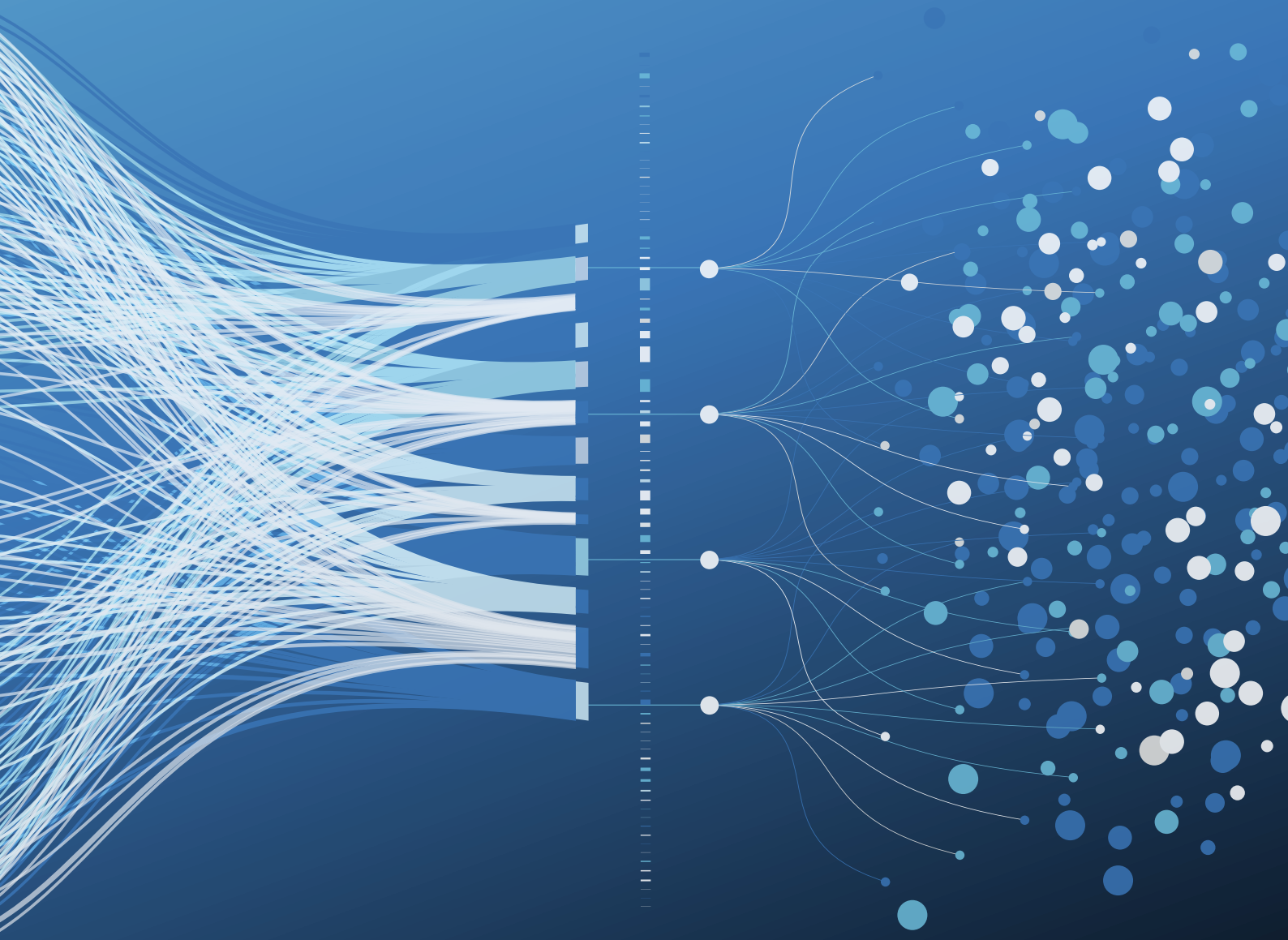
August 2021

EXTRACT

The South America Consulting Market in 2021

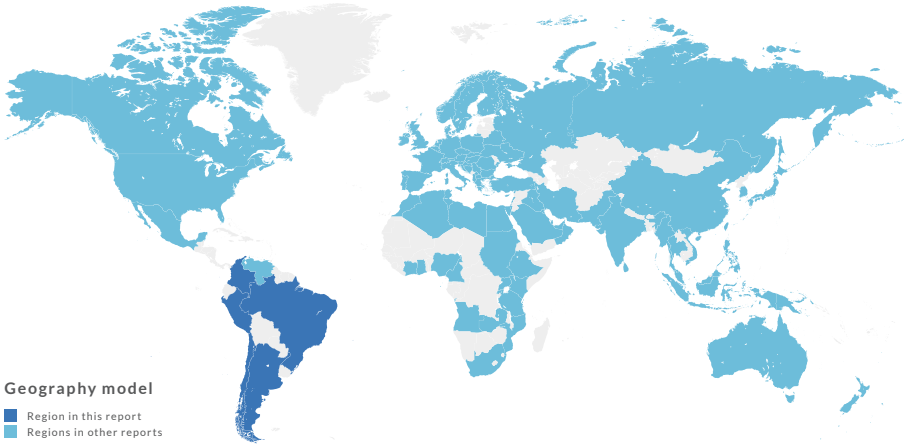
Market Trends Programme



SOURCE GLOBAL RESEARCH

What's included in this report

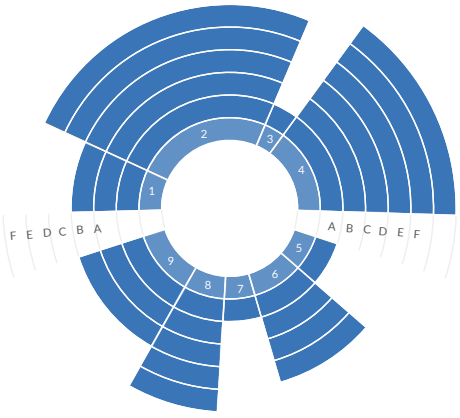
Our reports offer a wealth of market sizing, growth, and forecast data alongside engaging, in-depth analysis of the trends that matter. Using our highly flexible, multidimensional model we provide firms with robust, trusted data to make informed decisions about strategic investments and plan for the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



Geography model

- Region in this report
- Regions in other reports

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



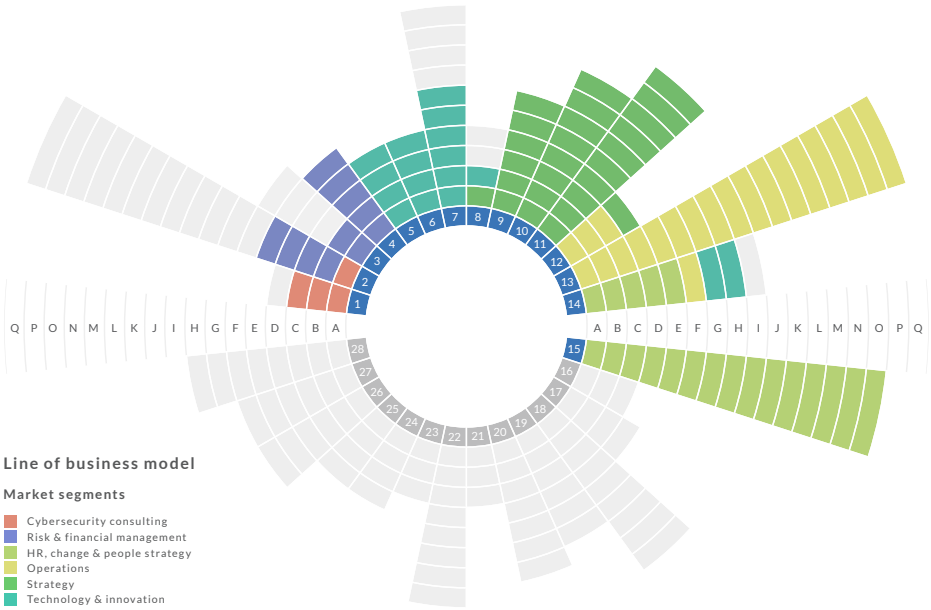
Sector model

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



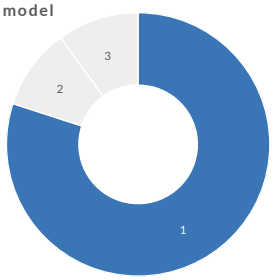
Line of business model

Market segments

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

The revenue-earning model

1 Consulting
2 Managed service
3 Other (contingent fees, software licensing, associate networks)



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

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The South America consulting market in 2021

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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 South America consulting market in 2020

South America has been a tricky market to navigate for consultants in recent years. Whether because of widespread corruption scandals, political upheaval, or economies doing the recession hokey cokey, firms in the South America market had dealt with a variety of disruption in the years leading up to 2020. So, in some ways, the COVID-19 pandemic was just another in a long series of disruptors in the market. But in others, the impact was much more profound, both on society and the consulting market. Indeed, with among some of the highest infection rates in the world, and a decidedly mixed performance from governments throughout the region, South America's consulting market took more of a beating than many other geographies, with revenues slipping 7.7% in 2020.

