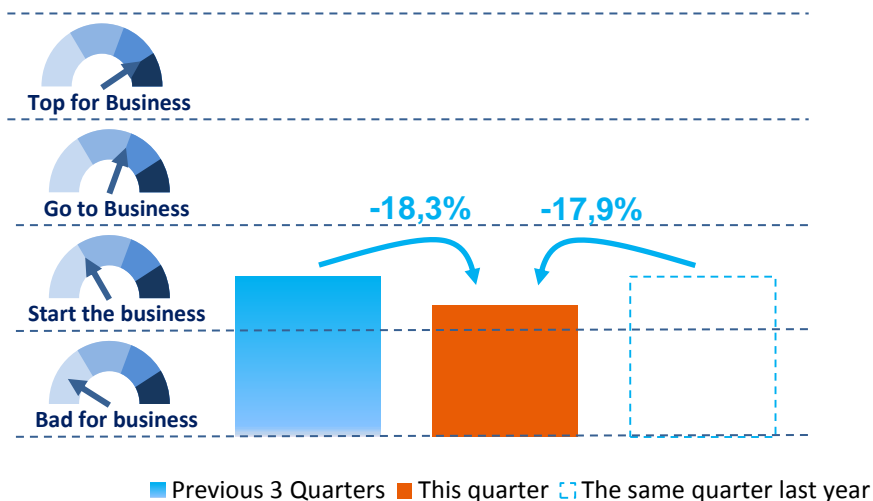


Business Software Barometer

4th Quarter 2012

Global figures

software buying trend



bsoco index

This quarter : 6 533 pts

Previous 3 quarters : 6 267 pts

Same quarter last year : 5 996 pts

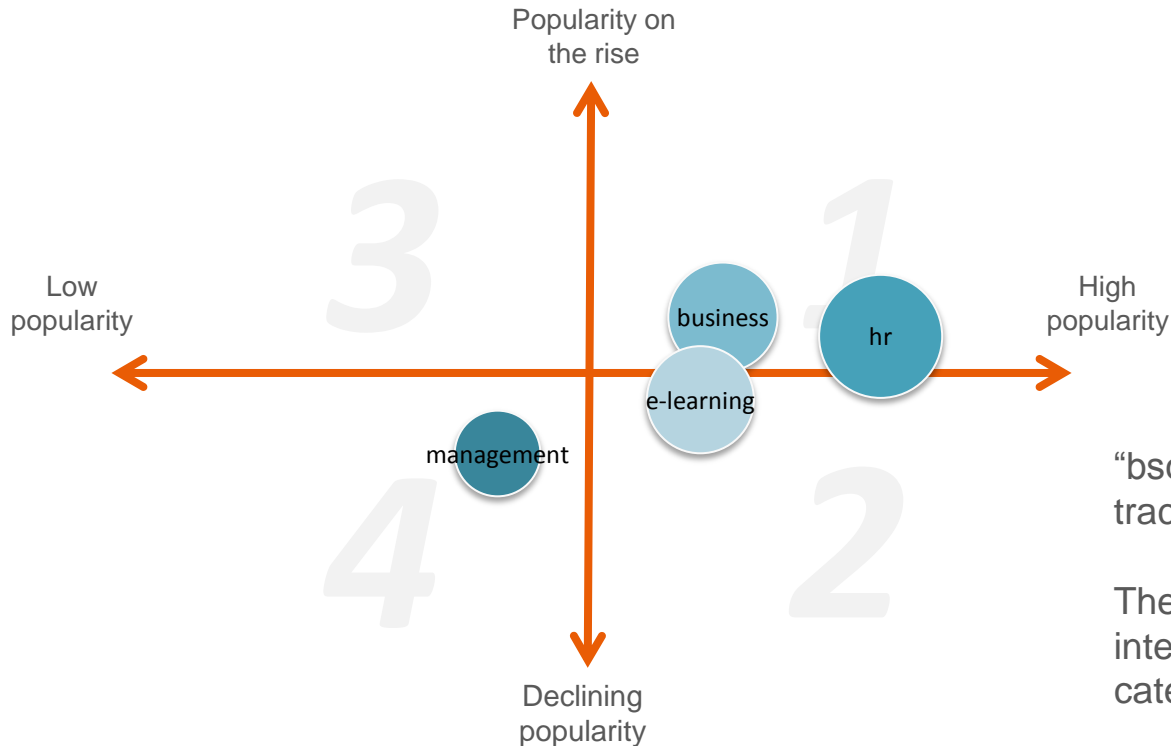


For each software category bsoco determines an average satisfaction index on the market. This represents the overall level of satisfaction of users with business software solutions.

bsoco, the leader of the community benchmark in the domain of professional software, publishes its barometer to present buying trends in **October, November and December**. It shows the general trend in areas of business software based on the web browsing behavior of thousands of bsoco users worldwide. The number of benchmark sheets that have been sold reliably presents short-term purchase intentions.

Number of software in the bsoco database : 502

Dynamic of B2B software market



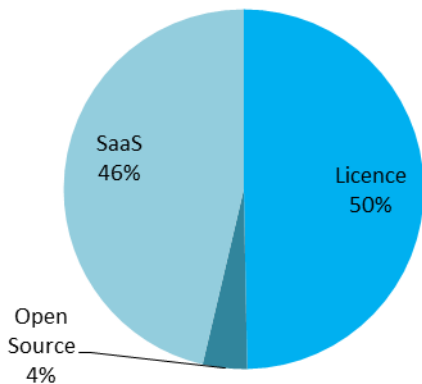
