

The GCC Consulting Market in 2021

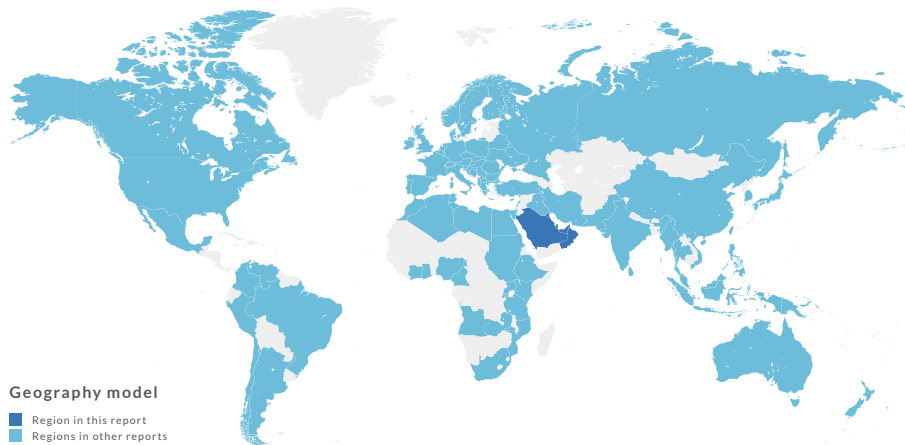
Market Trends Programme





What's included in this report

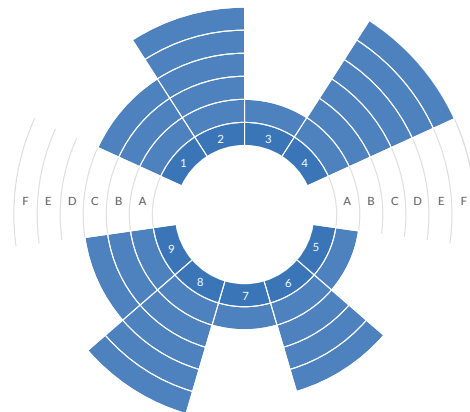
Our reports offer a wealth of market sizing, growth, and forecast data alongside engaging, in-depth analysis of the trends that matter. Using our highly flexible, multidimensional model we provide firms with robust, trusted data to make informed decisions about strategic investments and plan for the future.



Geography model

■ Region in this report
■ Regions in other reports

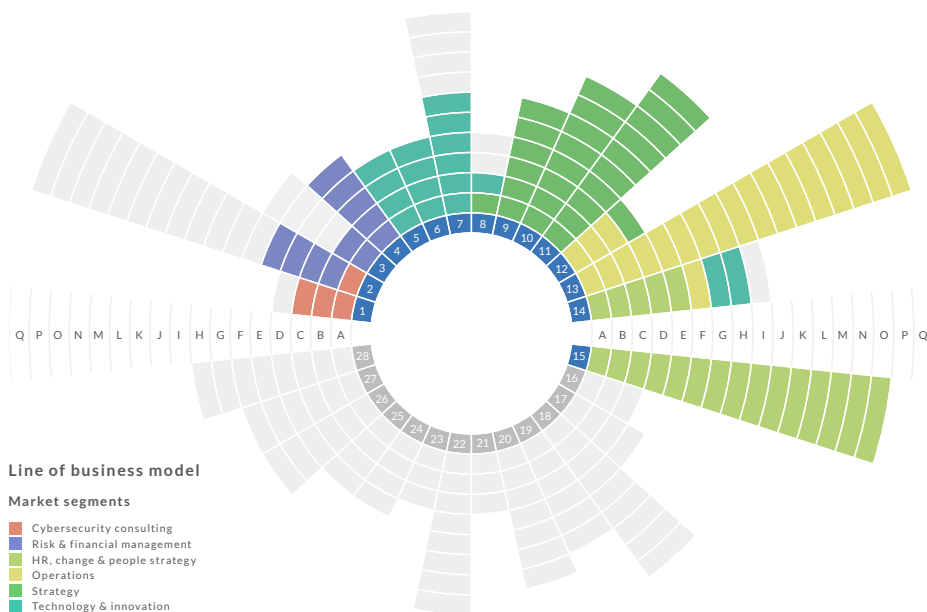
Albania	Canada	Germany	Kenya	North Macedonia	Saudi Arabia	Tanzania
Algeria	Chile	Ghana	Kuwait	Norway	Serbia	Thailand
Angola	China	Greece	Lebanon	Oman	Singapore	Tunisia
Argentina	Colombia	Hong Kong	Libya	Pakistan	Slovakia	Turkey
Australia	Côte d'Ivoire	Hungary	Luxembourg	Papua New Guinea	Slovenia	UAE
Austria	Croatia	India	Malaysia	Peru	South Africa	Uganda
Bahrain	Cyprus	Indonesia	Mexico	Philippines	South Korea	Ukraine
Belarus	Czech Republic	Iran	Morocco	Poland	Spain	United Kingdom
Belgium	Denmark	Iraq	Mozambique	Portugal	Sri Lanka	United States
Bosnia	Egypt	Ireland	Myanmar	Qatar	Sudan	Venezuela
Brazil	Ethiopia	Israel	Netherlands	Romania	Sweden	Vietnam
Bulgaria	Finland	Italy	New Zealand	Russia	Switzerland	Zambia
Cameroon	France	Japan	Nigeria	Rwanda	Taiwan	



