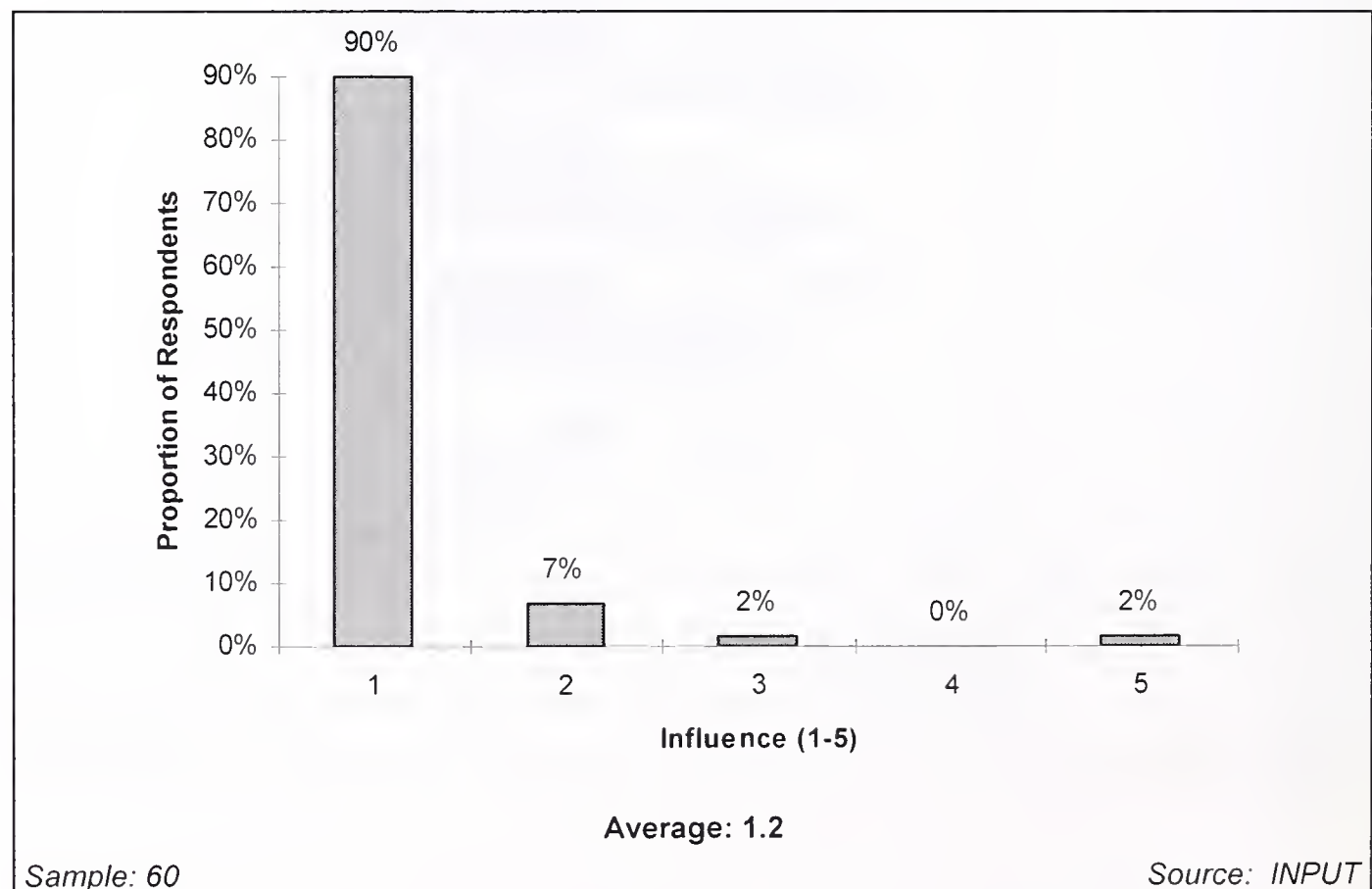
Exhibit IV-4

Influence of Year 2000 on Intranet Development
(Intranet Evaluators)

Influence (1-5)

Average: 1.4

Sample: 26   *Source: INPUT*

(Blank)

V
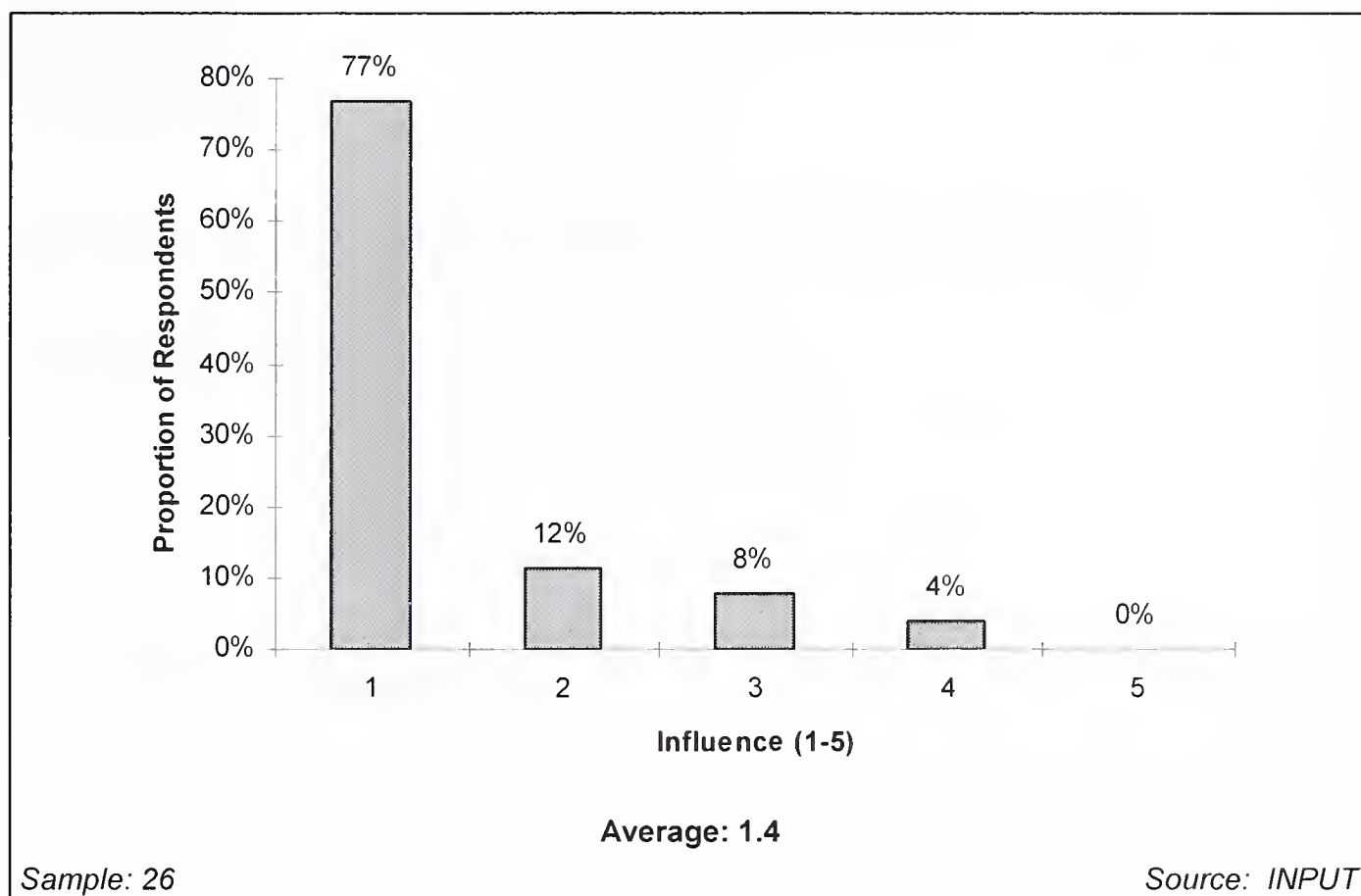
Effect of Intranet on Existing Systems

A
Priority of Intranet Relative to Existing IT

Exhibit V-1 shows the priority that Intranet Owners and Builders respectively are giving to their Intranets compared with other areas of IT investment in three areas:

1. Implementation

2. Application development

3. On-going support

Each phase of operation follows on from the previous phase—an Intranet is built, then enhanced, then supported—so we regard implementation as the earliest phase and support as the latest phase.

Overall, Intranets tend to be given medium-to-high priority, although the priorities given to each phase are similar. Slight differences exist in Intranet implementation, which appears to be given a high priority slightly more often than the other phases.

Exhibit V-1

Priority of Intranet Relative to Existing IT
(Intranet Owners and Builders)

Sample: 61   Source: INPUT
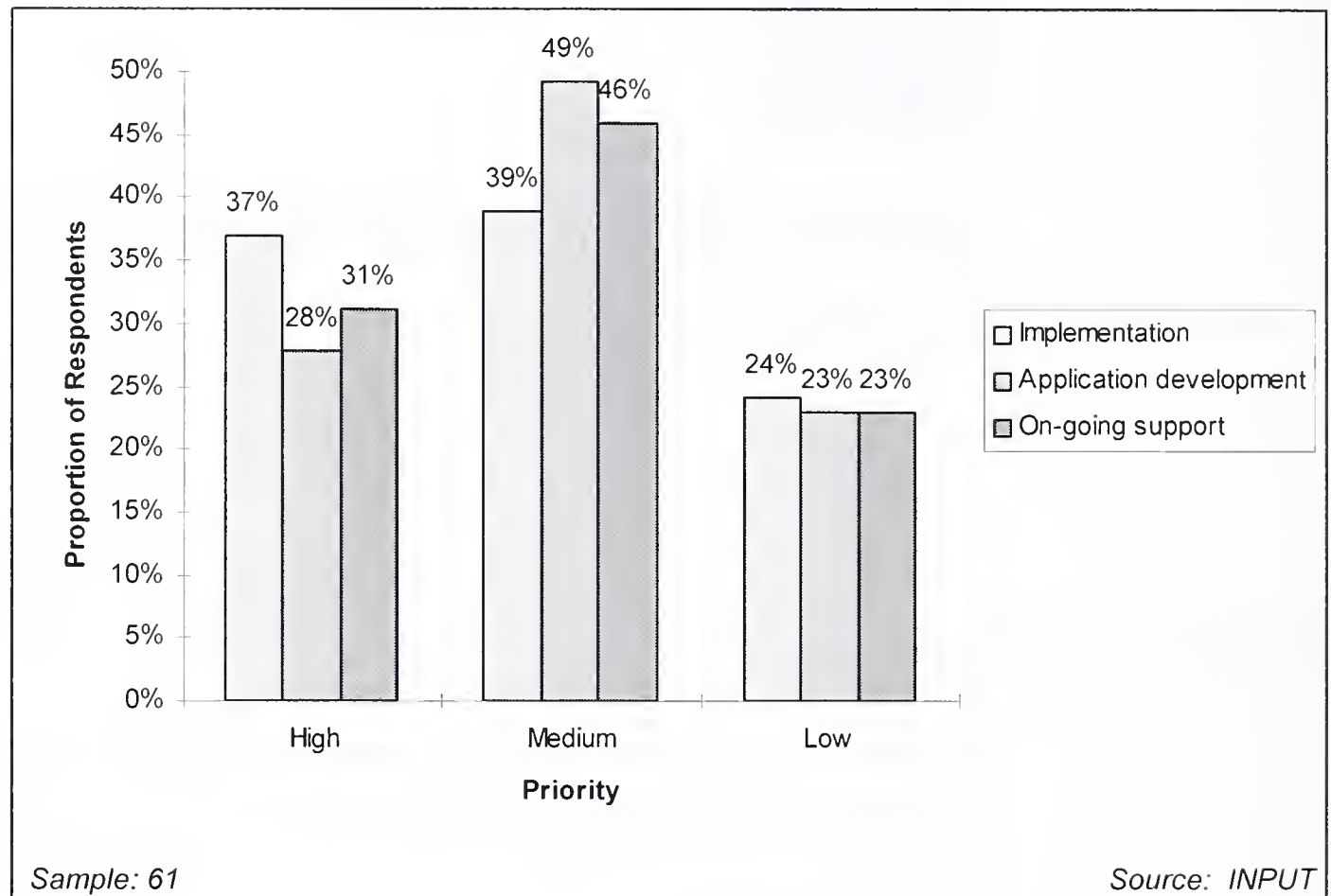
B

Effect of Intranet on Existing Systems By 1999

The views of respondents on how their Intranet will affect their existing IT systems between 1997 and 1999 are shown in Exhibits V-2 and V-3

Possible scenarios were:

- Intranet will quickly displace existing systems

- Intranet will gradually displace existing systems

- Intranet will integrate with existing systems

- Intranet will have little or no effect on existing systems

The pattern is the same for Owners, Builders and Evaluators. Almost no organisations anticipate a 'big bang' effect whereby their Intranet rapidly supplants existing systems. The most common anticipated effect is an integration of Intranets with existing systems.

Companies which had not started Intranet development were more likely to believe that their Intranet would have little or no effect on existing systems than were organisations who had started or completed development. The proportion of Evaluators who held this view, however, was still low, at under 20%.

For all categories of user, it is evident that promotion of Intranets as a quick or, in many cases, even a gradual replacement for current systems will not receive an enthusiastic response at this stage.

Exhibit V-2

Expected Effect of Intranet on Existing Systems, 1997-1999 (Intranet Owners and Builders)

Sample: 62   Source: INPUT
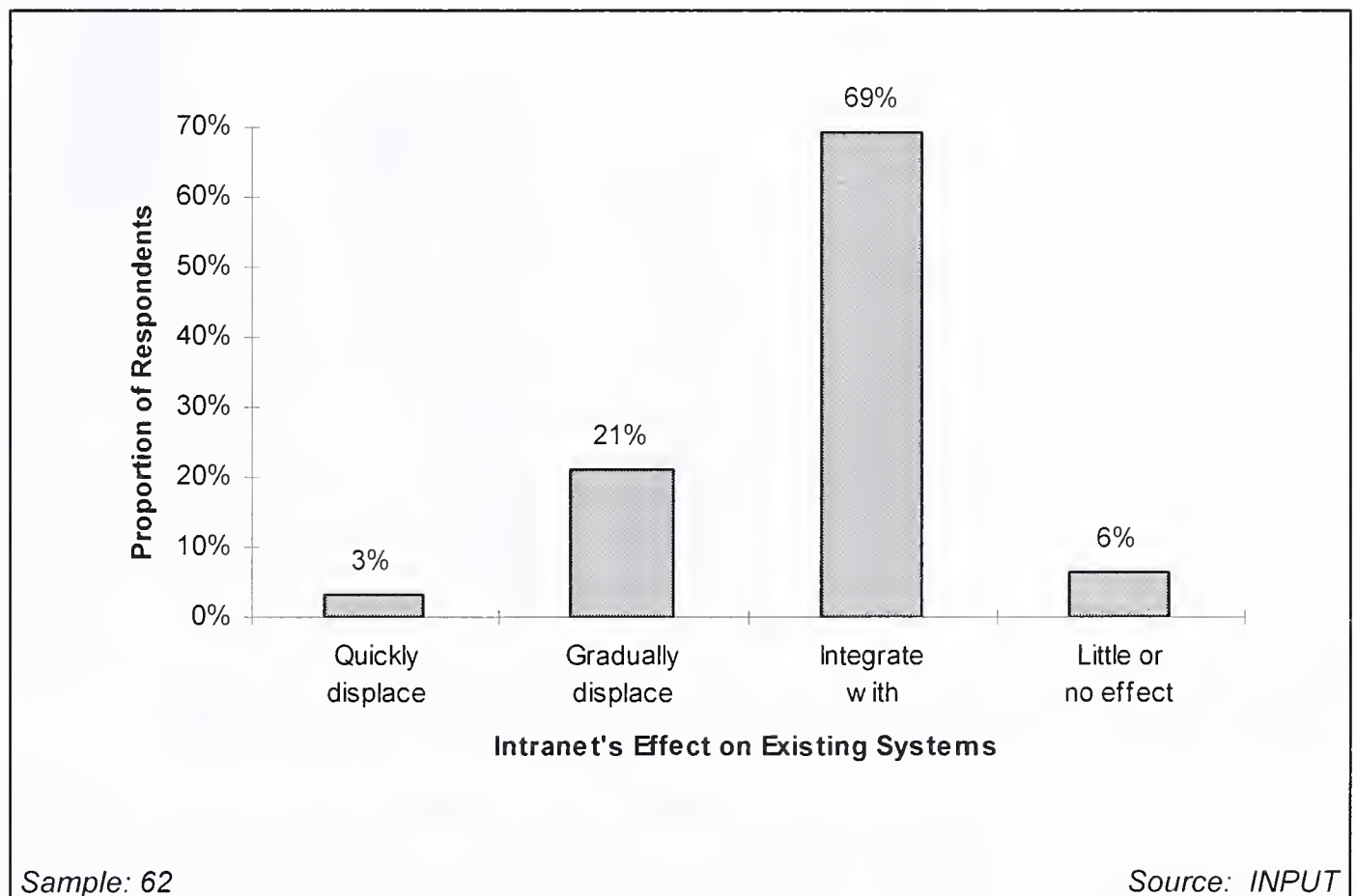
Exhibit V-3

Expected Effect of Intranet on Existing Systems, 1997-1999 (Intranet Evaluators)

Sample: 28   Source: INPUT
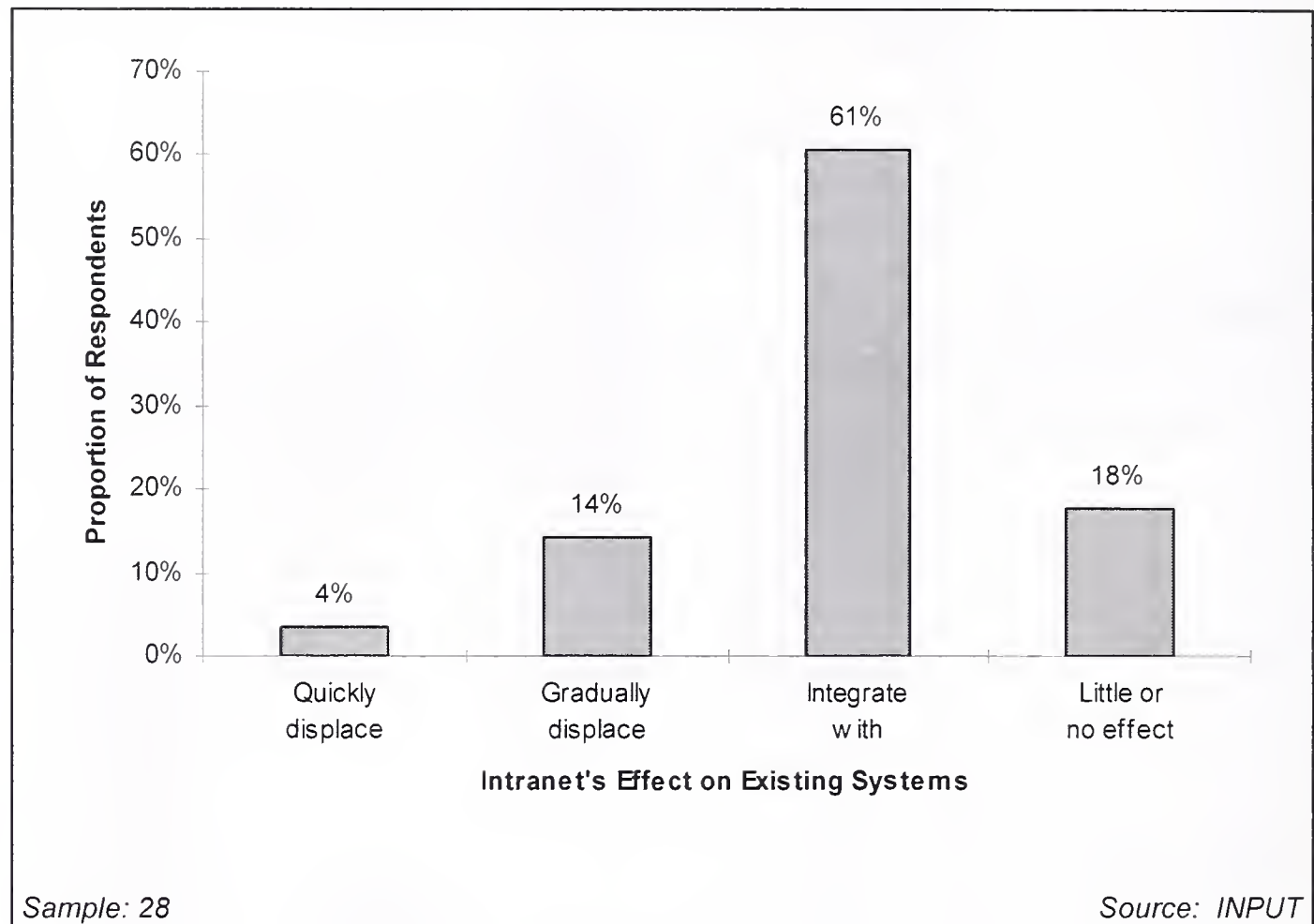
C

Integration of Intranet with Existing Systems By 1999

Exhibit V-4 shows how tightly integrated Owners' and Builders' Intranets are with existing systems now and what level of integration they expect to achieve by 1999. Exhibit V-5 shows the level of integration Evaluators would expect to achieve on implementation of an Intranet.

Intranets are currently only mildly integrated into existing networks (average level of integration: 2.5 out of 5), with over half of respondents rating their level of integration as very low (1 or 2 out of 5).

In time, however, Intranets are expected to be brought increasingly into the mainstream IT environment. By 1999, Intranet Owners and Builders expect to have achieved a considerably higher level of integration (nearly all respondents expect to have achieved a medium or higher level of integration).

The level of integration they expect to achieve by 1999 is comparable to the level of integration that Intranet Evaluators expect to achieve when they first implement their Intranets. relatively few Evaluators, however, expect to achieve a very high level of integration (a ranking of 5 out of 5).

There is a clear opportunity for system and network integration vendors to bridge the gap between the low integration of today to the medium-to-high integration users expect to attain by 1999.

