Business Software Barometer

4 Quarter 2015

bsoco
business software comparison

software buying trend

17,76 %

10,90%

Top for Business

Go to Business

Start the business

Bad for business

■ Previous 3 Quarters ■ This quarter ⬚ The same quarter last year
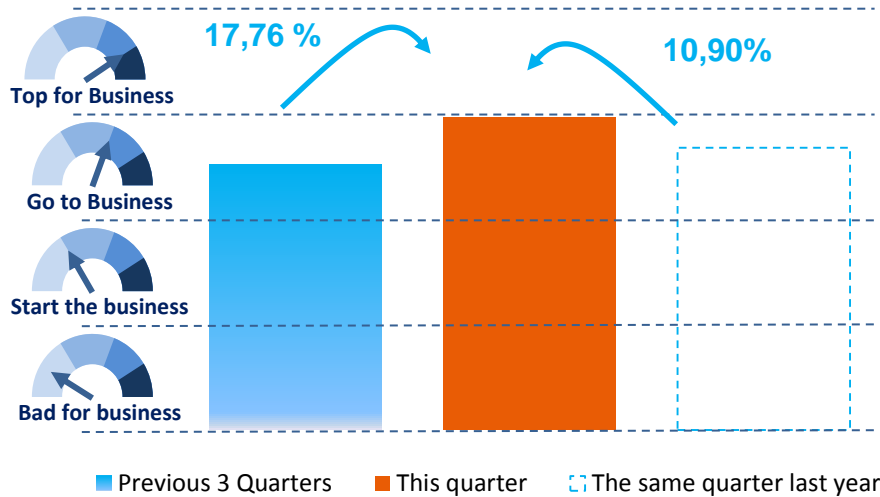
bsoco index

This quarter : 5 139 pts

- 1, 80%

Previous 3 quarters : 5 233 pts

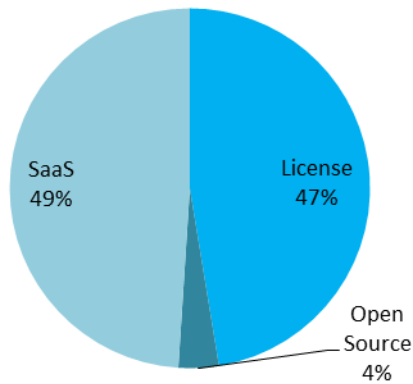Same quarter last year : 5 821 pts

- 11, 72%

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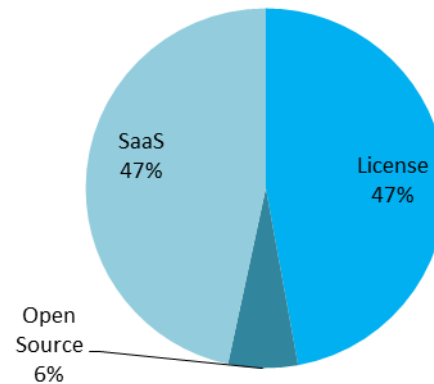
bsoco, the leader of the community benchmark in the domain of professional software, publishes its barometer to present buying trends in **October, November and December.** It shows general trends in areas of business software based on the web browsing behavior of thousands of bsoco users worldwide.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

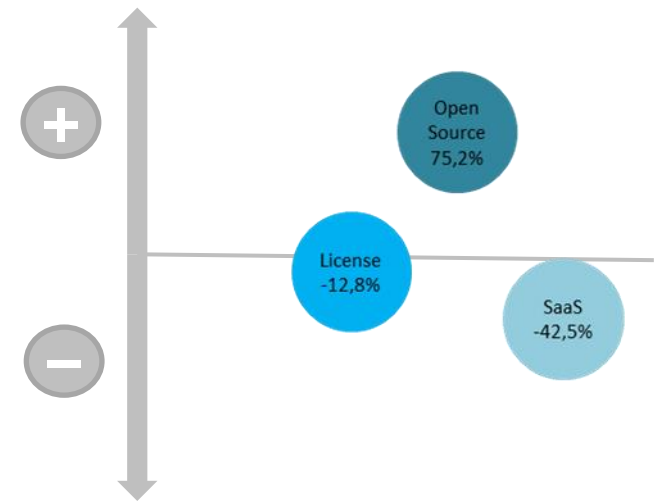## Number of software programs in the bsoco database : 793

