

Report

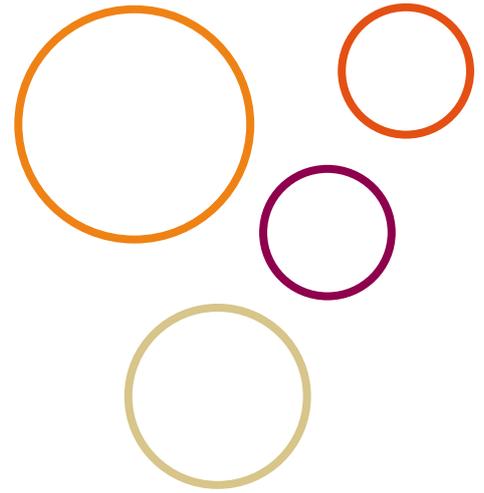
Consultancy, in the DNA of  
**innovation**



Spanish Association  
of Consulting Firms







# Contents

Introduction

2

Executive summary

4

Innovation in Spain

8

Consultancy as a catalyst of innovation

22

Innovating is the essence of success

34

AEC members

36



# Introduction



**Manuel Pimentel**  
Chairman of the AEC

**Spain's consultancy industry is set to play an essential role in the country's economic recovery and modernisation.**

To achieve this, it invests talent and resources in a task that requires vision for the future, a renovating spirit, a quest for rigorous, imaginative solutions and a determined and constant commitment to research, development and innovation (RDI), all essential for optimising its client's services and profits and increasing their productivity and competitiveness. Without a clear goal and an continued drive to innovate, and without a stable, specialised team of consultants dedicated to RDI, technological consultancy firms would lose their market position and place their very survival in jeopardy in the immediate future.

Consultancy firms make important investments to innovate their products and services, their methodologies and their production models, fully aware that innovation is one of the industry's great assets. Innovation in the firms themselves and the services they offer –combined with added value in clients from the public and private sectors and society at large– is the key strategic elements that fosters growth and consolidation on both domestic and international markets.

Innovation and consultancy share many key components. The AEC defines innovation as any new knowledge-based change that generates value; for its part, the aim of consultancy is to offer the



market, through its services, a value proposition, using change management as an element of transformation, and the knowledge and talent of its staff as the basis of its business. In certain contexts, therefore, innovation and consultancy are synonymous.

However, innovation must not only be an inescapable sectorial goal; it must also represent a shared common commitment, a national goal. This is why it is so important to have an effective government policy on RDI incentives, such as allowances in Social Security contributions for research staff (which in the ICT consultancy and services industry, applies to consultants working on innovating projects with their clients), as well as any initiatives and regulations offering effective support and

stimulus to companies working in the field.

The AEC includes all the leading Spanish consultancy firms serving technological companies and services and innovation is one of the essential planks of its business at this vital moment for the Spanish economy in general, and for the industry in particular.

The challenge we face is to use our leading position, to contribute to consolidating Spain's identity as a country with a solid and dynamic technological fabric as an instrument of innovation, and as a provider of quality services with competitive features, essential in ever more demanding and decisive global market. This is why it is so important to identify the current

situation of innovation in Spain; to highlight the progress made to date; to determine our position vis-à-vis other countries in the region, particularly other EU states; to define the challenges we will face in stimulating and developing innovation in the near future; and to come up with practical proposals for bringing innovation to all companies and government bodies through consultancy. That is the aim and the scope of this report.



# Executive summary

## Introduction

The Spanish Association of Consulting Firms (AEC) defines innovation as “any new knowledge-based change that generates value”. The definition contains three key elements: the challenge of innovation (generating value), the path (new change) and the foundation (knowledge). It is also useful to note what it does not include: it does not identify innovation with technology, in the belief that such technology is a tool, but not an end in itself.

Taking this definition as our basis, we can see consultancy as a key element for innovation. The consultancy industry has the capacity creatively to orient knowledge and experience towards the needs of the market and society. It facilitates the innovating implementation (disruptive improvement, paradigm shift, etc.) of products, services or processes to generate economic and social value and it allows organisations to monitor the

possible risks and uncertainties associated with the new.

Innovating is vital. Innovation is the engine powering today’s economy and the key to success in existing organisations: it improves market share, productivity and product and service portfolios. Innovation involves everyone – not only because all organisations have to innovate, but also because innovation has to be performed in collaboration. Today’s innovation requires an ecosystem linking all the different agents: companies and organisations within the same group, providers, customers, the public, competitors, private R&D centres, government, universities and technology centres. It involves creating a space for the transfer of knowledge and experiences, because knowledge on its own moves too slowly.

Consultancy firms play a key part in the creation of such an innovation ecosystem. They form the necessary and natural



nexus between all the different economic and social agents. Innovation forms part of the genetic make-up of consultancy and the industry therefore has the capacity and the experience needed to transfer it to other organisations in the form they need. The position of innovation in Spain has certainly improved, and recognising the ground that has been covered encourages us to advance further along the same road, a road that is full of opportunities.

## Aim and scope of the report

AEC seeks to encourage innovation. The purpose of this report is to give a clear view of the innovation in this country. We have set ourselves two principal goals:

- To show the current situation of innovation in Spain, in order to underscore the achievements to date and highlight future challenges, in order to

encourage further promotion and development.

- To propose practical ways of bringing innovation to all companies and government bodies through consultancy.

The report is structured as follows:

- **Trends in innovation.** We have tried to offer an analysis of the current situation that is as broad and neutral as possible. We have examined different areas (private and public enterprise), looking at all productive sectors, in the conviction that innovation is not confined to specific domains.
- **Case studies of success.** The case studies of success in innovation we have chosen for publication are intended to demonstrate the breadth of possibilities in this area. They are not intended to be a comprehensive list of all successful cases of innovation in this country (which



## Innovating is vital for the success of organisations

can be found elsewhere), but to reflect how innovation is possible in different domains.

- **The role of consultancy in innovation.** The report has been designed to show that innovation lies within the reach of any organisation. For this reason, we do not offer innovation solutions for specific industries, preferring instead to show that it is open to any sector within the economic and social fabric.
- **Diversity of sources consulted.** In order to offer a neutral overview, we have used a range of different official and private data sources from Spanish and European organisations. In particular, we have drawn on the following sources:
  - Fundación Cotec para la Innovación Tecnológica (2013): *COTEC Report 2013*.
  - OECD (2010): *Measuring Innovation: A New Perspective*.
  - Centro para el Desarrollo Tecnológico Industrial (CDTI) (2009): *Informe I+D+i en España*.
  - Instituto Nacional de Estadística –INE– (2013): *Survey on innovation in business. 2012*.
  - Marca España: <http://marcaespana.es/es/quienes-somos/que-es-marca-espana.php>.
  - ESADE (2009): *Segundo Informe InnovaRH. Cómo gestionar el talento para la innovación: la organización ambidextra*.
  - Ministry for Economy and Competitiveness (2012): *Estrategia Española de Ciencia, Tecnología e Innovación 2013-2020 [Spanish Science, Technology and Innovation Strategy 2013-2020]*.
  - Gartner (2013): *Gartner Symposium ITxpo 213. The Top 10 Strategic Technology Trends for 2014*.
  - European Union (2014): *Innovation Union Scoreboard 2014*.

## Main conclusions

The main conclusions of this study are:

- **We are operating in an innovation-based economy.** The country's competitiveness is based on innovation. Companies need to compete with new and different products and services using more sophisticated production processes. Innovating companies generate qualified and knowledge-intensive employment, contributing value to the environment and society in which they operate.
- **Innovation in Spain lies below the European average.** Innovation in this country has improved in recent years; however, we are still well behind European leaders. Spain comes 17th among the 28 EU members, six places below the European average.
- **Lack of culture of collaboration among agents involved.** The primary reasons for this situation are a failure to devote financial and human resources and a the lack of a culture of collaboration among all the agents involved in innovation: business, public bodies, universities and research centres, among others.
- **All organisations can innovate.** Innovation means applying technology appropriately to management models and business models. Innovation is therefore open to all sectors and domains in which companies and public authorities operate, as demonstrated by the many successful cases of innovation.
- **Innovation is part of the very essence of consultancy.** Consultancy is therefore a catalyst for innovation:
  - For its capacity to create an ecosystem for innovation: a collaborative space

## Without collaboration there is no innovation; consultancy establishes an ecosystem of innovation

that links all the agents involved in innovation.

- For its knowledge of how to create novel solutions: contributing new technologies and new organisational and business models, taking trends in innovation into account and managing and minimising risk.
  - For its capacity to measure return on investment: contributing monitoring mechanisms that allow organisations to assess the tangible and intangible benefits of innovation.
  - For its capacity for mentoring in transformation, in order to support successful implementation of the change always required by innovation.
- **Consultancy is a strategic partner of business and government.** Given consultancy's transformative capacity, it can provide help in making the changes and reforms required in the current economic situation in both the public and private sectors.



# Innovation in Spain

## Innovation as a tool for overcoming the crisis and for further growth

Innovation is necessary. Without innovation it will not be possible to achieve sustained growth in our economy. To put it another way, the success of our organisations is impossible without innovation.

National economies can be grouped into three major stages of development<sup>1</sup>:

- In the first stage, the economy is supported by unskilled labour and the exploitation of natural resources. Competition is based on low prices and the market operates with basic or consumer products. Competitiveness depends on the good functioning of public and private institutions, well-developed infrastructures, a stable macroeconomic setting and a

workforce with at least a basic education.

- In the second stage, development comes mainly from efficiency. Economies have to develop more efficient production processes and increase product quality. Competitiveness now depends on superior training, the efficiency of goods and labour markets, the existence of developed financial markets, the capacity to capitalise on existing technologies and a large domestic or global market.
- In the third and final stage, innovation, socio-economic needs can only be satisfied if companies are capable of competing with new and unique products and services. The country's competitiveness is based on innovation. Companies have to compete by producing new and different goods using

<sup>1</sup> Fundación Cotec para la Innovación Tecnológica (2013): *COTEC Report 2013*.



## Growth in the Spanish economy is now inconceivable without innovation

more sophisticated production processes and creating innovative products and services. Spain belongs to this group of economies and our principal engine of growth therefore needs to be innovation.

As the OECD<sup>2</sup> points out, firms' investment in intangible assets contributes to their output growth not only at the time of investment but also in later years. Intangible assets are defined as new knowledge that leads to an improvement in production processes, a change in the organization and the generation of new products and services. In other words, growth is not only the product of investment in labour and physical assets, a characteristic of economies at a non-innovation-based stage of development.

Our innovation-based economy means that the success of an organisation depends on

its capacity to innovate. The improvements offered by innovation can be seen in all output dimensions of an organisation (market share, productivity, exports and job creation)<sup>3</sup>:

- Innovating companies have increased their market share by 10 percentage points over non-innovating ones.
- Innovating companies have substantially better productivity (16 percentage points higher) meaning that they play an essential role in improving the competitiveness of the economy.
- Export capacity also increases by around 18 percentage points. Innovating companies therefore have a much higher level of internationalisation.
- Innovating companies have a significantly larger product portfolio;

<sup>2</sup> OECD (2010): *Measuring Innovation: A New Perspective*.

