

## SURVEY

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### **Western Europe, Government Sector, Web Services and New Technologies, Levels of Adoption and Investment Plans: An IDC Survey**

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#### **IDC OPINION**

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IDC believes that investment in leading-edge technologies will play a relevant part in government IT strategies. Investments in Internet technologies, Web services and other new technologies will contribute to the development of long-term integrated egovernment frameworks.

- Web sites are at the core of government plans to grow responsiveness and accessibility of citizen services. Most Western European governments still need to enhance transactional capabilities of their portals.
  - Web services architectures are expected to speed up the development of new solutions and prompt the integration of disparate systems.
  - To grow flexibility and security of access to IT resources, governments are also expected to invest in remote access, IP VPN, and wireless LANs.
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## TABLE OF CONTENTS

	P
<b>In This Study</b>	<b>1</b>
Methodology .....	1
Definitions .....	5
Executive Summary .....	6
<b>Situation Overview</b>	<b>7</b>
How Western European Government Agencies Use the Web.....	7
Are Governments Adopting Web Service Technology? .....	8
Western European Government's Familiarity With New Technologies .....	10
<b>Future Outlook</b>	<b>13</b>
Governments' Future Plans Regarding Web Services.....	13
Governments' Plans for Investment in New Technologies.....	16
<b>Essential Guidance</b>	<b>22</b>
Web Sites .....	22
Web Services .....	22
Other New Technologies .....	22
<b>Learn More</b>	<b>23</b>
Related Research .....	23

## LIST OF TABLES

	P
1 Vertical Market Quotas.....	2
2 Company Size Quotas .....	3
3 Number of Completes by Country .....	3
4 Western Europe, Government Sector, Level of Familiarity With New Technologies .....	12
5 Western Europe, Government Sector, Inhibitors to Investment in Web Services.....	16

## LIST OF FIGURES

	P
1 Western Europe, Government Sector, Activities Available on the Agency's Web Site .....	8
2 Western Europe, Government Sector, Status Regarding Web Services.....	9
3 Western Europe, Government Sector, Level of Familiarity With New Technologies .....	11
4 Western Europe, Central Government Sector, Investment plans in Web Services .....	14
5 Western Europe, Local Government Sector, Investment plans in Web Services .....	15
6 Western Europe, Central Government Sector, New Technologies Investment Plans .....	17
7 Western Europe, Local Government Sector, New Technologies Investment Plans .....	18
8 Western Europe, Central Government Sector, New Technologies Investment Plans .....	20
9 Western Europe, Local Government Sector, New Technologies Investment Plans .....	21

## IN THIS STUDY

In this study IDC provides an analysis of results of the IDC Vertical Market Survey carried out in France, Germany, Italy, Spain, and the U.K. The results are based on 77 interviews in the central government market and 145 interviews in the local government market.

This study analyzes the level of adoption of Web and Web service technologies and of new technologies and related investment plans. This is the fourth in a series of studies that includes:

- ☒ Analysis of investment priorities and 2004 investment plans for enterprise and industry-specific solution areas
- ☒ Analysis of IT spending patterns, channel selection, and levels of satisfaction with current suppliers
- ☒ Analysis of the installed base and 2004 investment plans concerning storage and server infrastructure

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## Methodology

### ***Conceptual Framework***

IDC's Vertical Market Survey 2003 is a landmark study of IT solutions, investment priorities, and emerging technologies in over 73% of the European economy. It is fully projectable across countries, industries, and size classes, and, in conjunction with other IDC research, offers an unprecedented view of solutions and emerging technologies' adoption and issues around Europe. Themes include horizontal applications (including ERP, CRM, content management, datawarehouse/business intelligence), mobile/wireless solutions, security, Web services, server and storage, emerging technologies, and industry-specific applications.

### ***Sample Design***

#### **Sampling Unit: IDC's Economic Entity**

For IDC's vertical research purposes, an "economic entity" refers to a legal or social entity, or a group of entities, that engage(s) in economic activities and transactions (such as the purchase of IT goods and services) in its/their own right. The requirements of an enterprise are that it has one ownership or control. It can be heterogeneous with regard to its economic activity as well as to its location. It has legal, administrative, or fiduciary arrangements, organizational structures or other parties having the capacity to efficiently allocate resources in order to achieve objectives. Examples include corporations, non-profit institutions, or government units. When the enterprise is a single location organization the concept of enterprise and local unit/establishment coincide.

For IDC's vertical research statistics the most referred economic entity is the "enterprise/organization," ultimately referring to an economic entity with:

- A common IS strategy
- An associated decision process and implementation
- A common IS budget
- A common production process
- A common financial process

IDC has therefore selected the enterprise as the sampling unit. Only enterprises with more than 20 employees were considered in this survey.

### Sample Quotas

The sample quota consisted of 390 completes for the U.K., France, and Germany (major sample quotas) and 250 for Italy and Spain (minor sample quota).

Major and minor sample quotas by vertical market and enterprise size are illustrated in Tables 1 and 2.

Vertical markets are defined according to the NACE coding system and enterprise sizes are based on the number of personnel employed and are aggregated into the following segments: 20–99, 100–249, 250–499, 500–999, and 1,000+.

**TABLE 1**

### Vertical Market Quotas

	Major Sample Quotas	Minor Sample Quotas
Banking	45	25
Insurance/other finance	30	15
Retail/wholesale	30	15
Discrete manufacturing	50	30
Process manufacturing	40	35
Transport	30	15
Telecommunications and media	35	25
Utilities	25	10
Local government	25	20
Central government	25	20
Healthcare	20	15
Education	20	15
Business services	15	10
<b>Total</b>	<b>390</b>	<b>250</b>

Note: Major sample quotas used for France, Germany, and the U.K. Minor sample quotas used for Italy and Spain.

Source: IDC, 2003

**TABLE 2**

## Company Size Quotas

	Major Sample Quotas	Minor Sample Quotas
20–99 employees	78	50
100–249 employees	78	50
250–499 employees	78	50
500–999 employees	78	50
1,000+ employees	78	50
<b>Total</b>	<b>390</b>	<b>250</b>

Note: Major sample quotas used for France, Germany, and the U.K. Minor sample quotas used for Italy and Spain.

Source: IDC, 2003

**Sample Frame and Sampling Method**

The sample frame was obtained from a list source representative of the entire local market, regardless of computerization. List sources grouped vertical markets according to the standardized industries (NACE codes). A stratified sampling method without replacement was used, with enterprises with more than 20 employees selected randomly within each vertical/size cell.

A predetermined number of interviews were completed in each enterprise size and industry category to ensure an adequate sample to report on for each size and industry group for each country at the 95% confidence interval.

We attempted to meet sample quotas +/-5 interviews. Target completes are shown in Tables 1 and 2. These were met for the total country (see Table 3). However, due to timeline, budget constraints, and difficulties related to the real structure of the market, they were not met for all the verticals and enterprise sizes.

