

Executive Summary

April 2005 Study Results

SCHOOLS & UNIVERSITIES – MARKET SURVEY

I. STUDY OVERVIEW: A study of IT managers in over 800 schools and universities in North America, the UK and Europe running mixed printer brand networks was commissioned by Software Shelf International.

The purpose of the study was to look into the Printer market itself and determine what the largest problems were that schools and universities faced in the management of their printing.

Additionally, because no single printer company provided fast and easy to deploy, simple to use affordable solutions to these problems across mixed brand networks, the study was to find out if schools and universities with mixed printer brands would consider standardizing the majority of their printers to a single brand if their problems were successfully addressed by that brand.

II. SUMMARY OF FINDINGS:

The study clearly shows that schools and universities predominantly use Microsoft's operating systems on their workstations and their servers. However, as much as 35 percent of respondents would consider moving to an open software solution for their servers. Complexity and the lack of staff training to deal with it, the time and costs involved were the main reasons stated.

The majority of school and university IT managers surveyed are currently running some version of a Microsoft operating system. 72 percent of respondents were running *only* Microsoft operating systems throughout their networks with only 28 percent running mixed systems.

Specifically regarding their servers, the study revealed a significantly different picture. As much as 97 percent of respondents were running Windows NT, 2000 or 2003 and only 3 percent were running Linux on their servers.

As a note, the greatest concern preventing respondents from standardizing all of their computers to a Microsoft operating system had to do with the costs involved. Additionally, lack of staff training accounted for 23 percent of their hesitance to standardize.

Of significant importance, the survey also showed that respondents would actually be inclined to upgrade to Windows 2003 if there was a simple and fast way to do so requiring little training and distraction to their other duties.

Concerning Print Management, the study found *print waste* was the single largest and most difficult problem they have with their printing management efforts. The

survey also discovered that respondents were very concerned with addressing and handling *accounting for their printing*.

The survey further revealed that 88% of respondents running mixed printer brand networks who, after deploying Software Shelf International's print management solution, said that Microsoft Certified, Print Manager Plus® provided a simple, effective and easy to use solution to each of the problems found throughout their network regardless of the brand of printers running.

Finally, with respect to printer brands, the survey found that significant increases in the school and university market share were available to those printer manufacturers who addressed these issues head on. For example, the majority of respondents said they would likely or most likely standardize their mixed printer brands to a single brand if a printer company provided a simple, effective and easy to use solution to the print management problems noted above.

III. KEY PRINT MANAGEMENT CONCLUSIONS:

In this survey, respondents were very clear as to the problems they encounter in the management of their printing services. Accounting for their printing and handling their Printing Waste were the most difficult tasks to successfully handle across their networks. These were the chief areas of concern and difficulty and schools and universities are seeking simple and effective solutions to them.

Based on the findings of this study a printer manufacturer could gain as much as an additional 63% of the school and university market by providing a simple, effective and easy to use site-wide solution to these print management problems.

88% of the respondents who had installed Print Manager Plus on their mixed printer networks and found it to be a simple, effective and easy to use solution to all of their print management problems across all of their printer brands.

IV. SURVEY RESPONSES

Note: This summary includes a sampling of questions included in the survey.

a. Regarding Their Operating Systems

What percent of your computers are running on a Microsoft operating system?

100 Percent Microsoft – 72%

85+ Percent Microsoft – 28%

What do your servers run on?

Windows 2003 – 52%

Windows 2000 – 39%

Windows NT – 6%

Linux – 3 %

What is your biggest concern regarding standardizing all of your computers to the Microsoft operating system?

The cost – 57%

Lack of staff training – 23%

Inadequate Microsoft Support – 11%

What is the biggest barrier to upgrading your server to Windows 2003?

Don't have time – 61%

Too Expensive – 29%

Too Complicated – 10%

If you could deploy the Windows 2003 server in a simple, fast way that required very little training or distraction to your other duties, would you be inclined to upgrade?

Yes – 85%

No – 15%

b. Regarding Their Print Management:

What are your biggest problems with managing your printing?

Printing Waste – 63%

Accounting of printing – 33%

Other – 4%

If a single printer brand provided a simple, effective and easy to use solution to your biggest print management problems would you consider standardizing your printers to a single brand?

Likely or Most Likely - 63%

Not sure - 37%

Did Print Manager Plus provide you with a simple, effective and easy to use solution to this problem on all of your printer brands?

Yes - 88%

No - 12%

+++++