

IT Analysis – Sustained Disruption

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Every so often something comes along that changes the established order. The most oft quoted examples in the technology marketplace are the internet, HTML, the ecommerce model, open source, and distributed computing. Some of them we see coming a mile off; the shift from the use of the internet as a research collaboration tool to one of transactional commerce was fairly obvious once HTML took the geek out of the game of browse and seek.

Others don't seem as likely until the wave breaks and the slowly gathering tsunami washes away the existing structure and floods as far as the eye can see. Open source is a good example—many a market strategist at established vendors couldn't get their heads around the concept of an IT department actually trusting their fate to a product that was created by an often faceless set of far flung and unbranded developers, not to mention that they didn't believe those developers could or would work together in the first place. Of course the building momentum of a pending market disruption, nor its potential scale is ever invisible if you are close enough to it and have your eyes, ears and mind open.

Sustainability is going to change everything.

Sustainability efforts are going to be the big disruptor because it touches everything that businesses do and how they do it. Here is a by no means exhaustive list of what gets influenced to a significant degree:

- supply chains: where things are built and how they are assembled
- component choice, design, material inclusion and manufacturing method
- energy production and distribution techniques
- energy consumption availability and management
- go to market and sales models (for example the massive decline in centralised sales forces travelling extensively to clients throughout the sales cycle)

- a move from centralised offices back to distributed office parks; home working and remote working
- legislation and performance standards—ISO14064 and PAS2050 aside—we "ain't seen nothing yet" but it is almost certain that emissions will become a strictly enforced area in the coming years
- accounting, reporting and transparency in emissions footprints
- as "contract and converge" plays out a restructuring of the economic justifications that currently support services offshoring will occur.

IT vendors, being businesses themselves, are of course affected by those factors as far as how they go to market. "Eating your own dog food" has long been a crude but often quoted proof point amongst vendors that they not only talk the talk, but eat their own words too. In the coming decade companies will minutely examine the performance of their suppliers as far as sustainability goes, with the imbedded carbon load in goods construction and services delivery being of acute concern. Standards like ISO14064 and the soon to be finalised PAS2050 will codify performance and provide performance transparency. Selling sustainability will be replaced by sustainable selling and all those years of greenwashing will be rued as years wasted.

The technology vendors develop and bring to market will also be directly influenced in various ways. IT will continue to do what IT has always done which is to serve the business, though it will first go through a period of squeezing out energy usage inefficiencies. As a phase, a focus on efficiency will likely peak in the next few years—lets say that by 2011 at the latest it'll be something that is done as a matter of course and will no longer be a strong market differentiator for products or services. IT will be an enabler of travel avoidance. IT will be the engine of emissions accountancy just as it is the engine of financial accountancy; more interestingly it will likely be the data gatherer for emissions accountancy. In this latter regard the lines will blur between IT and other domains:

* is it IT or facilities management if IT systems are monitoring and managing smart power meters, smart bidirectional power grids and micro generation equipment?

* is it IT or facilities management if IT systems are monitoring and managing building heating and cooling and controlling heat capture and re-use systems?

* is it an IT issue if companies must adhere to very exacting emissions reporting requirements? This question makes more sense if you ask "How much money was spent on IT projects as a result of legislation designed to ensure accuracy and transparency in financial reporting?" otherwise expressed as "How much money flowed into IT budgets due to SOX?"

It is by no means certain that the established technology industry players have the answers, the means of execution, nor the depth of understanding to be the winners in the sustainability centred marketplace that lies ahead. Though if history is a guide they may well eventually buy a way into it. Meanwhile many of tomorrow's industry winners are waiting for their moment in the spotlight. If you, as a vendor, believe you have the answers, the expertise, and the capability to be tomorrow's winner we at Quocirca want to hear from you. Expect to be asked some tough questions—it takes some serious effort to become a winner of the future.

About Quocirca

Quocirca is a primary research and analysis company specialising in the business impact of information technology and communications (ITC). With world-wide, native language reach, Quocirca provides in-depth insights into the views of buyers and influencers in large, mid-sized and small organisations. Its analyst team is made up of real-world practitioners with first hand experience of ITC delivery who continuously research and track the industry and its real usage in the markets.

Through researching perceptions, Quocirca uncovers the real hurdles to technology adoption – the personal and political aspects of an organisation's environment and the pressures of the need for demonstrable business value in any implementation. This capability to uncover and report back on the end-user perceptions in the market enables Quocirca to advise on the realities of technology adoption, not the promises.

Quocirca research is always pragmatic, business orientated and conducted in the context of the bigger picture. ITC has the ability to transform businesses and the processes that drive them, but often fails to do so. Quocirca's mission is to help organisations improve their success rate in process enablement through better levels of understanding and the adoption of the correct technologies at the correct time.

Quocirca has a pro-active primary research programme, regularly surveying users, purchasers and resellers of ITC products and services on emerging, evolving and maturing technologies. Over time, Quocirca has built a picture of long term investment trends, providing invaluable information for the whole of the ITC community.

Quocirca works with global and local providers of ITC products and services to help them deliver on the promise that ITC holds for business. Quocirca's clients include Oracle, Microsoft, IBM, Dell, T-Mobile, Vodafone, EMC, Symantec and Cisco, along with other large and medium sized vendors, service providers and more specialist firms.

Details of Quocirca's work and the services it offers can be found at
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