“bsoco analyzes website visitors’ tracking and their votes.

The data allows to deduce visitors’ interest in each business software category.”

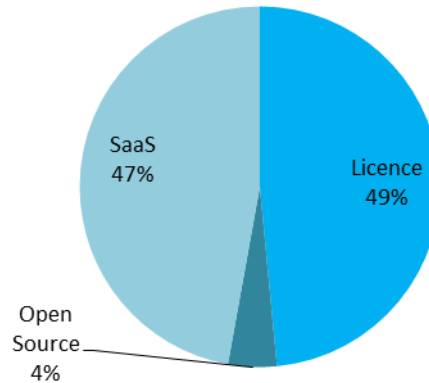
- The horizontal axis represents the popularity: software categories in quadrants 1 and 2 represents more than 25% of visitors’ interest, those in the 3rd and 4th quadrant have less than 25%.
- The vertical axis represents the evolution of the popularity within a period of 6 months: software categories in the quadrants 1 and 3 are increasing (on the rise), those in 4th and 2nd quadrant are decreasing (declining). Furthermore, the size of the point, which represents a category, is proportional to the current popularity of such a category. Note that we must differentiate the popularity of the market and the buying trend (see page 8):
- the buying trend is a short-term indicator (current month);
- the popularity of the market is a long-term indicator (6-12 months) indicating a dynamic of a software category.

