

A Forrester Consulting Thought Leadership Paper Commissioned By BMC

Exploring Business And IT Friction: Myths And Realities

Significant Gaps And Loss In Productivity Are Challenging The Value, Agility, And Cost Of IT

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FORRESTER

Headquarters | Forrester Research, Inc.
60 Acorn Park Drive, Cambridge, MA 02140 USA
Tel: +1 617.613.6000 | www.forrester.com

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Executive Summary

In today's business environment, outcomes are the ultimate yardstick of success. The collection of processes by which any business succeeds is only relevant in that light.

Most businesses today rely on IT to make a large — even disproportionate — contribution to their performance. In this sense, there are no longer really “IT” companies, as a modern company's business is supported, driven, and enabled by IT on a pervasive basis. Yet in recent years, the availability of new technologies, including cloud and new phenomena such as bring-your-own-service or bring-your-own-device (BYOD), are changing business users' expectations. A perception is building that IT is not keeping up.

One or more IT issues might interrupt a business user's typical day. The type and impact of these interruptions vary and are frustrating for business users. These frustrations cause friction between the business and IT, impairing productivity and diminishing the ability of a business to serve its end customer — all of which result in a negative impact to both sides of the income statement.

Against this backdrop of friction and loss, we have found significant gaps between what the business user experiences and what IT believes that its business users experience. This gap causes great frustrations to both sides, bleeding off energy and forward momentum and causing tremendous and measurable loss to the company via both hard and soft impairments.

In December 2012, BMC commissioned Forrester Consulting to help it better understand the gaps and frictions that currently exist between the business and IT when it comes to the ability of the enterprise IT consumer to do his or her job. To do this, Forrester surveyed 900 IT business users and 900 IT service providers around the world.

Forrester found that, in order to ensure business employees' productivity, it's critical for IT organizations to change their customers' experiences to avoid unnecessary and costly productivity and customer satisfaction issues with their business partners. Forrester found that these companies suffered significant loss in productivity due to IT's inability to support and help and that there is a wide gap in customer satisfaction between what the business perceives and what IT perceives.

Key Findings

Forrester's study yielded three key findings:

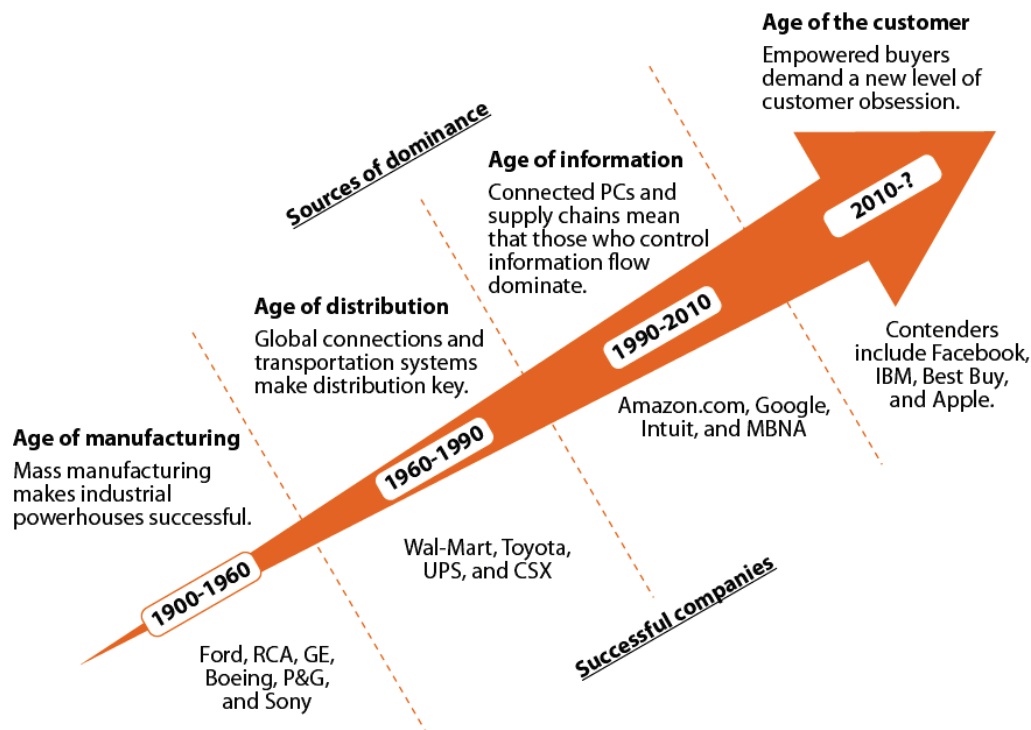
- **There are significant gaps in customer satisfaction . . .** looking at customer experience from the business side and the IT side, we found significant gaps in customer satisfaction. Business users are not as satisfied with the services IT delivers, whereas IT thinks they are doing pretty well. This means that IT organizations need to get real about their customers' experience — and actively improve it.
- **. . . which have a severe impact on business productivity.** Business users at all types and sizes of organizations in all geographies are experiencing severe productivity losses, ranging from 10% (a few hours per month) to more than 50%. In other words, companies are losing money because their people can't work. IT organizations need to beef up their service support and delivery activities to ensure minimum impact to their clients: the end users.

