

Sustainable Network Infrastructure



Introduction

Sustainability is an increasingly critical consideration for any organisation, across many areas – it can provide a path to saving costs, increasing employee morale and to winning new business. Most importantly, it contributes to the collective global effort to reduce carbon emissions for a more sustainable planet. Organisations' network infrastructure can be one area where taking a sustainable approach can contribute to the journey on this path. In today's world, networking is a fundamental, non-negotiable component of most organisations as they undergo digital transformation – it underpins citizen-facing government services, healthcare, retail, education, transport, entertainment, communications. In other words, everyone uses network-driven digital services in their daily lives in the workplace and at home.

But do organisations have enough knowledge and understanding of sustainability issues, as related to network infrastructure, to take full advantage of the opportunities available? This report examines the status of sustainable networking perspectives in organisations across EMEA.

Key findings

83%

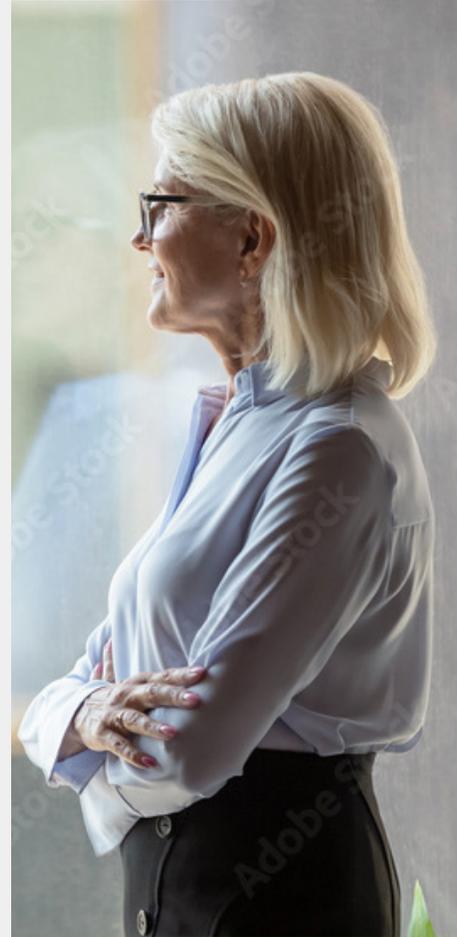
of IT decision makers (ITDMs) surveyed have already implemented, or are in the process of implementing, a sustainable network infrastructure policy

85%

of all respondents believe that sustainable networking is important in a work context

86%

want to see more positive action on IT/networking sustainability from their organisation over the next two-five years



Current status of sustainable network infrastructures

Sustainable networking plans are on organisations' radar, but actual progress can vary greatly depending upon country and sector.

The signs that organisations are taking the opportunity to implement sustainable networking practices and plans are good. More than eight in ten (83%) ITDMs say that their organisation has implemented, or is implementing, a sustainable network infrastructure policy. However only just over one third (34%) of ITDMs say that their organisation has already implemented this. Even though a further 61% say that they are in the process of doing so, or will do so in the next year, this demonstrates that sustainable networking is still relatively unlikely to be currently active in most organisations.

Do organisations have sustainable network infrastructure policies in place?

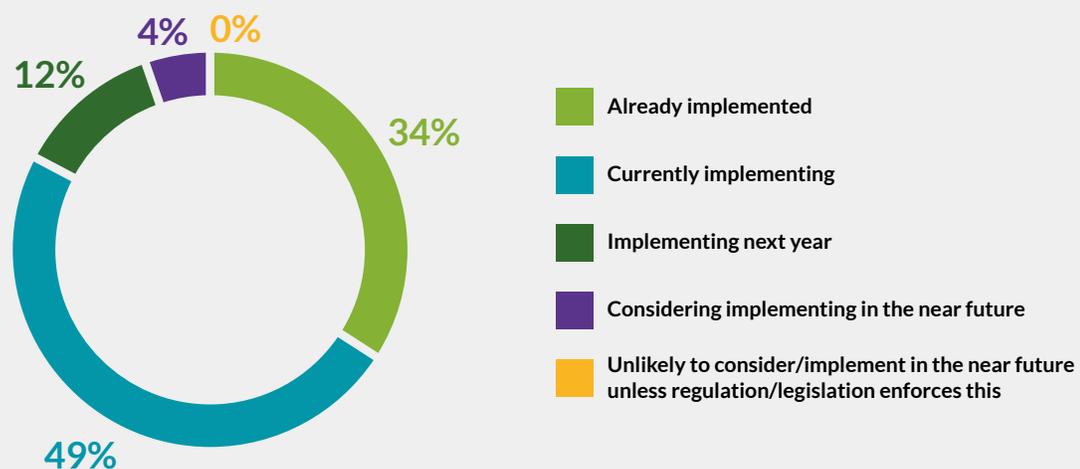


Figure 1: To what extent has your organisation either considered or implemented a sustainable network infrastructure policy, focusing on significant power consumption reduction capabilities? [650], only asked of ITDMs