<sup>3</sup> Centro para el Desarrollo Tecnológico Industrial (CDTI) (2009): *Informe I+D+i en España*.

they have a 15 percentage-point higher likelihood of increasing their product portfolio.

- Innovating companies have a 2 percentage-point higher capacity for job creation than companies that do not innovate.

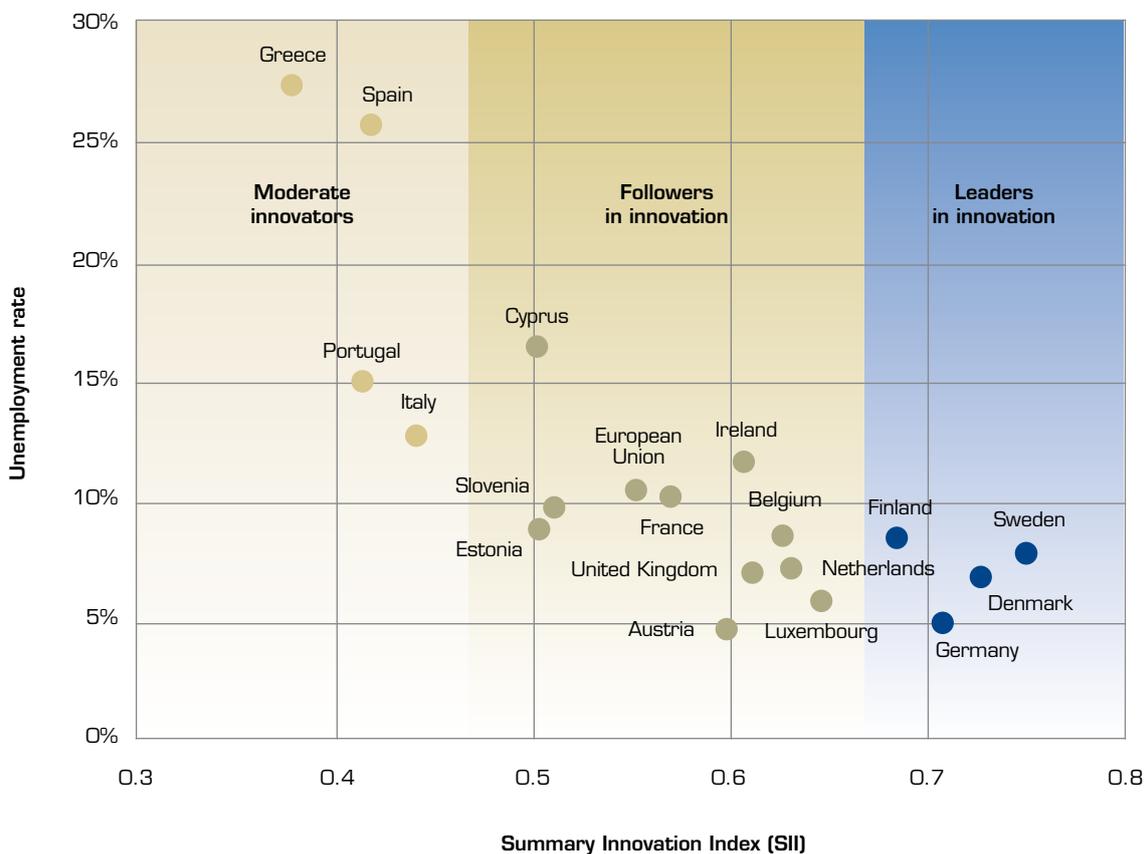
In our innovation-based economy, this is a key factor for job creation (see Table 1). The Summary Innovation Index (SII) is an indicator used by the European Union to classify the level of innovation in each member state. Countries that perform better in innovation, such as Denmark, Finland, Germany and Sweden, have a lower average unemployment rate.

Innovation is necessary for survival and success in developed economies. Starting from this premise, we need to look at the current state of the innovation space in this country.

### Innovation in Spain, below the EU average

The European Union classes Spain as a “moderate innovator” (2012), with a below-average Summary Innovation Index (SII). This places us in a group of countries that stands ahead of the “modest innovators” but behind the “innovation followers” and “innovation leaders”. Each group can in turn be divided into growth leaders, countries with moderate

Table 1. **Summary Innovation Index (SII) and unemployment**



Source: European Union (2014) and AEC.

growth and countries with slow growth. In 2012, Spain rose from the “slow growth” to the “moderate growth” group, though with a growth rate of 0.9%, it is the lowest in its class (see Table 2). Spain comes 17th among the 28 EU members, six places below the European average.

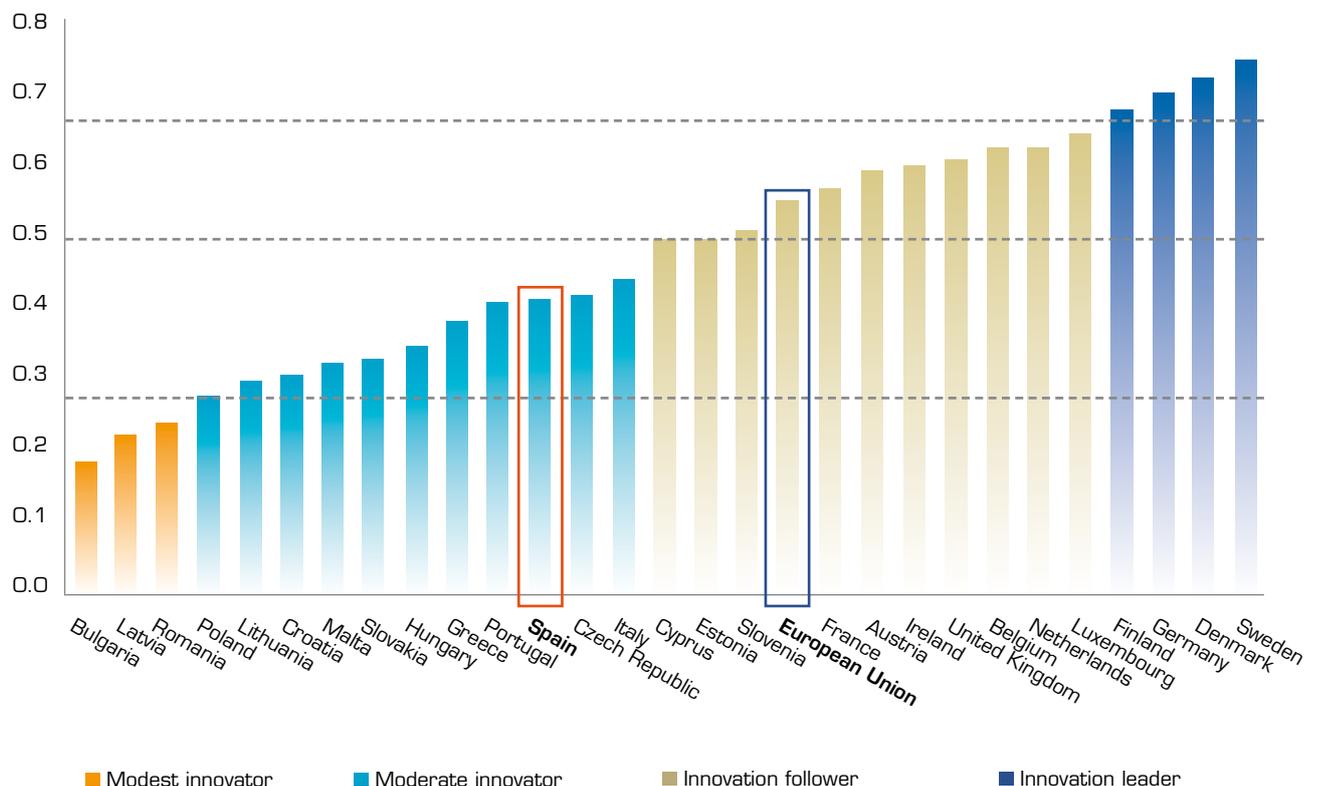
In 2012, Spain had an SII of 0.407, barely 75% of the EU-27 average (0.544), though it should be noted that it rose two places compared to 2011.

The SII is the average of a series of 24 indicators grouped into “Enablers”, “Firm activities” and “Outputs” (see Table 3). Spain scores poorly in practically all indicators. The only indicator (in blue in the illustration) for

## The consultancy industry has the capacity to orient knowledge and experience creatively towards the needs of the market and society

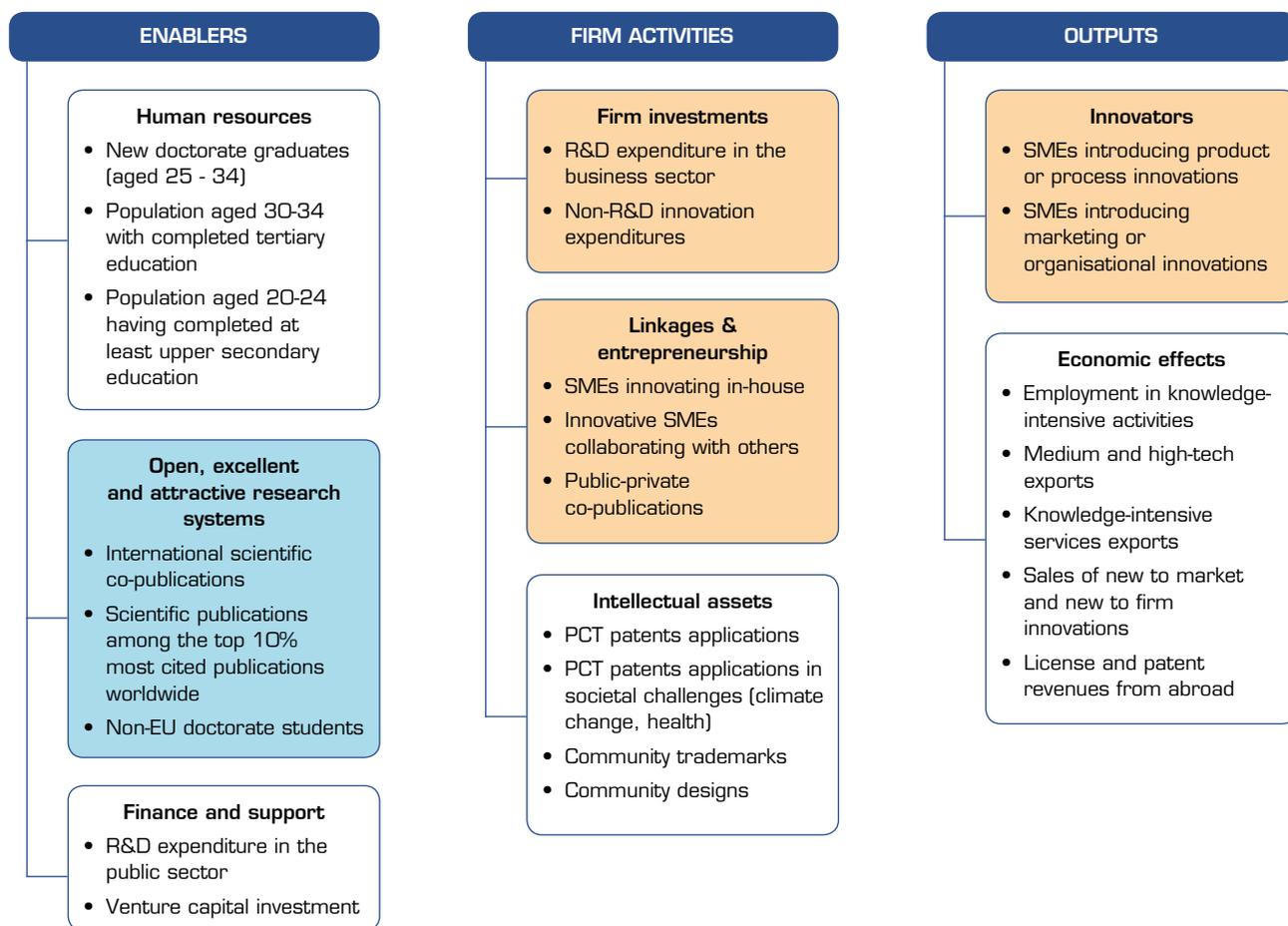
which it has a better-than-average situation and trend is in research systems, where it scores 1.03 times the EU average and growth rate which, though negative (-8.2%), is somewhat better than the overall EU figure (-9.9%). The worst indicators (shown in

