



IT accessibility for business advantage

A white paper commissioned by IBM

For many companies and government agencies, complying with regulations is currently the key driver for improving the accessibility of their Information Technology (IT) and telecommunications systems. However, organizations that take a proactive approach to accessibility can realize far greater benefits than simply achieving the status of regulatory compliance. This white paper highlights the key reasons why companies should consider investing more time and effort in this area, and examines the factors that are currently hindering market development.

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ABOUT DATAMONITOR

Datamonitor plc is a premium business information company specializing in industry analysis. We help our clients, 5000 of the world's leading companies, to address complex strategic issues.

Through our proprietary databases and wealth of expertise, we provide clients with unbiased expert analysis and in-depth forecasts for six industry sectors: Automotive, Consumer Markets, Energy, Financial Services, Healthcare and Technology.

Datamonitor maintains its headquarters in London and has regional offices in New York, Frankfurt, Sydney and Tokyo.

About this white paper

Datamonitor was commissioned by IBM to conduct an independent investigation into the state of market development of IT accessibility, with particular focus on investigating business-positive approaches that in many cases go beyond what is required under current regulations. Although IBM provided information to support this study, the research was conducted independently, including interviews with a number of industry experts who were selected by and interviewed solely by Datamonitor. All quotes used in this paper are from non-IBM sources.

This resulting paper represents Datamonitor's unbiased, vendor neutral viewpoint.

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EXECUTIVE SUMMARY

For many companies and government agencies, complying with regulations is currently the key reason for improving the accessibility of their IT systems. However, organizations that take a proactive approach to accessibility can realize far greater benefits than simply achieving the status of regulatory compliance. Improving accessibility can act to extend the effectiveness of technology for all individuals, and enable people of all abilities and ages to access and use IT services.

IT accessibility is all about ensuring that IT systems are available to everyone – regardless of ability or age'

– **Leading accessibility advocate**

Why should companies invest in accessibility?

- **Changing demographics are prompting companies to consider the benefits of making IT services more accessible.** With average employee ages set to increase over the next decade, businesses should act now in order to gain maximum advantage from their investments.
- While **regulations are forcing companies to improve the accessibility of their IT systems**, Datamonitor believes that this should be seen as an enabler for further development – significant benefits arise when accessibility is considered in a wider business context.
- **eGovernment initiatives driving public sector development** – in many countries, the Internet is becoming an increasingly important conduit for government information services, and the means of providing these services at lowest cost is a key issue for government organizations of all kinds. An accessible Web is therefore crucial in order to ensure equal opportunities for all citizens, including those with disabilities.

Boosting the effectiveness of accessibility-related solutions

- **Companies that fully embrace the opportunities offered by accessibility will reap significant business benefits** – being proactive and considering accessibility in the larger context of overall IT architecture and infrastructure investments will bring the greatest rewards – companies that are forced into hasty 'quick fixes' in order to meet regulatory pressures in the future will find that their solutions cost more and are less effective.

- **An open standards-based approach would boost market potential** – an approach to IT-platform accessibility based on open standards would enable interoperability and a greater degree of collaboration between vendors, prompting a free exchange of information and encouraging innovation. Following this approach would make accessibility-related products more commonplace, which would in turn act to drive down price points for businesses and end users.
- **A harmonized regulatory approach would assist development** – if different regional technical standards are created, IT vendors will be forced to focus on complying with various mandates rather than developing new and innovative solutions. Standardization would enable a global market for accessibility-related products to develop, with resultant economies of scale and vendor collaboration helping to drive development.
- **Greater understanding of costs needed** – Datamonitor believes that many companies still have little concept of the costs involved with accessibility-related implementations – by reinforcing the fact that accessibility need not be a major drain on resources, vendors can boost the appeal of investing in applicable solutions.
- **Vendors and advocacy groups need to take the lead** – IT vendors need to ensure that their customers are aware of the benefits of deploying accessible IT solutions, beyond those relating to regulatory compliance – Datamonitor believes that many companies are still not aware of the further-reaching benefits that can be provided.