**TABLE 3**

## Number of Completes by Country

	Completes
France	389
Germany	397
Italy	250
U.K.	398
Spain	252
<b>Total</b>	<b>1,686</b>

Source: IDC, 2003

### ***Respondents***

Eligible respondents were the individuals at each enterprise best qualified to speak about the enterprise's overall computing activities. For medium/large enterprises, the respondent was most likely the CIO, an IT director, or IT manager. For small enterprises, it was more likely an IT manager or owner. A screening question determined eligibility.

### ***Interviews***

Interviews were conducted via a telephone format, which allowed trained interviewers to clarify some of the more complex questions in order to ensure accurate, meaningful responses. A computer-aided telephone interviewing system (CATI, which permitted simultaneous interviewing and data entry) was used wherever possible. This system provided various automatic data checks and skip patterns, which occurred while the respondent remained on the line.

### ***Questionnaires***

The survey was conducted in the native language of each country.

The interview was terminated if there were no PCs installed at the enterprise. This means that results may be generalized only to computerized enterprises with more than 20 employees.

### ***Interview Schedule***

The survey took place in November/December 2003.

### ***Confidence Intervals***

A random sample generating proportional results from 100 cases will yield results within +/-9.8% of the estimated proportion at the 95% confidence interval. Thus, if sample results indicate that 50% of all respondents in the small (20–99) employee range have a home page, the 95% confidence interval will be 50% +/-9.8%. That is, if the same question was asked again and again to different samples, 95% of the time the confidence interval from 40.2% to 59.8% will hold the true population proportion. As the sample size increases, the interval shrinks. As the proportion becomes closer to either 0% or 100%, thereby indicating less variation, the interval shrinks. Actual intervals for specific questions vary due to variations in sample size.

### ***Weighting***

Stratified sampling required sample weights to reflect actual populations. Two methods of weighting were used: number of enterprises and number of employees. The enterprise-weighting scheme reflects the actual distribution of enterprises in the real world across size and industry. The employment scheme reflects the distribution of employees at enterprises across size and industry.

For the purpose of this study the employee weighting-scheme has been adopted.

## ***Analysis of the Data***

SPSS was used to analyze the data collected.

The survey was composed both by categorical and interval measurement variables. The categorical variables like the vertical markets one were recoded by SPSS as numeric (for example, the values yes and no were recoded as 1 and 2). For the categorical variables, the analysis was made using a cross-tabulation between the variable and the vertical markets. The cross-tabulation analysis gives the distribution of the vertical market among the categories of the observed variable and the distribution of the categories of the observed variable among the vertical markets and the overall distribution. For the interval measurement variables, like percentages, we used the compare means analysis, which gives the mean values of the variable among the vertical markets as well as the overall mean.

The five countries surveyed were France, Germany, Italy, the U.K., and Spain. There were 20 vertical markets classified by the survey. For reporting purpose, we grouped them into 10. For example, pharmaceuticals, chemicals, and other process were grouped into process manufacturing. Results are therefore provided for the following sectors:

- Banking
- Insurance and other finance
- Discrete manufacturing
- Process manufacturing
- Healthcare services
- Transport, telecommunications, media, and utilities
- Retail and wholesale
- Business services
- Education
- Government

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## **Definitions**

### ***Government Market Definition***

Government refers to all public administration, defense, and justice activities. Government comprises: executive, legislative, and general government, except finance; justice, public order, and safety; public finance, taxation, and monetary policy; administration of human resource programs; administration of environmental quality and housing programs; administration of economic programs; national security and international affairs.

Federal or Central governments are the governmental structure associated with national self-identity and responsible for all citizens, typically headquartered in one or more capital cities but radiating throughout society. NACE code 75

State and local governments are any governmental structure (state, province, county, city, town, etc.) other than and lower ranking than the central government. NACE: 75 and 90

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## **Executive Summary**

This survey report analyzes the adoption and investment plans of central and local government agencies in the following technologies:

- Web sites
- Web services
- Other new technologies: e.g. remote access, wireless LAN, IP VPN, server and storage consolidation, etc.

### ***Web Sites***

Many Western European governments have online information for their citizens, but few have already invested in online payment and ordering and to integrate Internet self-service with call centers.

### ***Web Services***

Central and local government organizations plan to expose to Web Services architectures:

- Customer facing applications
- Legacy applications
- Vertical specific applications

### ***Other New Technologies***

Many governments are investing or plan to invest in:

- Remote access
- IP VPN
- Wireless LAN
- Storage consolidation

## SITUATION OVERVIEW

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### **How Western European Government Agencies Use the Web**

The advent of the Internet is causing fundamental changes in the way governments work. Driven by the European, national, and local e-government initiatives, public administrations are deploying Web sites as a key channel for the interaction with citizens, suppliers and other public agencies.

In this chapter IDC analyzes the results of its vertical market survey explaining how government agencies are currently using the Web.

IDC's survey indicates that around 70% of PCs in Western European government agencies access the Internet and that around 85% of government agencies responding to the IDC vertical market survey have a publicly accessible Web site.

Figure 1 illustrates activities available on the agencies' Web sites. Two points clearly stand out from it:

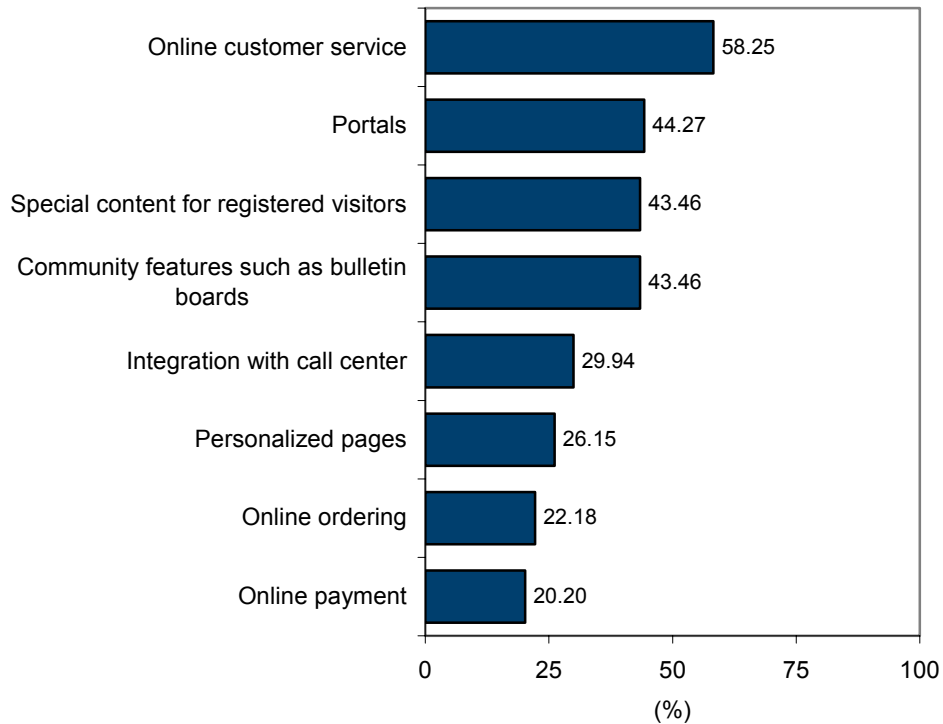
- Online customer services are available on almost 60% of the respondents' sites
- Only around 20% of respondents have either online ordering or online payment

