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NEWS ANALYSIS

**June '09 federal labor data: Fewer bright spots for IT workers as 467,000 more jobs disappear,
but signs of encouragement persist**

Vero Beach, FL, July 8, 2009. Although U.S. employment numbers for June 2009, released last Friday by the Department of Labor/Bureau of Labor Statistics, showed fewer bright spots for IT professionals compared to the month prior, there were still some signs of encouragement for tech workers.

“National unemployment reached 9.5 percent with another 467,000 jobs lost in June, and unfortunately some of those were technology professionals once again,” notes David Foote, CEO of IT workforce analyst firm Foote Partners. “But it’s important to note that fewer jobs were lost in the bellwether IT job segments, 1800 fewer than in May to be exact. One segment, Data Processing/Hosting/Related Services, actually added 600 jobs last month following four consecutive months of losses. Though a surprise, it supports continued evidence of counter trending in IT employment that we’ve seen every month since the Wall Street meltdown last October.”

Not so lucky were tech workers in the Management/Technical Consulting Services job segment, which lost 1,100 jobs last month after two consecutive gains in April and May totaling 2,300 jobs, or the Communications Equipment segment that dropped 2,100 jobs in June, up from 600 lost in the month prior.

“But the Computer and Peripheral Equipment segment lost 900 fewer jobs this time, not exactly good news but certainly some encouragement,” concludes Foote.

“But I think the more positive story, and also the better indicator of overall performance in the IT workforce, is instead demand trends for specific categories of IT skills. The recession has had minimal impact on demand for IT skills in the areas such as architecture, business process, security, communications, e-commerce, and several ERP and infrastructure specializations. That was especially evident in the most recent Foote Partners IT Skills HOT LISTS that evaluate and predict demand for IT skills from numerous data sources.

“Once again, job security depends more on the particular combinations of skills brought to the job, both hard and ‘soft’, not necessarily the job or job title. Decisions on thinning the workforce don’t begin with job titles or functions, but instead identifying those workers whose skills are either not strategic or do not match up well with the work that needs to get done. So, for example, some applications developers or storage administrators are more important than others even though their job titles may be identical. Clearly, the survivors are the shrewd IT professionals who have always been the most aggressive and alert in directing their career development, managing to always be out front of the demand for skills. They may not even be the hardest workers, but they are certainly the most effective. And in a sense the most loyal to their employers if not also their profession.”

For more information on *Foote Partners HOT LISTS*, see page 4.

Department of Labor/Bureau of Labor Statistics (through June 2009)

JOB SITUATION TRENDS – IT PROFESSIONALS

	2008			2009					
	October	November	December	January	February	March	April	May	June
Total Jobs Lost since 12/07		2.7 million		3.6 million		5.1 million	5.7 million	7 million	7.2 million
Nonfarm job loss (month)	240,000	533,000	524,000	598,000	651,000	663,000	539,000	345,000	467,000
National unemployment rate	6.5%	6.8%	7.2%	7.6%	8.1%	8.5%	8.9%	9.4%	9.5%
	Job Gains/Losses								
Computer/Electronic Products	-4,200	-7,000	-8,200	-8,800	-13,100	-5,300	-11,700	-14,400	-16,100
<i>Segment: Computer/Peripheral Equipment</i>	200	-1,200	-700	700	-3,100	-1,500	-2,900	-3,200	-2,300
<i>Segment: Communications Equipment</i>	100	-600	-1,700	-500	-200	600	200	-600	-2,100
Professional/Technical Services	12,500	-17,400	-18,100	-28,600	-36,700	-31,300	-17,100	-18,800	-40,400
<i>Segment: Management/Technical Consulting Services</i>	300	1,400	-1,800	11,000	-4,800	-6,100	1,600	700	-1,100
<i>Segment: Computer Systems Design/Related Services</i>	5,500	2,700	-2,900	-3,500	-300	-3,900	-1,400	-2,800	-2,700
Information	0	-19,000	-20,000	-21,000	-15,000	-10,000	-17,000	-24,000	-21,000
<i>Segment: Data Processing/Hosting/Related Services</i>	-100	-1,400	500	200	-2,000	-200	-900	-3500	600