Summary and conclusions

Improving accessibility offers clear advantages for organizations in terms of both ensuring compliance with regulations and opening up wider business benefits. However, Datamonitor believes that a better understanding of the financial and business advantages of such solutions is needed; IT vendors and advocacy groups need to continue to educate the market, reinforcing the message that improving accessibility can provide ROI, as well as improving productivity among employees and enhancing societal standing.

Technology has the capacity to virtually eliminate the barriers faced by people with disabilities in the workplace. For this to become a reality, businesses, government agencies, regulatory bodies and advocacy groups need to work together to ensure that the market for accessible IT solutions reaches its full potential. When all users, regardless of ability or age, are able to interact with IT and communications systems without undue inconvenience, we will know that accessibility efforts have been a success.

IT ACCESSIBILITY FOR BUSINESS ADVANTAGE

What is IT accessibility?

IT accessibility is all about ensuring that IT systems are available to everyone – regardless of ability or age'

– Leading accessibility advocate

Technology has the potential to be an important leveler for people with disabilities, increasing opportunities for employment and independent living. In the context of this white paper, accessibility refers primarily to the ease (or indeed difficulty) for individuals with disabilities to access IT and telecommunication systems. Improving accessibility can act to extend the effectiveness of technology for these individuals, while also enabling employees of all abilities and ages to access and use IT services. Accessibility is about removing barriers and opening up access to ensure that services are available to everyone.

The changing focus of accessibility

Business-related accessibility efforts have traditionally focused on ensuring that all employees have equal employment opportunities. However, there has recently been a significant shift toward improving accessibility of computer-based applications and services, both for employees and customers. In addition to the environment of increasing regulatory pressure relating to accessibility, and the moral factors that will always prompt consideration, there is a growing recognition among business decision makers that failing to cater for those with disabilities makes little commercial or economic sense.

Blurring distinction between accessibility and usability

The terms accessibility and usability are closely linked – while accessibility is concerned with the ability of individuals (including those with disabilities) to use digital systems and to interact with information, usability is all about ensuring that IT services are easy to use for everyone. Although accessibility and usability each address different aspects of an overall approach for 'access to information', increasing regulatory and societal pressure is acting to blur the distinction between the two areas – for example, making websites easier to use also improves accessibility. With the distinction between the two terms continuing to blur, accessibility and usability will increasingly need to be considered together to generate maximum benefit and cost savings.

Why should companies invest in accessibility?

Many businesses are only just beginning to consider the possibilities afforded by improving the accessibility of IT systems. However, while regulatory compliance is currently the key driver of accessibility investment, other business-centric advantages are becoming increasingly evident. This section examines the key factors that will prompt increased focus on accessibility, highlighting the reasons why business decision makers should pay greater attention to what is an important and potentially beneficial area.

IT is a core part of the current business landscape

IT is now pervasive in every sense, and is vital to the success of the vast majority of businesses. IT systems are essential at almost all levels of business, with an increasing proportion of employees using computer-based applications and services on a regular basis in order to fulfill core job functions. Furthermore, society in general is highly dependent upon IT and communication services for functions ranging from employment to entertainment.

As a result, IT systems can be seen as either an important enabler or potential barrier to the ability of individuals to access and use information. While society in general has benefited in numerous ways from the IT revolution, not everyone is able to reap the full benefits. In the majority of cases, people with disabilities cannot participate fully as technology is not designed with accessibility in mind; while the use of assistive technologies can help to adapt IT services for use by people with functional limitations, such solutions are piecemeal in nature and are often found lacking in terms of overall usability.

The importance of IT will increase further over the next decade and beyond, resulting in a growing need for accessibility to ensure that all services are available to all individuals, business partners and clients. Furthermore, the number of people that are in need of more accessible solutions will increase over the coming years due to an increasingly ageing workforce in many countries.

