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Information and Organization

journal homepage: www.elsevier.com/locate/infoandorg



The sociology of a market analysis tool: How industry analysts sort vendors and organize markets

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ARTICLE INFO

Article history:

Received 31 January 2008

Received in revised form 9 January 2009

Accepted 29 January 2009

Keywords:

Industry analysts

Reputation

Performativity

Markets

Calculation

Community knowledge

Assessment

ABSTRACT

The information technology (IT) marketplace appears to be shaped by new kinds of specialist industry analysts that link technology supply and use through offering a commodified form of knowledge and advice. We focus on the work of one such organisation, the Gartner Group, and with how it produces a market analysis tool called the 'Magic Quadrant'. Widely circulated amongst the IT community, the device compares and sorts vendors according to a number of more or less intangible properties (such as vendor 'competence' and 'vision'). Given that potential adopters of IT systems are drawn to assess the reputation and likely behaviour of vendors, these tools play an important role in mediating choice during procurement. Our interest is in understanding how such objects are constructed as well as how they wield influence. We draw on the recent 'performativity' debate in Economic Sociology and the Sociology of Finance to show how Magic Quadrants are not simply describing but reshaping aspects of the IT arena. Importantly, in sketching this sociology of a market analysis tool, we also attend to the contested nature of the Magic Quadrant. Whilst Gartner attempt to establish this device as an 'impartial' and 'legitimate' arbiter of vendor performance, it is often viewed sceptically on the grounds that industry analysts are not always independent of the vendors they are assessing. Paradoxically these devices remain influential despite these sceptical assessments.

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1. Introduction

It is widely acknowledged that user organisations find it difficult to critically assess and evaluate large information technology (IT) solutions prior to purchase (Howcroft & Light, 2006; Pollock & Williams, 2007; Tingling & Parent, 2004). These substantial and often business-critical decisions about what may be major strategic investments (costing perhaps several millions of pounds) are carried out infrequently and businesses often lack the expertise and experience needed for effective decision making. One difficulty adopters face is they are assessing not just technical but intangible issues regarding the future performance of technology vendors (will they survive?), their behaviour (will they invest in the market in coming years?), as well as differences between technologies (Callon, Meadel, & Rabeharisoa, 2002). Making sense of these kinds of uncertainties is difficult and provokes confusion amongst adopters about how to proceed (Pollock & Williams, 2007; Tingling & Parent, 2004). Whereas in the past, adopters might resort to 'personal' or 'professional' networks for advice (Fincham et al., 1994; Swan & Newell, 1995) these informal avenues for knowledge exchange no longer seem to match up to the challenge of appraising today's technologies in terms of the growing range, escalating complexity and rapid evolution of products (Gluckler & Armbruster, 2003).

Today, however, it seems that specialist consultants and industry analysts are taking centre stage in the IT procurement market (Burks, 2006). The market is increasingly being shaped by IT research firms (such as the Gartner Group, Forrester Research, the Meta Group, the Giga Group, International Data Corporation) which link technology supply and use through offering commodified forms of knowledge and advice. Industry analysts and IT research firms appear to be successful in exploiting the uncertainties that exist in technology procurement through generating assessments of the relative location and standing of individual vendors and the efficacies of their products (Firth & Swanson, 2002; Firth & Swanson, 2005). These assessments, at first glance, appear to be effective in swaying procurement decisions and influencing vendor product strategies (Pollock & Williams, 2007). Moreover, demand for such advice is large and growing (with bigger firms spending annually up to £1 million on IT research (Konicki & Gilbert, 2001). Yet despite its growing importance, not much is known about this form of expertise, the characteristics of knowledge produced by industry analysts or the kind of influence they exert in shaping the IT marketplace.

We see the growth of these actors as a response to the deep uncertainties surrounding the procurement of organisational IT but also an opportunity created by these experts to enhance their own expansion (Wright, 2002). Thus, it might be argued that industry analysts fulfil a crucial role in shaping expectations about the development of technological fields and constituting markets for constantly changing supplier offerings (Firth & Swanson, 2005; Wang & Swanson, 2007). It is suggested here, and we will seek to demonstrate, that it is increasingly they who hold the ropes and set the rules of the game. In particular, we will show how they define the criteria by which vendors and offerings are judged through drawing up assessments of the relative performance and standing of these organisations.

In writing this paper, our overall purpose is to call for greater attention to be given to how the marketplace for complex IT is organised by these actors and, in particular, to the construction of market analysis tools. This is part of a broader analytical objective to move the social study of IT beyond its founding concerns and approaches which includes finding ways to link the strengths of currently dominant modes of study (detailed interactionist, ethnographic study) with broader forms of analysis to understand how wider arrays of actors shape markets and influence local action (see Kallinikos, 2004, Pollock & Williams, 2009). In this paper, we also show two specific aspects:

- (i) the process by which a group of industry analysts attempts to capture or, better still, 'produce' the character and status of vendors so that they can be ranked on a common plane;
- (ii) the often complicated way in which these organisations attempt to establish their research as an 'impartial' and 'legitimate' arbiter of vendor performance.

To do this we investigate the work of one of the leading IT research firms (the Gartner Group) and the construction of a tool called the 'Magic Quadrant' (MQ). This device is widely circulated amongst the IT community to compare and rank vendors according to a number of evaluative criteria, which

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