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Complementing India With Nearshore Strategies: Spotlight On Spain

by Euan Davis
for Sourcing & Vendor Management Professionals



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Complementing India With Nearshore Strategies: Spotlight On Spain

How European Firms Drive Nearshore Value With Spanish Resources

This is the first document in the "Europe's Offshore Landscape" series.

by **Euan Davis**

with Andrew Parker and Antonin Shanahan

EXECUTIVE SUMMARY

Sourcing executives rarely hear about Spain as a nearshore destination, but Spain attracts vendors and buyers alike with its large, well-qualified IT labor pool, world-class vertically focused services resources, competitive IT services rates, and potential scale through linkage to Latin America. These are assets that Europe's more established nearshore destinations can't match. Spanish IT service delivery offers two routes to value depending on your sourcing maturity and industry focus: 1) first-time buyers, considering alternatives to India because of issues like recent bad press and incidents of terrorism, expect better collaboration and smoother working relationships from Spanish providers; and 2) enterprises already buying globally delivered services access the local factory models and domain expertise on offer in Spain to complement existing service delivery with complex technical design, IT transformation, or process execution skills.

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Forrester interviewed 20 end user companies across Europe and a selection of service providers, including Capgemini, HP/EDS, IBM Global Services, and TCS.

Related Research Documents

["The State Of Development Of The IT Services Global Delivery Model"](#)
November 7, 2007

["Topic Overview: Offshore Services"](#)
September 24, 2007

NEARSHORE OPTIONS LOOM LARGE FOR EUROPEAN BUYERS

For many European firms — especially those with parent companies in the US, the UK, and Northern Europe — outsourcing to Indian offshore providers has become a commercial imperative because of the cost and quality benefits that India delivers, and India continues to win the lion's share of offshore IT spending.¹ Yet, some buyers tell Forrester that risk factors like terrorism and corporate governance scandals, rising wage costs, and communication issues can impair India's attractiveness as a destination for IT service delivery. Such executives continue to prioritize nearshore destinations. European sourcing specialists understand that countries like the Czech Republic, Hungary, Poland, and Romania are strong nearshore locations but most fail to consider the advantages that Spain has to offer. Based on interviews with more than 20 sourcing executives, this report highlights those advantages and examines how sourcing groups should build Spanish options into their global sourcing approach.

Structural Issues Prompt European Buyers To Look For Options Beyond India

Today's offshore powerhouse — India — undoubtedly brings market maturity, cost, quality, and experience to buyers looking for offshore resources. But Indian labor rates have risen of late due to the country's very success. In parallel, controversy dogs Indian offshore captive centers, with firms that previously believed in the captive approach switching sides — scouting for third-party providers and exit strategies to monetize their facilities.² In the meantime, aggressive recruitment activity in India by international IT services firms and indigenous Indian vendors and the acute shortage of manpower in established centers like Bangalore and Mumbai create pressure toward wage inflation. Recent corporate scandal, civil unrest, and terrorism in India also cause some buyers to look again at alternatives to India. The forces swirling around the Indian market mean:

- **Challenges from attrition, wage inflation, and skill shortages.** The growth of captive centers, the global system integrators moving to India, and the growing complexity of IT project work undertaken in India have begun to stress the Indian labor market. Attrition rates have been high for some time, especially among the more experienced technical ranks and at middle manager level. Wage inflation, once only an issue for staff with three to 10 years of experience, has now taken hold at the entry level.³ Not only does this make it harder for suppliers to deliver consistently, it also narrows the gap between Indian offshore and European nearshore costs for service delivery.

“We see high turnover in the team our offshore service provider (in India) has assembled. This disrupts continuity because experienced people leave and new people come into the team and need bringing up to speed, resulting in delay. We make sure we track turnover ourselves rather than rely on figures from our vendor.” (UK media group)

- **India's cost advantage diminishes.** Rates for IT services have increased as resource scarcity drives costs — a situation that may change as the economic situation worsens. However, Forrester's tracking of negotiated rates (not rate cards) reveals rates for standard application

development and maintenance skills have inflated by 7% to 15% over the past two years. For a blended set of skills — from junior programmers to technical leads and project managers — the range has risen from between \$20.00 and \$26.00 per hour to between \$22.00 and \$30.00 per hour.⁴ There are still deals out there for companies and clients that are willing to accept inexperienced or poorly qualified staff or high attrition rates — but as the saying goes, “you get what you pay for.” Although Forrester surveys of European end users reveal general satisfaction with the quality of Indian service delivery, managers’ perceptions still show concerns.

