

EXTRACT



Market Trends

MARKET

**The Sustainability Consulting
Market in 2024**

Report

Aug 2024

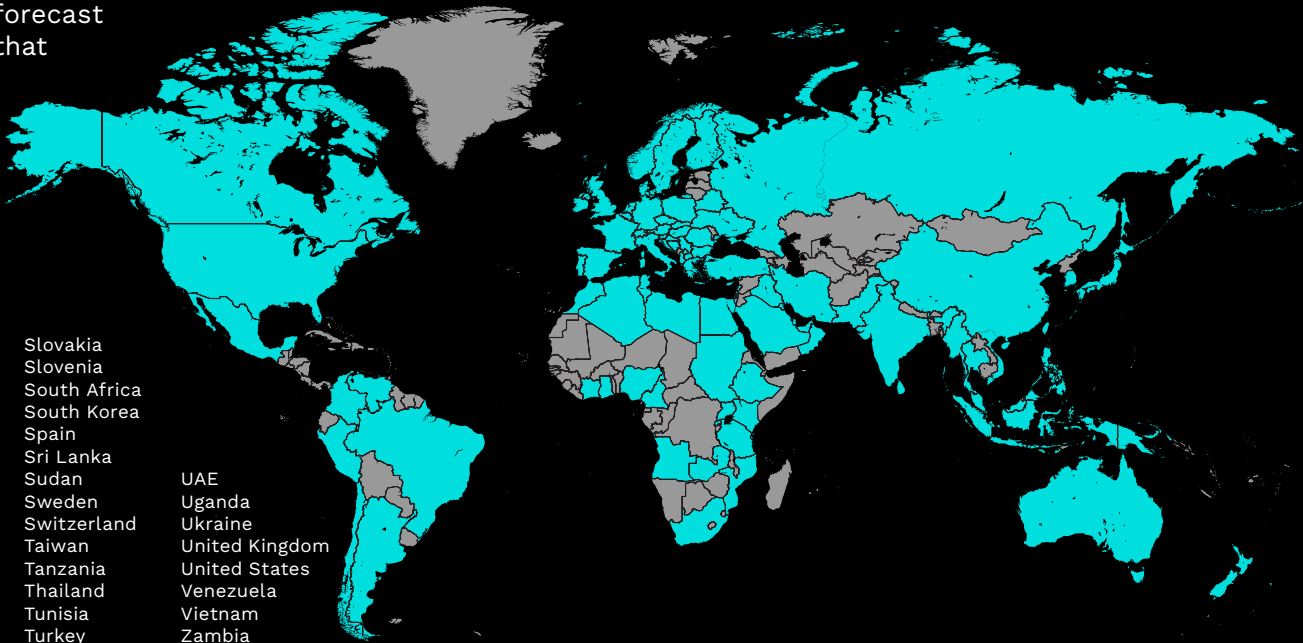
What's included in this report

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

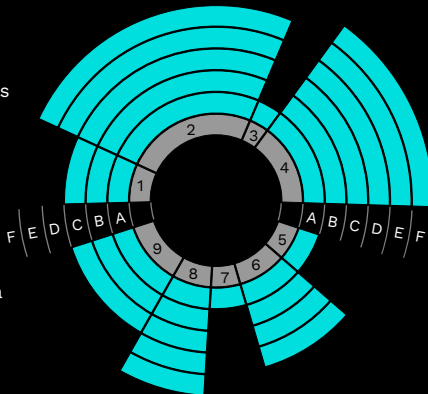
Albania	Chile	Greece	Libya	Pakistan	Slovakia
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia
Angola	Colombia	Hungary	Malaysia	Peru	South Africa
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea
Australia	Croatia	Indonesia	Morocco	Poland	Spain
Austria	Cyprus	Iran	Mozambique	Portugal	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

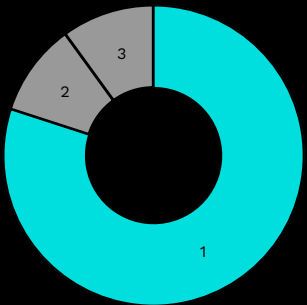
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & life sciences
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