Allocation of standalone licence, SaaS and open source

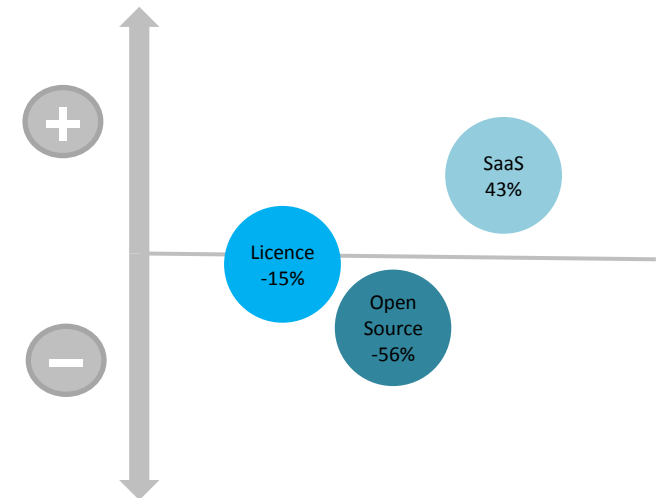
Software registered



Visitors' interest



Evolution of visitors' interest



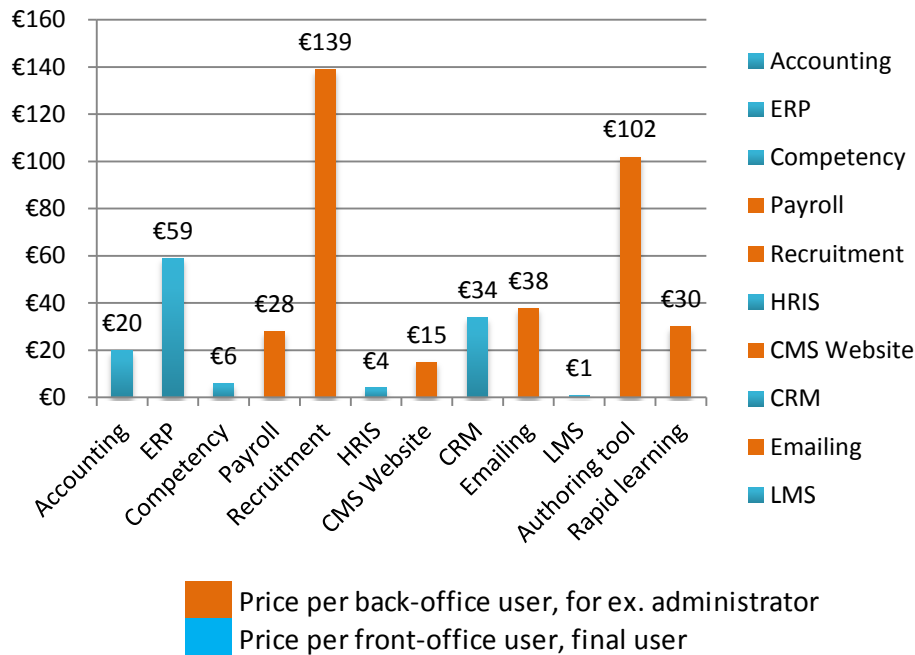
Software packages listed in the bsoco database may have three models:

- Standalone licence
- Open-source
- SaaS

According to those 3 models bsoco extracted the distribution of the market supply.

This data calculation is based on the number of benchmark sheet visits in line with the acquisition model.

Average market price



Evolution of the average market price: +1,25 €

“As publishers indicate prices of their tools via "register software" option on the bsoco web, bsoco calculates an average price per user per month.”