From a country perspective, consultants in Brazil—the region's largest consulting market accounting for nearly half of all consulting revenues—faced an array of uncertainties as the pandemic hit the country hard. And the difficulties of COVID-19 were only exacerbated by the political toing and froing around exactly how the federal and state governments would respond to the challenges the country was dealing with. As a result, the lull in demand triggered by the arrival of COVID-19 lingered somewhat longer in Brazil than elsewhere in the region. That's not to say that the prolonged pandemic malaise impacted the whole market evenly. There was a sharp uptick in pharma & biotech demand as clients invested to rapidly digitise their R&D operations as part of the sector's push for COVID-19 vaccines and treatments. Firms also saw demand from pharma & biotech clients bolstering their value chains and revamping their sales operations as travel restrictions put paid to the traditional face-to-face business model. The TMT sector was the other sector to grow in Brazil last year with high-tech clients investing to roll out new services. Meanwhile clients in the large telecoms industry invested heavily to boost network coverage amid a surge in remote working.

With Argentina struggling to emerge from nearly a decade of dipping in and out of recession in the run up to the pandemic, the disruption of COVID-19 on business confidence was perhaps slightly less severe than elsewhere in the region. Similar to Brazil, pharma & biotech was the fastest growing market in Argentina, with TMT consultants also seeing an uptick in demand amid a surge in work to expand network capacity and reliability. All other sectors contracted, with a deeper contraction in public sector demand in Argentina than other markets as years of recession weighed on the public coffers, resulting in reduced demand

So, in some ways, the COVID-19 pandemic was just another in a long series of disruptors in the market.

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in all but the most essential public services and putting extreme pressure on fees when firms were called upon to help.

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The client perspective

The crisis takes its toll

Roughly two-thirds (65%) of respondents say the impact on their business has been negative, while only about a quarter (26%) say it's been positive.

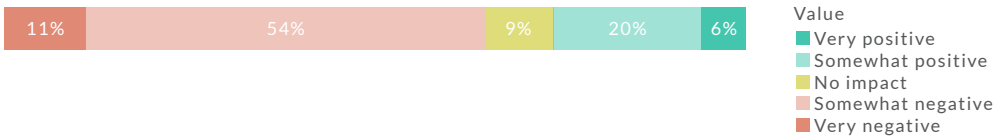
If there was ever any doubt about how hard the last year or so has been for client organisations in South America then our survey appears to dispel it: Roughly two-thirds (65%) of respondents say the impact on their business has been negative, while only about a quarter (26%) say it's been positive.

Comparisons with other regions are problematic here, partly because the timing of our survey has varied slightly from one region to the next, and partly because respondents from the largest organisations (with more than 5,000 employees globally) are slightly under-represented in our sample for South America compared with elsewhere, but the differences are still stark. Globally, the proportion of people who say the crisis has had a negative impact is just 49%, while 38% think it's been positive.

If that's striking, then so are the reasons for the negativity in South America. While clients elsewhere tend to talk about falling demand for their services as the biggest reason for them having had a negative experience so far, in South America the biggest issue is a more of a direct consequence of the virus: Staff members are either unwell or are unable to work because of family commitments. With the same caveats as above, that explanation is only 6th on the list elsewhere. It's been a tough time for clients everywhere, but it's possibly been tougher in South America than pretty much anywhere else.