“Although we get significant cost savings through our offshore vendor (in India) we do see inflation pushing up prices by about 15% annually and this needs watching carefully. Developers in my country (the UK) cost three times more than an Indian developer but why do we need three offshore developers to give us the quality of one UK developer? How do I get to a ratio of one for one?” (UK retailer)

European Perceptions Flavor Nearshore Preferences

Business and IT leaders may regard offshore service providers — with their insistence on process discipline and rigorous documentation — as lacking in some of the flexibility, innovation, and responsiveness they get from their service providers closer to home. The days are gone when IT customers sat opposite their developers and specified business requirements on the fly. However, the real issue rests between the business users and business analysts (and anyone playing a business analyst role) who must work within the confines of an offshore relationship when the distances demand constant travel to manage and support projects. When examining the possible benefits of nearshore options in conjunction with India, many decision-makers in Europe conclude that:

- **Physical proximity drives real-time collaboration.** For firms based in Europe, time zone issues with offshore vendors in locations such as India can hamper the success of an offshore initiative. With time zone differences between India and Europe, vendor staff, internal IT staff, and internal customer staff will struggle to establish viable and collaborative relationships. Nearshore arrangements, however, work to all parties’ advantage as both client and provider can work together in real time — project managers can easily commute between sites, facilitating interactions and minimizing overall risk.

“We are a very conservative and risk-averse organization and we have done no offshoring whatsoever to India — it’s too difficult for us to manage with the distances and the time zones involved. Nearshore is different because we find it easier and cheaper to manage.”
(Swiss financial services firm)

- **Real-time collaboration reduces internal change requirements.** Some firms adapt poorly to change, preferring to resist it where they can. Companies with immature or proprietary software development processes must optimize them before effective communication occurs with the offshore entity — requirements need to be detailed enough so that the offshore vendor can

interpret them to write an internal project specification. A nearshore relationship allows the client and vendor to discuss these requirements during normal business hours and makes it easier for customers with immature IT specification processes. Otherwise, multiple iterations of the same deliverable, deliverable rejection rates due to misrepresented requirements, and changes after code enters development, hit the offshore savings curve.

“In Bangalore, every company is a technology company serving US and UK markets. If you scope a project badly you get bad results and it’s our fault. Going nearshore, however, we find with our vendors that if you define poor logic, you have a better chance turning around something that works because the staff have more diverse experiences.” (UK IT services firm)

- **Shorter distances reduce management overhead and improve cultural fit.** Forrester’s investigations reveal that overhead costs for a nearshore relationship are typically less than those associated with an offshore relationship, primarily because of the reduced travel costs and management time needed to support them.⁵ Moreover, significant cultural differences between France and India, for example, far outweigh those between France and Spain, or Germany and Poland. Europeans are fairly familiar with each other’s customs, lifestyles, and other cultural facets — something which makes day to day nearshore working relationships easier.

“We factor an extra 30% into our baseline costs to India for travel and other soft factors such as physical connectivity and training but these should be built into the business case. Obviously going to Europe (nearshore) is cheaper.” (Global pharmaceutical firm)

“We see few differences in the working patterns of our nearshore partners, nor do we have any of the issues about time zones. We even share public holidays.” (UK IT services firm)

SPAIN OFFERS A CREDIBLE NEARSHORE DESTINATION

Although executives worry about India’s challenging political, cultural, and language barriers, there is no doubt that interest in remote IT delivery is on the rise. Buyers — particularly those in France, Italy, Germany, and Switzerland — continue to seek alternative delivery destinations to India or destinations that complement it.⁶ Interviews that support this research highlight the benefits of using nearshore services from Spain.