- **Ownership of customer experience is in the hands of both IT and its business customers.** IT has implemented a variety of improvements, but these are typically technology-driven and do not address the expectations of the business. Business users are reaching out to IT for help — but just as many are trying to solve their own problems or getting help from somewhere else. Both organizations have to transform: IT needs to innovate customer experience with technology rather than through technology. Business teams need to understand what IT can do to support and innovate — which can only be accomplished through conversations, discussions, and agreements. IT and business owners need to agree on service levels to avoid loss of productivity and gaps in expectations.

The Importance Of Customer Satisfaction

In today's world, business touches the world through IT. The IT organization, and particularly the groups that run, support, manage, and maintain the technology that supports business processes and business services, are critical to the successes and competitiveness of the business. One simple example is email: IT is used for interactions between the business and the outside world and IT supports the sale of products over the Internet. In the age of the customer, new companies exploit available innovations to emerge as new players. This has happened many times over past decades; new players emerge and old players languish, with the key differentiator being the ability to embrace and exploit available innovations (see Figure 1). In today's world, IT facilitates the interaction between the business and the outside world through its ability to operate the business.

The important point is that IT and its providers cannot be separated from the operations of most businesses. Business customers, users, and managers who rely on IT to provide information access, ensure that business applications are available and perform well, and respond quickly to issues hold one view in common: that the IT group should share the urgency of the business need. If this is not the case, friction between the two organizations can occur. Friction between the business and IT typically occurs when the IT organization doesn't meet its business users' expectations.

Figure 1**The Age Of The Customer**

Source: "Competitive Strategy In The Age Of The Customer," Forrester Research, Inc., June 6, 2011

IT organizations are trying to measure business/IT friction through customer surveys. Three-quarters (74%) of the organizations we surveyed conduct customer surveys on a regular basis. Customer satisfaction surveys are undeniably important, as they allow IT departments to understand how their internal customers see them. At the same time, these surveys allow business users to express their level of satisfaction with their IT department. The challenge with many customer surveys is that they might not really reflect the true business/IT friction — due to the surveys' response rates, timeliness of responses, questions asked, and the target audience. Even worse, in some cases the IT organization might be asking business users for their customer satisfaction, but not taking corrective actions afterward. 18% of the IT service provider survey respondents said that they either didn't know what to do with survey data or just didn't do much with it.

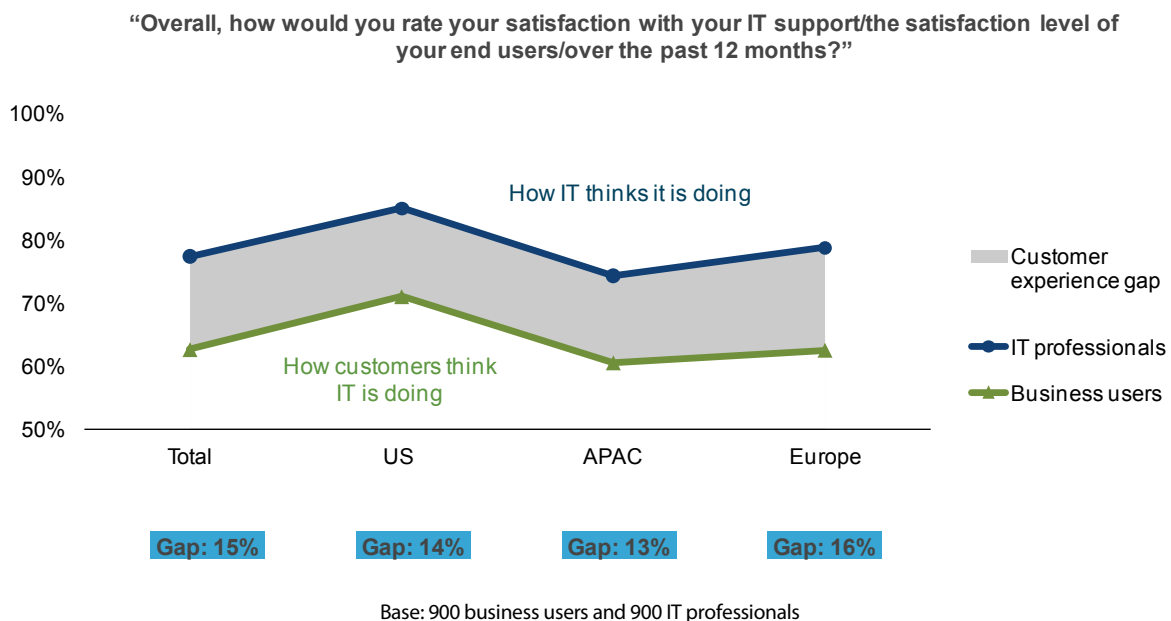
Business And IT Have Different Views On IT's Ability To Deliver Services

Most IT organizations collect a huge amount of data about their organizations in addition to customer surveys. Metrics like call volume, average hold time, and completion rate are just a few ways of measuring the front-end efficiency of an IT organization in supporting the requests and concerns of their business users. These metrics are all helpful to continuously improve and streamline IT processes, but they don't measure the real experience as perceived by their

customers or business users. Our survey asked 900 business users about their customer satisfaction and 900 IT pros about what they thought they delivered from a customer experience standpoint. We found that, across the regions we surveyed, there's a large gap between how the business thinks about IT and how IT thinks about itself. The difference ranges from 13% to 16%, depending on region (see Figure 2).