Changing demographics prompt a new approach

Accessibility-related solutions have traditionally been targeted at users with disabilities ranging from sight and hearing impairments to reduced motor functions. According to the World Health Organization, more than 750 million people around the world have a speech, vision, mobility, hearing or cognitive impairment. However, while addressing the needs of these individuals will remain a core focus for accessibility-related projects, a major development over the next decade will be the increasingly ageing workforce.

Ageing workforce will drive need for accessible IT solutions

While the number of people affected by long-term disabilities will remain relatively stable, a combination of longer lifespans and delayed retirement plans is creating a larger base of IT users that have disabilities and resulting functional limitations. Statistics support the fact that increasing age has a major impact with regard to the likelihood of individuals developing disabilities of some nature.

- **Around half of all working-age adults have at least minor impairments** that result in difficulties in undertaking daily tasks, including many that are exacerbated with age. While many of these individuals are not considered to be disabled – either by themselves or society in general – they represent a significant secondary market for accessibility-related IT solutions.
- According to the American Association of Retired Persons (AARP), **a quarter of people will acquire a functional disability by the age of 50**, with the likelihood increasing to one in two by the age of 65.
- **Approximately 20 per cent of the total US population has some form of disability**, while three-quarters of the populace aged 80 and over have impairments, highlighting the fact that age has a significant impact on the propensity of individuals to be affected by such problems.

Hence, the role of accessibility is not just to open up IT services to individuals with disabilities, but also to allow people to maintain independence and productivity that age would traditionally make problematic.

Act now, or pay later

With a growing proportion of workers now over 50 years of age, there is increasing pressure on companies to maintain productivity among their more mature employees and ensure that knowledgeable workers are retained wherever possible. The key message is that employability should not be affected by age or ability, but should be open to all. Companies must prepare for the fact that the average age of their employees could rise considerably over the next decade – acting now, rather than reacting to the problem at a later date with makeshift solutions, could provide significant benefits.

From a market development perspective, Datamonitor believes that seniors and people with disabilities need to be considered as a single target sector for accessibility-related solutions – a view supported by many across the industry:

'The PwD and seniors markets need to be targeted as a single entity in order to create the scale needed to make organizations and governments more aware of the issues faced' – **Major US non-profit organization**

Convergence of these groups would increase the size and potential of the market for relevant solutions, which in turn would boost the political power of those supporting initiatives to provide improved IT accessibility.

Regulatory pressures provide a springboard for development

Regulatory pressure has forced many businesses to improve the accessibility of their public-facing IT operations in order to enable a wider range of users to access services. In most cases, regulations have focused on ensuring that accessibility of company websites is improved to enable individuals with disabilities to have equal access to information from both public and private sector organizations. Regulations are not often linked to internal IT accessibility, although by not developing this area companies could be guilty of failing in their equal employment opportunity obligations.

Regulations prompt greater focus on accessibility

Regulations have been implemented in most major markets in order to open up IT services to those with disabilities – in many cases, these developments have been the result of lobbying on behalf of affected groups. Regulations have forced companies to take a closer look at accessibility; new laws mean that companies must make their IT services more accessible to all users or face financial repercussions:

- In the US, Section 508 of the Rehabilitation Act mandates that web content maintained by the federal government must be made accessible to people with disabilities, and that IT procurement should be limited to accessible products wherever a relevant solution is available.
- From October 2004, part 3 of the 1995 DDA became law in the UK – the regulation requires all public and private organizations to make reasonable adjustments to ensure services are available to individuals with disabilities.

Datamonitor believes that the regulatory environment will continue to play a crucial role, and will increasingly move into the private sector arena.

A harmonized regulatory approach is needed

At present, regulations relating to accessibility are generally being determined at a regional or national level. While this has been successful with regard to ensuring that businesses maintain a greater focus on the area, Datamonitor believes that a harmonized global approach to regulation would be highly beneficial in driving awareness of accessibility solutions. Regulations are important not just in terms of driving uptake of accessibility among end-user firms, but also prompting the technology industry to develop products that support these efforts.