Sector model

- Sectors**
- 1 Energy & resources
 - 2 Financial services
 - 3 Healthcare
 - 4 Manufacturing
 - 5 Pharma & biotech
 - 6 Public sector
 - 7 Retail
 - 8 Services
 - 9 Technology, media & telecoms

- Sub-sectors**
- 1 A Energy
 - 1 B Primary resources
 - 1 C Utilities
 - 2 A Banking
 - 2 B Capital markets
 - 2 C Insurance
 - 2 D Investment and wealth management
 - 2 E Private equity
 - 3 A Healthcare
 - 4 A Aerospace
 - 4 B Automotive
 - 4 C Construction
 - 4 D Consumer electronics
 - 4 E Consumer packaged goods
 - 4 F Industrial products
 - 5 A Pharma
 - 6 A Defence
 - 6 B Education
 - 6 C Not-for-profit
 - 6 D Public sector
 - 7 A Retail
 - 8 A Business services
 - 8 B Leisure
 - 8 C Logistics
 - 8 D Real estate
 - 8 E Transportation
 - 9 A High-tech
 - 9 B Media
 - 9 C Telecoms



Line of business model

Market segments

- Cybersecurity consulting
■ Risk & financial management
■ HR, change & people strategy
■ Operations
■ Strategy
■ Technology & innovation

Line of business

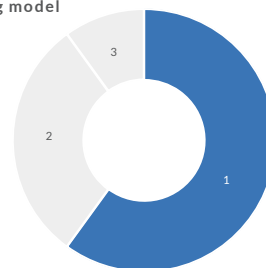
- 1 Cybersecurity
- 2 Risk
- 3 Forensic
- 4 Financial management
- 5 Design & UX
- 6 Innovation
- 7 Technology
- 8 Data & analytics
- 9 Research
- 10 Deals
- 11 Strategy
- 12 Real estate
- 13 Operations
- 14 Sustainability
- 15 HR & change
- 16 Architecture
- 17 Audit & assurance
- 18 Business process outsourcing
- 19 Civil engineering
- 20 Legal
- 21 Litigation
- 22 Marketing & creative
- 23 Network engineering
- 24 Product engineering & R&D
- 25 Recruitment
- 26 Software engineering
- 27 System integration
- 28 Tax

Capabilities

- 1 A Cybersecurity advice
- 1 B Cybersecurity incident response
- 1 C Penetration testing & wargaming
- 2 A Technology & security risk services
- 2 B Operational risk
- 2 C Programme risk
- 2 D Responding to regulation
- 2 E Risk management
- 3 A eDiscovery
- 3 B Forensic accounting
- 4 A Budgeting/financial planning process
- 4 B Debt advisory
- 4 C Finance function
- 4 D Financial advisory
- 4 E Financial restructuring & insolvency
- 5 A Corporate identity
- 5 B Customer journey & UX benchmarking
- 5 C Graphic & UI design
- 5 D UX & service design
- 6 A Ideation
- 6 B Innovation management
- 6 C Innovation strategy
- 6 D Strategies for growth from innovation
- 7 A Cloud advice
- 7 B ERP consulting
- 7 C IT strategy, planning & review
- 7 D IT training
- 7 E Programme management
- 7 F Vendor selection
- 8 A Advanced analytics
- 8 B Data visualisation, business intelligence & semantic layer
- 9 A Customer feedback
- 9 B Customer segmentation
- 9 C Employee feedback
- 9 D Environmental & social impact research
- 9 E Macro/microeconomic research
- 9 F Market research
- 10 A Capital allocation strategy
- 10 B Commercial due diligence & valuation
- 10 C Financial due diligence
- 10 D M&A transaction strategy
- 10 E Operational due diligence
- 10 F Portfolio & investment strategy
- 10 G Public-private partnerships
- 10 H Technology due diligence
- 11 A Business & financial modelling
- 11 B Category management
- 11 C Channel management
- 11 D Corporate recovery & turnaround
- 11 E Corporate restructuring
- 11 F Corporate strategy
- 11 G Market analysis & strategy
- 11 H Policy formulation
- 11 I Pricing
- 11 J Strategic sourcing/offshoring services
- 12 A Corporate, occupier services & facilities management
- 12 B Integrated real estate developer services
- 12 C Real estate deal/transaction services
- 12 D Real estate strategy
- 13 A Benchmarking
- 13 B Business continuity & recovery
- 13 C Cost cutting
- 13 D Customer service
- 13 E DevOps
- 13 F Distribution strategy
- 13 G Lean & Six Sigma
- 13 H Operational review
- 13 I Outsourcing advice
- 13 J Post-M&A integration
- 13 K Process design, re-engineering & automation
- 13 L Procurement/purchasing
- 13 M Property & estate management
- 13 N Sales & distribution planning
- 13 O Sales force effectiveness
- 13 P Supply chain management
- 13 Q Target operating model
- 14 A Purpose-led strategy & change
- 14 B Resource-efficiency implementation
- 14 C Resource-efficiency strategy
- 14 D Social impact & trust
- 14 E Sustainable workforce
- 14 F Sustainable supply chain
- 14 G Clean technology
- 14 H Green IT
- 15 A Benefits, compensation & pensions, excluding actuarial & investment advice
- 15 B Change management
- 15 C Diversity & inclusion
- 15 D Employee engagement
- 15 E Governance & board effectiveness
- 15 F HR strategy & effectiveness
- 15 G Leadership
- 15 H Organisational design & culture
- 15 I Organisational training & development
- 15 J Outplacement
- 15 K Pension fund evaluation & advice
- 15 L Performance management
- 15 M Stakeholder management
- 15 N Talent management
- 15 O Team effectiveness & collaboration