Table 2. Summary Innovation Index (SII) of European Union member states



Source: European Union (2014).

Table 3. **Situation of Summary Innovation Index (SII) indicators in Spain**



Source: European Union (2014).

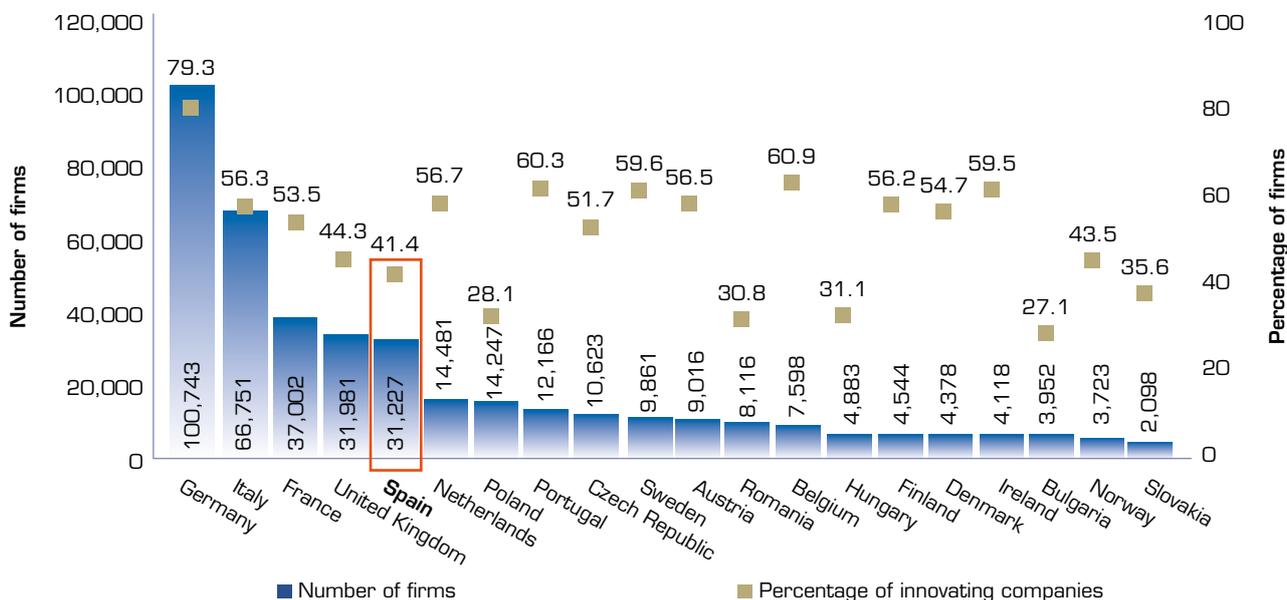
orange), where Spain scores little over half the European average, are in linkages and entrepreneurship (56%); firm investments (55%); innovators (also 56% of the EU average, with growth 17 points below the average).

If we analyse the strengths and weaknesses shown in the indicators in combination, we see that while we have a good research system, this is not translated into opportunities for innovation. It should be of particular concern that while there is a good research system, Spain nonetheless scores very poorly in terms of linkages between firms (or organisations). This situation must be changed.

## Consultancy has become a strategic partner of business and government

The result can be seen in the relatively low number of innovating companies (see Table 4). In Spain, only 41.4% of companies are classed innovating, in

Table 4. Innovating firms in European member states (2010)



Source: INE (2013).

contrast to 79.3% in Germany (the maximum) or 59.5% in Ireland.

According to experts<sup>4</sup>, there are several reasons for this situation:

- Failure to devote human and financial resources.
- Absence of innovation-financing culture on Spanish financial markets.
- Mismatch between the technological offer of technology centres and the real needs of companies.
- Lack of culture of collaboration among companies and between companies and research centres.
- Lack of public funding for developing emerging companies.

By relating these causes to the indicators used to draw up the SII<sup>5</sup>, we can establish a picture of cause and effect to explain

the current situation of innovation (see Table 5).

The main causes of the lack of innovation in Spanish companies are as follows (see Table 6):

- Cost (for 44% of companies): this explains why the “Business investment” indicator is so low.
- Lack of interest in innovating (30%): perhaps because the SII result indicators are not good either.
- Market-associated factors (27%): in other words, the SII’s “Finance and support” and “Linkages & entrepreneurship” indicators, which also score low.
- Lack of knowledge (22%): also due to the low capacity for relationship among the

<sup>4</sup> Fundación Cotec para la Innovación Tecnológica (2013): *COTEC Report 2013*.

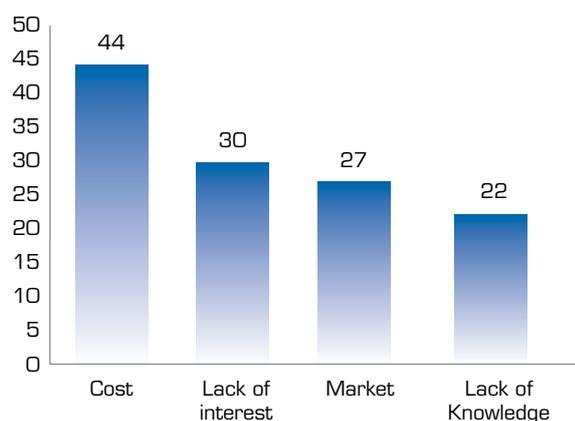
<sup>5</sup> In order to focus on the causes of lack of innovation, we have not included the “Output” indicators in this table.

Table 5. **Obstacles to innovation affecting SII indicators**

SUMMARY INNOVATION INDEX INDICATOR		OBSTACLE TO INNOVATION
Enablers	Human resources	<ul style="list-style-type: none"> <li>• Insufficient human resources dedicated</li> </ul>
	Open, excellent and attractive research systems	
	Finance and support	<ul style="list-style-type: none"> <li>• Absence of a culture of financing innovation on Spanish financial markets</li> <li>• Lack of public funding for development of emerging companies</li> </ul>
Firm activities	Firm investments	<ul style="list-style-type: none"> <li>• Insufficient financial resources dedicated</li> </ul>
	Linkages & entrepreneurship	<ul style="list-style-type: none"> <li>• Technological offer of technology centres doesn't match companies' needs</li> <li>• Insufficient culture of collaboration among companies and between companies and research centres</li> </ul>
	Intellectual assets	

Source: AEC.

Table 6. **Percentage of all companies mentioning each of the factors as hindering innovation or influencing the decision not to innovate (2006-2011)**



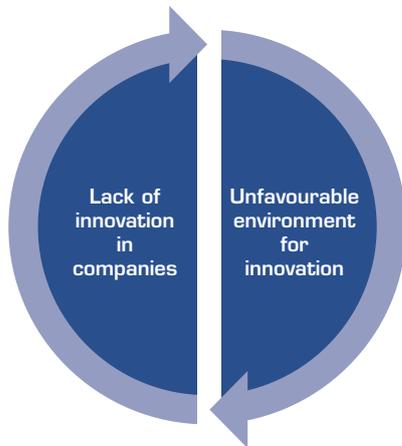
Source: Cotec (2013).

actors related to innovation (“Linkages & entrepreneurship” indicator).

The situation can be said to be a vicious circle (see Table 7):

- There is an unfavourable environment for innovation, manifested, for example, in poor SII indicators (scarce human and financial resources, lack of an area for relations between agents, mismatch between supply and demand).
- As a result of this unfavourable environment, companies are not devoting (not necessarily economic) resources to innovation, because they consider it to be costly or to offer a low short-term return on investment.

Table 7. **Vicious cycle of innovation**



Source: AEC.

- The lack of innovation in organisations creates an environment of apathy and disinterest, which discourages innovation.

This vicious circle must be broken. It is essential to create a collaboration space that will facilitate capacity for linkage and understanding among all the agents involved in innovation. Such a space will be vital in helping Spain rise from its current 17th place in the EU's SII innovation ranking to the position to which it truly aspires.

### **Innovation and the Spain brand working together in an area of mutual aid**

The macro-ecosystem for innovation is the Marca España (Brand Spain) project. Following on with the idea of generating a virtuous circle or suitable environment for innovation – which will in turn improve that environment– on good starting point is the Spain brand: a good Spain brand leads to innovation, and vice versa.

**The transformative capacity of consultancy means that it can help make the changes and reforms that both the public and private sectors require in the current economic situation**

Marca España (Brand Spain) is a state policy designed to improve the country's image at home and abroad for the common good<sup>6</sup>. Improvements in image are the overall result of small individual actions. We all have a part to play in improving the Spain brand, and innovation plays a leading role in driving this goal.

Improving the Spain brand makes it possible to attract more investment, facilitate internationalisation of our companies and the sale of our goods and services, access international financing markets under more favourable conditions, attract a larger number of highly-qualified personnel and adopt a more active role and a strengthened position on international decision-making forums. All of these factors will provide positive backing in SII indicators in which Spain performs worst.

The Marca España project is based on three certainties:

- The image of a country is subject to constant change.

<sup>6</sup> Marca España: <http://marcaespana.es/es/quienes-somos/que-es-marca-espana.php>.

## Countries that perform best in innovation –Denmark, Finland, Germany and Sweden, for example– have a lower unemployment rate

- It is feasible to influence that change.
- It is the task of the public authorities to design policies that will improve that image.