Figure 4

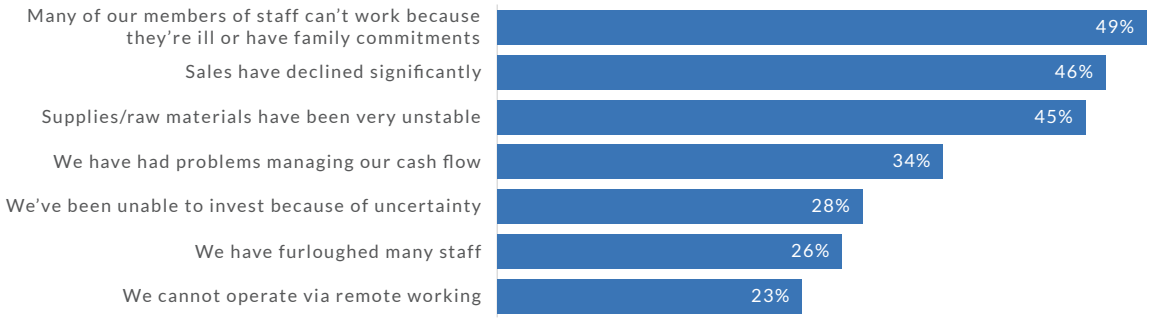
Clients in South America generally think that the crisis had a negative impact on their business



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Figure 5

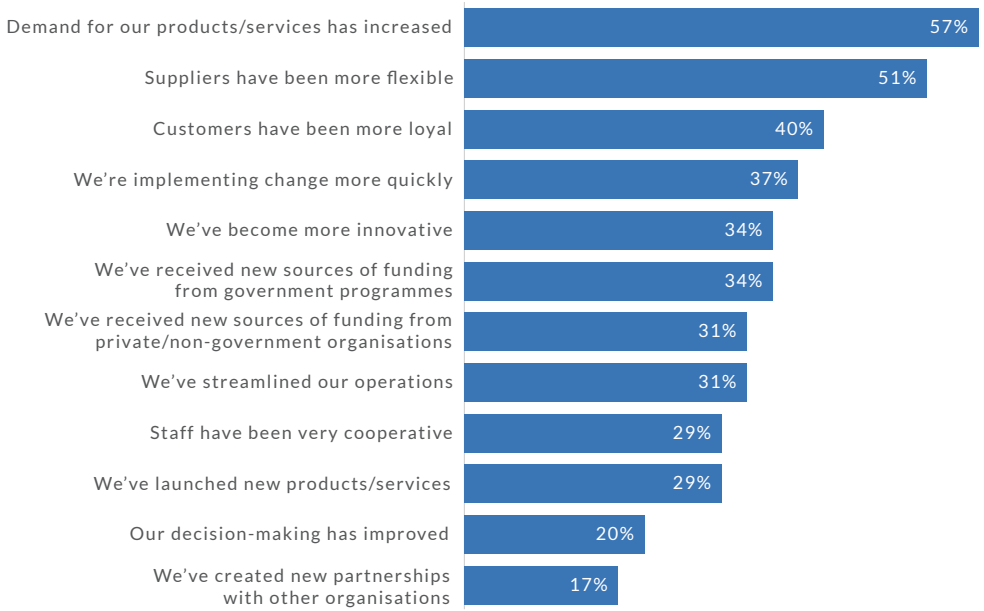
Those who say that the crisis has had a negative impact on their organisation point to the direct effects of the virus above everything else



Still, we shouldn't ignore the 26% who, in spite of all these difficulties, think the crisis has actually had a positive impact on their organisation. Among them, the cause of positivity is most likely to be an increase in demand for their products or services, but the flexibility shown by suppliers is also mentioned prominently.

Figure 6

Clients who say the impact of the crisis was positive say it's because demand has been higher



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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 South America's consultants, as they reflect on 2020, telling us how the previously unimaginable events of 2020 are reshaping the market, and in the case of a few brave souls, venturing a guess as to what comes next.

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Andrea Airaghi, Senior Partner, Business Integration Partners

How did the consulting market perform in South America in 2020?

It was really difficult to separate the effects of COVID-19 from the broader trends of the consulting market, but we didn't see a significant drop in market opportunities last year. The pre-COVID situations in Brazil, Chile, and Colombia differed from one another from a consulting perspective, but as far as performance, none of them suffered much and we were able to beat our budgets.

Our experience of the markets in Brazil and Colombia, in particular, was that there was a very fast reaction to the pandemic. We saw a couple of months of hesitation in the early days of the pandemic before transformation programmes started to recover. The situation in Brazil was vaguer for longer, though, and clients there were noticeably slower in rethinking their priorities. We were fortunate to already be involved in a great number of transformation programmes pre-COVID, and so even in Brazil our performance didn't suffer that much.