Global harmonization of regulations and technology standards is vital if accessibility is to reach its full potential. However, localized initiatives are creating a rather disjointed approach to providing solutions, as highlighted by an accessibility advocate interviewed for this white paper:

'Harmonization of regulations relating to accessibility is absolutely crucial; without some form of collaboration, accessibility is unlikely to develop as quickly as possible' – **Leading accessibility advocate**

The creation of international regulations for accessibility would act to ensure the compatibility of products, resulting in improved usability, consistency and ultimately lower prices for users.

Greater enforcement needed

Although regulations are now in place in many regions, few instances of firms being penalized for failing to comply have come to light. Despite increasing regulatory pressure, many companies are still not providing accessible IT services to their customers; a survey carried out by Internet consulting firm LB Icon in the UK (shortly after the new legislation came into effect in October 2004) identified that 81% of websites operated by FTSE 100 companies failed to provide adequate levels of accessibility. The views of a UK-based financial institution support the fact that enforcement is currently limited:

'The DDA needs to be more forceful with regard to enforcement; unless someone makes a major issue of accessibility issues, little is going to be done' – **UK-based financial services institution**

While a certain degree of leniency is to be expected while new regulations are implemented, there remains reluctance among the courts to prosecute. While, ideally, businesses would invest in accessibility of their own accord, Datamonitor believes that a landmark court case would provide a necessary kick-start for the sector.

eGovernment initiatives driving public sector development

Perhaps uniquely in the IT and communications arena, the government sector is far ahead of the private sector with regard to accessibility. In many countries, the Internet is becoming an increasingly important conduit for government information services, and the means of providing these services at lowest cost is a key issue for government organizations of all kinds. An accessible Web is therefore crucial in order to ensure equal opportunities for all citizens, including those with disabilities. Regulations, such as section 508 in the US, have also forced federal agencies to acquire only IT solutions that are accessible to all users.

Increased access to services a prerequisite of eGovernment

eGovernment initiatives are forcing both better accessibility among public sector employees and also improved access to information for citizens. This has prompted agencies to invest heavily in accessibility-based solutions, and hence the public sector provides useful examples of what can be achieved for private sector firms looking to meet requirements in this regard. Furthermore, regulations are increasingly focusing on the private sector following initial development in the public sector, as outlined by the comments of an accessibility specialist at a major IT vendor:

'We're starting to see more interest from the private sector – our clients want to know what they need to do to make their IT systems more accessible' – Global IT vendor

From an IT vendor perspective, many accessibility-related solutions initially developed for the public sector may be repurposed in order to meet private sector requirements, reducing the need to maintain two product portfolios and minimizing cost.

Wider business advantages are becoming evident

Although regulatory pressures and eGovernment initiatives have proven to be important drivers of accessibility, Datamonitor believes that the area offers far wider benefits for businesses than simply opening up IT services to those users with disabilities. Technologies aimed at individuals with severe disabilities can also help to improve the IT-related experiences of the broader majority of users – Datamonitor believes improving IT accessibility has strong potential in terms of simplifying technology usage for individuals that encounter functional limitations across the entire range of degrees of severity. Such enhancements can help to improve users' experience, and result in increased productivity when related to employees.

Improved IT experience for all users

As with many improvements aimed primarily at individuals with disabilities, IT accessibility offers benefits for all users. In the physical environment, solutions such as automatic doors and curb cuts make life easier for everyone; similarly, accessible web pages are often easier to read and navigate, and the screen magnifier functionality built into many software applications help all individuals to better view sections of small text.

Not only can solutions developed with the PwD community in mind help to open up IT services to this audience, they can also improve the experience of all users. As an example, by using assistive technologies such as track balls and screen magnifiers in certain situations, individuals can reduce the potential for future health problems such as RSI and visual impairments relating to excessive VDU usage. Taking this to the next stage, improving accessibility can help to improve the way that individuals interact with all IT services, improving efficiency and employee/customer satisfaction.

Accessibility and the pervasive IT arena

IT services are increasingly being accessed from a broad range of devices and platforms, including the Internet and mobile devices; accessibility has a role to play with regard to ensuring that users of all such platforms can access IT services, enabling more widespread and efficient usage. While this will be a challenge, maintaining a diverse range of platforms/devices may provide benefits with regard to making IT services more convenient to access for a wider range of users.

