

EXTRACT



Market Trends

MARKET

**The DACH Consulting
Market in 2024**

Report

May 2024

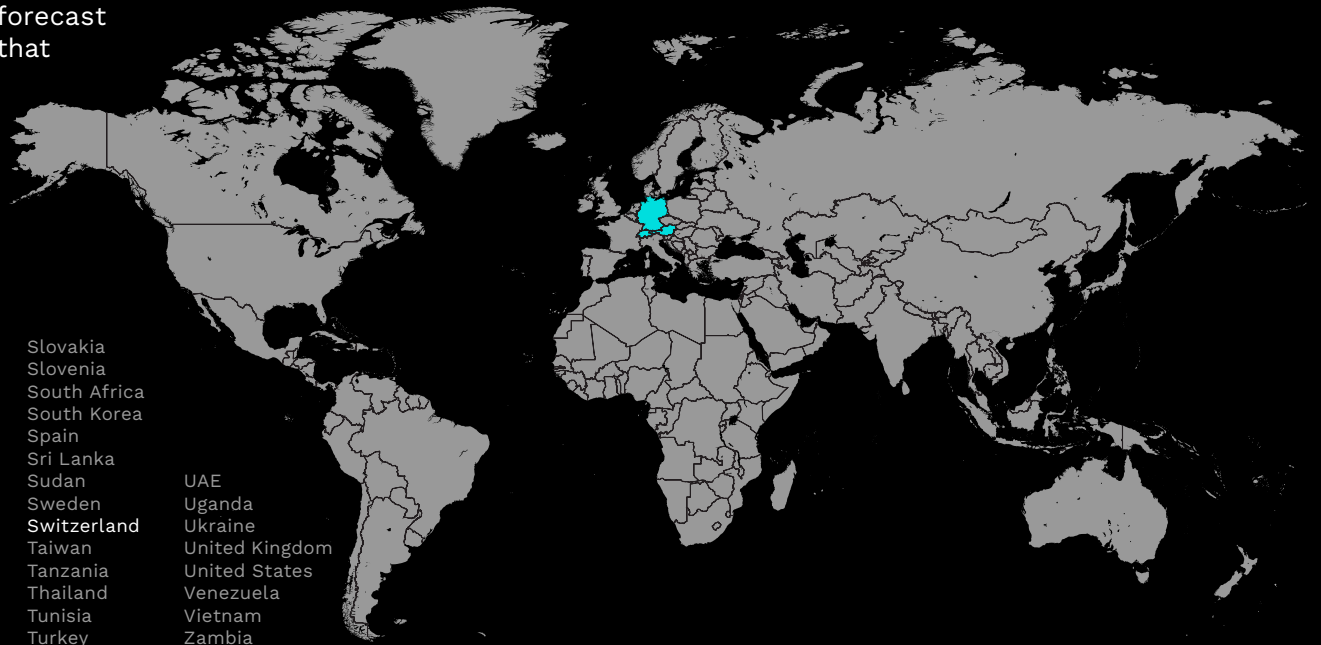
What's included in this report

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

Countries covered

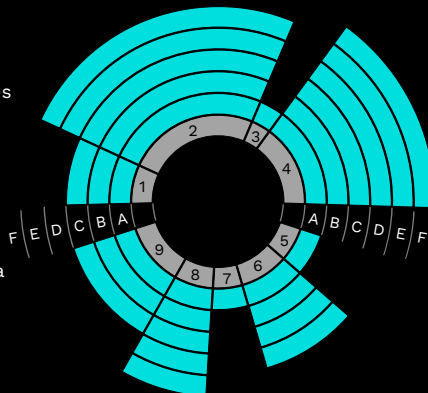
Albania	Chile	Greece	Libya	Pakistan	Slovakia
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia
Angola	Colombia	Hungary	Malaysia	Peru	South Africa
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea
Australia	Croatia	Indonesia	Morocco	Poland	Spain
Austria	Cyprus	Iran	Mozambique	Portugal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



