

What is the future for public sector consulting?

A Source report, sponsored by Capgemini Consulting



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Executive summary

The level of consulting in the public sector has fallen dramatically since the election but debates about when it will recover miss the point.

The research summarised in this report was based on a survey of more than 100 senior public sector managers across central and local government, and the NHS, and on in-depth interviews with 20 more during the course of October 2010. It demonstrates that senior public sector managers fully expect the private sector to play a bigger role in central government in the future. But it also shows that they want to work with consulting firms in a new way. Joint ventures are expected to play an important role here, leveraging the skills of public and private sectors perhaps alongside those in voluntary organisations. Traditional consulting will be combined with “doing” and paid for on the basis of success. This creates a once-in-a-generation opportunity for the consulting industry to reinvent itself, at least where public sector work is concerned. But it will also depend on the public sector taking a more sophisticated approach, putting together commercial deals instead of simply buying advice.



Foreword

Keith Coleman, Global Head of Public Sector, Capgemini Consulting

Capgemini Consulting is delighted to sponsor this independent research which demonstrates the appetite public sector managers have for finding new ways to work with the private sector. Its conclusion – that the consulting industry needs to reinvent itself for a new post-CSR world, creating joint public-private ventures focused on results – is something we wholeheartedly endorse.

We are already at the leading edge of working in new ways with the public sector to make delivery happen. For example, Working Links, our joint venture with the Department for Work and Pensions, Manpower Plc, and Mission Australia, has been pioneering a more collaborative approach, offering support to unemployed and disadvantaged people to get them back to work. Over the last few years, Working Links has grown to become one of the country's leading welfare to work delivery organisations, helping more than 150,000 individuals back to work through matching them with an employer or helping them to set up their own business. While we continue to play an active role in this public/private joint venture it is very much a successful business in its own right. Today, Working Links employs more than 2000 people in 180 locations spread across England, Scotland and Wales, and featured in the Sunday Times 100 Best Companies to Work For list. The Links Foundation – a charitable trust set up in 2004 by the shareholders – has returned more than £3 million to the communities where Working Links delivers, benefitting 150 projects.

We are also working in new and innovative ways with local government as they address the major challenges that they face post the Comprehensive Spending Review (CSR). For example, for Gloucestershire County Council, we have been delivering side by side with public servants in vital areas such as school transport and front-line customer contact to make real efficiencies, with our experts directly accountable for performance improvements.

Traditional consulting has, even at its impressive best, stopped at the point when recommendations have been made and obstacles to implementation identified. Beyond that, clients have been on their own. Our experience, in Working Links and other initiatives over the last decade, is that there is an alternative approach, one in which consultants become involved in delivery, build the skills of the people they work with and are paid by the results they achieve.

Working in this way creates substantial challenges for both consulting firms and the public sector, but unprecedented problems can only be solved by brave and innovative solutions. Capgemini Consulting is already in the forefront of making many of these ideas work in practice. With this report, it also hopes to facilitate a debate across the public sector about how best to create a new model of partnership for the challenging times ahead.

Is public sector consulting dead?

The speed and severity of the cuts in public sector consulting have surprised consulting firms.

“There’s a complete moratorium on using consultants,” remarked one senior civil servant interviewed for this report. “The notion that we might use consultants to work on some of the changes we’re currently planning just doesn’t enter into the conversation. It’s literally a taboo subject.” “The government has the ability to recruit, train and retain the best people,” said another, “so we should be making best use of the skills we have rather than bringing in consultants. The challenge at the moment is more about the inflexibility of government when it comes to deploying staff.” Some departments, notably DEFRA, have already been experimenting with replacing traditional organisational structures with a project-oriented system that builds interdisciplinary teams to tackle discrete tasks.

It’s a similar story outside Whitehall: “There’s very little consulting going on,” confirmed an NHS manager. “There’s no budget. It’s not just the economic climate that’s driving that, but also the fear about the negative publicity which might result. We can’t use consultants – and we can’t be seen to use them.”

Our research suggests that there is little prospect of an immediate resurgence in the use of consultants. Three quarters of the public sector managers we surveyed said that expenditure on consultants in their organisations will fall further in the next 12 months, and 40% of them by more than 20%.

However, one of the fundamental reasons why organisations, in both the public and private sectors, use consultants is to access specialist skills which are not available internally and which it doesn’t make economic sense to have in-house because they’re only needed occasionally. This hasn’t changed: almost half the public sector managers we surveyed said that they expected a shortage of in-house skills would increase the probability that consultants are brought in. Here’s a manager in the NHS talking: “We’ve used consultants a lot in the past and, if anything, there’s a greater appetite to use them in the future. GP surgeries are partnerships which have to make a profit for their health centre; they’ll undoubtedly look to other private sector organisations to help them do so.” Help in restructuring, operational improvement and technology change top the list of skills expected to be scarce.