The revenue-earning model

- 1 Consulting
- 2 Managed service
- 3 Contingent fees





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About this report

Our report draws on four main sources:

- Our global data model covering the professional services market
- Our annual global client perception survey of senior end-users of consulting firms
- Our interviews with senior management consultants from a range of consulting firms
- Our in-depth desk research on the market

A detailed view of our methodology and more information about Source can be found below:

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The GCC consulting market in 2020

The GCC's consulting market arguably relies on two things more than anything else: freedom of movement for consultants and reliably high oil prices. So, in a year when consultants were confined not only to their country of residence but even to their homes, and when oil prices were not so much volatile as downright absurd, you can imagine what that did to the nerves of the average consultant in the region. Jangled? Certainly. Shredded? Possibly.

In the event, the 12.4% by which the GCC consulting market contracted in 2020 was no worse than the contraction in the global consulting market. It might have felt more painful to GCC consultants than it did to consultants elsewhere, partly because the market hadn't ever contracted before and partly because the twin-pronged crisis struck so precisely at the market's Achilles heel. But the prevailing emotion in the conversations we had with consulting leaders at the beginning of 2021 was one of relief. It could have been so much worse.

For a while, 2020 promised much. Most firms experienced an impressively strong start to the year as clients across the region pressed forward with transformation initiatives designed to prepare them for a future that would look very different from the past. For some, that meant redesigning their customer journey to make it fit for a digital age; for others it meant reconfiguring their nation's entire economy. Few consultants or clients imagined that change would arrive in the form it did or as quickly as it did. But the curious thing, and perhaps the market's saving grace, was that much of what clients were already doing was every bit as relevant as a response to a pandemic as it had been as a response to emergent technologies or the need to diversify economies.

Still, when the crisis hit it hit hard: Nervous clients put projects on hold, particularly where it became clear that the bottom had fallen out of their own market. Sectors like retail, hospitality, and aviation quickly shut up shop, and these are expected to remain very tough places for consultants to win business until restrictions ease and tourists return. Clients that had tended to use consultants in the grey space between consulting and BPO drew clearer lines of demarcation between the two and made sure they were only paying consulting fees where consultants were required. Even financial services clients retrenched, deferring regulatory projects where they could and threatening one of the most reliable sources of revenue for some big firms. And pressure on prices intensified everywhere. Very few consulting firms had a good summer, and those that did are likely to have been beneficiaries of the region's nascent restructuring market.

In the event, the 12.4% by which the GCC consulting market contracted in 2020 was no worse than the contraction in the global consulting market.



The client perspective

Details of our survey methodology are [here](#). Please note that we had a relatively small number of respondents from the pharma and healthcare sectors, both of which are still in their (relative) infancy but are important areas of investment in the GCC region, and from the public sector. We included data from these sectors as a point of comparison, but it should be regarded as directional only.

The crisis may not be over, but clients are starting to look to the future

The impact of the pandemic varied massively by client size and sector

GCC clients offer a split verdict when asked about the impact COVID has had on their businesses. While 45% said the crisis had a negative impact, 41% said that 2020 was a good year for them. That left 14% saying their businesses were unaffected by the economic and social impacts of the pandemic.