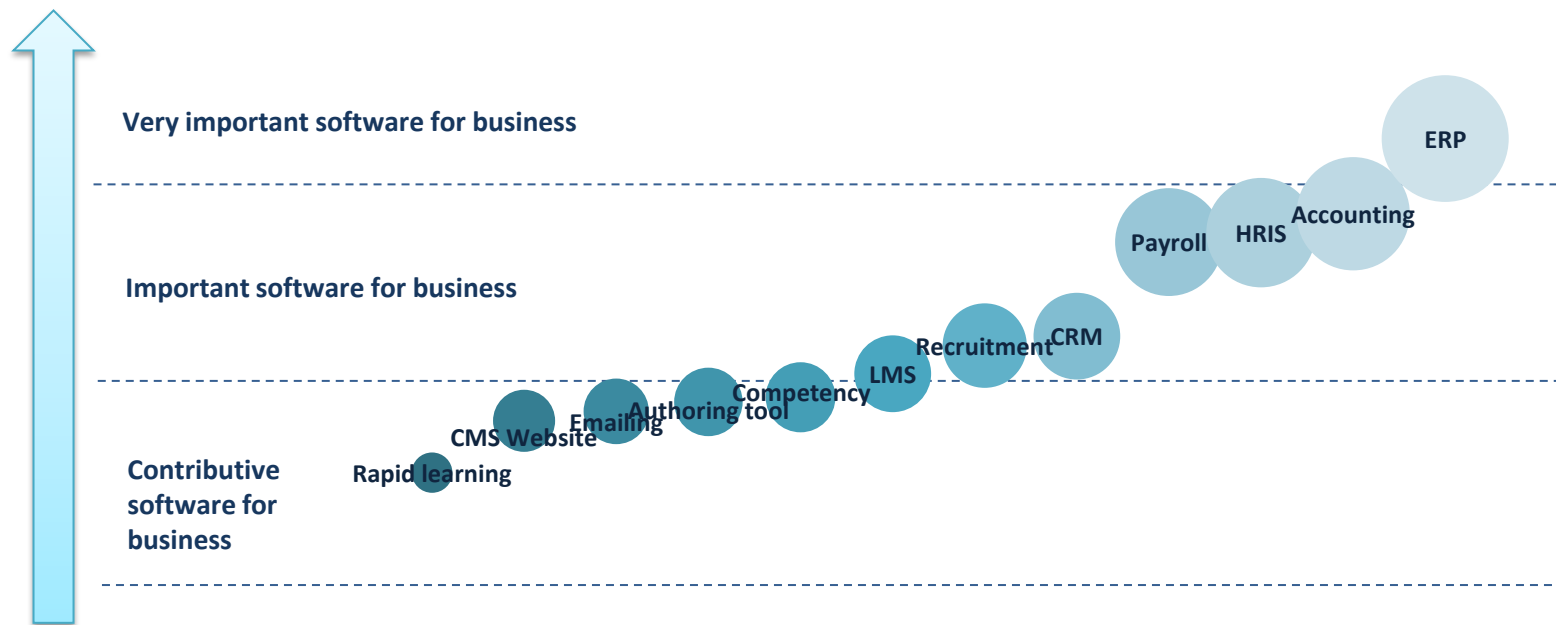
To determine the rate of standalone licence, bsoco retains the depreciation rate calculated within 2.8 years (an average depreciation rate for computer software). The real price is retained for SaaS software.

These analyzes are shown in the diagram above.

There are 2 large groups of tariff:

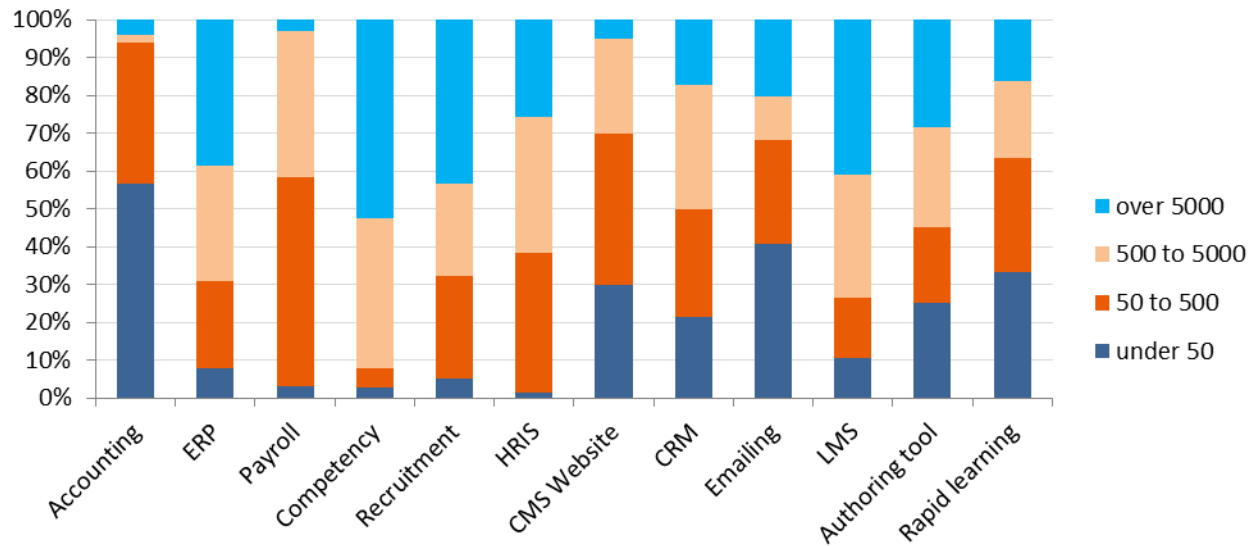
- the price per back-office user: e.g. administrator of a CMS or an emailing software
- the price per front-office user: end (final) user, e.g. student as LMS end user, accountant as accounting software end user