Country assessments usually focus on government stability and the quality of the infrastructure but miss important issues like cultural affinity for offshore work and the scale and health of indigenous vendors. Understanding Spain’s unique nearshore approach requires this broader analysis. End user firms in Spain overwhelmingly rely on local players for IT service delivery, scarcely using providers based in India.⁷ Low local staffing costs, underpinned by software factory models, help them match the rates offered by Indian vendors. But offshoring does go on — drawing on Latin America’s substantial reserve of offshore resources that offer service propositions to firms in countries like Argentina and Mexico, as well as in Spain — and it is increasingly opening up to clients in Europe.⁸

Skills, Scale, And Location Underpin Spain's Appeal

Interviews with end user firms that are already accessing services from Spain reveal the attractiveness of the country as a destination for IT service delivery. They rate Spain for the skills of its people, the strength of its technology infrastructure, its nearshore location, and its ability to scale. Although firms hire companies rather than countries, our interviews reveal that Spain offers the ingredients to make a nearshore strategy a success with strong positive factors including its:

- **Large skilled IT labor pool.** Spain's IT services industry counts just under a quarter of a million IT professionals living and working in Spain and one of the highest European growth rates of IT graduates entering into the market.⁹ The ratio between Spain's local IT labor pool and its total population ranks the country ahead of Europe's familiar nearshore destinations of the Czech Republic, Hungary, Poland, or Romania while ICT salaries compare favorably and feed into competitive rates for IT services work (see Figure 1) Our interviews reveal, however, that firms use Spanish resources to support more complex IT projects such as business process execution, IT transformation, and business process redevelopment, rather than low-cost staff augmentation, highlighting the complementary role Spanish IT resources play in a global IT service delivery.¹⁰

“We have a captive center in India, but the quality of services we get from our Spanish center is very good. We find the computer science graduates from the local universities support our European BI (business intelligence) function very well and we have few problems attracting talent to work for us.” (Global food manufacturer based in France)

- **Industrialized software factories.** Spain's network of software factories beats offshore rates for specific application development or maintenance work. Spain's software factory model (well known in Spain but less known as a concept in the rest of Europe) provides rapid, low-cost software development using assembly-like processes copied from manufacturing. Spanish end users invest in their own factories or buy software development through a vendor's factory aligned to domain or technical expertise.¹¹ Most suppliers operating from Spain focus on delivering specific domain IP (banking and retail in particular) or complex high-end IT services (SAP design work or process expertise around business intelligence).

“Software factories do it with quality in mind — they sell a trademark and that trademark is the quality of the programmers rather than their price. Standards and processes are tried and tested in many commercial environments and lower our risk.” (UK telecom firm)

- **Domain expertise.** Spain provides a home to the headquarters of only a handful of very large enterprises but each punches above its weight. Famous names from the Spanish financial services sector (Grupo Santander), retail (Inditex, parent of Zara), and utility sectors (Iberdrola) are world-renowned for lean process, innovation, and technology supremacy, which their peers are keen to emulate.¹² The presence of these sophisticated service buyers has helped to encourage global system integrators and pan-regional services firms to focus on building

centers of excellence — via the software factory model — across Spain to foster vertical expertise, capture innovation, and develop service excellence on clients' behalf. For example, EDS recently won a number of high profile deals with Spanish banks that the firm expects to provide a platform for further banking business around Europe. Its software factories in Barcelona, Valencia, and La Coruna provide banking clients with IT and BPO services.

“We see lots of innovation around core banking processes in Spain. Why? Because if you go back to the late 1970s, the Spanish banks were way behind — what they did was leapfrog banks elsewhere once Spain's economy took off. The giants of Spain are now world-class in their use of technology. Banks like BBVA and Banco Santander continue to create special processes to reduce back-office cost which always have technology at their root.” (Global tier 1 systems integrator)