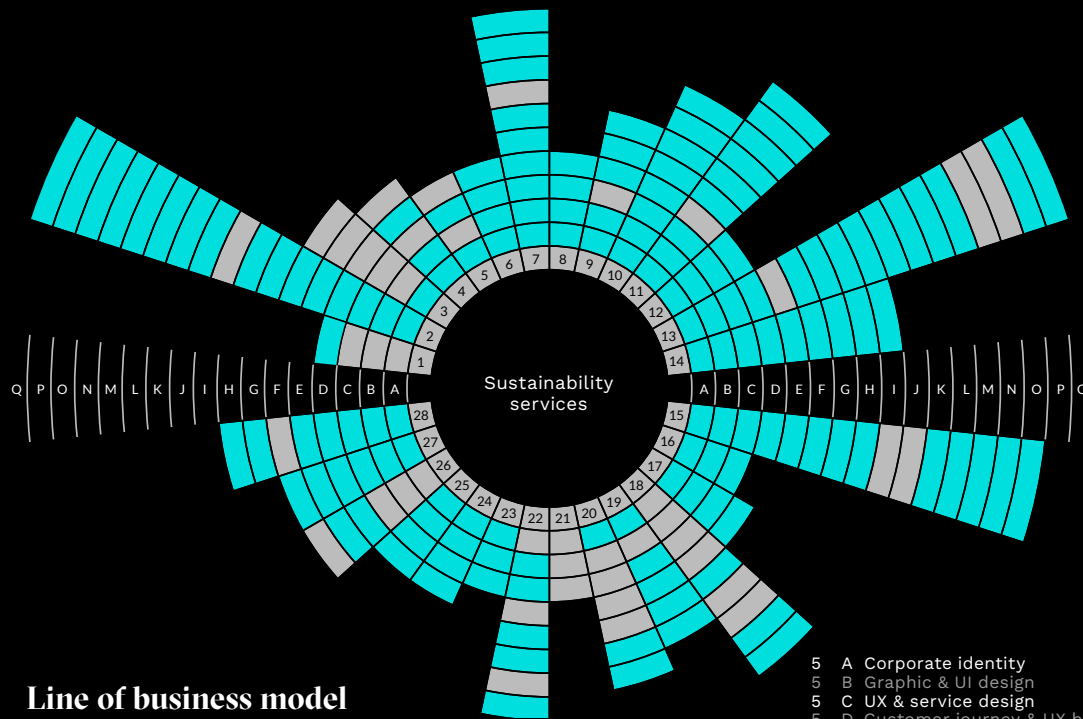
Sub-sectors

- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 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

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 implementation
- 1 C Cybersecurity incident response
- 1 D Penetration testing & wargaming
- 2 A Risk governance
- 2 B Actuarial
- 2 C Compliance risk
- 2 D Crisis & reputation management
- 2 E Environmental risk
- 2 F Financial assurance
- 2 G Internal audit
- 2 H Operational risk
- 2 I Physical security solutions
- 2 J Physical security strategy
- 2 K Programme risk
- 2 L Responding to regulation
- 2 M Risk management
- 2 N Technology & security risk services
- 2 O Third-party assurance
- 2 P Transactions-related risk
- 2 Q Treasury risk
- 3 A Anti-corruption services
- 3 B eDiscovery
- 3 C Forensic accounting
- 3 D Forensic technology solutions
- 3 E Fraud mitigation
- 3 F Investigation services
- 4 A Budgeting/financial planning process
- 4 B Debt advisory
- 4 C Finance function
- 4 D Financial advisory
- 4 E Financial restructuring & insolvency