Importance of software for businesses



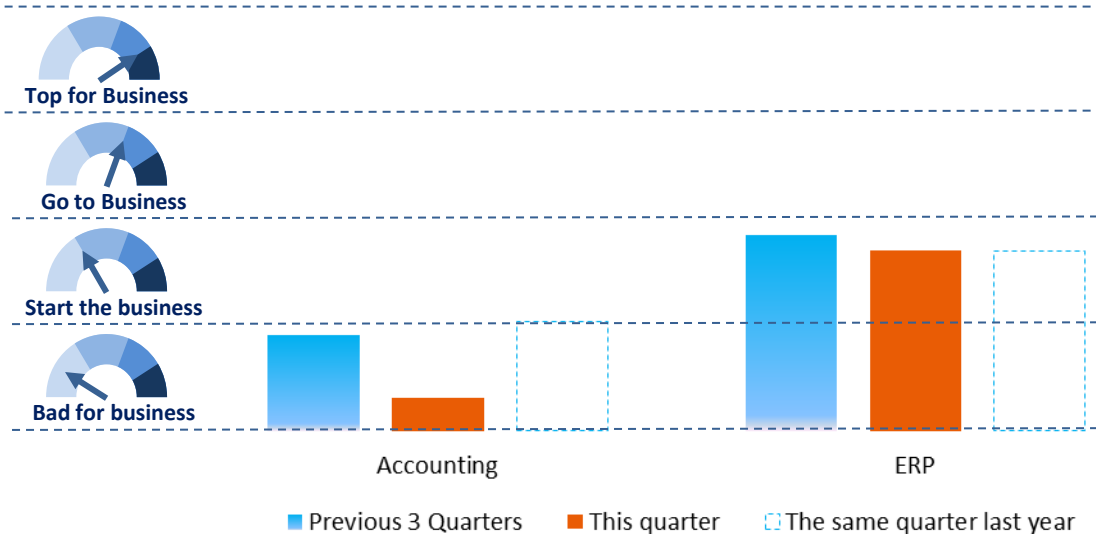
The bsoco questionnaire asks users about the importance of the software for their company. The chart above gives an information about the importance of software packages in line with software users' attitude.

Client company's size



This graphs represent the size of companies for each type of software (the figures are derived from users' votes for software packages).

Management software buying trend



Top 5 countries

Accounting

1. Eastern Europe
2. Spain
3. France
4. North Europe
5. Canada

ERP

1. South-America
2. Switzerland
3. North Africa
4. North Europe
5. Spain

bsoco statistics allow to obtain precise figures on the geographical location of visitors. This classement shows five countries with the biggest buying trend.

