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STRATEGIC MARKET PERSPECTIVE

Microsoft Windows Support Issues — Europe 1995

Software Product Support Programme — Europe

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Microsoft Windows Support Issues, Europe 1995

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Abstract

This report summarises users' current issues and their attitudes about support of the Microsoft Windows™ family of operating system products.

It examines the source and cost of users' current support arrangements, and assesses levels of satisfaction with those arrangements.

The report reviews users' plans for the future, looking at timescales for installing Windows 95, and users' intentions regarding changing their support arrangements.

The report contains estimates of the size of the Windows support market, and offers advice to vendors who wish to take a share of that market.

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Berkshire, SL1 1DZ, U.K.

Published by
INPUT
1881 Landings Drive
Mountain View, CA 94043-0848
United States of America

Software Product Support Programme—Europe

Microsoft Windows Support Issues, Europe 1995

MSMR • 619 • 1995

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I

Introduction

This report and related research are a part of INPUT's European Software Product Support programme. The programme provides market research reports, consulting and recommendations to the management of leading suppliers in the information services industry.

A
Scope

This report examines support issues facing major users of Microsoft Windows. A major user is considered for the purposes of this report to be one with at least 200 PCs running some variant of Windows. The main focus of the report is on:

- The extent and cost of support provided from within user organisations
- The extent and cost of support provided by third-parties to user organisations
- User satisfaction with support provided by third-parties
- Users' plans to move to Windows 95
- Users' planned future expenditure on support
- Users' concerns about support, both at present and over the next three years.

B
Purpose

The purpose of the research conducted for this report is to help organisations who offer or plan to offer Windows support services to:

- Learn what proportion of users seek Windows support from third parties
- Appreciate what aspects of third-party service are most important to users
- Understand users' expectations of expenditure on Windows support
- Estimate the scope of the Windows 95 support challenge.

C
Definitions

1. Software Product Support

INPUT defines software product support as those continuing activities provided by a vendor that are necessary to make the product work effectively, outside the delivery of the product itself. Exhibit I-1 lists the most common elements of software product support.

Exhibit I-1

Elements of Software Product Support

- Software installation
- Telecommunications provided support
- Software updates
- Remote diagnostics
- Software problems database
- On-site support (sometimes)
- Initial training

Source: INPUT

This formal definition is convenient for the purposes of analysing user and vendor activity, but it should be noted that in some organisations the responsibility for carrying out these activities is shared between a number of departments, and that other organisations may have a single department which carries out not only these but other activities.

2. Windows

This report uses the generic term "Windows" to include:

- Microsoft Windows
- Microsoft Windows for Workgroups
- Microsoft Windows NT *and* Microsoft Windows NT Advanced Server.

D
Methodology

This report used the following sources of information:

- Secondary research from INPUT's corporate library
- Ongoing analysis of European software products markets
- User Research.

During March and April 1995 INPUT interviewed 90 European Windows users. The users were chosen to be representative of all types of organisations using Windows, with the qualification that they must have at least 200 PCs running Windows. Exhibit I-2 gives a summary of the users' major characteristics.

Respondents were all accountable for one or more of the following functions:

- *Delivery* of Windows support
- *Management* of Windows support
- *Purchase* of Windows support.

Exhibit I-2

User Respondent Profiles

Characteristic	Category	Number of users	Proportion of total
Country:	France	30	33%
	Germany	30	33%
	U.K.	30	33%
Number of Windows PCs:	<=500	44	49%
	501-1000	26	29%
	1001-2000	9	10%
	2001-4000	4	4%
	4001-6000	4	4%
	>=6001	3	3%
* Average proportion of PC population running:	Windows	79%	N/A
	Windows for Workgroups	18%	N/A
	Windows NT	5%	N/A
Type of organisation:	Local or National Government	5	6%
	Banking and Insurance	15	17%
	Industrial	63	70%
	Other	7	8%

No. of respondents: 90

Percentages may not add up to 100 because of rounding

* = multiple responses permitted

Source: INPUT

E
Report Content

The remainder of this report is organised into four chapters and two appendices:

- Chapter II, *Executive Overview*, summarises the findings of this study.
- Chapter III, *Current Windows Support Arrangements*, summarises users' present support strategies, both in terms of internal helpdesks and of support provided by third-parties.
- Chapter IV, *Future Plans for Windows Support*, examines users' plans for the future – including Windows 95 – and assesses likely changes in expenditure on Windows support.
- Chapter V, *User Concerns and Issues*, discusses the topics that are of most importance to users when considering Windows support.
- Appendix A contains an estimate of the current size of the Windows support market in Europe.
- Appendix B contains a copy of the questionnaire used to gather information from Windows users.

F
Related INPUT Research

INPUT has published the following reports that address related issues:

- In the *Information Services Market Analysis - USA* programme:
  - Software Product Support Strategies - Trends and Issues.
- In the *Software Product Support - Europe* programme:
  - Software Product Support - European Market Futures, 1994-1999
  - European Software Product Support, New Open Market Opportunities
  - Vendor Software Product Support Strategies, Europe 1995.

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II

Executive Overview

Microsoft holds a dominant position in the PC operating systems marketplace. It is about to launch Windows 95, which will create major sales and support opportunities.

For two reasons, Microsoft is now encouraging third parties to share in the provision of support to users:

- The advent of Windows 95 is likely to create a massive demand for support that Microsoft alone could not easily handle.
- Microsoft prefers to let third parties involve themselves in activities, notably support, which are secondary to its main activity of product development.

Vendors may well see major opportunities in this new *open* market for Windows support, particularly in view of the many applications that run under Windows and which themselves require support. The European Windows support market alone is likely to be worth $100 million in 1996, and INPUT estimates that the Windows applications support market will be worth over £300 million in 1996.

In order to capture a share of the Windows support market, vendors must respond to the needs and concerns of users, particularly of those business users who are most likely to spend money on support. This report focuses on users with a significant population (at least 200) of PCs that run Windows.

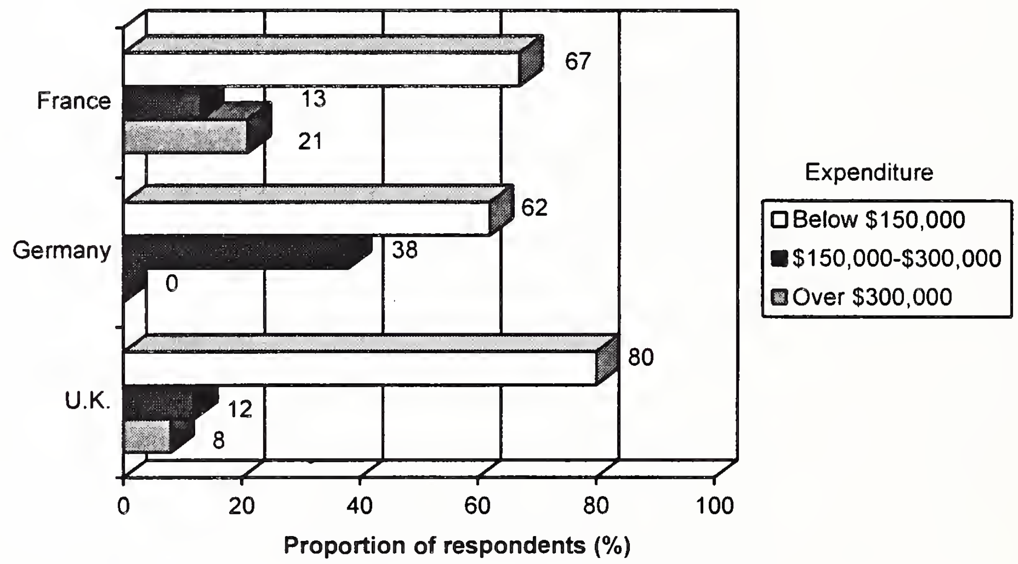
A

Around Half the Users Rely Exclusively on their own Internal Helpdesks for Windows Support

Whilst nearly 90 per cent of organisations surveyed for this report had an internal helpdesk or equivalent function providing Windows support, only about a half had a support contract with a third party. On average, internal helpdesks devoted one-and-a-half person days per week to supporting Windows. Exhibit II-1 shows users' estimates of the total cost (including people and equipment) of the delivery of this internal support.

