

The Benelux Consulting Market in 2021

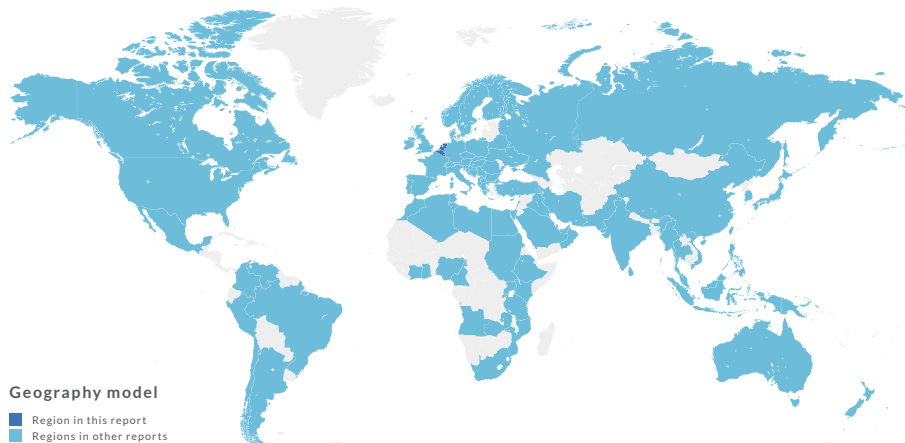
Market Trends Programme





What's included in this report

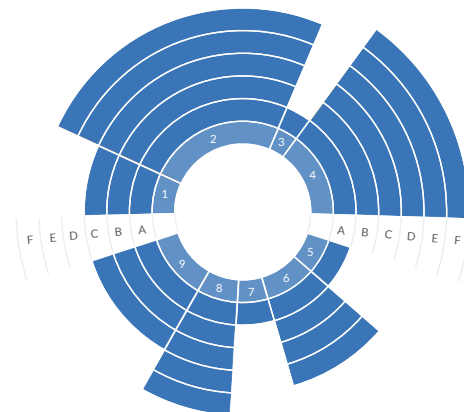
Our reports offer a wealth of market sizing, growth, and forecast data alongside engaging, in-depth analysis of the trends that matter. Using our highly flexible, multidimensional model we provide firms with robust, trusted data to make informed decisions about strategic investments and plan for the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



Geography model

■ Region in this report
■ Regions in other reports

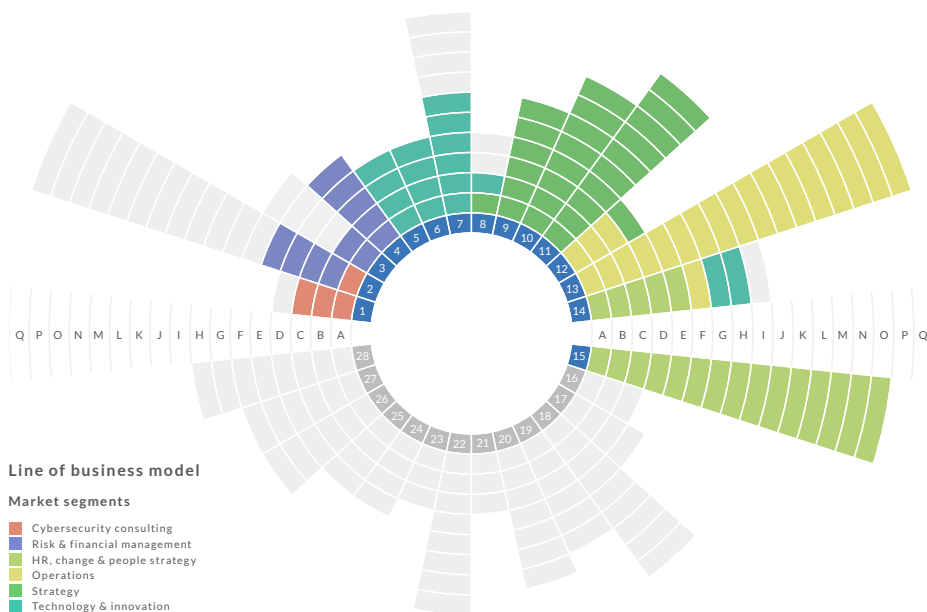
Albania	Canada	Germany	Kenya	North Macedonia	Saudi Arabia	Tanzania
Algeria	Chile	Ghana	Kuwait	Norway	Serbia	Thailand
Angola	China	Greece	Lebanon	Oman	Singapore	Tunisia
Argentina	Colombia	Hong Kong	Libya	Pakistan	Slovakia	Turkey
Australia	Côte d'Ivoire	Hungary	Luxembourg	Papua New Guinea	Slovenia	UAE
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

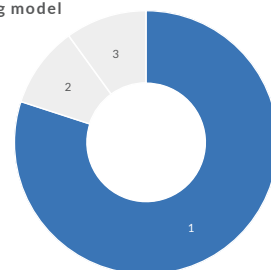
1 A Cybersecurity advice
1 B Cybersecurity incident response
1 C Penetration testing & wargaming
2 A Technology & security risk services
2 B Operational risk
2 C Programme risk
2 D Responding to regulation
2 E Risk management
3 A eDiscovery
3 B Forensic accounting
4 A Budgeting/financial planning process
4 B Debt advisory
4 C Finance function
4 D Financial 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

The revenue-earning model

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





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Market overview

Explores the key trends that were front of mind for consulting firms in this market in 2020.