AEC is working actively to help Marca España, by incentivising innovation, the main agent of change, and helping bring the corresponding policies to private organisations. Thanks to innovation, international recognition of the Spain brand is developing:

- Innovation facilitates exports because of its capacity to address needs on international markets that had previously not been covered or by introducing methods to help reach those markets.
- Innovation helps situate Spain as a world leader in leading-edge industries such as renewable energy, high speed rail, infrastructures, transport, logistics, finances, safety, ICT and biotechnology.
- Innovation has a strong social and environmental dimension (organ donation and transplant system, health management, water storage management, beach conservation, etc.), contributing to global recognition.
- The innovating capacity of Spanish organisations allows them to attract and

retain talent in all sectors, but especially in leading-edge industries, such as renewable energy, high speed rail, infrastructures, ICT and biotechnology.

- This makes it easier to attract international funding.
- Finally, the whole situation reinforces Spain's position on international decision-making forums.

## Talent as a raw material for innovation

Innovation requires talent, because talent is its main raw material. However, Spain is not optimally placed in this regard and specific practices for talent management need to be applied.

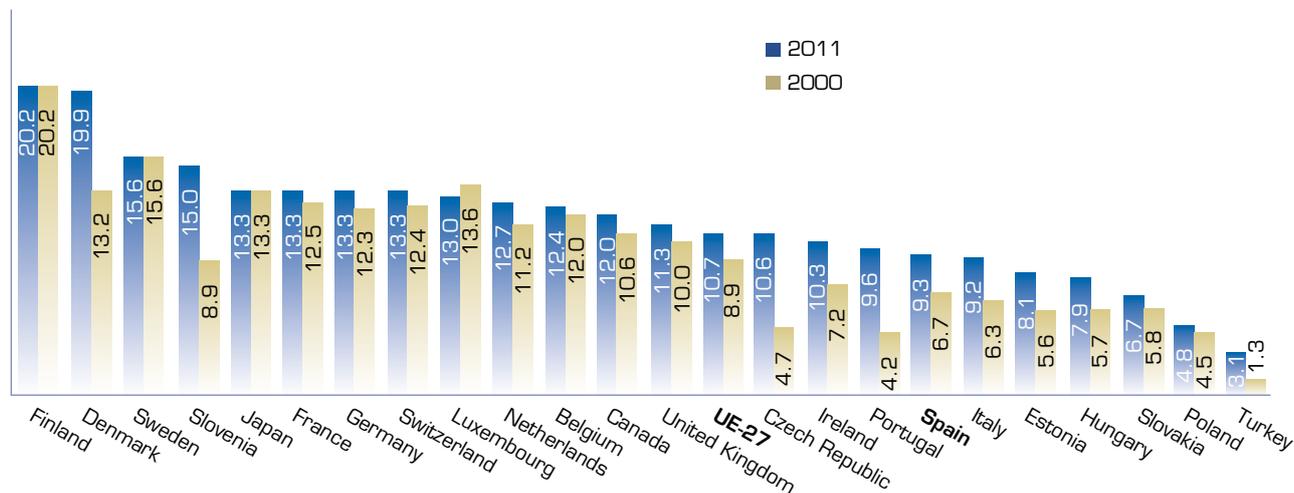
Two of the dimensions analysed in the EU's Summary Innovation Index (SII) relate to human resources and the research system.

In the first, Spain's is growing at a slower rate than the EU average in new doctorate graduates and youth aged 20 - 24 with upper secondary level education. We perform better in the percentage of population aged 30 - 34 with tertiary studies (due to private studies or experience). In the second dimension, we stand out from the European average in the number of scientific publications, and have a close-to-average growth in the citation rate. However, we fall behind in attracting non-EU doctoral students.

Analysing these two dimensions in combination, it may be concluded that there is already a high level of talent that will enable us to face the challenges of knowledge, but there is a risk that we will not be able to keep that level up, due to an absence of young people with upper secondary education, our failure to attract external talent and a lack of

Table 8. Resources devoted to R&D in OECD Countries (2000-2011)

R&D personnel per thousand workers



Source: Indicadores del Sistema Español de Ciencia, Tecnología e Innovación (2013).

real opportunities, causing our talent and our entrepreneurs to go abroad.

Resources devoted to R&D in Spain are considerably below other OECD Countries. (see Table 8). The situation is even worse in the private sector (2.3 researchers per 1,000) than in the public sector (4.5)<sup>7</sup>.

In an attempt to address this situation<sup>8</sup>, the *Estrategia Española de Ciencia, Tecnología e Innovación 2013-2020 [Spanish Strategy on Science, Technology and Innovation 2013-2020]*<sup>b</sup> sets a primary overall objective of recognising and promoting talent in RDI and ensuring its employability. To achieve this, it has established the following specific goals:

- To promote training and skills-building of human resources for performance of RDI activities.
- To promote mobility and develop research degrees.

- To incentivise the incorporation of human resources trained in RDI.

To achieve these goals, we need to understand what type of talent is required for innovation. Innovation requires a specific type of talent, in some aspects different to that needed in other areas (such as operations, for example). This leads us to a series of practices typical of talent management (see Table 9), which are deployed in the areas of “Attraction and retention”, “Development” and “Motivation”.

Innovation is born out of talent, and innovating talent is born out of the right management practices. If we want to improve the micro environment of innovation, we need to be aware of the need to introduce and develop specific practices for improving talent. An innovating firm must analyse how to apply such practices.

<sup>7</sup> Fundación Cotec para la Innovación Tecnológica (2013): *COTEC Report 2013*.

<sup>8</sup> Ministry for the Economy and Competitiveness (2012): *Estrategia Española de Ciencia, Tecnología e Innovación 2013-2020 [Spanish Science, Technology and Innovation Strategy 2013-2020]*.

Table 9. Talent management practices for areas of innovation

Attraction and retention	Development	Motivation
<ul style="list-style-type: none"> <li>• External recruitment.</li> <li>• Use of various sources of recruitment.</li> <li>• Risk-taking in staff hiring.</li> <li>• Reduced emphasis on fitting the culture.</li> <li>• Performance-based retention.</li> </ul>	<ul style="list-style-type: none"> <li>• Not limiting performance evaluation to quantifiable criteria.</li> <li>• Not making conformity the predominant standard for evaluation.</li> <li>• Introducing formal systems of aid to performance (e.g., <i>on-the-job training, coaching</i>, etc.).</li> <li>• Introduction of non-bureaucratic paths to promotion.</li> </ul>	<ul style="list-style-type: none"> <li>• Provision of workplace autonomy.</li> <li>• Incentives for contributing new ideas.</li> <li>• Non-monetary rewards for contributing new ideas.</li> <li>• Avoidance of excessive wage compression.</li> <li>• Rewarding performance over seniority.</li> <li>• Giving line managers autonomy for talent management.</li> </ul>

Source: ESADE (2013).

## Innovation is open to all sectors

Our analysis of the situation of innovation in Spain has shown that insufficient resources are being devoted to this area. This may in part be due to a perception amongst companies that innovating is a costly exercise (see Table 6). This is based on an erroneous belief that innovation involves purchasing high-tech. Innovating is more than high-tech, and innovation to all sectors.

When it comes to innovation, some sectors stand head and shoulders above the pack (see Table 10). More of the half of all pharmaceutical and IT, electronic and optical products firms are considered to be innovating. Next come the chemical, motor vehicle, computer programming and telecommunications industries, where around 40% of companies are deemed to be innovating. However, there are innovating companies in all sectors: industries which by their nature are not viewed as innovating (metallurgy, rubber and plastics, finance and insurance) have a similar or higher proportion of innovating companies (over 30%) than the aero-space construction industry.

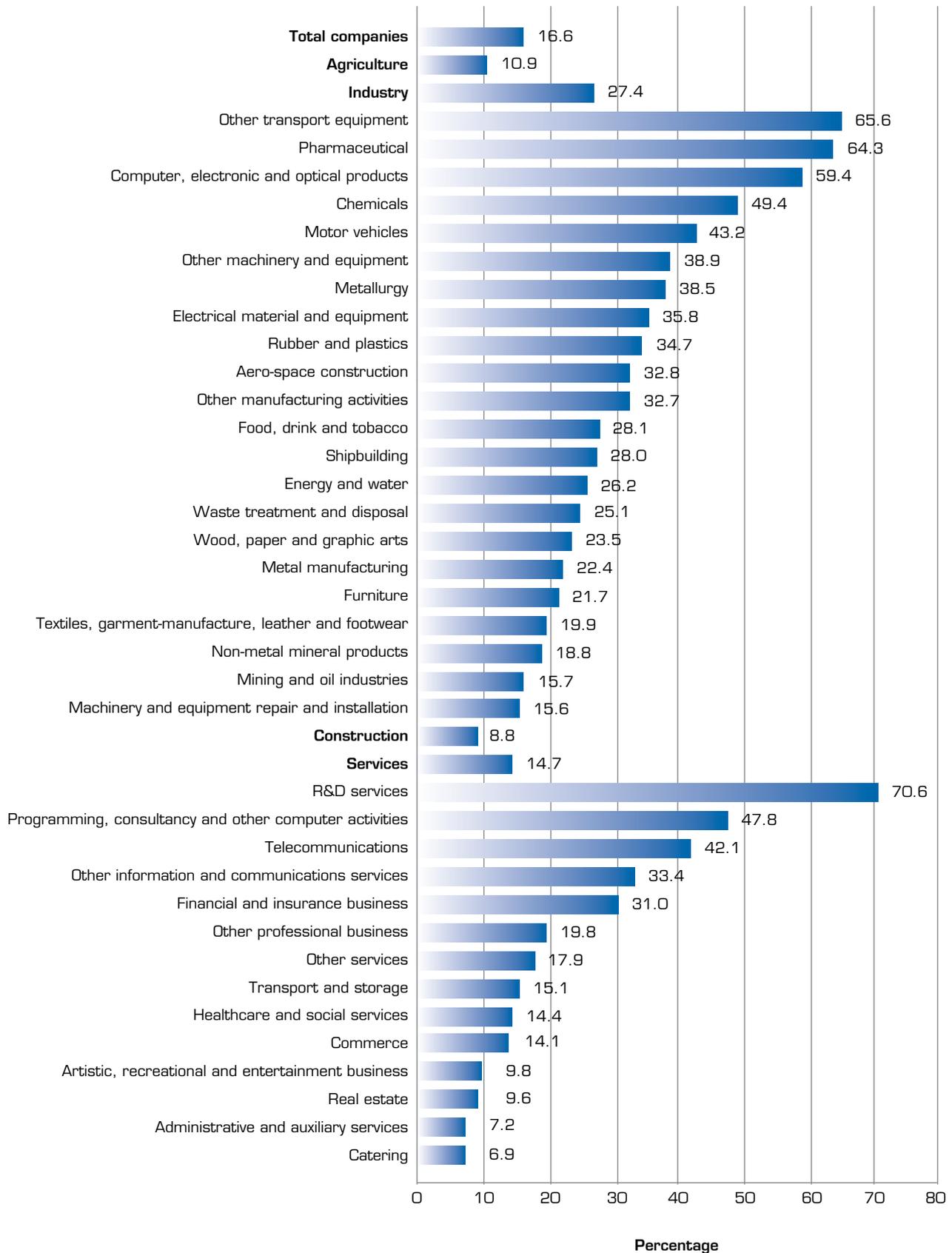
Innovation in other sectors is possible because not all innovation is technological. Innovation also takes place in organization and marketing, a sector where companies with less than 250 employees play a leading role (see Table 11). According to the National Statistics Institute (Instituto Nacional de Estadística (INE))<sup>9</sup>, 20.5% of Spanish companies with ten or more employees implemented organisational or marketing innovations between 2010 and 2012. Among the non-technological innovations, 16.9% of all companies made organisational innovations during the period, either to improve the quality of their goods or services (56.8%) or to cut response time (52%). 11.2% of all companies introduced marketing innovations to improve their market shares (48.1%).