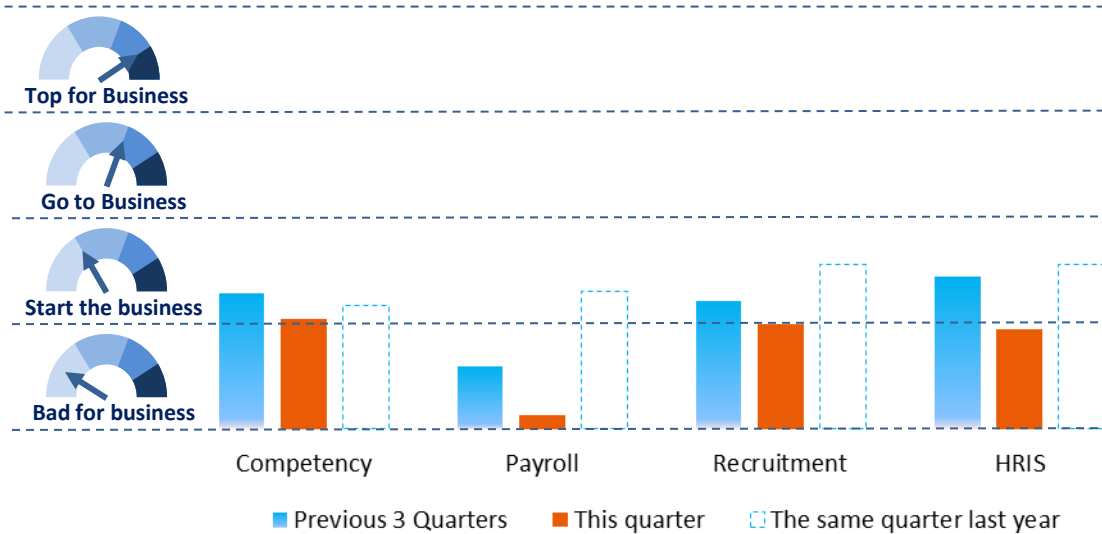
bsoco believes that each user visiting a bsoco benchmark sheet is a potential buyer of the category to which belongs such a software. Buying trends are then calculated from the number of visits of benchmark sheets and indicate the market trend (increasing or decreasing) to professionals, publishers

These analyzes are shown in diagram above.

There are 4 trend levels:

- the lowest one "Bad for business" reflects a market with very low activity;
- the level "Start the business" indicates a weak but existing activity;
- the level "Go to Business" reveals a dynamic commercial market;
- the level "Top for Business" is an exceptional situation highly favorable for sale opportunities.

HR software buying trend



Top 5 countries

Competency

1. North Europe
2. Eastern Europe
3. Switzerland
4. Canada
5. France

Payroll

1. United Kingdom
2. Eastern Europe
3. Switzerland
4. Belgium
5. France

Recruitment

1. Germany
2. Eastern Europe
3. Switzerland
4. Belgium
5. France

HRIS

1. United Kingdom
2. Eastern Europe
3. North Africa
4. Australia
5. France

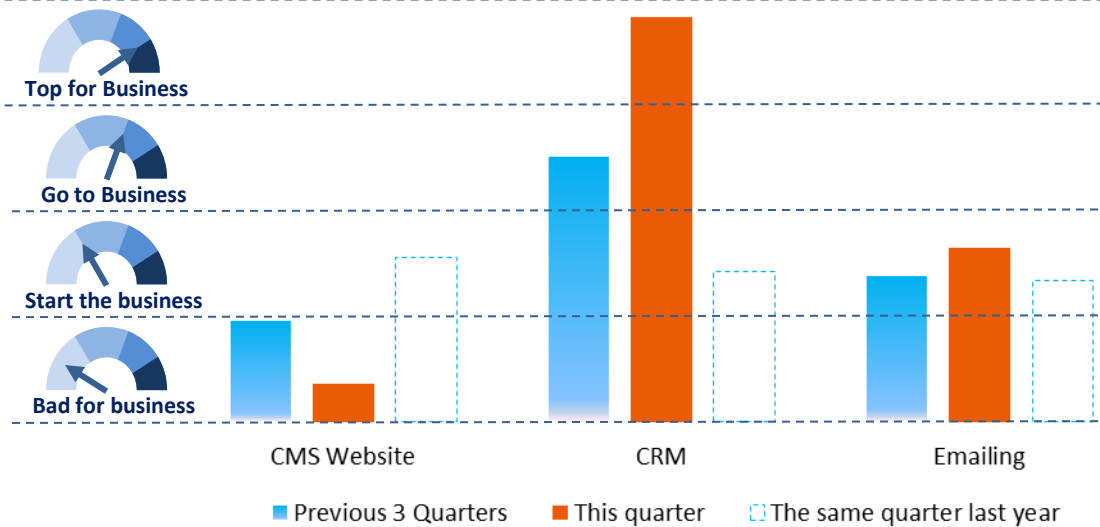
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- the level "Top for Business" is an exceptional situation highly favorable for sale opportunities.