Figure 2

The Customer Experience Gap



Source: A commissioned study conducted by Forrester Consulting on behalf of BMC, January 2013

This customer experience gap is a huge challenge for today's organizations relative to the impact on business user productivity, but could become a greater issue if not addressed immediately. There are a variety of trends that are important to recognize, as they will widen this customer experience gap if not dealt with:

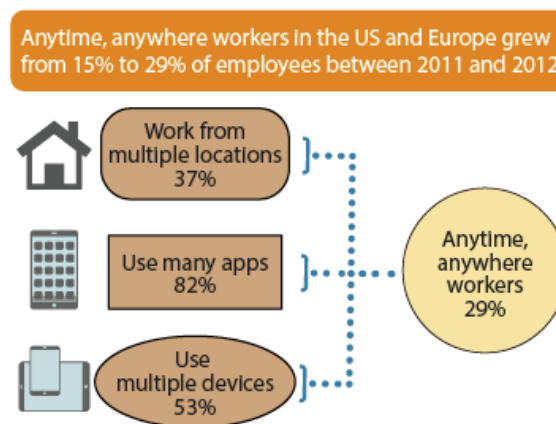
- Customer experience as a priority.** In the age of the customer, the most important focus for business users is that the end customer matters more than any other strategic imperative. As IT supports the business in almost all interactions with the customer, the business' customer passion should also be very important for IT. Ultimately, if business users are not able to pursue their tasks, it can reflect negatively on the reputation and profitability of the entire company.
- The consumerization of IT.** This is the phenomenon of employees using devices, applications, and web services to actually empower business users or employees to innovate. Collaboration tools help people to connect and solve problems. Consumerization will only rise with the ever-expanding arrival of new devices, new strategies such as BYOD, and the ongoing interest in applications on demand. Business users range from executives, consultants, and sales executives to administrative assistants, telesales staff, and call center representatives. Their

opportunity to leverage consumerized offerings — those offered outside of IT — varies depending on the IT organizations' policies and openness.

- **Workforce technology adoption.** Technology tools and services that make employees productive and successful at work are called “workforce technologies.” These technologies range from mobile devices such as smartphones (42% of global information workers use them every day) and tablets (6% use them every day) to laptops (61% use them every day) and desktops (88% use them every day).¹ The fastest growth is around tablets and smartphones.
- **Mobile workers.** Working outside the office means that workers need to have more gadgets and rely on advanced collaboration tools to stay in touch with their fellow employees in the office. Forrester data shows that 39% of employees in North America work from home more than once per month. In Europe, this number is about 25%; in Asia Pacific it's 42%. We expect this trend to continue (see Figure 3).
- **Continuous challenges around new and old technologies.** When we asked what kinds of issues business users reached out to IT to get help on, 34% of all respondents indicated that they reached out for network support, 40% for support on custom applications, and 44% for new device setup.

Figure 3

Mobile Devices Mean Anytime, Anywhere Workers



Base: 4,938 US and European information workers

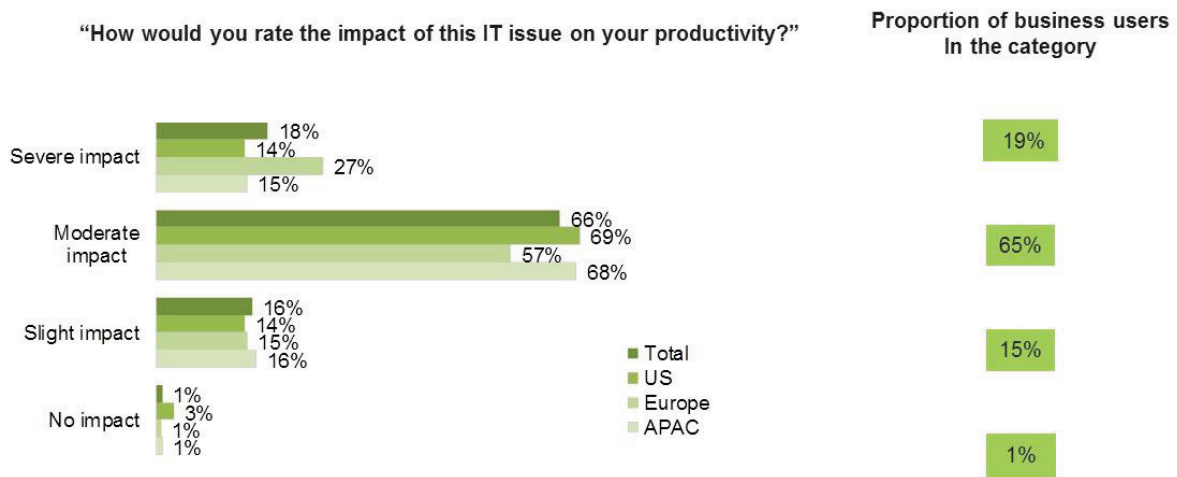
Source: “2013 Mobile Workforce Adoption Trends,” Forrester Research, Inc., February 4, 2013

None of these trends will ease the burden of reducing the customer experience gap for IT. The narrowing of this gap, however, also has significant impact on the bottom line of a business and will result in efficiency improvements for these business users.