When we dig in a little further, we find that upper-mid-sized organisations (those with between 1,000 and 4,999 employees) seemed less likely to have been affected by the troubles of 2020 than larger clients, as 18% of these clients claimed the crisis had no impact, compared to just 10% in organisations with 5,000+ employees. However, larger organisations in the GCC were also more likely to have felt a very positive impact (32%) compared to upper-mid-sized organisations (20%). And just as experience of the pandemic varied by client size, it also varied by sector. For instance, manufacturing clients overwhelmingly report a negative experience, with 78% of respondents reporting such. Things were also difficult in the energy & resources sector, with 60% of clients saying their businesses suffered to some degree. In the financial services, healthcare, and services sectors, however, at least half of respondents say the crisis had a positive impact on their organisation.

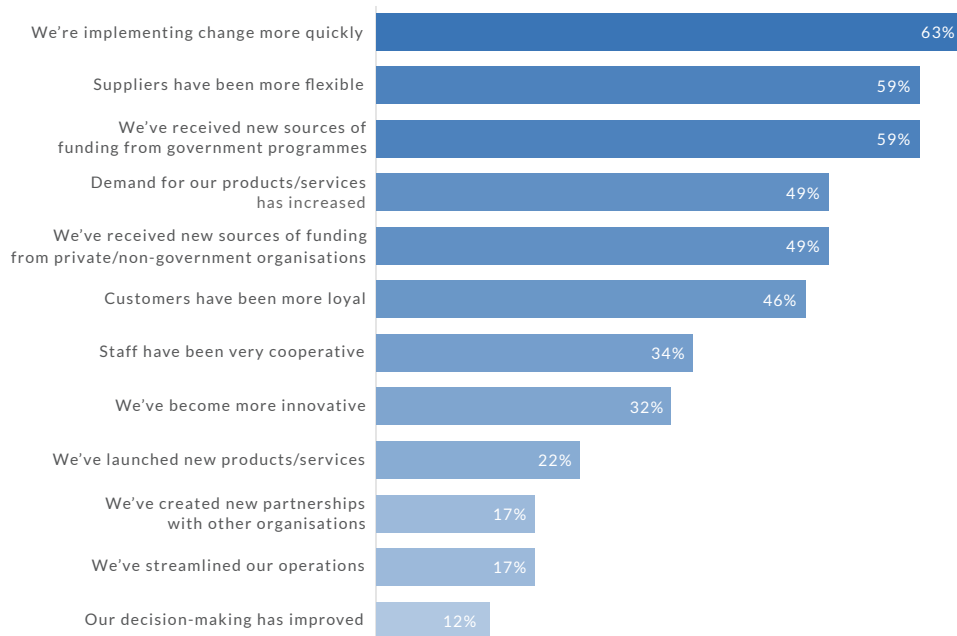
Around two-thirds of those who fared well found that the crisis empowered them to implement change more quickly, and many (59%) also report benefiting from the flexibility of suppliers. A significant proportion of this client group (59%) said new sources of government support and funding helped to make 2020 a good year, something clients in the financial services sector particularly found to be true. For those less fortunate, the most cited culprit was a decline in sales. This was crushingly the case for manufacturing, with 82% of clients saying this was a significant issue. Meanwhile, 83% of clients in the energy & resources sector had problems managing cash flow.

While 45% said the crisis had a negative impact, 41% said that 2020 was a good year for them.

**Figure 4**

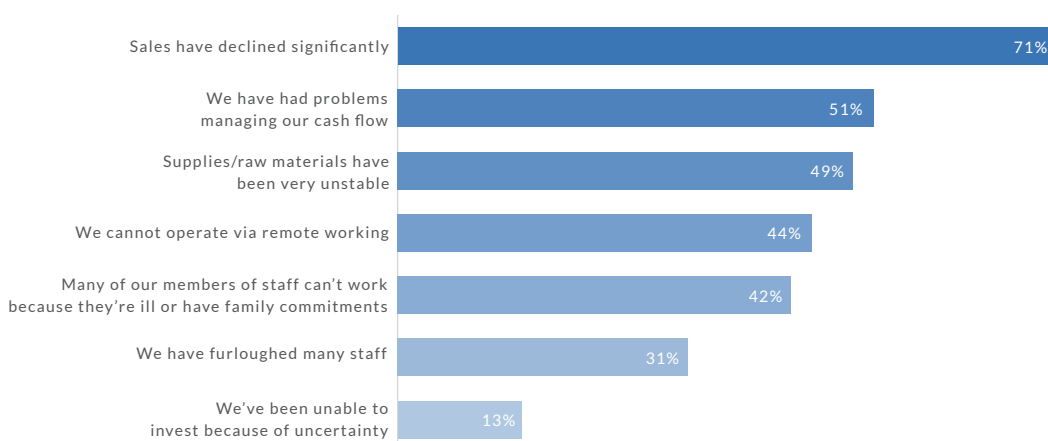
The reasons given by GCC clients who say the crisis had a positive impact

Note: Respondents were asked to select all the statements they agreed with

**Figure 5**

The reasons given by GCC clients who say the crisis had a negative impact

Note: Respondents were asked to select all the statements they agreed with





— Insights from consultants

Interviews with consulting leaders

At Source, we have always believed that the only way to truly understand a consulting market is to have real conversations with the consultants who are on the ground working in that market, serving their clients day in and day out. Below, you'll find condensed versions of our most recent discussions with consultants in the GCC, as they reflect on 2020, tell us how the previously unimaginable events of last year are reshaping the market, and in the case of a few brave souls, venture a guess as to what comes next.