Business software buying trend



Top 5 countries

CMS

1. Canada
2. Eastern Europe
3. United Kingdom
4. Australia
5. France

CRM

1. North Africa
2. Spain
3. South-America
4. Belgium
5. France

Emailing

1. France
2. Eastern Europe
3. Switzerland
4. Canada
5. Germany

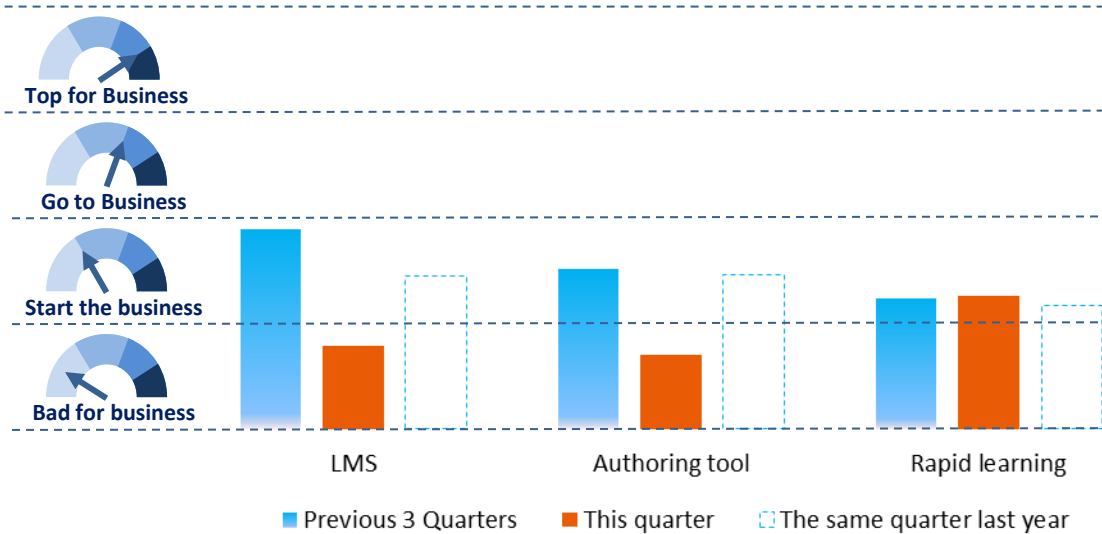
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- the level "Go to Business" reveals a dynamic commercial market;
- the level "Top for Business" is an exceptional situation highly favorable for sale opportunities.

E-learning software buying trend



Top 5 countries

LMS

1. Germany
2. North Europe
3. South Africa
4. United Kingdom
5. Asia

Authoring tool

1. Canada
2. Germany
3. Spain
4. Belgium
5. United Kingdom

Rapid learning

1. Spain
2. Germany
3. Canada
4. Eastern Europe
5. South-America

bsoco believes that each user visiting a bsoco benchmark sheet is a potential buyer of the category to which belongs such a software. Buying trends are then calculated from the number of visits of benchmark sheets and indicate the market trend (increasing or decreasing) to professionals, publishers

These analyzes are shown in diagram above.