The increasingly diverse range of devices now evident in the business environment also provides potential for greater accessibility by better meeting the needs of certain users. For example, IVR telephony solutions can help visually impaired individuals to access information services in a more convenient manner, while simplifying screen layouts for PC usage can help to solve problems with regard to other delivery channels such as PDAs and mobile phones. In these ways, improving accessibility can help to improve usability for all users.

What is holding back market development?

While it is clear that numerous benefits exist with regard to improving IT accessibility at a business level, in many cases development has been limited to meeting regulatory requirements – in essence, companies are only doing what they are forced to do, rather than being proactive and looking at the wider potential of such strategies. This section looks at potential market inhibitors from a business perspective and suggests ways in which these issues can be resolved.

Most accessibility deployments take a piecemeal approach

Problem: *standalone approach to accessibility is inefficient* – at present, the majority of companies approach accessibility in a very disjointed and standalone manner, in many cases responding to regulatory pressures or individual demands for improved usability. Datamonitor believes that greater benefits can be achieved if accessibility is considered as a core element of IT implementations, rather than being included as standalone investment further down the line – a view supported by the experiences of an IT vendor interviewed for this paper:

‘Compatibility and interoperability are reduced when standalone technologies are used to improve accessibility – an integrated approach is needed’ – Global IT vendor

Solution: *widespread integration of accessibility reaps greatest rewards* – Incorporating accessibility from the beginning of an IT implementation is almost always easier, less expensive and more effective than adding this functionality further down the line; accessibility needs to be a key issue that is considered when procuring IT solutions, not a costly add-on. Considering accessibility as a core part of all IT implementations can enable costs to be spread across multiple projects, leveraging investment and reducing the need for expensive duplication of effort.

Many vendor initiatives are proprietary in nature

Problem: *insular approaches to accessibility are common* – some vendors are offering accessibility tools that enable their customers to gain greater advantage from software and open up these services to a broader user base. While these solutions have considerable merit with regard to opening up access to specific applications, there is a broader need to extend IT accessibility to all applications, so those with specific requirements are not excluded.

Solution: *an open standards-based approach would boost market potential* – consistent worldwide standards are needed to open up IT services to everyone, including those with disabilities. An approach to IT-platform accessibility based on open standards would enable interoperability and a greater degree of collaboration between vendors, prompting a free exchange of information and encouraging innovation. This would be of particular benefit to vendors of specialized assistive technologies as it would make their solutions available to a wider variety of users on the full range of client IT platforms. Ultimately, following this approach would make accessibility-related products more commonplace, which would in turn act to drive down price points for businesses and end users.

Regulations vary considerably by geography

Problem: *regionalized approaches to regulation result in a disjointed market* – with the majority of regulations relating to the IT accessibility sector being regional or national in their scope, market complexity is high. IT vendors targeting this market are faced with the need to meet a series of mandates rather than focusing on product development.

Solution: *a harmonized regulatory approach would assist development* – Datamonitor believes that a harmonized approach is crucial – if different country/regional technical standards are created, IT vendors will be forced to focus on complying with various mandates rather than developing new and innovative solutions. Standardization, on the other hand, would enable a truly global market for accessibility-related products to develop, with resultant economies of scale and vendor collaboration combining to drive development and provide more choice for end users. This viewpoint is supported across the IT industry, as outlined by the comments of the accessibility expert at a global vendor:

‘Harmonization of regulations and standards is the number one priority for everyone involved in the IT accessibility arena – progress will be disrupted if multiple standards for accessibility are developed’ – **Global IT vendor**

A 2005 eAccessibility survey conducted by the European Union also supports the need for harmonization, with 74% of respondents considering there to be a lack of coherence among accessible IT products in Europe.