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About this report

Our report draws on three main sources:

- Our Global Data Model covering the professional services market
- 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 Benelux consulting market in 2020

There were times during the early days of the pandemic, in 2020, when hopes for a mere single-digit market contraction for the year would have seemed impossibly optimistic, such as the anxiety about COVID-19's potential for economic havoc.

There were times during the early days of the pandemic, in 2020, when hopes for a mere single-digit market contraction for the year would have seemed impossibly optimistic, such as the anxiety about COVID-19's potential for economic havoc. But by the end of the year, with client demand resurgent, many consulting firms were probably disappointed to learn that the market had contracted at all.

In the event, the market ended up closing out the year having lost 3.4% of its value, which compares favourably with the slightly deeper contractions felt across both the global market as a whole and in some neighbouring markets, such as the UK (-5.5%) and France (-3.6%). As ever, averages can be a misleading representation of the experience of any individual firm: For some, 2020 was a year of growth, while for others, the damage wreaked by the crisis was much worse than the average.

Where there was growth, and frankly even where there wasn't, it had a distinctly digital feel to it. Pressed up against the hard realities of having remote employees, customers, patients, and citizens, any organisation that had been a digital laggard going into the crisis was served notice by the crisis that it was time to catch up. Meanwhile, those who had led before simply pressed harder on the digital accelerator in an attempt to pull even further clear of their competitors.

As 2020 wore on, the background driver for that new wave of digitisation started to shift subtly from cost-cutting to growth, and demand continued in that vein into 2021. Many consultants are telling us that growth is now the main topic of conversation among their clients, even to the detriment of other hot topics like sustainability. In many parts of the world, speaking to consultants gives you a strong sense that recovery has a distinctly green tinge to it, but while there are those in the Benelux region who agree with that analysis, the mood here feels somewhat different: The challenge is about making sure businesses are ready to grow in a changed world. If they can do so sustainably, then so much the better, but it's growth that, apparently, matters most.

From a geographical perspective, the experience of 2020 was relatively consistent. The Dutch consulting market, by far the region's largest, performed best, contracting just 2.8%. That owed much to the all-important financial services consulting market faring slightly better here than it did elsewhere, fuelled, to some extent, by the influx of UK companies into the Netherlands in the wake of Brexit. Although



most firms report that the immediate work connected with this influx has subsided, its legacy is almost certainly still a part of the picture. The Netherlands also benefitted from a particularly buoyant market in the TMT and pharma sectors compared with its neighbours.



— 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 Benelux'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.



Marc Burger, Vice President and Global Account Executive, Wipro Consulting Services

How did the Benelux consulting market perform in 2020?

March was a period of shock, but it was followed by a quick recovery, especially for those firms that already had an in-depth tech capability. This helped them with the immediate need to work from home but also with the boom in cybersecurity and connectivity demand. COVID has been the biggest driver of new technology uptake of last three decades, because it forced clients to organise remotely. Traditional firms that struggled to link their offering to digital transformation—say, those that work in M&A—had a difficult time finding market opportunities. In the first few months of the pandemic, we found work with new digital proposition but also in new topics, e.g. crisis management and supply chain recovery. Some propositions aimed at helping clients ramp up were put on the shelf as it became clear that the economy would take longer to recover than initially expected. Those have been brought back out now, over a year later, as they've become relevant once again.

How did the pandemic's impact differ according to sector?

There were big differences. A lot of shifts occurred in the market, as some industries were in a good position to take advantage of the situation while others had a really difficult time adapting. Travel, transport, and hospitality almost came to a standstill, and automotive lagged behind somewhat. Retail initially had a big blow but really lifted up after a few months—especially supermarkets and wholesalers. Construction was actually booming, because people who didn't go on holiday decided to invest in renovations instead in combination with a scarcity of houses. Energy & utilities clients suffered a real blow, especially oil & gas. Financial services initiatives continued throughout the pandemic, apart from those in the investment industry because there was less appetite for risk.

Thinking of digitisation, were clients coming to you with a clear idea of what they wanted to do, or were they looking to you to guide the agenda?

It was more the latter. They knew they had to do something but weren't able to see the full implications of the ask. For example, they knew they needed to increase connectivity but weren't always sure what that actually entails from beginning to end and what it means e.g., regarding security; digital capability of their

people; driving sales with your customers in a pure digital way. That was, of course, a golden opportunity for us to guide clients through the storm.