Our strongest-positioned industries in South America—TMT, energy & resources, and financial services—proved to be more resilient to the crisis than some others, such as retail and consumer goods. I think that resilience has been thanks to the evolution of certain digital capabilities on the client side, and they were able to get used to interacting with consultants in a new way. That positivity has continued to 2021, which is going very well so far.

Did the collapse of oil prices affect demand and the type of work energy & resources clients were asking for?

Honestly, we didn't suffer at all. The fact that most of our involvement in the energy & resources space is around clients' digital transformation rather than their downstream activities meant that we were probably playing from the most favourable angle in the industry. We were, and are, helping clients push toward something the pandemic has only accelerated and that remains key to their future strategy.

Did the pandemic drive any change in what clients wanted from digital transformation?

Yes, absolutely. Digital transformation had always been a little bit vague, on both the consulting end and the client side—at least in terms of how it's defined and the ingredients it requires. In the second half of 2020, we saw increased client demand for data analytics and AI capabilities, with a view to putting organisations in a position where they could make real, data-driven decisions. At the same time, we saw less demand for service design and UX and UI design. Those were areas driving a lot of demand before the pandemic, with everyone wanting support around interface and design, but once the pandemic hit, the vast majority of clients wanted to focus more on the data side.

How did your firm and the clients you serve take to working in a purely remote environment?

It was actually not an issue at all, and the extent to which we could continue to perform remotely really surprised me. The fact we could deliver remotely wasn't so surprising, as we were already doing a lot of this, but I was surprised to see how successfully we were in moving to remote business and sales activities, because that had always been so much about the personal experience and personalised relationship management. We even found success transforming prospects into clients remotely.

The pandemic was such a strong force of change, that remote working quickly became normal across the entire ecosystem, even if that meant starting off with cold calls. Nevertheless, generating new work has been one of the biggest challenges. In the post-pandemic world, instead of looking at potential clients individually, you have to find an intelligent way of putting together individuals who are interested in a shared topic. That might mean creating a lab or a workshop around that topic. And on the positive side, that's something different and creative that we can now do easily while we weren't able to do it before. With these new capabilities, we've been able to create some interesting business connections and immediately follow up with new ideas and even proposals. In some cases, this happens even faster than before.

Looking at our internal experience, keeping the mood of a project team the same as it was before the shift to fully remote work was probably the biggest issue we faced in 2020. It required early investment in activities that make people feel part of a unique team, even if they're not meeting in person. A lot of the events and social occasions that are, in some ways, the bread and butter of consulting firms have been lost.

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What steps did you take to improve the process of remote recruiting and onboarding?

First of all, we saw a decrease in people's willingness to change their career or company, because no one wanted to sacrifice any stability last year, so we really had to foster our recruiting machine to find additional talents. On a positive note, that meant a decrease in the churn rate of our resources. Recruiting candidates coming from university was as easy as it was before. but having them enter our firm and build new relationships virtually without the human touch was difficult.

To what extent do you think remote working will remain part of the consulting model?

I think the vast majority of activity will remain remote. Clients realise they can survive without having consultants close to them day and night, and there's also the positive impact it has on P&L for both clients and consulting firms. We've also seen an improvement in the technologies we're all using, which is allowing for nicer ways of interacting in the virtual environment.

Do you think the various upcoming elections across South America will impact consulting demand over the next 18 months or so?

I'm sure there will be some level of disruption in consulting demand. Taking past Brazilian elections as a benchmark, I can say we usually see a huge slowdown in consulting activity ahead of the election in industries we're not particularly strong in, such as retail and consumer goods. But in industries where we run long-term programmes—such as energy, banking, and telecoms—we have tended to remain more resilient through elections. I would anticipate less disruption elsewhere in the region, though, based on our previous experiences in the market.