Tim Parr, CEO Consulting, Deloitte Middle East, Deloitte

How has the year been for Deloitte in the GCC?

It's been surprisingly good. This is our third year of a fairly intensive investment programme; we grew very well for the first two of those and had been planning for another year of very strong growth this year but did a lot of scenario planning and revised our forecasts downwards once the crisis struck in spring 2020. In actual fact we've just completed the first half of our financial year and our growth year-to-date is very strong and well ahead of our plans. The fact that the rate of growth is a bit less than it has been in previous years is partly a self-fulfilling prophecy—if you think you're going to grow more slowly then you don't hire as many people—so we're in a situation now where the rest of our financial year is going to be determined by our recruitment efforts.

How has the crisis impacted you?

The first thing that was a surprise when the crisis hit was that the work we were already delivering continued to be delivered successfully without much interruption. The areas that suffered were those where the sales cycle is shorter, and that meant the summer was tougher in those areas. Through the summer and right up to now at the end of the year we have been experiencing very strong demand in the market. Analytics, Digital, and Customer and Marketing teams, for example, are all extremely busy. From my perspective everything that's happened has accelerated the speed with which the market is moving in our direction. We're focused on delivering end-to-end transformations to our clients enabled by strong technology and digital offerings and that's the part of the market that's rebounding and accelerating most.

How have travel restrictions impacted a market that's always relied so heavily on fly-in fly-out?

There have been a lot of logistical issues with travel restrictions across the region, and there has been a big push to get more local people working in local markets. But that's actually going very well. Most of the ground we're making in Saudi Arabia is driven by the fact that we're hiring a lot of young Saudis. Fifty to sixty percent of our resources in the Kingdom are now Saudis. It's harder to hire locally at the senior level, but as we promote people, we'll shift the balance at senior levels further.

How has public sector expenditure held up against the backdrop of not only COVID but the

problems there have been with oil prices?

The public sector is still the powerhouse in the region and it's generating a lot of digital transformation work. It's a slight exaggeration but I almost struggle to remember an RFP that hasn't had something to do with digital in it recently. Every government department is looking at digitisation in the front office, and there's a lot of work on core systems and ERPs too. We were almost as worried about what happened with oil prices as we were about COVID but although the energy & resources market has been a bit slower, it doesn't seem to have had an acute effect. I do think it's made a lot of organisations more cautious than they were before though.

How has the market been in the UAE?

Abu Dhabi is investing heavily in developing a more diversified economy and I think it will be a strong market for consulting for the foreseeable future. Dubai has probably suffered more due to the nature of its economy from COVID shutdowns but is bouncing back strongly and its strong hospitality and retail sector has opened up again for business. I'm sure these sectors will be very innovative in years to come. We're launching a big digital and creative studio in Dubai in early 2021 that we'll use as a platform to bring our strong consumer and retail capabilities into the UAE.

And what about financial services?

The big thing in the financial services sector right now is either banks wanting to go digital or new banks wanting to set up as digital banks. There's also some M&A activity and I think there's going to be a lot more consolidation.

What about the biggest challenges?

It's been a very competitive market and that's resulted in a lot of pressure on price. There's a lot of evidence of people pricing below normal profitability levels, and even at cost, to win work. The way to deal with that is not to get involved in discounting and a race to the bottom, especially if focused on quality, but instead to transform your cost to serve. You need the right delivery models, which includes thinking about how you use lower-cost delivery models including offshore. Secondly, you've just got to keep coming up with propositions that are differentiated. It's why we're very much focused on transformation and delivering business outcomes through technology innovation.



About this report

Methodology

Sources

Megamodel: our global data model

The quantitative market data in this report comes from our unique model of the global professional services market.

Rather than making high-level assumptions, this model has been built from the bottom up, sizing the market capability by capability—assessing how much work a firm earns delivering each professional capability within each sector and country. This results in a robust view of the size of the supply-side market, which can then be broken down to view the size of the market by country, sector, line of business, capabilities, and market segments.

This year's model has been expanded, with a new capability taxonomy and a much broader range of professional services firms included—all of which reflects convergence and other changes we see in the industry. For the purposes of this report we've focused on types of firm and market segments that broadly equate to traditional definitions of consulting. As a result of these changes to our methodology, there are changes to our market sizing data, which take into account that conventional consulting firms now compete in many non-consulting markets—in essence that their addressable market is larger. Historic data has been restated to match our new definitions, but the inclusion of new types of firm and additional services may also have an impact on growth rates.