Exhibit II-1

Annual Costs of Providing Internal Windows Support



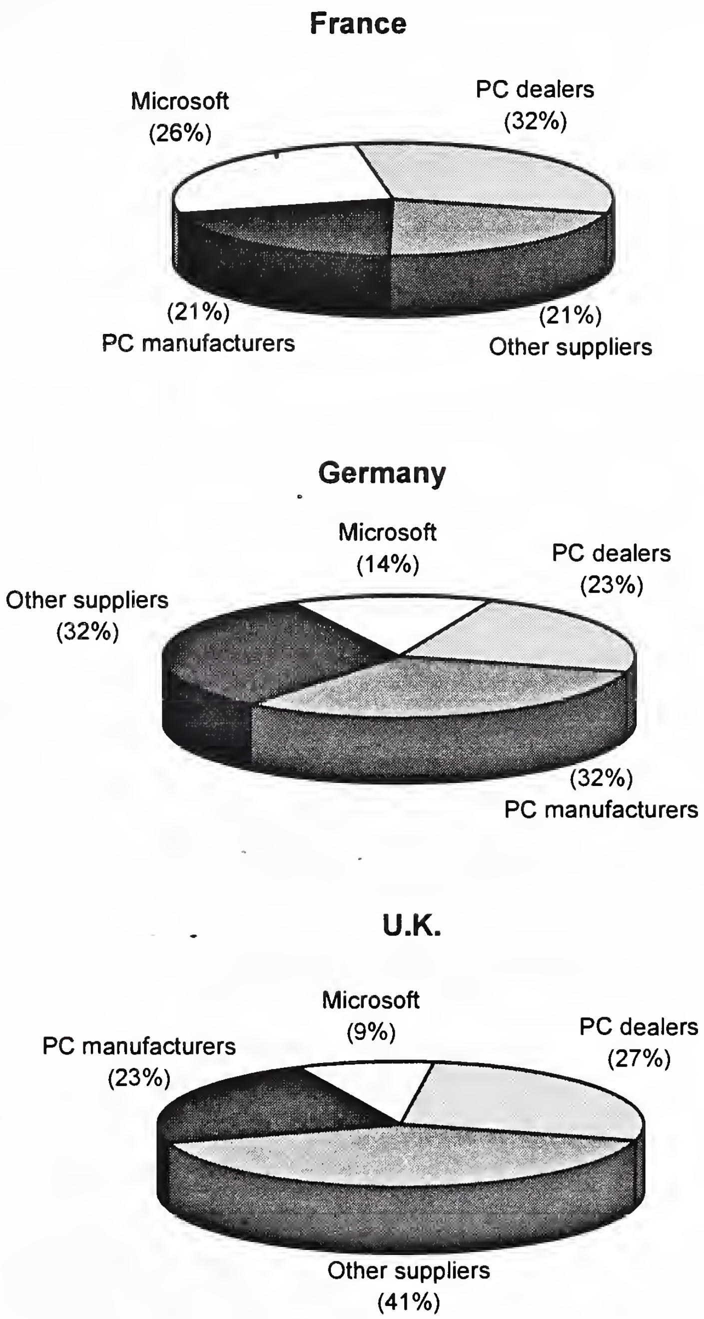
No. of respondents: 75
Because of rounding, percentages may not add up to 100
Source: INPUT

Users gave various reasons for not using third-party support. The most popular (cited by just under half of the respondents 47%) was that they believed their own organisation was self-sufficient. This also implies a positive view of Windows as a product that is both robust and easy to use.

Third-party support came from a variety of sources, as indicated in Exhibits II-2 and II-3.

Exhibit II-2

Sources of Third-party Windows Support: Proportion of Contracts by Type of Supplier



No. of respondents: 43 *Source: INPUT*
Because of rounding, percentages may not add up to 100

Exhibit II-3

Analysis of Number of Third-Party Support Contracts by User

Country	Average number of third-party support contracts per user organisation
France	2.1
Germany	1.4
U.K.	1.6

Source: INPUT

Notable regional differences included:

- Microsoft was four times as popular in France as in the U.K.
- PC dealers were more popular in France than elsewhere
- French users were most likely to have multiple support contracts.

The presence of multiple contracts per user may be an opportunity for potential vendors who can offer a service that meets all user needs from a single source.

Various approaches were used by suppliers to charge for support. A fixed annual fee was the most common approach, but there was a growing use of variable fees based upon usage of support and/or number of PCs. Variable fees are generally a fairer way of charging for support, and vendors should note their acceptability to users.

B

Windows 95 Offers Major Third-party Support Opportunities

Microsoft expects to release Windows 95 in August 1995. Nearly half of all respondents expected to move to Windows 95 within six months of its release. Major new products such as Windows 95 usually create support requirements in their early days because of:

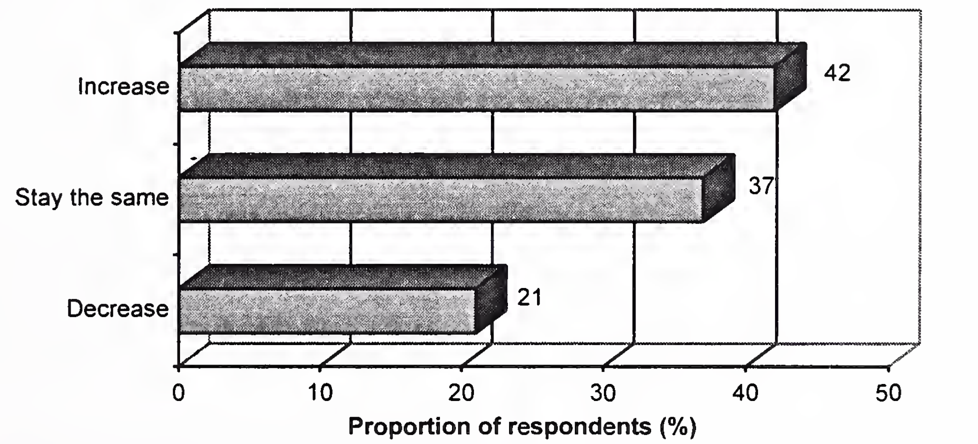
- Software bugs

- User unfamiliarity with new features.

The large installed base of Windows users (estimated by INPUT to be over 60 million worldwide, and over 17 million in Europe) means that vendors can anticipate large demands for support. Users were asked how they expected expenditure on third-party support to have changed in 1996 compared with 1994. Exhibit II-4 summarises what they said.

Exhibit II-4

Expenditure on Third-party Support: 1996 Compared with 1994



No. of respondents: 38 *Source: INPUT*
Because of rounding, percentages may not add up to 100

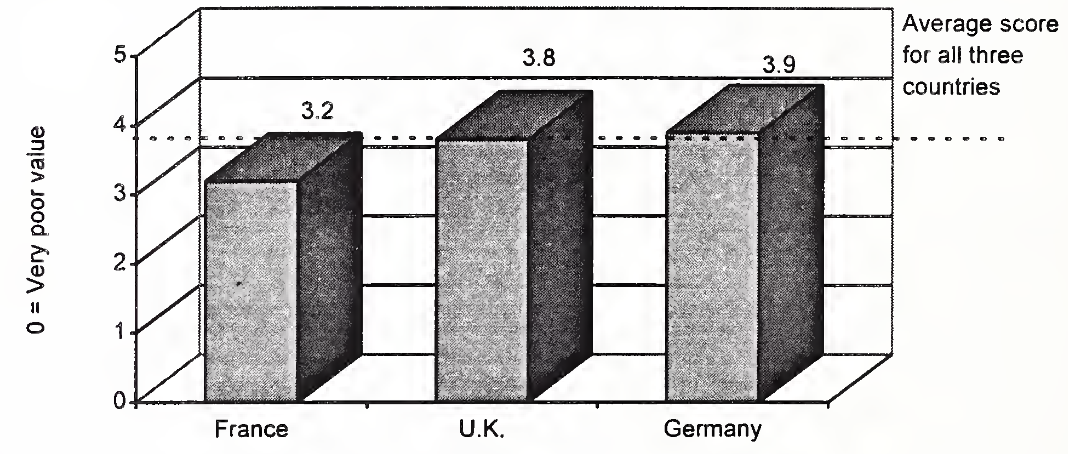
C

Users Happy Now but Concerned about the Future

Users were asked to rate the value-for-money of the Windows support service that they received from their suppliers. Exhibit II-5 summarises their views. Most users are happy with the value for money they are receiving, but in relative terms French users are the least content.