Have you seen a shift in the client mindset with regard to the people side of digital transformation?

I have. Clients are increasingly interested in multiple aspects of the people side of digital. Efforts were made to increase digital learning and awareness because, with the shift to remote working, suddenly everyone in the organisation was part of the transformation. At the most basic level, it was all about getting acquainted with MS Teams/Zoom or other digital tools for remote work. At a higher level, clients were focused on building a digital culture, which meant assessing what could be done better with the new tools and what has become more difficult. For example, Teams is great for communications efficiency but not the best for enhancing creativity, innovation and creating buy in key decisions. That became big questions. As the world begins to reopen, it's clear that most people want to find a hybrid way of working that includes both office and remote settings, and that has big implications for internal culture. It's clear that, from customers to employees, people-focused concerns are going to be a big factor in shaping the digital transformation going forward.

What kind of tools and measures were you able to employ within your own firm to address the challenges of remote working?

New joiners were given special attention, because pulling them in and making them part of the culture was key. Also, we found that those who were not accustomed to working from home frequently struggled with their mental wellbeing, so we trained and encouraged managers to virtually walk the rounds and proactively reach out to their people in a very deliberate way, because those stress signals are not picked up as easily when we're not physically working together. We built in virtual coffees and check-in conversations as well as brainstorming sessions to keep everyone in touch, and we organised random coffee sessions where people were anonymously matched, giving everyone a chance to meet people they otherwise wouldn't from all levels of the firm. We had to find new ways of ensuring that people were visible to our senior leaders—especially young people with ambitions and



creative ideas to share. Finally, we offered reverse coaching on things like how clients are reacting to the pandemic so our senior leaders could understand what was happening on the ground despite working remotely.

Did you find that developing new clients and new work was more challenging in a remote environment?

We did find that a challenge, but we also found that clients were keen to look beyond the usual suspects to find new angles, so they were more open to hearing us. We had regular short sessions with prospective clients so that we could discuss our approach to dealing with various challenges, such the COVID crisis. In that sense, we weren't focused on selling so much as starting to build new relationships. Especially in these times, firms have to not only work to increase their visibility but also be prepared to give way more away than they normally would. We can then build on those peer-to-peer knowledge-sharing conversations to create new opportunities. Our existing clients and partners also helped to connect us with new opportunities. For example, the IT and HR domains in Netherlands have quite strong communities, and these were leveraged to pass on references and build networks.

What are the big drivers in consulting in 2021?

Cost optimisation is still very important as clients are looking to become more lean and more flexible. Preparing for growth is a second important driver, because clients are looking at how they can quickly scale up. Thirdly, while many organisations have been eagerly pursuing innovation initiatives, they have not always been successful, and this has been costly. Therefore, focussed innovation has become an important driver of consulting work, with a real emphasis on proof-of-concept and real, tangible value creation.

Have you seen a renewed focus on sustainability and the environment as clients start to bounce back?

We see a lot of investment in this area, but it's not one of the bigger topics yet. There are initiatives to make sustainability part of clients' brand experience and story to attract both new talent and new clients, but generating business value remains top of mind, because clients don't want to miss the opportunity to capture the full post-crisis growth potential.



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 euros. 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



Interviews with senior consultants

In addition to our quantitative research, we interviewed 10 very senior consultants in Benelux, 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 Benelux 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
Guill Van Den Boom	Netherlands Managing Partner, COO Consulting Western Europe	EY
Marc Burger	Vice President and Global Account Executive	Wipro Consulting Services
Hans Candries	Managing Partner Advisory Services Belgium	PwC
Jeroen van Duijvenbode	Managing Director, Advisory, The Netherlands	Korn Ferry
Edwin Herrie	Partner, Head of Advisory Netherlands	KPMG
Jacques Pijl	Director	Turner
Zenzi Pluut	Partner	Twynstra Gudde
Wendy van Tol	Partner	PwC
Jessika Van Veen	Managing Director	Alvarez & Marsal
Robert Jan Van Vliet	Partner, Energy & Utilities	Sia Partners



About the author

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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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.

White Space

A powerful research tool that allows subscribers to keep up to date with the latest content being produced and maximise their return on investment. A series of reports that analyse the quality and effectiveness of thought leadership are published throughout the year.

About us

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.

Our analysis and recommendations are derived from data and experience, and we use our team's extensive knowledge of the industry to provide actionable and clear conclusions on the best course of action for you and your firm. Our insights have underpinned some of the biggest strategic investment decisions made by professional services firms around the world.

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Our custom work

In addition to our report programmes, we also provide custom advice and research-led consulting services to the world's biggest and most successful professional services firms, helping them identify the best areas for investment and plan their strategic responses.

Among other things, our work includes:

- Deep market and competitor analysis
- Acquisition strategy
- Proposition strategy and development
- Brand and client sentiment analysis
- Thought leadership and content strategy, development, and review

For more information about any of these, please visit our website or get in touch.