Key: **Job losses in red**
 Job gains in green

Foote Partners HOT LIST

Why the Hot List? The concept of what is “hot” has become widely celebrated in the popular media. There has been no greater example of this than IT media outlets reporting of quarterly findings from Foote Partners’ long-running *IT Skills and Certifications Pay Index™ (ITSCPI)*, which tracks pay and demand for 382 IT skills and certifications. But here is the dilemma: Our analysts too often disagree with so-called “hot lists” of skills that IT publications and media assemble from periodic Foote Partners news releases and attribute directly to Foote Partners research. The problem is that these are news releases distributed to editors and reporters when ITSCPI survey updates occur that contain very abbreviated research views of our ITSCPI findings. They represent only a small portion of what we report to our customers.

The truth is that it takes much more information, research, and analysis to declare a skill or certification “hot” and to then to rank that skill against others. Analyzing pay performance isn’t enough.

The IT skills market intelligence Foote Partners provides to its customers is derived from a variety of rigorous research tools and analytical processes developed expressly for that purpose by our firm. They also include IT spending surveys; empirical findings from interviews with the executives and managers at our more than 1,900 research partners; analyses of vendors and product strategies; assumptions concerning technology evolution; economic indicators; cyclical patterns observed from historical market behavior; and third party research such as the monthly Department of Labor employment reports and the Consumer Price Index.

“To resolve this dilemma, we will now issue our own monthly *Foote Partners Hot Lists*,” announces Foote. “We’ll tell you which skills and certifications are truly “hot” right at this moment, which may be on the cusp of “hot”, and why. We’ll also publish **Hot Lists** that prioritize and rank technology and IT services in categories such as infrastructure, management, ‘customer-facing’, business, and applications, to name a few.

Hot List definition and methodology. In determining what skills are eligible for our **Hot List**, we first look for skills that have recorded the most growth in value over the past 3 to 6 months. Among those, we isolate the skills currently earning the highest premium pay. Next we analyze our most recent survey of IT spending on technologies and services, focusing on the spending deltas between prior year actual spending and current year

estimated budget. As we begin formulating our rankings, we look for factors that may be driving or contributing to interest and demand for a specific skill or group of skills. We conduct a series of interviews within our research partner populations to inquire about their skill priorities and acquisition strategies now and in the near future. We also test for possible variations by industry, size of enterprise, geography, and other elements.

On the follow page are our current ***Foote Partners Hot Lists*** for certified and noncertified IT skills. In compiling these lists we emphasized Q2 2009 data findings and our projections for Q3 2009.

Foote Partners Hot List

May 2009

Items are displayed in descending order of “hotness”. Generally speaking, for any single item, ranking is somewhat arbitrary within ± 1 positions of that item.

IT SKILLS (Noncertified)

1. Java EE,SE,ME
2. Linux
3. Virtualization (all)
4. Microsoft .NET
5. NetWeaver
6. Business process management/modeling/improvement
7. Unified communications/messaging
8. Security*
9. SAN (storage area networking)
10. Project management
11. SAP HCM (SAP HR)
12. SAP FI (Financial Accounting)
13. SAP CO (Controlling)
14. SAP PP (Production Planning)
15. SAP LO (Logistics General)
16. Business Objects
17. SAP PLM (Product Lifecycle Management)
18. ERP (various)
19. Microsoft SQL Server
20. Apache HTTP web server
21. Documentum
22. MySQL
23. PHP
24. ITIL
25. SAP KW (Knowledge Warehouse)
26. SAP LE (Logistics Execution System)
27. Database management

* IDS/IPS, forensics, identity/access mgt, compliance, firewalls, threat/vulnerability assessment and mgt.