Exhibit V-4

Levels of Integration Between Intranet and Existing Systems, 1997 and 1999 (Intranet Owners and Builders)
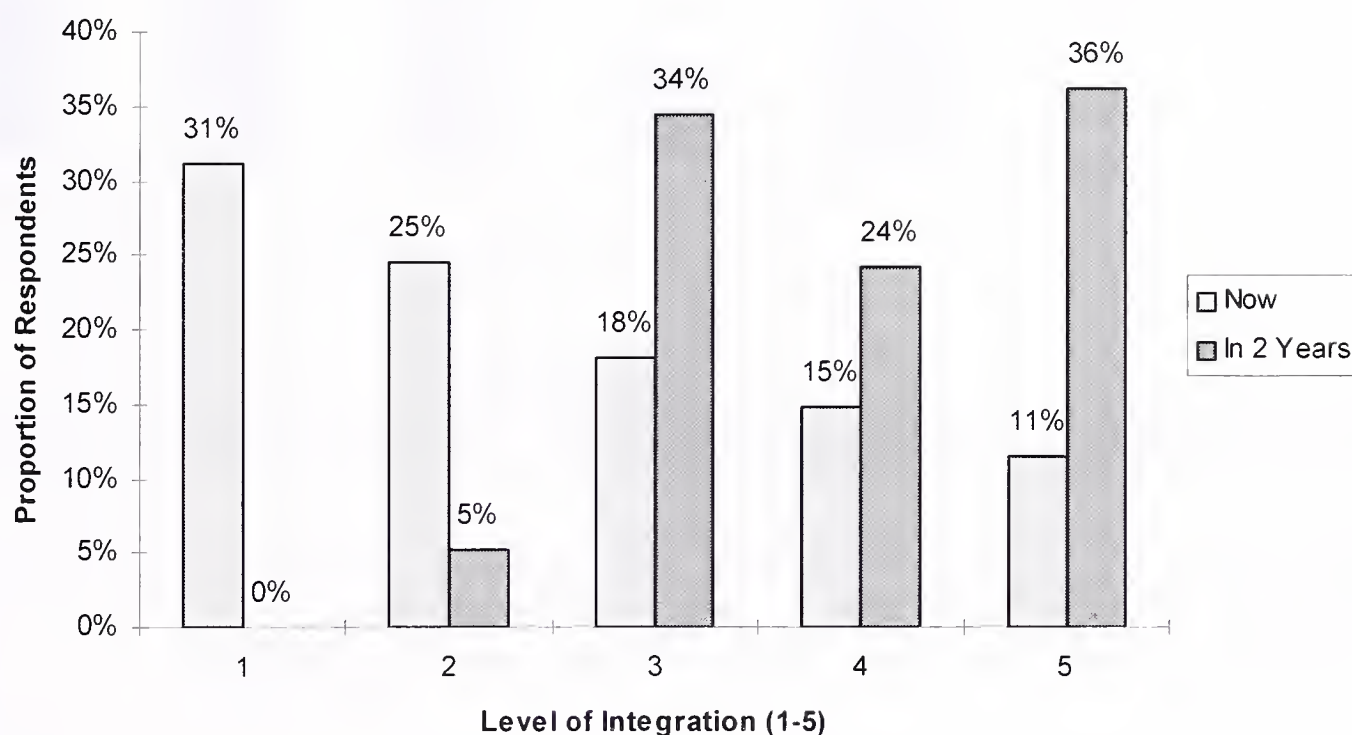
Average 1997:   2.5
Average by 1999:   3.9

Sample: 62   Source: INPUT

Exhibit V-5

Expected Level of Integration Between Intranet and Existing Systems (Intranet Evaluators)

Level of Integration (1-5)

Average: 3.4

Sample: 28   *Source: INPUT*

VI
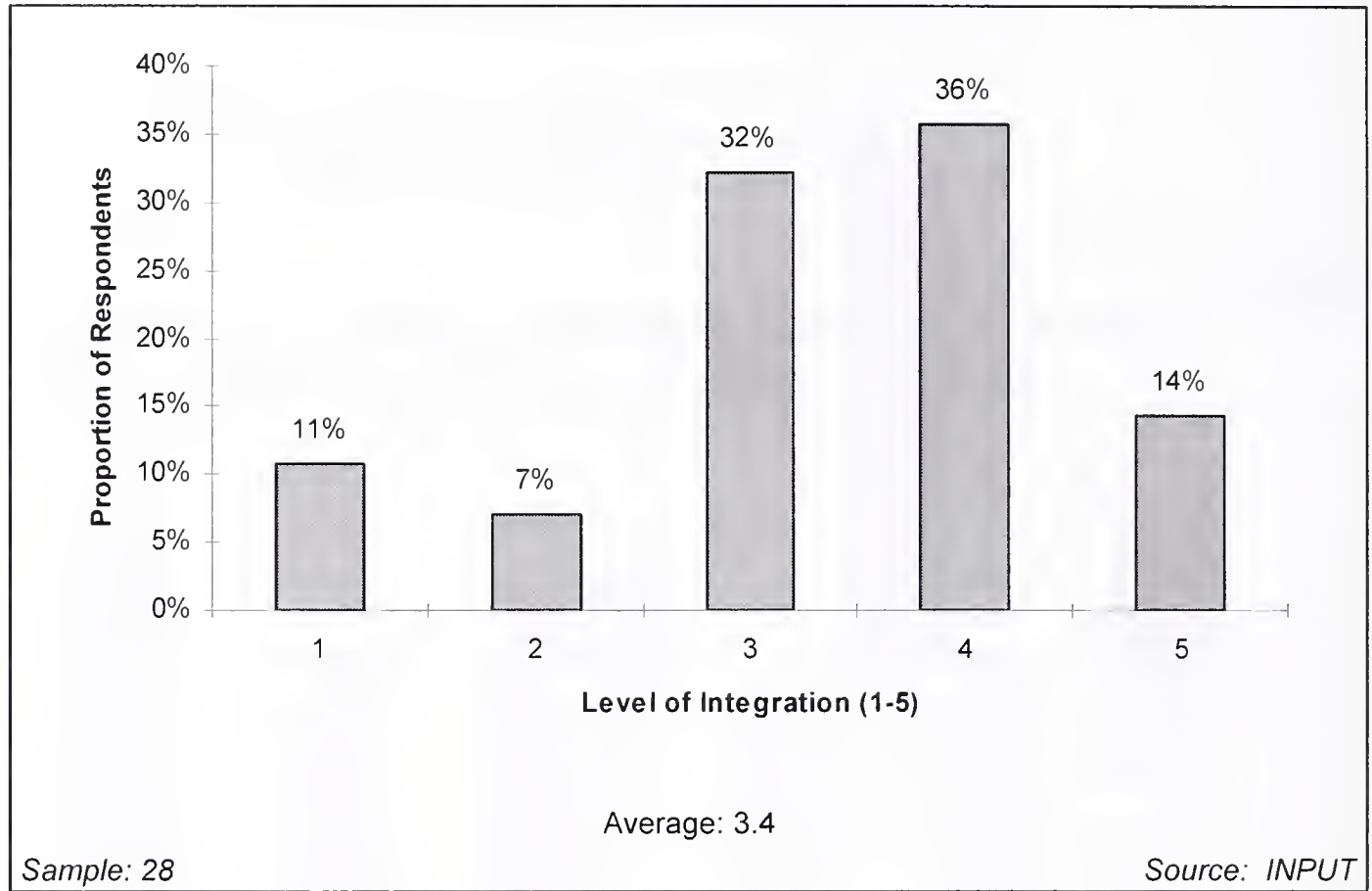
Use of Intranet for Critical Data and Applications

A
Data Sensitivity

1. Company-Sensitive Data

Exhibit VI-2 shows the level of sensitivity of the most sensitive data that Intranet Owners and Builders are passing or will pass over their Intranet.

The ratings are tidemarks: a respondent would score a rating of "high" if any data, regardless of volume, passing over the Intranet was of "high" sensitivity. Examples of different levels of data sensitivity are given in Exhibit VI-1.

Exhibit VI-1

Examples of Data Sensitivity

Data Sensitivity	Business Activity
High	Financial planning data
	Product development plans
	Employee records
Medium	Routine memoranda
	Company policy manuals
Low	Marketing literature
	Staff directories

Source: INPUT

Three-quarters of respondents store data of medium or high sensitivity on their Intranet; approaching half of respondents store data of high sensitivity on their Intranet. Overall, Intranets appear to be considered suitable for storing sensitive data, and INPUT expects the quarter of users who restrict Intranet use to non-sensitive data to diminish as Intranets become accepted for core IT applications, and as security solutions increase in availability and robustness.

Exhibit VI-2

Maximum Sensitivity of Data on Intranet
(Intranet Owners and Builders)

Sample: 61   Source: INPUT
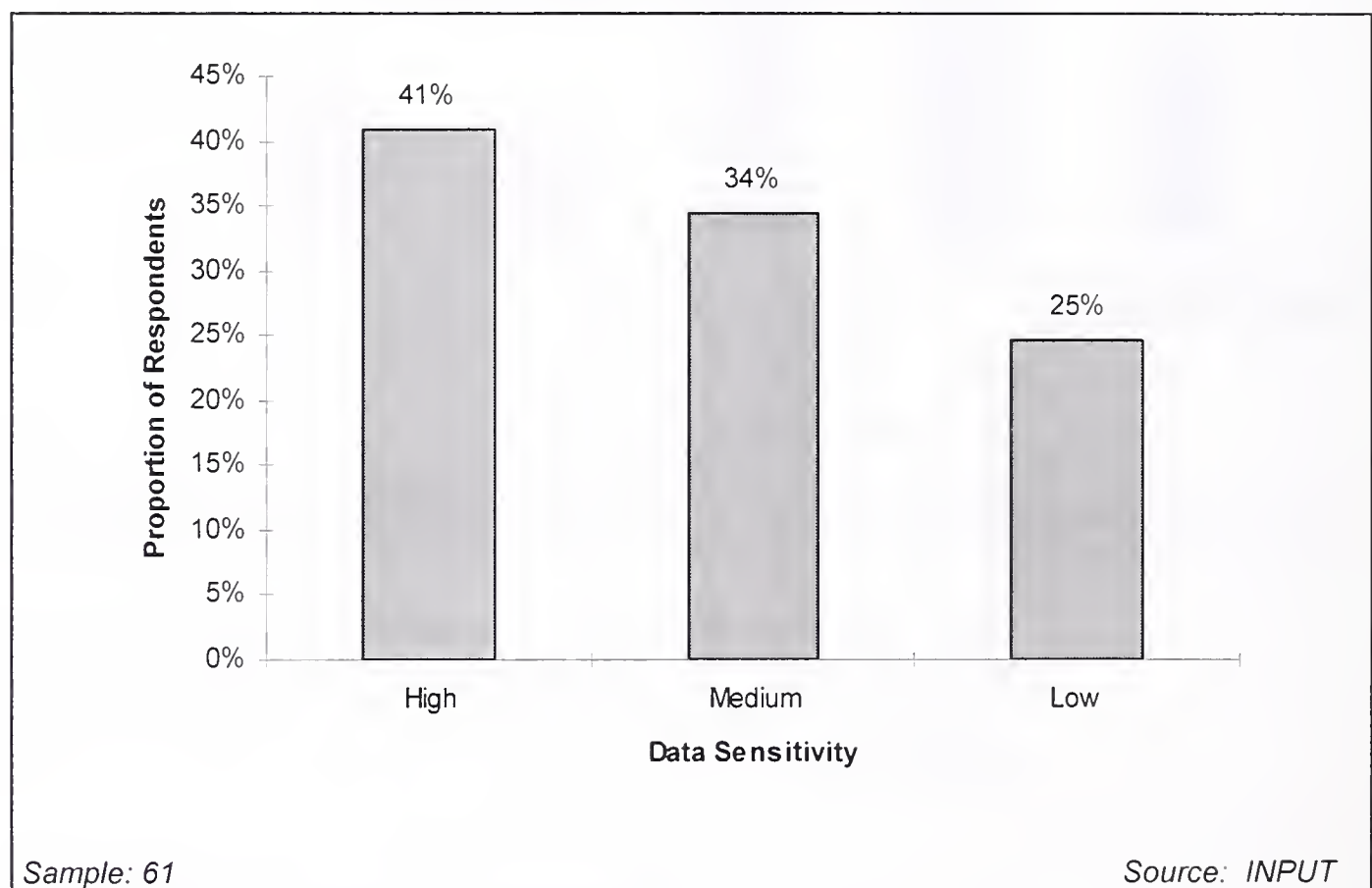
2. Financial Transactions

Exhibit VI-3 shows the proportion of respondents that currently route (Owners) or expect to route (Builders) financial transactions (for example: transactions containing a credit card number or purchase orders) over their Intranet.

One quarter of respondents pass financial transactions over their Intranet; again, INPUT expects this figure to rise as Intranet security solutions increase in availability and quality.

Exhibit VI-3

Routing Financial Transactions Over
Intranet (Intranet Owners and Builders)

Yes
26%

No
74%

Sample: 62   *Source: INPUT*
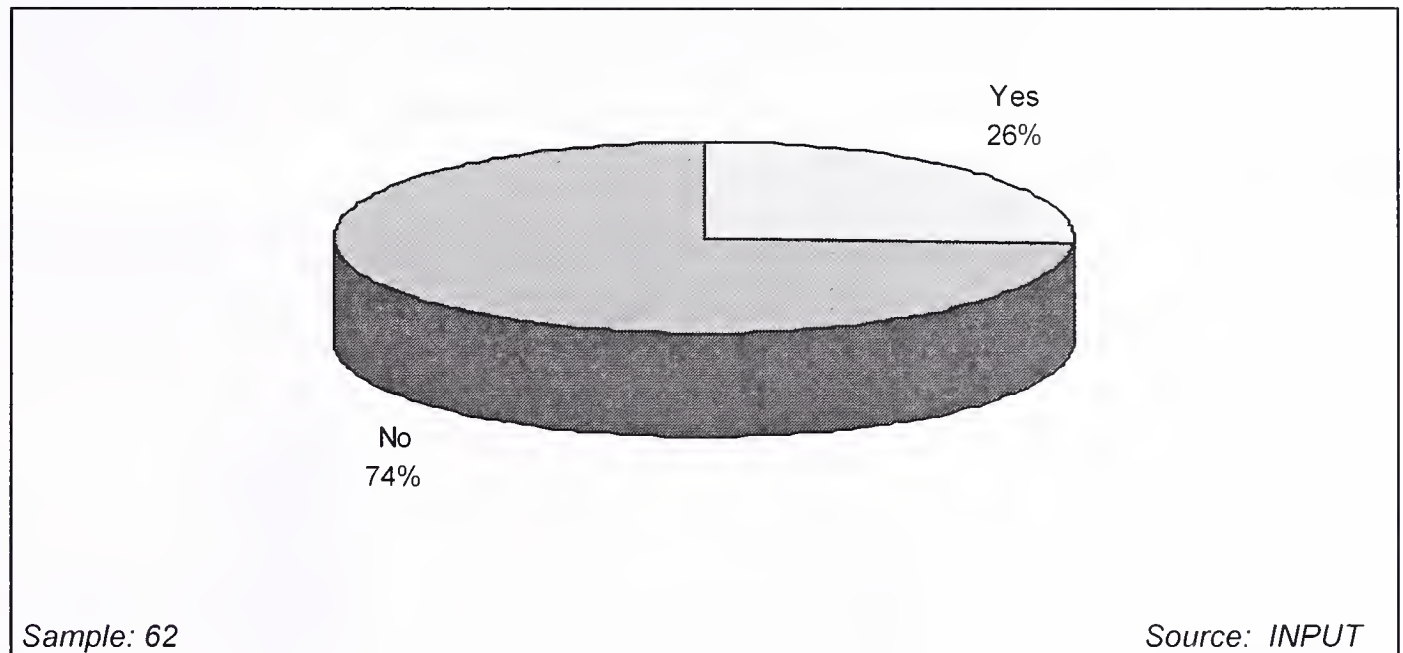
B
Application Criticality

Exhibit VI-5 shows the criticality of the most critical application that Owners and Builders are currently running on their Intranet.

The ratings are tidemarks: a respondent would score a rating of "high" if any application, regardless of volume, used over the Intranet was highly critical. Examples of different critical levels of application are given in Exhibit VI-4.

Exhibit VI-4

Example of Application Criticality

Application Criticality	Examples
High	OLTP
	ERP
Medium	Office automation
	Document management
Low	Company bulletin board

Source: INPUT

Whereas 41% of respondents store data of high sensitivity on their Intranet, only 21% run a highly critical Intranet application. Users and prospective users of Intranets are more cautious of trusting their mission- or business-critical applications to their Intranet than they are their sensitive data, which underlines again the current employment of Intranets for data-driven, rather than application-driven usage.

Exhibit VI-5

Most Critical Application Run on Intranet
(Intranet Owners and Builders)

Sample: 61   Source: INPUT

VII
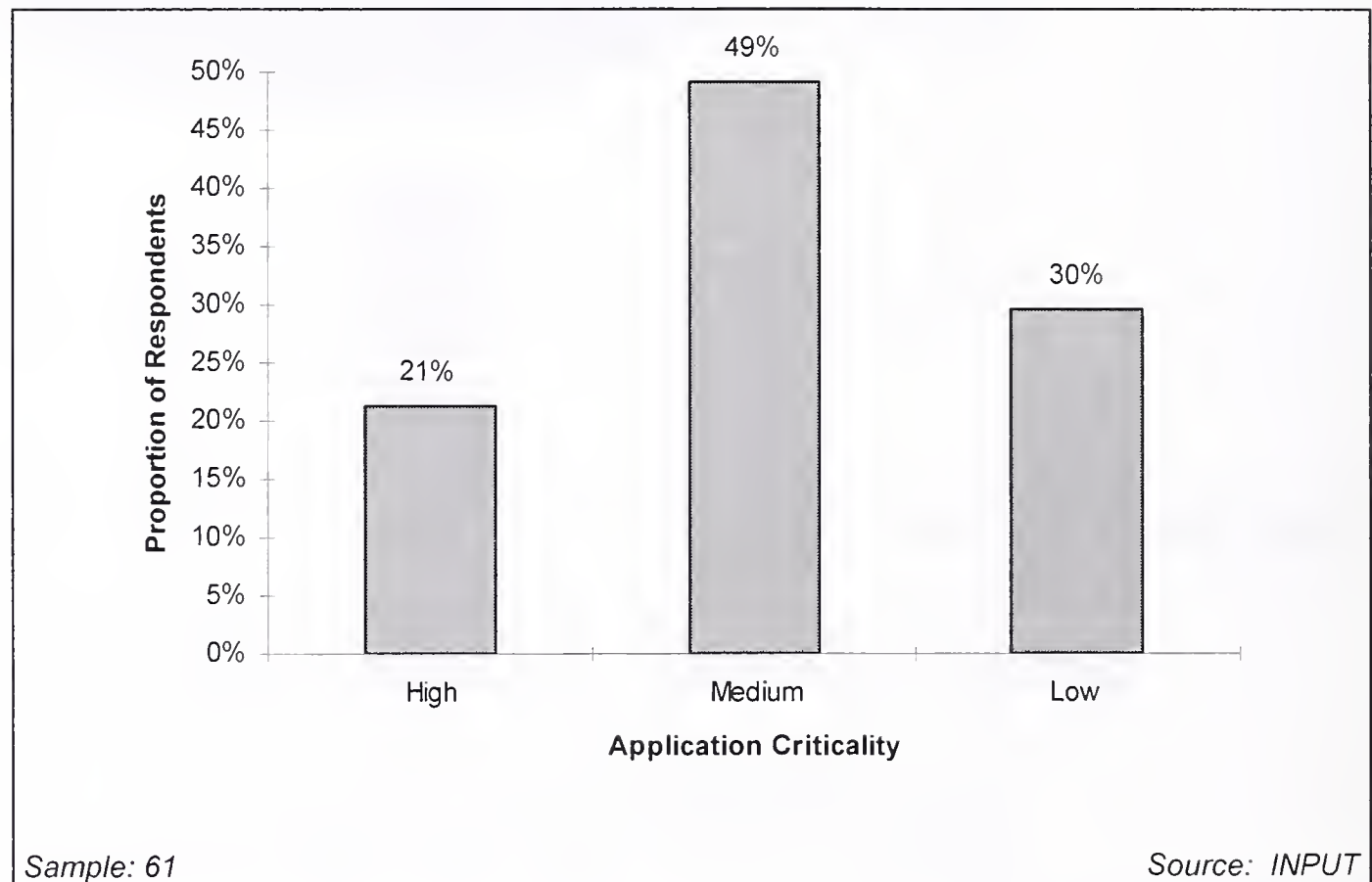
External Intranet Services

A
External Intranet Services Used

Exhibit VII-1 shows the external services used by Intranet Owners and Builders. Exhibit VII-2 shows services which are expected to be used by Intranet Evaluators.

Among all types of respondent, Intranet Web site design / creation is, or is expected to be the most used service, by a small margin. Services aimed at integrating Intranets with existing systems are, or are expected to be the least used overall.

No service stands out as relatively more in demand than other services—there is currently no "killer application" in the field of Intranet services.

More Intranet Evaluators anticipate using external services than has been the case among Intranet Owners and Builders. Around twice as many Evaluators as Owners/Builders expect to use some kind of service on average.

This finding may indicate that when Evaluators come to build their Intranet, they may find their need for services is not as high as they currently expect, due to the relative ease of constructing Intranets. It may also indicate, however, that Evaluators are planning more elaborate Intranets than currently exist on Owners' and Builders' sites. Evaluators' expected patterns of services use (including higher likelihood to outsource their Intranet, and greater propensity to purchase services from a variety of sources), however, reinforce the view that they will, in reality, make greater use of external Intranet services than companies already with an Intranet.