Alongside this market segmentation, we also limit our market sizing and analysis to what we at Source call “big consulting”—work done by mid- and large-sized firms (those with more than 50 people). Please note that we don't track the long, thin tail of work done by contractors and very small firms, as most readers of this report would

not seek or be able to compete in this part of the market.

All of the data in the model is calibrated through extensive interviews with, and surveys of, professional services firms and their clients, allowing us to discuss broader trends in the market alongside detailed dimensions such as headcount. These interviews and surveys are supplemented with desk research, which allows us to assess the impact of wider macroeconomic trends on professional services. This, combined with our detailed modelling, results in a long-term view of the market that is able to support both historic and forecast data.

All figures given in this report are in US dollars. For reference, Source is using the following exchange rates in its reports this year:

US dollar to British pound US\$1 = £0.78

US dollar to euro US\$1 = €0.87



Client perspective

We carry out a client survey to help us build a rich picture of how different trends in the GCC are affecting clients' organisations and their use of consulting. This survey focuses on trends in the GCC, providing detailed insights into the nuances of the market. For this, we surveyed 100 senior clients of consulting firms from across the GCC, all of whom work in organisations with more than 1,000 employees. This survey focuses on the following areas:

- How they expect to use consultants during 2021 and the first half of 2022
- Factors that affect the way clients work with consulting firms
- The ways consulting firms market themselves to clients and the impact this has on client decision-making

Figure 35

Respondents by sector

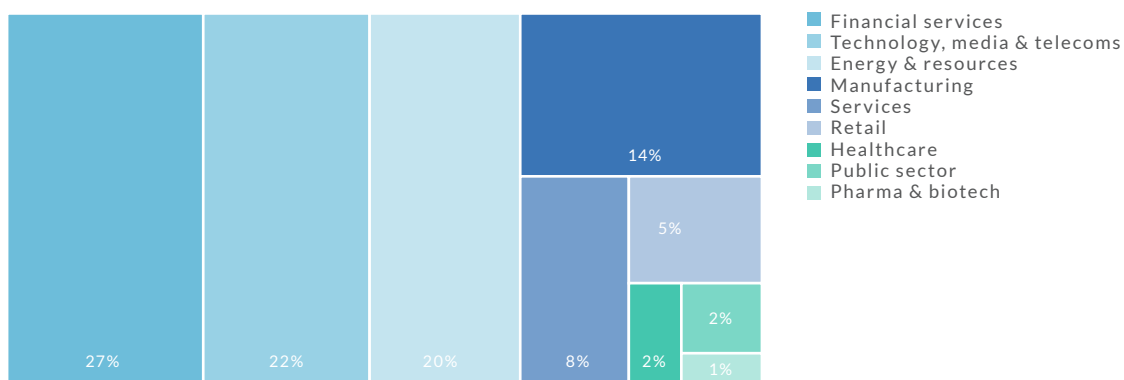


Figure 36

Respondents by organisation size

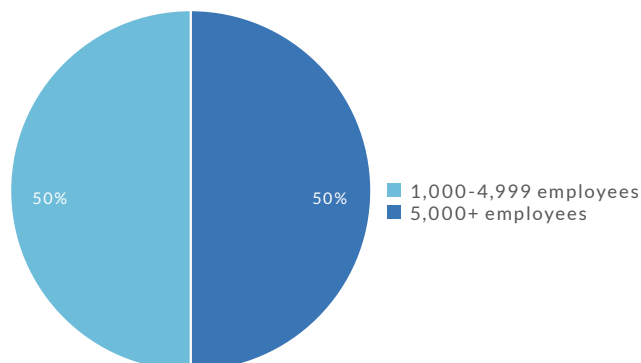
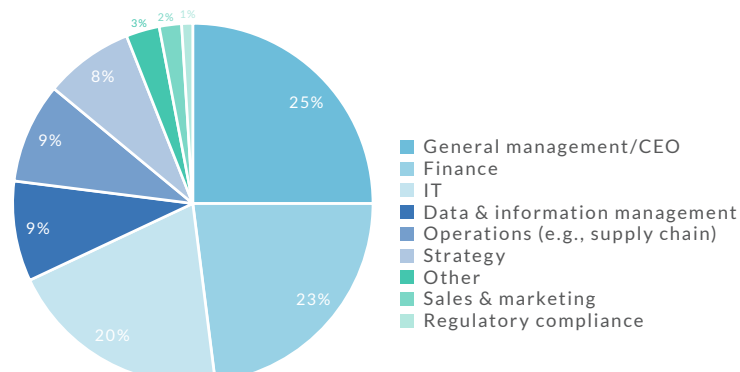


Figure 37

Respondents by function



Interviews with senior consultants

In addition to our quantitative research, we interviewed 16 very senior consultants in the GCC, representing most of the leading consulting firms in the geography and many smaller local specialists to understand more about how the consulting market is performing and the major trends, changes, and challenges consultants and their clients face. Throughout the year, Source analysts remain plugged into the global consulting market through our bespoke research and consulting projects, adding further depth to our understanding of the consulting industry.