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- the level "Start the business" indicates a weak but existing activity;
- the level "Go to Business" reveals a dynamic commercial market;
- the level "Top for Business" is an exceptional situation highly favorable for sale opportunities.

Software classified according to bsoco index – The First 50

1	◆	0	umantis (Competency, 8539 pts)	26	↑	7	webpal (CMS Website, 7739 pts)
2	↑	2	IFS (ERP, 8269 pts)	27		new	Kenexa LMS (LMS, 7721 pts)
3	↑	2	TotalLMS (LMS, 8262 pts)	28	↑	7	Compiere (ERP, 7720 pts)
4	↓	-1	Neolane (Emailing, 8232 pts)	29	↑	8	Netskills (Competency, 7711 pts)
5	↑	12	ContaPyme (Accounting, 8155 pts)	30	↓	-10	Saba Learning Suite (LMS, 7708 pts)
6		new	Lumesse TalentLink (Competency, 8104 pts)	31	↓	-7	CertPoint (LMS, 7696 pts)
7	↑	8	CheetahMail (Emailing, 8071 pts)	32		new	Money S3 (Accounting, 7678 pts)
8	↑	19	HR Smart (Competency, 8010 pts)	33	↑	6	Foederis Compétences (Competency, 7665 pts)
9	↑	2	Epicor Enterprise (ERP, 8006 pts)	34	↑	6	Epicor HCM (HRIS, 7644 pts)
10	↑	8	Infor (ERP, 7997 pts)	35	↓	-9	CVTracker (Recruitment, 7644 pts)
11	↑	8	JNetPublish (CMS Website, 7988 pts)	36	↑	6	Microsoft Dynamics (ERP, 7609 pts)
12	↑	13	Drupal (CMS Website, 7949 pts)	37		new	EBP Comptabilité (Accounting, 7580 pts)
13	↓	-11	Kenexa (Competency, 7944 pts)	38		new	Zureo Contable (Accounting, 7578 pts)
14	↓	-2	Emailvision (Emailing, 7935 pts)	39	↑	4	Sage CRM (CRM, 7561 pts)
15	↓	-5	TalentSoft (Competency, 7929 pts)	40	↑	5	MS Dynamics CRM (CRM, 7556 pts)
16	↓	-7	Sarbacane (Emailing, 7917 pts)	41	↓	-20	Ciel Comptabilité (Accounting, 7552 pts)
17	↓	-4	Cornerstone Learning (LMS, 7895 pts)	42	↑	7	ASA (ERP, 7539 pts)
18	↓	-4	SuccessFactors (Competency, 7873 pts)	43		new	power emailer (Emailing, 7518 pts)
19	↑	12	PeopleStreme (Competency, 7858 pts)	44	↑	3	Dolist (Emailing, 7493 pts)
20	↑	9	Compta One (Accounting, 7827 pts)	45		new	Siebel Oracle on Demand (CRM, 7491 pts)
21	↑	1	Magento (CMS Website, 7799 pts)	46	↓	-5	FILEFINDER (Recruitment, 7486 pts)
22	↓	-6	SalesForce (CRM, 7786 pts)	47		new	elearning maker (Authoring tool, 7477 pts)
23	↑	15	Pohoda (Accounting, 7758 pts)	48	↓	-42	Mamut Enterprise (CRM, 7455 pts)
24		new	Meta4 PeopleNet (HRIS, 7747 pts)	49		new	ADP (Payroll, 7450 pts)
25	↑	5	Cornerstone Performance (Competency, 7741 pts)	50		new	ADP (HRIS, 7450 pts)

bsoco classifies all business software solutions listed in its database according to satisfaction index.

The data are shown on the left side of this page.

The top 50 software packages in all categories:

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