This analysis highlights that the degree of sophistication is still rather low at present. Therefore we can conclude that a lot of progress still has to be made in order to achieve the last level of full online transactions (payments and deliveries included) advocated by the eEurope 2005 Action Plan and by several national e-government plans.

**FIGURE 1**

**Western Europe, Government Sector, Activities Available on the Agency's Web Site**

*Which of the following activities are currently available on the Web site?*



Note: Respondents = 34

Source: IDC, European Vertical Market Survey, 2003

**Are Governments Adopting Web Service Technology?**

The Internet and other networked solutions that make it possible to access data and applications from multiple locations are part of a transformation that is also changing the way those solutions are developed and integrated. In particular, the wider acceptance of common standards, such as Java language and XML data formats, is prompting the penetration of Web services architecture.

This section analyzes the IDC survey results referring to the current status of adoption of Web services in Western European central and local government organizations.

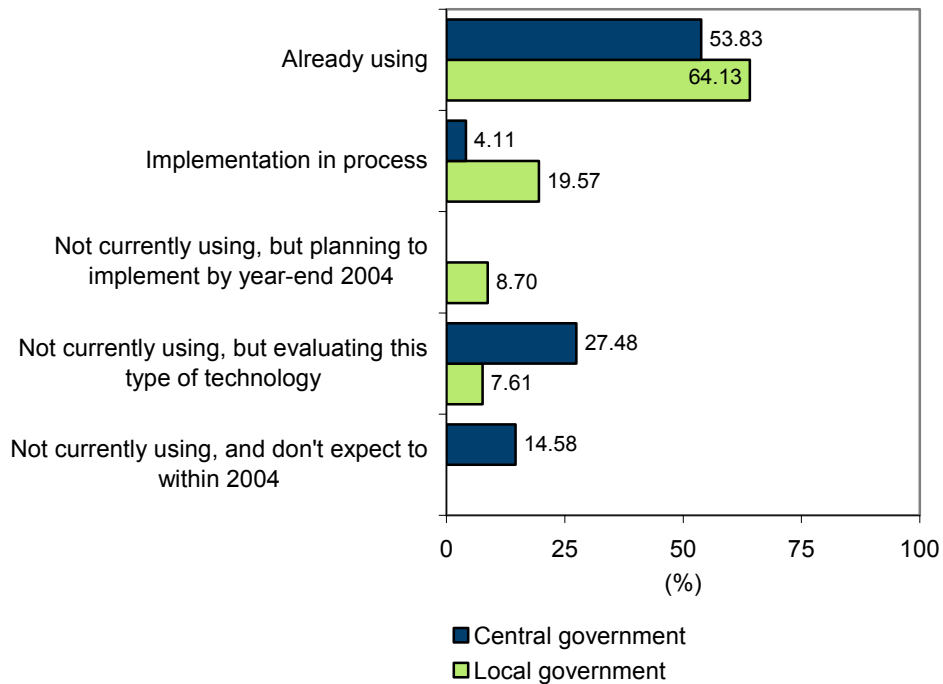
Figure 2 depicts governments' attitudes towards Web service technology. Local governments stand out as keener in the usage and future adoption of Web services. The growing devolution of tasks from central to local authorities is prompting the latter to invest in modern technologies that ensure interoperability of solutions among departments, with nearby agencies, and with central governments to create responsive citizen services. All local government respondents gave a positive answer to this technology, and if we consider governments that are both already using such devices or have their implementation scheduled by the end of the year we end up with more than 80% of total replies.

At the central government level, though more than half of respondents stated that they are already using Web services, almost 15% do not expect to implement them within 2004.

**FIGURE 2**

Western Europe, Government Sector, Status Regarding Web Services

*Which of the following statements most accurately describes your organization's status regarding the use of Web services?*



Note: Central government respondents = 16; local government respondents = 24

Source: IDC, European Vertical Market Survey, 2003

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## **Western European Government's Familiarity With New Technologies**

Western European governments do not limit their evolution toward usage of new technologies to the Internet and Web services. A number of other leading-edge solutions are known and considered for investment, such as IP telephony, wireless networks, peer-to-peer computing and system virtualization.

In this paragraph IDC presents the results of its vertical market survey that highlight the level of familiarity of local and central governments with those new technologies.