Moreover, public sector organisations are also likely to find themselves short of good people across the board. As many a private sector organisation has found out to its cost, restructuring and threatened job losses trigger an exodus of senior people who are confident of finding securer employment elsewhere. Given how long it can take to replace senior civil servants (a point the National Audit Office (NAO) drew attention to in its 2006 report on central government’s use of consultants), this will result in increased short-term demand for general management and policy development skills.

This means that some consulting activity will return over the next year. This is likely to come in two forms.

First, there will be some high-profile projects where external and objective input will be required. Our survey suggests that public sector managers expect to increase their use of larger consulting firms relative to other types. Asked what kinds of firms they would hire in the future, people working in central government departments said they would be twice as likely to use big strategy firms to niche ones, and big IT firms over smaller ones. They are also roughly three times more likely to mention Big Four firms (Deloitte, Ernst & Young, KPMG and PwC) than any other type of firm. This is to be expected: faced with the severest recession in living memory, private sector managers reacted in the same way, increasing the proportion of money spent with the biggest consulting firms. The security and comfort offered by a well-known brand was the primary driver behind this: “If our budget is limited and we’re only bringing consultants in to work on high-profile projects, how can I defend a decision to hire a firm no one has ever heard of?” was how a private sector manager described the dilemma.

A second but less defensible use of consultants will be to fill management roles – the staff “substitution” for which the industry has already incurred criticism, but which some firms, keen to recoup lost revenue, already appear to be positioning themselves. “Never mind the idea of imposing a threshold at which ministerial approval has to be sought for using consultants,” said a senior civil servant we interviewed, “what the Cabinet Office should have done is ban the use of consultants entirely. We may not be able to buy consulting services, but we’re spending a lot of time in meetings with consultants who have offered their services free, often to ministers and special advisers.” Distraction wasn’t the only problem with this: “We also put ourselves in debt to firms that do this. You worry that there may be a tacit promise of future work.”

Both these approaches miss the point. Our research suggests that public sector managers want a very different type of relationship with consulting firms going forward, something that has the potential to drive a wedge through the consulting industry, separating those firms that continue to focus on selling advice and expertise from those that are prepared to become an integral part of the public sector.

The aim of this report is to explore these points in greater detail:

- **What type of public-private sector relationship do senior civil servants envisage in the future?**
- **What are the implications of this for the consulting industry?**
- **What needs to be changed in the way public sector managers work, in order to make this aspiration a reality?**

The coalition economy

The senior public servants we surveyed are in no doubt that the changes heralded by the CSR will result in the private sector playing a greater role in central government.

According to our research, those expecting private sector involvement to increase outnumbered those that don't by a factor of four to one (Figure 1). Moreover, many also anticipate the private sector's role widening. That two thirds believe that the private sector will be involved in back-office functions is perhaps not surprising (Figure 2): outsourcing IT is already common and the recent debate about shared services is often predicated on at least some of the service being offered by a third party. However, just over half of those we questioned said they also expect the private sector to be involved in delivering front-office services in the future, and a quarter think private companies may take over some areas of policy development.

Cost is the primary driver behind this. The probability of private sector involvement increases depending on the money they can save: almost 60% of people surveyed said that this will be an important factor in using private companies (Figure 3). A more commercial outlook among civil servants and the lack of any realistic alternative for a cash-strapped public sector will also influence this decision. Public acceptance of greater private sector involvement is not, however, expected to be a factor, implying that public sector managers recognise that any plans they have for increasing the role of the private sector are unlikely to have widespread support.

Figure 1:

Do you think the private sector will play a greater role in central government within the next five years?

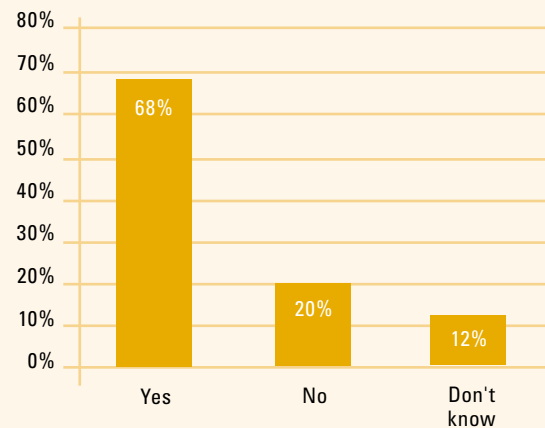


Figure 2:

In which of the following functions do you think the private sector will be involved over the next five years?