Exhibit VII-1

External Intranet Services Used
(Intranet Owners and Builders)

Sample: 62　　　　　　　　　　　　　　　　　　　　　　　　　　　　　　Source: INPUT
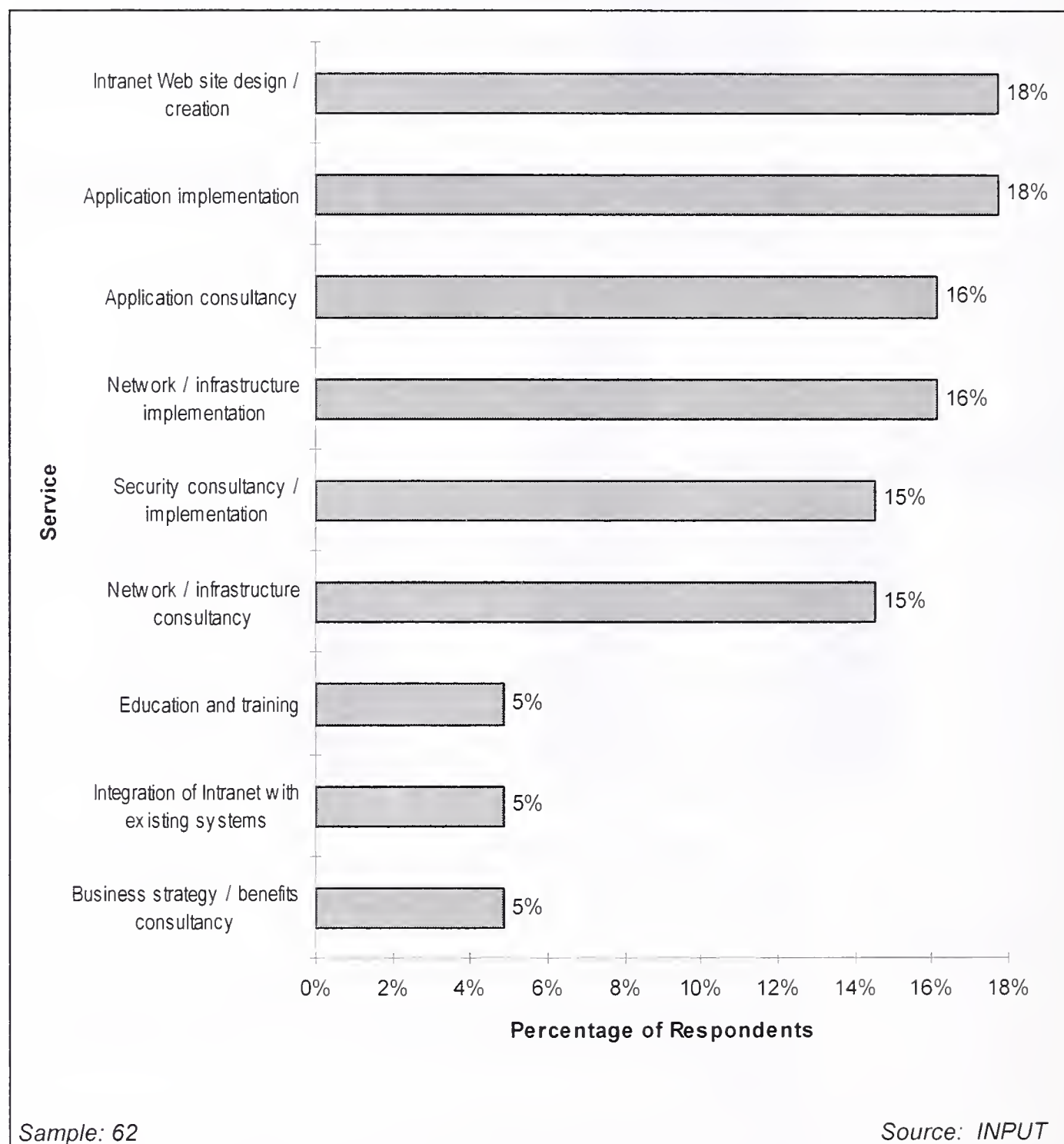
Exhibit VII-2

External Intranet Services to be Used (Intranet Evaluators)

Sample: 28   Source: INPUT
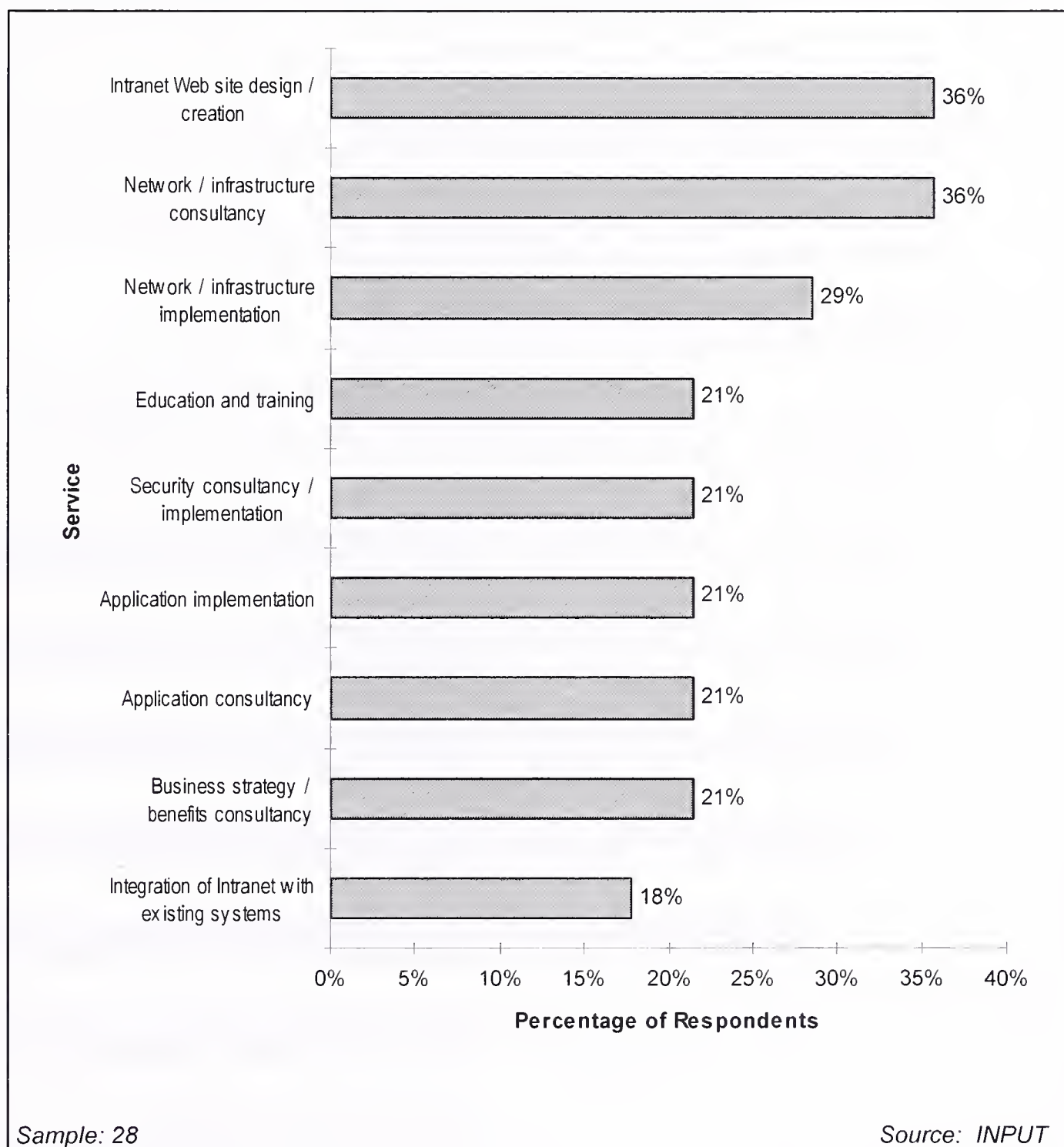
B

Importance of External Intranet Services

Exhibits VII-3 and VII-4 show the importance attached to each service offering by Owners/Builders and Evaluators respectively. The figures presented describe the importance of the service offering, not the importance of the underlying issue.

Security consultancy / implementation received the highest importance rating (rated at 3.9 out of 5 by Evaluators). However, security-related

services have been used by only a small proportion of companies who have used Intranet services to date (15%), indicating either that users are not aware of available Intranet security services or that current offerings do not meet users' requirements.

Business strategy / benefits consultancy is considered the least important service overall, and this is reflected in its current and expected usage levels. There does not appear, therefore, to be a significant opportunity for such a service offering (which may take the form of business process re-engineering, feasibility studies or benefits analysis).

Exhibit VII-3

Importance of External Intranet Services
(Intranet Owners and Builders)

Service	Importance (1-5)
Integration of Intranet with existing systems	3.5
Application implementation	3.5
Network / infrastructure implementation	3.5
Intranet Web site design / creation	3.4
Security consultancy / implementation	3.4
Network / infrastructure consultancy	3.3
Application consultancy	3.3
Education and training	3.2
Business strategy / benefits consultancy	3.0

Sample: 62   *Source: INPUT*
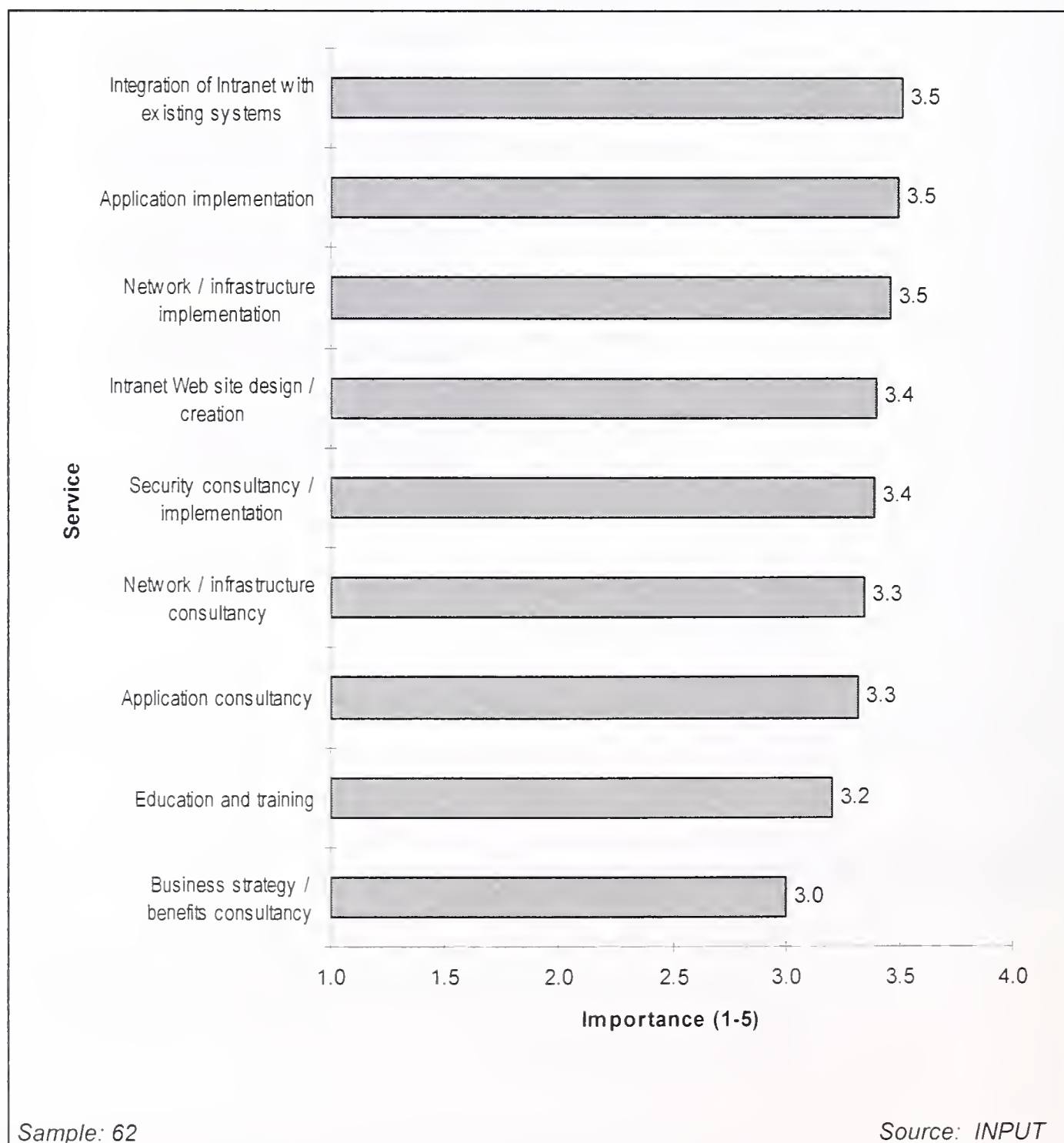
Exhibit VII-4

Importance of External Intranet Services
(Intranet Evaluators)

Service

Security consultancy / implementation	3.9
Network / infrastructure implementation	3.7
Intranet Web site design / creation	3.7
Application implementation	3.6
Integration of Intranet with existing systems	3.6
Application consultancy	3.5
Education and training	3.4
Network / infrastructure consultancy	3.3
Business strategy / benefits consultancy	3.1

Importance (1-5)

Sample: 28   *Source: INPUT*

C
Satisfaction with External Intranet Services

Among both Owners and Builders, not enough Intranet services satisfaction ratings were available to present statistically or to draw firm conclusions from. For completeness, however, Exhibit VII-5 shows Owners' and Builders' satisfaction ratings by service type (where data was available).

Exhibit VII-6 shows Owners' and Builders' satisfaction ratings by vendor (where data was available).

Exhibit VII-5

Satisfaction with External Intranet Services (Intranet Owners and Builders)

Service	Satisfaction (Number of mentions: 1=not satisfied, 5=very satisfied)				
	1	2	3	4	5
Business strategy / benefits consultancy	1		4	2	1
Network / infrastructure consultancy		1	5	4	2
Network / infrastructure implementation			6	5	2
Application consultancy	1		2	8	1
Application implementation		1	1	8	3
Intranet Web site design / creation	1		5	7	1
Integration of Intranet with existing systems		1	2	3	1
Security consultancy / implementation			1	7	5
Education and training		2		4	2

Source: INPUT

Exhibit VII-6

Satisfaction with External Intranet Services (by Vendor)

Service	Vendor	Satisfaction (Individual ratings: 1=not satisfied, 5=very satisfied)
Business strategy / benefits consultancy	ESP	4
Network / infrastructure consultancy	Andersen	4
	Comdisco/MicroAge	3
	Microsoft	2
	EDS	3
Network / infrastructure implementation	Andersen	4
	Comdisco/MicroAge	3
	Deloitte & Touche/Andersen	3
	ESP	5
	Microsoft	3
	EDS	3
Application consultancy	Andersen	4
	TriNet	4
	ESP	4, 5
	TX Soft	4
	Cole & Webber	1
Application implementation	CTG/SAIC/Sema	5
	Andersen	4
	TriNet	4
	ESP	5
	TX Soft	4
Intranet Web site design / creation	Andersen	4
	Network Strategies	3
	ESP	4, 5
	Cole & Webber	1
Integration of Intranet with existing systems	ESP	5
Security consultancy / implementation	Deloitte & Touche/Andersen	3
	ESP	4, 5
Education and training	ESP	4

Source: INPUT

D

Intranet Service Provider Preferences: One-Stop-Shop or Mix-and-Match

Exhibits VII-7 and VII-8 show the preferences of Owners/Builders and Evaluators respectively for a "one-stop-shop" or a "mix-and-match" approach to external Intranet services.

Owners/Builders and Evaluators differ greatly in their preference for sourcing Intranet services. All Owners/Builders who expressed a preference

stated they would favor a single source, or a "one-stop-shop" approach to procuring external Intranet services. Only half of Evaluators favor such an approach.

Exhibit VII-7

Intranet Service Provider Preferences
(Intranet Owners and Builders)

Sample: 18   Source: INPUT
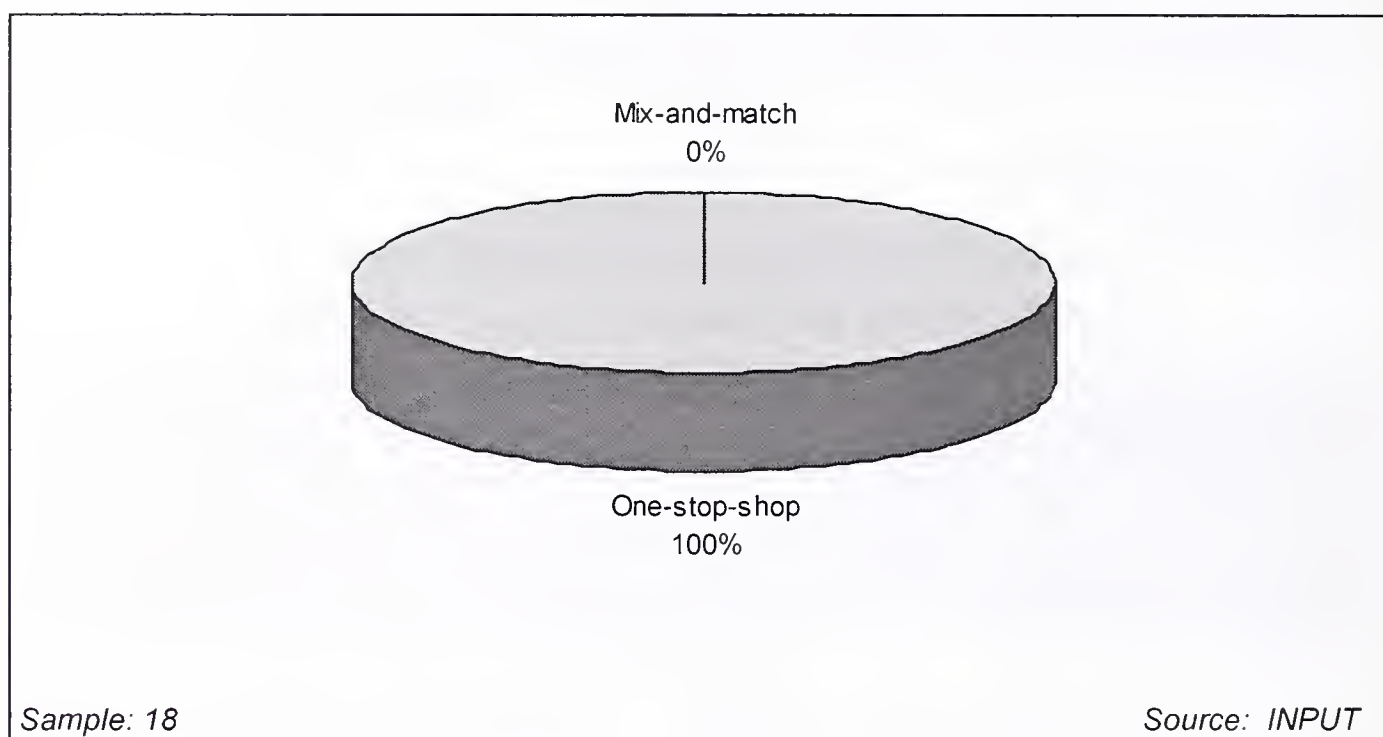
Exhibit VII-8

Intranet Service Provider Preferences (Intranet Evaluators)

Sample: 25   Source: INPUT

VIII

47
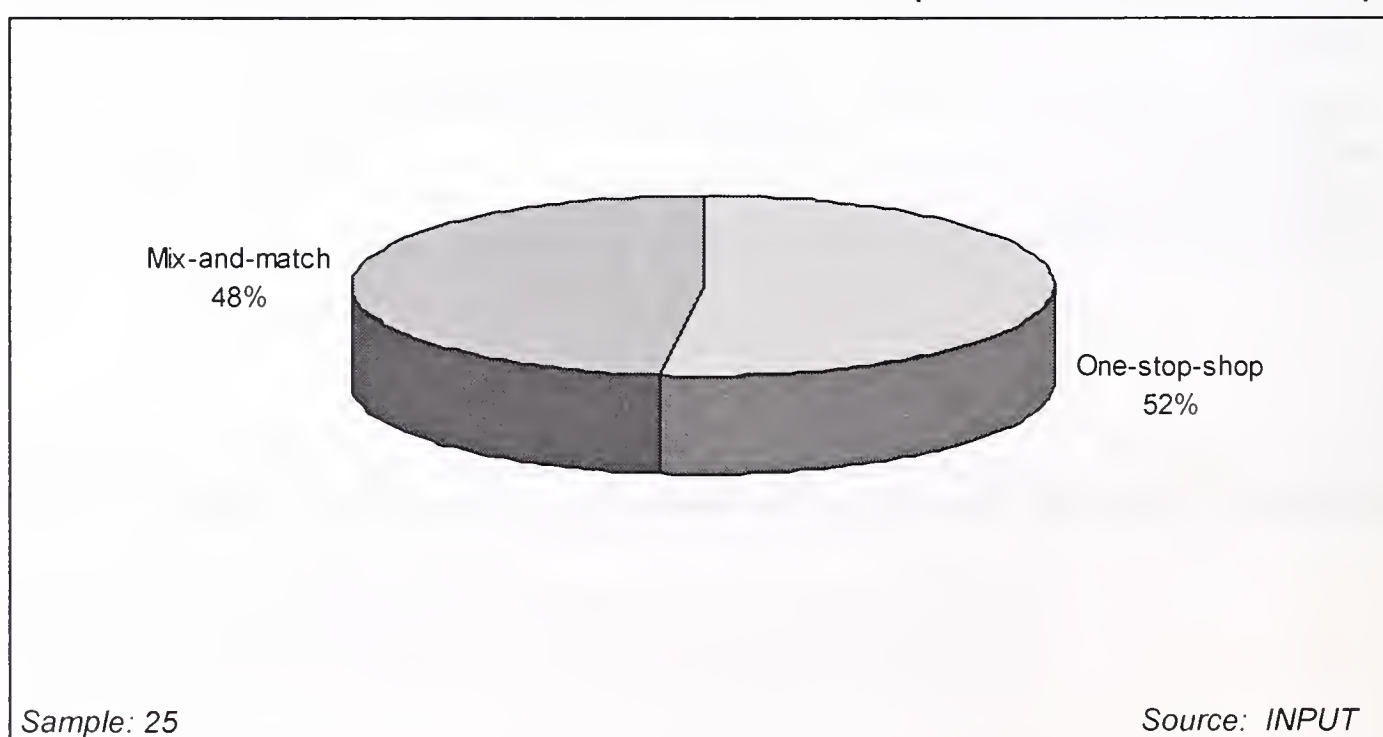
Beyond Development: Applications and Outsourcing

A
Intranet Applications Used

Exhibits VIII-1, and VIII-2 show the applications used, or expected to be used, by Intranet Owners/Builders and Evaluators respectively.

The clear majority of organizations use their Intranet for "phase one" activities (static information distribution). However, while other applications are used by relatively much smaller proportions of users, the level of use (current and expected) is reasonably high. Between a third and a half of all types of respondent use, or will use their Intranets for group collaboration / conferencing, general office applications, project management / workflow, and sales force automation.

While the use of Intranet applications overall is reasonably high, only 14% of Owners/Builders and Evaluators use or plan to use ERP applications (such as those from SAP, Baan and PeopleSoft).