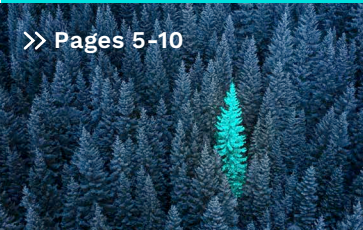


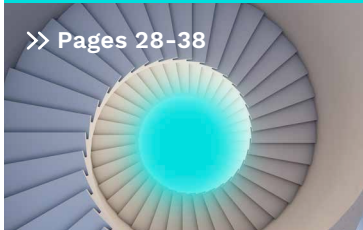

- 5 A Corporate identity
- 5 B Graphic & UI design
- 5 C UX & service design
- 5 D Customer journey & UX benchmarking
- 6 A Ideation
- 6 B Innovation management
- 6 C Innovation strategy
- 6 D Strategies for growth from innovation
- 7 A AI advice & implementation
- 7 B Cloud advice
- 7 C Cloud implementation
- 7 D ERP consulting
- 7 E Geospatial advice & implementation
- 7 F IT strategy, planning & review
- 7 G IT training
- 7 H Programme management
- 7 I Robotics advice & implementation
- 7 J Vendor selection
- 8 A Advanced analytics
- 8 B Data visualisation, business intelligence & semantic layer
- 8 C Data warehousing & database management
- 8 D Machine learning
- 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 Clean technology
- 14 B Green IT
- 14 C Purpose-led strategy & change
- 14 D Resource-efficiency implementation
- 14 E Resource-efficiency strategy
- 14 F Social impact & trust
- 14 G Sustainable investment
- 14 H Sustainable supply chain
- 14 I Sustainable workforce
- 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
- 16 A Exterior building design
- 16 B Interior building design
- 16 C Landscape design
- 17 A Accounting operations assurance
- 17 B Accounting systems assurance
- 17 C Corporate reporting
- 17 D IFRS & regulatory reporting
- 18 A Contact centre outsourcing
- 18 B Document management outsourcing

- 18 C Finance accounting outsourcing
- 18 D Human resources outsourcing
- 18 E IT outsourcing
- 18 F Other outsourcing
- 18 G Payroll outsourcing
- 18 H Regulation & remediation outsourcing
- 18 I Supply chain management & distribution outsourcing
- 19 A Building & engineering analytics
- 19 B Engineering project management
- 19 C Infrastructure design
- 19 D International development
- 19 E Transport infrastructure, planning & engineering
- 19 F Urban design & planning
- 20 A Corporate & transaction law
- 20 B Criminal law
- 20 C Digital & technology law
- 20 D Domestic & family law
- 20 E Intellectual property law
- 20 F International trade, regulatory & government law
- 20 G Labour & employment law
- 21 A Dispute advisory services
- 21 B Expert witness
- 21 C Trial services
- 22 A Brand activation
- 22 B Brand strategy
- 22 C Creative production
- 22 D Customer relationship management
- 22 E Marketing & communication production
- 22 F Marketing & communication strategy
- 22 G Marketing mix optimisation
- 22 H Public relations & affairs
- 23 A Network installation
- 23 B Network optimisation
- 23 C Network strategy & architecture
- 24 A Physical product quality assurance & testing
- 24 B Physical product R&D
- 24 C Product & industrial design
- 24 D Technical feasibility assessment, prototyping & mock-ups
- 25 A Contract staffing supply
- 25 B Executive interim
- 25 C Executive search
- 25 D Talent sourcing
- 26 A Application development
- 26 B Digital product quality assurance & testing
- 26 C Digital product R&D
- 26 D IoT and connected devices
- 26 E Solution architecture
- 26 F Virtual, augmented, and mixed reality
- 27 A Functional & industry application integration
- 27 B Microsoft
- 27 C Oracle
- 27 D Salesforce
- 27 E SAP
- 27 F Workday
- 28 A Corporate tax
- 28 B Global employer/mobility services
- 28 C Indirect tax
- 28 D International tax
- 28 E Private wealth tax
- 28 F Tax dispute resolution & controversy
- 28 G Transaction tax
- 28 H Transfer pricing

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	2	3	4	5
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.	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.	Client priorities Using data from our survey of senior buyers of consulting, we explore the most important priorities, opportunities, and challenges for clients.	Implications for firms We take a look at the factors influencing clients’ buying behaviours, and what this means for the services firms provide.	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



“Those companies that have only focused resources on compliance may find themselves lagging behind those who have thought about innovation, partnership, and human resources.”

Cédric Baecher, Wavestone

What really matters

Three things for a firm to act on6

The big answers... on the sustainability consulting market.....9

2

Once the 2024 regulations have been met, clients will be looking at the **broader strategic decisions**.



Over two thirds of clients said that they would be most likely to use strategy firms for sustainability-related issues in the next 18 months

For the first time since we began running this report in 2022, clients are considering their extensive long-term plans. They understand that once they have made a raft of changes to meet 2024 regulations, there is a need for a total refresh. A more positive economic picture and an increasingly resilient workforce are also encouraging higher levels of investment into sustainability agendas.

Realising that there is a lot to be done, clients are now looking at the major changes required to become viable, sustainable businesses in the future. This will likely result in increased demand for strategy work. This will sit alongside the implementation work that is coming in as a result of new regulations.

Clients will be introducing more sustainable products and services to their portfolios, and they will be actively investing in the development of decarbonisation and circular economy strategies.