Business Impact Cost Will Catalyze IT Service Reinvention (Or Revolution)

Nearly all of the respondents surveyed have experienced loss of productivity. In fact, 46% of business users worldwide lose at least 10% of their productivity per month and 32% lose 10% to 25% of their productivity due to IT issues. When asked about the impact of the loss in productivity, of those who lost about 10% per month, 19% reported that the impact was severe — meaning that they could not do their job and there was no workaround possible (see Figure 4). While productivity issues have the most critical impact on the business, other frustrations include the inability to reach their service desk (49%) and the inability of IT to understand business users’ “role view” (33%) — that is, their roles, equipment, access rights, etc. Both of these cause delays in getting the business user back to his or her task. Finally, 33% of respondents stated that the service desk lacked skills (see Figure 5).

Figure 4
One In Five Business Users Who Lose At Least 10% Of Their Productivity Were Severely Affected

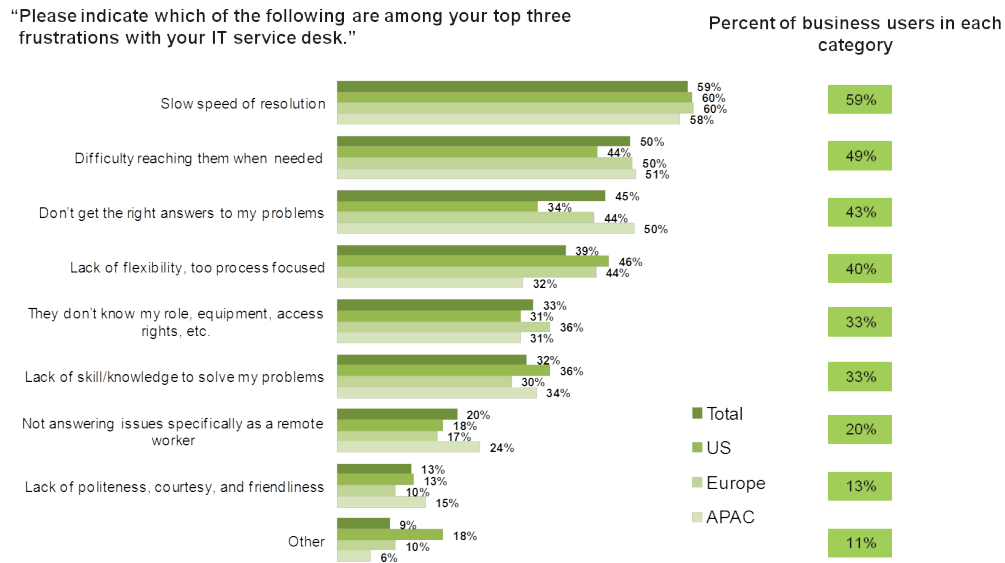


Base: 900 business users
(percentages may not total 100 because of rounding)

Source: A commissioned study conducted by Forrester Consulting on behalf of BMC, January 2013

Figure 5

One In Three Business Users Say That Their IT Service Desk Lacks The Skills Or Knowledge To Solve Their Problems



Base: 900 business users
(multiple responses accepted)

Source: A commissioned study conducted by Forrester Consulting on behalf of BMC, January 2013

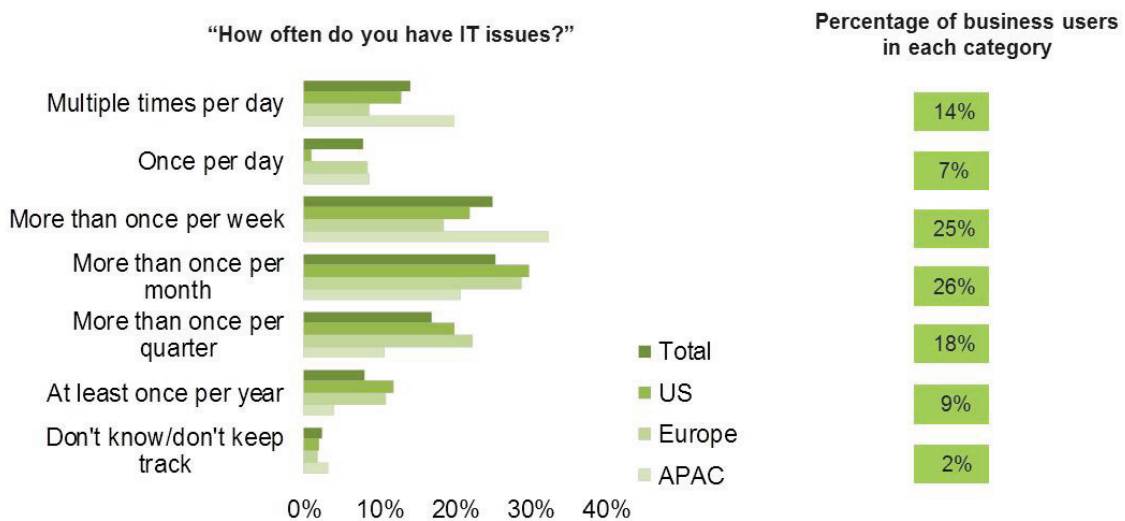
IT Friction Comes At A Cost That Businesses Can't Afford