Exhibit VIII-1

Applications Used (Intranet Owners and Builders)

Sample: 62   Source: INPUT
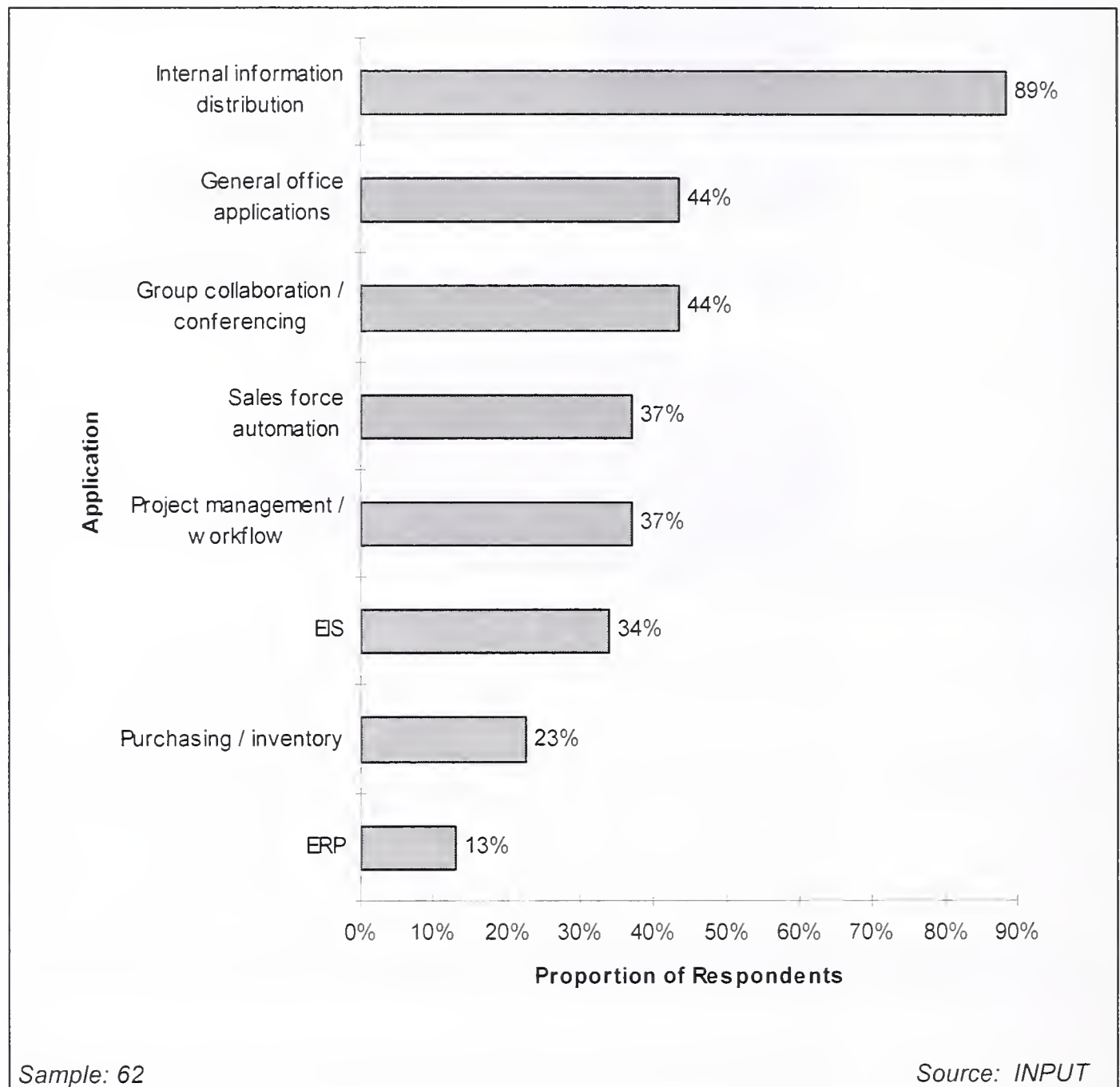
Exhibit VIII-2

Applications Expected to be Used (Intranet Evaluators)

Internal information distribution — 68%

Project management / workflow — 46%

General office applications — 43%

Sales force automation — 39%

Group collaboration / conferencing — 39%

EIS — 29%

Purchasing / inventory — 21%

ERP — 18%

X-axis: Proportion of Respondents (0% 10% 20% 30% 40% 50% 60% 70%)

Y-axis: Application

Sample: 28   Source: INPUT
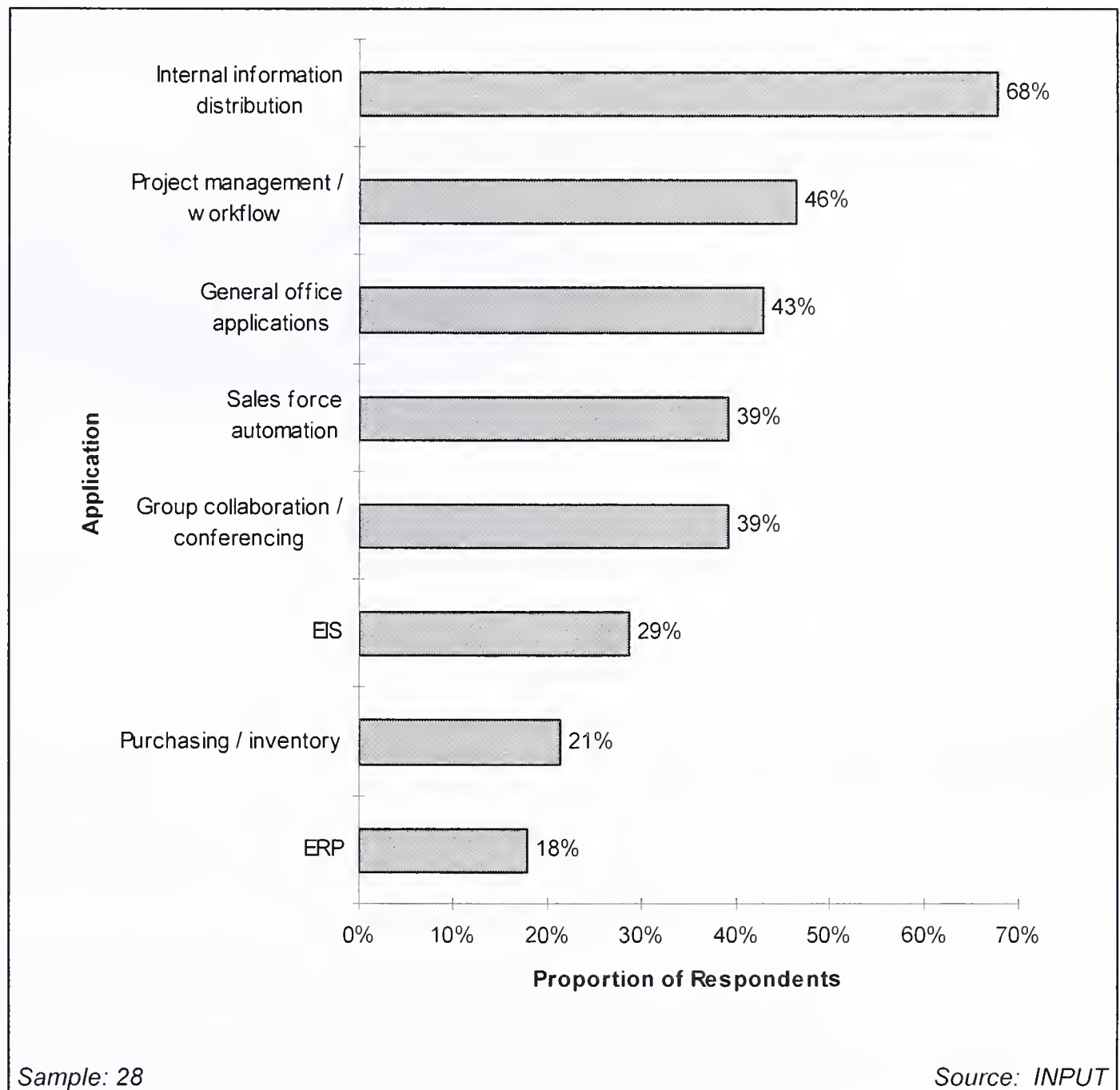
B

Source of Intranet Applications

Exhibit VIII-3 shows the sources of applications used by Owners and Builders. Three-quarters of organizations develop Intranet applications in-house. INPUT expects the proportion of in-house applications to decrease over time, as the availability and quality of packaged Intranet applications increase.

Exhibit VIII-3

Sources of Intranet Applications
(Intranet Owners and Builders)

Off-the-shelf
13%

Third-party
14%

In-house
73%

Sample: 62   *Source: INPUT*
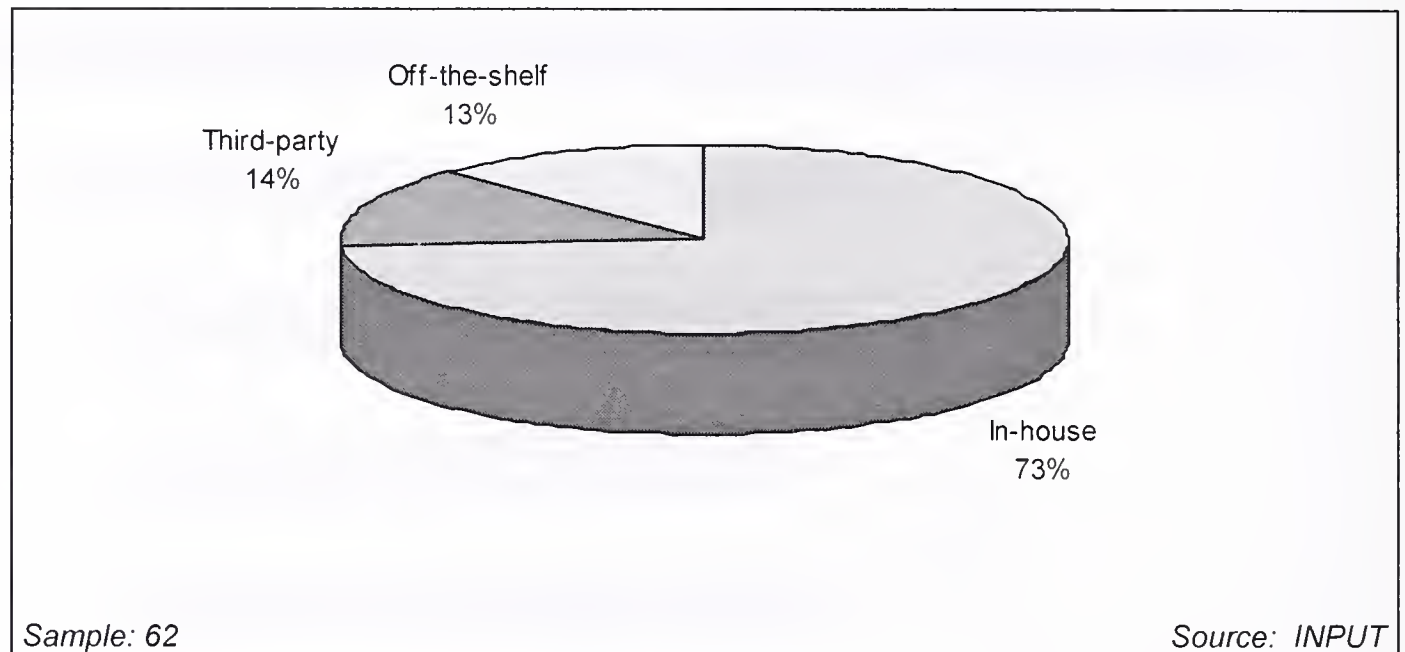
C

Intranet Management Tools

Exhibit VIII-4 shows the tools used by Owners and Builders to manage their Intranet. Tools include traffic volume monitoring, IP address management, and Web site management tools.

General-purpose network management tools are most common overall, although specialized Intranet or Web server tools are used by a quarter of Intranet users. INPUT believes the two types of tool will merge (to reflect the convergence of traditional networks with Intranets). Hewlett-Packard's addition of Intranet Web server management features into OpenView is an example of this trend.

The quarter of users who perform manual monitoring and management will decrease over time as Intranets increase in size and complexity to match current networks.

Exhibit VIII-4

Intranet Management Tools Used
(Intranet Owners and Builders)

General network management tool — 45%

Manual monitoring / management — 24%

Specific Intranet / Web server management tool — 23%

Nothing specifically — 16%

Management Tool (y-axis)

0%   10%   20%   30%   40%   50%

Proportion of Respondents

Sample: 62   Source: INPUT
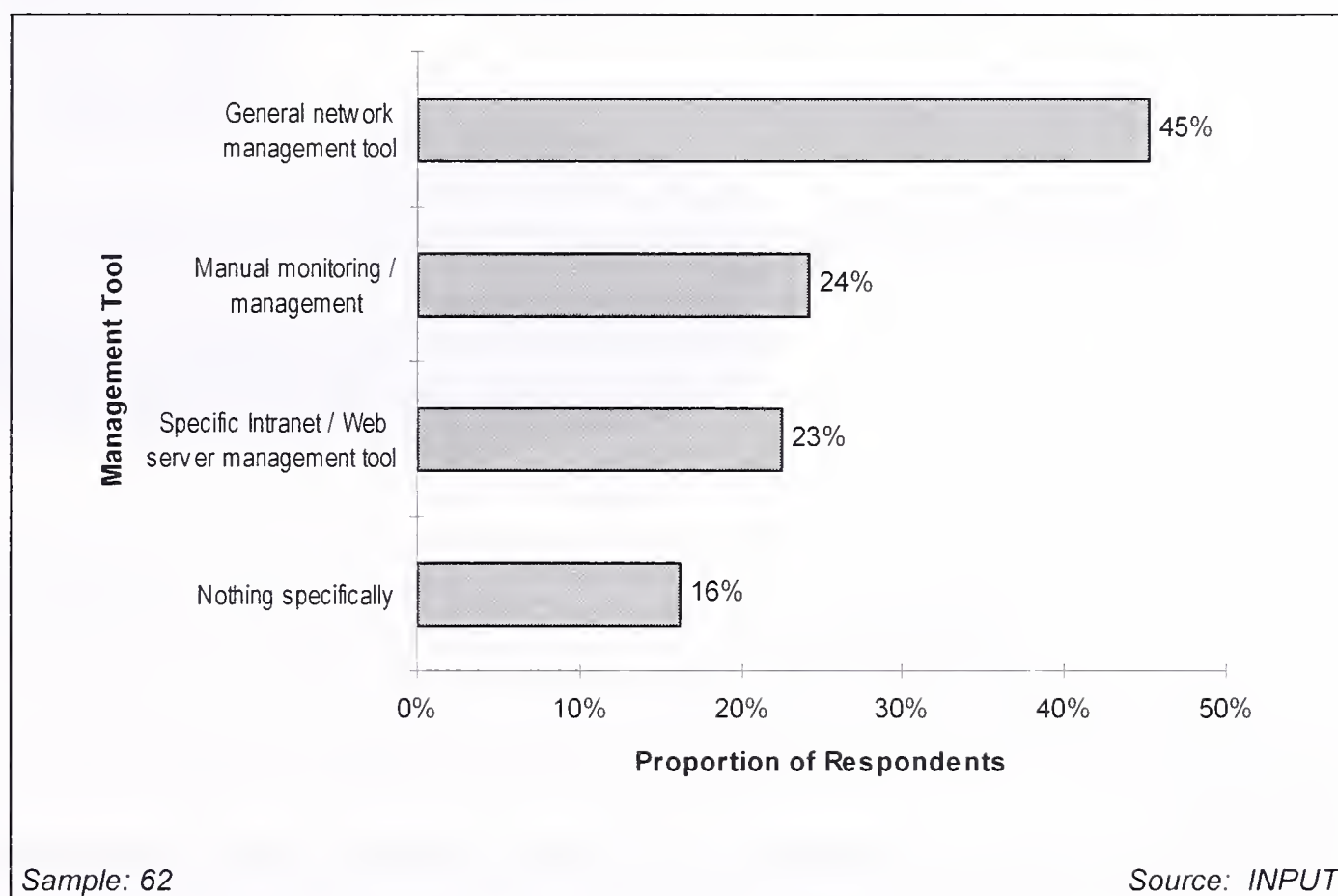
D

Intranet Outsourcing Intentions

Exhibits VIII-5 and VIII-6 show the proportion of Owners/Builders and Evaluators respectively who intend to outsource their Intranet.

Organizations who have yet to begin Intranet development are twice as likely to outsource their Intranet as are organizations who have started or completed development. Nevertheless, most users intend to keep operational support in-house. Note that the respondents who stated they did not intend to outsource their Intranet are not committed permanently to running their Intranet in-house, but that they currently have no intentions to outsource it. Their intentions may change as their circumstances change, for example, as they build complex applications or increase the reach of their Intranet.

It should also be noted that the views expressed reflect the nature of the respondents, IT managers, who may not be representative of their organization overall in this issue.

Exhibit VIII-5

Intention to Outsource Intranet
(Intranet Owners and Builders)

Sample: 61   *Source: INPUT*
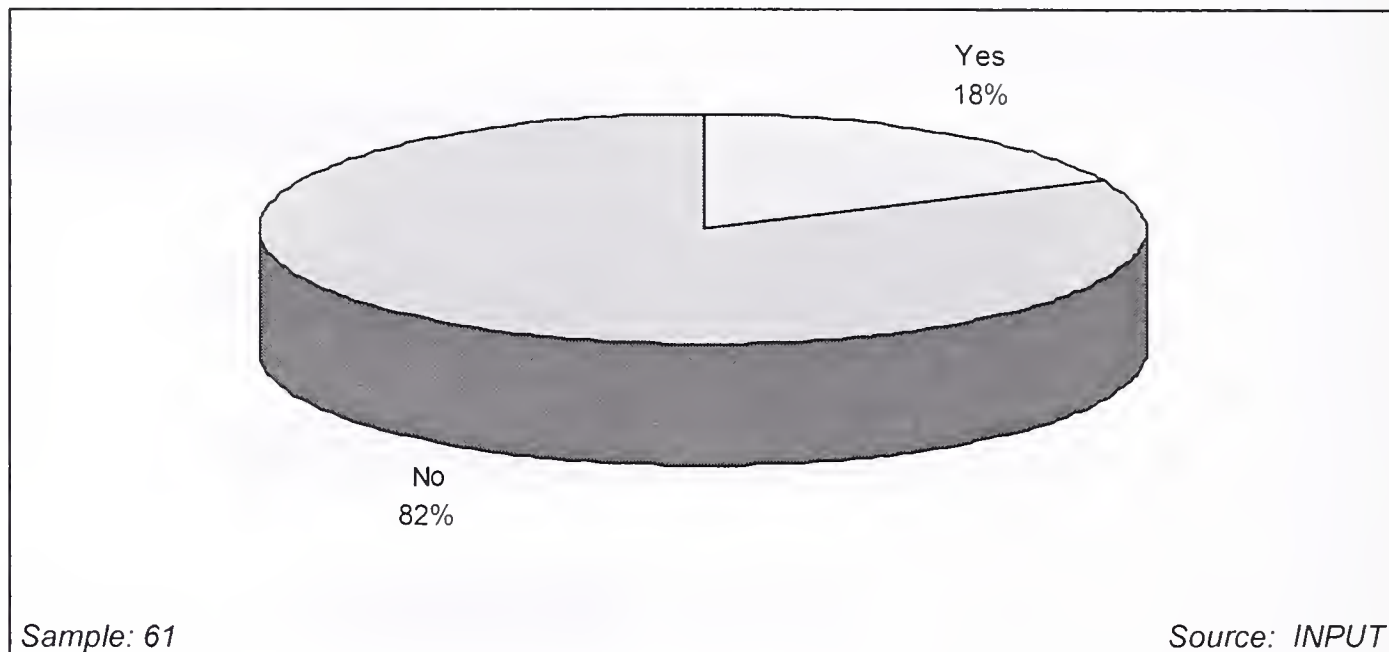
Exhibit VIII-6

Intention to Outsource Intranet (Intranet Evaluators)

Sample: 25   *Source: INPUT*

IX
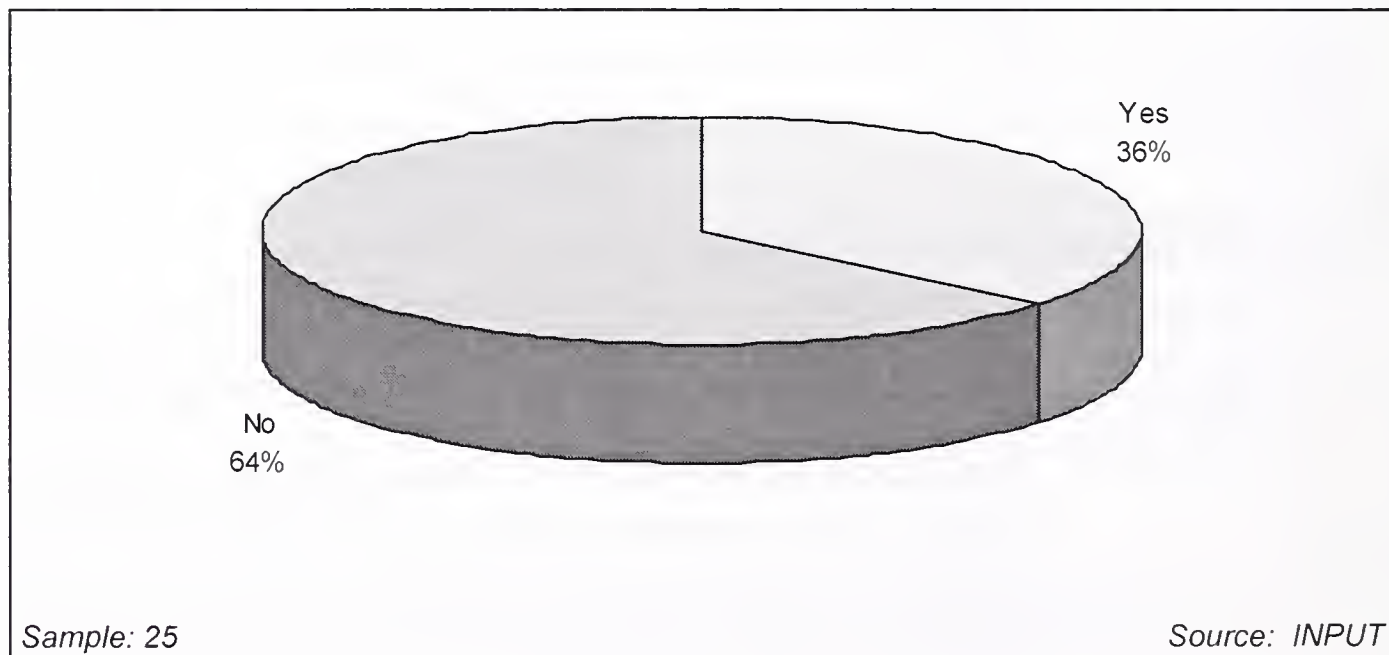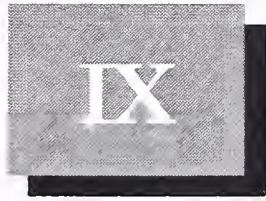
Extent of Intranet Deployment

A
Departments Benefited from Intranet

Exhibits IX-1 and IX-2 show which departments within Intranet Owner/Builder and Evaluator organizations respectively have benefited or are expected to benefit most from an Intranet.