This explosion in interest will increase the demand for sustainability skills. Firms may be unable to find the experience internally and so they will likely be leaning on their own talent ecosystems to ensure they have access to the right skillset.

2



“Sustainability consulting growth was fuelled by guiding companies through the energy transition, rapid changes in ESG reporting expectations, and the ongoing efforts to decarbonise in line with targets.”

Jaideep Das, ERM

Market overview

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North America dominates the market, but growth in the GCC far outstrips an otherwise modest global investment..... 16

Reporting accounts for a lot of the growth in 2024, but green technology is set to attract the most interest in 2026 17

The energy & resources sector, operating at the heart of the green transition, looks set to invest heavily in sustainability consulting..... 18

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“The market has tended to focus on climate reporting and now the next big thing is biodiversity. It’s the missing piece of the puzzle as we move towards Net Zero.”

Sarah Bidinger, CapCo

Client priorities

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Though confidence is improving overall, there are huge variations across regions and sectors

Client confidence is far from monolithic. Confidence, although improving overall, is still very patchy. It differs heavily by sector and region; for example, a remarkable 76% of Australia clients reported that their confidence was unaffected by recent turmoil. Strong confidence was also reported in the UK and China, where half of surveyed clients also reported that they had been largely unaffected.

This is in stark contrast to the Nordics region, where 60% of clients remain in a crisis of confidence, and the US, where only 16% of clients felt that they had been unaffected.

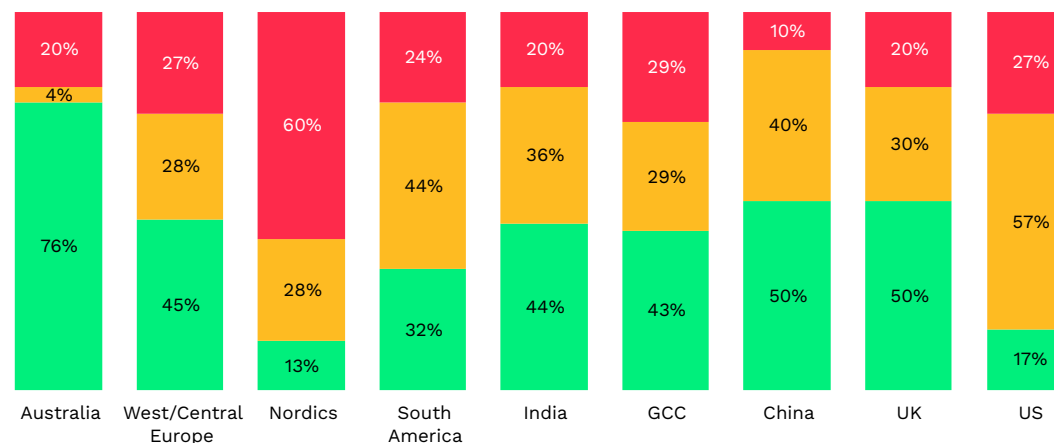
This variation can also be seen across sectors. More than 50% of clients in the manufacturing sector felt that their confidence had been unaffected, but half of energy & resources clients felt unsure about the future of their business.

Firms must be aware of this patchy growth, as even though the broad picture looks more positive, they must cater their offerings to the client at hand with these differences in mind. Clients that are more confident will be more willing to part with their money than those that feel unsure about the economic future of their organisation.