Sector model

Sectors

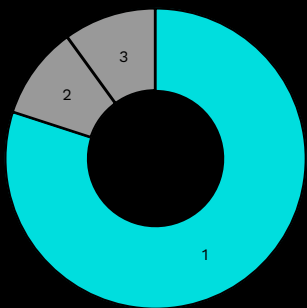
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & biotech
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



Sub-sectors

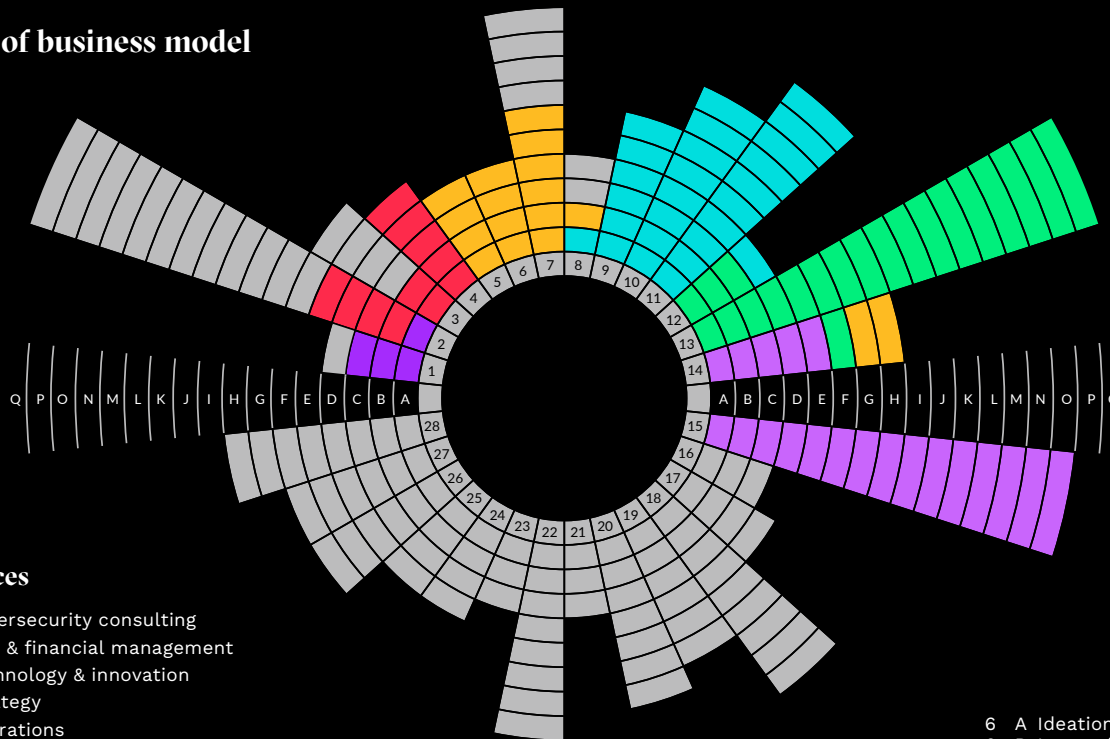
- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 1 A Energy | 4 A Aerospace | 8 A Business services |
| 1 B Primary resources | 4 B Automotive | 8 B Leisure |
| 1 C Utilities | 4 C Construction | 8 C Logistics |
| 2 A Banking | 4 D Consumer electronics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

The revenue-earning model



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

Line of business model



Services

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

Line of business

- | | |
|---------------------------------|------------------------------|
| 1 Cybersecurity | 20 Legal |
| 2 Risk | 21 Litigation |
| 3 Forensic | 22 Marketing & creative |
| 4 Financial management | 23 Network engineering |
| 5 Design & UX | 24 Product engineering & R&D |
| 6 Innovation | 25 Recruitment |
| 7 Technology | 26 Software engineering |
| 8 Data & analytics | 27 System integration |
| 9 Research | 28 Tax |
| 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 | |

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 investment |
| 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 |

Contents

Underpinned by our MegaModel, our reports deliver an independent and objective understanding of the markets that matter most; including everything from key trends and growth opportunities to the latest views of consulting leaders and a detailed analysis of the buyer's voice.