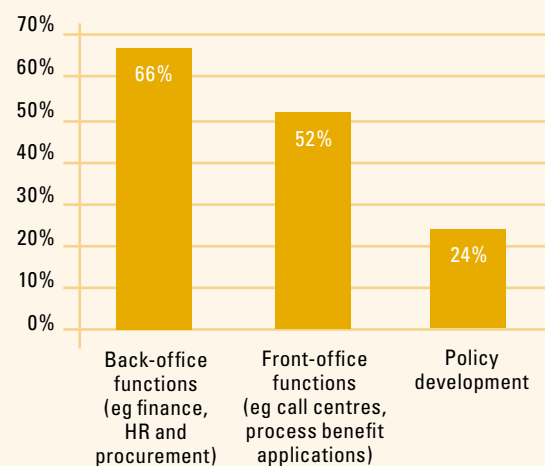
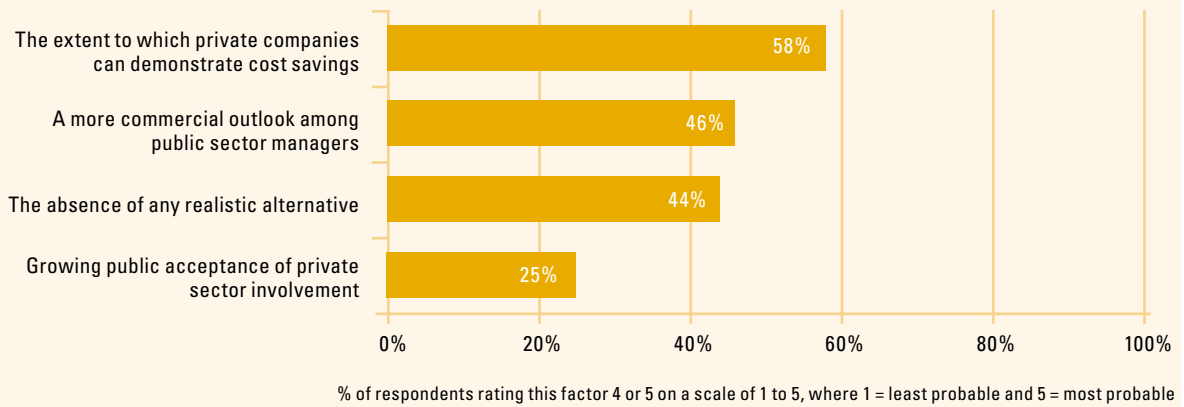


Figure 3:

To what extent will the following factors increase the probability that private sector companies will be involved?