## Success case studies in innovation

In an innovation-based economy, applying innovation in all sectors is not only possible, but vital for success. This multi-sector innovation can be demonstrated with real success stories, thus fostering the virtuous

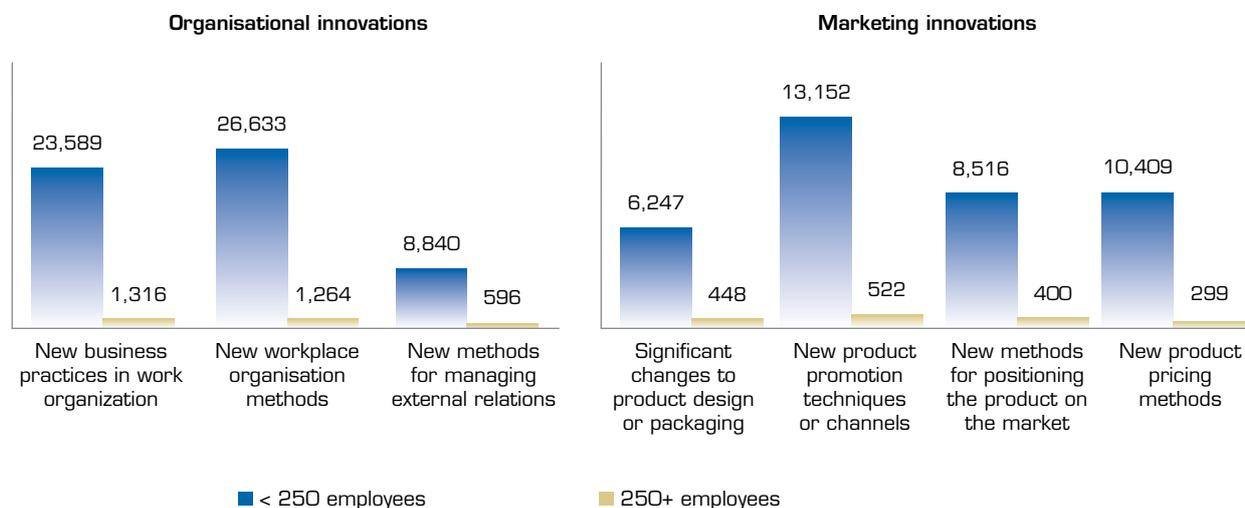
<sup>9</sup> INE (2013): *Survey on innovation in business. 2012.*

Table 10. Innovative companies as a percentage of total in each sector (2009-2011)



Source: Cotec (2013).

Table 11. **Companies with non-technological innovations by innovation type and company size (2011)**



Source: FECYT (2013).

cycle of continuing innovating to continue improving:

- Innovation in new products and business models.** A family firm which is a world leader in quartz surfaces managed to achieve 65% of its (€400m) turnover on the international market, due not only to the development of new products, but also to innovation in its marketing model. The new business model was based on a profound understanding of its customers, good positioning of products and services, enlargement of promotion channels and on focusing resources in channels, products and services which offered the greatest potential for the company.
- Innovation in the public sector.** Innovation in a health service has led to the implementation of better direct and online care services, more communication channels with the patient, unification of medical records and an improvement in socio-health services. The innovation consisted of savings by way of digital

radiography, digitisation of medical records (staff time) and centralised purchases. Collaboration between government, providers and consultants was of key importance, offering an example of an efficient ecosystem for innovation.

- Innovation in the value chain.** A recently-created (2009) steel firm has integrated its entire value chain following a process of innovation. This has enabled it to have a single offer tailored to customers' needs and, at the same time, to reduce costs and cut delivery times as compared to the competition, leading to a constant increase in new customers and markets. In order to offer comprehensive solutions, it has developed a management model that simplifies the supply chain. In achieving this, it was essential to have a partner capable of contributing an international vision.
- Innovation in operations.** A large financial firm integrated its telecommunications services and digitised its bank operations,

with two major benefits: on the one hand, it improved its relationship with customers by way of greater proximity and increased security through the virtual office and its banking-boutique and by making it easier to contract using the biometric signature and new forms of payment; at the same time, it improved the systems of support for decision-making at all levels (board, financial consultants and customers) by modelling business intelligence data, real-time analysis of information and data analysis systems without the need for technical knowledge.

- **International innovation.** A cosmetics multinational increased sales to China by designing a framework application for distributing product information over sales staff's mobile devices. The app offered sales staff immediate access to the latest version of its products (description, prices, training material, etc.).

**Innovation has situated Spain as a world leader in leading-edge industries such as renewable energy, high speed rail, infrastructures, transport, logistics, finances, safety, ICT and biotechnology**





# Consultancy as a catalyst of innovation

## Consultancy in the innovation ecosystem

Consultancy is committed to society: its ultimate aim is to collaborate in the creation of a developed society that receives better services as a client and a citizen. The wellbeing of a society is based on development that meets its needs, and consultancy can contribute to it.

In the case of innovation, consultancy can offer solutions to the challenges we have seen in the last section: improvement in the level of innovation (by improving SII indicator scores), contribution to the Spain brand and contribution to talent management.

With regard to improvements in the level of innovation in Spain, consultancy can offer a series of solutions for all variables (see Table 12). Its capacity to offer such solutions is partly due to the fact that in certain contexts, consultancy and innovation can be said to be synonymous. Innovation forms part of the DNA

of consulting firms, who invest heavily in innovating their products and services, methodologies and production models.

If we analyse consultancy's contributions to innovation in detail, we can see that they are all based on the need to collaborate to innovate (generating and distributing knowledge, aligning strategy with market needs, opening paths to funding, establishing environments of public-private collaboration and allowing access to new markets), because collaboration favours innovation.

Results show that countries whose companies create collaboration spaces get better performance in innovation (see Table 13). Nearly half of all innovating companies in Finland (an innovation leader) have innovation collaboration agreements (with the EU, the US and China); in Sweden (another innovation leader) and Austria (an innovation follower), the figure rises to nearly 80%. In Spain, in contrast, fewer than 7% of companies have collaboration agreements for innovation.

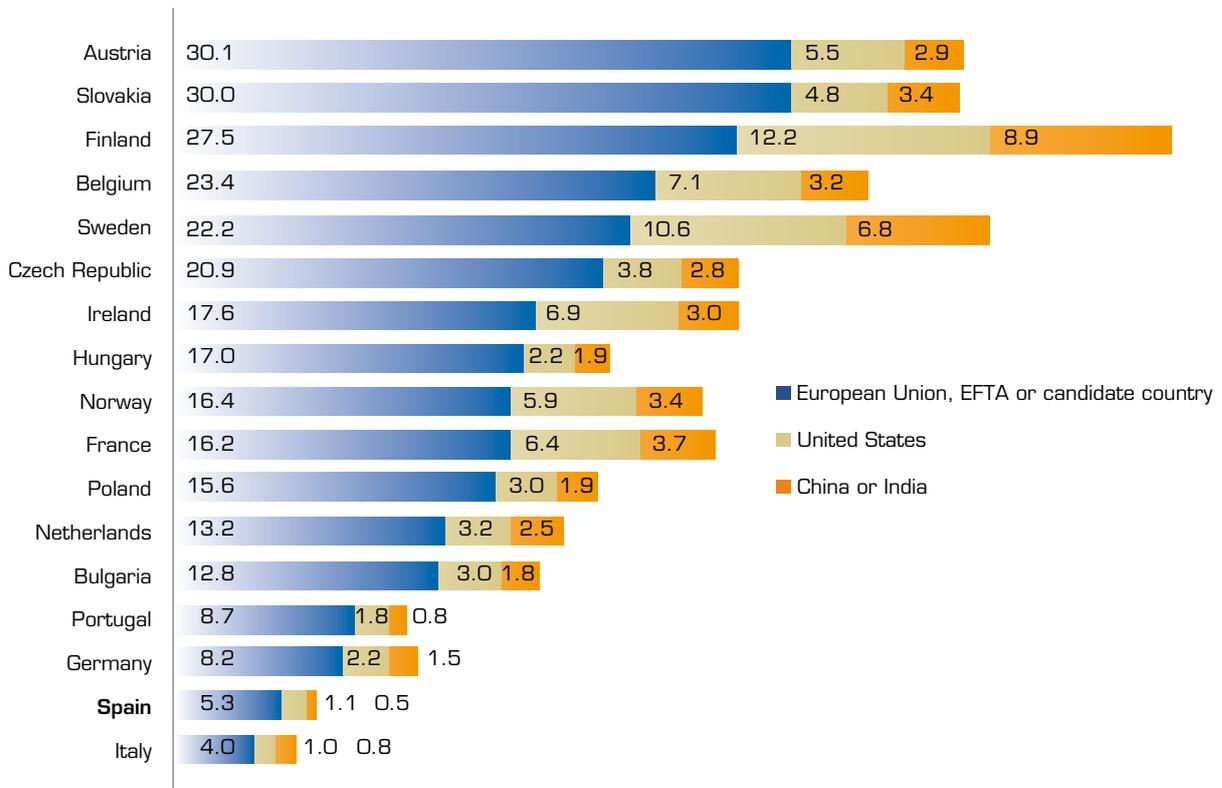


Table 12. **Contributions of consultancy to innovation challenges**

SII INDICATOR		CONTRIBUTIONS OF CONSULTANCY
<b>Enablers</b>	Human resources	<ul style="list-style-type: none"> <li>• Generates and distributes specialist knowledge and experiences</li> <li>• Fosters talent</li> <li>• Aligns knowledge with the needs of companies and the public</li> </ul>
	Open, excellent and attractive research systems	<ul style="list-style-type: none"> <li>• Favours transfer of research (universities, research centres, etc.) to business and society.</li> </ul>
	Finance and support	<ul style="list-style-type: none"> <li>• Brings companies closer to sources of financing</li> </ul>
<b>Firm activities</b>	Firm investments	<ul style="list-style-type: none"> <li>• Opens non cost-intensive paths to innovation</li> <li>• Proposes appropriate allocation of financial resources</li> </ul>
	Linkages & entrepreneurship	<ul style="list-style-type: none"> <li>• Aligns corporate strategy with market reality</li> <li>• Acts as a bridge for knowledge sharing and experiences from different industries and companies</li> <li>• Establishes public-private collaboration environments</li> </ul>
	Intellectual assets	<ul style="list-style-type: none"> <li>• Favours creation of new commercial products through objective knowledge of innovation situation</li> </ul>
<b>Outputs</b>	Innovators	<ul style="list-style-type: none"> <li>• Allows access to new national and international markets</li> </ul>
	Economic effects	<ul style="list-style-type: none"> <li>• Improves measurement and understanding of ROI of innovation</li> </ul>

Source: AEC.