Accessibility perceived to be expensive, with no financial benefit

Problem: unclear ROI makes accessibility investment unattractive – as with the majority of IT-related solutions, investment in accessibility is heavily scrutinized by business decision makers. For companies that have not conducted a full ROI analysis, the general perception is that while investment in accessibility is essential due to regulatory pressure, limited financial benefits are likely. However, while improving IT accessibility involves making an initial financial commitment, this investment is usually offset by a full return on investment.

Reality: IT accessibility is not a drain on financial resources – although other accessibility-related benefits are important to IT decision makers, Datamonitor believes that many companies still have little concept of the costs involved with such implementations – some reassurance from vendors with regard to financial risk would therefore be beneficial in driving interest and uptake of such solutions. Vendors and advocacy groups should highlight the fact that accessibility need not be a drain on resources – indeed, there are numerous financial benefits of improving accessibility, as described below:

- **Direct financial benefits** – ensuring that customer-facing IT services including websites are more accessible can substantially increase the addressable audience of businesses, boosting revenue potential – especially if targeting the ‘baby boomers’ when they retire. People with disabilities represent a significant and often untapped market sector, and hence opening up services to these individuals can provide significant financial benefits. With regard to internal processes, improved accessibility for employees can help to increase efficiency and productivity, providing cost savings. Furthermore, improving accessibility reduces the chances of being fined for not complying with regulations.
- **Indirect financial benefits** – in addition to direct increases to revenue, improving accessibility can help to improve a company’s social standing, providing indirect financial benefits. If companies do not create accessible customer-facing services they face the serious issue of lost revenue and bad press from advocacy groups that represent the interests of disabled people.

This view is supported by an industry expert interviewed for this white paper:

‘The costs relating to improving IT accessibility are offset by the financial and social benefits relating to increased availability to PwD/seniors’

– **Global IT vendor**

Discussions with a number of companies that have implemented accessible IT solutions indicate that ROI can often be expected within 1-2 years, although the fact that many financial benefits are indirect means that this is difficult to calculate accurately. Datamonitor asserts, however, that accessibility can actually provide financial benefit, as opposed to being the costly investment perceived by many firms.

Lack of clarity with regard to next steps

Problem: *companies uncertain of how to handle accessibility* – while many firms recognize the fact that the PwD sector is highly valuable (in terms of both a source of employees and a sizable and lucrative customer base), few have a full understanding of how accessibility can be used to provide direct business benefit. A lack of clarity with regard to the advantages of investing in a proactive manner rather than when forced by regulatory pressure is particularly evident.

Solution: *vendors and advocacy groups need to take the lead* – IT vendors need to ensure that their customers are aware of the benefits of deploying accessible IT solutions, beyond those relating to regulatory compliance – Datamonitor believes that many companies are still not aware of the further-reaching benefits that can be provided. By reinforcing the fact that improving accessibility does not mean a significant financial commitment if done in the right way, vendors can boost the appeal of investing in applicable solutions.

As the concept of IT accessibility is still relatively new and underdeveloped, advocacy groups are not yet as vocal as in the equal employment opportunities area, although the situation is expected to come increasingly to the forefront over the next few years.

The future of accessibility

How is the market for accessible IT solutions like to develop over the next decade? While the current market is being driven by the need for regulatory compliance, Datamonitor expects companies to increasingly seek to embrace accessibility to open up their internal IT systems to a broader range of users, while also making these systems easier and more convenient for all individuals.

Companies beginning to realize the benefits of accessibility

Although IT vendors are increasingly advocating IT accessibility and providing customers with information which can be used to make informed decision with regard to deployment, there is still some way to go. In order to progress to the stage where the majority companies are investing in accessibility for reasons other than regulatory compliance, further education, greater levels of standardization and potentially more forceful regulations are needed.

