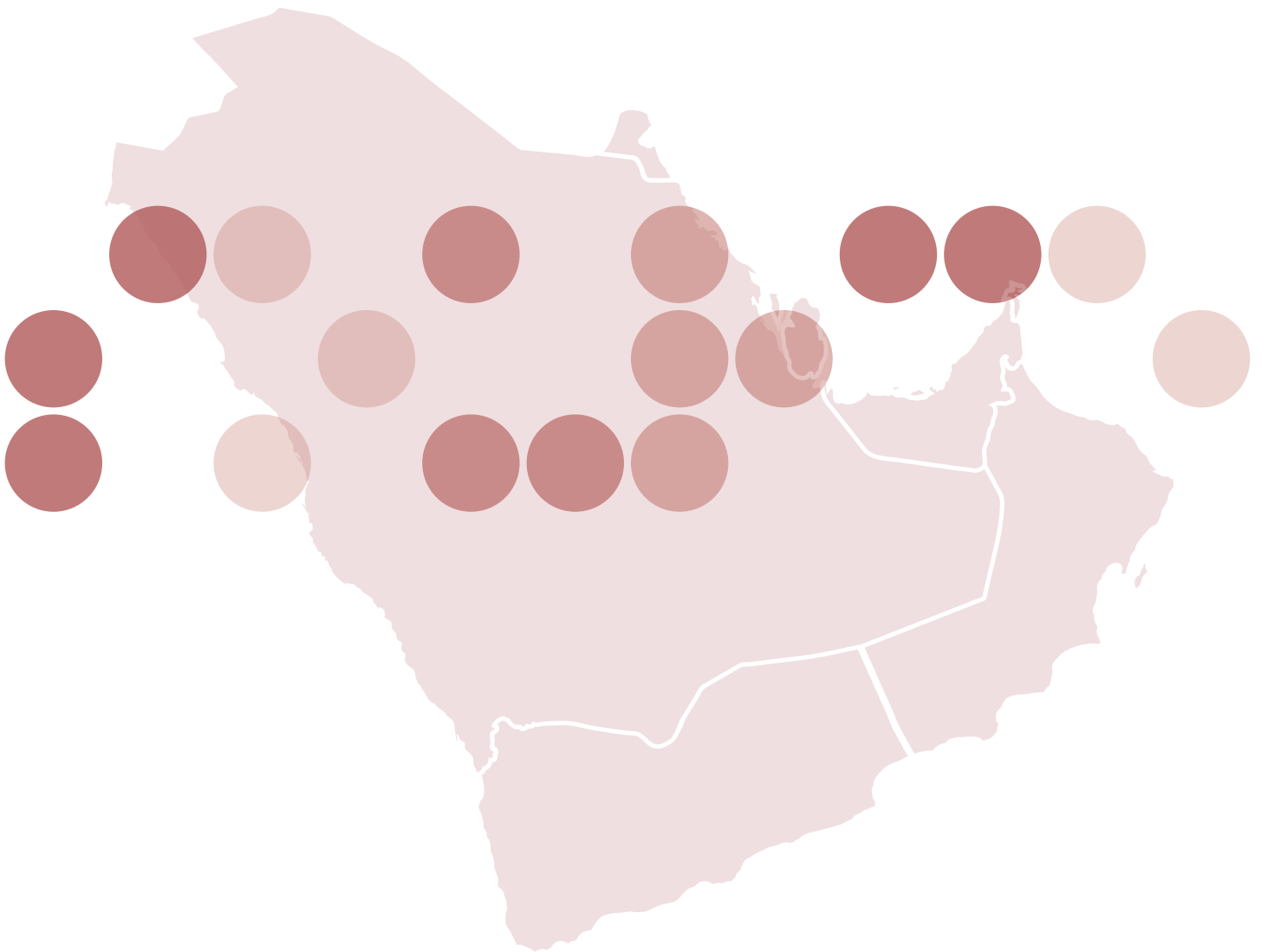


Perceptions of consulting in the GCC



Contents

Methodology	3
Our sample and approach	3
Segmenting the industry	3
What's the big story?	4
Price	5
Strategy firms	6
Big Four firms	7
Technology firms	8
Quality	9
Strategy firms	11
Big Four firms	13
Technology firms	15
Value	17
Strategy firms	18
Big Four firms	19
Technology firms	20
Conclusion	21
The factors that influence perceptions	22
Strategy firms	24
Big Four	25
Technology firms	26
Firm-by-firm analysis	27
Summarising views about quality by firm	34
Summarising views about value by firm	35
Summarising views about price by firm	36
About Source	38

Methodology

Our sample and approach

We have 207 responses from our survey of GCC-based executives in November-December 2014, the vast majority of whom were directors, vice-presidents and senior managers, and all of whom had been responsible for buying substantial volumes of consulting services in the previous year.

