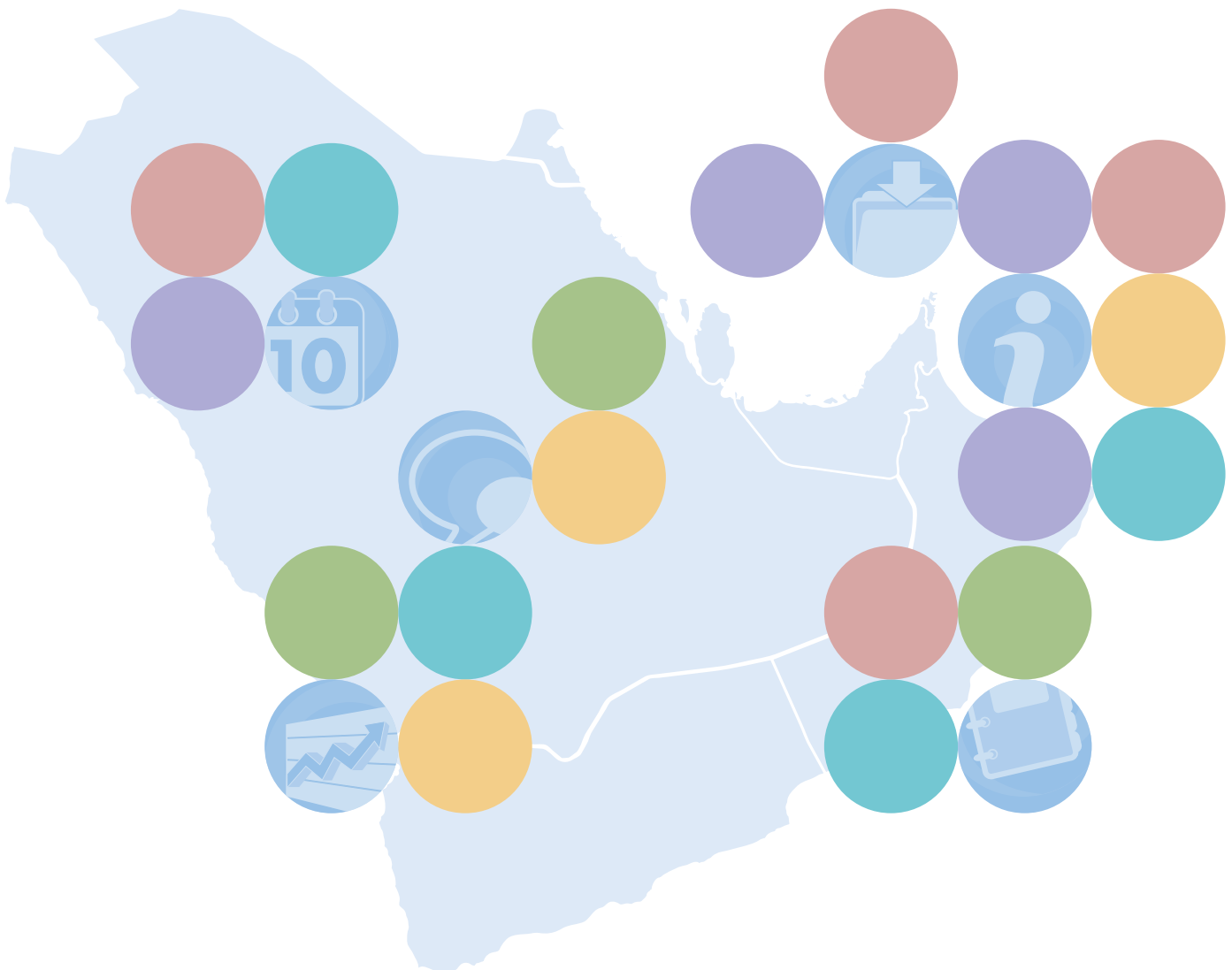


## CONSULTING MARKET PROGRAMME

# The GCC 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 sources of primary data:

## **Clients of consulting firms:**

We interviewed and surveyed 239 (typically C-suite) end users of consulting services across the GCC. The majority (94%) work for private sector organisations, many of which are multinationals. The remaining 6% 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 29 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 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 100 consulting firms.



## 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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