- **Potential to scale with Latin American resources.** A Spain/Latin American delivery model in theory offers a substantial pool of skilled resources from Spanish-speaking South America to service European clients.¹³ Currently, the bulk of IT services work undertaken in Latin America for European customers serves those that have commercial objectives in the region but evidence suggests that this is changing. Local Spanish vendors increasingly leverage Latin American resources to support clients beyond Spain while the large systems integrators now pull Latin American facilities into global delivery models. Moreover, Mexico's advanced indigenous vendor landscape — currently serving the needs of US customers — now has several vendors targeting European opportunities through local Spanish divisions.¹⁴

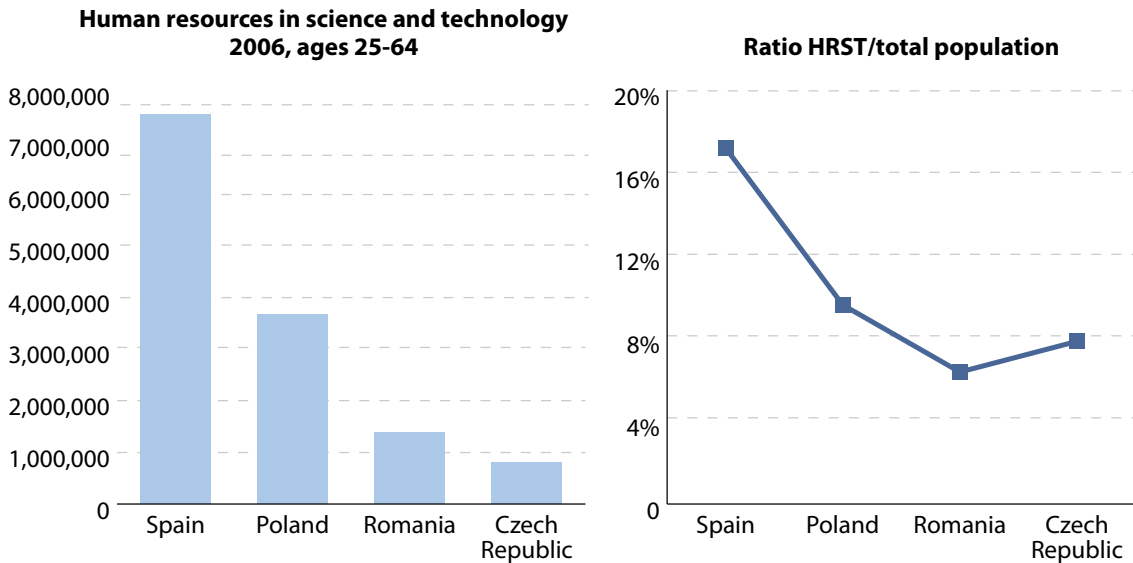
“Scale will always be an issue, but keep in mind that Spain has the back office of Latin America.” (International healthcare firm based in the UK)

“Argentinean rates are very attractive, and what's more, they have adopted EU legislation on data privacy.” (Global pharmaceutical firm)

Figure 1 IT Salaries Feed Lower Rates, And Graduates Feed A Large Local IT Labor Pool

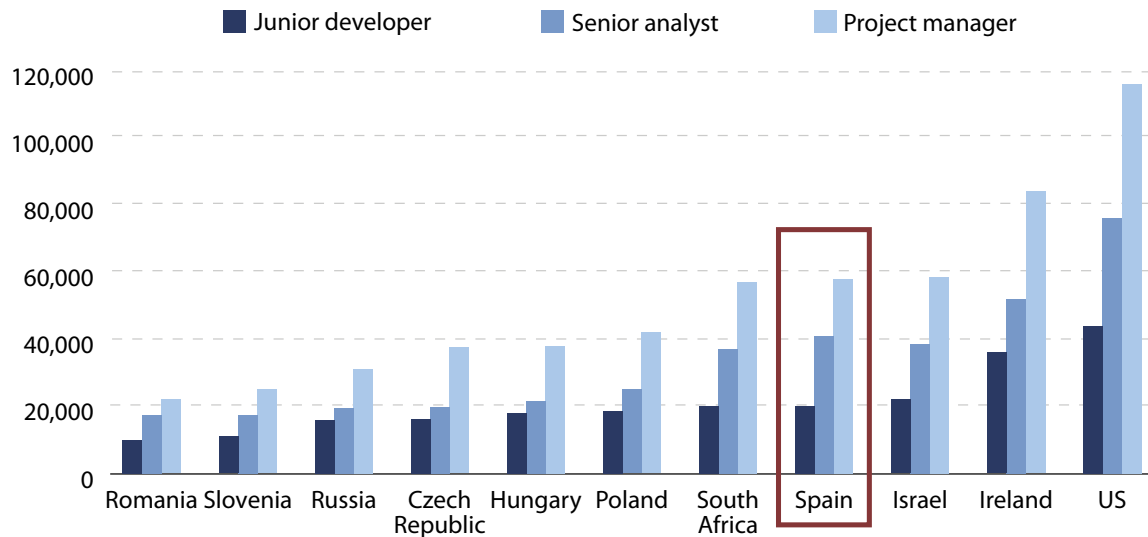
1-1 Spanish graduates feed a large local IT labor pool