There is notable variation too when comparing the implementation rates of countries, sectors and organisation sizes: ITDMs in the UK are least likely to report that their organisation has already implemented a policy (23%), whereas ITDMs in Germany are most likely (46%). Significant variation also exists when comparing industry sectors: just 21% of ITDMs in the manufacturing and production sector throughout EMEA say that they have implemented a sustainable networking infrastructure policy, compared to 53% in the healthcare sector. Similarly, smaller organisations of fewer than 3,000 employees are less likely to have implemented a policy (27%) compared to larger organisations with 3,000 employees or more (44%).

This demonstrates that sustainable network infrastructure implementation is not proceeding at a consistent pace across any key demographics. Implementation therefore is likely to exist where there are factors specific to that organisation, that are driving implementation forward. For example, the UK's Decarbonisation and Economic Strategy Bill is currently in its early stages, but as time goes on and the bill progresses, ITDMs in the UK may find the need for a sustainable network infrastructure becomes more urgent and more prescriptive to be compliant.

Views of employees

IT teams and employees throughout organisations support the aims and objectives of sustainable networking, but more needs to be done by organisations to show that they are committed to implementation.

How is sustainable networking regarded by employees within organisations? ITDMs (87%) and office workers (83%) have broadly similar levels of agreement regarding the importance of this, with 85% overall saying sustainable networking is important in a work context. This indicates that IT teams and the wider organisation are likely to be aligned when it comes to the motivations and benefits of sustainable networking, which should make implementation easier for such organisations.

This alignment generally extends to organisations of different sizes and across different sectors – but some variation does exist between different countries across EMEA.

“I think sustainable networking is extremely important in a work context”

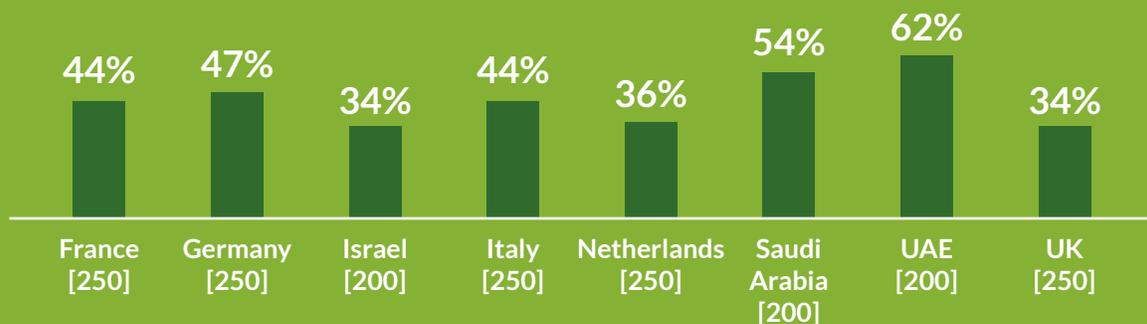


Figure 2: How important do you think sustainable networking (significant power consumption reduction capabilities) is in a work context, in terms of making a significant contribution to effective, ongoing climate change measures? [base numbers in chart], split by country

Respondents in the Middle East (Saudi Arabia and UAE) are notably more likely than other surveyed countries to regard sustainable networking as extremely important (although this increased likelihood has not directly resulted in a higher average level of implementation in these countries). This shows that organisations in some countries may have more work to do when it comes to communicating the significance of sustainable networking throughout the business.

Despite ITDMs and office workers being broadly aligned when it comes to the importance of sustainable networks, organisations’ leadership teams should do more to clearly understand the issues (or alternatively, make their existing understanding clearer by broadcasting their knowledge and strategies more openly to the organisation). This is particularly the case when it comes to office workers – only just under one third (32%) say that they believe their organisation’s leadership has a thorough understanding of the technology choices they make, in the context of sustainability (with 17% saying they believe that their leadership has poor understanding or no understanding at all).