1

What really matters

We identify the things that really matter to firms—a snapshot of the most important dynamics in the market.

The big answers

We ask Source's experts what they think are the big opportunities and risks in today's market.

>> Pages 5-10



2

Market overview

Bringing together our market data, forecasts, and analysis, we provide a comprehensive picture of the state of play from a geographical, sector, and line-of-business perspective.

>> Pages 11-18



3

Client priorities

Using data from our survey of senior buyers of consulting, we explore the most important priorities, opportunities, and challenges for clients.

>> Pages 19-30

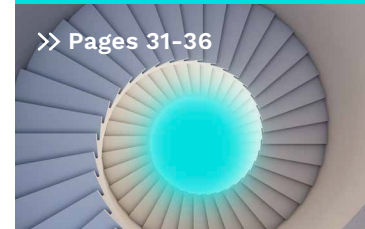


4

Implications for firms

We take a look at the factors influencing clients' buying behaviours, and what this means for the services firms provide.

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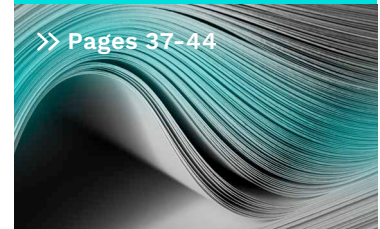


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Insights from consultants

In this series of interviews, senior leaders from professional services firms offer their perspectives on what really matters in the market today.

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1



“In addition to technical integration, change management components including talent upskilling are key in order to fully leverage the transformative power of GenAI.”

Volker Darius, Capgemini Invent

What really matters

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3

Clients are **pushing back on prices**, and firms will need to demonstrate value and rely on their account managers to win projects.



Firms with strong client relationships will be in the best position to win or retain these projects

Firms should be prepared for a more difficult environment when selling to clients. The majority of clients we surveyed in the DACH market said that they expect prices to decrease, a significantly larger proportion than in 2023. Clients believe that the work that they need done is increasingly commoditised, and more firms can do the work, leading to an unfavourable demand-supply ratio for firms. Whether the work is not as complex, not as personalised, or simply more repeatable, clients feel that there is little differentiation among firms and so are not as willing to pay a premium. This puts clients in a stronger negotiating position and firms can no longer dictate the prices they wish.

As the services offered by competing firms are likely to be very similar, the main deciding factor will come down to account management, and firms with strong client relationships will be in the best position to win or retain these projects. Clients want to work with people that they know and trust, so although firms may have to lower their rates somewhat, they should be able to continue to win projects.

2



“The German consulting sector is currently facing a tough period due to the overall economic climate, which includes rising energy expenses, economic contraction, and sluggish GDP expansion.”

Michael Zapf, EY

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3



“AI is centre stage. I think most questions are around how it can improve efficiency and performance, and which AI algorithm can improve this.”

Torsten Henzelmann, Roland Berger

Client priorities

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Clients may be overlooking the necessary data foundations that digital technology is built on

The main drivers for this increased investment in digital technology are improving decision making, managing risk, and cutting costs, all of which are likely to use improved data capabilities. However, when asked about which areas might be the most impacted by digital technology, providing easier access to more, better data was the least selected answer. One interpretation of this could be that clients may not be seeing the full importance of data because it is so ingrained in all areas of the business. It could also suggest that clients are focused on the eventual outcomes, rather than what will be required to get there, and that they are perhaps seeing data improvement as more of a manual process.

There is also significant variation by seniority. The main benefit of digital technology for heads of departments is an improved customer experience, where for direct reports to CxOs, this is improved internal communication and collaboration. CxOs, however, see managing risk and improved decision making as the main benefits. Digital technology upgrades will present a large opportunity, but firms may want to adjust the benefits they highlight depending on who they're talking to.

However, some of the human elements of a company will still remain best served by people, and clients believe improving employee experience, decision making, and responding to regulatory change are some such areas.

Where clients are relatively in agreement is in the belief that people are generally going to be more expensive than technology solutions, as cutting or optimising costs was the least selected answer.