Human resources in science and technology with tertiary education, ages 25-65



Source: Annual data on HRST with tertiary education, by field of education and age, Eurostat 2008

1-2 Salaries in the Spanish ICT sector (USD)



(Average gross annual earnings in industry and services in enterprises with 10 or more employees)

Source: NeoIT, Sedisi, INTERES (2005)

46904

Source: Forrester Research, Inc.

Spain Offers Two Routes To Nearshore Value

Spain offers the ingredients to make a nearshore move successful with a thriving technology economy, competitive software development rates, industry innovation, and the potential to scale low-cost delivery in Latin America. Providers putting together global delivery strategies clearly see Spain as an IT service destination and firms should investigate this option. Sourcing executives will find two routes to value:

- **An alternative to India for first-time buyers.** First-time offshore buyers that have reservations about using Indian services should look nearshore and select small projects and pilot applications with the right critical mass — limited projects that require limited interaction with end users. Make sure to conduct internal due diligence on your internal IT processes before moving forward. Without effective project management, requirements definition, and change control processes in place, it can be difficult for organizations to work with any Spanish supplier effectively (see Figure 2).

Figure 2 Decision-Making Steps For Nearshore Experimenters Looking To Spain

Step	Activity	Rationale	Method
1	Audit applications	Take an accurate account of corporate applications and processes for moving nearshore. Assess the potential savings that moving application development or management would generate.	Capture application inputs and outputs, the application’s architecture, and work out how good the supporting documentation actually is.
2	Document best practices	Supports an effective transition and ongoing service-level agreements to underpin workflow and governance between delivery hub and onshore resources.	List current best practices, e.g., project specifications capability, quality of documentation, escalation procedures, and change management methodologies.
3	Pilot a nearshore project to Spain	Stable applications with solid documentation and that don’t face into critical business operations make good candidates to move nearshore and often generate the highest level of savings.	Start with a contained new development or the conversion of a legacy system. Measure the stability, programming language, platform capability, and business criticality.
4	Strengthen business analyst function	Connecting remote resources to business stakeholders puts the business analyst function in the driving seat, ensuring effective communication between business and the remote IT service center.	Reorganize and retrain the business analyst function to ensure effective information flow. Train job specific skills around project management, project definition, requirements analysis and management as well as others.

- **Source of complementary high-end skills for mature sourcing departments.** Buyers looking to build out a global delivery strategy to complement Indian resources should investigate the high-value IT service capabilities on offer either independently or through their IT service partners. For those experienced at offshoring, Spain offers specific functional process expertise and business process transformation. For example, a European manufacturer recently moved its SAP support and programming work offshore, leaving more complex SAP design tasks and business analysis function in Spain. Even some of the work sent to India may come back to Spain — higher headcounts needed to do the work in India have eliminated the expected cost savings. The success of the Spanish competency center now leads the firm to create a finance and accounting (F&A) shared service center in the region, supplying 13 different countries across Europe.