Business Software Barometer – Q4 2015

bsoco
business software comparison

Registered software

SaaS 49%
License 47%
Open Source 4%

Visitors´ interest

SaaS 47%
License 47%
Open Source 6%
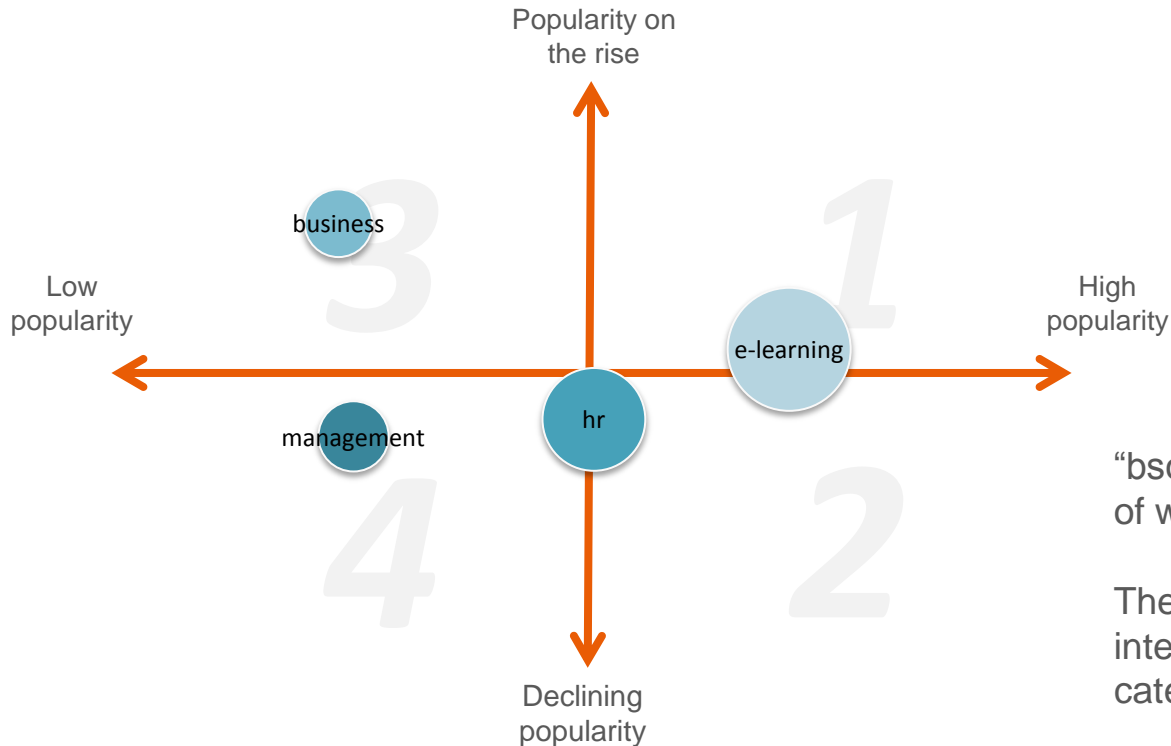
Evolution of visitors´ interest

