

Going green: Sustainable growth strategies*

Technology executive connections
Volume 5



The survey

The quantitative findings presented in this report are based on a survey conducted by the Economist Intelligence Unit (EIU) in late 2007. The survey garnered 148 responses from senior executives based in five principal regions: 28% Asia; 31% Europe; 35% North America; 5% the Middle East and Africa and 1% Latin America.

The interviews

In addition, over 20 executives were interviewed for this report: some on the record, some willing to name their company but not attribute their quotes, and others insisting on complete anonymity.

On the record:

- Rob Bernard, Chief Environmental Strategist, Microsoft
- Holly Elwood, Environmental Protection Specialist, United States Environmental Protection Agency
- Tom Georgens, Executive Vice President of Product Operations, Network Appliance, Inc.
- Scott Gnau, Chief Development Officer, Teradata
- Rick Hind, Legislative Director, Toxics Campaign, Greenpeace International
- Lawrence Lamers, Member of Technical Staff, Office of the CTO, VMware and Director, The Green Grid
- Wes Muir, Director of Communications, Waste Management, Inc.
- Mark Small, Vice President, Health, Safety and Environment, Sony Electronics
- Kim Stevenson, Vice President, Communications, Media and Entertainment, EDS and Board of Directors Member, Climate Savers Computing Initiative
- Roger Tiple, Senior Technologist, HP and Director, The Green Grid
- Scott Wicker, Chief Marketing Officer, ZINK Imaging
- Paul Zeven, Chief Executive Officer, Philips Electronics North America Corporation

About PricewaterhouseCoopers

The firms of the PricewaterhouseCoopers global network (www.pwc.com) provide industry-focused assurance, tax and advisory services to build public trust and enhance value for clients and their stakeholders. More than 146,000 people in 150 countries across our network share their thinking, experience and solutions to develop fresh perspectives and practical advice.

PwC works with technology companies around the world to help them fulfill the promise of their great ideas. We are the trusted advisor and auditor to the majority of the Financial Times technology companies.

To help technology companies manage today's environmental challenges and make the most of environmental opportunities, PwC's robust sustainability practice concentrates on green performance improvement processes and sustainability risk management and reporting.

We have made a major commitment to train our people in industry-specific issues so that we can deliver services with a global perspective, local implementation, in-depth experience and a forward-thinking approach.

There is an ever-present state of change and evolution in the technology industries. PwC's ability to add value is a constant.

February 2008



Dear Executive,

Welcome to PricewaterhouseCoopers' fifth volume of Technology Executive Connections, a series of survey reports designed to help executives in technology industries better explore, understand and share ideas about today's pressing business and strategic issues.

Our unique combination of a broad, online, worldwide survey of senior executives and in-depth one-on-one interviews with industry leaders around the globe allows the Technology Executive Connections series to gauge the climate within the industry, gain insights into current views and opinions, and promote leading analysis of current issues.

In this, our fifth volume, we examine how the world's accelerating concern over climate change is affecting the technology industries as well as their plans to meet the growing clamour for environmentally friendly products and services. Not surprisingly, the majority of executives feel impelled to react to a rising demand for not only green products, but greener operations as well. And while protecting the environment is a fine objective, it's the promise of profits and an aversion to rising energy costs that drives the desire to change. To achieve both goals, the entire value chain—from suppliers to sales and marketing—needs to collaborate. Whether it's end-of-life issues for hardware manufacturers or excessive packaging of software, all segments of the technology industry are facing environmental challenges and opportunities.

To date, our Technology Executive Connections series has looked at such challenging issues as change management, the influence of convergence, talent retention and attraction, and maximising IP value. For soft or hard copies of these reports, please visit www.pwc.com/techconnect.

I hope this newest report provides interesting, thought-provoking reading to you and your colleagues and that it kindles discussions about environmental sustainability within your company. I welcome your thoughts on the issues we've addressed herein as well as your ideas for future topics to explore. Please feel free to contact us about this series via email at tech.connect@us.pwc.com.

Sincerely,

A handwritten signature in dark ink, appearing to read "Bill Cobourn". The signature is fluid and cursive, with a large, stylized "B" and "C".

Bill Cobourn
Partner and Global Technology Industry Leader
PricewaterhouseCoopers



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Consumers, governments, regulators and, increasingly, businesses are seeing green. A growing wave of global environmentalism is forcing technology companies to produce greener products through greener processes. To assist executives in understanding the new “environmental” environment, in late 2007 the EIU and PricewaterhouseCoopers conducted a global survey of 148 executives and supplemented the findings with over 20 in-depth executive interviews. Though the specific focus may vary, the research shows that technology companies are indeed implementing a variety of green-oriented strategies.

Les consommateurs, les États, les régulateurs, et, de plus en plus, les entreprises, pensent vert. Cette montée en puissance mondiale de l'écologie contraint les dirigeants des entreprises technologiques à fabriquer des produits plus propres grâce à des procédés moins polluants. Pour aider les cadres à comprendre le nouvel environnement écologique, l'Economist Intelligence Unit (EIU) et PricewaterhouseCoopers ont conduit fin 2007 une enquête mondiale auprès de 148 cadres supérieurs, dont les résultats ont été complétés par une vingtaine d'entretiens approfondis. Bien que les priorités varient, l'enquête montre toutefois que les entreprises technologiques mettent en œuvre un éventail de stratégies axées sur la préservation de l'environnement.

Konsumenten, Regierungen, Regulierungsbehörden und in steigendem Umfang auch Technologieunternehmen werden immer umweltbewusster. Denn das weltumspannende Umweltschutzbewusstsein zwingt auch Technologieunternehmen zur Herstellung umweltfreundlicherer Produkte durch umweltfreundlichere Prozesse. Um Entscheidungsträgern bei der erfolgreichen Bewältigung dieser neuen ökologischen Herausforderungen zu unterstützen, hat PricewaterhouseCoopers in Zusammenarbeit mit der Economist Intelligence Unit (EIU) eine weltweite Umfrage durchgeführt. Ende 2007 wurden dafür weltweit 148 Manager befragt und die Ergebnisse durch mehr als 20 vertiefende Interviews mit Führungskräften untermauert. Zwar unterscheidet sich der Fokus der Bestrebungen im Einzelnen. Unsere Umfrageergebnisse zeigen aber, dass Technologieunternehmen eine Vielzahl an Umweltschutzmaßnahmen eingeleitet haben.

政府、管理機構、消費者以及愈來愈多的企業都開始關注綠色環保的議題。一股全球環保主義的浪潮迫使科技公司採用環保的生產流程來製造綠色的產品。為協助企業管理人員瞭解當今的環保趨勢，經濟學人雜誌（EIU）和PricewaterhouseCoopers合作在2007年底對全球148位企業高階管理人員進行了一項問卷調查，並根據問卷調查的結果對超過20位高階管理人員進行了深入訪談。儘管企業各自關注的焦點不盡相同，調查結果顯示科技公司確實是在實施各種以環保為目的的策略。

