

SAMPLE COPY

CONSULTING MARKET PROGRAMME

# The Benelux consulting market in 2014

Including market sizing data, growth rates,  
current market trends and forecasts



# Contents

Executive summary	4
Methodology	5
Definitions of sectors and services	6
Contributors	7
Introduction	8
Market overview	9
The Netherlands	11
Belgium	13
Luxembourg	14
The drivers of consulting	15
Prospects for the next 12 months	18
Sectors	20
Financial services	21
Manufacturing	24
Public sector	26
Services	28
Energy and resources	30
Technology, media and telecoms	32
Pharma and biotech	34
Healthcare	36
Retail	38
Services	40
Technology	41
Operational improvement	43
Strategy	45
Financial management and risk	47
HR and change management	49

Critical success factors in the Benelux market	51
Client focus	52
Sector knowledge	52
Honesty	53
Clear thinking	53
Accountability	54
The competitive landscape	56
The market by firm type	58
Type T firms	59
Type A firms	61
Type S firms	63
Type P firms	65
About Source	68

# Methodology

Our report is based on two major source of primary data:

## **Clients of consulting firms:**

We interviewed and surveyed 75 (typically C-suite) end users of consulting services across Benelux. The majority (91%) work for private sector organisations, many of which are multinationals. The remaining 9% work in various public sector organisations.

For the sake of simplicity, and to protect the identity of clients who wished to remain anonymous, we have attributed every client quote to the director of a function (including describing CEOs, Managing Directors and Chairpersons as 'strategy directors'). This is a fair reflection of the seniority of the majority of people to whom we spoke, and saves us revealing job titles that might help someone to identify the individual. Anonymity is important when it comes to client interviews because without it clients are, quite understandably, a lot more guarded and don't always speak their minds as freely as they do when they know nothing they say will be attributed to them.

## **Consulting firms:**

Our definition of management consulting includes a broad range of business advisory services, but excludes: tax advisory; audit; the implementation of IT systems; the delivery of outsourced/offshored services; and HR compensation/ benefits administration and technology. Where mergers and acquisitions work is concerned, consulting on deals is included (under strategy), but corporate finance fees on deals themselves are generally not included although it is not always straightforward to separate the two.

The quantitative data contained in this report focuses on consulting done by mid-sized and large-sized consulting firms (those with more than 50 consultants) and typically includes work they have carried out for mid- and large-sized clients. It therefore reflects the 'addressable' market for the majority of mid- and large-sized consulting firms, as most would not seek or be able to compete with very small firms and/or freelance consultants.

We should emphasise that there are no standard sources of definitions of data within geographies let alone between them. We are, however, confident that the richness of our qualitative data, combined with Source's unparalleled industry expertise, means that our analysis fairly and accurately reflects the state of the market.

We interviewed 19 very senior (typically the most senior person either in the region or in their country) consultants from most of the leading consulting firms in Benelux and many smaller regional and local specialists. Our model (which we use to size the industry and its growth rates) is based on data from about 90 consulting firms.

## Definitions of sectors and services

Sectors	Sub-sectors
<b>Energy and resources</b>	Includes utilities
<b>Financial services</b>	Includes banking, insurance, investment and capital markets
<b>Manufacturing</b>	Includes construction
<b>Pharma and biotech</b>	
<b>Healthcare</b>	Includes publicly-funded healthcare
<b>Public sector</b>	Includes federal/central and state/regional/local government, state-owned organisations and education. Excludes healthcare
<b>Retail</b>	
<b>Services</b>	Includes business and consumer services, real estate, professional services, transportation and retail
<b>Technology, media and telecoms</b>	

Services	Sub-services	
<b>Financial management and risk</b>	Responding to regulation	
	Finance function	
	Budgeting/financial planning process	
	IT risk	
	Operational risk	
	Financial risk	
	Programme risk	
<b>HR and change management</b>	HR strategy and effectiveness	
	Benefits, compensation and pensions	
	Change management	
	Internal communications	
	Organisational design and culture	
	Stakeholder management	
	Team effectiveness and collaboration	
	Leadership and governance	
	Performance management	
	Talent management/training and development	
	<b>Operational improvement</b>	Business continuity and recovery
		Knowledge management
Lean and six sigma		
Property and estate management		
Quality and performance management		
Supply chain management		
Cost-cutting		
Innovation		
M&A integration		
Managing quality		
Post-M&A integration		
Process design and re-engineering		
Procurement/purchasing		

Services	Sub-sectors
<b>Strategy</b>	Research and development
	Benchmarking
	Distribution strategy
	Environmental, sustainability and CSR
	Operational review
	Business and financial modelling
	Corporate re-structuring
	Corporate recovery and turnaround
	Corporate strategy
	Market analysis and strategy
	Market research
	Policy formulation
	Strategic sourcing/offshoring strategy
	Due diligence and valuation
Infrastructure/asset financing and management, PFI	
<b>Technology</b>	Mergers and acquisitions
	Customer service
	New product development
	Branding
	Marketing and channel management
	Customer relationship management
	Pricing
	Sales force effectiveness
	Category management
	Sales and distribution planning
	ERP consulting
	IT training
	Application of new technology
	Hardware/software selection
IT design and build	
IT strategy, planning and review	
IT testing and integration	
Management information and business intelligence	
Technology and security risk services	
Hardware/software and systems implementation	
Requirements definition	
Web and internet consulting	
Project and programme management (eg where consulting firm has been engaged to run a specific project which it is otherwise not involved in)	

## Contributors

We are extremely grateful to all the people we spoke to for making this report possible. Below is a list of the individuals that have contributed from consulting firms (all clients and some consultants remain anonymous).

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## 2014 Consulting Market Programme research schedule

**Reports for different regions vary in length but the content includes:**

- Overall description of the market in the region
- Data for the consulting market, by sector, service and segment
- High-level breakdown by geography within region
- Discussion about the current state of, and prospects for, the consulting market by sector, service and segment, combining the feedback of consultants
- Analysis of the key challenges and opportunities in the market
- Feedback from clients about individual firms (in selected regions)
- Growth forecasts

*Please note that this content is subject to slight changes and amendments*

<b>January</b>	UK
<b>March</b>	Gulf Cooperation Council (GCC)
	Nordics
<b>April</b>	France
	Benelux
<b>May</b>	Germany, Switzerland, Austria (DACH)
	USA
<b>June</b>	E Europe, Russia
	Southern Europe
<b>July</b>	Australia
<b>September</b>	Africa
	India
<b>October</b>	China
	Brazil

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# About Source

Source Information Services Limited (Source) is a leading provider of information about the market for management consulting. Set up in 2007 with offices in London and Dubai, Source serves both consulting firms and their clients with expert analysis, research and reporting. We draw not only on our extensive in-house experience, but also on the breadth of our relationships with both suppliers and buyers. All of our work is underpinned by our core values of intelligence, integrity, efficiency and transparency.

Source was founded by Fiona Czerniawska and Joy Burnford. Fiona is one of the world's leading experts on the consulting industry. She has written [numerous books](#) on the industry including: [The Intelligent Client](#) and The Economist books, [Business Consulting: A Guide to How it Works and How to Make it Work](#) and [Buying Professional Services](#). Joy Burnford was Marketing and Operations Director at the UK Management Consultancies Association between 2003 and 2010, and prior to that worked for PA Consulting Group and has extensive experience of marketing consulting services.

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