Figure 17

In which two areas do you think better use of digital technology would have the biggest positive impact in your organisation?

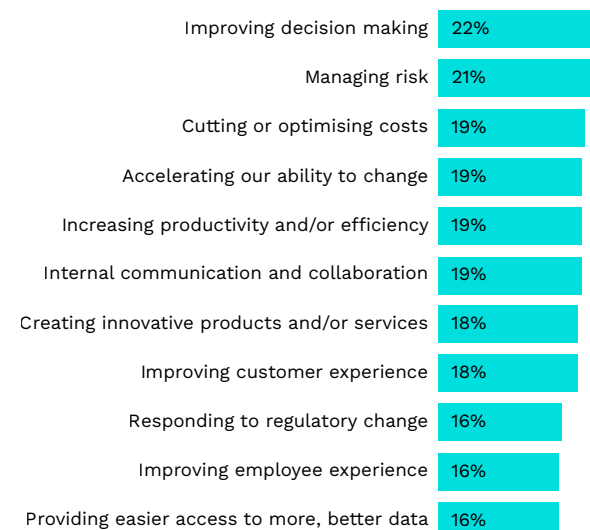


Figure 18

Where in your business will investment in people make more of a difference than investment in technology?



New regulations are forcing clients to invest in ESG, but clients are focusing on the cheapest aspects first

The EU's CSRD (Corporate Sustainability Reporting Directive) has come into force for 2024, which has forced clients to address the new regulations. This has had both positive and negative effects on clients' businesses.

On the one hand, the new regulations have arrived alongside several government incentives, which have enabled clients to take advantage of new subsidy schemes (69%). The regulations have also forced clients to kickstart their transition into long-term sustainability, through both embedding sustainability into all areas of business (48%) and through giving clients an impetus to meet their goals (41%).

On the other hand, for some clients the regulations have been quite disruptive. Clients have been forced to rethink their strategies (64%) and find funds during a financially challenging year (53%). In some cases, the new regulations have forced clients to halt investments in other areas of the business to prioritise addressing the ESG regulations (44%).



69%

of clients have been able to take advantage of new subsidy schemes



64%

of clients have been forced to rethink their strategies

Figure 19

How have you been positively affected by the CSRD and other legislation brought in to deal with the above changes?

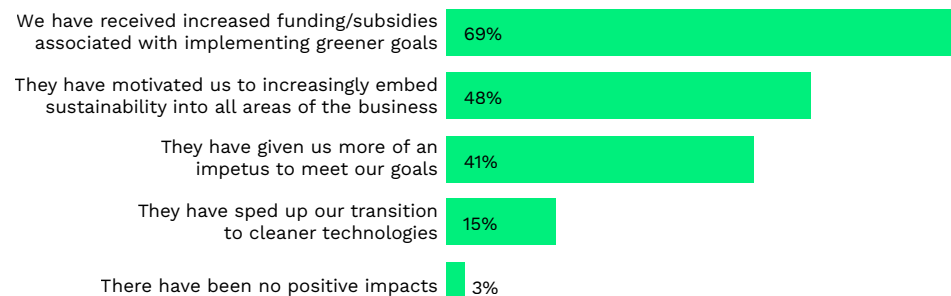


Figure 20

What have been the negative impacts of the legislation brought in to combat these changes?



4

“There’s ongoing demand for ESG services, while AI projects are experiencing exponential growth.”

Alexander Lippner, KPMG Austria

Implications for firms

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Clients are more realistic about tech upgrade timelines, but are also aware of systems being discontinued

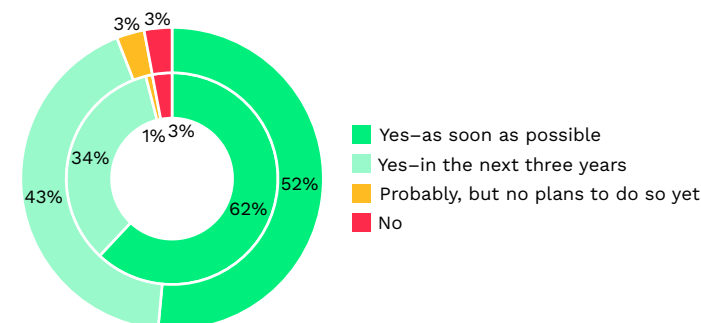
The urgency around technology updates has somewhat relaxed: This year, 52% of clients say they need to update their tech as soon as possible, 10 percentage points lower than last year. Clients now recognise that these processes can take a long time, and have a more realistic view, with 43% of clients saying that their technology needs to be updated in the next three years.