Companies employ hundreds of thousands of workers, all with their own tasks and projects that help the company succeed in its mission and purpose. In today's connected world, there are mobile workers, semimobile workers, and office workers, all of whom have a variety of things in common:

- The majority of their service requests go to the service desk.** IT organizations have continuously educated their business users to connect with their service desk for assistance and support. The good news is that the majority of our survey participants have been listening. In fact, 94% of the respondents connect to the service desk. The situation during business hours was slightly different: just 49% of respondents experiencing problems with desktops, laptops, mobile devices, or printers during normal business hours would connect with the service desk, while 46% would either investigate and resolve the problem without company IT resources or would ask a colleague for help or tips.
- Many business users experience IT issues daily.** Business users' challenges range from network issues to password resets. The frequency of issues varies, but the fact is that 14% reported IT issues at least once per day (see Figure 6).

- Many business users cannot be productive due to IT issues.** The productivity impact is a huge challenge for many business users. IT distractions can range from those that severely affect productivity (where a business user could not do the job or there was no workaround possible), to those that moderately affect productivity (where the user could do part of the job or there was a workaround), to those that slightly impaired productivity (where the user could do the job and there was very little workaround) to no impact (where the user could work around it). A vast majority (84%) of surveyed business users experienced a severe or moderate impact on their ability to be productive on a monthly basis.

Figure 6
Time Lost Due To IT Issues By Region



Base: 900 business users
(percentages may not total 100 because of rounding)

Source: A commissioned study conducted by Forrester Consulting on behalf of BMC, January 2013

To put the impact of these lost hours into a financial context, Forrester performed a directional calculation to demonstrate the average cost of lost productivity due to IT issues. Forrester began with data from each surveyed country, where respondents identified the amount of time per month they lost to IT issues (see Figure 7 and see Figure 8).

Figure 7

Time Lost By Country Due To IT Issues

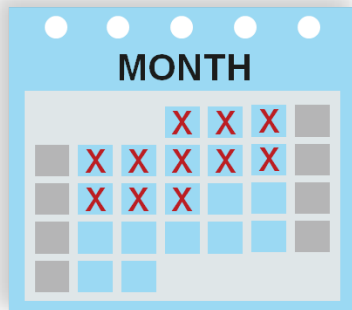
Amount of productivity lost per month	US	Singapore	India	Hong Kong	Australia	Germany	France	UK	Italy	
80 to 160 hours	6%	7%	2%	5%	3%	0%	4%	0%	1%	High Impact Avg 90 hours Per month
42 to >80 hours	7%	20%	14%	14%	3%	7%	9%	5%	15%	
16 to >42 hours	22%	40%	43%	46%	33%	32%	24%	26%	26%	Moderate Impact Avg 18 hours Per month
>2 to >16 hours	65%	33%	39%	35%	61%	59%	63%	69%	56%	
I don't know	0%	0%	2%	0%	0%	2%	0%	0%	2%	

Base: 900 business users

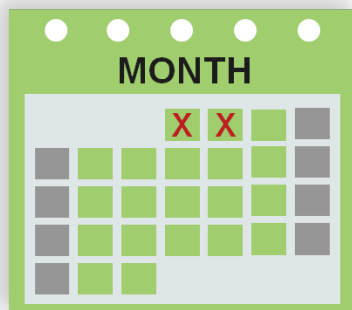
Source: A commissioned study conducted by Forrester Consulting on behalf of BMC, January 2013

Figure 8

Time Lost Overall Due To IT Issues



An average of **14%** of global business users we surveyed reported losing an average of **90** hours a month due to IT issues.



An average of **86%** of global business users we surveyed reported losing an average of **18** hours a month due to IT issues.