Exhibit II-5

User Ratings of Value-for-Money of Third-party Windows Support



No. of respondents: 37 Standard error: 0.15 *Source: INPUT*

Users also rated various other aspects of the Windows support service that they received from their suppliers. User satisfaction is assessed by INPUT using a satisfaction index, calculated as the difference between *satisfaction* ratings and *importance* ratings, with both ratings being given by users on a scale of 1 to 5.

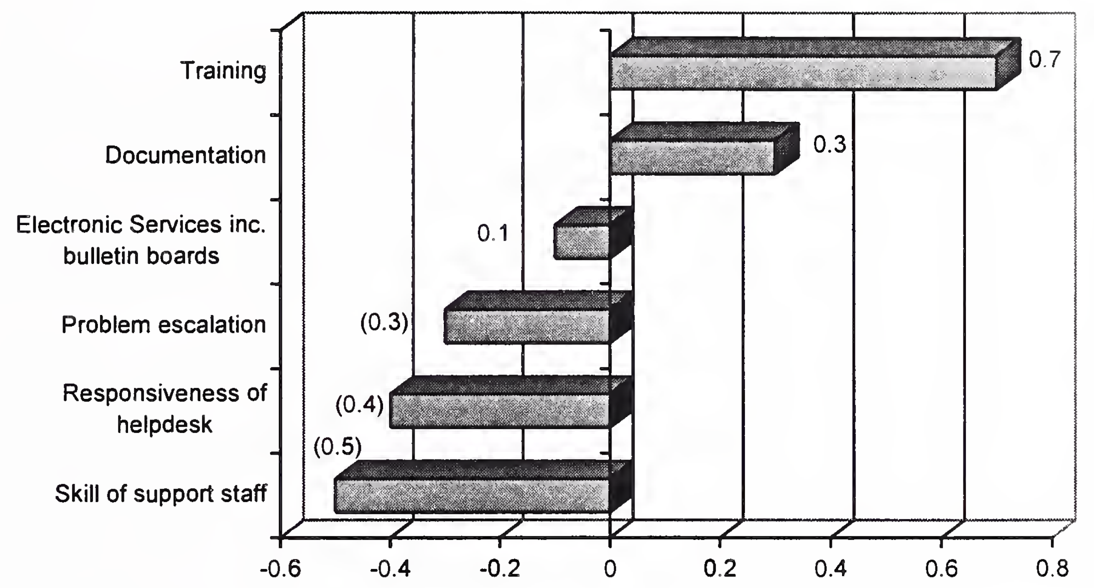
Interpretation of the satisfaction index is as follows:

- 2 = Clearly oversatisfied
- 1 = Oversatisfied
- 0 = Completely satisfied
- (1) = Some concerns
- (2) = Clear evidence of dissatisfaction

Exhibit II-6 shows the user satisfaction ratings.

Exhibit II-6

User Satisfaction with Aspects of Third-party Windows Support



Source: INPUT

Whilst satisfaction levels were generally high, only two areas (documentation and training) attained a positive satisfaction index. This suggests that users are looking for improvements in service in other areas.

For the moment, however, only 27 per cent of respondents said they planned any change in their support arrangements. On a regional level, France had a higher-than-average proportion of users (40 per cent) planning change, whereas Germany (23 per cent) and the U.K. (20 per cent) had lower-than-average proportions.

When users were invited to give their own account of what they liked most and least about third-party support, positive remarks greatly outweighed negative. The following *likes* were mentioned by at least 15 per cent of respondents:

- Local availability (24%)
- Single point of contact (21%)
- Technical expertise of support staff (18%)
- Dealing directly with the company that developed the product (15%)
- Cost-effectiveness of service (15%).

There were no predominant *dislikes*, but the following were mentioned by more than one user:

- Lack of technical expertise
- Lack of local presence
- Suppliers blaming other suppliers for problems rather than looking for solutions
- Service not thought to be cost-effective
- Too many problems referred to higher levels by original source of support before being resolved.

There was a marked difference between user views of the present and the future. Whilst 75 per cent said that they had no concerns about Windows support at present, only 23 per cent did not express some concerns about the next three years. Those who did express some concern raised many issues, including:

- Uncertainty about Microsoft's plans for the future of Windows
- Concern about the quality of Windows 95
- Concern about the increased complexity of Windows, and the effect this might have on support.

D

Support Organisations can Exploit a Major Opportunity if they Respond to User Needs

Responses to INPUT's survey suggest that the Windows user community is currently happy with the support that it gets from its third party suppliers. However, users, particularly in France, have concerns about the future and may be prepared either to supplement their current internal support arrangements or change their third-party support arrangements.

Vendors who wish to become major players in the Windows support market should:

- As far as possible, offer a single source of support for all Windows-related needs
- Work co-operatively with other vendors when problems cannot be solved by their own staff
- Have some local presence within a reasonable distance from users' sites
- Offer equitable and comprehensible support pricing structures
- Employ staff with high levels of expertise, particularly in Windows 95
- Deal responsively with users, and attempt to solve problems promptly
- Provide electronic support services, notably a bulletin board
- Offer effective training courses.

(Blank)

III

Current Windows Support Arrangements

A
Most Organisations have an Internal Support Function

Eighty-six per cent of the 90 organisations surveyed for this report had an internal helpdesk or equivalent function providing some support to the organisation's Windows users. Fourteen per cent of the organisations interviewed (13) did not have an internal helpdesk providing Windows support, for reasons summarised in Exhibit III-1.

Exhibit III-1

Reasons for not having Internal Windows Support Function

Reason	Number of respondents	Proportion of total
Believe external support more cost-effective	7	54%
Low or decreasing usage of Windows	4	31%
Other reasons	5	38%
Number of respondents: 13	Multiple responses permitted	

Source: INPUT

Not all of the organisations with internal helpdesks were able to estimate the amount of time and money spent on Windows support. Exhibits III-2 and III-3 summarise the information that respondents did provide.

Exhibit III-2

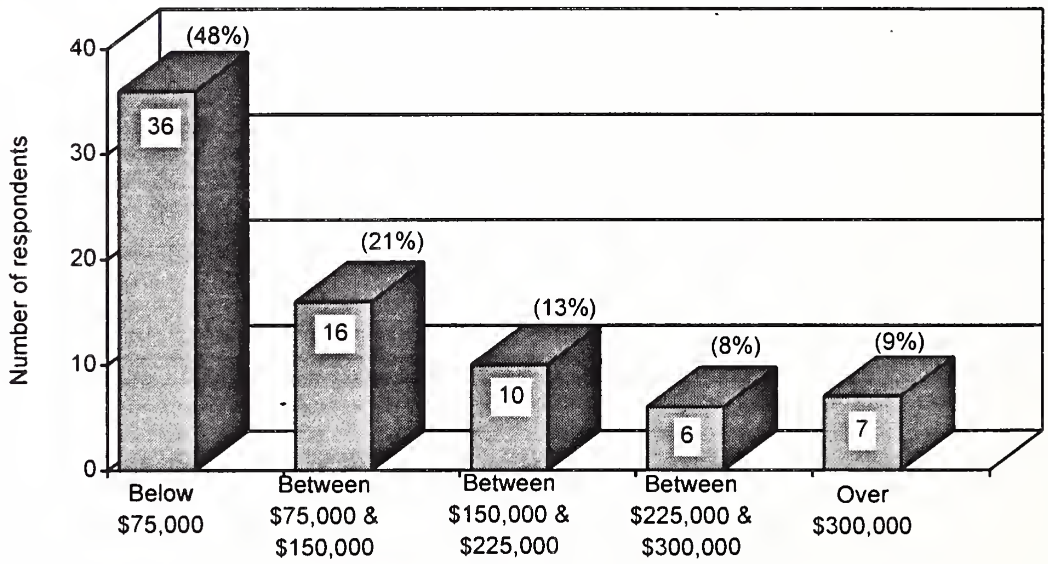
Analysis of Time Spent on Internal Windows Support