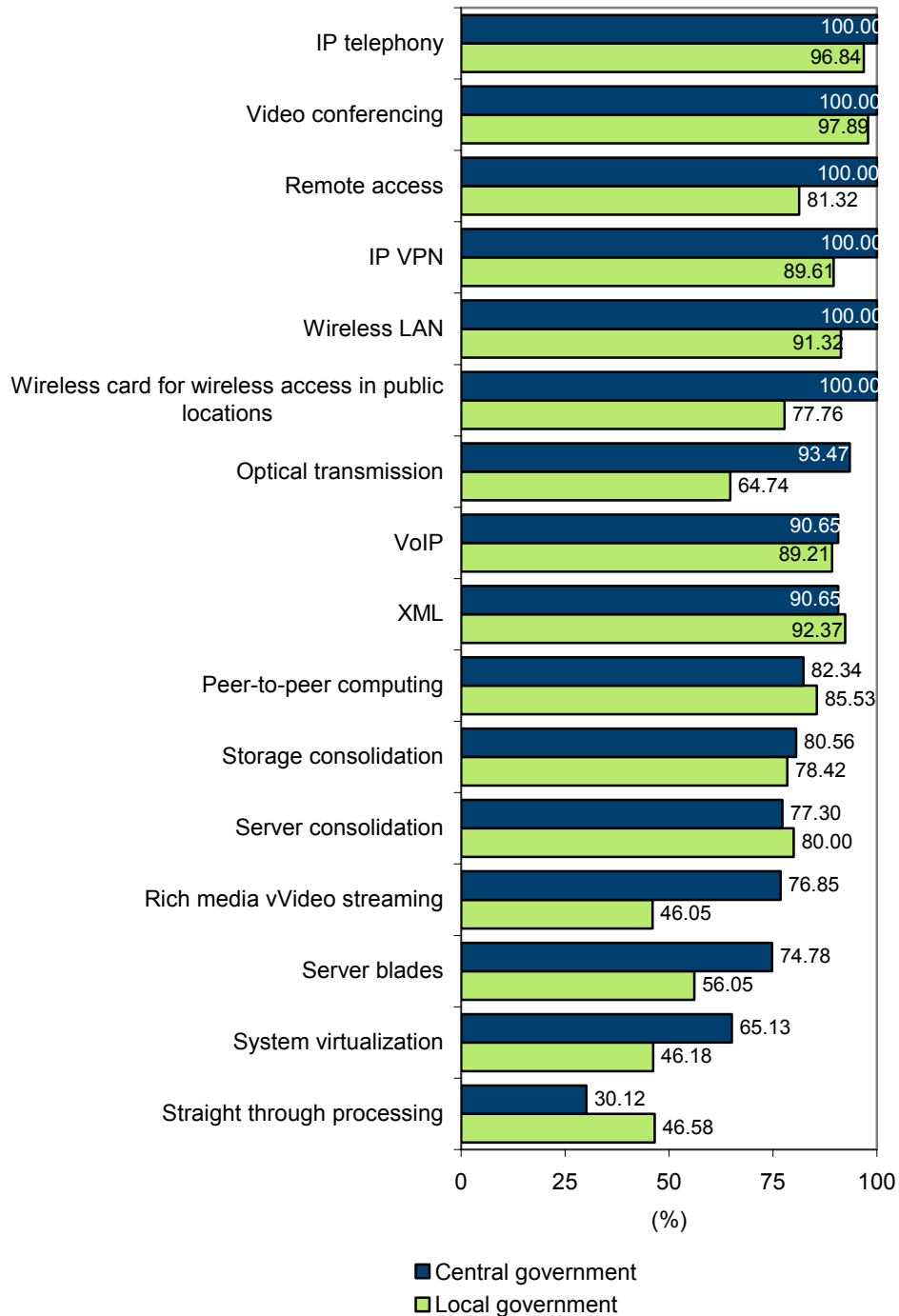
When we consider the degree of openness and familiarity with new technologies among governments in Figure 3, we find that:

- ☒ Governments at both levels show a similar degree of familiarity (less than 10% difference) when asked about IP telephony, video conferencing, wireless LAN, voice over IP, XML, peer-to-peer computing, storage and server consolidation
- ☒ Central governments usually show a higher degree of familiarity, except for XML, peer-to-peer computing, server consolidation, and straight through processing
- ☒ The slightly higher familiarity of local governments with XML is also aligned with the higher levels of adoption of Web services highlighted in the previous section

**FIGURE 3**

Western Europe, Government Sector, Level of Familiarity With New Technologies

*Do you know the following technologies?*



Note: Central government respondents = 17; local government respondents = 30

Source: IDC, European Vertical Market Survey, 2003

Countries are not aligned in terms of familiarity with new technologies. Table 4 illustrates this point.

- ☒ On one hand we find similarities about the level of familiarity when considering video conferencing, wireless LAN, IP telephony, server blades, IP VPN, XML, voice over IP and remote access.
- ☒ On the other hand differences exist for instance in the case of server consolidation.

Focusing on single countries, we find that:

- ☒ In Italy and Spain more than half of the respondents knew all the technologies asked about, but slightly less than 50% were familiar with rich media video streaming in Italy and with storage consolidation in Spain.
- ☒ Italy, Spain, and the U.K. are the three countries where more than 80% of the respondents gave positive answers about their familiarity with new technologies.

**TABLE 4**

Western Europe, Government Sector, Level of Familiarity With New Technologies

*Do you know the following technologies?*

	<b>France</b>	<b>Germany</b>	<b>Italy</b>	<b>Spain</b>	<b>U.K.</b>
IP telephony	92.1	97.1	100.0	100.0	100.0
Video conferencing	96.1	97.1	100.0	100.0	100.0
Remote access	96.1	74.2	100.0	100.0	88.1
IP VPN	92.1	89.5	100.0	100.0	93.6
Wireless LAN	92.1	97.1	100.0	95.5	93.6
Wireless card for wireless access in public access locations (airports, hotels)	92.1	56.7	100.0	100.0	93.6
Optical transmission	81.3	89.1	55.8	87.5	78.9
Voice over IP	84.2	94.2	100.0	100.0	81.7
XML	92.1	97.1	100.0	100.0	81.7
Peer-to-peer computing	46.3	89.1	100.0	68.2	93.6
Storage consolidation	53.2	97.1	72.7	48.9	93.6
Server consolidation	31.5	97.1	86.3	48.9	93.6
Rich media video streaming	41.9	35.6	44.2	63.6	87.2
Server blades	62.6	66.5	69.5	68.2	61.6
System virtualization	38.4	53.8	61.0	87.5	48.6
Straight through processing	31.5	30.9	57.8	63.6	28.6

Note: Respondents = 44

Source: IDC, European Vertical Market Survey, 2003

## FUTURE OUTLOOK

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### **Governments' Future Plans Regarding Web Services**

As governments proceed in their modernization, their IT strategic focus will shift more and more from deploying online services and automating back office operations to link all systems together. This will ensure that they are able to seamlessly deliver citizens services from any agency and at any time (see also *Western Europe, Government Sector, 2003-2008, IT Spending Forecast; IDC #PP04L, May 2004*).

Web service architectures are expected to be one of the building blocks of this intertwined IT environment. Looking at future developments of Web services (Figure 4), the most likely scenario for investment plans by central governments would involve customer facing and legacy applications, while a smaller number of the respondents are considering applications such as vertical, business critical, and inventory management systems over the next year.

Considering local governments (Figure 5):