Just over 60% come from back-office functions (operations, finance and risk, IT and HR) and almost 40% from front-office ones (general management, strategy, marketing and sales). 10% of our respondents work in organisations that employ over 5,000 people, and 47% from organisations employing over 500 people. The respondents come from a wide range of industries, including: energy and resources, financial services, healthcare, manufacturing, pharma, public sector, retail, services, and TMT.

We also split our sample between direct and indirect clients (a distinction we explain in detail on page 6) where indirect clients were those who had not engaged consultants but had seen consultants at work or who had influenced the buying decision. Executives with no experience of using consultants have been filtered out of the research. Our sample is slightly skewed in favour of indirect clients, reflecting the maturity of the GCC consulting industry.

Segmenting the industry

We asked respondents to rate firms they'd selected, one by one. To prevent responses being spread over a very large number of firms, respondents were provided with a list of Tier One firms from which they could choose. To look at the results by the type of firm, we then aggregated all these responses (see below).

This report summarises the detailed feedback at an individual firm level. However, some firms have been excluded because we didn't have sufficient data for our analysis.

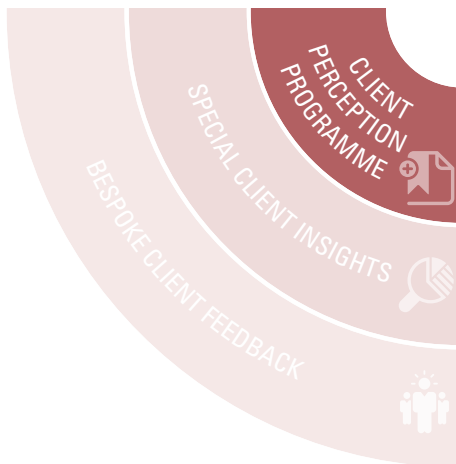
Firm	Firm type	Individual firm profile featured in this report?
A.T. Kearney	Strategy	
Accenture	Technology	
Aon Hewitt	HR	Insufficient data to profile
Bain	Strategy	
The Boston Consulting Group	Strategy	
Capgemini	Technology	Insufficient data to profile
Deloitte	Big Four	
EY	Big Four	
Hay Group	HR	
IBM	Technology	
KPMG	Big Four	
McKinsey	Strategy	
Mercer	HR	Insufficient data to profile
Oliver Wyman	Strategy	
PA Consulting	Management	
PwC	Big Four	



CLIENT PERCEPTION PROGRAMME



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The newest of our major research programmes, our **Client Perception Programme** is a suite of six reports which assesses the reputation of consulting firms, as seen by clients.

At the heart of the programme are two important questions:

- What is the reputation of a consulting firm?
- What influences a firm's reputation, and therefore what can be done about it?

The first sections of each report look at the broad themes in terms of the reputation of consulting firms, and the industry more broadly, in the geography in question. They consider the differences in the reputation of each type of consulting firm (usually **strategy firms, Big Four firms, HR firms and technology firms**) – attempting to explain how clients view them differently. And finally, in pointing to the different ways in which direct and indirect clients view a firm, they highlight the specific challenges that need to be addressed either during a project, or by marketing.

The last section provides information about what clients think of individual firms. It builds on the differences in the views of direct and indirect clients to assess the reputation of each of the world's leading consulting firms in terms of quality, characteristics and value for money, and examines the factors that influence clients' views of each firm.

Geographies covered in this programme:

- The USA
- The Nordics
- Germany
- The UK
- France
- The GCC

Also available on request:

- Details about our methodology
- A breakdown of the contents of a report
- A price list

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- Become more effective at delivery and marketing through a deeper understanding of the different reputational challenges and how to deal with these with clients and non-clients

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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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