In-depth desk research

We also conducted a thorough PEST analysis in the GCC that drills down into finer macroeconomic details on a holistic and sector-by-sector basis and allows us to fit our research into a wider macroeconomic picture.

Definitions of sectors and market segments

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
- 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.

For more information about how we classify consulting services and sectors, please see “Definitions of sectors and market segments”.



Definitions of sectors and market segments

Sectors



Energy & resources

Energy

Includes the exploration and production of energy, including oil, gas, coal, and renewables.

Utilities

Includes the delivery of electricity, gas, water, sanitation, and other related services.

Primary resources

Includes agriculture, chemicals and chemical products, commodities, forestry, fishing, metals, mining, and plastics.



Financial services

Banking

Includes retail banking, commercial banking, and lending.

Insurance

Includes general insurance (e.g., motor, home, pets, health—anything on an annual contract), life insurance, pension products, and retirement planning.

Private equity

Includes both consulting work for private equity firms and consulting work with private equity portfolio businesses.

Capital markets

Includes investment banking, trading of stocks and financial products, corporate finance, and broking.

Investment and wealth management

Includes private banking, high net-worth banking, investment management, trust funds, the management of pension funds, and asset management.



Manufacturing

Aerospace

Includes space research and technology, the manufacture of aircraft, aircraft parts, rockets and other space equipment, and tanks and ammunition.

Automotive

Includes the manufacture of motor vehicles, industrial vehicles, and vehicle supplies and parts.

Construction

Includes surveying, architectural, and engineering services, heavy construction, house building, and the building of infrastructure.

Consumer packaged goods

Includes the manufacture of clothes, foods, alcohol, tobacco, furniture, home furnishings, cleaning products, small arms, children's toys, and sports equipment.

Consumer and industrial electronics

Includes electrical components, household and industrial appliances, commercial and professional equipment.

Industrial products

Includes industrial machinery, steel and metal products, and plastic products.



Pharma & biotech

Includes research into and the production of drugs, biological products, medicinal chemicals, and life sciences.



Healthcare

Includes private and publicly-funded healthcare, hospitals, laboratories, and medical equipment.



Public sector

Government

Includes federal/national, state/regional, local government, emergency services, justice, social services, public transport, and conservation.

Education

Includes public and private schools, universities, and libraries.

Defence

Includes national security and consulting around defence issues.

Not for profit

Includes non-commercial research organisations, religious, political and professional membership organisations, trusts, labour unions, and business associations.



Retail

Includes the selling of clothes, food, consumer goods, and automobiles.



Services

Logistics

Includes warehousing, storage, packing and crating, and distribution including cargo, freight, and haulage.

Business services

Includes services relating to law, accountancy, IT maintenance, security systems, advertising, employment agencies, and vehicle leasing.

Leisure

Includes museums, art galleries, theatre, golf courses, hotels, hospitality, travel agencies, restaurants, and bars.

Real estate

Includes estate agencies and operators of residential and commercial buildings.

Transportation

Includes private and people-related transportation, including airlines, airport management, train operators, rail infrastructure management, water transportation, courier services, and private bus services.



Technology, media & telecoms

Telecoms

Includes telephone, mobile, digital, and other communication services.

High-tech

Includes IT-related devices, computer and computer-related devices, audio and video equipment, broadcasting and communication equipment.

Media

Includes radio, television, and digital broadcasting stations and services as well as printing and publishing of newspapers, periodicals, and books.



Market segments

We've taken the lines of business and capabilities from our taxonomy that broadly align with traditional definitions of consulting and divided them into market segments that include the following. Please note that for some lines of business, for example, forensics, we've taken a subset of the relevant capabilities and excluded others.



Technology & innovation

Ideation, Innovation management, Innovation strategy, Strategies for growth from innovation, Cloud advice, ERP consulting, IT strategy, planning & review, IT training, Programme management, Vendor selection, Clean technology, Green IT, Corporate identity, Graphic & UI design, UX & service design, Customer journey & UX benchmarking, Data visualisation, business intelligence & semantic layer.



Strategy

Capital allocation strategy, Commercial due diligence & valuation, Financial due diligence, M&A transaction strategy, Operational due diligence, Portfolio & investment strategy, Public-private partnerships, Technology due diligence, Business & financial modelling, Category management, Channel management, Corporate recovery & turnaround, Corporate restructuring, Corporate strategy, Market analysis & strategy, Policy formulation, Pricing, Strategic sourcing/offshoring services, Real estate strategy, Environmental & social impact research, Macro/microeconomic research, Market research, Customer feedback, Customer segmentation, Employee feedback, Advanced analytics, Sustainable investment.