Table 13. **Percentage of innovation companies working in collaboration (2010)**



Source: INE (2013).

It is possible to collaborate with different actors. In Spain, nearly half of all innovating companies have performed some type of collaboration (see Table 14), mainly with providers. These include consultancy firms (47%), followed by universities (37%) and technology centres (34%).

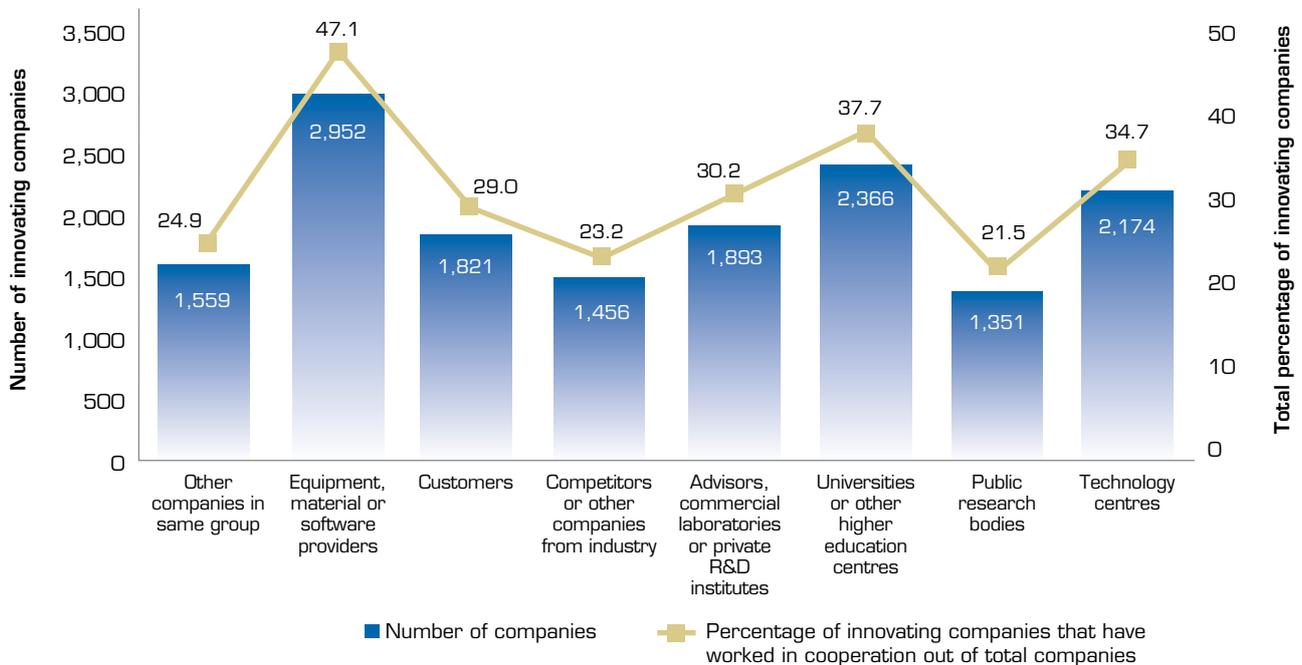
From this perspective of collaborating to innovate, consultancy becomes a catalyst for innovation. It allows business and government to access the innovation ecosystem as a collaborative space in which they can form links with different agents: companies or organisations from the same group, providers, clients, citizens, competitors, private R&D centres, government, universities and technology centres.

Access to this innovation ecosystem provided by consultancy offers the following benefits:

- Access to specialist knowledge.
- Technology and knowledge transfer from research through to innovation.
- Alignment of the innovation strategy with market needs market.
- Objective information on trends in innovation.
- Development of innovating projects with greater certainty and less risk.
- International positioning.
- Access to sources of financing.
- Exploitation and marketing of R&D results.

When we looked at the position of innovation in Spain, we emphasised the importance of

Table 14. Number and percentage of innovating companies that have worked in collaboration, by agent type (2008-2010)



Source: INE (2013).

talent management. We stressed the need to contribute a series of management practices in the areas of talent attraction and retention, development and motivation. Within this innovation ecosystem, consultancy favours talent management by serving as a bridge for accessing specialist profiles and placing them in a collaboration space (see Table 15).

### Consultancy committed to the development of society

Consultancy's contribution to the creation of an innovation ecosystem is crystallised in corporate social responsibility (CSR). In overall terms, consultancy shares the objectives of Marca España and aligns itself with the Spanish Science, Technology and Innovation Strategy 2013-2020 for the greater benefit of society.

Specifically, consultancy transfers its value to society by way of a CSR that promotes the following actions:

- **Collaboration with university and research centres.** Consultancy firms contribute extensive resources to research in universities, research centres and science centres. They foster the creation of specific university chairs in innovation, making it possible to create specialist profiles and bring them into contact with the real world of the projects; innovation incubators, to promote the creation of companies based on RDI activities; and spin-offs from research centres, based on the consultants' business activity.
- **Participation in competitions and prizes.** Organised by consultancy firms

Table 15. **Contributions of consultancy to talent management in organisations**

Attraction and retention	Development	Motivation
<ul style="list-style-type: none"> <li>• External recruitment.</li> <li>• Use of various sources of recruitment.</li> <li>• Risk-taking in staff hiring.</li> <li>• Reduced emphasis on fitting the culture.</li> <li>• Performance-based retention.</li> </ul>	<ul style="list-style-type: none"> <li>• Not limiting performance evaluation to quantifiable criteria.</li> <li>• Not making conformity the predominant standard for evaluation.</li> <li>• Introducing formal systems of aid to performance (e.g., <i>on-the-job training, coaching, etc.</i>).</li> <li>• Implementing non-bureaucratic paths to promotion.</li> </ul>	<ul style="list-style-type: none"> <li>• Provision of workplace autonomy.</li> <li>• Incentives for contributing new ideas.</li> <li>• Non-monetary rewards for contributing new ideas.</li> <li>• Avoidance of excessive wage compression.</li> <li>• Rewarding performance over seniority.</li> <li>• Giving line managers autonomy for talent management.</li> </ul>
<ul style="list-style-type: none"> <li>• Serving as a bridge for companies to access specialist profiles.</li> </ul>	<ul style="list-style-type: none"> <li>• Encouraging performance development (on-the-job training).</li> <li>• Proposing evaluations for performance based on experience in other sectors.</li> </ul>	<ul style="list-style-type: none"> <li>• Favours creation of environments for contributing ideas.</li> <li>• Improving staff performance.</li> </ul>
<b>Contributions of consultancy to talent management practices in organisations</b>		

Source: AEC.

in the area of higher (scientific and technical) education, these are intended to give recognition of the best students, researchers and authors of projects and doctoral theses, with a view to improving their employability. The aim of the competitions and prizes is to grant the resources needed to foster the creation of scientifically and technically-based companies in order to increase the competitiveness of the manufacturing sector.

- **Participation in job-creation programmes.** Consultancy firms form a key element in the creation of qualified employment, putting companies in contact with candidates with the right profile. They collaborate in numerous job-creation programmes with the

Ministry for the Economy and Competitiveness, universities, companies and other tiers of government.

- **Participation in programmes to create new companies.** Consultancy firms work with centres of entrepreneurship, in which staff from consultancy firms contribute their experience and their technical knowledge as part of training or company set-up schemes.
- **Attention to the global challenges of society.** Through specific foundations, they help set up projects related to sustainability, respect for the environment, commitment to the community, attention to underprivileged

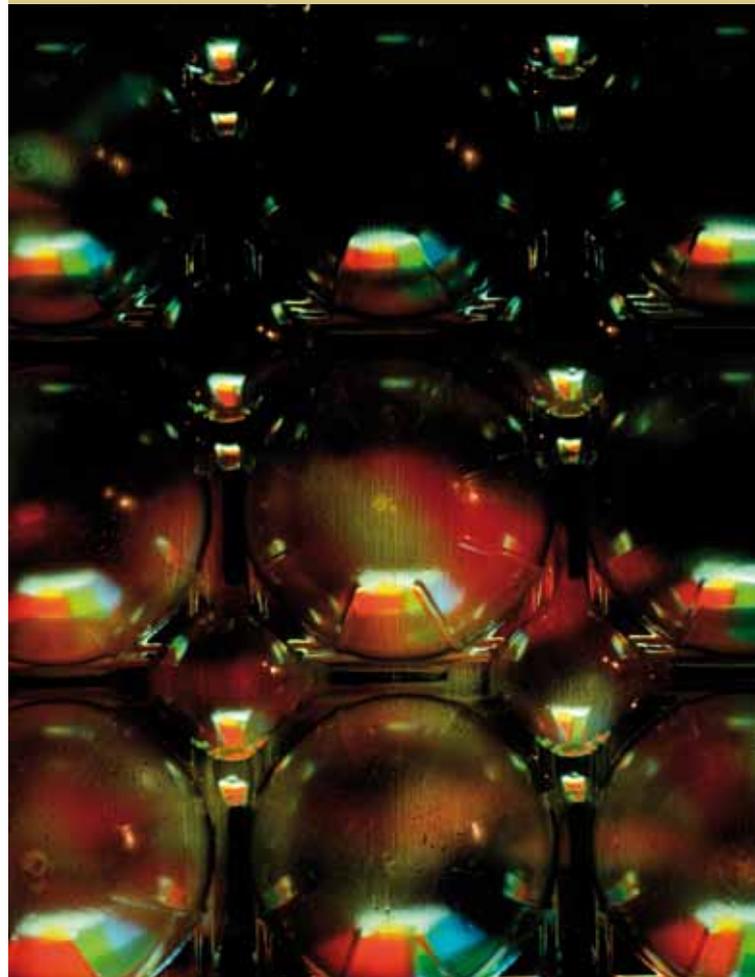
sectors and vocational integration of the most vulnerable groups.