Perceptions of organisational leaderships' understanding when it comes to the impact of technology choices on sustainability

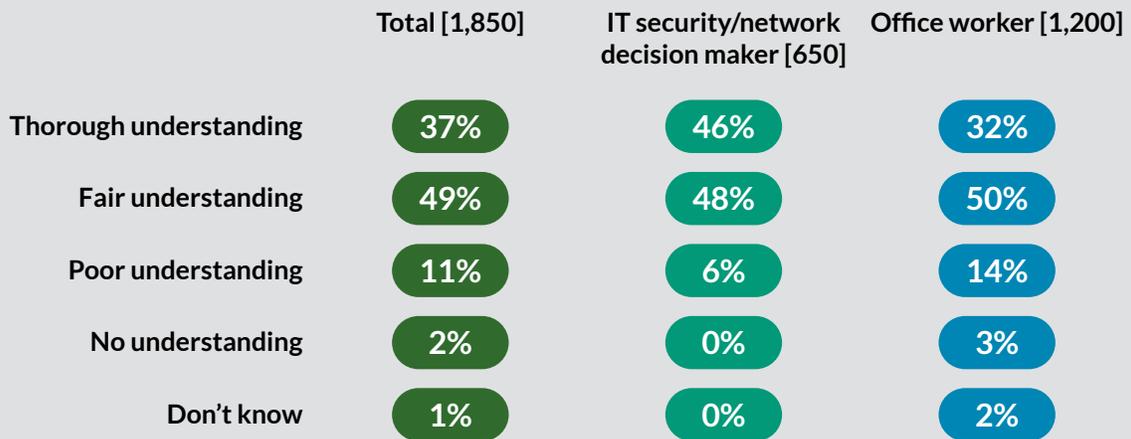


Figure 3: What depth of understanding do you think your organisation's leadership has of the impact of the technology choices it makes, in the context of sustainability? [base sizes in chart], split by respondent type

In contrast, nearly half (46%) of ITDMs believe leadership has a thorough understanding, showing that it is more likely for there to be a communication disconnect around this issue between leadership and the wider organisation than there is between leadership and IT. But even for ITDMs, there is room for doubt when it comes to leadership for the majority – only 36% regard their organisation's leadership as being fully committed to digital transformation as a strategic direction, showing that leadership may be a weak link in many organisations across a wide technology sphere.

And to support the findings referenced earlier around the Middle East, respondents in this region are most likely to believe that their organisation's leadership has a thorough understanding of the relationship between technology and sustainability issues (UAE = 57%, Saudi Arabia = 46%). This demonstrates again that levels of communication between leadership and the rest of the business, on issues around sustainability, are likely to be somewhat higher (although by no means perfect) in organisations in this region.

86% of respondents want to see more positive action from their organisation with regard to IT/networking sustainability in the next two-five years

But a view held consistently across all key demographics (regardless of role, country, sector or organisation size) is that respondents want to see more positive action from their organisation with regard to IT/networking sustainability in the next two-five years – 86% agree with this. This shows that despite many organisations being in the early stages of implementation, and communication requiring notable improvement, employees want to see continued evidence of progress in their organisation's sustainable network plans.

But this is not the only pressure that organisations and IT teams will face in the near future. Four in ten (40%) respondents agree that their organisation is not recruiting with the tech roles of the future in mind (rising to 48% for ITDMs). And more than eight in ten (86%) ITDMs acknowledge that the IT department will need to recruit different skillsets in the next two-five years, because of digital transformation. If organisations are struggling to recruit the necessary skills to maximise their use of future technology, then achieving a sustainable network infrastructure may become a lesser priority. But if future legislation forces the issue around sustainable networking infrastructures, the result may be that some organisations find themselves in a situation where they are conflicted between necessity and available skillsets on the recruitment market.

Conclusion

The IT department and general employees are likely to be united in their view that sustainable networking is important and valuable to their organisation. Such organisation-wide support for a technological issue should not be assumed, and so it is encouraging to see it exists in this case.

But organisations across EMEA are likely to need to step up, whether it is a case of following through on promises and implementing a sustainable network infrastructure, or improving clarity and consistency of communications from leadership on the issue. When it comes to the expectations placed on an organisation to implement plans for sustainable networking, EMEA employees and IT teams appear to be setting the bar very high.

Methodology

Juniper Networks commissioned independent market research agency Vanson Bourne to conduct the research upon which this executive summary is based. 1,850 respondents, representing IT (650) and office workers/knowledge workers (1,200), from organisations across the EMEA region (France, Germany, Israel, Italy, Kingdom of Saudi Arabia, Netherlands, UAE, UK), were surveyed from a range of private and public sector organisations (sized between 500 and 3,000+ employees).

All interviews were conducted using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate.

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About Vanson Bourne

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