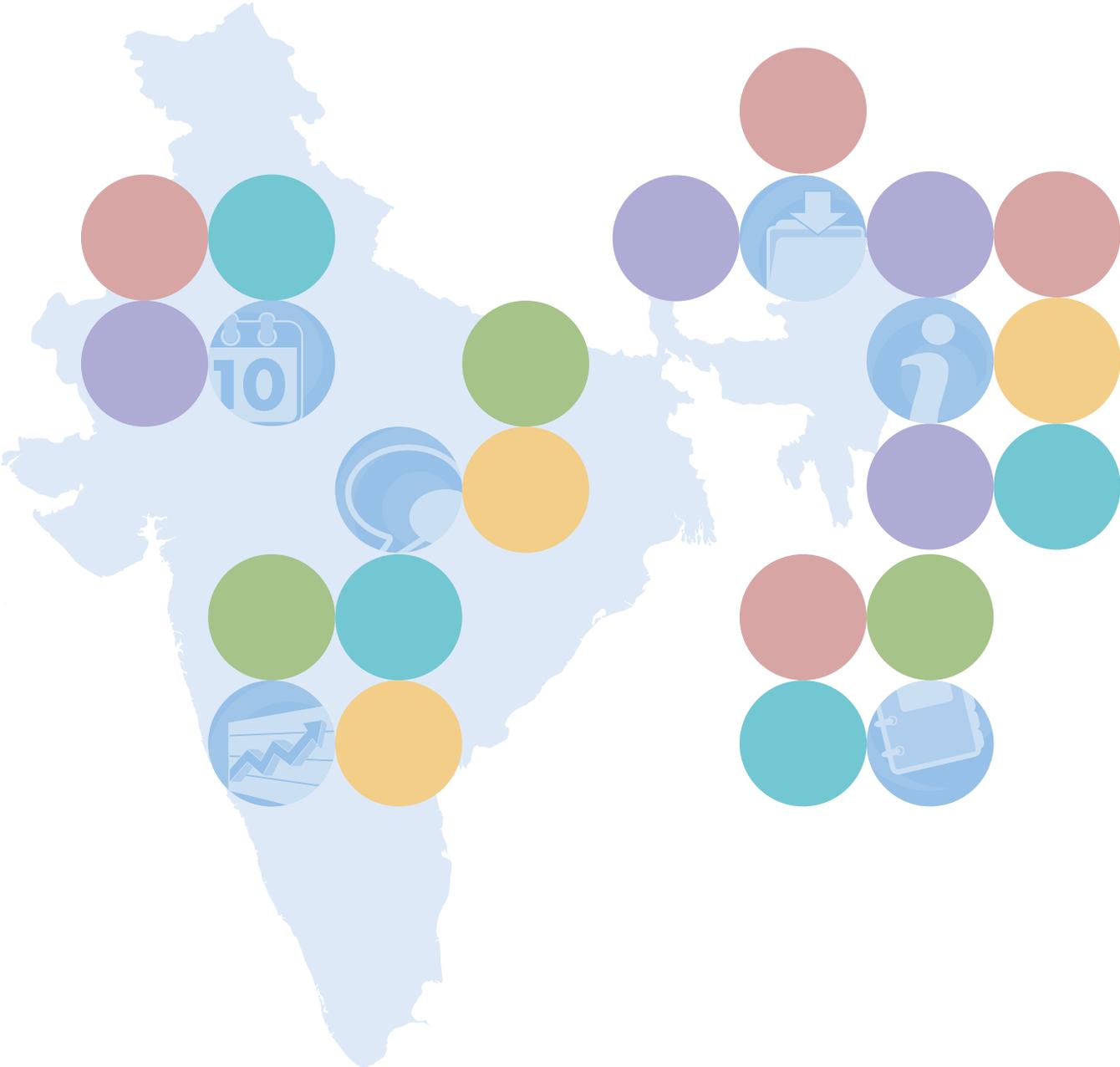


SAMPLE COPY

CONSULTING MARKET PROGRAMME

The consulting market in India in 2014

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



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Methodology

This report is based on gathering primary data from 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 15 very senior (typically the most senior person in their country) consultants from most of the leading consulting firms in the country and many smaller local specialists. We also conducted desk research on a further 50 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 |
| | Research and development |
| | Benchmarking |

| Services | Sub-sectors |
|----------------------------------|--|
| Strategy | 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 (some consultants choose to 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 | Eastern Europe, Russia |
| | Southern Europe |
| July | Australia |
| September | Africa |
| | India |
| October | China |
| | Brazil |

* Source will be producing three additional country reports in the autumn of 2014 covering Mexico, Turkey and Indonesia. Please contact Alice Noyelle (see below) for further information.

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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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