Open Source 75,2%
License -12,8%
SaaS -42,5%

Software packages listed in the bsoco database are one of three models:
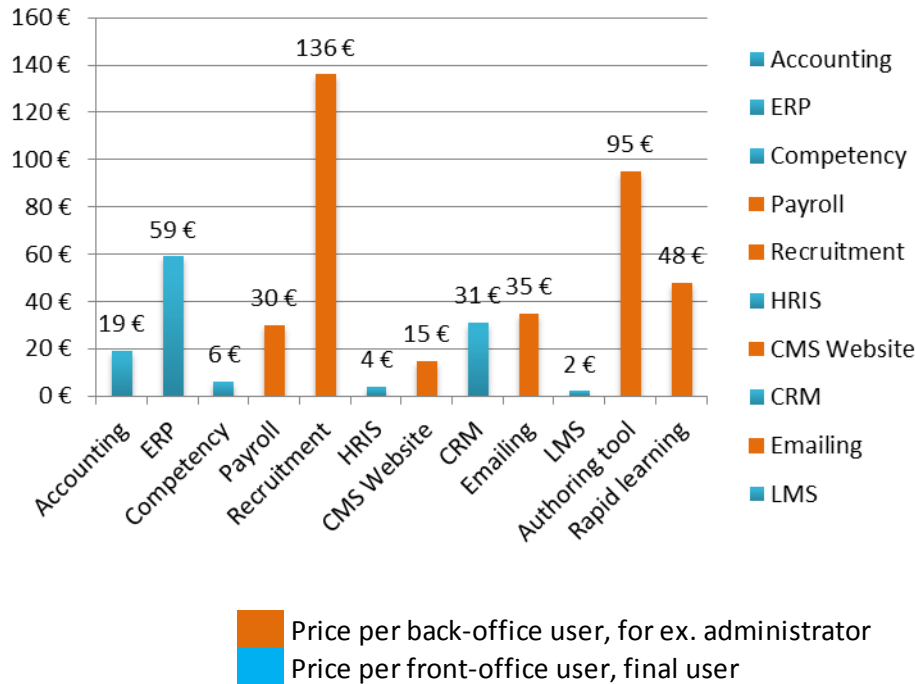
- Standalone license
- Open-source
- SaaS

According to these 3 models, bsoco has extracted the distribution of market supply.
This data calculation is based on the number of benchmark sheet visits in line with the acquisition model.

Business Software Barometer – Q4 2015

bsoco — business software comparison

Popularity on the rise

3

business

Low popularity

High popularity

e-learning

1

hr

management

4

2

"bsoco analyzes the tracking and votes of website visitors.

The data allows us to deduce visitors' interest in each business software category."

Declining popularity

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

bsoco
business software comparison

Legend (chart):
- Accounting
- ERP
- Competency
- Payroll
- Recruitment
- HRIS
- CMS Website
- CRM
- Emailing
- LMS

Chart values: Accounting 19 €, ERP 59 €, Competency 6 €, Payroll 30 €, Recruitment 136 €, HRIS 4 €, CMS Website 15 €, CRM 31 €, Emailing 35 €, LMS 2 €, Authoring tool 95 €, Rapid learning 48 €

■ Price per back-office user, for ex. administrator
■ Price per front-office user, final user

Trends in the average market price: + 1, 05 %

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

To determine the rate for standalone licenses, bsoco uses a depreciation rate of 2.8 years (average depreciation rate for computer software). The real price is retained for SaaS software.

These analyses are shown in the diagram above.

There are 2 large tariff groups:
- 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