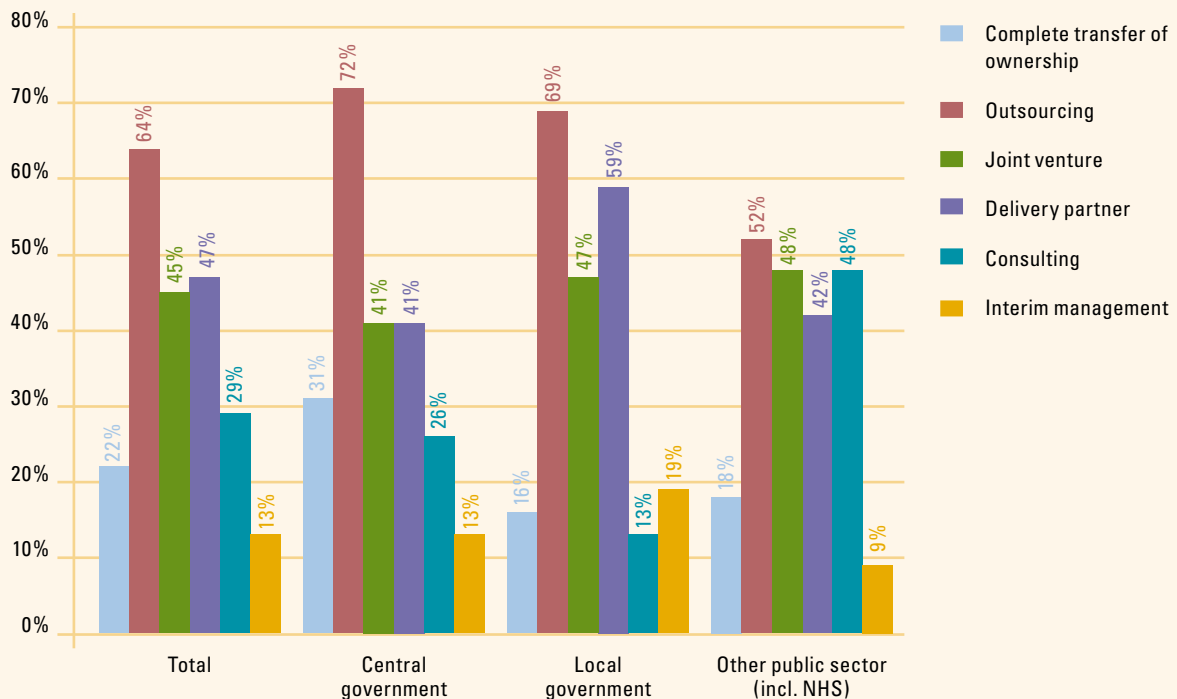


But what form will this greater involvement take? What kind of relationship does the public sector expect to have with the private sector?

While still wanting to access specialist skills, civil servants don't expect to obtain them via traditional routes. Only 13% on average expect interim managers will be common in the future, and only 29% think that consultants will be (Figure 4).

Figure 4:

Which of the following forms of private sector input do you think will be most common in the future?



Note: Respondents were able to pick up to three of the following options:

- Complete transfer of ownership: Where a function or organisation becomes a standalone private business or part of another private business.
- Outsourcing: Where a private sector company takes over a specific business process, selling the service back to a public sector body.
- Joint venture: In which public and private sector organisations share ownership, revenue and costs.
- Delivery partner: In which a private company is asked to undertake a specific, tangible task such as implementing a new IT system.
- Consulting: Where a private company provides advice and support to public sector employees.
- Interim management: In which individuals take on line management roles for a defined period of time.

By contrast, 64% believe that outsourcing will be very common; 47% think that private companies will be used as delivery partners, to undertake specific, tangible tasks; and 45% expect to see more joint ventures in which public and private organisations share ownership, revenue and costs. Responses varied in different parts of the public sector. More people in central government departments expect outsourcing and complete transfers of ownership (in which a public sector function or organisation becomes a commercial business). In local government, the expectation is that there will be greater use of delivery partners and much less use of traditional consulting. Only in other parts of the public sector (in terms of our survey, largely the NHS), is there a belief that consulting will be common again in the future.

What stands out is that, while public sector managers expect the private sector to be more involved, they don't want to hand over complete control to it, hence the preference for outsourcing, joint ventures and the use of delivery partners. Implementing the plans of the coalition government will require a coalition economy in which private and public sector organisations, alongside voluntary ones, will have to work together. "We have to save £20 billion," one public sector executive summed up the situation, "and we are quite prepared to spend money with private sector organisations where they can show they can help deliver that. But we don't want – or see any reason – to revert to the kinds of relationships we had with such organisations prior to the election. Our world is changing beyond recognition, and theirs needs to as well." "There's been a lot of talk by consulting firms about 'working in partnership' with the public sector," said another, "but it hasn't always been clear to us what this meant in practice. For some firms, it was just a marketing statement, a modus operandi which implied a more collaborative style of working; others took it to mean greater accountability. Either way, it's hard to point to a single project where the concept has created measurable value for either side. That doesn't invalidate the idea, but it does raise the question of how it might do so in the future."

Thus far, there has been no clear articulation of these issues: focused on identifying potential savings in the run-up to the Comprehensive Spending Review announcement, attention in the public sector is only now being turned to the detail of how the proposed changes will be made in practice – and there is still some way to go before civil servants start to consider the role the private sector may play. "In so far as we're thinking about this issue at all, it's at the very edge of our radar," said one senior civil servant. "The serious thinking will start now the spending review has happened, but the conclusions will take time to work out. It'll be at least six months before we're in a position to start meaningful discussions. We have to wait for the dust to settle."

But vacuums are dangerous. Here, because no alternative relationship has been articulated, the risk is that an opportunity is missed to reinvent the way in which public sector managers work with consultants, and vice versa.

Next generation consulting

We asked public sector managers to distinguish the characteristics they would like to see in private sector organisations which work with the public sector in the future. Although asked in the context of a wider discussion about the role of consultants, their responses provide some indication of their more general preferences as well. Broadly speaking, their views divided into three main areas:

- **Structure: the kind of private sector organisations they want to work with.**
- **Relationship: the types of commercial arrangements they think will be appropriate.**
- **“Asset”-related: the extent to which joint working is reinforced by investment and a willingness to give, not take.**

Structure: collaboration and opportunity

We asked those we surveyed and interviewed their opinions on the merits of four organisational models, all of which have been the subject of recent debate in the media.