Person Hours Devoted to Internal Windows Support per Week	
Minimum	2
Maximum	250
Average	57
Number of respondents: 40	

Source: INPUT

Exhibit III-3

Analysis of 1994 Expenditure on Internal Windows Support



No. of respondents: 75
Because of rounding, percentages may not add up to 100

Source: INPUT

Generally, responses were similar across countries, with one exception: in France, 21 per cent of respondents were spending over $300,000 per year, compared with 8 per cent in Germany and none in the U.K.

B

Around Half the Organisations use Third-party Support

Forty-eight per cent of the 90 organisations surveyed currently use third-party Windows support as well as or instead of internally provided support. Fifty-two per cent of organisations did not use third-party support, for reasons summarised in Exhibit III-4.

Exhibit III-4

Reasons for not using Third-party Windows Support

Reason	Number of respondents	Proportion of total
Believe organisation is self-sufficient	22	47%
Willing to use third parties if need arises, but see no need at present	6	13%
Constrained by company policy	3	6%
Use "free" services from PC vendors	3	6%
Other reasons	8	17%
Number of respondents: 47	Multiple responses permitted	

Source: INPUT

The organisations which received Windows support from third parties used a number of different sources, as illustrated in Exhibit III-5.

Of the 43 users who used third-party support, 16 used more than one supplier. Where other suppliers were used as well as Microsoft, Microsoft was generally regarded as the principal supplier.

There were different patterns of usage across countries:

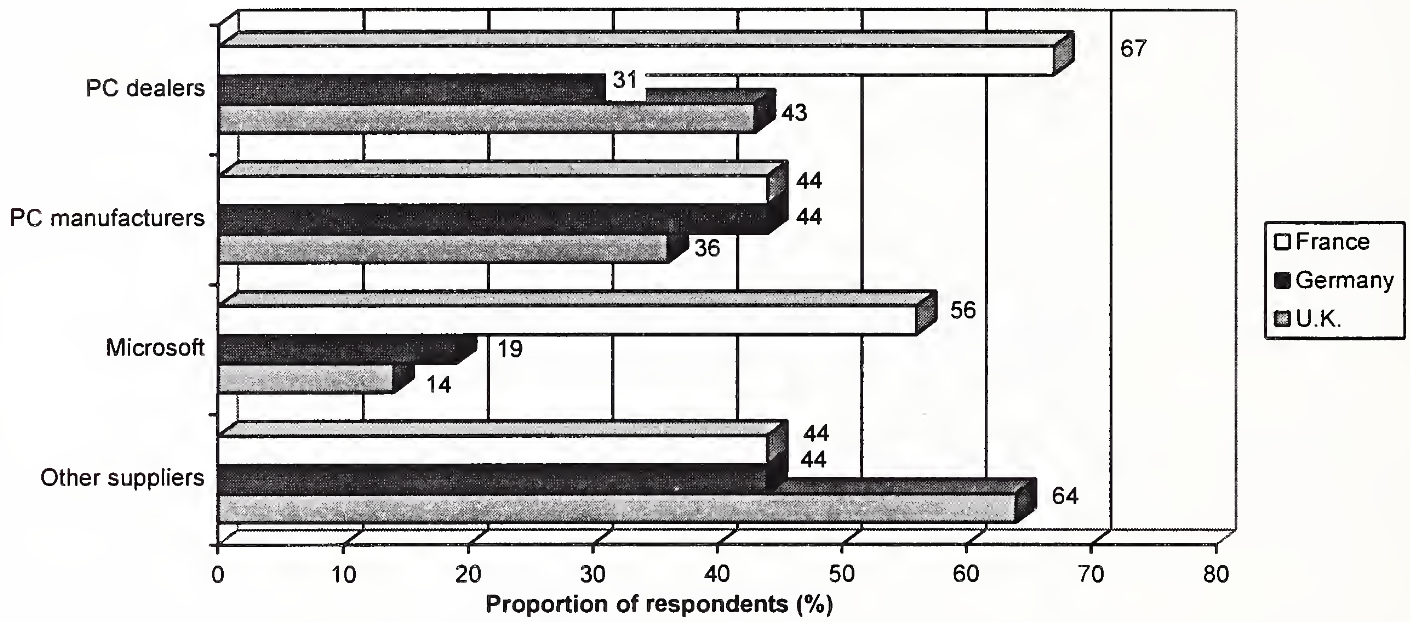
- Microsoft was a more popular choice in France than elsewhere
- PC manufacturers were a more popular choice in Germany than elsewhere.

No one PC dealer predominated – most operated on a purely local basis. Among PC manufacturers, only Digital and Siemens Nixdorf were mentioned by more than one respondent.

A variety of methods was used to charge users for support. Exhibit III-6 summarises the relative prevalence of the methods.

Exhibit III-5

Analysis of Sources of Third-party Windows Support



No. of respondents: 39 Multiple responses permitted. *Source: INPUT*

The most common charging methods were:

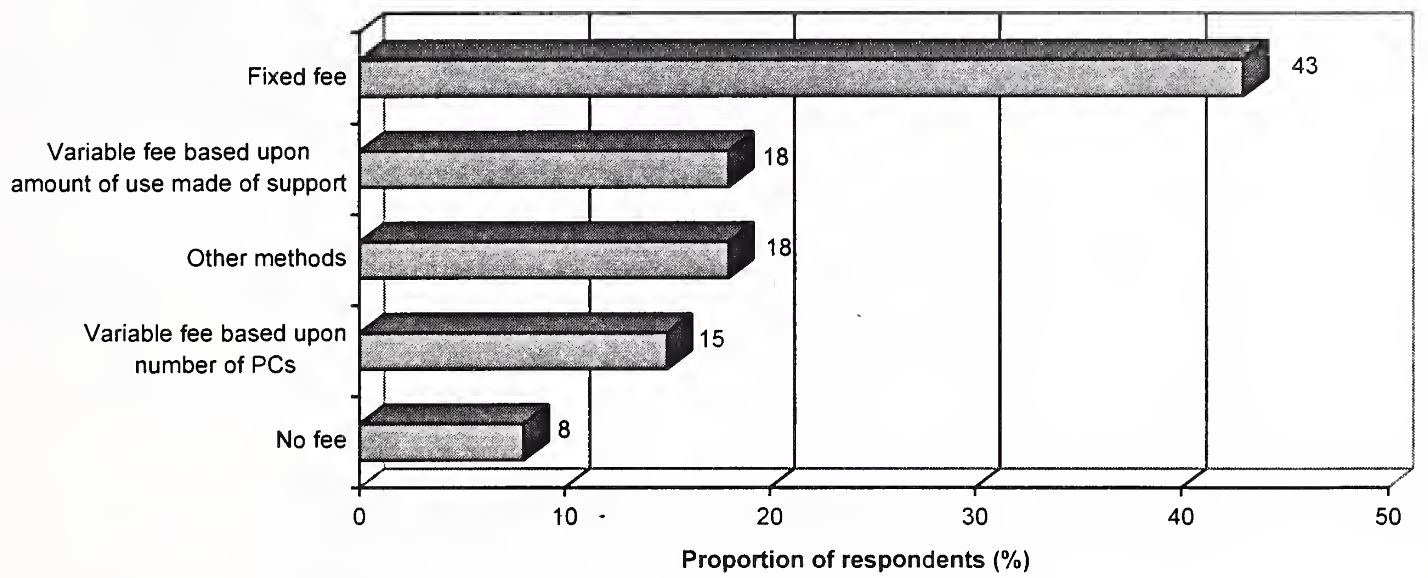
- Fixed fee
- Variable fee based upon usage
- Variable fee based upon number of PCs
- No fee.