Very important software for business

Important software for business

Contributing software for business

ERP

Payroll HRIS Accounting

Recruitment CRM

LMS

Competency

Authoring tool

Emailing
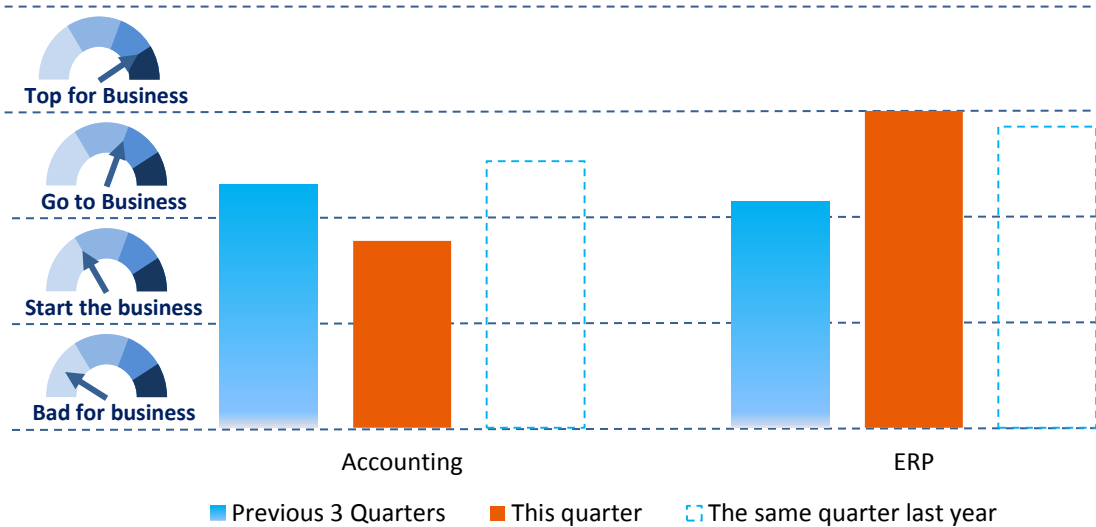
CMS Website

Rapid learning
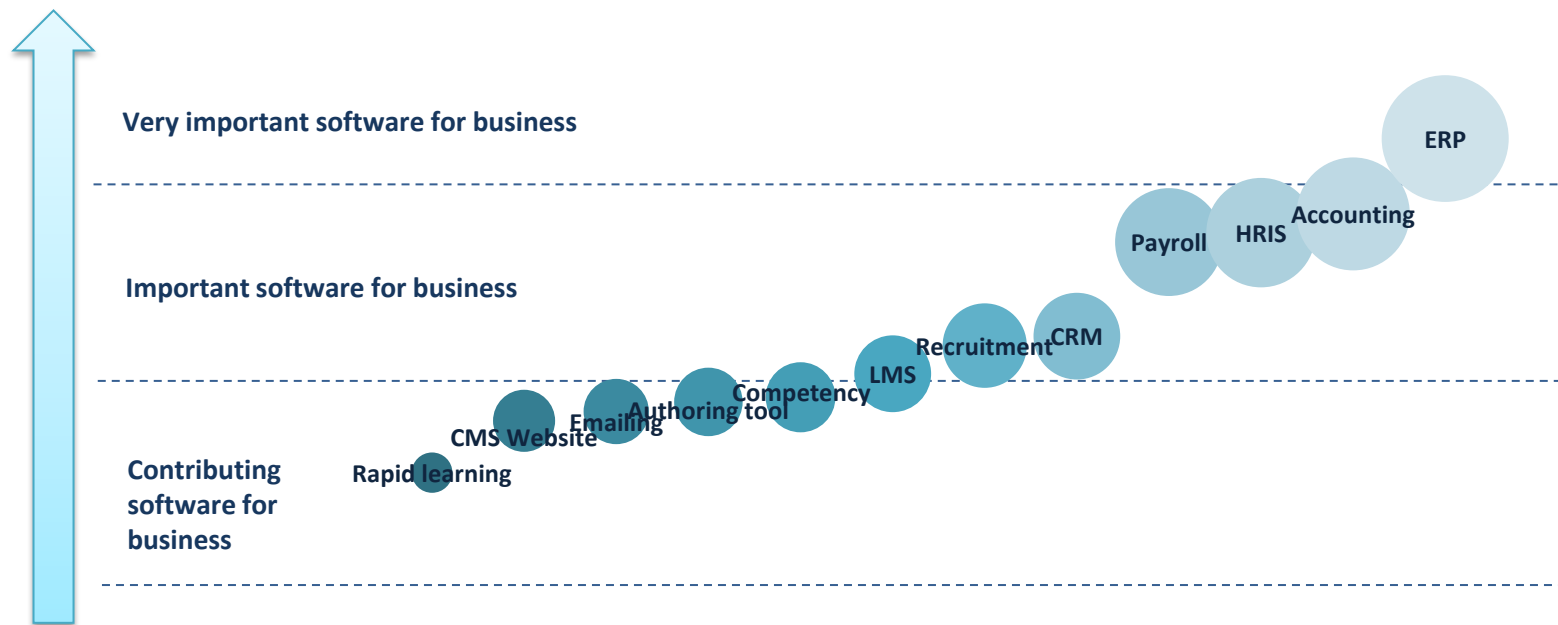