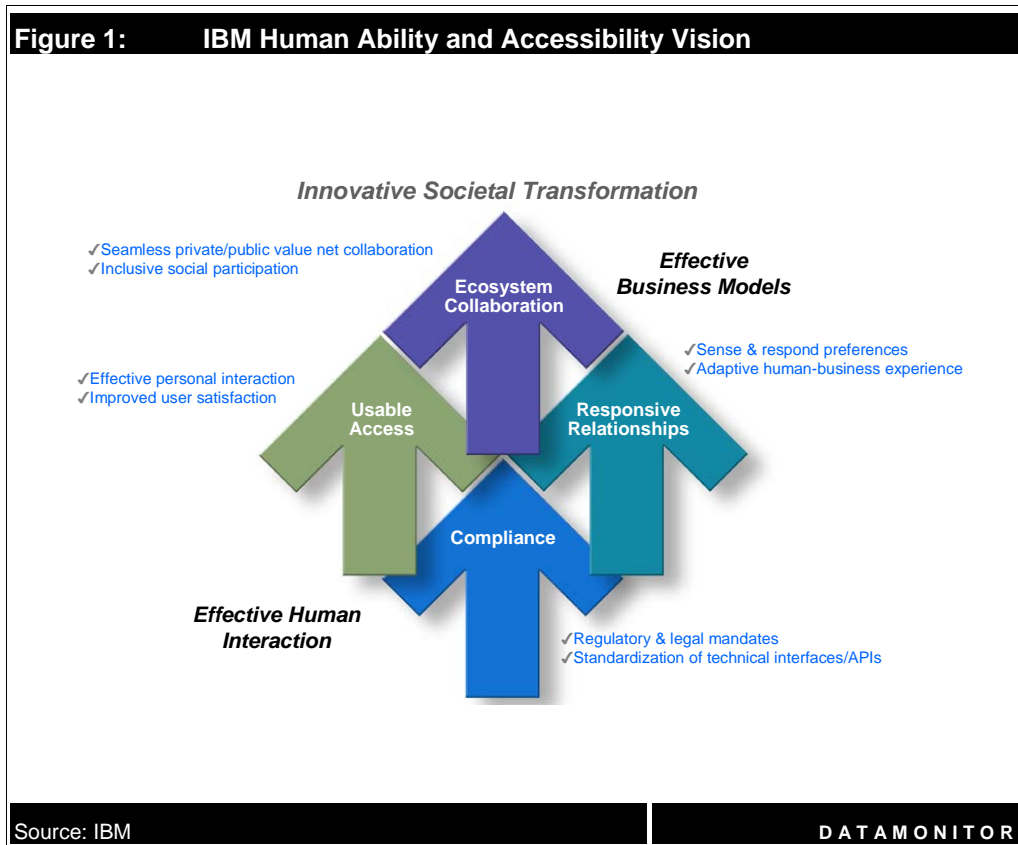
However, Datamonitor believes that certain companies are beginning to identify the opportunities afforded by investment in accessibility, and are increasing their focus on this area as a result. When a critical mass of companies is paying serious attention to accessibility, interest is likely to snowball due to the need for organizations to maintain pace with their peers.

Accessibility will become increasingly integrated into IT systems

Over the next decade, Datamonitor believes that the distinction between mainstream technologies and what is currently termed accessible technology will blur considerably. Increasingly, computers will adjust to a person rather than the person needing to adjust to the computer, enabling individuals to interact with IT systems in a more natural and comfortable way. Ultimately, the hope is that accessible and assistive technology products no longer exist, but such functionality is built into all IT systems to provide sufficient flexibility to enable access by anyone in whatever way they choose.

A holistic approach to accessibility development

As shown in the figure below, IBM proposes a holistic approach to the adoption of human ability and accessibility initiatives within and across organizations, with each aspect of implementation creating synergy with the others and creating a whole that is greater than the sum of the parts.



Although it is evident that many companies have either not considered IT accessibility at all or are just starting to ramp up their focus on the area, Datamonitor believes that IBM’s approach provides a solid framework that can be used to highlight the wider business advantages of investment in this area for organizations of all kinds. More specifically, this four-faceted approach underlines ways in which interaction both within organizations and throughout the broader business ecosystem can be improved by considering accessibility more fully, as outlined below.

- **Compliance** – this is the starting point for many companies, and indeed the area where the majority are still focusing their efforts. Compliance with worldwide standards and regulations is the foundation for further business transformation.