Evaluators expect sales and marketing departments to benefit from Intranet use; Owners/Builders report that human resources (HR) departments benefit most often from Intranets.

Many early Intranet applications were HR-related, notably internal information distribution (company manuals, memos, staff pay and benefit notices, etc.), hence the frequent mention of HR as Intranet beneficiary.

Exhibit IX-1

Departments Benefited From Intranet
(Intranet Owners and Builders)

Sample: 62   Source: INPUT
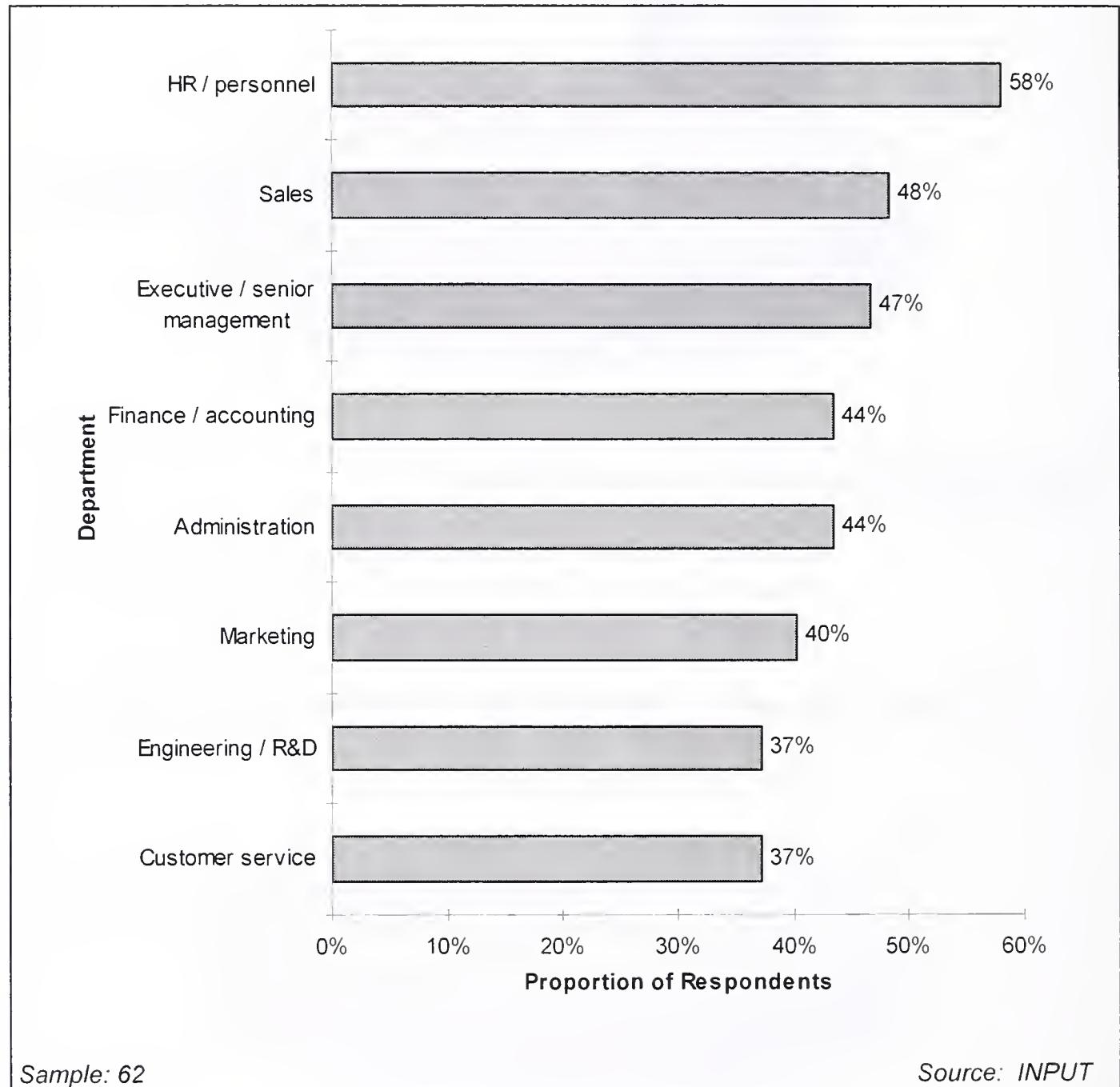
Exhibit IX-2

Departments Expected to Benefit from Intranet (Intranet Evaluators)

Sample: 28   Source: INPUT
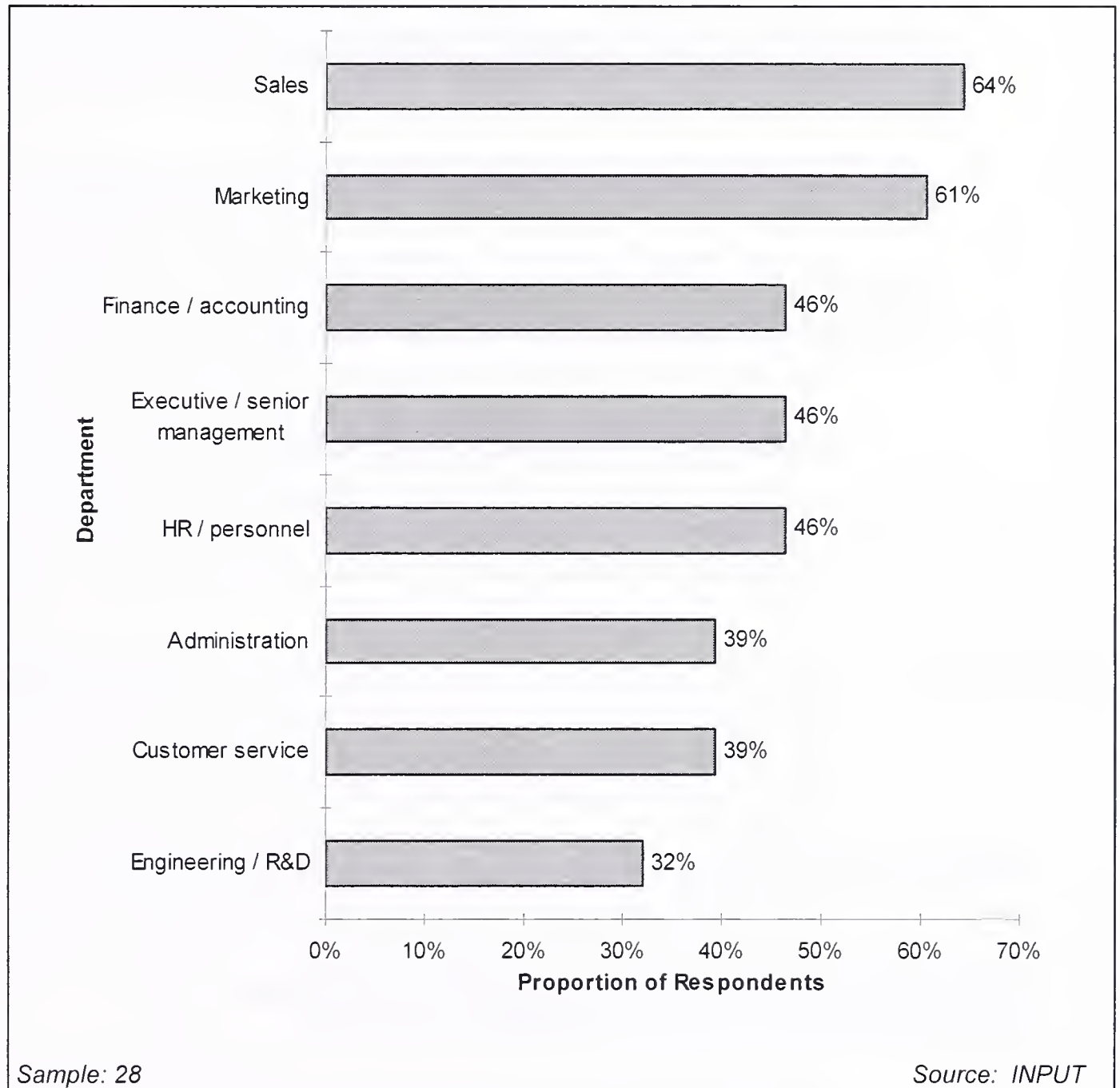
B

Connectivity Supported

Exhibits IX-3 and IX-4 show the levels of connectivity currently or to be supported by Owners/Builders and Evaluators respectively.

Surprisingly, only around half of respondents allow or intend to allow access to the public Internet from their Intranet. This is strikingly different from the picture in Europe, where the figure is around 90%. Users are clearly concerned about either the technology available to secure a mixed public and

private network environment, or the effect of public Internet connectivity on staff productivity.

Nearly as many users support Extranet as Internet connectivity. (An Extranet is the connection of two or more geographically separate Intranets over the public Internet. Extranets are most commonly seen as a way to connect customers, suppliers and partners.)

While the market for full-function Extranet applications is still embryonic, not all users require such applications. Simple access to another organizations' Intranet qualifies as an Extranet, even though what can be done thereafter may be limited. The relatively high proportion of respondents claiming Extranet connectivity does not, therefore, indicate extensive use of Extranet applications (commerce, for example), but indicates that the basic infrastructure is in place in those organizations, even if only for simple functions such as file transfer. Widespread use of the Internet to conduct commerce will not occur until industry standards are established and tested in live applications. INPUT expects Internet commerce to increase rapidly from 1998, as such standards as SET achieve market acceptance.

Nearly half of all types of respondent were optimistic of their ability to support mobile workers via their Intranet. There are still significant problems involved in providing mobile workers with access to applications and data held on an Intranet, primarily related to bandwidth. Intranets are developed to run within a corporate network, and the reduced bandwidth available to users outside the network, connecting via modem, both limits the amount of data that can be accessed and incurs management problems in data synchronization. The bandwidth available to individual mobile workers is typically less than one percent of that available to users sharing an internal network (in this case, 28.8Kbps as opposed to 10Mbps).

Home workers (or "telecommuters") also enjoy relatively high levels of support, claimed by over 40% of users (and also in stark contrast to Europe, where fewer than 10% of users support or intend to support home workers).

INPUT expects support for home workers to increase further in the future as more employees purchase home PCs, modem speeds increase (notably to 56Kbps), ISDN drops in price, and next-generation technology such as ADSL becomes available. Equally important are non-technology issues, such as environmental car use legislation, maternity issues and even natural disasters such as the San Francisco earthquake of 1989.

Exhibit IX-3

Connectivity Supported (Intranet Owners and Builders)

Sample: 62   Source: INPUT
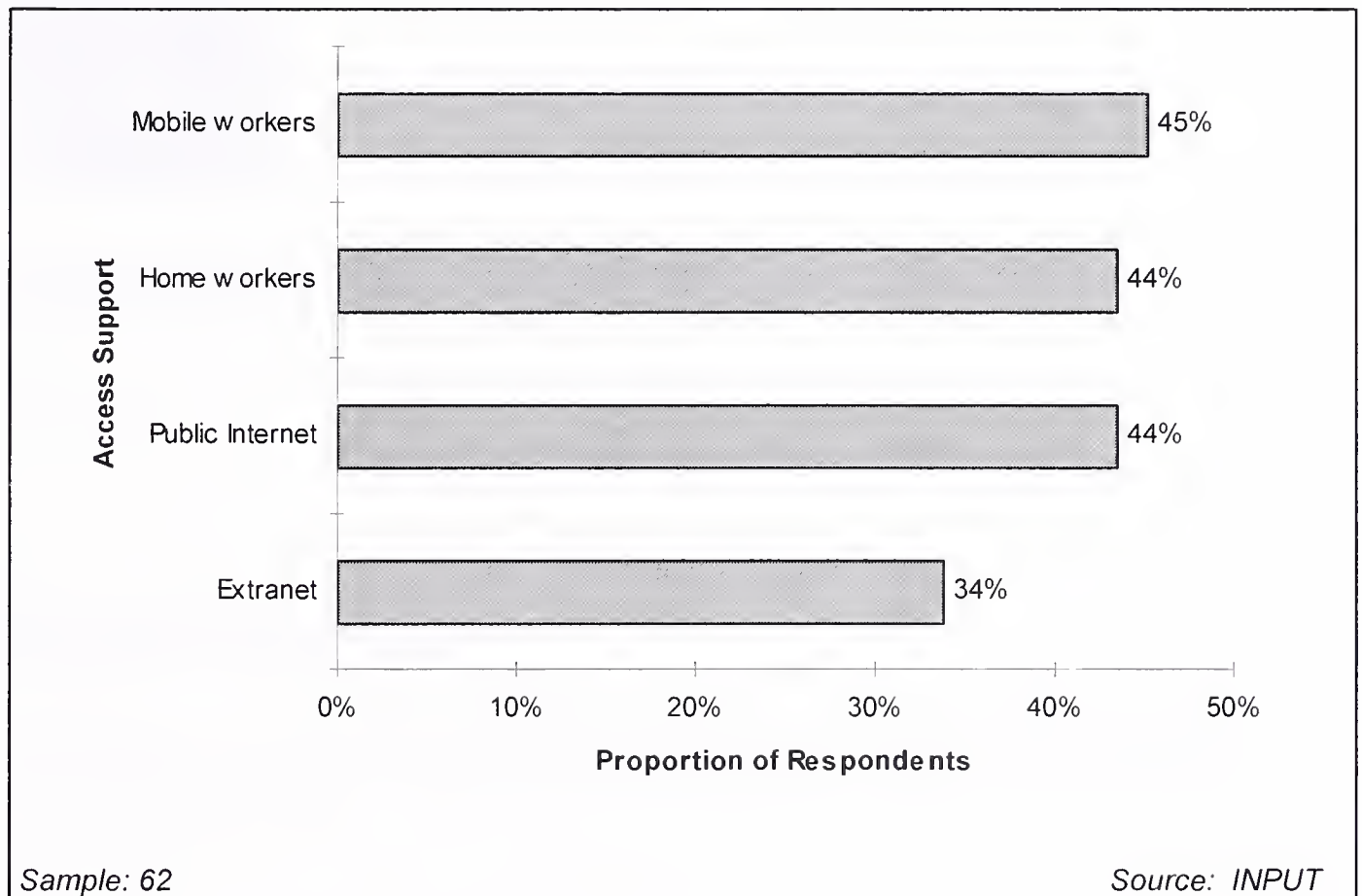
Exhibit IX-4

Connectivity to be Supported (Intranet Evaluators)

Sample: 28   Source: INPUT

(Blank)

X
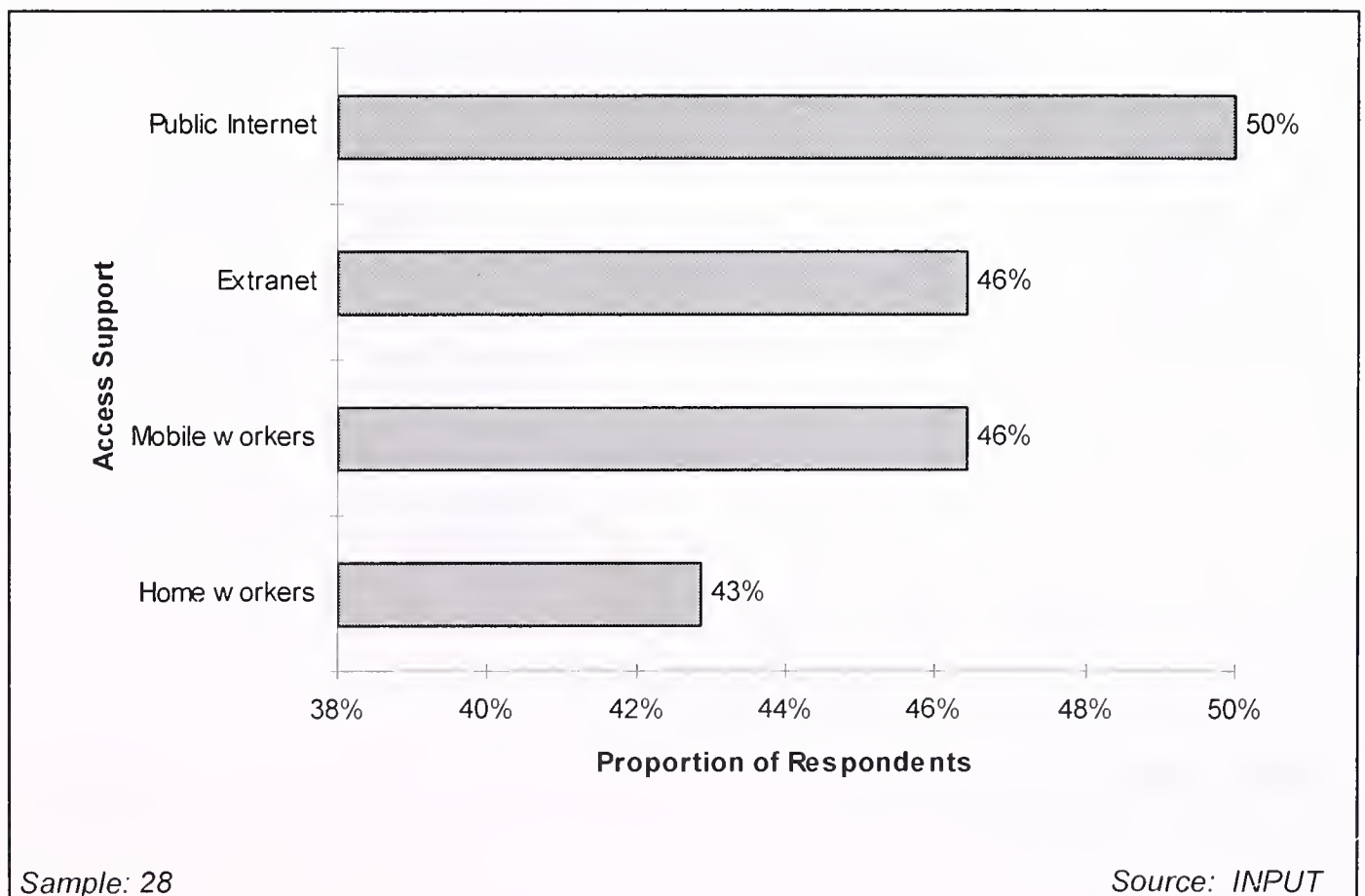
Intranet Budgeting

A

Roles Played in Intranet Development

Exhibits X-1 and X-2 show which areas within organizations initiated Intranet activities and which areas have played a major ongoing role in Intranet activities.