The bsoco questionnaire asks users about the importance of the software for their company. The chart above gives an information about the importance of software packages according to software users.
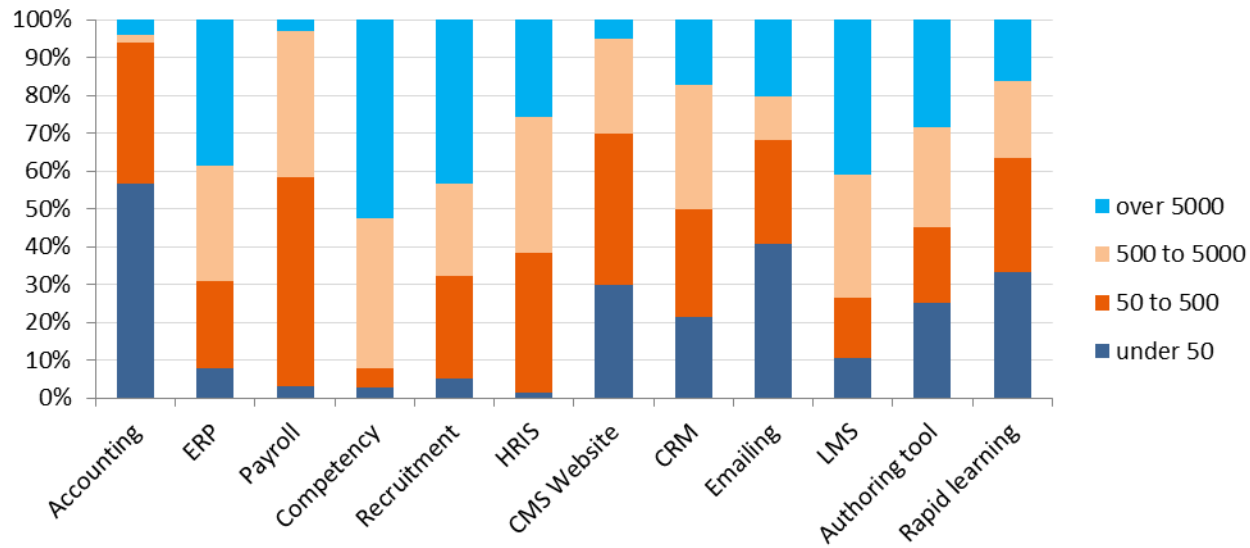
This graph shows the size of companies for each type of software (the figures are derived from users´ votes for software packages).