RECOMMENDATIONS

FOCUS ON THE SITE VISIT AND LOCALITY FOR SUCCESS IN SPAIN

Smart executives harness offshore strategies beyond India into Eastern Europe, Latin America, and Russia — and for some service providers and end users, Spain. The low-cost location of choice remains India, but India's success creates problem in terms of inconsistent delivery and rising prices, compounded by problematic communication and misaligned culture for many executives across Europe. Less mature sourcing organizations that are nervous about moving nearshore must first commit to a degree of internal IT process change before considering any move. However, executives with established experience with offshoring and who are seeking complementary vendor skills from Spain should:

- **Use site visits as an essential part of the sourcing process.** Only meeting your intended partners on their home soil will allow you to assess whether corporate cultures synchronize to ensure a smooth working relationship. Instincts count when examining the supplier, its extended organization, and the executives who will work with you. Nearshore locations do provide better collaboration opportunities due to their physical and cultural proximity but success depends on reorganizing internal IT processes to ensure faultless service to your own internal stakeholders. This process is nonstandard and fluid with stakeholders who are accustomed to changing requirements frequently and informally in a way that even nearshore relationships make difficult. Success demands good communication and cultural awareness between onshore and nearshore entities.
- **Leverage Spain's regional autonomy to drive a discount on the deal.** Spain's regional diversity, which is driven by a political tendency for autonomy, offers sourcing executives a negotiation lever. Many of the provinces collect business taxes themselves and offer financial incentives for attracting firms to their regions. Investigate if there's any money on the table from location rebates that could sweeten your decision to move IT delivery nearshore to Spain. Lobbying by your company or local partners help make the economics of the business case and the final rates you pay more attractive.

- **Seek out local support organizations for advice and back up.** Several institutions work like India's NASSCOM organization and are responsible for maintaining interactions between the different regions, the IT industry, and replicating best practices across the country. They offer sourcing executives support as they investigate nearshore options in Spain. For example, "Invest in Spain" is part of the Ministry of Industry, Tourism and Trade and deals with foreign companies investing in Spain. And the Spanish Association of Consultants (Asociacion Española de Consultoras) can facilitate preliminary contact between buyers and vendors.

ENDNOTES

- ¹ Even for the large multinational service providers (such as Accenture or Capgemini), India has become the center of firms' offshore efforts. To combat the pressure on India, service providers continue to turn their sights to other destinations like Argentina, China, and Vietnam — but with mixed results. A variety of issues — lack of scale (Chile or Malaysia), high telecom costs (South Africa or Vietnam), or IP protection concerns (China) undermine the ability of these countries to relieve the pressure on India. See the November 7, 2007, "[The State of Development Of The IT Services Global Delivery Model](#)" report.
- ² Forrester continues to track trends for captive centers. Our research reveals that a lack of management support, spiraling costs, attrition, and a lack of integration see more than 60% of the captive centers in India struggling. See the April 30, 2007, "[Shattering The Offshore Captive Center Myth](#)" report.
- ³ See the November 7, 2007, "[The State Of Development Of The IT Services Global Delivery Model](#)" report.
- ⁴ As companies begin to renegotiate contracts with their Indian or global IT services providers, it is important to understand the pricing trends in the Indian IT services market. There has been a lot of press about the rising labor rates in India, and it appears that clients are having a hard time cutting through the hype. See the April 5, 2007, "[Trends In Indian IT Services Pricing](#)" report.
- ⁵ See the January 8, 2007, "[Offshore Cost](#)" worksheet.
- ⁶ Forrester conducted more than 20 interviews in Q3 2008 to quantify European trends in global delivery and how nearshore and Spanish perceptions figure. Interviewees were senior sourcing decision-makers from a variety of industry sectors in Europe.
- ⁷ Spanish firms buck the twin IT services trends of offshoring and outsourcing — local service providers run the show. Offshoring remains extremely rare, as localized staffing costs match anything that the Indian vendors can bring to the table. But outsourcing continues to gather momentum as Spain's technology-literate financial services sector begins experimenting. See the June 22, 2006, "[Spanish IT Services Spending Forecast: 2006 To 2011](#)" report.
- ⁸ Offshore vendors are starting to link Europe and India through Spain and Latin America. TCS has more than 6,500 employees located in Spain. TCS links these with more than 5,000 South American employees under an umbrella "Iberoamerica" operating unit. The company maintains that the rates charged from its Uruguay delivery center, for example, are 15% lower than those from India.