Employee ownership: One area of discussion has focused on whether some public sector functions would operate more efficiently as mutuals or other types of employee-owned organisations. It was a point made by several of our interviewees: “Rather than transferring staff to a shared service centre or even to a private sector supplier, we should be able to offer them the chance to have a stake in a new form of business,” commented one. “There is definitely an appetite for new business models in the public sector, especially among politicians.” However, our research suggests that such thinking has so far had only a limited impact. Approximately two thirds of those questioned thought this would not be important in choosing a private sector organisation, an attitude that was consistent across all parts of the public sector (Figure 5).

A strong record in employee relations: Most people expect to see a rise in outsourcing across all areas and functions of the public sector – something that will inevitably involve transferring staff to private sector organisations. Our survey suggests that this is an issue which a significant number (45%) of senior civil servants regard as important (Figure 6). “Clearly, more of what we do will be done by the private sector in the future,” commented one, “but in making that happen, we will have to be able to demonstrate that the suppliers we choose are going to protect, even create jobs and that the people transferring across to them will have opportunities for training and development they wouldn’t have had in their previous employment.”

Figure 5:

To what extent will the fact an organisation is at least partly owned by its employees be important?

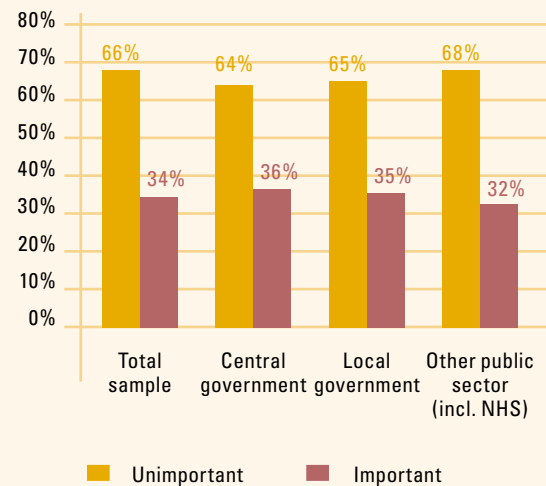
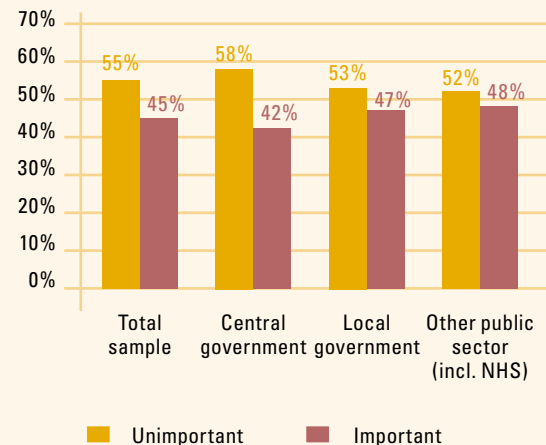


Figure 6:

To what extent will a private sector organisation's record in employee relations be important?



Social enterprise: A similar proportion (48%) of public sector managers also believe that it will be important for a private sector organisation to have links to social enterprise (Figure 7). People in the NHS were substantially more likely to think this important. Those in central and local government, less so, but even here, a significant minority (43%) value such connections. This suggests that, while some public sector managers maintain a clear distinction between public, private and third sectors, others would like to see those boundaries blurred. At the moment, the “Big Society” agenda is little more than that, with minimal practical flesh on its aspirational bones. Asking private sector companies to deliver services in conjunction with charities and voluntary organisations may be one attractive and cost-effective way to make it a reality.

UK-based operations: This question received the strongest response, presumably because it tapped into well-publicised fears that a shrinking public sector in the UK will fuel growth in emerging, lower-cost economies. Senior civil servants will always be aware of the political context when responding to questions such as these and frame their responses accordingly: 65% of central government managers considered this to be an important factor in choosing which private sector companies to work with, as opposed to 35% who did not (Figure 8). The reaction was less extreme in local government and other areas of the public sector.

Overall, this part of our research suggests that a substantial minority of senior civil servants have decided views about the type of private sector organisations they expect to be working with in the future. Senior Whitehall managers in particular may expect more of the work done by them and their teams to be undertaken by private companies; they would like this to be done by organisations that treat their staff well and are capable of working collaboratively with the not-for-profit sector as well; but they do not want to see jobs moving overseas.

Figure 7:

To what extent will a private sector's connections with social enterprise be important?