Cybersecurity consulting

Cybersecurity advice, Cybersecurity incident response, Penetration testing & wargaming, Technology & security risk services.



HR, change & people strategy

Benefits, compensation & pensions, excluding actuarial & investment advice, Change management, Diversity & inclusion, Employee engagement, Governance & board effectiveness, HR strategy & effectiveness, Leadership, Organisational design & culture, Organisational training & development, Outplacement, Pension fund evaluation & advice, Performance management, Stakeholder management, Talent management, Team effectiveness & collaboration, Resource-efficiency strategy, Purpose-led strategy & change, Resource-efficiency implementation, Social impact & trust.



Operations

Benchmarking, Business continuity & recovery, Cost cutting, Customer service, DevOps, Distribution strategy, Lean & Six Sigma, Operational review, Outsourcing advice, Post-M&A integration, Process design, re-engineering & automation, Procurement/purchasing, Property & estate management, Sales & distribution planning, Sales force effectiveness, Supply chain management, Target operating model, Sustainable supply chain, Corporate, occupier services & facilities management, Integrated real estate developer services, Real estate deal/transaction services.



Risk & financial management

Operational risk, Programme risk, Responding to regulation, Risk management, Budgeting/financial planning process, Debt advisory, Finance function, Financial advisory, Financial restructuring & insolvency, eDiscovery, Forensic accounting.



Contributors

We are extremely grateful to all the people we spoke to for making this report possible. Below is a list of individuals who have contributed (excluding those consultants who wished to remain anonymous).

Name	Job title	Organisation
Imad Abuizz	Digital Platform Leader	PwC
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Jonathan Holmes	Managing Director Middle East & Africa	Korn Ferry
Wasim Khan	MENA Consulting Leader	EY
Rafael Lemaitre	Partner	Sia Partners
Rami Nazer	Middle East Advisory Partner	PwC
Pedro Oliveira	Partner, Middle East & Africa Head	Oliver Wyman
Tim Parr	CEO Consulting, Deloitte Middle East	Deloitte
Gianmario Pisanu	Managing Director – Consulting Lead – Middle East & Turkey	Accenture
Visar Sala	Managing Director of Accenture Strategy	Accenture
Rene Seyger	Managing Partner Middle East	Roland Berger
Chris Seymour	Managing Director	Mott MacDonald
Arvind Singhi	Head of Clients & Markets MESA	KPMG Saudi Arabia
Farhan Syed	Partner, Head of Advisory - Middle East and South Asia	KPMG
Dr. Markus Wiesner	Partner	Heidrick & Struggles



About the authors

Edward Haigh

Ed is a Managing Director of Source, and he is particularly focused on HR, strategic marketing, and new product development. He is a key member of the Source research team and spends much of his time interviewing consultants and their clients around the world in order to identify and explore major market trends. Ed regularly speaks about the consulting market to leadership teams around the world, has lectured at Columbia University (New York), Imperial College (London), and Vrije Universiteit (Amsterdam), and he is regularly quoted by media including the Wall Street Journal, the Washington Post, the Financial Times, Bloomberg, and the trade press. Prior to joining Source in 2008, Ed spent seven years in various marketing roles for Sony Europe.

Edward Haigh

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Sophie Gunn

Sophie joined in November 2020 and is an Analyst in our consulting practice area. She supports bespoke project work and report writing, analysing the results of our client surveys and interviews. Before joining Source, Sophie completed a History degree at the University of Edinburgh and spent over two years working at a boutique management consultancy as a research analyst.

Sophie Gunn

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Programme schedule for 2021

Reports 2021		Market Trends Programme	Client Perception Studies	Emerging Trends Programme
Q1	January	Forecasts for 2021 US GCC UK Nordics Canada	UK US	
	February		Germany Financial Services	
	March		Healthcare & Pharma GCC France	Buying and Selling
Q2	April	DACH France South America Australia China Japan South East Asia Benelux India Southern Europe Eastern Europe & Russia	Nordics Energy & Resources Technology, Media & Telecoms	
	May		China Japan	Beyond Digital
	June			
Q3	July	Africa Energy & Resources Financial Services		
	August		Perceptions of Risk Firms Perceptions of Tax Firms	Investing for Growth
	September		Perceptions of Audit Firms	
Q4	October	The Global Tax Advisory Market The Global Risk & Cybersecurity Services Market Healthcare & Pharma Technology, Media & Telecoms Consumer Products & Retail Planning for Growth in 2022		Building a Trusted Brand
	November			
	December			

Please note that with the purchase of all Market Trends reports in 2021, you will also gain access to a monthly video summary on the global market, presented by Fiona Czerniawska.

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Source analyses the way in which economic, business, behavioural, and technology change drives how organisations use professional services, and the implications that has for professional services firms.

Since its inception in 2007, Source has invested in sophisticated, proprietary research techniques that not only provide unique insights on current and future trends in the market, but also provide a better and faster solution than you would be able to reach yourself.

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