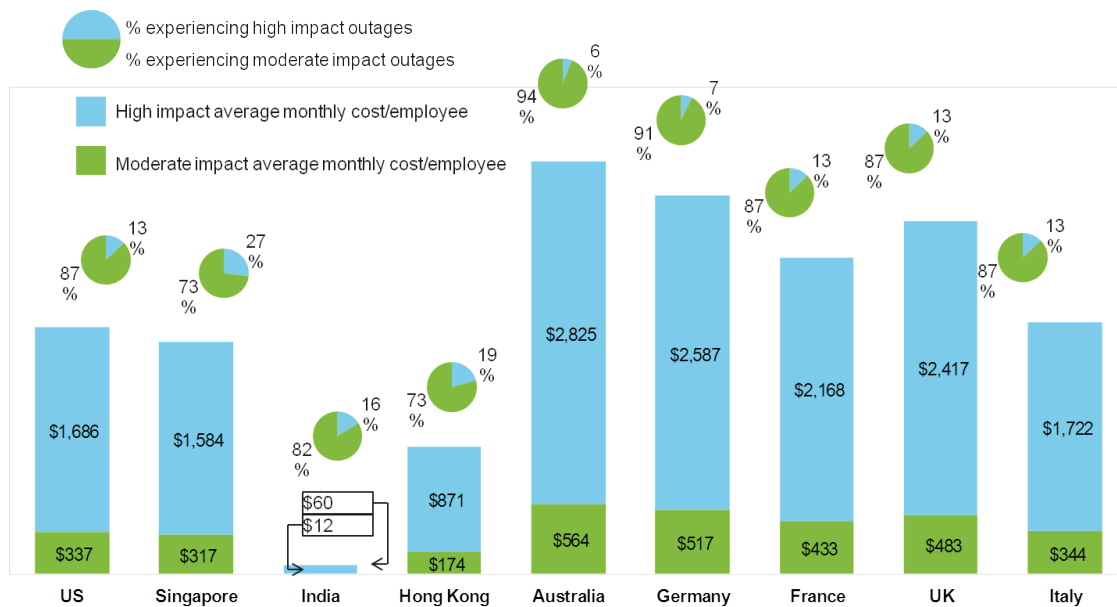
Base: 900 business users

Source: A commissioned study conducted by Forrester Consulting on behalf of BMC, January 2013

To create a figure for average cost per employee per month, Forrester first created two categories for the degree of IT issues: “moderate-impact loss” (those that experience loss of productivity of up to 25% of their time) and “high-impact loss” (those that result in a 25% or greater loss of productivity).

Forrester then used governmental sources to calculate the average hourly salary of employees for each country surveyed for this report.² Finally, Forrester combined these two calculations to derive an average cost of moderate-impact losses and high-impact losses per employee per month. Figure 9 shows the calculated costs using this method, along with the percentage of each country that falls within the range for each category. Please note that these results are directional in nature and intended to provide context to the cost of the IT issues at the focus of our study.

Figure 9
Monthly Cost Of Lost Productivity Per Country Surveyed



Base: 900 business users

Source: A commissioned study conducted by Forrester Consulting on behalf of BMC, January 2013³

Bear in mind that the cost of IT friction is not just for the business user, but is also felt on the IT side; IT also incurs costs from this friction. IT organizations are staffed to support a number of incidents ranging from less than 100 per month in small organizations to 50,000 or more per month in large organizations. The cost of tickets varies depending on which level within IT resolves the issue. The cost of a level one ticket currently averages \$10 to \$21; at level two, it

can go up to \$35; and the cost of an incident being resolved at level three can start at \$100 and go up from there.⁴ Of course, much of this can vary depending on the environment, the skills within the different levels, escalation rates, the complexity of the problems, and many other factors.

Build A Model To Show That Business User Experience Affects The Bottom Line

To calculate the monthly impact on productivity, Forrester took average income data in each country and multiplied it by the average range of time that each country's business users reported that they lost productivity due to an IT disruption. The previous models capture the relationship between customer experience and the cost of loss of productivity for companies. IT organizations and business groups that need to make the case for improving IT customer experience should customize these models to estimate the upside for their own firm. To do that:

- **Plug in your actual numbers.** To really provide good details around your business users' loss in productivity, leverage your own company's average range of incomes. It might also be possible to leverage specific income data for a specific set of business users relative to their role and function within an organization.
- **Include cost savings to complete the picture.** The loss of a business user's productivity is calculated using a baseline of the average income of the individual and the individual country or region. To complete the picture, it makes sense to add any additional cost impacts that your organization experiences. This could be the impact on end customers, partners, or vendors who might be affected due to the inability of the business users to perform their jobs.
- **Wrap the numbers in a compelling story.** Present the findings in a compelling story to management on both the IT and the business side. A compelling business case typically combines financial details like loss of business user productivity. However, personal experiences and stories that describe business user frustrations also add great value and personalize the situation. And absolute numbers on the total number of users affected create a sense of urgency and impact.
- **Be conservative in your conversion of time savings to financial impact.** Building into your calculations an expectation of how much time savings really translates to productive time can go a long way toward increasing credibility around your estimates.

Reframing Business And IT Friction Through Service Levels

No single person is responsible for business users' customer experience. Rather, a complex set of relationships among members of the IT organization, partners, and service providers determines the quality of all interactions. The business users' experience relies on the entire IT ecosystem. IT organizations put much of their effort into using technology for streamlining and automation and forget the actual user or consumer of the service. 39% of all business users said that IT lacks flexibility and is too process-focused. Automating processes such as self-help might be good technology innovations, but IT needs to provide agility and choice to its users. In order to align the needs of all business users, IT

should implement innovation with technology by matching customer experiences to business needs — and this starts with the painful journey of listening to, communicating with, and connecting with the business user. This connection will result in a service-level agreement (SLA) that clearly describes the expectations and abilities of both sides.