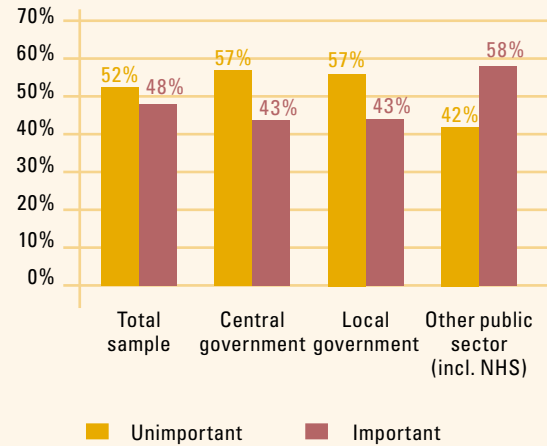
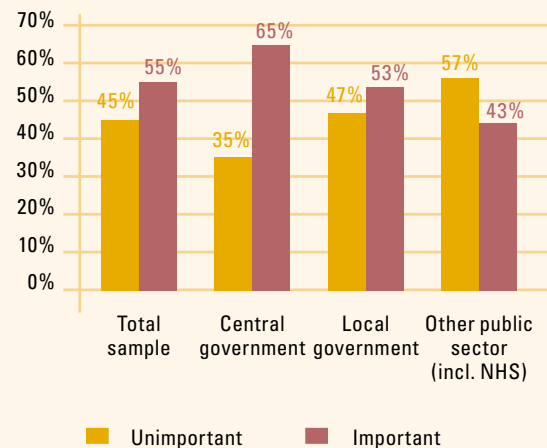


Figure 8:

To what degree will the extent to which a private sector organisation's staff are based in the UK, as opposed to overseas, be important?



Relationship: Focused on outcomes

The importance of moving the use of consultants to outcome-based contracts and payment was highlighted in the National Audit Office's October 2010 report, Central Government's Use of Consultants and Interims: "Departments should define the expected outcome and benefits at the outset and make more use of incentive based and fixed price contracts to deliver these outcomes. Business cases should be assessed by people that understand how to use consultants effectively. Using time and materials contracts, and a focus on daily rates alone, can lead to cost overruns and unnecessary work. Performance assessments should include a review of the outcome of the work, and whether beneficial changes have been achieved."

Progress has been made here. The 2006 NAO report on government's use of consultants showed that few public sector contracts contained any performance-related element, but our research shows that this has increased, to a point where it is now more prevalent than in the private sector, suggesting that some government departments have been more sophisticated than their private sector counterparts when it comes to buying consulting services (Figure 9 and 10). However, public sector managers are also substantially more likely to make traditional, time-and-materials payments, indicating a wide variance in the way parts of the public sector buy and use consultants: if some areas are more sophisticated than the private sector, many remain less so.

41% of the senior public sector managers questioned by us, and 51% of those working in central government, recognised this opportunity (Figure 11 overleaf). Given that a greater proportion of outcomes-based pricing was recommended in the NAO's 2006 report, perhaps the most important question is why, despite the widespread recognition of the appropriateness of this approach, it doesn't happen more in practice. One reason is that only some consulting services lend themselves to this approach, but the NAO also pointed an accusing finger at procurement processes which focused on the initial stages of contract management rather than ensuring effective value for money during the course of a project. "Procurement functions will often only have time and expertise to deal with the initial contracting and have limited oversight of the progress being made on individual contracts," it noted.

Figure 9:

Breakdown by type of payment in the public sector.

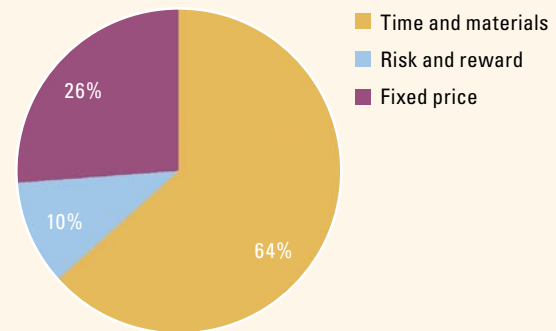
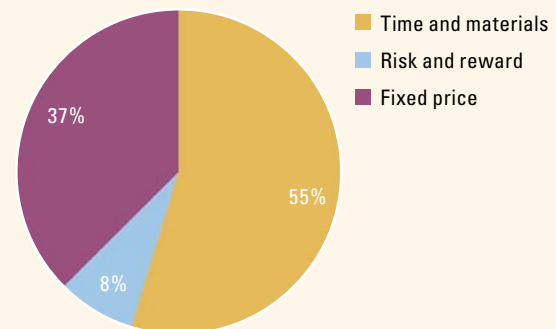


Figure 10:

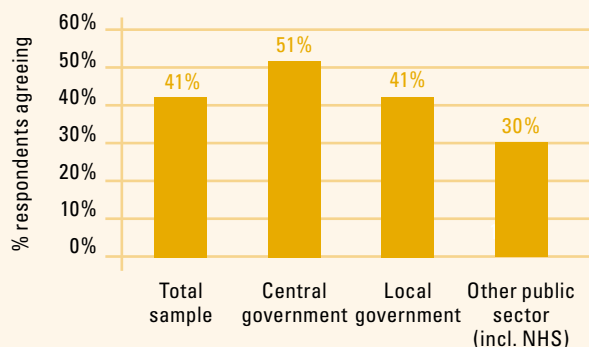
Breakdown by type of payment in the private sector.