bsoco
business software comparison

Top 5 countries

Top for Business

Go to Business

Start the business

Bad for business

	Competency	Payroll	Recruitment	HRIS

- Previous 3 Quarters
- This quarter
- The same quarter last year

Competency
1. South-America
2. United States
3. France
4. Spain
5. Canada

Recruitment
1. Asia
2. Canada
3. South-America
4. France
5. Spain

Payroll
1. United Kingdom
2. France
3. Germany
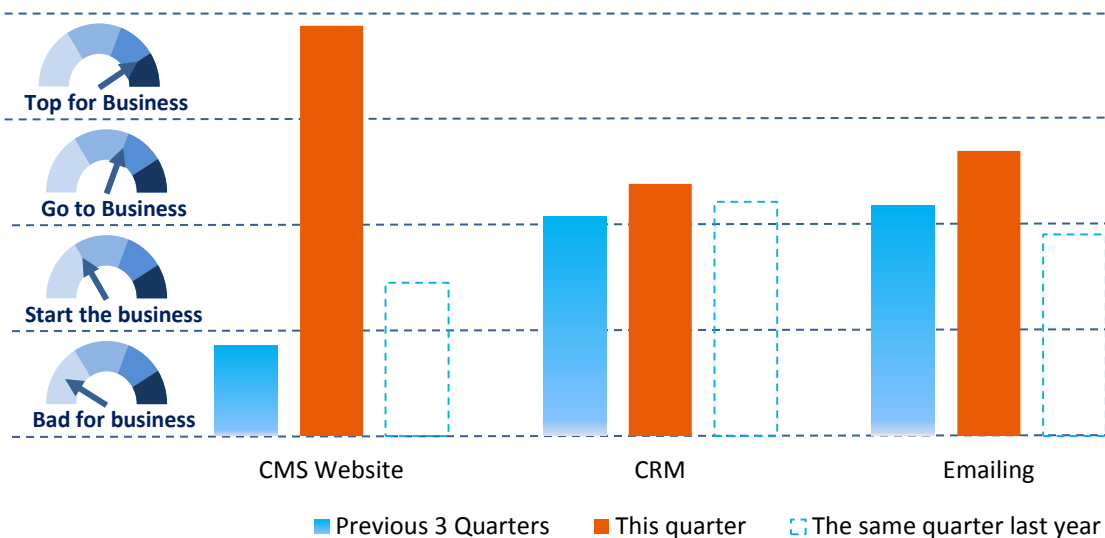4. United States
5. Eastern Europe

HRIS
1. Asia
2. Germany
3. France
4. United Kingdom
5. United States

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

These analyses are shown in diagram above.
There are 4 trend levels:
- "Bad for business" reflects a market with very low activity;
- "Start the business" indicates weak but existing activity;
- "Go to Business" reveals a dynamic commercial market;
- "Top for Business" is an exceptional situation highly favorable for sale opportunities.

Top 5 countries

CMS
1. Italy
2. Eastern Europe
3. Germany
4. United Kingdom
5. France

CRM
1. Eastern Europe
2. France
3. Italy
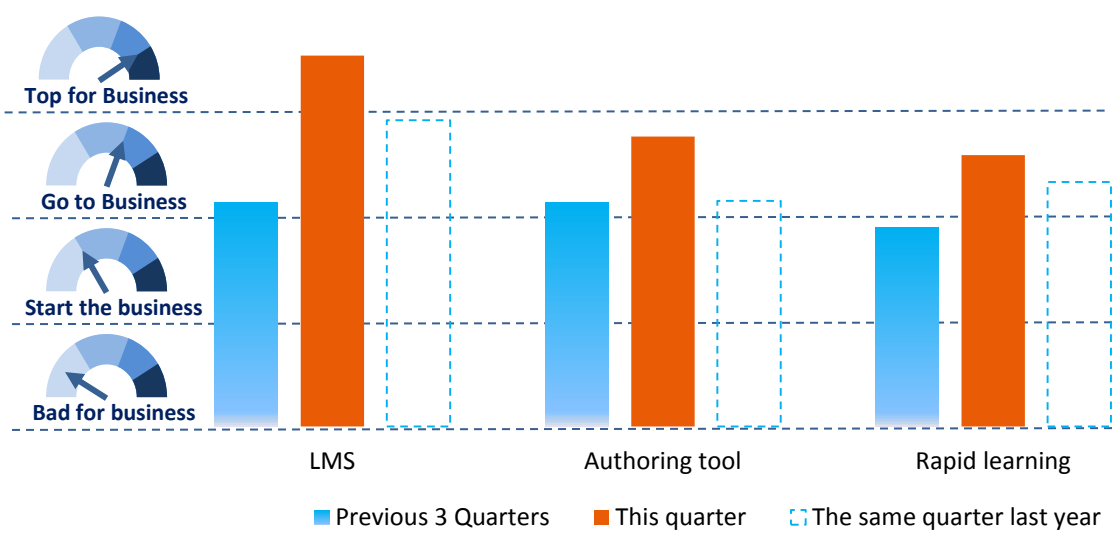4. Asia
5. Canada