Where other methods were mentioned, the most popular was some hybrid of the four main methods. In many cases, a warranty provided free support for a limited period following purchase of the product (or in some cases, following the first support call).

Exhibit III-7 summarises users' estimates of the amount of money spent on third-party Windows support. Current spending patterns varied little from country to country; around half of all users paid less than $30,000 per annum for third-party support.

Exhibit III-6

Analysis of Third-party Charging Methods

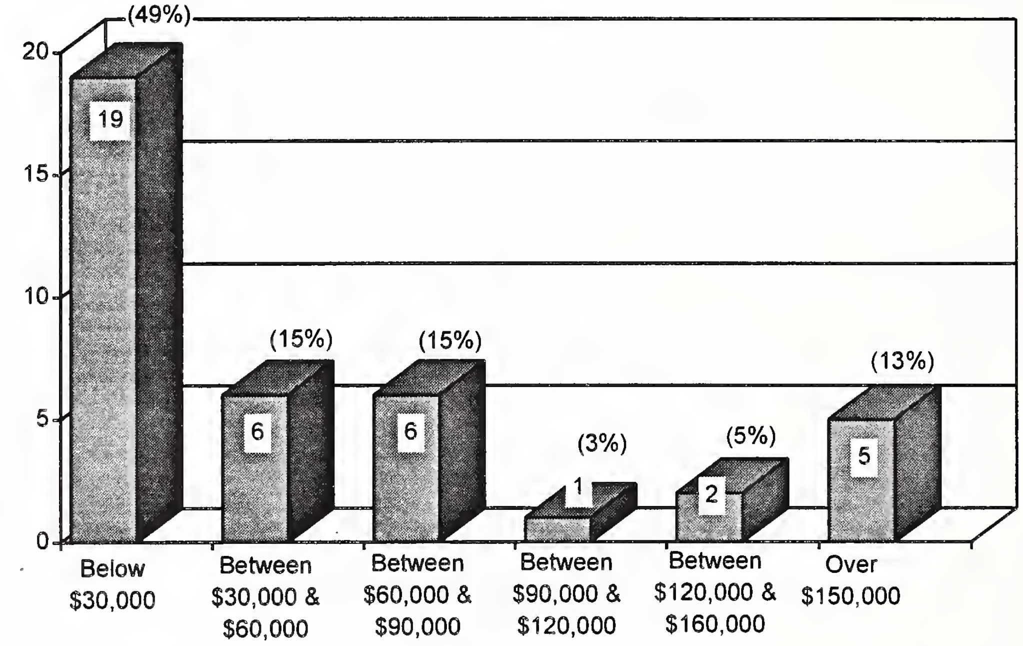


No. of respondents: 40
Because of rounding, percentages may not add up to 100

Source: INPUT

Exhibit III-7

Analysis of 1994 Expenditure on Third-party Windows Support



No. of respondents: 39
Because of rounding, percentages may not add up to 100 *Source: INPUT*

IV

Future Plans for Windows Support

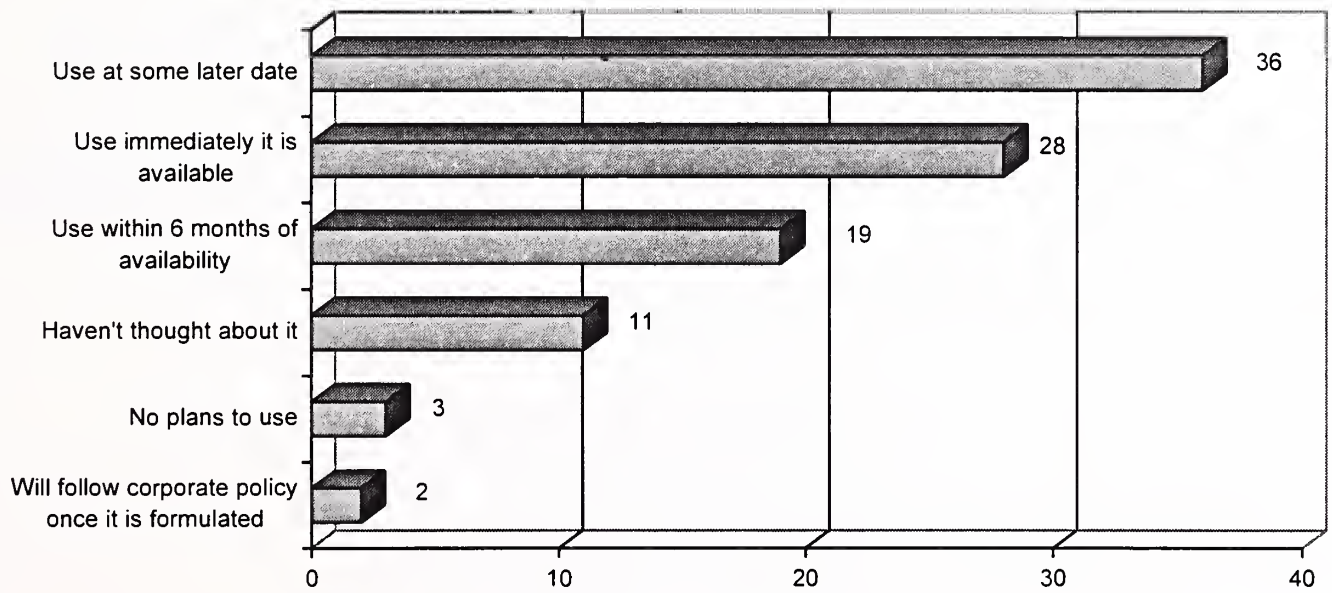
A

Many Users Plan to Install Windows 95 within Six Months of its Release

The most significant short-term issue for Windows users is Windows 95. Exhibit IV-1 summarises users' plans for Windows 95.