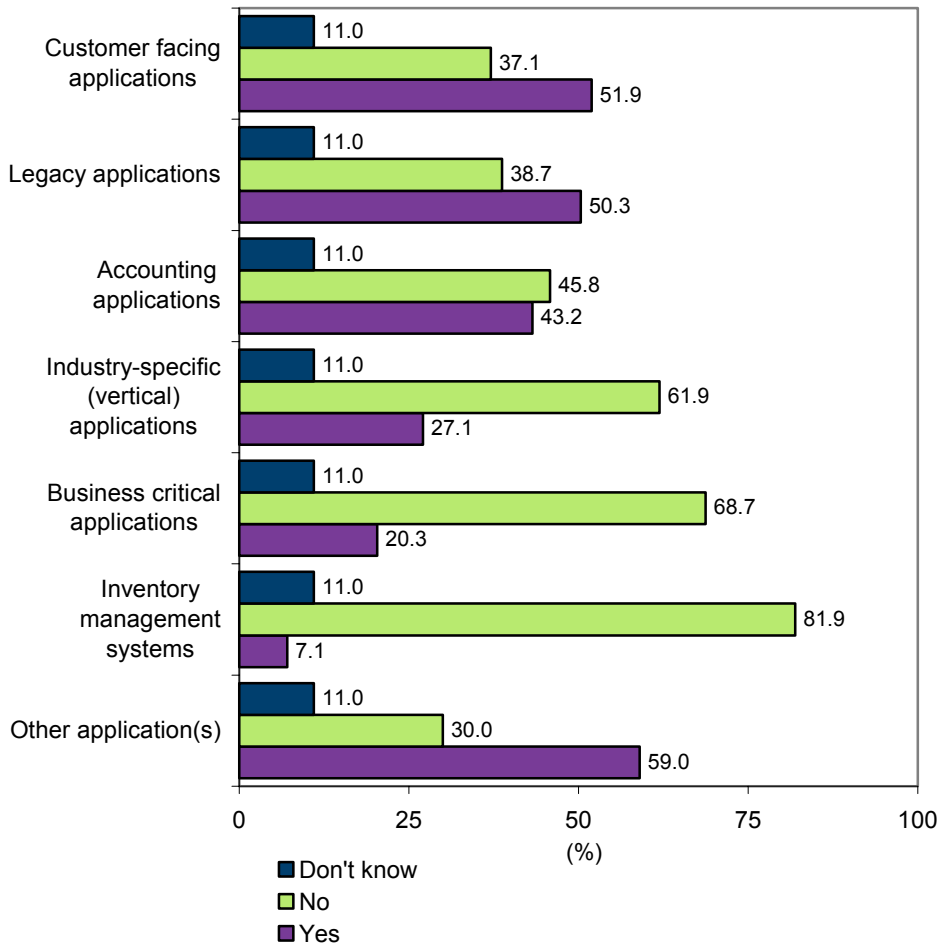
- ☒ A large number of respondents plan to expose customer-facing applications to Web services. This is strictly related to the need to increase the responsiveness of the growing number of services that local authorities are responsible for.
- ☒ Also, between 35% and 50% of respondents have short term investment plans in Web services for vertical specific, business critical, and legacy applications

The average high level of attention toward Web services architecture for legacy applications indicates that both central and local agencies plan to integrate new solutions with existing information systems to leverage on past investment.

**FIGURE 4**

**Western Europe, Central Government Sector, Investment plans in Web Services**

*Which application will be exposed in a Web services environment within the next 12 months?*



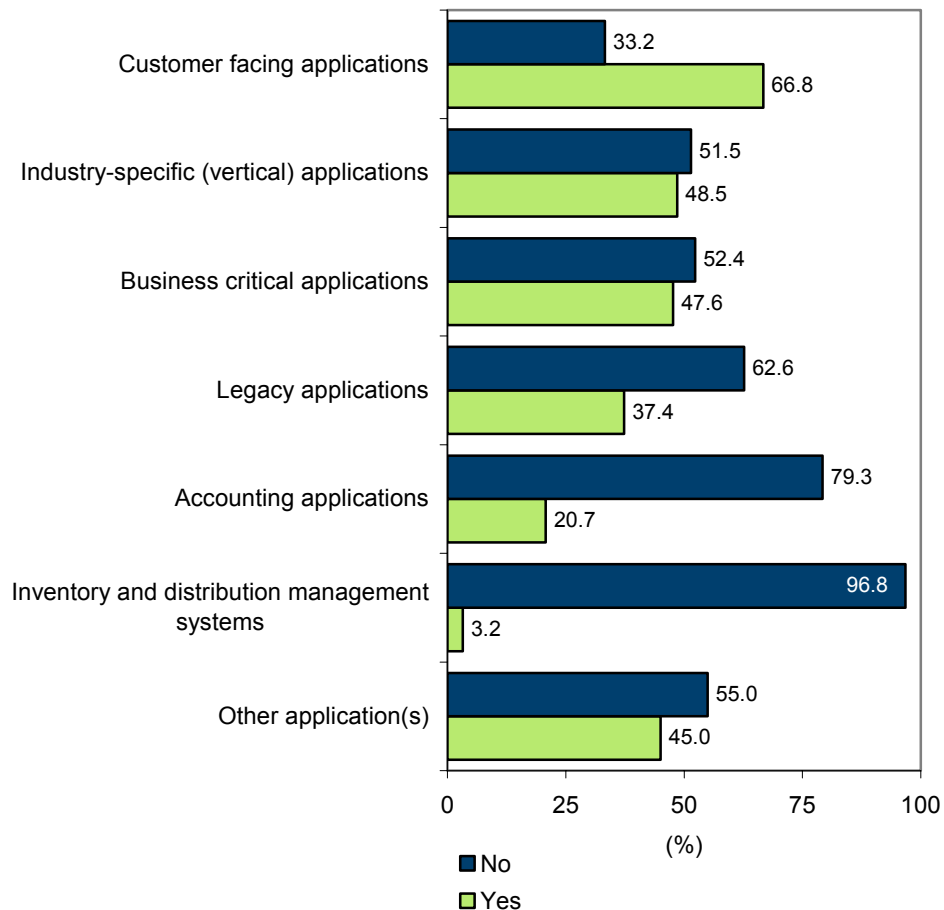
Note: Respondents = 9

Source: IDC, European Vertical Market Survey, 2003

**FIGURE 5**

**Western Europe, Local Government Sector, Investment plans in Web Services**

*Which application will be exposed in a Web services environment within the next 12 months?*



Note: Respondents = 22

Source: IDC, European Vertical Market Survey, 2003

There are several factors that explain the conservative approach toward Web services, especially in some application areas. The key concerns hindering the implementation of Web services in the next year are (Table 5):

- Security. Security is by far the key concern, highlighted by more than 70% of respondents.
- Lack of strategic focus. This highlights that a few agencies still have to fully understand the critical role of integration of data and applications.
- Few clear benefits.

**TABLE 5****Western Europe, Government Sector, Inhibitors to Investment in Web Services***Reasons for not implementing a Web services in the next 12 months*

Security concerns	72.6
Not part of organization's strategy/business model	49.82
Few obvious benefits	42.35
Lack of project funding/high cost	38.08
Project does not demonstrate strong ROI	27.76
Not gaining executive management support or organization buy-in	27.76
Lack of technical expertise/skilled personnel in house	15.66
Market is too immature — lack of trust in standards	7.83

Note: Respondents = 9. Base = respondents that do not plan to invest in Web services

Source: IDC, European Vertical Market Survey, 2003

### **Governments' Plans for Investment in New Technologies**

This last paragraph describes the key findings in terms of central and local governments' investment plans for new technologies. The questions were asked of all respondents that are familiar with these new technologies (see Figure 3).