Emailing
1. Germany
2. France
3. Eastern Europe
4. North Europe
5. United Kingdom

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

These analyses are shown in diagram above.
There are 4 trend levels:
- "Bad for business" reflects a market with very low activity;
- "Start the business" indicates weak but existing activity;
- "Go to Business" reveals a dynamic commercial market;
- "Top for Business" is an exceptional situation highly favorable for sale opportunities.
.

bsoco
business software comparison

Top 5 countries

Top for Business

Go to Business

Start the business

Bad for business

LMS   Authoring tool   Rapid learning

■ Previous 3 Quarters   ■ This quarter   □ The same quarter last year

LMS
1. United States
2. Asia
3. South-America
4. Canada
5. Germany

Rapid learning
1. South-America
2. Asia
3. France
4. United States
5. United Kingdom

Authoring tool
1. United States
2. Italy
3. Asia
4. Germany
5. France

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

These analyses are shown in diagram above.
There are 4 trend levels:
- "Bad for business" reflects a market with very low activity;
- "Start the business" indicates weak but existing activity;
- "Go to Business" reveals a dynamic commercial market;
- "Top for Business" is an exceptional situation highly favorable for sale opportunities.

bsoco
business software comparison

software top 50

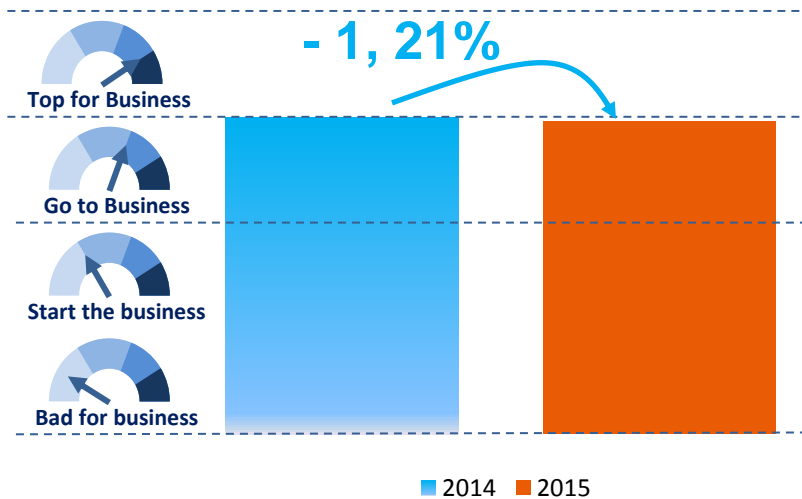| #	Δ	Software
1	♦ 0	MonPortailRH (HRIS, 8574 pts)
2	↑ 1	FileFinder Anywhere (Recruitment, 8514 pts)
3	↓ -1	ContaPyme (Accounting, 8005 pts)
4	↑ 1	Cornerstone Performance (Competency, 7841
5	↑ 5	Tryton (ERP, 7834 pts)
6	↓ -2	Compta One (Accounting, 7827 pts)
7	♦ 0	PurchaseControl (Accounting, 7617 pts)
8	new	OpenBravo (ERP, 7551 pts)
9	↓ -1	HRsmart Unified Talent Management (Compe
10	↑ 1	SIGMA-RH.net (HRIS, 7302 pts)
11	↓ -2	Zureo Contable (Accounting, 7202 pts)
12	new	Talentsoft Compétences (Competency, 7163 p
13	↑ 2	quarksUp Competencies (Competency, 7139 p
14	↓ -2	Welcome Real Time At Store (CRM, 7113 pts)
15	↑ 3	Inser Recrutement (Recruitment, 7051 pts)
16	↑ 5	JNetPublish (CMS Website, 7045 pts)
17	↑ 3	Infor ERP (ERP, 7000 pts)
18	↑ 1	Workday Talent Management (Competency, 6
19	↓ -6	Umantis (Competency, 6991 pts)
20	↑ 4	Candidatus (Recruitment, 6881 pts)
21	new	Talentsoft Recrutement Recruiting (Recruitme
22	↓ -5	Ecofin Cloud (ERP, 6870 pts)
23	↑ 4	OpenInfo3W ERP (ERP, 6862 pts)
24	↑ 2	Magento (CMS Website, 6812 pts)
25	↓ -9	Meta4 PeopleNet (HRIS, 6777 pts)
26	↓ -3	Drupal (CMS Website, 6776 pts)
27	↑ 3	OneAragon (HRIS, 6773 pts)
28	↑ 1	EmpXtrack HRMS (HRIS, 6764 pts)
29	↑ 2	WebPal (CMS Website, 6746 pts)
30	↓ -8	Xyleme (Authoring tool, 6695 pts)
31	↑ 7	Foederis Compétences (Competency, 6675 pts)
32	↑ 2	RECRUTOR (Recruitment, 6668 pts)
33	↑ 4	ADP Decidium (Paie) (Payroll, 6657 pts)
34	↑ 2	Epicor HCM (HRIS, 6653 pts)
35	↓ -3	IBM Kenexa LCMS (Authoring tool, 6651 pts)
36	↑ 4	e-doceo content manager LCMS (Authoring tool, 6618 pts)
37	↓ -2	ADP Decidium (HRIS, 6610 pts)
38	↑ 5	Netskills (Competency, 6585 pts)
39	↓ -6	Money S3 (Accounting, 6531 pts)
40	↑ 6	eXact LCMS (Authoring tool, 6521 pts)
41	new	Jobpartners ActiveRecruiter (Recruitment, 6519 pts)
42	↑ 2	Lumesse TalentLink (Recruitment, 6511 pts)
43	new	ORHUS V6 (Payroll, 6499 pts)
44	↑ 1	Mailpro (Email marketing, 6494 pts)
45	new	Power E-Mailer (Email marketing, 6468 pts)
46	new	Claro (Authoring tool, 6466 pts)
47	↑ 2	HumanSourcing (Recruitment, 6438 pts)
48	↓ -7	Articulate Storyline (Authoring tool, 6431 pts)
49	↑ 1	E-DEAL (CRM, 6428 pts)
50	new	Lumesse CourseBuilder (Authoring tool, 6427 pts)