Exhibit X-1

Roles Played in Intranet Activities
(Intranet Owners and Builders)

Sample: 62   Source: INPUT
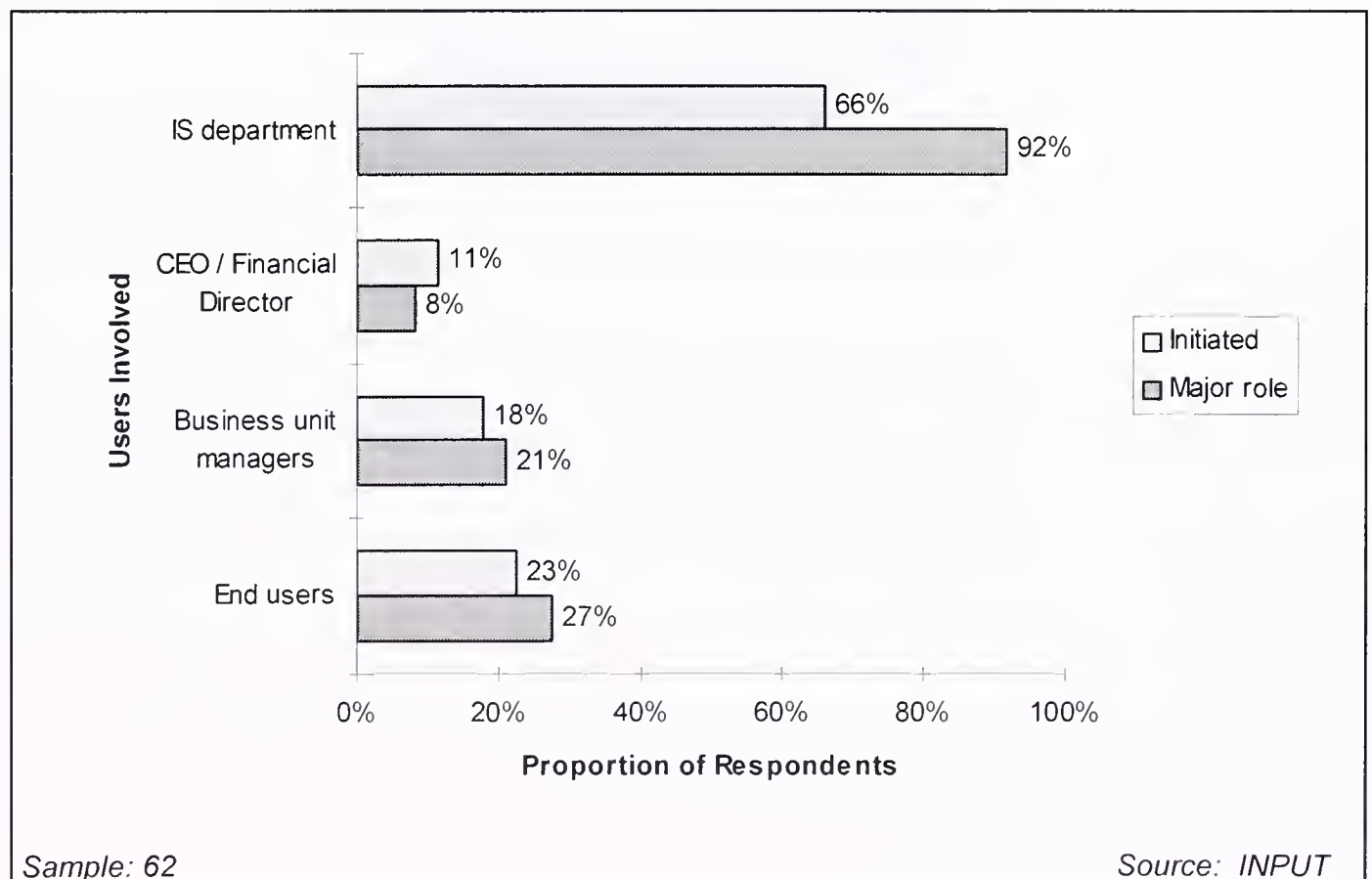
Exhibit X-2

Roles Played in Intranet Activities (Intranet Evaluators)

Sample: 28   Source: INPUT
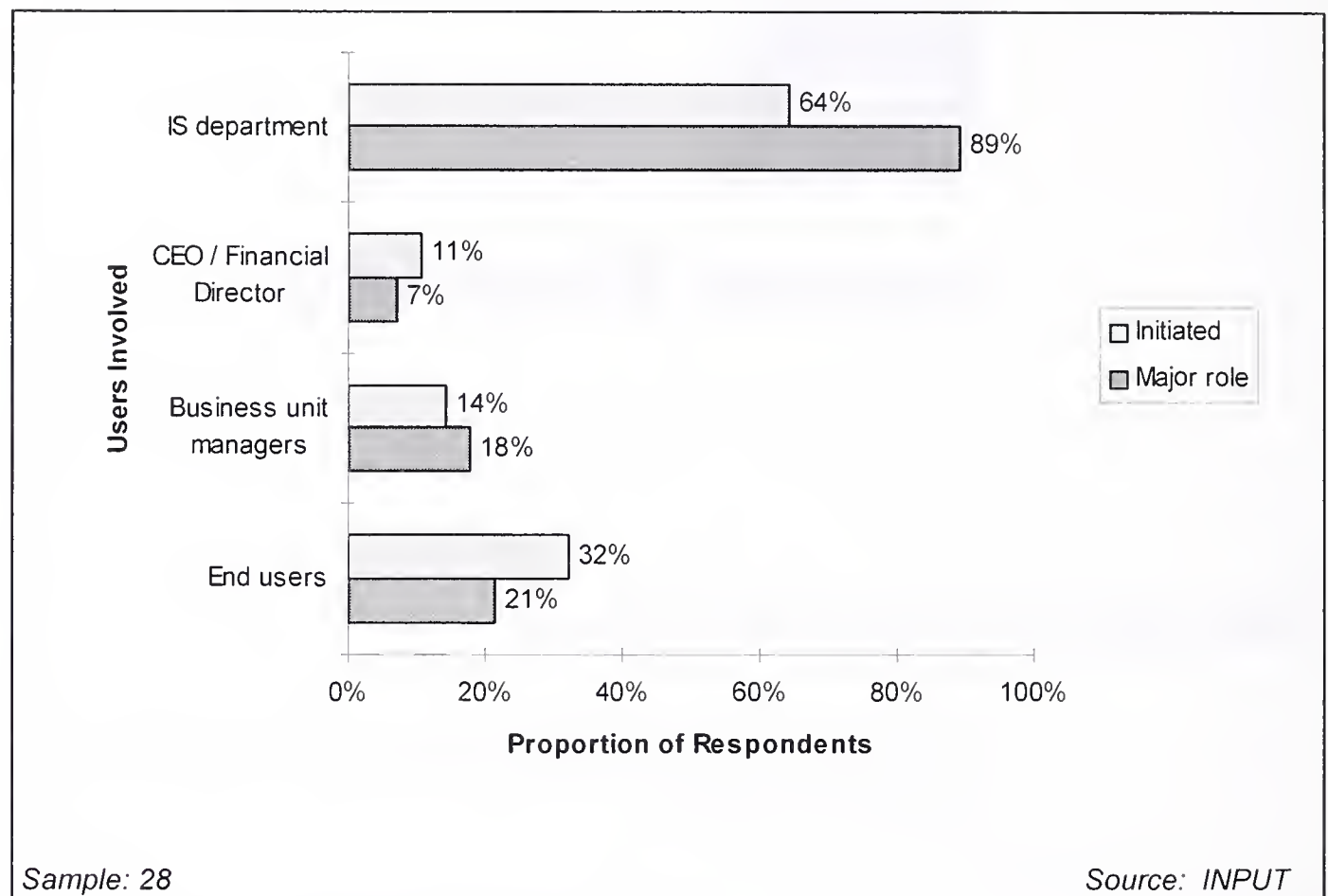
There is very little difference between current Intranet users/developers and future Intranet users. In nearly all cases, different functional areas initiate as much as they further Intranet activities.

Across all respondents, IS departments have played by far the biggest role both in terms of initiating Intranets and playing a major role in their development. Business unit managers are the second most significant force within organisations in initiating and driving Intranets.

IT vendors' Intranet marketing should be targeted at the major initiators of Intranet projects (IS Director or CIO). Although named by fewer organisations as Intranet initiators, CEOs and CFOs should also be targeted when their relative influence within the organisation is considered. For application-specific products and services, business unit managers will be primary targets.

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B

Intranet Development Budget Allocation and Sourcing

Intranet budgets are mostly set and sourced from central IT budgets, particularly so among Intranet Evaluators. Out of 49 Owners and Builders who described their Intranet budgets, 32 budgets are set centrally (by corporate parent or headquarters). Out of 26 Evaluators who described their budget, 22 expect their budgets to be set centrally.

Exhibit X-3 shows the breakdown of Intranet budget sources within Owner and Builder organisations. Overall, IS contributes the greatest proportion of the budget required, indicating Intranets are still seen as a technology, not a business issue. This finding reinforces the recommendation that Intranet services marketing is targeted at the IS department within prospective user organisations.

Exhibit X-3

Intranet Budget Sources (Intranet Owners and Builders)

End users
13%

Business unit
managers
18%

IS department
68%

CEO / CFO
1%

Sample: 48   Source: INPUT
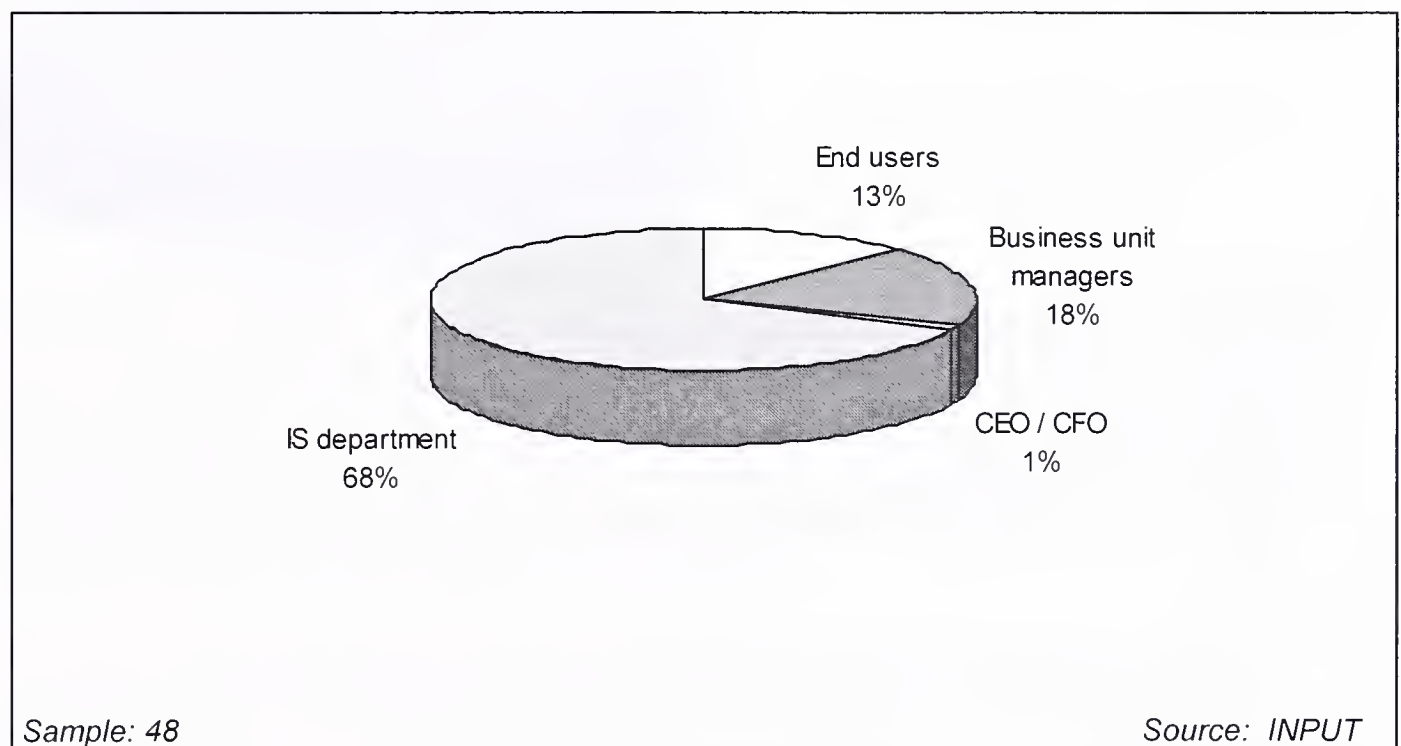
C

Expected Change in Intranet Budgets

Exhibit X-4 shows how Owners and Builders expect their Intranet budgets to change over the next two years. Unsurprisingly, most users expect their Intranet budget to increase, but the size of the majority is emphatic. Even including organizations who have completed their Intranet development, only five percent expect no increase in budget, and no respondents expect a decrease.

Exhibit X-4

Expected Change in Intranet Budget, 1997-1999 (Intranet Owners and Builders)

Stay same
5%

Decrease
0%

Increase
95%
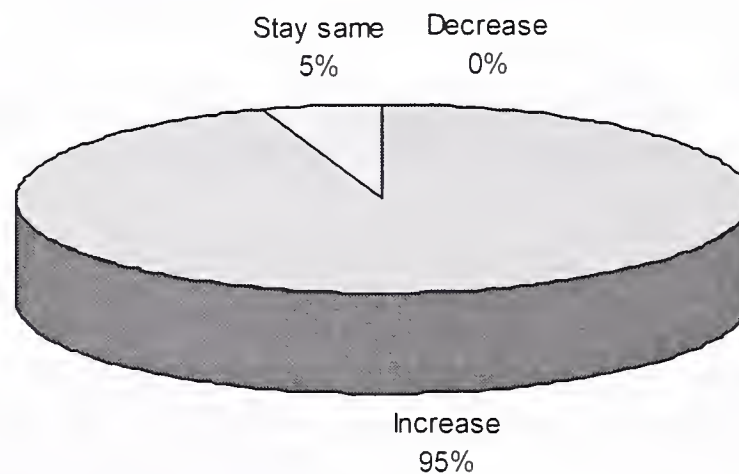
Sample: 58   *Source: INPUT*

XI

Obstacles to Intranet Development

Exhibits XI-1 and XI-2 show the obstacles faced or perceived by Intranet Owners/Builders and Evaluators respectively in their Intranet development projects and considerations.

The most commonly stated obstacles are organizational (with the possible exception of security issues, named by a quarter of Owners/Builders): funding, prioritization, in-house resource and commitment issues.

Due to the additive nature of Intranet development, whereby Intranets are overlaid on top of existing networks and applications rather than replacing them, at least in the short term, IT resources become stretched. Intranets must often be developed alongside legacy and client/server infrastructure and applications, with few, if any, extra resources. This, plus the fact that much Intranet technology is new to the market, leads to skills shortage, prioritization conflicts, and funding problems.

Lack of external Intranet services is not considered a problem by any category of user. Unlike Intranet products, however, use of services is optional. Many Intranets have been developed internally, without recourse to external services, and so lack of available services would not be an obstacle for many organisations, regardless of whether such a lack existed or not. This finding does not show, therefore, that there is an abundance of Intranet service offerings. Instead, it shows that if there is not an abundance, that is not perceived as a major problem.

Exhibit XI-1

Obstacles to Intranet Development
(Intranet Owners and Builders)

Sample: 62   Source: INPUT
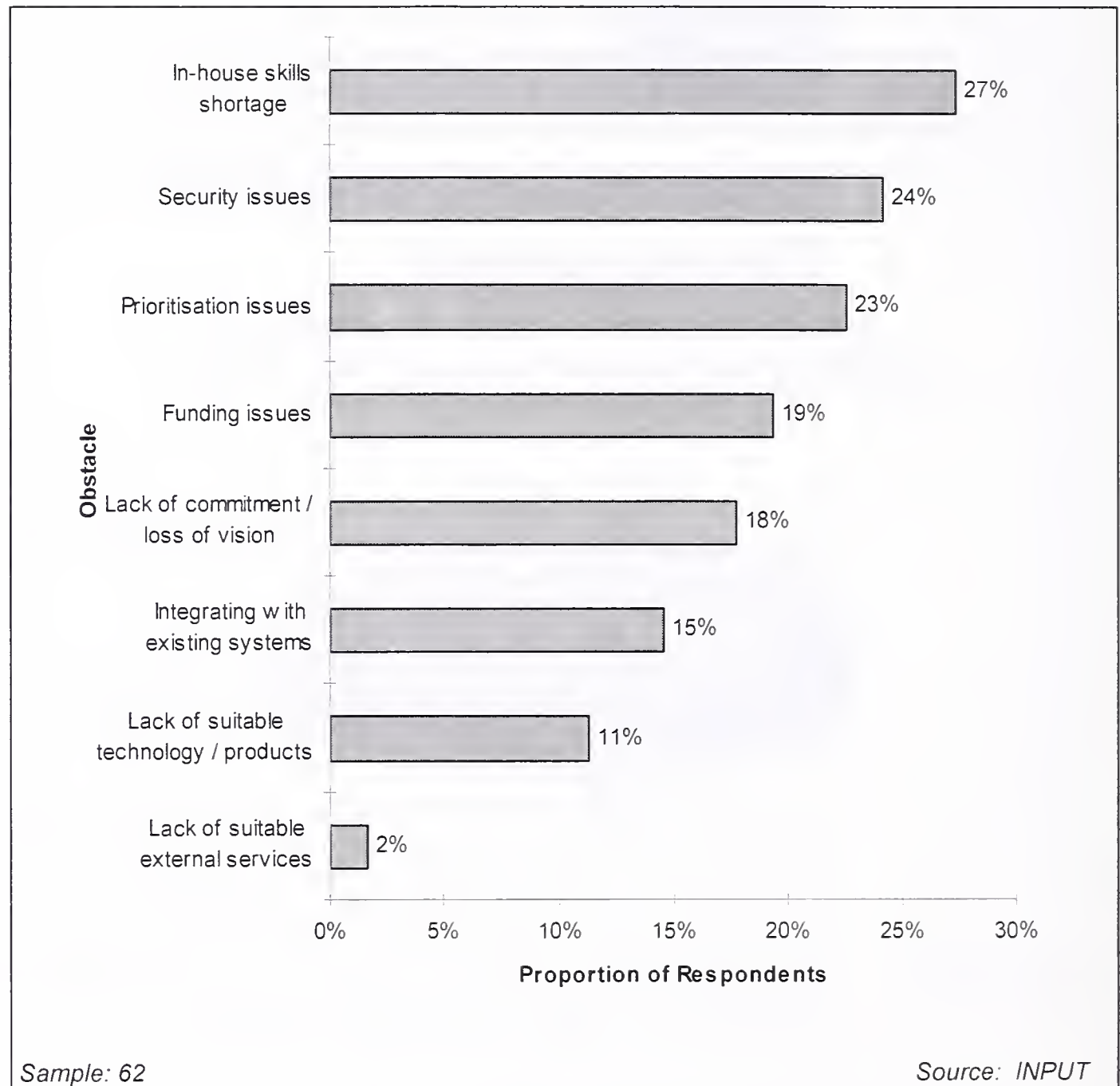
Exhibit XI-2

Perceived Obstacles to Intranet Development
(Intranet Evaluators)

Obstacle (y-axis), **Proportion of Respondents** (x-axis)

- Funding issues: 36%
- Lack of commitment / loss of vision: 25%
- Prioritisation issues: 21%
- Security issues: 18%
- In-house skills shortage: 18%
- Integrating with existing systems: 14%
- Lack of suitable technology / products: 7%
- Lack of suitable external services: 0%

Sample: 28   *Source: INPUT*
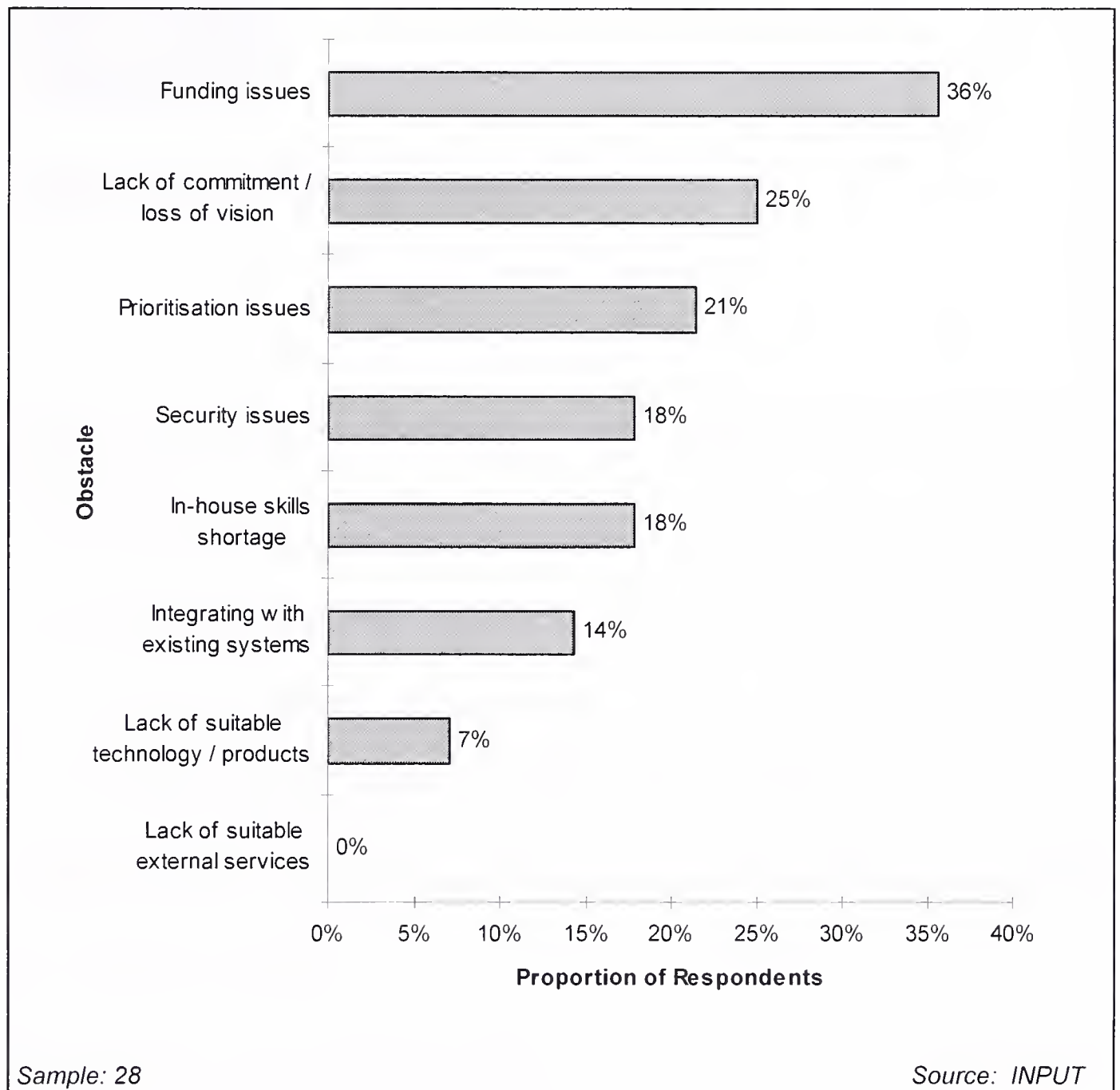
(Blank)

XII

Intranet Rejectors

Eight Intranet Rejectors stated their reasons for deciding not to implement an Intranet:

- Insufficient funds—three respondents

- Not enough benefit—two respondents

- Immature technology—one respondent

- Unconfident about long-term viability—one respondent

The following reasons were given to respondents as possible choices but were not named by any organization:

- Lack of awareness

- Lack of external Intranet services

- Poor quality of external Intranet services

- Security risks

Other comments made by respondents for deciding against an Intranet were:

- "No need" or "not necessary" (three respondents)

- "not enough time"

- "Other priorities"

- "We're just behind"

- "We are too busy to implement an Intranet"

Respondents were asked to describe the circumstances under which they would reconsider building an Intranet. The comments they made were as follows:

- "Only if it would increase productivity"

- "We would have to find an application that would benefit the company"

- "Only if a need arose"

- "If there was a need to link other locations. Other locations are currently independent"

- "When we feel we will benefit enough to cover the cost"

- "If business case to do it is found"

XIII

Market Forecasts

Exhibits XIII-1 to XIII-4 show the U.S. markets for Intranet-related:

- Systems integration—provision of a complete Intranet solution, including project management and single point-of-contact. Intranet systems integration may cover development of a 'standalone' Intranet, distinct from existing IT infrastructure, or may cover integration of existing IT with an Intranet

- Professional services—provision of Intranet-related custom software development, consultancy, and education and training

- Systems software products—sales of products designed to provide Intranet infrastructure, for example: TCP/IP stacks, object frameworks and middleware

- Application software products—sales of products designed to support operational or administrative business processes, including cross-industry and industry-specific software