Both at the central government level (Figure 6) and at the local government level (Figure 7), the key investment areas are:

- Remote access
- Storage and server consolidation
- IP VPN
- Wireless LAN
- XML

More than 75% of respondents — among those that are familiar with these technologies — plan to invest in those five categories. The priorities are not standalone product requirements, but are strictly related to top level IT guidelines:

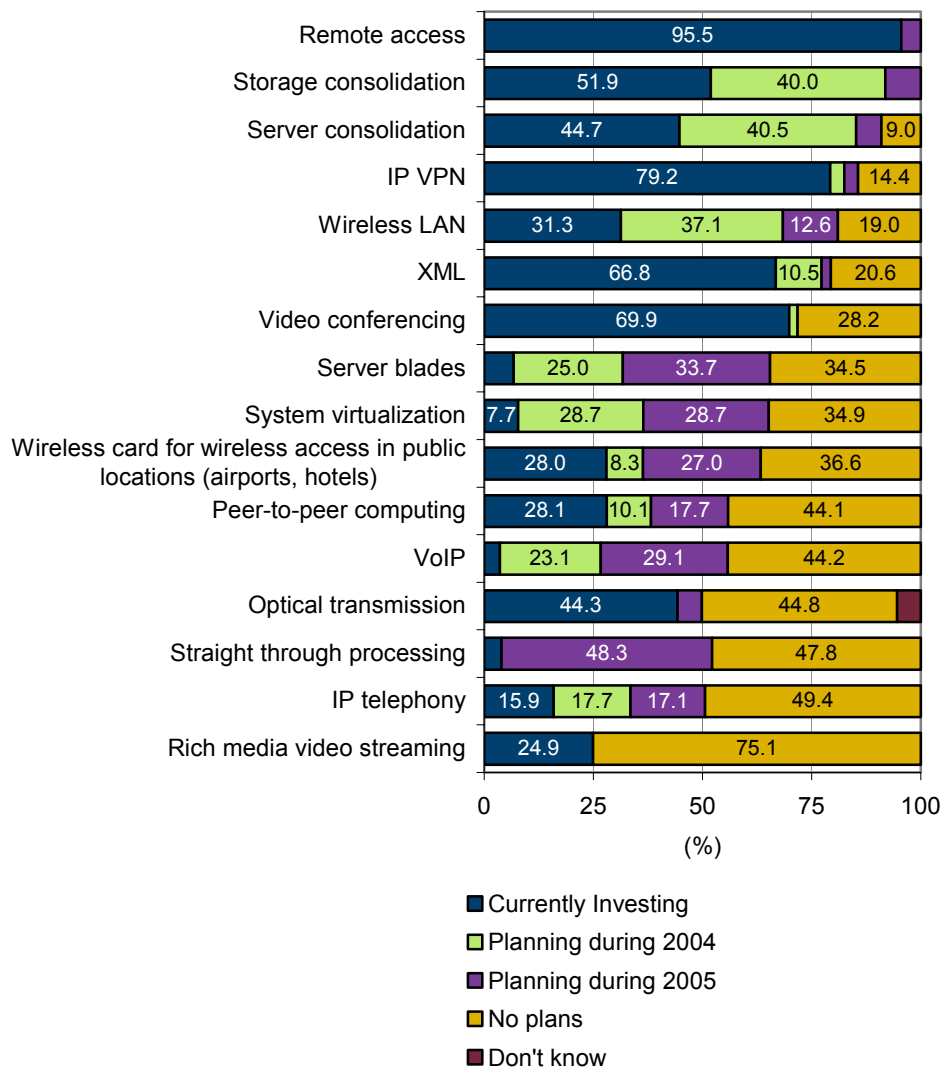
- Remote access and wireless LAN are fundamental components of the mobility infrastructure that will enable civil servants to flexibly operate both onsite and on the road.
- IP VPN has become a critical component of the security infrastructure of government agencies. The growth of investments in mobile/remote access is determining further growth of investment in this technology.

- ☒ Investment in storage and server consolidation is driven by the need to optimize the management of infrastructure and support interoperable systems that overcome existing island solutions that duplicate costs.
- ☒ XML data format is a key component of the Web services architecture that will prompt easier and more interoperable development of solutions.

**FIGURE 6**

**Western Europe, Central Government Sector, New Technologies Investment Plans**

*Please indicate which one of the following statements most accurately describes your organization's status regarding the following technologies*



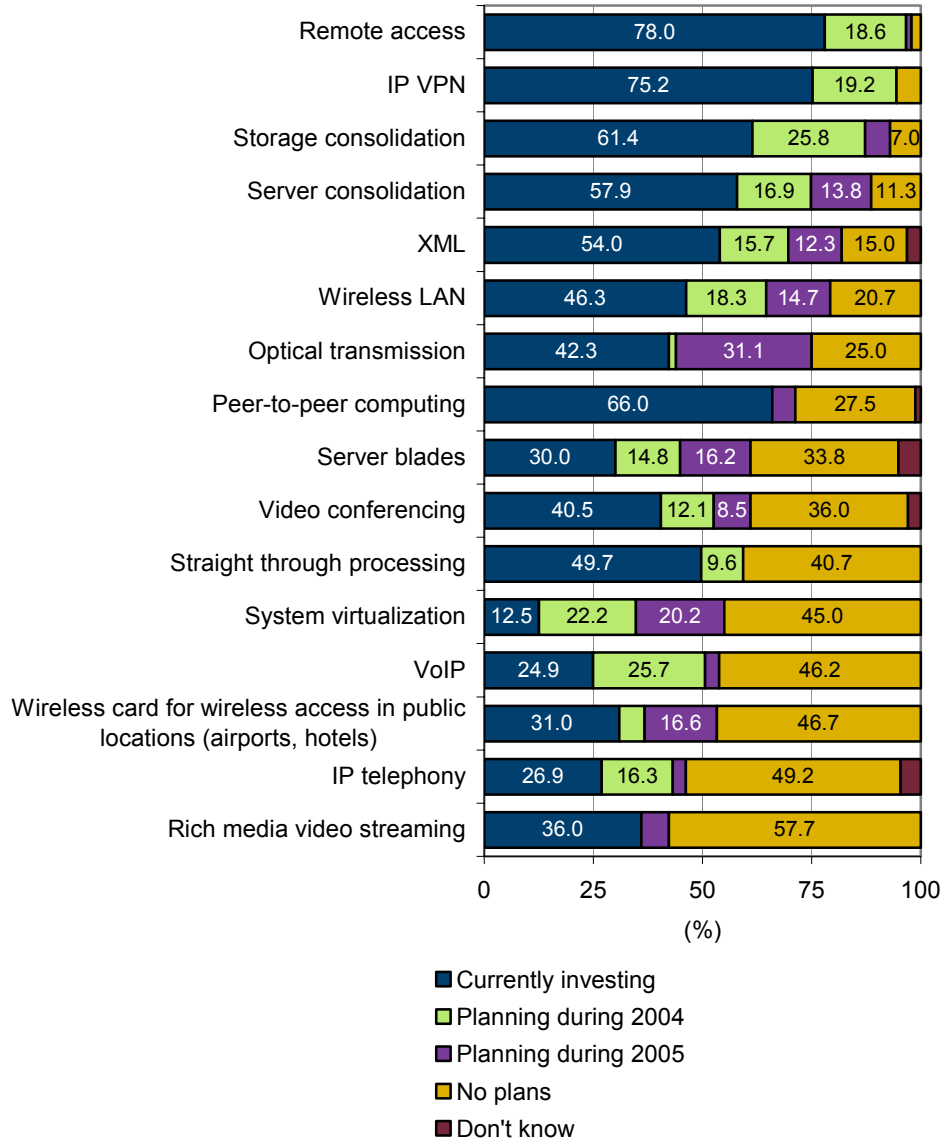
Note: Central government respondents = 17; Base = respondents that are familiar with the solution