Several factors could be at play here. Clients leading in this space have likely just completed their technology update projects and hence are less concerned with falling behind their competitors. The hype that AI generated in early 2023 ultimately did not fulfil clients' imagination, giving them a bit more time to evaluate what it would be most useful for.

However, the pace at which technology evolves has historically only accelerated and will likely continue to do so. Furthermore, cloud infrastructures and software solutions are also evolving, and legacy systems are slowly being phased out by the big tech providers. In some cases, clients have been forced to upgrade for the sake of cybersecurity. SAP's business suite, for example, will only continue to be supported for free until 2027.

Figure 27

In your opinion, does your organisation need to update its technology within the next three years to survive? Inner circle 2023, outer circle 2024



5



Insights from consultants

“Clients are looking for the breakthrough invention to make things faster and better across every dimension: compliance and risk management, strategy, technology, training and development, etc.”

Ulf Glöckner, Sopra Steria

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6

“Clients are looking for consultants who not only understand the nuances of their industries but can also offer bespoke solutions tailored to their specific challenges and opportunities.”

Christoph Treichler, Cardea

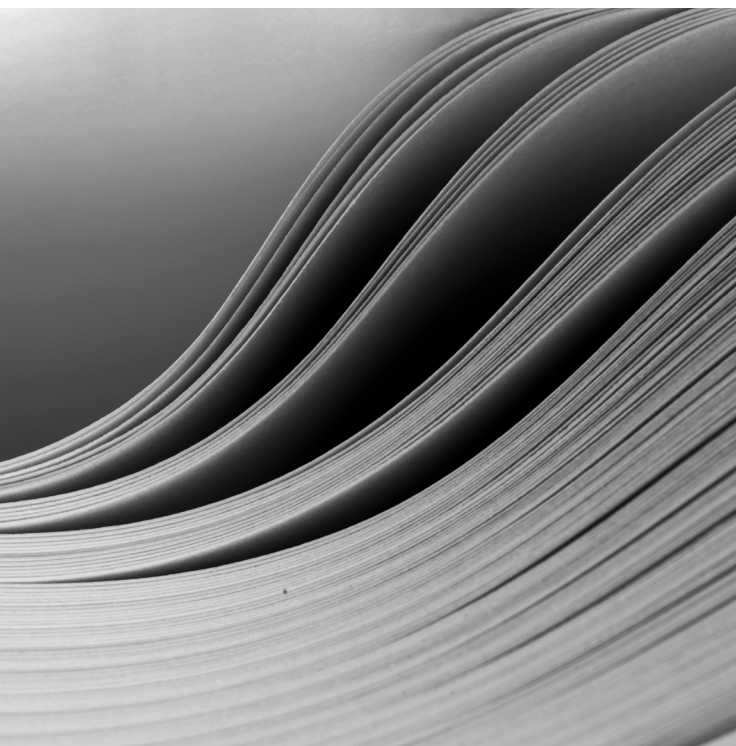
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Our approach to gathering data

The market for professional services is vast and highly dynamic, with deep roots spread out across the business world. The Source MegaModel helps you get to grips with the facts.

The MegaModel is the largest and most comprehensive database of its kind, anywhere in the world. It's used by the world's leading firms to identify where growth is coming from, which markets to invest in, and which sectors are driving demand.



Methodology—The MegaModel

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 service.

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.

US dollar to British pound US\$1 = £0.80

US dollar to euro US\$1 = €0.92

The data in this report is rounded to the nearest whole number or stated decimal place. As a result, totals may display small discrepancies.

