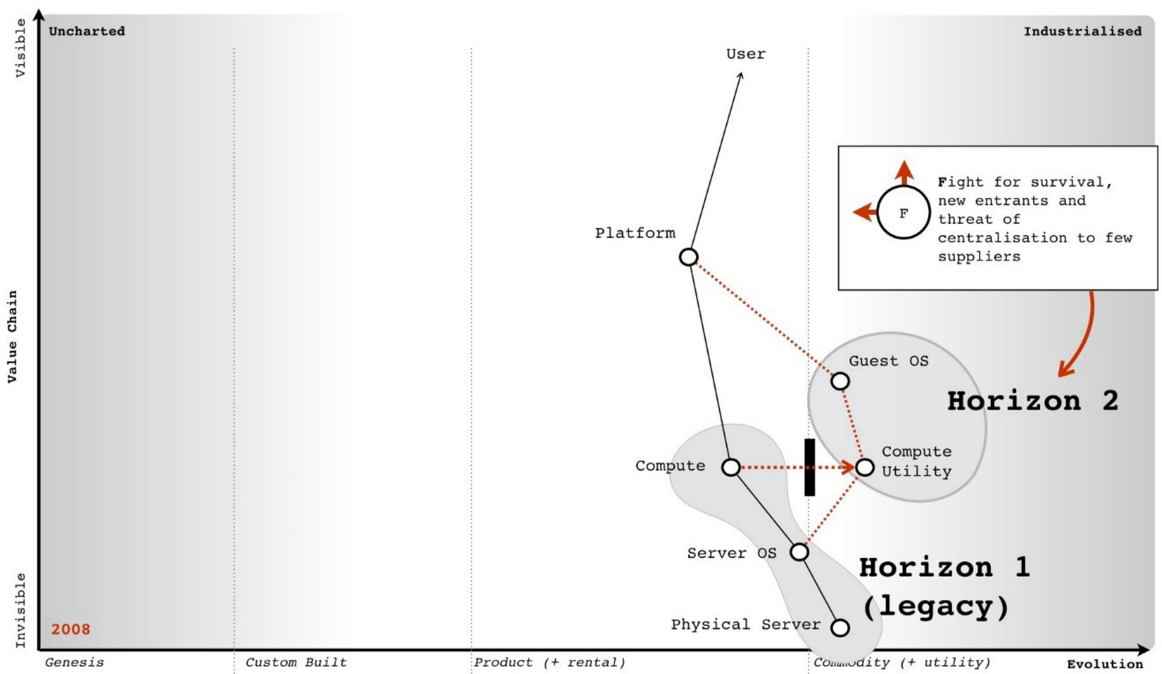
support was likely to become a legacy business. Instead, we needed to focus on horizon two and the commercial use of guest OS on top of these large virtualised computing environments. We understood that companies would have inertia to these changes and being a shift from product to commodity forms it was likely to be a punctuated equilibrium (period of rapid change). We also understood that the biggest threats into this space would be new entrants and given the state of strategic play in many companies then we were likely to see centralisation. I've drawn these concepts onto the map in figure 223.

Figure 223 — the changing market



We also understood that co-evolved practices would emerge, that we were unlikely to see significant savings in IT but instead increased development activity and that a further horizon, the shift of platform