⁹ Official statistics from 2007 reveal that Spain's 65 IT universities with more than 83,000 students supplied more than 9,000 IT graduates into the local ICT market, while Spain's 40 telecom universities with more than 37,000 students supplied almost 4,500 graduates. Source: Instituto Nacional de Estadística (<http://www.ine.es>).

¹⁰ A.T. Kearney's 2007 Global Services Location Index ranked Spanish skills in the top three among the developed nations surveyed. A.T. Kearney recommended that customers use Spanish resources in support of more complex IT service delivery work. Source: A.T. Kearney (http://www.atkearney.com/shared_res/pdf/GSLI_2007.pdf).

The value equation between costs and skills improves when considering the average salary levels and cost-of-living figures found between Spain and the EU 15. To give an idea of the differentials, the average gross annual earnings in industry and services of full-time employees (in enterprises with 10 or more employees) pegs Spanish earnings at approximately 50% of those in Germany. Source: Eurostat 2007 (http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1090,30070682,1090_33076576&_dad=portal&_schema=PORTAL).

The Software Engineering Institute's formal appraisals provide a perspective on the availability of high-end software engineering skills through its annual report. In September 2008, the institute noted the second highest number of formal appraisals and CMMI maturity levels in Spain ahead of the UK, Germany, and Italy. Source: Software Engineering Institute (<http://www.sei.cmu.edu/appraisal-program/profile/pdf/CMMI/2008MarCMMI.pdf>).

¹¹ Large multicountry systems integrators such as Accenture, Capgemini, CSC, EDS/HP, IBM, and Steria, as well as the local players Ibermatica, Indra, Tecnomcom, and offshore vendors like Mexico's Softek and India's TATA, leverage software factories throughout the Spanish peninsula.

¹² For example, a study by management consulting company Arthur D. Little examined the cost income efficiency ratios of 25 European banks for 2006/07. Four Spanish banks appear in the top five: Banco Popular Espanol, BBVA, Caja Madrid, and Grupo Santander. Spanish banks have invested heavily in innovative IT to improve customer service and internal efficiency. Source: Arthur D. Little (<http://www.adl.com>).

¹³ Mexican and Argentinean offshore resources make credible offshore contenders after improving their position on a recent geographic attractiveness benchmark. In fact, Latin American countries were collectively the biggest gainers according to A.T. Kearney's 2007 Global Services Location Index relative to the same Index for 2005. Despite currency appreciation, strong sector growth, and corresponding wage inflation, Brazil, Chile, and Mexico rose to fifth, seventh, and tenth, respectively, compared with 10th, eighth, and 17th in the 2005 Index. Argentina rose from 23rd in 2005 to 20th in 2007.

A.T. Kearney cited improvements in the people skills and the overall business environment as reasons for the improvement in Argentina, Brazil, and Mexico, despite a slight decrease in overall financial attractiveness in each of the three locations. Chile's financial attractiveness held steady, while people skills and overall business environment improved. Argentina had the highest financial attractiveness among the four and led Latin America except for Costa Rica and Uruguay. Source: A.T. Kearney's 2007 Global Services Location Index: Regional Highlights (http://www.atkearney.com/main.taf?p=5,3,1,160&utm_source=pr&utm_medium=atk)

¹⁴ Argentina, with the highest percentage of university graduates in Latin America, provides a resource pool that international vendors have begun to exploit, and which its government recognizes with specific steps such as synchronizing data protection standards with European legislation.

Due to the efforts of leading providers including Hildebrando, Neoris, and Softek, Mexico is a well-established nearshore destination. Softek now has facilities in Spain. See the July 26, 2007, “Latin America Is Best Suited For A Complementary Offshore Role” report.

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Making Leaders Successful Every Day

Headquarters

Forrester Research, Inc.
400 Technology Square
Cambridge, MA 02139 USA
Tel: +1 617.613.6000
Fax: +1 617.613.5000
Email: forrester@forrester.com
Nasdaq symbol: FORR
www.forrester.com

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