Who did we speak to

Client perspective

We carry out a client survey to help us build a rich picture of how different trends in DACH are affecting clients' organisations and their use of consulting. Our survey focuses on trends in DACH, providing detailed insights into the nuances of the market. For this, we surveyed 200 senior clients of consulting firms from across DACH, 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 2024 and the first half of 2025
- 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.

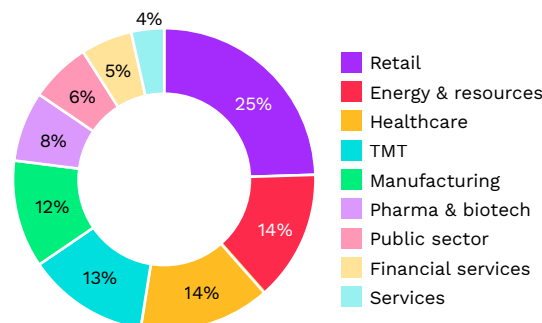
Insights from consultants

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.

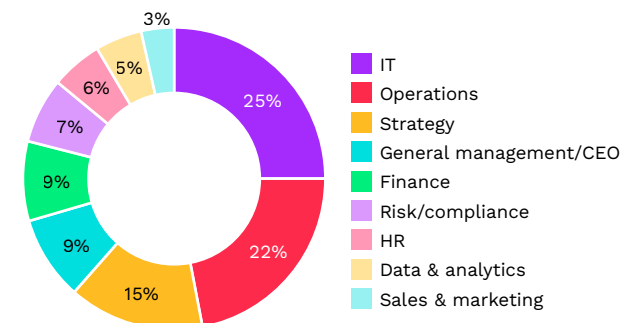
In-depth desk research

We also conducted a thorough PEST analysis in DACH 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.

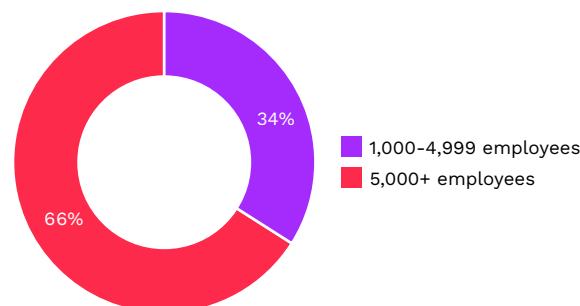
Respondents by sector



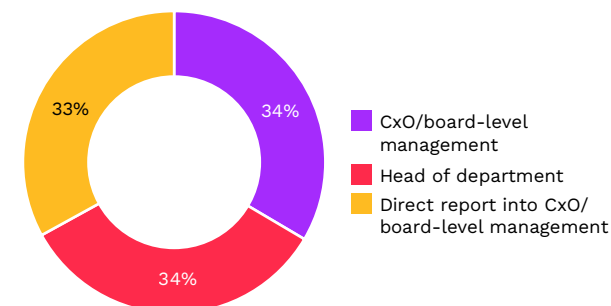
Respondents by function



Respondents by organisation size



Respondents by seniority



Definitions of sectors and services

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.

Services

We've taken the lines of business and capabilities from our taxonomy that broadly align with traditional definitions of consulting and divided them into services 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.

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.

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.

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.

Meet the expert

Tony Maroulis

Tony is a Principal Consultant in the Market Trends team. He joined Source in September 2022 and works on a range of regular and custom reports. Prior to joining Source, Tony spent a decade as an industry analyst at Ampere Analysis, leading a team of 15 analysts to market size the TMT sector. This included maintaining syndicated products, leading and delivering custom projects, speaking to journalists, and presenting at industry events.

Tony Maroulis

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About us

We help professional services firms understand what really matters when facing decisions of vital importance.

The best decisions are based on evidence, objectivity, and a willingness to change. That's why, at Source, we tell you what you need to hear, rather than what you want to hear.

We draw upon our deep roots within the professional services sector to provide firms with a clear picture of their clients' worlds. Through comprehensive research and meticulous analysis, we pinpoint what truly matters and deliver actionable insights that help firms map out the right way forward.

We believe in thriving individually and succeeding together. And we would love to help your firm crack its latest conundrum.

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