Source: IDC, European Vertical Market Survey, 2003

**FIGURE 7**

**Western Europe, Local Government Sector, New Technologies Investment Plans**

*Please indicate which one of the following statements most accurately describes your organization's status regarding the following technologies*



Note: Local government respondents = 28; Base = respondents that are familiar with the solution

Source: IDC, European Vertical Market Survey, 2003

The questions depicted in Figures 6 and 7 were asked only to respondents that are familiar with those new technologies. To reconcile the level of familiarity (Figure 3) with the investment plans, the following Figures (8 and 9) analyze the share of total respondents that plan to invest in the short to medium term, regardless of whether they are familiar or not.

At the central government level (Figure 8):

- The most important area of investment is remote access
- The second and third most important new technologies in terms of investment plans are IP VPN and wireless LAN, which, because of the higher level of familiarity

In Figure 6, the second was storage consolidation, but because of the lower familiarity — only 80.6% of central governments (Figure 3) — the actual share of potential investors is lower, when considering the entire vertical.

At the local government level (Figure 9):

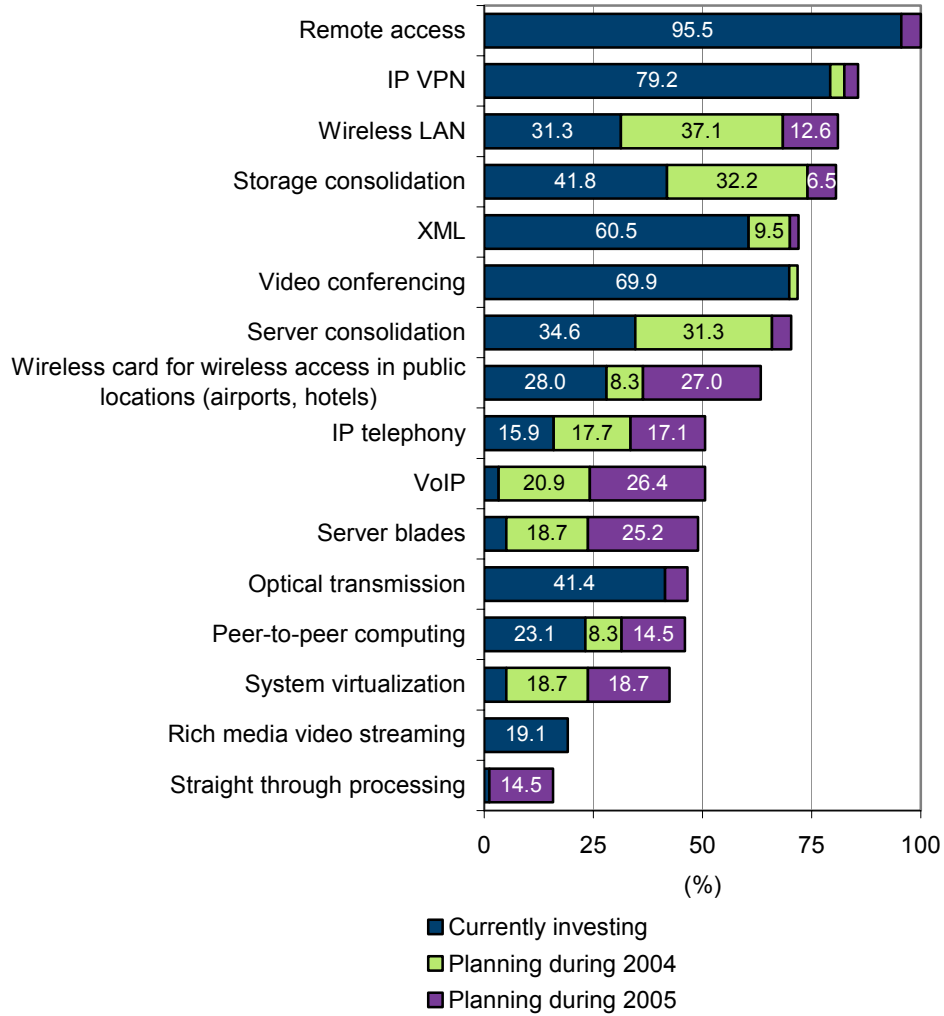
- The most important area of investment is IP VPN, which because of the higher level of familiarity, becomes more important than remote access
- The second and third most important new technologies in terms of investment plans are remote access and XML, which, because of the higher level of familiarity, become more important than storage consolidation.

In Figure 7 the first was remote access, but because of the lower familiarity — only 81.3% of local governments (Figure 3) — the actual share of potential investors is lower when considering the entire vertical.

**FIGURE 8**

**Western Europe, Central Government Sector, New Technologies Investment Plans**

*Please indicate which one of the following statements most accurately describes your organization's status regarding the following technologies*