## Technological levers for innovation

Innovation makes the most of new trends, bringing the future closer to create new products or services. Here it is important to observe the wider setting and analyse techniques and tools that have innovating potential. The AEC is watching the following trends in particular, considering them to offer especial potential for innovating<sup>10</sup>:

- **Management and diversity of mobile devices:** development and management of multiple small low-cost devices connected to the Internet that enable an “anything anywhere” vision –related to BYOD (Bring Your Own Device) and with “wearable” technology–.
- **Development of mobile applications:** to create enriched user interfaces with voice and video features allowing more natural connections.
- **The Internet of Things:** networks with low-cost sensors for mass data compiling help decision-making and process optimisation. The Internet of Things can be turned into business models based on management (network optimisation), invoicing (payment by use), operation (remote device operation) and extension (provision of digital services).
- **Cloud services:** delivery of hardware and software over the Internet as scalable on-demand resources using

<sup>10</sup> Gartner (2013): *Gartner Symposium ITxpo 2013. The Top 10 Strategic Technology Trends for 2014.*



## Consultancy firms accompany organisations throughout the innovation process: companies innovate and the consultancy firm acts as their catalyst

private or public clouds for companies and private individuals (personal cloud).

- **Software-defined technologies:** creation of functions based on software instead of hardware (networks, storage, datacentres, manufacture of products defined by software, etc.).
- **3-D printers:** object-creation based on digital designs by printing layers of material.
- **Smart machines:** machines that learn and perform automatic activities and natural user interfaces (voice recognition, response to unstructured questions, smart advice, self-driving vehicles, etc.).

These technologies are structured around four “strengths”: mobility, social networks, cloud orientation and information. As a lever for innovation, application of the technology consists more of combining such strengths (e.g., mobility in cloud services, information based on social networks, etc.) than unitary use of each one.

Consultancy allows organisations to extract the maximum potential from

technology for innovation, acting as facilitators in the following aspects:

- **Access to new technologies.** Consultancy firms bring organisations into contact with suitable technology providers and facilitate the establishment of collaboration agreements. They also allow access to sources of financing linked to specific technological sectors.
- **Access to the right knowledge.** New technologies commonly involve specialist knowledge, which is not always within the scope of every organisation. Consultancy firms facilitate access to specialist knowledge (universities, technology centres, etc.), making it possible to exploit new technologies safely, creatively and faultlessly.
- **Access to specific markets.** New technologies may have specific markets (industry –nanotechnology– environment –renewable energy– municipal authorities –smart city–, health – eHealth–, etc.). Consultancy firms can identify the right market and facilitate access to it through their collaboration networks.

## Infinite possibilities for innovation

Technology is a lever for innovation, but innovation goes beyond technology. Innovation may be solely technological, but proper application commonly consists of management and business models. We need to look beyond pure technology when considering innovation, opening a field with multiple different possibilities:

- **Innovation in management models:**
  - Work organisation: design of new operations processes that reduce

time-to-market, improvement in understanding of new needs, elimination of inventories, flexibility in resource adaptation and elimination of errors.

- Workplace organisation: in order to increase efficiency and reduce waiting, transport and travel times.
- Management of external relations: collaboration agreements with innovation agents and relationship models with customers and users.
- Operational and organisational optimisation: improvement in organisational and management processes.

- **Innovation in business models:**

- New product design or packaging: access to design patents or community design rights, collaboration agreements with creative environments, etc.
- New product pricing methods: cost analysis, market analysis, design of new business models, analysis of financial estimates, understanding of customer and user response, etc.
- New methods for positioning the product on the market: knowledge of competitors, definition of new product attributes, knowledge of needs of customers and users, collaboration with start-ups, etc.
- New product promotion techniques or channels: promotion through social networks, galvanisation of social environments, attraction of new markets (Blue Ocean strategy: attracting the public to a new product; e.g., the Cirque du Soleil has attracted an adult audience to the circus).



**Innovation is born out of talent, and innovating talent is born out the right management practices**



## Consultancy mentors organisations in innovation

Consultancy accompanies organisations throughout the entire creative process of innovation. As we have seen, innovation occurs through the right combination of technology, management models and business models. If an organisation wants to innovate, it needs a process that goes beyond selecting and developing a given technology.

To ensure proper innovation, we need to answer a series of questions about the different pieces making up a new product or service. Using Alex Osterwalder's *Business Model Canvas* as our basis, defining innovation means answering the following questions:

- **Value Proposition:** what new value proposition you want to create.
- **Channel:** what the new channel is and how the demand is to be created.
- **Customers:** what new customers are to be attracted and what customers or users need a new product or service.
- **Building Loyalty:** what new type of relationship the company wants to establish with customers.
- **Revenue:** how profits are to be generated.
- **Key activities:** what activities and processes need to be altered to develop the new service or product.
- **Key resources:** what resources are needed with what knowledge and skills.
- **Partnerships:** whether new partnerships need to be built to access certain technologies, knowledge, markets, etc.
- **Costs:** what the new costs are, what funding is required and how it is to be obtained.

Consultancy for innovation helps create an orchestrated response to all of these questions leading to innovation. It also provides accompaniment throughout the change process involved in creating a new product or service. This process can be broadly divided into the following phases:

- **Preparation of a product or service:** rapidly establishing a product or service that can be marketed. To achieve the necessary speed, it is essential to collaborate with other agents (participation in the innovation ecosystem).
- **Measurement of results:** start marketing immediately via the channels defined in the business model, though not necessarily on a large scale (it is possible to start with only one customer). Consultancy defines the right indicators for monitoring development of the new product or service and measure the results.
- **Learning:** consultancy helps analyse what has happened, highlighting what has worked and what has not. Anything that hasn't worked is rejected and the company continues with what has worked (even if this is merely a residual aspect of the product or service initially planned).
- **Evolution:** based on the previous analysis, the product or service is evolved as far as necessary towards the one that showed good results. Consultancy then applies its knowledge and its integration with other agents to develop a modified product or service.

For all of these reasons, consultancy acts as a strategic partner for

businesses and government, due to its capacity to act mentor transformation and support success in implementing the changes that are always required in innovation.

## Consultancy, essential for identifying the ROI of innovation

One of the challenges facing organisations is to now to obtain tangible results from their innovating projects. Quantifying economic return is not a simple task; it is not always simple to establish a direct or immediate link between a given innovation project and changes in economic indicators: the relationship may be indirect or the results may not be visible for some years. Nonetheless, we need to show whether the innovation is profitable and need to know how to demonstrate this.

The result of the innovation can affect different components in an organisation. In order take into account all the possible dimensions, we can use Kaplan and Norton's concept of the Balanced Scorecard or BSC. Based on our experience in innovation projects, we can give an indication of possible targets

**Companies hiring innovation consultancy services achieved an average return of €7.70 for every euro invested**

## Not innovating is no longer an option; it means standing still

impacted by a given innovation project (see Table 16). In a BSC, all the targets are connected, especially if these are read upwards: improvement in learning leads to an improvement in the core processes, which in turn improves customer relations, leading to better financial results. The innovation may also directly affect any of the targets. We can then see whether the benefits of the

innovation have a positive and quantifiable effect on all aspects of the organisation.

In order to calculate the quantified value of an innovation, it is important to have expert knowledge. Here, consultancy firms can play a dual role:

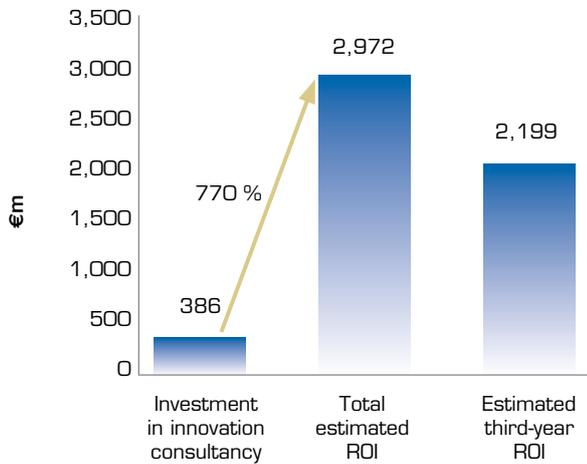
- Firstly, in determining what target (within a BSC, for example) may be affected by an innovation project, depending on the type of innovation, the strategy and the organisation's (economic or social) objectives. This allows us to determine which business areas it will be helpful to invest in.
- We can then define and measure the most suitable Key Performance Indicators

Table 16. Possible goals affected by an innovation project

<b>Financial</b>	<ul style="list-style-type: none"> <li>• Increase in margin</li> <li>• Increase or maintenance of market share</li> <li>• Reduction in costs</li> <li>• Improvement in productivity</li> </ul>
<b>Clients/users</b>	<ul style="list-style-type: none"> <li>• Measuring customer satisfaction</li> <li>• Increase in customer/user loyalty</li> </ul>
<b>Internal business processes</b>	<ul style="list-style-type: none"> <li>• Improvement in quality</li> <li>• Personalization of products/services</li> <li>• Diversification of products/services</li> <li>• Differentiation of products/services</li> <li>• Improvement in efficiency</li> <li>• Improvement in <i>time-to-market</i></li> </ul>
<b>Learning and growth</b>	<ul style="list-style-type: none"> <li>• Increase in motivation</li> <li>• Increase in knowledge</li> <li>• Increase in employee satisfaction</li> </ul>

Source: AEC.

Table 17. Possible goals affected by an innovation project



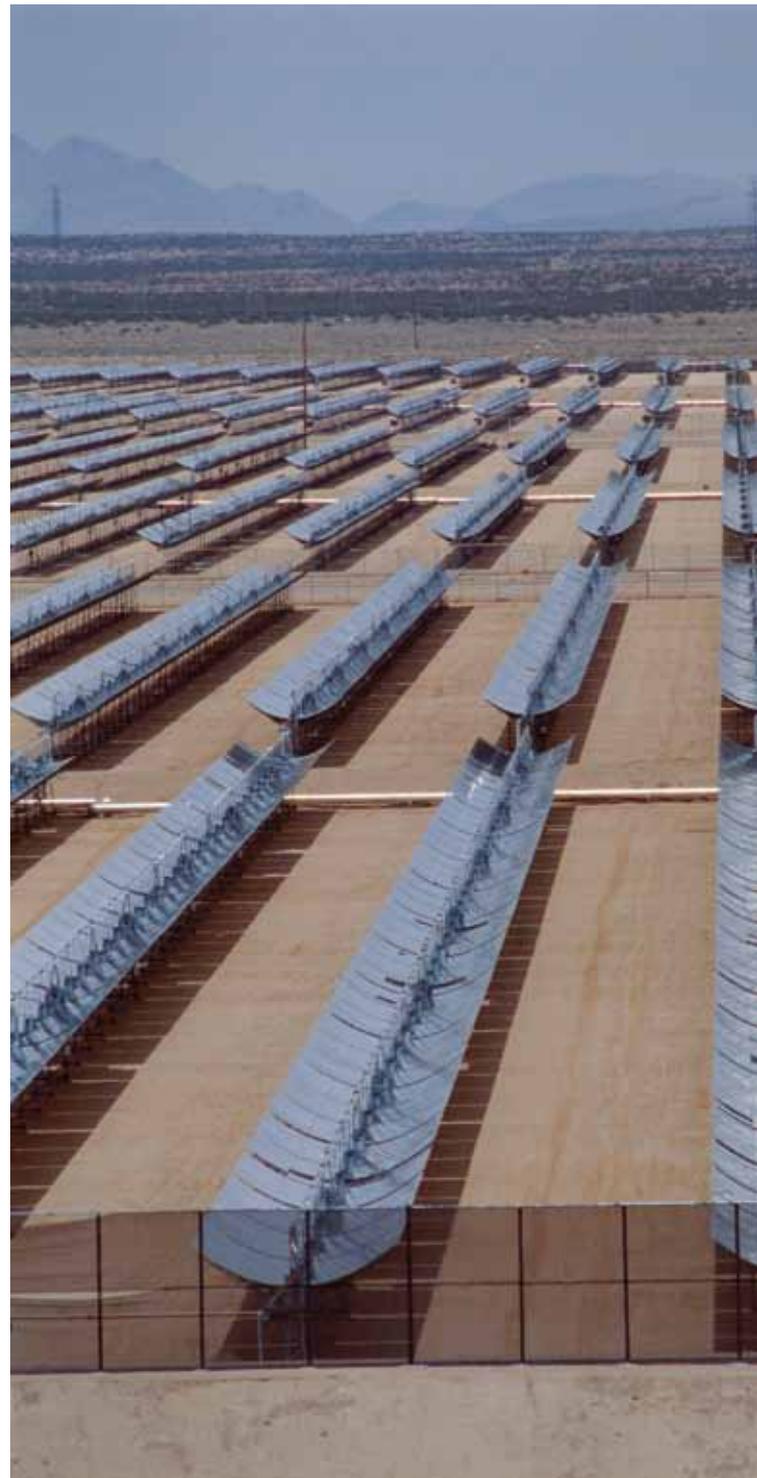
Source: AEC.

