

SAMPLE COPY

CONSULTING MARKET PROGRAMME

The DACH consulting market in 2014

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



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Methodology

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

Clients of consulting firms:

We interviewed and surveyed 132 (typically C-suite) end users of consulting services across the DACH region. 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 around 30 very senior (typically the most senior person either in the region or in their country) consultants from most of the leading consulting firms in the DACH region 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 125 consulting firms.

Definitions of sectors and services

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

Services	Sub-services
Financial management and risk	Responding to regulation
	Finance function
	Budgeting/financial planning process
	IT risk
	Operational risk
	Financial risk
	Programme risk
HR and change management	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
Operational improvement	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
Strategy	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	
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	
Technology	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

January	UK
March	Gulf Cooperation Council (GCC)
	Nordics
April	France
	Benelux
May	Germany, Switzerland, Austria (DACH)
	USA
June	E Europe, Russia
	Southern Europe
July	Australia
September	Africa
	India
October	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](#).

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