Exhibit XIII-1

U.S. Intranet Systems Integration Market, 1997-2001

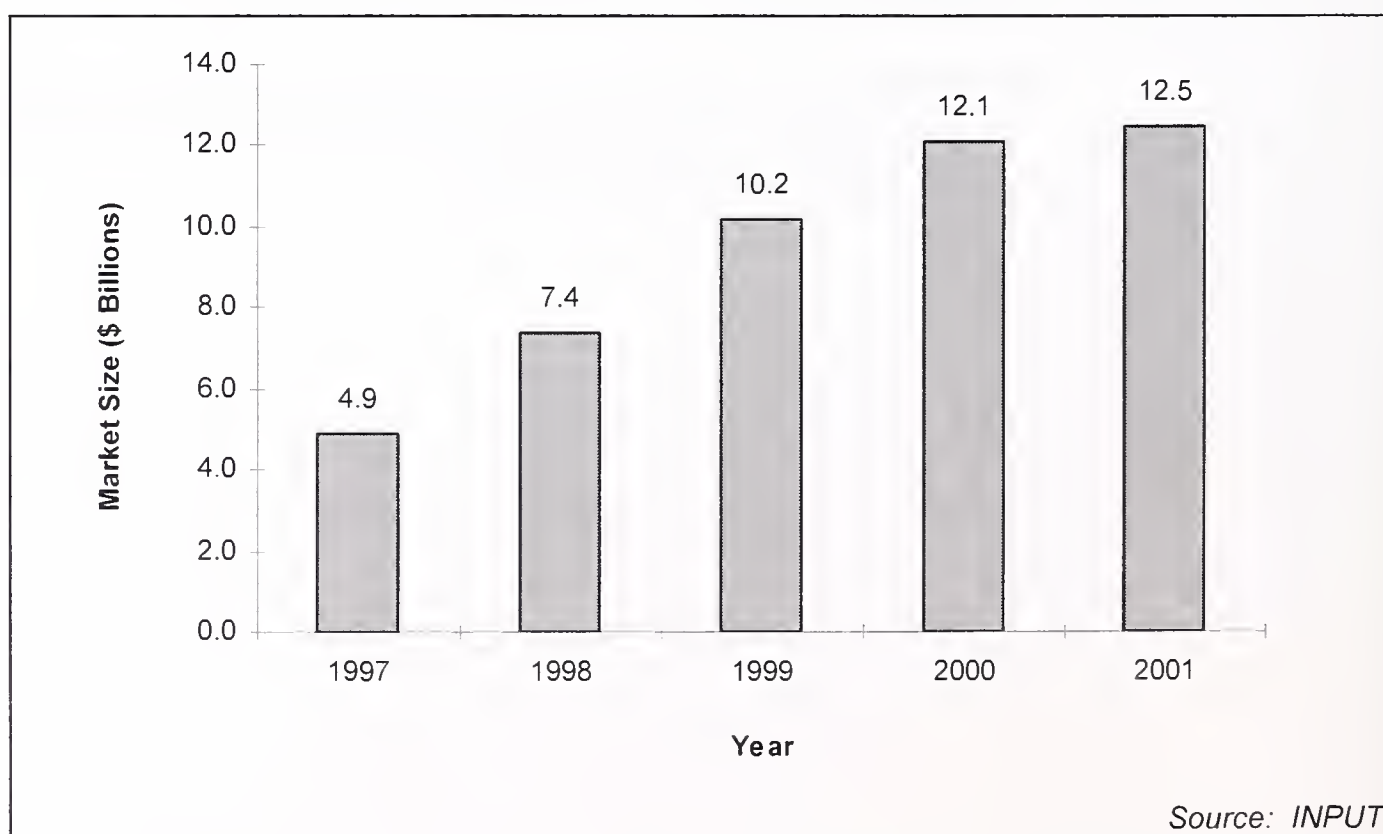Source: INPUT
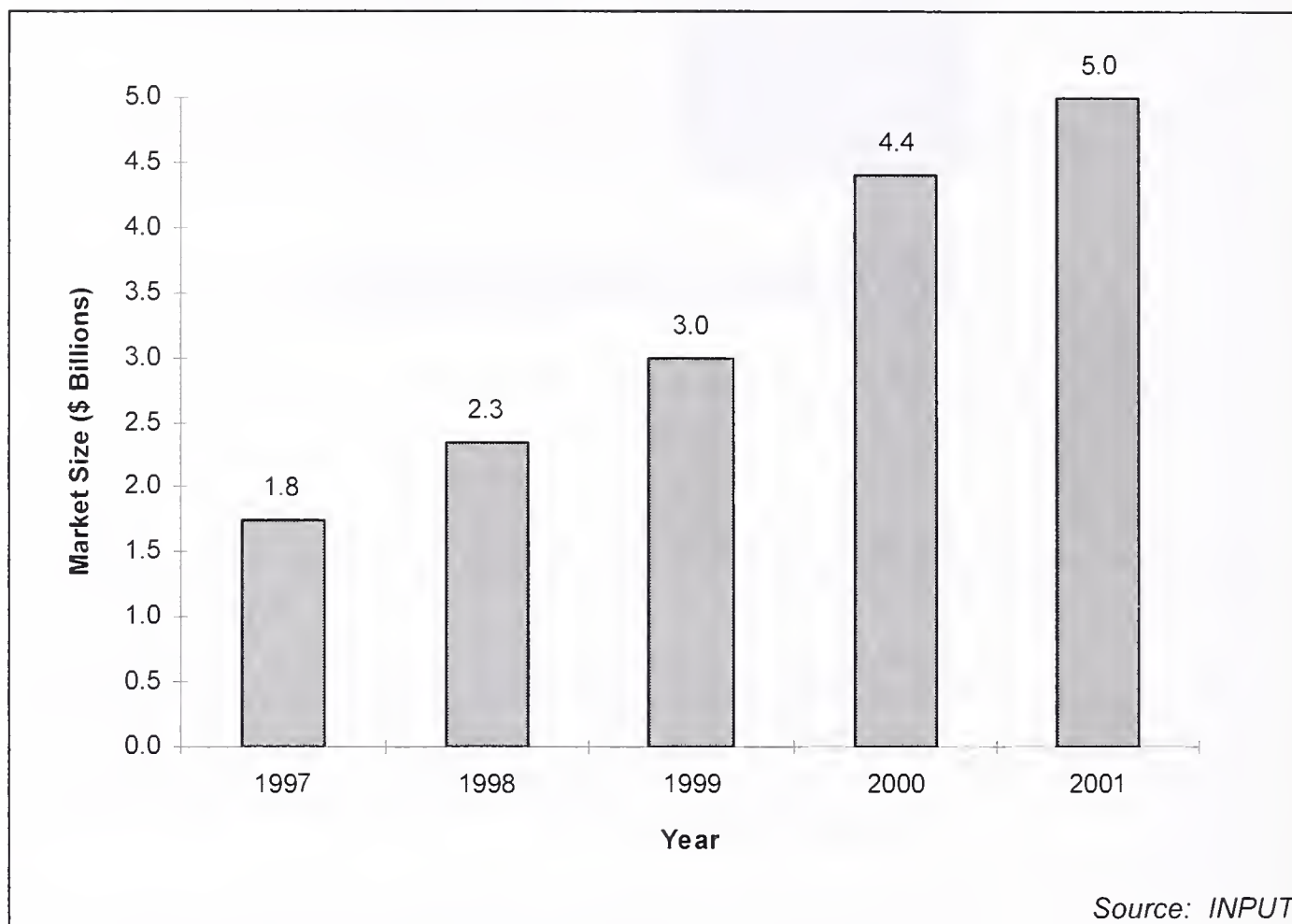
Exhibit XIII-2

U.S. Intranet Professional Services Market, 1997-2001

Source: INPUT

Exhibit XIII-3

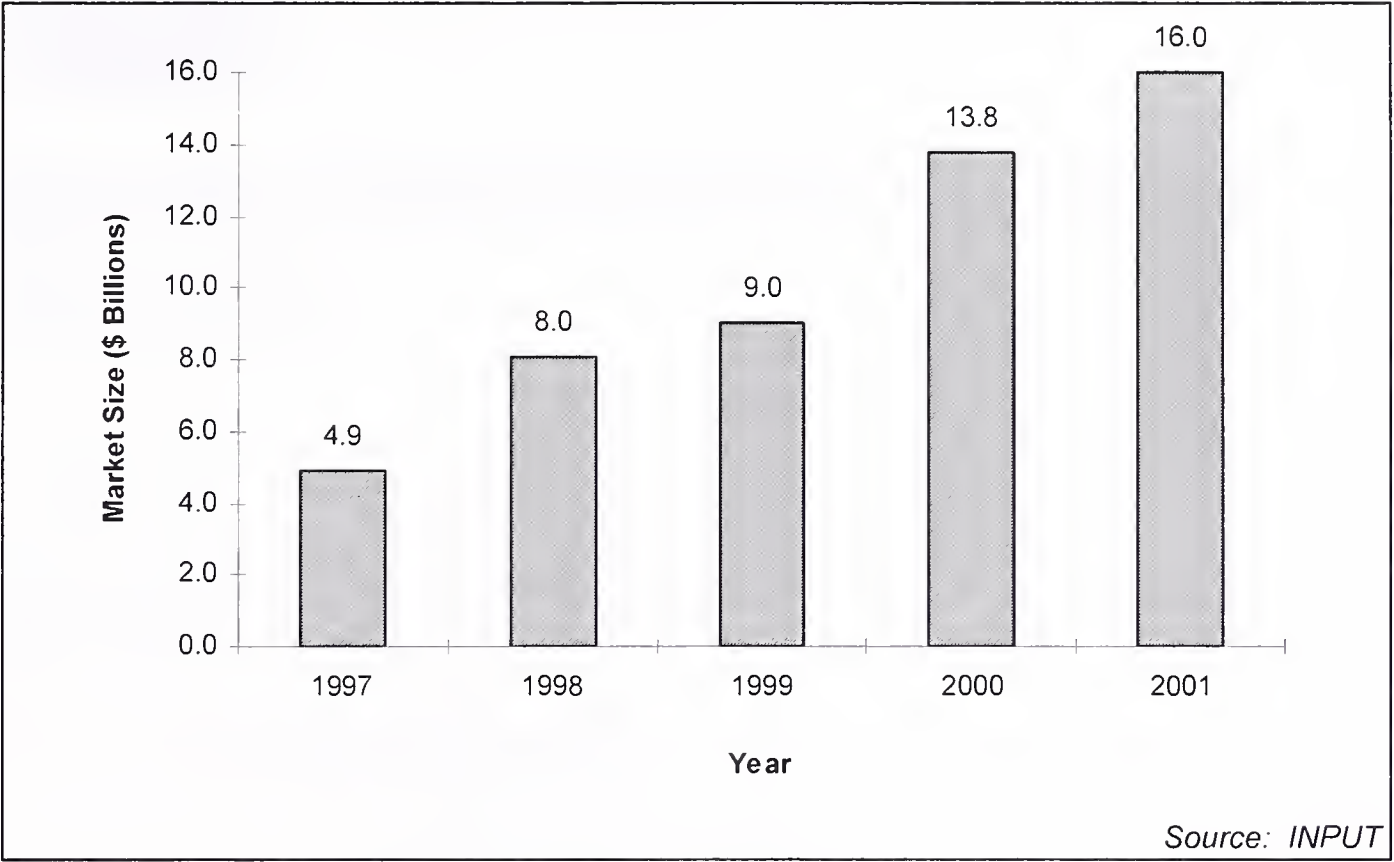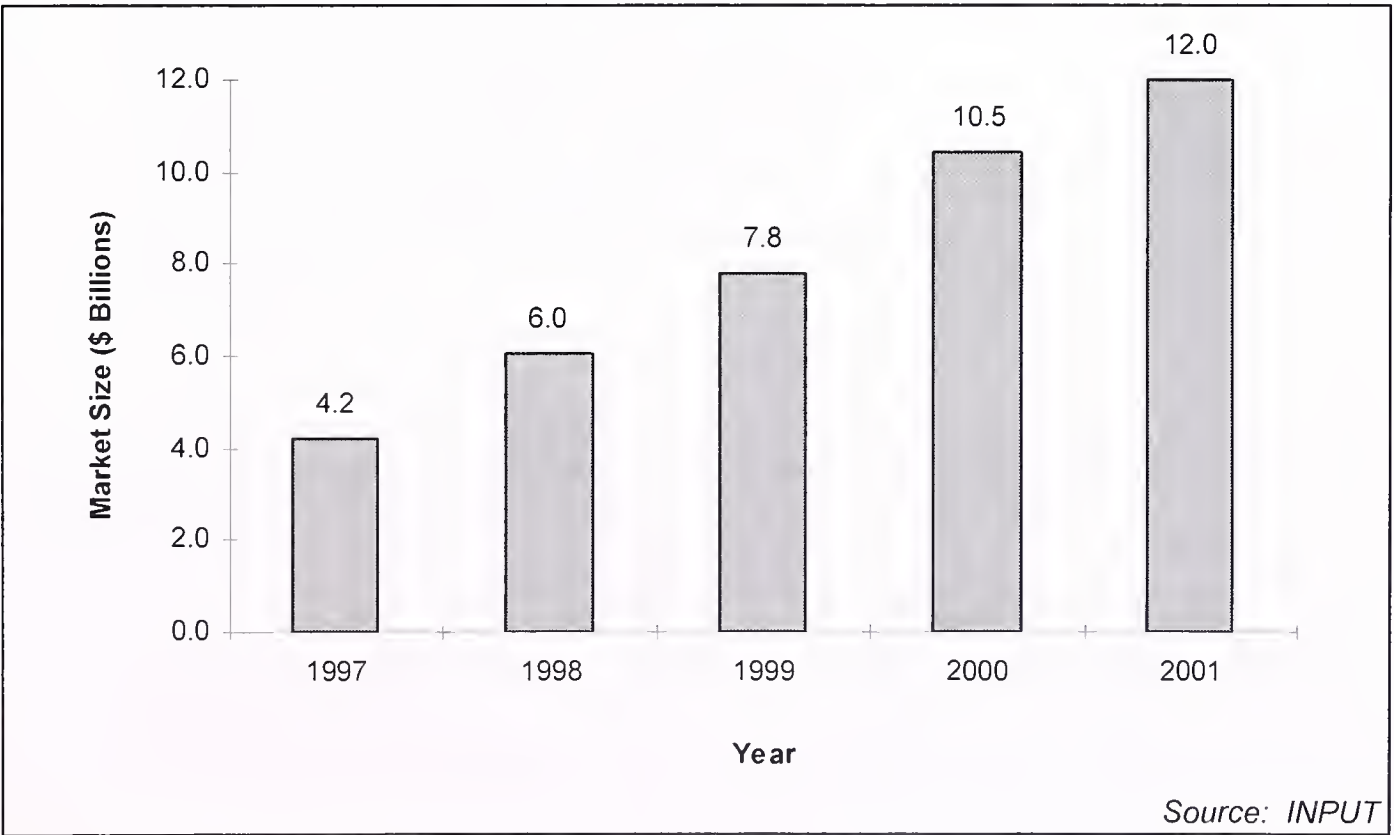## U.S. Intranet System Software Product Market, 1997-2001

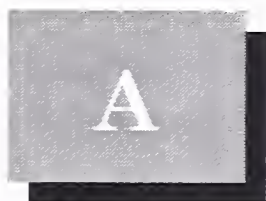*Source: INPUT*

Exhibit XIII-4

U.S. Intranet Application Software
Product Market, 1997-2001

Source: INPUT

(Blank)

Survey Questionnaire—Intranet Owners

A1. What were the main reasons for you developing an Intranet? *(Tick all that apply)*

To solve a business problem	[ ]
(If so, what problem?)	

_____

_____

Cost-saving	[ ]
Integrating existing systems	[ ]
Integrating with current or future Web front ends	[ ]
Business process re-engineering	[ ]
Ease of access to all types of information	[ ]
Uniformity / standardisation of platforms	[ ]
Enabling access to / from outside world	[ ]
As an ongoing infrastructure upgrade	[ ]
To prepare for future technology / applications	[ ]
Other *(specify)*	

_____

_____

A2. What priority does your Intranet have compared with your other IT investments in terms of:

	Low	Medium	High
Implementation	[ ]	[ ]	[ ]
On-going support	[ ]	[ ]	[ ]
Application development	[ ]	[ ]	[ ]

A3. What effect is your Intranet most likely to have over the next two years?
(Tick only one)

Intranet will gradually displace existing systems	[ ]
Intranet will quickly displace existing systems	[ ]
Intranet will integrate with existing systems	[ ]
Intranet will have little or no effect on existing systems	[ ]
Other *(specify)* _____	[ ]

A4. How strongly is your Intranet development influenced by the 'Year 2000'
issue? *(1=not influenced, 5=strongly influenced)*

1 2 3 4 5

A5. What is the size of your Intranet? *(Either as number of users/seats or as
percentage of all employees)*

_____

A6. What primary desktop clients are used to access your Intranet today,
and how do you expect their use to change over the next two years? *(Tick all
that apply)*

	Today	Increase	Decrease	Stay same
MS Windows	[ ]	[ ]	[ ]	[ ]
UNIX	[ ]	[ ]	[ ]	[ ]
Apple Macintosh	[ ]	[ ]	[ ]	[ ]
OS/2	[ ]	[ ]	[ ]	[ ]
X terminal	[ ]	[ ]	[ ]	[ ]
Mainframe terminal	[ ]	[ ]	[ ]	[ ]
Network Computer	[ ]	[ ]	[ ]	[ ]
Other	[ ]	[ ]	[ ]	[ ]
(specify) _____				
Other	[ ]	[ ]	[ ]	[ ]
(specify) _____				

A7. What servers do you use to run your Intranet today and how do you
expect their use to change over the next two years? *(Tick all that apply)*

	Today	Increase	Decrease	Stay same
Windows NT	[ ]	[ ]	[ ]	[ ]
UNIX midrange	[ ]	[ ]	[ ]	[ ]
UNIX enterprise	[ ]	[ ]	[ ]	[ ]
Mainframe	[ ]	[ ]	[ ]	[ ]

Other	[ ]	[ ]	[ ]	[ ]

(specify) _____

A8. Whose Web server do you use primarily and why? *(Tick only one; very short answers are OK)*

		Why
Netscape	[ ]	_____
Microsoft	[ ]	_____
Novell	[ ]	_____
Lotus	[ ]	_____
Open Market	[ ]	_____
NCSA	[ ]	_____
CERN	[ ]	_____
Other	[ ]	_____

(specify) _____

A9. What clients are used to access your Intranet and why? *(Tick all that apply; very short answers are OK))*

		Why
Netscape Navigator	[ ]	_____
Microsoft Internet Explorer	[ ]	_____
Microsoft Office	[ ]	_____
Lotus Notes client	[ ]	_____
Novell Groupwise	[ ]	_____
Other	[ ]	_____

(specify) _____

A10. What applications are you currently using over your Intranet, and are they accessed by the user from a Web browser or from an existing front-end? *(Tick all that apply)*

	Are using	Browser	F-E
ERP (eg SAP)	[ ]	[ ]	[ ]
Project management / workflow	[ ]	[ ]	[ ]
Group collaboration / conferencing	[ ]	[ ]	[ ]
Sales force automation	[ ]	[ ]	[ ]
EIS	[ ]	[ ]	[ ]
Internal information distribution	[ ]	[ ]	[ ]
Purchasing / inventory	[ ]	[ ]	[ ]
General office applications	[ ]	[ ]	[ ]
Other *(specify)* _____		[ ]	[ ]
Other *(specify)* _____		[ ]	[ ]

A11. For non-trivial Intranet application development, which development tools did you use, and which do you intend to use in the future? *(Tick all that apply)*

	Did use	Will use in future
Java	[ ]	[ ]
ActiveX	[ ]	[ ]
Javascript	[ ]	[ ]
CGI (eg, Perl)	[ ]	[ ]
Other *(specify)*	_____	_____
Other *(specify)*	_____	_____
Other *(specify)*	_____	_____

A12. What do you use to manage your Intranet? *(Tick all that apply)*

Specific Intranet / Web server management tool   [ ]
General network management tool   [ ]
Manual monitoring / management   [ ]
Nothing specifically   [ ]
Other *(specify)*   _____ [ ]

_____

A13. What levels of connectivity does your Intranet support? *(Tick all that apply)*

Is connected to public Internet   [ ]
Supports home workers   [ ]
Supports mobile workers   [ ]
Allows access to / from other organisations' Intranets   [ ]

A14. What is the level of sensitivity of the most sensitive data on your Intranet? *(Tick only one)*

Low *(e.g. open)*   [ ]
Medium *(e.g. private)*   [ ]
High *(e.g. confidential)*   [ ]

A15. What is the level of criticality of the most critical applications you run on your Intranet? *(Tick only one)*

Low *(e.g. not critical)*   [ ]
Medium *(e.g. business process-critical)*   [ ]
High *(e.g. mission-critical)*   [ ]

A16. Do you currently route financial transactions over your Intranet?

Yes   [ ]
No   [ ]

A17. Which of the following Intranet services did you use from external service providers and who were those providers? *(Tick all that apply)*

		Which provider?
Business strategy / benefits consultancy	[ ]	
Network / infrastructure consultancy	[ ]	
Network / infrastructure implementation	[ ]	
Application consultancy	[ ]	
Application implementation	[ ]	
Intranet Web site design / creation	[ ]	
Integration of Intranet with existing systems	[ ]	
Security consultancy / implementation	[ ]	
Education and training	[ ]	

A18. How important were the following services in your Intranet development? *(1=not important, 5=very important)*

Business strategy / benefits consultancy	1 2 3 4 5 N/A
Network / infrastructure consultancy	1 2 3 4 5 N/A
Network / infrastructure implementation	1 2 3 4 5 N/A
Application consultancy	1 2 3 4 5 N/A
Application implementation	1 2 3 4 5 N/A
Intranet Web site design / creation	1 2 3 4 5 N/A
Integration of Intranet with existing systems	1 2 3 4 5 N/A
Security consultancy / implementation	1 2 3 4 5 N/A
Education and training	1 2 3 4 5 N/A

A19. How satisfied were you with the services you received? *(1=not satisfied, 5=very satisfied)*

Business strategy / benefits consultancy   1 2 3 4 5 N/A

Network / infrastructure consultancy	1 2 3 4 5 N/A
Network / infrastructure implementation	1 2 3 4 5 N/A
Application consultancy	1 2 3 4 5 N/A
Application implementation	1 2 3 4 5 N/A
Intranet Web site design / creation	1 2 3 4 5 N/A
Integration of Intranet with existing systems	1 2 3 4 5 N/A
Security consultancy / implementation	1 2 3 4 5 N/A
Education and training	1 2 3 4 5 N/A

A20. How could these external services be improved?