(KPIs) to establish realist, quantifiable and measurable targets.

When it comes to determining the economic return on a specific innovation, the following figures, based on the experience of past years, show that hiring innovation consultancy is the best way of obtaining a tangible ROI (see Table 17):

- Companies hiring innovation consultancy services achieved an average rate of return of €7.7 for each euro invested.
- Of this ROI, 74% was obtained in the first three years from completion of the projects.
- 86% of ROI was generated from reduced operating costs, as compared to 14% from increased earnings.

**44% of firms give cost as a reason for not innovating**





# Innovating is the essence of success

We operate in an economy in which innovation is vital. The degree and type of innovation will depend on each industry, but in all cases, innovation is a key part of development and success. Innovation allows an organisation to improve market share, productivity and customer and user satisfaction.

Organisations innovate to achieve that success, and the task of the consultant is to accompany them on that path. To do this,

**Companies that invest in intangible assets obtain the best growth rates, not only in the investment period itself, but also in subsequent years**

consultancy offers the key elements for perfect innovation:

- **Creation of an innovation ecosystem** that favours collaboration between all agents involved. Thanks to its capillarity in all economic and social sectors and its natural orientation for innovation, consultancy is the perfect link between all agents. The existence of an innovation ecosystem offers the following benefits for organisations:
  - It generates and distributes specialist knowledge and experience.
  - It favours transfer of research (from universities, research centres, etc.) to business and society.
  - It brings companies closer to sources of financing.
  - It aligns innovation strategy with the real market situation.
  - It creates public/private collaboration environments.
  - It favours the creation of new commercial products through objective knowledge of innovation situation.



- It allows access to new national and international markets.
- It improves measurement and understanding of ROI of innovation.
- **Accompaniment throughout the change process:** through a suitable combination of technology, management models and business models as a first step, subsequently completed by its capacity to measure results and to propose new innovation solutions. Consultancy does not leave organisations to stand alone at any time in their innovation process.

With suitable consultancy, organisations no longer have any excuse not to innovate.

Report prepared with the collaboration of Quint.

Quint Wellington Redwood is an independent consultancy firm and global leader in knowledge management and in application of best IT practices for companies.

With head offices in Amsterdam, Quint operates in more than 49 countries on four continents. It concentrates on government and strategy, sourcing and management of services for leading organisations in all sectors.



Quint Wellington Redwood  
Camino de la Zarzuela, 21, 28023 – Madrid  
+34 914 290 584  
<http://www.quintgroup.com/es/>

# AEC members

## accenture

Alto rendimiento. Hecho realidad.

### ACCENTURE

Plaza Pablo Ruiz Picasso, s/n, planta 31  
Torre Picasso  
28020 Madrid  
Tel.: +34 91 596 60 00  
Fax: +34 91 596 66 95  
www.accenture.es

## altran

### ALTRAN

Parque Empresarial Las Mercedes  
Campezo, 1, Edificio 1  
28022 Madrid  
Tel.: +34 91 550 41 00  
www.altran.es

## Atos

### ATOS

Albarracín, 25  
28037 Madrid  
Tel.: +34 91 214 88 00  
Fax: +34 91 754 32 52  
www.es.atos.net

## ayesa

### AYESA

Estadio Olímpico de Sevilla. Torre NO.  
Puerta P. Parque Tecnológico de la Isla  
de la Cartuja  
41092 Sevilla (España)  
Tel.: +34 95 504 36 00  
Fax.: +34 95 504 36 01  
www.ayesa.com

## Bilbomática

### BILBOMÁTICA

O'Donnell, 34, 4.º izquierda  
28009 Madrid  
Tel.: +34 91 578 27 90  
Fax.: +34 91 576 92 00  
www.bilbomatica.es

## Capgemini

CONSULTING. TECHNOLOGY. OUTSOURCING

### CAPGEMINI

Anabel Segura, 14, Edificio Cedro  
28108 Alcobendas - Madrid  
Tel.: +34 91 657 70 00  
Fax: +34 91 661 20 19  
www.es.capgemini.com



### CEGOS ESPAÑA

Fray Bernardino de Sahagún, 24  
28036 Madrid  
Tel.: +34 91 270 50 00  
Fax: +34 91 270 50 01  
www.cegos.es

## connectis

### CONNECTIS ICT SERVICES

Avda. Fuente de la Mora, 3, 5 y 7,  
Edificio A, planta 4  
28050 Madrid  
Tel.: +34 91 556 92 62  
Fax: +34 91 318 56 32  
www.connectis-ict.es

## delaware

forward thinking

### DELAWARE

Edificio Nuestra Señora del Pilar  
Norias, 92, 1.ª planta  
28221 Majadahonda - Madrid  
Tel.: +34 91 658 72 00  
Fax: +34 91 653 31 06  
www.grupodelaware.com

## Deloitte.

### DELOITTE

Plaza Pablo Ruiz Picasso, 1  
Torre Picasso  
28020 Madrid  
Tel.: +34 91 514 50 00  
Fax: +34 91 514 51 80  
www.deloitte.com



an NTT DATA Company

### EVERIS

Avda. de Manoteras, 52  
28050 Madrid  
Tel.: +34 91 572 72 00  
Fax: +34 91 749 00 01  
www.everis.es

## EY

### EY

Building a better  
working world  
Plaza Pablo Ruiz Picasso, 1  
Torre Picasso  
28020 Madrid  
Tel.: +34 91 572 72 00  
Fax: +34 91 572 75 25  
www.ey.com/es



### GFI

Serrano Galvache, 56  
Edificio Encina, planta 7  
28033 Madrid  
Tel.: +34 91 383 63 20  
Fax: +34 91 383 28 65  
www.gfi.es



### HEWLETT-PACKARD COMPANY

Vicente Aleixandre, 1  
28232 Las Rozas (Madrid)  
Tel.: +34 91 602 16 93  
Fax: +34 91 602 16 62  
www.hp.es

## IBM.

### INTERNATIONAL BUSINESS MACHINES, S.A.

Santa Hortensia, 26-28  
28002 Madrid  
Tel.: +34 91 397 66 11  
Fax: +34 91 519 39 87  
www.ibm.com/es/



### INDRA

Avenida de Bruselas, 35  
28108 Alcobendas - Madrid  
Tel.: +34 91 480 50 00  
Fax: +34 91 480 50 80  
www.indracompany.com

## INFORMÁTICA

El Corte Inglés

### INFORMÁTICA EL CORTE INGLÉS, S.A.

Travesía Costa Brava, 4  
28034 Madrid  
Tel.: +34 91 387 47 00  
Fax: +34 91 387 47 76  
www.iecisa.com



### INSA, INGENIERÍA DE SOFTWARE

AVANZADO, S.A.  
Avenida de Burgos, 8A, Edificio Bronce  
28036 Madrid  
Tel.: +34 91 383 40 60  
Fax: +34 91 383 40 90  
www.insags.com

## NEORIS

Practical Visionaries

### NEORIS

María de Portugal, 1, 3-5, Edificio 2  
28050 Madrid  
Tel.: +34 902 538 010  
Fax: +34 902 538 020  
www.neoris.com



### OESÍA

Santa Leonor, 65, Edificios A y B  
28037 Madrid  
Tel.: +34 91 309 86 00  
Fax: +34 91 375 82 16  
www.oesia.com



### PwC

Paseo de la Castellana, 259 B  
28046 Madrid  
Tel.: +34 902 021 111  
Fax: +34 91 568 42 36  
www.pwc.es

## Schneider Electric TELVENT

### IT Consulting and Integration Services

Valgrande, 6  
28108 Alcobendas - Madrid  
Tel.: +34 91 323 69 26  
Fax: +34 91 714 70 05  
http://tvt.schneider-electric.com/ITC

## sopra

### SOPRA GROUP

Avda. de Manoteras, 48  
28050 Madrid  
Tel.: +34 91 112 80 00  
Fax: +34 91 112 84 81  
www.sopragroup.es

## Tecnocom

### TECNOCOM

Josefa Valcárcel, 26  
28027 Madrid  
Tel.: +34 901 900 900  
Fax: +34 91 436 81 51  
www.tecnocom.es

## UNISYS

### UNISYS, S.L.U.

Ramírez de Arellano, 29, 5.ª planta  
Edificio Merrimack II, 28043 Madrid  
Tel.: +34 91 353 58 00  
Fax: +34 91 519 58 10  
www.unisys.es



el valor de hacerlo sencillo

### VASS

Doctor Severo Ochoa, 25, Edificio Fiteni V  
28100 Alcobendas - Madrid  
Tel.: +34 91 622 34 04  
Fax: +34 91 661 68 33  
www.vass.es



Asociación Catalana  
d'Empreses Consultores

### ENTIDAD VINCULADA: ACEC (Asociación

Catalana de Empresas Consultoras)  
Plaça Catalunya, 9  
08002 Barcelona  
Tel.: +34 93 492 57 37  
Fax: +34 93 492 57 01  
www.asocat.org



© AEC, 2014.

All rights reserved.



Spanish Association  
of Consulting Firms

Monte Esquinza, 34, 2.º B, 28010 MADRID • Tel.: +34 91 308 01 61  
E-mail: [consultoras@consultoras.org](mailto:consultoras@consultoras.org)  
[www.consultoras.org](http://www.consultoras.org)