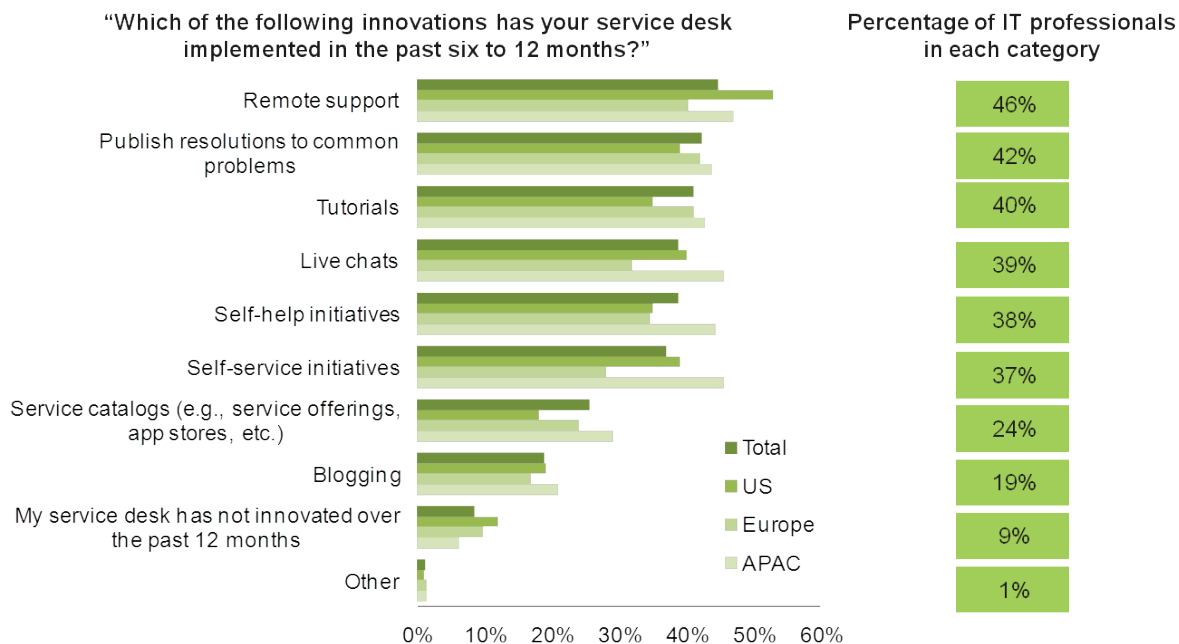
Unfortunately, only 12% of the respondents from the business group indicated that an SLA existed that described quality, level, and service expectations with their IT organization. Having SLAs in place and managing expectations and abilities to deliver these services is one critical key point to eliminating business and IT friction. A good customer experience management activity for IT will include SLAs and will not only reveal opportunities for innovation but also make behind-the-scenes players like operation centers, technical specialists, and other members of the IT value chain aware of how they can influence and support their business users' experience in a positive way and make their company as a whole more competitive in today's economy.

IT's Ability To Shift Customer Experience Through Automation

IT organizations have invested in improving their customer experience by introducing a variety of innovations. Many of these innovations involve automation (which allows a combination of initiatives focused on how to reach IT); another set of improvements focuses on how IT can be more effective in supporting its business users. From the study, we found that there are significant efforts around the enablement of the business user. 42% of IT pros indicated that they had published resolutions in the past six to 12 months to help their customers help themselves (see Figure 10). Additional innovations, such as self-help and the implementation of a service catalog, provide benefits to both business and IT. Through self-service and service catalogs, the business has much greater flexibility and agility in reaching IT, while at the same time IT can reduce its costs by allowing the left-shifting of “getting help and service” to the service consumer. And last, through a good service catalog, IT can align its offerings to the real demands and needs of its business users. Automation can be implemented via three different paths:

- **Task automation.** This type of automation is usually around a specific task or well-defined function that can be performed via a specific tool. Examples are the automation of logging a service request. These are tools that take a specific, well-defined function and perform it, usually with no human interaction required.
- **Process automation.** Process automation typically connects a variety of tasks in the right sequence and facilitates decisions to take action, steer the workflow in different directions, and enable feedback loops. Typically, the flow of an automated process is enforced and accelerated by process flow tools. Examples for process automation would be automatic password resets at the request of a user.
- **Decision-making automation.** This form of automation usually consists of either some kind of analytics that determine why an action is performed or what type of decision-making is required before the next step of the automation process can proceed. An example could be the provisioning of a particular asset upon the approval of a budget owner.

Figure 10
 IT Organizations Have Already Taken Many Steps To Improve Business User Experience



Base: 900 IT professionals

Source: A commissioned study conducted by Forrester Consulting on behalf of BMC, January 2013

Our survey shows a variety of automations — task, process, and decision — that many IT organizations have already applied with the intent of improving their business users’ experience while providing agility, choice, and value. These range from self-help, self-service initiatives to the introduction of live chat. Many of these innovations were introduced in the past six to 12 months.

IT Organizations With Passion For And Actions Around Customer Experience Will Lead The Service Revolution

A growing number of companies are optimizing their IT customer experience efforts as they proactively listen, intercept, respond to, and take action on IT customer experience, thereby reducing existing friction and gaps. These companies will be the leaders in service management as they focus their efforts on service management activities that affect return on investment (ROI) and customer productivity and positive customer experience. Ideally, a formal IT customer experience initiative would have the following components:

- **Customer surveys.** These are required to establish the requirements for change and confirm successful change implementation as the loop is reiterated for CSI.