IT CERTIFICATIONS

1. HP/Accredited Systems Engineer
2. GIAC Certified Incident Handler
3. EMC Proven Professional Technology Architect – Expert
4. Citrix Certified Integration Architect
5. HP/Master Accredited Systems Engineer
6. Cisco Certified Security Professional
7. Check Point Certified Master Architect
8. GIAC Certified Forensics Analyst
9. GIAC Certified Intrusion Analyst
10. EMC Proven Professional Implementation Engineer – Expert
11. GIAC Certified Incident Manager
12. IBM Certified Infrastructure Systems Architect
13. IBM Certified Specialist - Storage Networking Solutions, Version 2
14. HP/Accredited Integration Specialist
15. Brocade Certified Fabric Designer
16. Cisco IP Telephony Design Specialist
17. Cisco Certified Design Professional
18. Microsoft Certified Solution Developer
19. Microsoft Certified Trainer
20. EMC Proven Professional Technology Architect - Specialist
21. CWNP/Planet3 Certified Wireless Security Professional
22. Microsoft Certified Architect (MCA)
23. Security Certified Network Architect
24. SNIA Certified Storage Architect
25. SNIA Certified Storage Networking Expert
26. Citrix Certified Enterprise Administrator

ABOUT FOOTE PARTNERS

[Foote Partners LLC](#) is a Vero Beach, Florida based management consultancy and independent IT research firm founded in 1997 that provides pragmatic and forward-thinking advice about managing the modern IT professional workforce. Comprised of former Gartner, McKinsey & Company, Towers Perrin, and Wm. M. Mercer analysts and consultants, and former corporate HR, IT, and business executives, Foote Partners has been a thought leader and trusted advisor to more than 1,400 employers seeking improvements in managing IT's impact on their businesses and customers.

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Cities and Metropolitan Areas Surveyed (2009)

Foote Partners publishes compensation survey data in the following cities and metro areas for all positions and skills in its surveys. In addition, we are currently surveying other US and Canadian cities for future inclusion once we capture enough data for meet our rigid requirements for labor market reporting and achieve our tough survey validity and reliability standards.

Canadian Cities

Calgary, ALTA	London, ONT	Quebec, QUE	Toronto, ONT
Edmonton, ALTA	Mississauga, ONT	Regina, SASK	Vancouver, BC
Halifax, NS	Montreal, QUE	Saskatoon, SASK	Windsor, ONT
Hamilton, ONT	Oshawa, ONT	St. Catherines, ONT	Winnipeg, MAN
Kitchner, ONT	Ottawa, ONT		