Exhibit IV-1

Users' Plans to Use Windows 95



No. of respondents: 90
Because of rounding, percentages may not add up to 100

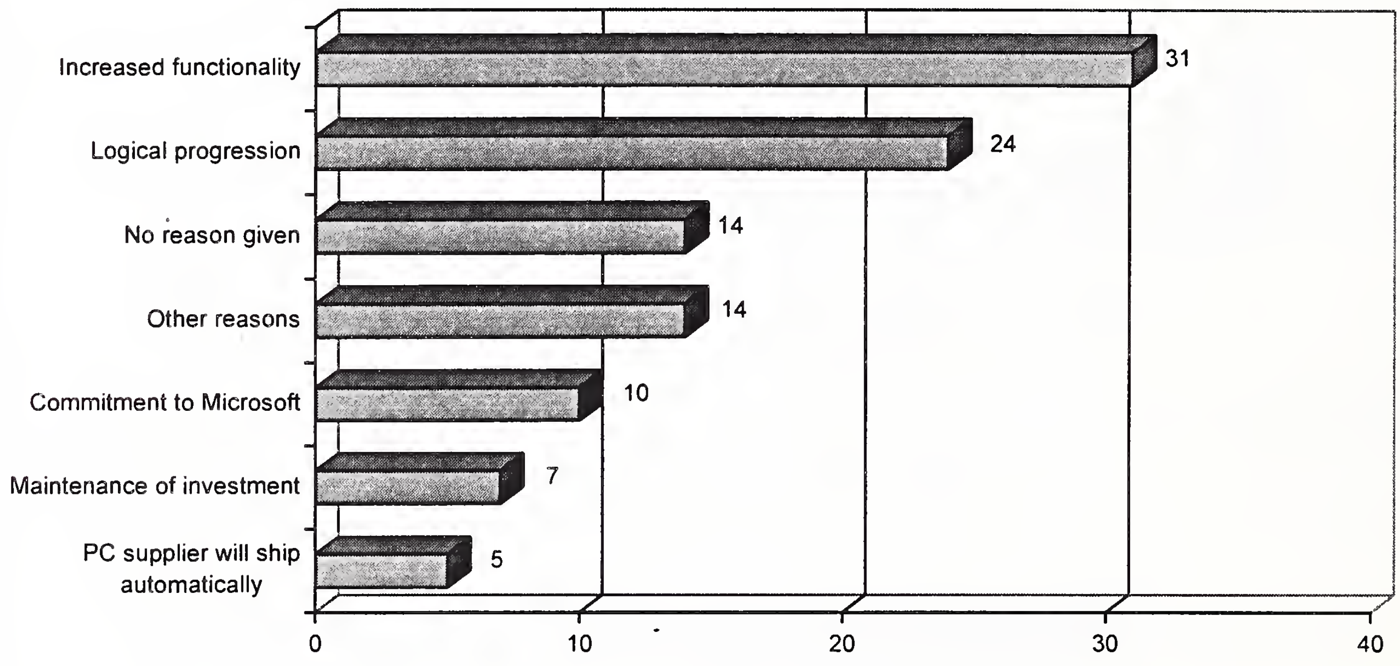
Source: INPUT

Nearly half of all respondents expected to move to Windows 95 within six months of its release. Exhibit IV-2 lists frequently mentioned reasons for moving in that timescale.

Exhibit IV-3 lists explanations given by those who did not plan to install Windows 95 within six months of its release.

Exhibit IV-2

Reasons for Moving Quickly to Windows 95



No. of respondents: 42 Multiple responses permitted *Source: INPUT*

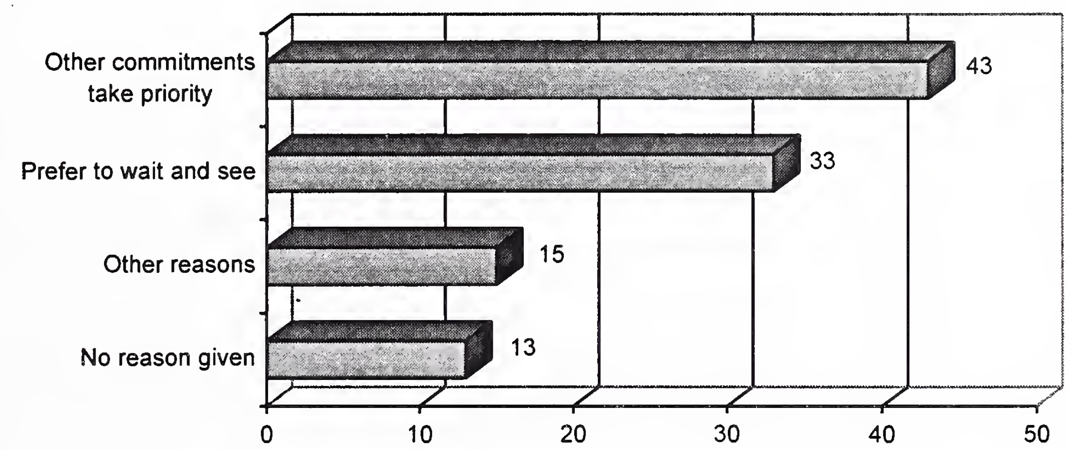
B

Around Two-Thirds of Users Expect Costs to Remain Stable or Increase Slightly

Users were asked how they expected expenditure on internal Windows support to have changed in 1996 by comparison with 1994. Exhibit IV-4 summarises their responses.

Exhibit IV-3

Reasons for Not Moving Quickly to Windows 95



No. of respondents: 46 Multiple responses permitted *Source: INPUT*

Fifty-one per cent of French respondents expected costs to increase, compared with 12 per cent in Germany and 31 per cent in the U.K.

A majority of those who expected costs to increase cited Windows 95 as a major reason. Reasons given by those who expected costs to decrease were fairly evenly split between the following:

- Improved internal administration
- Increasing skill of support staff
- Increased ease of use of Windows
- Decreasing usage of Windows.

Users were also asked how they expected expenditure on third-party Windows support to have changed in 1996 by comparison with 1994. Exhibit IV-5 summarises their responses.

Exhibit IV-4

Expected Changes in Expenditure on Internal Windows Support: Comparison of 1996 with 1994

	France	Germany	U.K.	Total
Increase a lot	21	0	8	8
Increase somewhat	30	12	28	23
Stay the same	22	54	44	41
Decrease somewhat	26	8	28	20
Decrease a lot	0	23	0	8

Percentages rounded *Source: INPUT*

No. of respondents: France 23, Germany 26, U.K. 25.

Only 21 per cent of respondents expected third-party support costs to decrease; they spoke of Windows' stability and of increases in the knowledge and skills of their own staff. Forty-two per cent of respondents expected third-party support costs to increase; many of them expected Windows 95 to have a direct impact on costs.

As was the case with internal costs, there were some regional differences of view. Only 11 per cent of French respondents expected costs to decrease, compared with 38 per cent in Germany and 21 per cent in the U.K.

Exhibit IV-5

Expected Changes in Expenditure on Third-party Windows Support: Comparison of 1996 with 1994

	France	Germany	U.K.	Total
Increase a lot	11	13	0	8
Increase somewhat	44	0	69	34
Stay the same	33	50	23	37
Decrease somewhat	11	25	8	16
Decrease a lot	0	13	0	5

Percentages rounded *Source: INPUT*

No. of respondents: France 9, Germany 16, U.K. 13.

V

User Concerns and Issues

A

Windows Support is Low Priority for Many Organisations

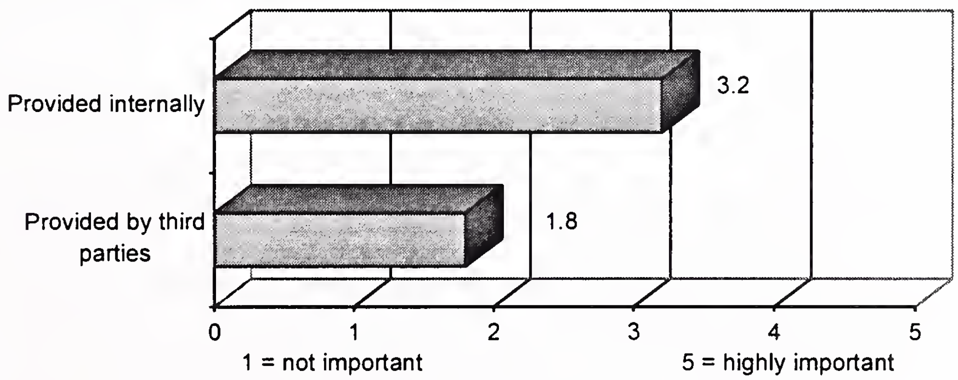
Users were invited to rate the importance of two types of support:

- Provided internally
- Provided by third-parties.

Exhibit V-1 shows their view. In light of the information contained in Chapter 3 that around half of users do not use third-party support, the relative scores are understandable. Even the score for internal support is low enough to suggest that users do not currently regard Windows support as an issue of overriding importance.