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

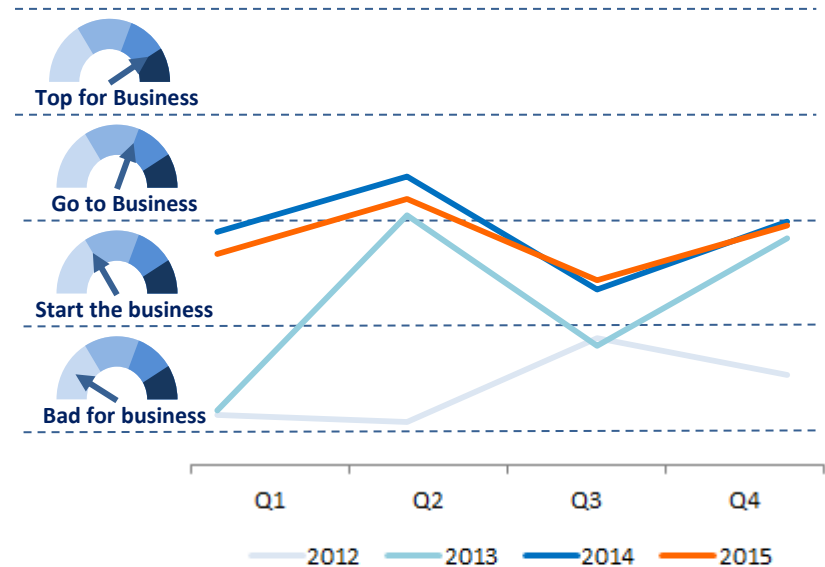This data is shown on the left side of this page.

Top 50 software packages in all categories:

Balance of the year 2015

software buying trend

software buying trend by quarter