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About this report

5

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

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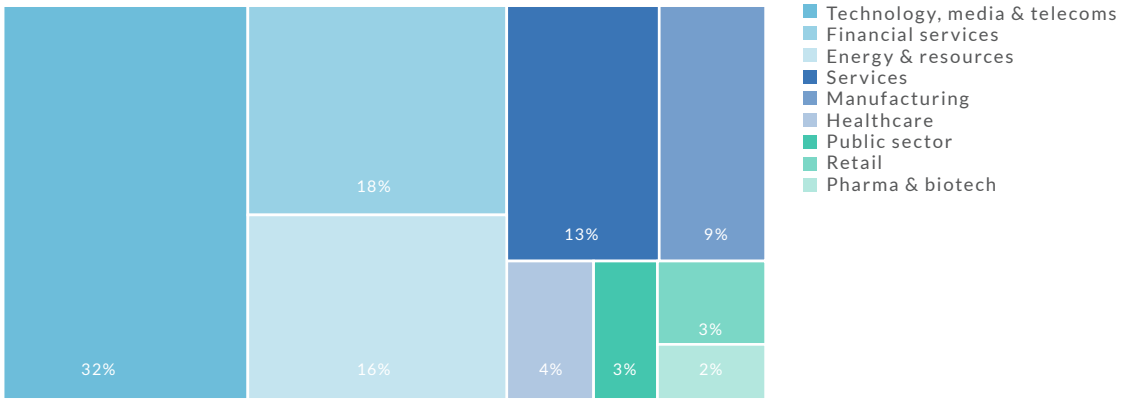
Client perspective

We carry out a client survey to help us build a rich picture of how different trends in the South America are affecting clients' organisations and their use of consulting. One survey focuses on trends in South America, providing detailed insights into the nuances of the market. For this, we surveyed 100 senior clients of consulting firms from across the South America, all of whom work in organisations with more than 500 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 33

Respondents by sector



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Figure 34

Respondents by organisation size

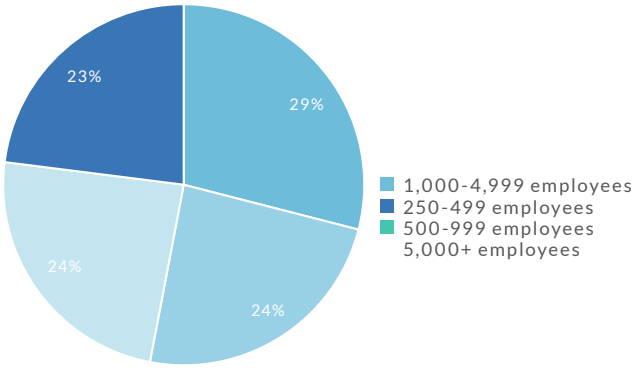
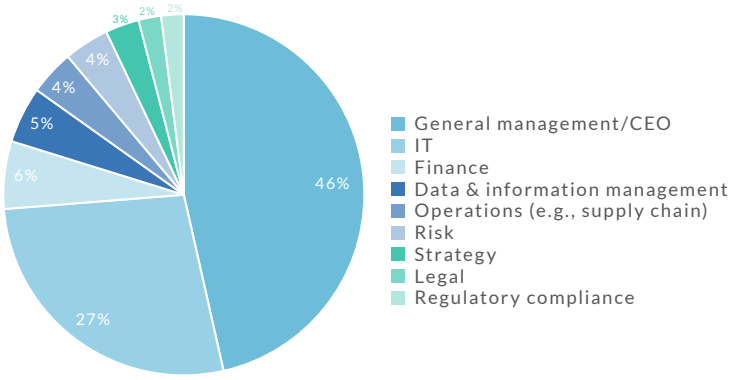


Figure 35

Respondents by function



Interviews with senior consultants

In addition to our quantitative research, we interviewed eight very senior consultants in South America, 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 in to 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 South America 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".

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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.

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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.

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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).

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Ashok is a writer and editor at Source in our Market Trends team. He is an experienced writer, editor, and analyst, providing insights into the latest trends and developments across the professional services market. He has been quoted by a variety of trade publications and has previous experience in Source's Client Perception Programme. Prior to joining Source, Ashok was an editor and consultant in the commodities market, as well as working in the UK automotive industry.

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Ed regularly speaks about the consulting market to leadership teams around the world, has lectured at Colombia 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.

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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	France DACH Australia Southern Europe	Nordics Energy & Resources Technology, Media & Telecoms	
	May		China Japan	Digital, Transformed?
	June			
Q3	July	China Benelux South America South East Asia India Japan Eastern Europe & Russia Africa Energy & Resources Financial Services		
	August		Perceptions of Risk Firms Perceptions of Tax Firms	Consulting's New Talent Crisis
	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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For more information about any of these, please visit our website or get in touch.