Exhibit V-1

Importance of Support to Windows Users



No. of respondents: 90 Standard error: 0.1 *Source: INPUT*

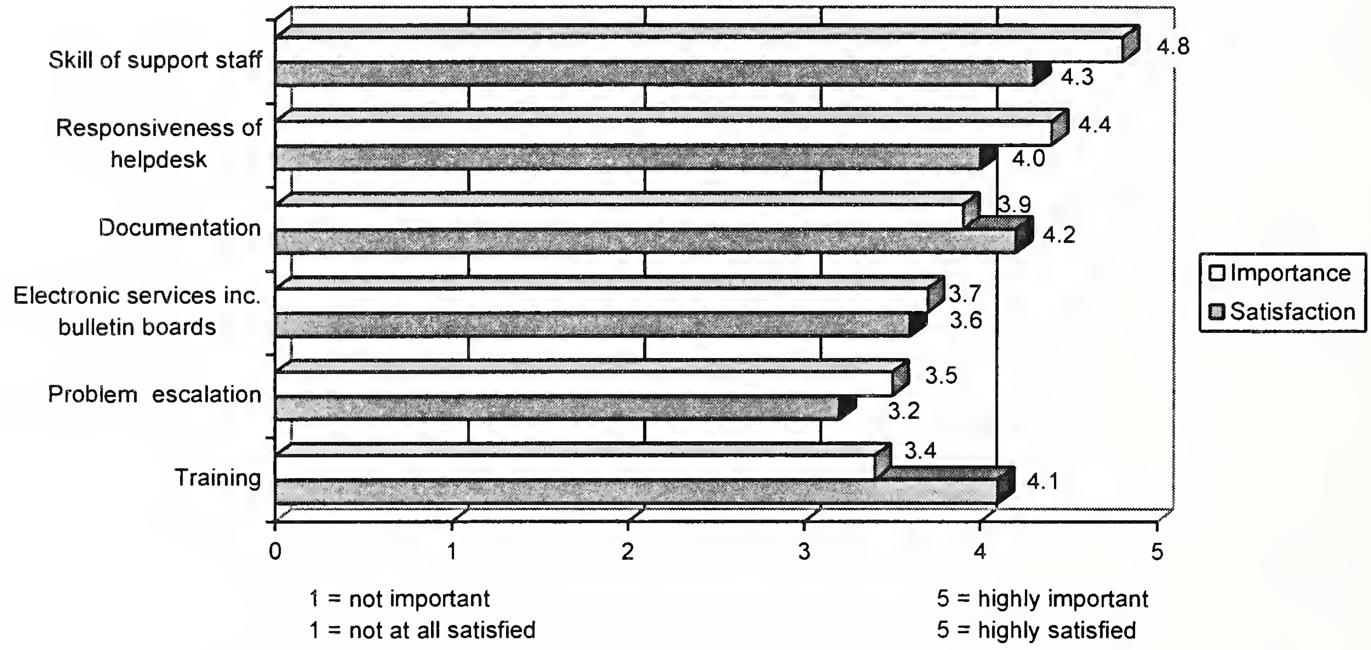
B

Users Generally Satisfied with Support Services

Exhibit V-2 shows how users rated the importance of various aspects of third-party support, and how satisfied they were with each aspect. The *satisfaction* scores were good, but only in the case of documentation and training was the average *satisfaction* score higher than the average *importance* score; this suggests that there is room for improvement in other categories.

Exhibit V-2

User Ratings of Common Support Features



No. of respondents: 35 Standard error: 0.1 *Source: INPUT*

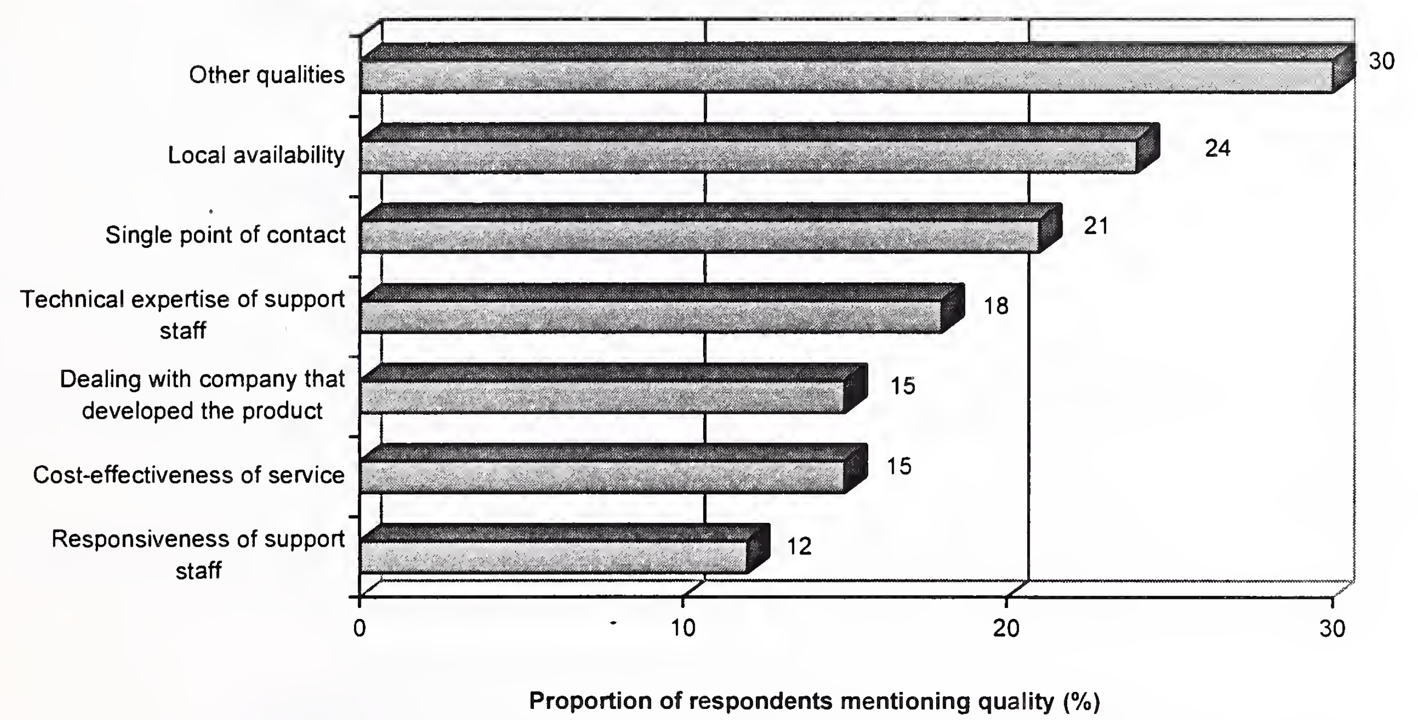
Users were also asked what they liked most and least about their primary source of Windows support. Their comments on their likes are summarised in Exhibit V-3. Only 18 users mentioned dislikes, and only the following issues were cited as dislikes by more than one respondent:

- Lack of technical expertise
- Lack of local presence

- Suppliers blaming other suppliers for problems rather than looking for solutions
- Service not thought to be cost-effective
- Too many problems needing to be referred to higher levels by original source of support before they are resolved.

Exhibit V-3

What Users Like about their Windows Support Suppliers



No. of respondents: 34 Multiple responses permitted *Source: INPUT*

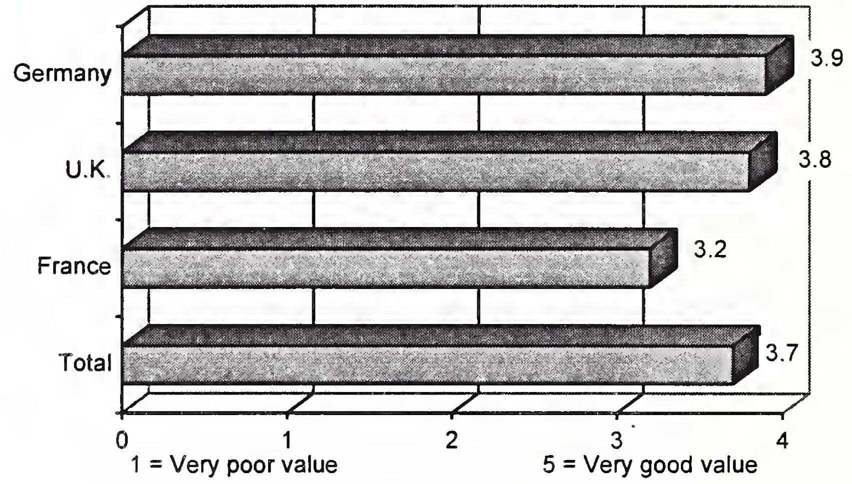
Exhibit V-4 summarises users' rating of the value-for-money provided by their third-party suppliers of Windows support. Ratings were generally high, although French users were less satisfied than their counterparts in Germany and the U.K.