- **Usable Access** – actively seeking to improve the satisfaction and user experience of employees, customers/citizens and partners is an important leap beyond a pure compliance posture. Investing effort in this area can help firms to enhance productivity, retain employees, and improve relationships with customers and partners.
- **Responsive Relationships** – by sensing, responding to, and anticipating a wide spectrum of preferences of partners and customers, and by holistically addressing these needs and desires in a consistent way across the organization, companies can reap many benefits from greatly strengthened relationships.
- **Ecosystem Collaboration** – working together with other businesses and organizations to provide a more seamless experience for all individuals creates much more value for all participants, and provides a platform for wider societal transformation. By working closely with third parties, including IT vendors, partners and regulatory bodies, organizations can help to shape the direction of accessibility and ensure that solutions are more seamlessly integrated into all aspects of the networked world.

Although many companies' initial experience of IT accessibility will be from a regulatory compliance perspective, this should not suggest a linear process. An ideal scenario would involve companies looking to develop a comprehensive accessibility strategy from the outset, incorporating greater functionality than is required solely for compliance. Datamonitor research indicates that there is indeed a growing understanding of the benefits of accessibility investment, as highlighted by the comments of an industry specialist from a major US retail company:

'Although compliance is important, exceeding our customers' expectations is the key reason behind our increasing efforts with regard to accessibility'

– Major US retailer

Companies that are prepared to consider the wider advantages of accessibility are likely to be rewarded with greater business benefit, and will also strengthen their public image by being seen as leading advocates of rights for people with disabilities.

SUMMARY: ON THE RIGHT TRACK

Improving accessibility has clear advantages for organizations of all kinds, both in terms of ensuring compliance with regulations and opening up wider business benefits including making IT systems easier to use for everyone. However, in order for more companies to be willing to invest in IT accessibility, Datamonitor believes that a clearer understanding of the financial and business advantages of such solutions is needed; IT vendors and advocacy groups need to continue to educate the market, highlighting the fact that improving accessibility can provide ROI, as well as improving productivity among employees and enhancing societal standing.

Datamonitor recommendations

In order for accessibility to reach its full potential in the IT arena, Datamonitor believes that a number of changes need to take place. There are a number of ways in which companies can boost the effectiveness of investment in accessibility and ensure that the market for such products continues to develop over the next few years:

- **Consider accessibility as part of the wider IT environment** – in order to gain maximum benefit, companies should think about accessibility at the early stages of any IT implementation. Waiting until regulatory or employee pressure necessitates action will be more costly, less effective and more time consuming.
- **Seek information from IT vendors and advocacy groups** – Datamonitor believes that levels of understanding regarding the benefits of accessibility is still lacking in many businesses, especially beyond the regulatory requirement perspective. In order to improve understanding of the benefits of accessibility investment, businesses should seek assistance from both IT vendors and advocacy groups who support the needs of those with disabilities.
- **Support the push for open standards** – advocating open standards wherever possible will ultimately allow firms to benefit from the lower prices and broader choice that such developments will bring. By expressing a desire to invest more in accessibility, companies are likely to prompt action from vendors, who will look to provide profitable and effective solutions.

- **Be proactive** – taking a reactionary approach (i.e. considering investment when regulatory pressure demands action) is not the best way to approach accessibility. Being proactive and improving accessibility as part of broader IT transformation projects is likely to offer the greatest benefits.

Technology has the capacity to virtually eliminate the barriers faced by people with disabilities in the workplace. For this to become a reality, businesses, government agencies, regulatory bodies and advocacy groups need to work together to ensure that the market for accessible IT solutions reaches its full potential – a view supported by the CEO of a major US non-profit organization:

‘Looking forward, there needs to be a conscious recognition among both businesses and vendors that the PwD and seniors markets are highly lucrative, and need to be looked at differently’

– **Major US non-profit organization**

When all users, regardless of ability or age, are able to interact with IT and communications systems without undue inconvenience, we will know that accessibility efforts have been a success.