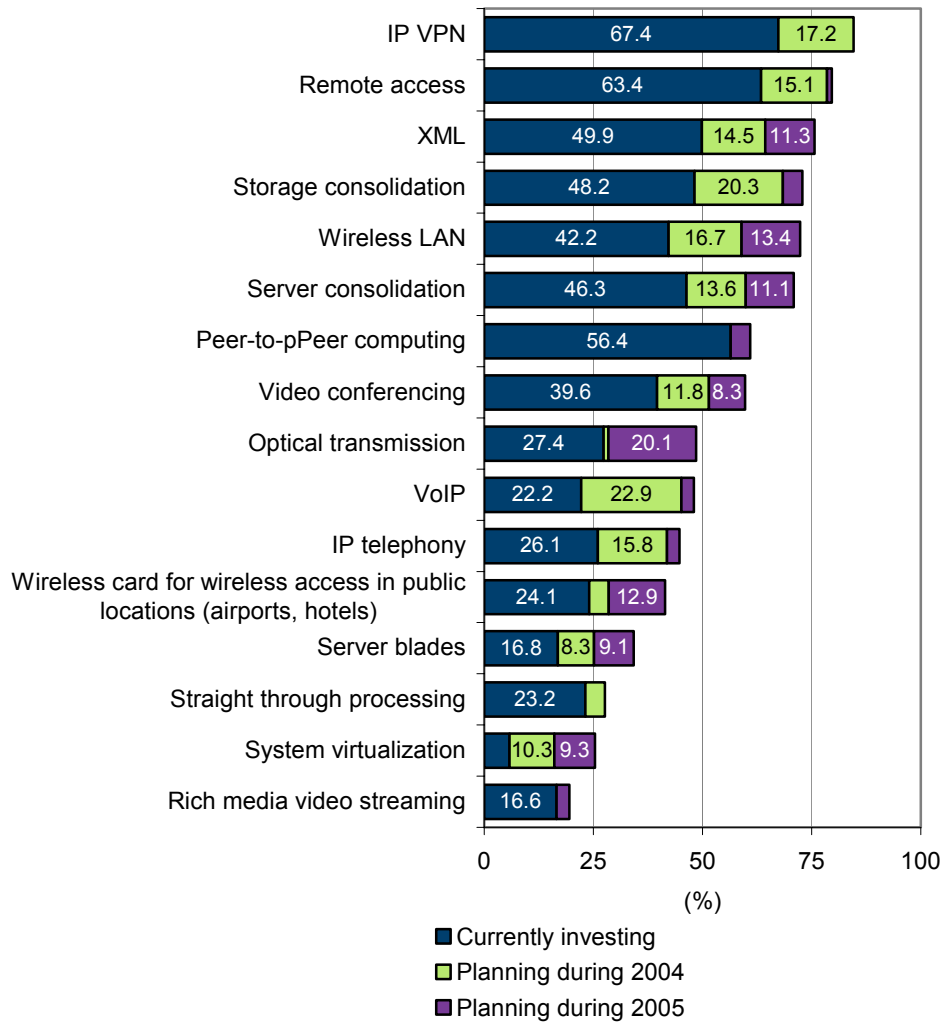
Note: Central government respondents = 17

Source: IDC, European Vertical Market Survey, 2003

**FIGURE 9**

**Western Europe, Local Government Sector, New Technologies Investment Plans**

*Please indicate which one of the following statements most accurately describes your organization's status regarding the following technologies*



Note: Local government respondents = 28

Source: IDC, European Vertical Market Survey, 2003

## ESSENTIAL GUIDANCE

ERP, databases, collaborative tools, and industry-specific technologies will provide a critical contribution to the modernization of the government sector. In addition to those technologies, however, Western European public administrations are keen to experiment with cutting-edge solutions, such as:

- Web sites
- Web services
- Other new technologies

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### Web Sites

Web sites are at the core of egovernment plans to increase the responsiveness and accessibility of citizen services.

IT vendors can harness the opportunity by providing solutions that help public administrations to grow the online transaction functionalities. Most Western European governments have put information online, but many still need to invest in online payment and ordering and to integrate Internet self-service with call centers to enable real multimedia platforms.

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### Web Services

Web services architectures are expected to be critical components of integrated egovernment frameworks. The modernization of delivery channels through citizen portals and call centers is not sufficient to enhance the effectiveness of operations. The long-term government modernization strategy must envisage the integration of the front and back end and among agencies.

To speed up development of new solutions and integrate packaged software with legacy custom technologies existing in many government agencies, vendors need to master Web service technologies to offer flexible application development and deployment tools.

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### Other New Technologies

Web services integrate data and applications, but governments need also security and flexibility of access to those applications.

Hardware, software, and IT service vendors have a variety of solutions that they can provide to satisfy these needs. Both central and local governments are particularly keen on remote access, IP VPN, and wireless LANs.

Also, government agencies want to leverage on existing hardware by consolidating storage and servers. This raises opportunities for IT service vendors that have the competencies to optimize existing infrastructures, by driving out as much cost as possible, while not reducing the capability to access, store, and distribute data.

## LEARN MORE

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### Related Research

- ☒ *Western Europe, Healthcare Sector IT Spending, Forecast, 2003–2007* (IDC #PP55K, November 2003)
- ☒ *Western Europe, Education Sector IT Spending, Forecast, 2003–2007* (IDC #PP54K, December 2003)
- ☒ *Western Europe, Government Sector IT Spending, Forecast, 2003–2007* (IDC #PP56K, November 2003)
- ☒ *Western European Public Sector, Top IT Vendors, Competitive Assessment, 2003* (IDC #PP11K, November 2003)
- ☒ *European eGovernment Services — Country Benchmarking and Market Forecast, 2002–2007* (IDC #SN09K, November 2003)
- ☒ *European Government Sector Pulse, January-March 2004* (IDC #PP51L, April 2004)
- ☒ *European Healthcare and Education Sectors' Pulse, January-March 2004* (IDC #MS51L, April 2004)
- ☒ *Western Europe, Government Sector, IT Solutions Adoption and Investments: An IDC Survey* (IDC #PP01L, January 2004)
- ☒ *Western Europe, Education Sector, IT Solutions Adoption and Investments: An IDC Survey* (IDC #MS01L, March 2004)
- ☒ *Western Europe, Healthcare Sector, IT Solutions Adoption and Investments: An IDC Survey* (IDC #MS02L, March 2004)
- ☒ *Western Europe, Government Sector, IS Budget, Channel Selection and Customer Satisfaction: An IDC Survey* (IDC #PP02L, April 2004)
- ☒ *Western Europe, Healthcare Sector, IS Budget, Channel Selection and Customer Satisfaction: An IDC Survey* (IDC #MS03L, April 2004)
- ☒ *Western Europe, Education Sector, IS Budget, Channel Selection and Customer Satisfaction: An IDC Survey* (IDC #MS04L, April 2004)
- ☒ *Western Europe, Government Sector, Server and Storage Infrastructure, Usage and Adoption Plans: An IDC Survey* (IDC #PP03L, May 2004)
- ☒ *Western Europe, Healthcare Sector, Server and Storage Infrastructure, Usage and Adoption Plans: An IDC Survey* (IDC #MS06L, May 2004)
- ☒ *Western Europe, Education Sector, Server and Storage Infrastructure, Usage and Adoption Plans: An IDC Survey* (IDC #MS07L, May 2004)

- ☒ *Western Europe, Healthcare Sector IT spending, Forecast 2003-2008* (IDC #MS05L, May 2004)
- ☒ *Western Europe, Government Sector IT spending, Forecast 2003-2008* (IDC #PP04L, May 2004)
- ☒ *Western Europe, Education Sector IT spending, Forecast 2003-2008* (IDC #MS08L, June 2004)

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