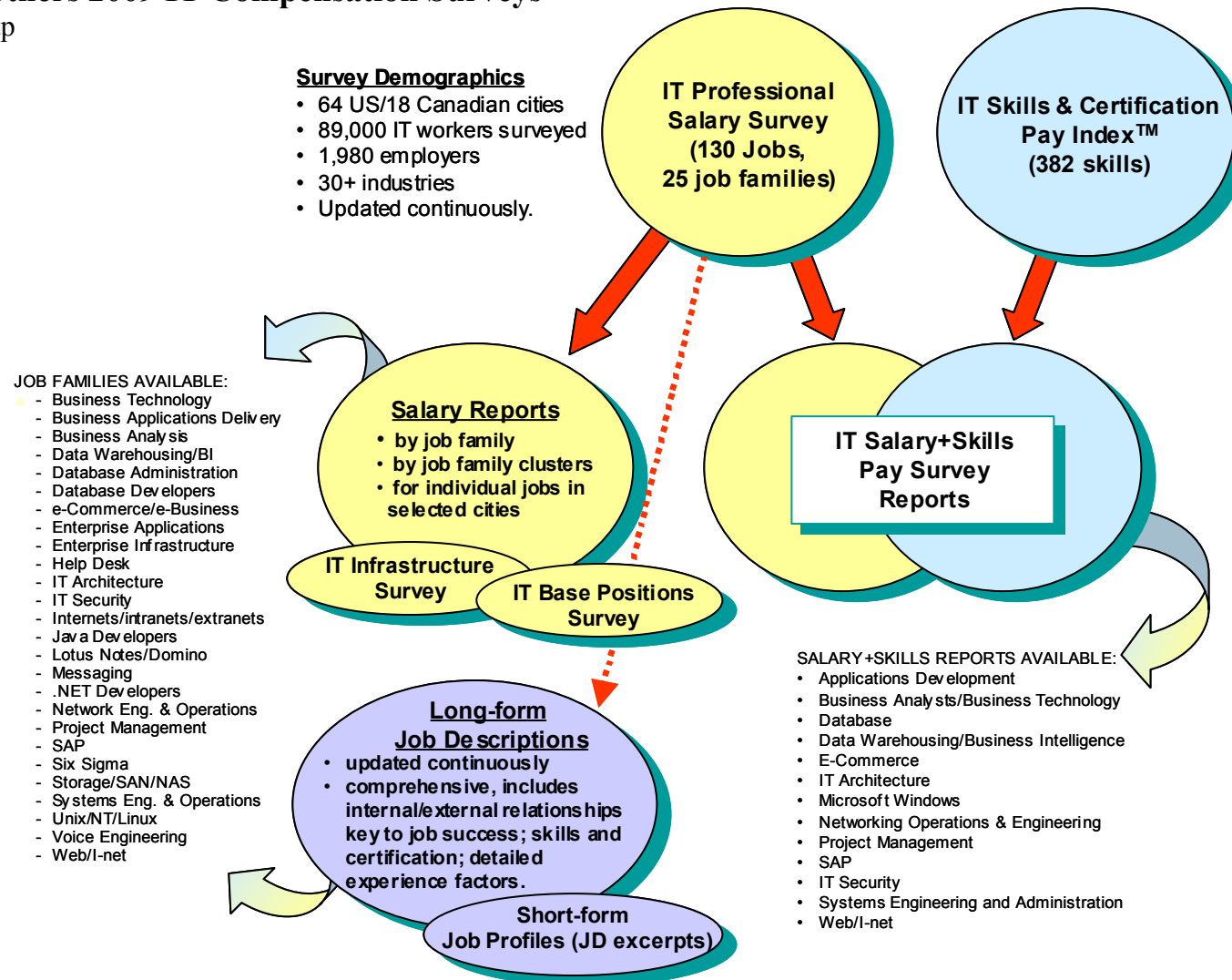
Tier 1 Cities (U.S.)

Atlanta, GA	Houston, TX	New York City, NY	San Jose, CA
Boston, MA	Los Angeles/Orange Cty, CA	Philadelphia/So. NJ	Seattle, WA
Chicago, IL	Miami, FL	Phoenix, AZ	St. Louis, MO
Dallas, TX	Minneapolis, MN	San Diego, CA	Washington, DC
Detroit, MI	New Jersey/Northern	San Francisco, CA	Westchester County, NY/ Lower Fairfield Cty, CT

Tier 2 Cities (U.S.)

Albuquerque/Santa Fe, NM	Greensboro/Winston- Salem, NC	Nashville, TN	Providence, RI
Austin, TX	Greenville/Spartanburg /Anderson, SC	New Orleans	Raleigh/Durham, NC
Baltimore, MD	Hartford, CT	Norfolk/Virginia Beach/ Newport News, VA	Richmond, VA
Birmingham, AL	Indianapolis/Ft Wayne	Oakland/Walnut Creek/ Concord CA	Sacramento, CA
Charlotte, NC	Kansas City, MO	Oklahoma City, OK	Salt Lake City, UT
Cincinnati, OH	Las Vegas, NV	Omaha, NE	San Antonio, TX
Cleveland/Akron, OH	Long Island, NY	Orlando, FL	Tampa, FL
Columbus, OH	Louisville, KY	Peoria, IL	Tulsa, OK
Colorado Springs, CO	Madison, WI	Pittsburgh, PA	Upper Fairfield County/ New Haven, CT
Dayton, OH	Memphis, TN	Portland, OR	
Denver, CO	Milwaukee, WI	Princeton/So. NJ	
Des Moines, IA			
Grand Rapids, MI			

Foote Partners 2009 IT Compensation Surveys
Product Map



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