Business strategy / benefits consultancy

_____

Network / infrastructure consultancy

_____

Network / infrastructure implementation

_____

Application consultancy

_____

Application implementation

_____

Intranet Web site design / creation

_____

Integration of Intranet with existing systems

_____

Security consultancy / implementation

_____

Education and training

_____

A21. Please break out your Intranet application software development
sources *(must add up to 100%)*

In-house development	_____ %
Third-party custom development	_____ %
Off-the-shelf purchase	_____ %

A22. How many of your IS staff have been significantly involved with your
Intranet development and what proportion of your total IS staff does that
represent?

Number of IS staff	_____
Proportion of total IS staff	_____ %

A23. Do you intend to, or do you already outsource your Intranet operation? *(Tick only one)*

       Yes   [ ]
       No   [ ]

A24. Please describe briefly how Intranet end users are supported / motivated through documentation, training, or other means

_____

_____

_____

_____

_____

A25. Please list any Intranet-related services you require but have not found on offer

_____

_____

_____

_____

_____

A26. Overall, do you favour: *(Tick only one)*

       A 'one-stop-shop' Intranet implementation service   [ ]
       A mix of suppliers' services at your discretion   [ ]

DEVELOPMENT ISSUES

A27. Which departments have gained significant benefit from your Intranet? *(Tick all that apply)*

       Sales   [ ]
       Marketing   [ ]
       Customer service   [ ]
       Engineering / R&D   [ ]
       HR / personnel   [ ]
       Administration   [ ]
       Executive / senior management   [ ]
       Finance / accounting   [ ]
       Other *(specify)*   [ ]   _____
       Other *(specify)*   [ ]   _____
       Other *(specify)*   [ ]   _____

A28. Which of the following initiated, and which played a major role in your Intranet? *(Tick all that apply)*

	Initiated	Played major role
End users	[ ]	[ ]
Business unit managers	[ ]	[ ]
CEO / Financial Director	[ ]	[ ]
IS department	[ ]	[ ]
Other *(specify)*	[ ]	[ ] _____

A29. Please describe your Intranet budget. E.g., was it set by corporate HQ or by local offices? If you had budgetary control, how did you allocate it? Are budget decisions made in the UK or outside? Etc.

_____

_____

_____

_____

A30. Please break out the sources of your Intranet budget *(must add up to 100%)*

End users	_____ %
Business unit managers	_____ %
CEO / Financial Director	_____ %
IS department	_____ %
Other *(specify)*	_____ _____ %

A31. Do you expect your Intranet budget to grow or shrink over the next two years, and by approximately how much?

		By how much *(Get change in % or £)*
Grow	[ ]	_____
Shrink	[ ]	_____
Stay same	[ ]	

A32. Did your Intranet development end up: *(Tick only one)*

Ahead of time	[ ]
Behind time	[ ]
On time	[ ]

A33. If it was ahead or behind time:

| By how much? | _____ |
| And why? | _____ |

_____

_____

A34. Did your Intranet development end up: *(Tick only one)*

     Under budget [ ]
     Over budget   [ ]
     On budget   [ ]

A35. If it was under or over budget:

     By how much?   _____
     And why?   _____

                        _____

                        _____

A36. What obstacles did you face in building your Intranet? Please briefly describe them *(very short answers are OK)*

		Description
Funding issues	[ ]	_____
Lack of commitment / loss of vision	[ ]	_____
In-house skills shortage	[ ]	_____
Integrating with existing systems	[ ]	_____
Prioritisation issues	[ ]	_____
Lack of suitable technology / products	[ ]	_____
Lack of suitable external services	[ ]	_____
Security issues	[ ]	_____
Other *(specify)* _____	[ ]	_____

A37. How integrated are your existing systems with your Intranet now, and how integrated do you expect them to be in two years from now? *(1=not integrated at all, 5=totally integrated)*

     Now   Two years from now
     1 2 3 4 5   1 2 3 4 5

A38. If 'Now' is 3, 4, or 5, please describe briefly how you achieved this integration (tools used, services employed, etc.)

_____

_____

_____

_____

(Blank)

B
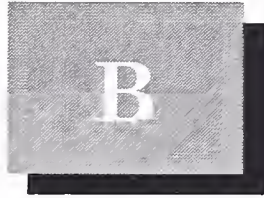
Survey Questionnaire—Intranet Builders

B1. Approximately how much of your Intranet implementation have you accomplished? *(0-100%)*

_____ %

B2. When do you expect your Intranet to be operational? *(Month/year)*

_____

B3. What are the main reasons for you developing an Intranet? *(Tick all that apply)*

To solve a business problem	[ ]
(If so, what problem?)	

_____

_____

Cost-saving	[ ]
Integrating existing systems	[ ]
Integrating with current or future Web front ends	[ ]
Business process re-engineering	[ ]
Ease of access to all types of information	[ ]
Uniformity / standardisation of platforms	[ ]
Enabling access to / from outside world	[ ]
As an ongoing infrastructure upgrade	[ ]
To prepare for future technology / applications	[ ]
Other *(specify)*	

_____

_____

B4. What priority does your Intranet have compared with your other IT investments in terms of:

	Low	Medium	High
Implementation	[ ]	[ ]	[ ]
On-going support	[ ]	[ ]	[ ]
Application development	[ ]	[ ]	[ ]

B5. What effect is your Intranet most likely to have over the next two years? *(Tick only one)*

Intranet will gradually displace existing systems	[ ]
Intranet will quickly displace existing systems	[ ]
Intranet will integrate with existing systems	[ ]
Intranet will have little or no effect on existing systems	[ ]
Other *(specify)* _____	[ ]

B6. How strongly is your Intranet development influenced by the 'Year 2000' issue? *(1=not influenced, 5=strongly influenced)*

1 2 3 4 5

B7. What will be the size of your Intranet? *(Either as number of users/seats or as percentage of all employees)*

_____

B8. What primary desktop clients will be used to access your Intranet today, and how do you expect their use to change over the next two years? *(Tick all that apply)*

	Will use	Increase	Decrease	Stay same
MS Windows	[ ]	[ ]	[ ]	[ ]
UNIX	[ ]	[ ]	[ ]	[ ]
Apple Macintosh	[ ]	[ ]	[ ]	[ ]
OS/2	[ ]	[ ]	[ ]	[ ]
X terminal	[ ]	[ ]	[ ]	[ ]
Mainframe terminal	[ ]	[ ]	[ ]	[ ]
Network Computer	[ ]	[ ]	[ ]	[ ]
Other	[ ]	[ ]	[ ]	[ ]
(specify) _____				
Other	[ ]	[ ]	[ ]	[ ]
(specify) _____				

B9. What servers will you use to run your Intranet and how do you expect their use to change over the next two years? *(Tick all that apply)*

	Will use	Increase	Decrease	Stay same
Windows NT	[ ]	[ ]	[ ]	[ ]
UNIX midrange	[ ]	[ ]	[ ]	[ ]
UNIX enterprise	[ ]	[ ]	[ ]	[ ]
Mainframe	[ ]	[ ]	[ ]	[ ]
Other	[ ]	[ ]	[ ]	[ ]

(specify) _____

B10. Whose Web server will you use primarily and why? *(Tick only one; very short answers are OK)*

		Why
Netscape	[ ]	_____
Microsoft	[ ]	_____
Novell	[ ]	_____
Lotus	[ ]	_____
Open Market	[ ]	_____
NCSA	[ ]	_____
CERN	[ ]	_____
Other	[ ]	_____

(specify) _____

B11. What clients will be used to access your Intranet and why? *(Tick all that apply; very short answers are OK)*

		Why
Netscape Navigator	[ ]	_____
Microsoft Internet Explorer	[ ]	_____
Microsoft Office	[ ]	_____
Lotus Notes client	[ ]	_____
Novell Groupwise	[ ]	_____
Other	[ ]	_____

(specify) _____

B12. What applications will you use over your Intranet, and will they be accessed by the user from a Web browser or from an existing front-end? *(Tick all that apply)*

	Will use	Browser	F-E
ERP (eg SAP)	[ ]	[ ]	[ ]
Project management / workflow	[ ]	[ ]	[ ]
Group collaboration / conferencing	[ ]	[ ]	[ ]

Sales force automation	[ ]	[ ]	[ ]
EIS	[ ]	[ ]	[ ]
Internal information distribution	[ ]	[ ]	[ ]
Purchasing / inventory	[ ]	[ ]	[ ]
General office applications	[ ]	[ ]	[ ]
Other *(specify)* _____		[ ]	[ ]
Other *(specify)* _____		[ ]	[ ]

B13. For non-trivial Intranet application development, which development tools are you using, and which do you intend to use in the future? *(Tick all that apply)*

	Did use	Will use in future
Java	[ ]	[ ]
ActiveX	[ ]	[ ]
Javascript	[ ]	[ ]
CGI (eg, Perl)	[ ]	[ ]
Other *(specify)*	_____	_____
Other *(specify)*	_____	_____
Other *(specify)*	_____	_____

B14. What do you intend to use to manage your Intranet? *(Tick all that apply)*

Specific Intranet / Web server management tool	[ ]
General network management tool	[ ]
Manual monitoring / management	[ ]
Nothing specifically	[ ]
Other *(specify)* _____	[ ]

_____

B15. What levels of connectivity will your Intranet support? *(Tick all that apply)*

Will be connected to public Internet	[ ]
Will support home workers	[ ]
Will support mobile workers	[ ]
Will allows access to / from other organisations' Intranets	[ ]

B16. What is the level of sensitivity of the most sensitive data on your Intranet? *(Tick only one)*

Low *(e.g. open)*	[ ]
Medium *(e.g. private)*	[ ]
High *(e.g. confidential)*	[ ]

B17. What is the level of criticality of the most critical applications you run on your Intranet? *(Tick only one)*

Low *(e.g. not critical)*	[ ]
Medium *(e.g. business process-critical)*	[ ]
High *(e.g. mission-critical)*	[ ]

B18. Will you be routing financial transactions over your Intranet?

Yes	[ ]
No	[ ]

B19. Which of the following Intranet services are you using from external service providers and who are those providers? *(Tick all that apply)*

	Which provider?
Business strategy / benefits consultancy	[ ]
_____	
Network / infrastructure consultancy	[ ]
_____	
Network / infrastructure implementation	[ ]
_____	
Application consultancy	[ ]
_____	
Application implementation	[ ]
_____	
Intranet Web site design / creation	[ ]
_____	
Integration of Intranet with existing systems	[ ]
_____	
Security consultancy / implementation	[ ]
_____	
Education and training	[ ]
_____	

B20. How important are the following services in your Intranet development? *(1=not important, 5=very important)*

Business strategy / benefits consultancy	1 2 3 4 5 N/A
Network / infrastructure consultancy	1 2 3 4 5 N/A
Network / infrastructure implementation	1 2 3 4 5 N/A
Application consultancy	1 2 3 4 5 N/A
Application implementation	1 2 3 4 5 N/A
Intranet Web site design / creation	1 2 3 4 5 N/A
Integration of Intranet with existing systems	1 2 3 4 5 N/A

Security consultancy / implementation	1 2 3 4 5 N/A
Education and training	1 2 3 4 5 N/A

B21. How satisfied are you with the services received so far? *(1=not satisfied, 5=very satisfied)*

Business strategy / benefits consultancy	1 2 3 4 5 N/A
Network / infrastructure consultancy	1 2 3 4 5 N/A
Network / infrastructure implementation	1 2 3 4 5 N/A
Application consultancy	1 2 3 4 5 N/A
Application implementation	1 2 3 4 5 N/A
Intranet Web site design / creation	1 2 3 4 5 N/A
Integration of Intranet with existing systems	1 2 3 4 5 N/A
Security consultancy / implementation	1 2 3 4 5 N/A
Education and training	1 2 3 4 5 N/A

B22. How could these external services be improved?
Business strategy / benefits consultancy

_____

Network / infrastructure consultancy

_____

Network / infrastructure implementation

_____

Application consultancy

_____

Application implementation

_____

Intranet Web site design / creation

_____

Integration of Intranet with existing systems

_____

Security consultancy / implementation

_____

Education and training

_____

B23. Please break out your Intranet application software development sources *(must add up to 100%)*

In-house development	_____ %
Third-party custom development	_____ %
Off-the-shelf purchase	_____ %

B24. How many of your IS staff are significantly involved with your Intranet development and what proportion of your total IS staff does that represent?

Number of IS staff   _____

Proportion of total IS staff   _____ %

B25. Do you intend to outsource your Intranet operation? *(Tick only one)*

Yes   [ ]

No   [ ]

B26. Please describe briefly how Intranet end users will be supported / motivated through documentation, training, or other means

_____

_____

_____

_____

_____

B27. Please list any Intranet-related services you require but have not found on offer

_____

_____

_____

_____

_____

B28. Overall, do you favour: *(Tick only one)*

A 'one-stop-shop' Intranet implementation service   [ ]

A mix of suppliers' services at your discretion   [ ]

B29. Which departments are expected to gain significant benefit from your Intranet? *(Tick all that apply)*

Sales   [ ]

Marketing   [ ]

Customer service   [ ]

Engineering / R&D   [ ]

HR / personnel   [ ]

Administration   [ ]

Executive / senior management   [ ]

Finance / accounting   [ ]

Other *(specify)*   [ ]   _____

Other *(specify)*   [ ]   _____

Other *(specify)*   [ ]   _____

B30. Which of the following initiated, and which are playing a major role in your Intranet? *(Tick all that apply)*

	Initiated	Playing major role
End users	[ ]	[ ]
Business unit managers	[ ]	[ ]
CEO / Financial Director	[ ]	[ ]
IS department	[ ]	[ ]
Other *(specify)*	[ ]	[ ] _____

B31. Please describe your Intranet budget. E.g., was it set by corporate HQ or by local offices? If you had budgetary control, how did you allocate it? Are budget decisions made in the UK or outside? Etc.

_____

_____

_____

_____

B32. Please break out the sources of your Intranet budget *(must add up to 100%)*

End users	_____ %
Business unit managers	_____ %
CEO / Financial Director	_____ %
IS department	_____ %
Other *(specify)*	_____ _____ %

B33. Do you expect your Intranet budget to grow or shrink over the next two years, and by approximately how much?

		By how much *(Get change in % or £)*
Grow	[ ]	_____
Shrink	[ ]	_____
Stay same	[ ]	

B34. Do you expect your Intranet development to end up: *(Tick only one)*

Ahead of time	[ ]
Behind time	[ ]
On time	[ ]

B35. If ahead or behind time:

By how much?	_____
And why?	_____
	_____

B36. Do you expect your Intranet development to end up: *(Tick only one)*

Under budget	[ ]
Over budget	[ ]
On budget	[ ]

B37. If under or over budget:

By how much?   _____

And why?   _____

_____

_____

B38. What obstacles do you expect to face in building your Intranet? Please briefly describe them *(very short answers are OK)*

		Description
Funding issues	[ ]	_____
Lack of commitment / loss of vision	[ ]	_____
In-house skills shortage	[ ]	_____
Integrating with existing systems	[ ]	_____
Prioritisation issues	[ ]	_____
Lack of suitable technology / products	[ ]	_____
Lack of suitable external services	[ ]	_____
Security issues	[ ]	_____
Other *(specify)* _____	[ ]	_____

B39. How integrated will your existing systems be with your Intranet, and how integrated do you expect them to be in two years from now? *(1=not integrated at all, 5=totally integrated)*

Will be	Two years from now
1 2 3 4 5	1 2 3 4 5

B40. If 'Will be' is 3, 4, or 5, please describe briefly how you will achieve this integration (tools used, services employed, etc.)

_____

_____

(Blank)

C

Survey Questionnaire—Intranet Evaluators

C1. Approximately when do you expect to have decided whether to develop an Intranet or not? *(Month/year)*

_____

C2. What are the main reasons for you considering an Intranet? *(Tick all that apply)*

To solve a business problem	[ ]
(If so, what problem?)	

_____

_____

Cost-saving	[ ]
Integrating existing systems	[ ]
Integrating with current or future Web front ends	[ ]
Business process re-engineering	[ ]
Ease of access to all types of information	[ ]
Uniformity / standardisation of platforms	[ ]
Enabling access to / from outside world	[ ]
As an ongoing infrastructure upgrade	[ ]
To prepare for future technology / applications	[ ]
Other *(specify)*	

_____

_____

C3. How widespread would you expect an Intranet in your organisation to be? *(Either as number of users/seats or as percentage of all employees)*

_____

C4. What applications would you use over an Intranet, and would they most likely be accessed by the user from a Web browser or from an existing front-end? *(Tick all that apply)*

	Would use	Browser	F-E
ERP (eg SAP)	[ ]	[ ]	[ ]
Project management / workflow	[ ]	[ ]	[ ]
Group collaboration / conferencing	[ ]	[ ]	[ ]
Sales force automation	[ ]	[ ]	[ ]
EIS	[ ]	[ ]	[ ]
Internal information distribution	[ ]	[ ]	[ ]
Purchasing / inventory	[ ]	[ ]	[ ]
General office applications	[ ]	[ ]	[ ]
Other *(specify)* _____		[ ]	[ ]
Other *(specify)* _____		[ ]	[ ]

C5. What effect would an Intranet in your organisation be most likely to have over the next two years? *(Tick only one)*

Intranet will gradually displace existing systems	[ ]
Intranet will quickly displace existing systems	[ ]
Intranet will integrate with existing systems	[ ]
Intranet will have little or no effect on existing systems	[ ]
Other *(specify)* _____	[ ]

C6. What levels of connectivity would your Intranet support? *(Tick all that apply)*

Would be connected to public Internet	[ ]
Would support home workers	[ ]
Would support mobile workers	[ ]
Would allow access to / from other organisations	[ ]

C7. How strongly is your Intranet consideration and decision being influenced by the 'Year 2000' issue? *(1=not influenced, 5=strongly influenced)*

1 2 3 4 5

C8. Which of the following Intranet services would you be likely to use and have you identified any likely providers of those services? *(Tick all that apply)*

	Which provider?
Business strategy / benefits consultancy	[ ]

_____

Network / infrastructure consultancy   [ ]

Network / infrastructure implementation   [ ]

Application consultancy   [ ]

Application implementation   [ ]

Intranet Web site design / creation   [ ]

Integration of Intranet with existing systems   [ ]

Security consultancy / implementation   [ ]

Education and training   [ ]

C9. How important would the following services be in your Intranet development? *(1=not important, 5=very important)*

Business strategy / benefits consultancy	1 2 3 4 5 N/A
Network / infrastructure consultancy	1 2 3 4 5 N/A
Network / infrastructure implementation	1 2 3 4 5 N/A
Application consultancy	1 2 3 4 5 N/A
Application implementation	1 2 3 4 5 N/A
Intranet Web site design / creation	1 2 3 4 5 N/A
Integration of Intranet with existing systems	1 2 3 4 5 N/A
Security consultancy / implementation	1 2 3 4 5 N/A
Education and training	1 2 3 4 5 N/A

C10. Would you intend to outsource your Intranet operation? *(Tick only one)*

Yes   [ ]
No   [ ]

C11. Please list any Intranet-related services you would require but have not found on offer

_____

_____

_____

_____

_____

C12. Would you prefer to use: *(Tick only one)*

A 'one-stop-shop' Intranet implementation service   [ ]
A mix of suppliers' services at your discretion   [ ]

C13. What are the most likely reasons for not implementing an Intranet, were the decision not to implement to be made? *(Tick all that apply)*

Insufficient funds   [ ]
Not enough benefit   [ ]
In-house skills shortage   [ ]
Lack of awareness   [ ]
Lack of suitable technology / products   [ ]
Lack of suitable external services   [ ]
Security risks   [ ]
Unconfident about long-term viability   [ ]
Other *(specify)*   _____   [ ]

_____

C14. Which departments do you think would gain significant benefit from an Intranet in your organisation? *(Tick all that apply)*

Sales   [ ]
Marketing   [ ]
Customer service   [ ]
Engineering / R&D   [ ]
HR / personnel   [ ]
Administration   [ ]
Executive / senior management   [ ]
Finance / accounting   [ ]
Other *(specify)*   [ ]   _____
Other *(specify)*   [ ]   _____
Other *(specify)*   [ ]   _____

C15. Which of the following initiated, and which are playing major roles in your Intranet considerations? *(Tick all that apply)*

	Initiated	Played major role
End users	[ ]	[ ]
Business unit managers	[ ]	[ ]
CEO / Financial Director	[ ]	[ ]
IS department	[ ]	[ ]
Other *(specify)*	[ ]	[ ] _____

C16. How do expect your Intranet budget to be allocated? Might it be set by corporate HQ or by local offices? If you had budgetary control, how would you allocate it? Who is likely to provide the budget (end users, business unit managers, CEO/FD, IS department etc)? Would budget decisions be made in the UK or outside? Etc.

_____

_____

_____

_____

C17. What obstacles to building your Intranet do you perceive? Please briefly describe them *(very short answers are OK)*

		Description
Funding issues	[ ]	_____
Lack of commitment / loss of vision	[ ]	_____
In-house skills shortage	[ ]	_____
Integrating with existing systems	[ ]	_____
Prioritisation issues	[ ]	_____
Lack of suitable technology / products	[ ]	_____
Lack of suitable external services	[ ]	_____
Security issues	[ ]	_____
Other *(specify)* _____	[ ]	_____

C18. How tightly would you expect to integrate your existing systems with your Intranet? *(1=not integrated at all, 5=totally integrated)*

1 2 3 4 5

C19. If 3, 4, or 5, please describe briefly how you would achieve this integration (tools used, services employed, etc.)

_____

_____

_____

_____

(Blank)

D

Survey Questionnaire—Intranet Rejectors

D1. Have you considered an Intranet?

Yes [ ]
No [ ]

If No, why not?

_____

_____

Then terminate interview

D2. Why have you decided not to implement an Intranet? *(Tick all that apply)*

Insufficient funds   [ ]
Not enough benefit   [ ]
Lack of awareness   [ ]
Lack of external Intranet services   [ ]
Poor quality of external Intranet services [ ]
Security risks   [ ]
Immature technology   [ ]
Unconfident about long-term viability   [ ]
Other *(specify)*   _____ [ ]

_____

D3. If you have found external Intranet services lacking, how do you feel they could be improved?

_____

_____

_____

_____

_____

D4. Please describe the circumstances under which you would reconsider implementing an Intranet

_____

_____

_____

_____

_____

(Blank)

(Blank)