- **Service-level agreements.** These establish agreed-upon service definitions and benchmarks for measuring specific service delivery metrics but do not mean the delivery mechanism improves customer satisfaction.
- **Automate to improve service delivery and to left-shift.** This addresses both repeatable SLA achievement and shifting of tasks, processes, or even decisions across the entire service value chain to the left. By doing this, the service provider (IT) can increase speed and choice while at the same time reducing costs. Examples include allowing users to help themselves facilitated through portals and knowledge articles and self-service initiatives that are part of service catalog initiatives.
- **Continuous improvement.** Repeat as necessary to ensure that SLAs and automation meet targets and that expectations have not changed. The real issue here is changes in customer expectations. SLAs and automation can address performance to previously defined requirements and delivery expectations, but the focus of this report is keeping aligned with changing user demands, not just meeting the current demands — this is not a static situation.
- **Appropriate and timely communication.** Proactive communication of issues within the IT systems and services is critical to avoiding surprises for the business users. Business users hate surprises and find it very frustrating when they do not know what changed, or what services and applications will be affected today or in the near future. This communication is vital to reducing frustration.

KEY RECOMMENDATIONS

Reducing friction between the business users and IT needs to be owned, managed, measured, and continuously improved. IT needs to truly step up to the task of customer experience with having accountable and responsible owners who implement and manage IT customer experience. The following are key topics that you should address:

- **Organize and empower a team that is responsible for customer experience.** To truly affect the customer experience, you must empower a team who has the responsibility managing the customer experience of your business users. This team needs to define how you do customer surveys to get the appropriate details into IT so that action can be taken and/or behavior patterns modified. The customer experience team should not only determine the frequency and target group but also ensure that the survey is probing for ease, helpfulness, and friendliness of the support teams.
- **Pick the right metrics:** Define perception metrics by identifying the descriptive metrics that affect what customers think. Define outcome metrics that align with the company's key business drivers. Use regression analyses to validate your initial hypotheses. Plan to adjust your measurement framework as customers change over time.
- **Understand the attitudes, behaviors, and cultures of your customer groups.** Not all business users have the same expectations, demands, and needs. How and what business users expect can only be understood through conversations and discussions with the business users.
- **Adjust skills to modify your moments of truth.** The "moment of truth" — the point at which a business user connects with a group of people within IT — shapes the entire reputation of IT. Typically, this interaction happens through the service desk. The service desk, as the first point of contact, should be trained to be excellent customer service agents, to ensure that IT's moment of truth is a positive one.
- **Stop the ITIL Kool-Aid — process for process's sake.** Improving service management processes to become more efficient and effective across IT is very important. But without understanding the business user's situation, role, and perspective, it does not really add up to improving business users' experience with IT.
- **Leverage automation in key areas.** Automation of tasks, processes, and decisions can greatly accelerate the resolution of issues and requests and therefore reduce loss of productivity to business users if applied correctly. IT management solutions offer a wide range of automation capabilities that can help.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 900 business users and IT professional organizations in the US, UK, Germany, France, Singapore, Hong Kong, India and Australia, to evaluate the impact of IT service friction on businesses. Questions provided to the participants asked about their organizations' current IT service policies and effectiveness. The study began in December 2012 and was concluded in April 2013.

Appendix B: Endnotes

¹ Source: "2013 Mobile Workforce Adoption Trends," Forrester Research, Inc., February 4, 2013.

² Annual salary in dollars divided by 1,920 working hours per year = average hourly salary.

³ Source: "Labor Force Statistics from the Current Population Survey," US Bureau of Labor Statistics (<http://www.bls.gov/cps/cpsaat39.htm>).

Source: "Gross Monthly Income From Work," Singapore Ministry of Manpower (<http://www.mom.gov.sg/statistics-publications/national-labour-market-information/statistics/Pages/earnings-wages.aspx>).

Source: "ADVANCE ESTIMATES OF NATIONAL INCOME, 2012-13," India Ministry of Statistics and Programme Implementation press release, February 7, 2013 (http://mospi.nic.in/mospi_new/upload/nad_pr_7feb13.pdf).

Source: "2011 Population Census Household Income Distribution in Hong Kong," Hong Kong Census and Statistics Department, June 18, 2012 ([http://www.censtatd.gov.hk/FileManager/EN/Content_23/press_briefing_income_\(201206018\).pdf](http://www.censtatd.gov.hk/FileManager/EN/Content_23/press_briefing_income_(201206018).pdf)).

Source: "Employee Earnings and Hours, Australia, May 2012," Australian Bureau of Statistics press release, January 23, 2013 (<http://www.abs.gov.au/ausstats/abs@.nsf/mf/6306.0/>).

Source: Earnings in the business economy (average gross annual earnings of full-time employees), 2008-2010 (1) (EUR)," Statistics Explained, October 1, 2012 ([http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Earnings_in_the_business_economy_\(average_gross_annual_earnings_of_full-time_employees\),_2008-2010_\(1\)__\(EUR\).png&filetimestamp=20121001124232](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php?title=File:Earnings_in_the_business_economy_(average_gross_annual_earnings_of_full-time_employees),_2008-2010_(1)__(EUR).png&filetimestamp=20121001124232)).

⁴ Source: "Human Development Index," UNDP (<http://hdr.undp.org/en/statistics/hdi/>).