Source: 'Quarterly Buying Trends in Consulting report', September 2010, sourceforconsulting.com

Figure 11:

Will payment by results increase the use of consultants?



The people we interviewed go further: many, especially those not based in the procurement function, criticised government frameworks for “forcing” them to buy skills on a time-and-materials basis. “I think there’s been confusion here between the need to ensure we’re using our own staff to their full ability and the way we hire consultants,” said one. “Clearly, we should start from the position of using our existing skills where we have them, but that leads quickly and almost unavoidably into a discussion about the additional skills and, therefore, individuals we need to plug the gap. It’s hard to stand back and say, ‘how can the private sector help us achieve our objectives?’” “We can see, even now, that we may want private companies to put together commercially viable propositions for taking over some of the work we do,” said another, “but I can’t see any way in which we could do this using the frameworks that have been developed for buying in external support.”

That sense of frustration is widespread: even the NAO’s recommendations are thought to miss the point. “What’s the point of telling us how to buy consulting better, if we’re not buying consulting anymore?” asked a senior local government manager.

Assets: Building, not abandoning

Outcome-based contracts and payments aren't just important in their own right: our survey suggests that they are also a means to a more fundamental and important end.

Back in the 1990s, sometimes consulting could be seen as a hit-and-run affair, with little attention apparently paid to the sensitivities of a client's staff. Aware that they were stoking resentment for the future, the consulting industry has spent the last decade building and promoting its ability to work alongside clients. However, at its heart, traditional, advisory-style consulting revolves around a relationship in which one side tells the other what to do in return for payment.

It's clear from our research that civil servants, faced with the challenge of making unprecedented cuts in public spending, want to move beyond this. Asked whether they thought a better understanding of the public sector by private sector companies would be important in the future, more than three quarters agreed (Figure 12). We suspect this mirrors a reaction we noted in private companies during the recession. Then, companies which had been through traumatic periods of restructuring chose consulting firms which understood, and were prepared to adapt to, a new set of constraints.

The reaction was equally strong when we asked about the extent to which a private company's willingness to use the knowledge of civil servants would be an important factor. 71% of respondents agreed with this (Figure 13). The public sector is not a green-field site on which suppliers can erect buildings of their own design; it has existing assets – tacit knowledge, skills and strengths not found in private sector organisations – that need to be incorporated into whatever joint ventures and other initiatives will be created in the future. The point relates to structure (each participating organisation has a distinct role in creating value) and opportunity (public sector managers have skills that should be leveraged), but also to culture (the acknowledgement that private and public sector skills are complementary).

Figure 12:

To what extent will a better understanding of the public sector on the part of private sector companies, be important?

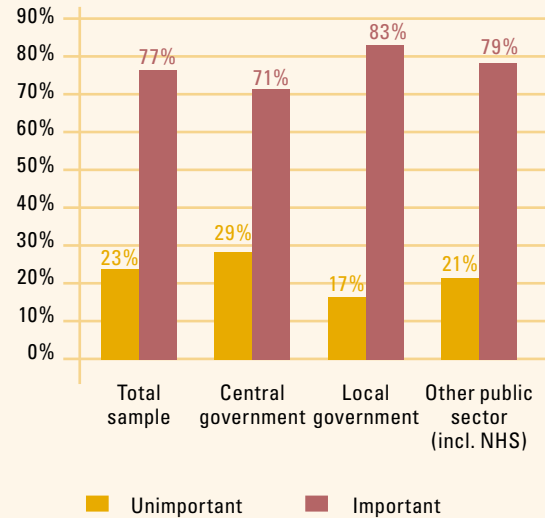
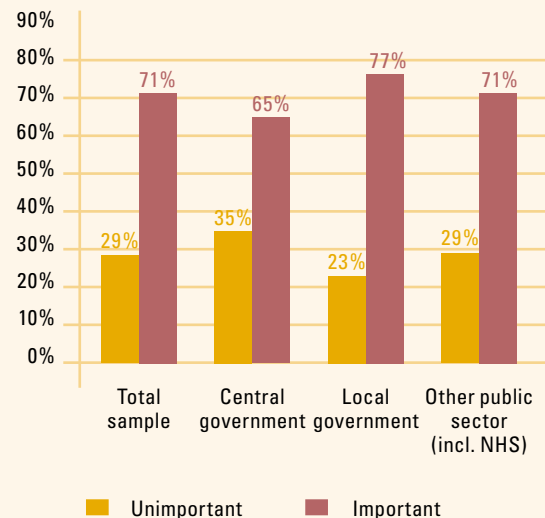


Figure 13:

To what extent will the willingness to recognise and use the knowledge of civil servants, be important?