Exhibit V-5 summarises user responses when they were asked if they planned any changes to their support arrangements in the next year. Overall, 27 per cent of users were considering change, more so in France (40 per cent) and less so in Germany (23 per cent) and the U.K. (20 per cent).

Those who were considering change gave a variety of reasons. The only reason that was mentioned by more than two users was the need to enter into more formal support contracts in the light of increasing use of and dependence on Windows.

Exhibit V-4

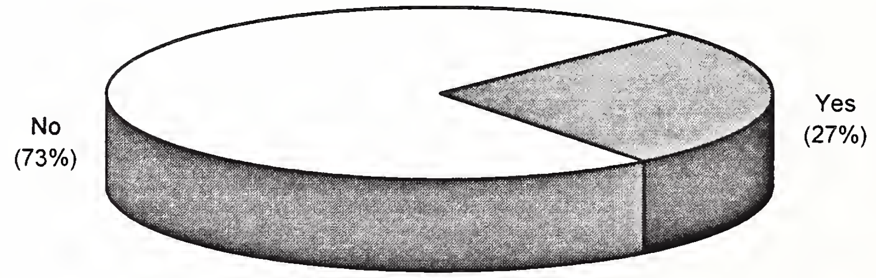
User Ratings of Windows Support Suppliers' Value-for-Money



No. of respondents: 37 Standard error: 0.15 *Source: INPUT*

Exhibit V-5

User Plans to Change their Windows Support Arrangements



Are you considering changing any of your Windows support arrangements in the next year?

No. of respondents: 33 *Source: INPUT*

C

Users have Many Concerns about the Future Support of Windows

Users were invited to comment on their general concerns about Windows support, both now and over the next three years.

Seventy-five per cent of respondents said they had no current concerns; others expressed a variety of current concerns with no predominant theme. Comments included:

- "The true cost of Windows support is a lot higher than most people realise"
- "Plug-and-Play will make things easier"
- "Third-party device connectivity is messy. Release updates are available but not distributed automatically".

A number of respondents were planning to evaluate NT, mentioning this as a plan rather than as a concern.

Looking at the next three years, the percentage of users expressing no concern fell from 75 to 23. Again, there was no predominant theme among the concerns expressed. Comments included:

- "Windows systems are going to become critical applications"
- "Microsoft is becoming more service-oriented and wants revenue from support services"
- "What is the future of Windows after Windows 95? Will there be no support for old releases after a given date?"
- "What will happen to support for Windows if we decide not to implement Windows 95?"
- "Extra functions normally mean extra problems....What started as a relatively straightforward product will require the same support as a mainframe operating system".

Overall, a picture emerges across Europe of a user community which is very happy with things at present, but which is facing the future with a degree of trepidation.

(Blank)

A

Appendix: Windows Support Markets

Exhibit A-1

Windows Support Markets, 1995-1996 ($US million)

Country	1995	1996	Growth 1995-1996
France	10	15	50%
Germany	15	20	33%
U.K.	35	40	14%
Rest of Europe	20	25	25%
Total Europe	80	100	25%

Source: INPUT

(Blank)

B

Appendix: User Questionnaire

A General

INPUT is conducting a survey on support of Microsoft Windows™. Your response to the following questions will provide a foundation for this research.

Your participation is greatly appreciated.

[A.1] Approximately how many PCs running Windows are there in your organisation?

____

(If less than 200, terminate interview)

[A.2] Approximately what percentage of those PCs are running each of the following variants of Windows?

______ % Windows

______ % Windows for Workgroups

______ % Windows NT

[A.3] What is your rating of the importance of Windows support? *(1 = not important, 5 = highly important)*

<u>Importance</u>

Supplied from *within* your organisation ____

Supplied from *outside* your organisation ____

Comments:

____

B
Windows 95

[B.1] What are your plans for using Windows 95? *(Please tick one line)*

____ Will use it immediately after general availability

____ Will use it within six months of general availability

____ Will use it at some later date

____ Haven't thought about it

____ Do not plan to use it

____ Other *(Please specify)* ____________________________

[B.2] What are the major reasons for your decision?

____

C
Internal Support Arrangements

[C.1] Do you have an internal helpdesk or equivalent function within your organisation which provides support to Windows users?

____ Yes

____ No

(If YES, go to Question C.3)

[C.2] Why not?

____

(Now go to Section D)

[C.3] In an average week, approximately how many person hours in total are spent on support of Windows?

____

[C.4] Approximately how much was the total cost in 1994 (including people and equipment) of your internal Windows support function? *(Please tick one line)*

____ Below £50,000

____ Between £50,000 and £100,000

____ Between £100,000 and £150,000

____ Between £150,000 and £200,000

____ Over £200,000

[C.5] How do you think the above cost will have changed by 1996? *(Please tick one line)*

____ Decrease a lot

____ Decrease somewhat

____ Stay the same

____ Increase somewhat

____ Increase a lot

[C.6] What do you see as major reasons for any increases/decreases?

____

D

External Support Arrangements

[D.1] Do you get any support for Windows users from outside suppliers?

____ Yes

____ No

(If YES, go to Question D.3)

[D.2] Why not?

____

(Now go to Section E)

[D.3] Which of the following organisations do you currently use for Windows support? *(Please tick as many lines as are applicable)*

____ Microsoft

____ A PC dealership: which? ____________________

____ A PC manufacturer: which? ____________________

____ Other organisations *(Please specify)*

____

[D.4] If you ticked more than one line when responding to Question D.3, which organisation do you regard as your *main* outside supplier of Windows support?

____

[D.5] Which of the following descriptions best fits your main outside supplier's method of charging you for Windows support? *(Please tick one line)*

____ Support is provided at no charge

____ There is a fixed fee for support

____ There is a variable fee for support based upon number of PCs

____ There is a variable fee for support based upon amount of usage

____ Other arrangements *(please describe)*

____

[D.6] Approximately how much was your total expenditure in 1994 on outside Windows support services? *(Please tick one line)*

____ Below £20,000

____ Between £20,000 and £40,000

____ Between £40,000 and £60,000

____ Between £60,000 and £80,000

____ Between £80,000 and £100,000

____ Over £100,000

[D.7] How do you think the above expenditure will have changed by 1996? *(Please tick one line)*

____ Decrease a lot

____ Decrease somewhat

____ Stay the same

____ Increase somewhat

____ Increase a lot

[D.8] What do you see as major reasons for any increases/decreases in expenditure?

____

[D.9] What do you like best about the support that you receive from your main outside Windows support supplier?

____

[D.10] What do you like least about the support that you receive from your main outside Windows support supplier?

____

[D.11] How do you rate the following Windows support services?

(Under "Importance", *please rate the importance to you of each service on a scale of 1 to 5, where 1 = not at all important and 5 = highly important. Please rate all services, even those that you are not currently receiving).*

(Under "Availability", *please tick if that service is being provided by your main outside Windows support supplier).*

(Under "Satisfaction", *please rate those services that are being provided by your main outside Windows support supplier on a scale of 1 to 5, where 1 = not at all satisfied and 5 = highly satisfied).*

	Importance	Availability	Satisfaction
Initial training	____	____	____
Skill of support staff	____	____	____
Responsiveness of helpdesk	____	____	____
Problem escalation	____	____	____
Documentation	____	____	____
Electronic services (e.g. Remote-diagnostics, bulletin boards)	____	____	____
Other *(please specify)* ____________________	____	____	____

[D.12] How do you rate the value-for-money that you get from your main outside Windows support supplier? *(1 = very poor value, 5 = very good value)*

Value for money (1 to 5): ____

Comments:

____

[D.13] Are you considering changing any of your Windows support arrangements in the next year?

____ Yes

____ No

[D.14] Why?

____

E

Concerns

[E.1] What concerns do you have about Windows support:

Now?

____

Over the next three years?

____

Thank you for your time.

(Blank)