A once-in-a-generation opportunity

These perceptions among public sector managers create a compelling agenda for change in a consulting industry that has been largely built on selling expertise, not delivering measurable outcomes.

But what will a public sector consulting firm look like in the future? Certainly, it won't look much like a traditional advisory firm, but nor will it resemble a conventional outsourcing firm. Extrapolating from the research summarised in this report, we think it will take responsibility for delivering work that has traditionally been done in the public sector. "Advising" will be replaced by "doing". This may be in a back- or front-office function, policy development, or a combination of all three.

A firm's business case for participating in such deals will be based on its ability and willingness to offer better training to, and increase the innovation and improve productivity of those currently doing the work, rather than cutting jobs. It will therefore be able to demonstrate an exceptional record, not only in developing its own staff, but in taking in teams from other organisations and offering them new opportunities and in using its experts to train in-coming staff from the public sector, not to replace them. It will be prepared to invest in the local communities where it works, building skills there rather than sending work overseas.

Rather than delivering the work as a conventional service, it will create joint ventures and other structures in which the distinction between public and private sectors becomes meaningless. It will already have experience of work done in conjunction with not-for-profit and voluntary organisations – and will be willing to incorporate the skills and resources of the third sector in new ventures in the future.

In commercial terms, these initiatives will be structured to ensure that everyone, irrespective of whether they came from the public, private or third sectors, is incentivised to ensure delivery, and shares equally in the risks and rewards of success. They will be managed on simple commercial principles, not pulled in a multitude of different directions as a purely public sector organisation would be nor built around utilisation and time-and-materials as a conventional consulting firm would be. Participants will be paid based on the performance of the venture, perhaps even from the surplus it generates. Much as people starting a business would be, they will be paid when the venture can afford to pay them. Their focus will not be to complete a project on time, or to add some entirely intangible value, but to create an "asset" (anything from a new process to a fully-fledged, sustainable organisation) which all the participants in the venture have contributed to and which they all jointly own.

Not every consulting firm will embrace this opportunity: some – perhaps the majority – will prefer to continue to provide skills as they have always done, and be paid largely on the basis of time they put in. Demand will continue to exist for this *modus operandi*, although at far lower levels than seen in recent years. Other firms, however, those brave enough to plan and invest, will seize the initiative and articulate now how they plan to do things very differently in the future.

"If I was a consulting firm I'd be modelling my proposition on this approach," commented an NHS manager.

"Consulting firms need to reinvent themselves." There is a huge opportunity here for the industry: "With details of the CSR announced, attention is not so much on what is to be done as how it is to be done," said a civil servant. "That's what's needed now. And if this isn't the wake-up call that the consulting industry needs then I don't know what is."

Breaking down the internal barriers

And it's not just the consulting industry that needs to change.

In interviewing public sector managers across a wide range of government departments, local authorities and other institutions, it is clear that the level of thinking about the issues outlined in this report varies dramatically. Our survey also suggests that civil servants with less experience of using consultants are less likely to consider using outcomes to measure performance and as a basis for payment; are more likely to think in terms of the skills and people they would require; and have lower expectations when it comes to the consulting industry taking the initiative to change their ways of working.

In Whitehall, people from policy-driven departments tend to see consulting firms much more as upmarket body-shops than those who worked in departments which have large-scale front-line and/or operational responsibilities. Comments varied from "We should be putting more effort into breaking down our requirements from consulting firms to a more detailed level so that we ensure we're getting a round peg for a round hole", to "In the future it will be critical to break down the boundaries between areas such as consulting and outsourcing. This is a sign of intelligent buying, seeing that there are connections between services which the public sector can take advantage of."

A more sophisticated approach from the consulting industry will need to be met by greater sophistication among public sector managers, particularly when it comes to procurement. Private companies, when setting up joint ventures, don't ask their procurement teams to invite bids from a range of suppliers. Rather, the venture is the outcome of months of discussion between two parties, as each feels its way towards a commercial structure best able to deliver their objectives. There isn't a buyer and supplier, in the conventional sense. As the non-executive director of one government agency put it: "We shouldn't be putting up walls between ourselves and the private sector, but tearing them down."

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