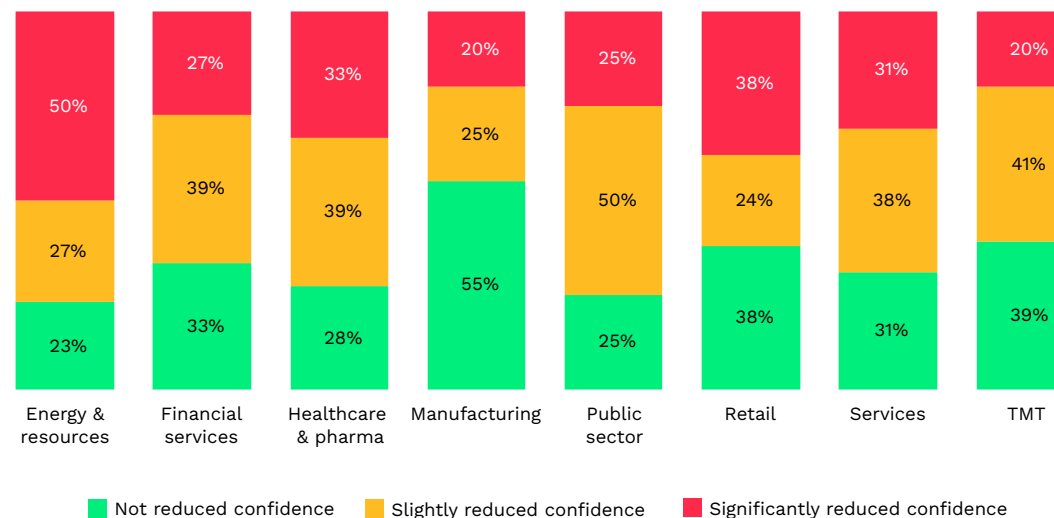
Figure 9

To what extent have macroeconomic and political tensions impacted your confidence when thinking about the future of your business?

By country



By sector



Clients are focused on developing sustainable products to secure their ESG credentials long-term

The work currently being undertaken to improve environmental performance points to a change in client thinking, as longer-term strategy is now playing more of a part in both the thinking and actions being undertaken by clients.

Though last year's focus on clean technology and carbon reduction still remains, clients are now less concerned with implementing reporting requirements. Instead, they are looking to change their operating models to develop more sustainable products and services to ensure that they are competitive in meeting future targets.

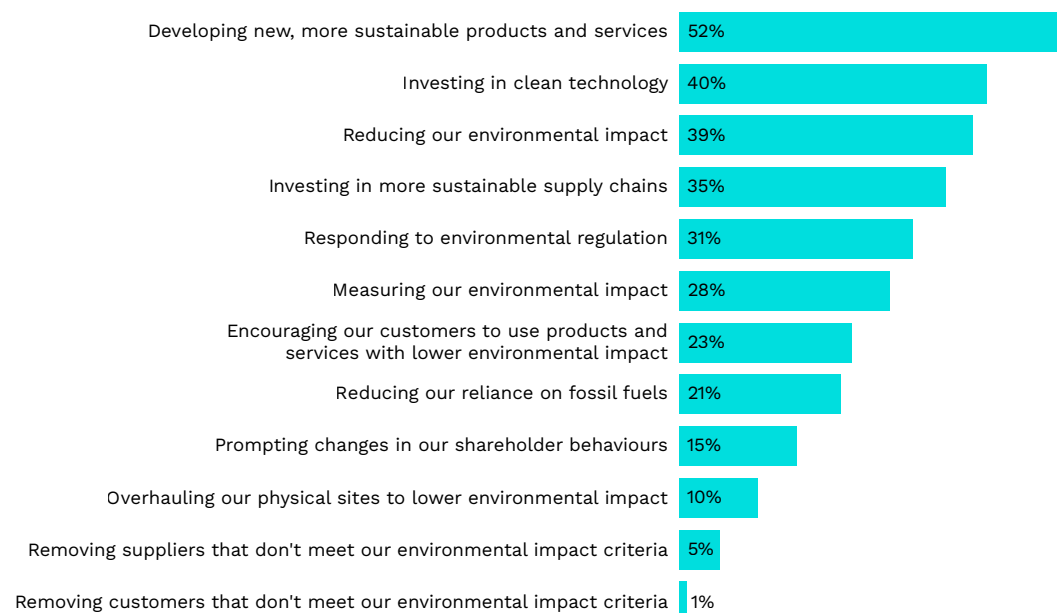
The only areas that aren't focusing on this as a priority are Australia, the US, the UK, and the GCC. Australia's primary focus is on reporting, with the measurement of their environmental impact the priority for 84% of the client base. The US and the GCC are already focusing on reducing their carbon production, while those in the UK are primarily focused on the creation of more sustainable supply chains.

However, even though there is some variation, their priorities all point to them being in a similar position. They have been measuring their services and are now looking to analyse the resulting data to see where they can realise improvements.

They will therefore be looking for consultants to help develop a strategy for more sustainable products, and, once this is planned, to help enact those changes to realise the gains for their wider goal of decarbonisation.

Figure 13

What action has your organisation undertaken regarding the environmental aspect of ESG?





**“We need to spread ESG across
all of our offerings, activities, and
consultants. So do our customers.”**

Laure Brumont, Sopra Steria

Implications for firms

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CEOs are still dictating ESG strategy, but it's increasingly shaped by consumer opinion and government regulation

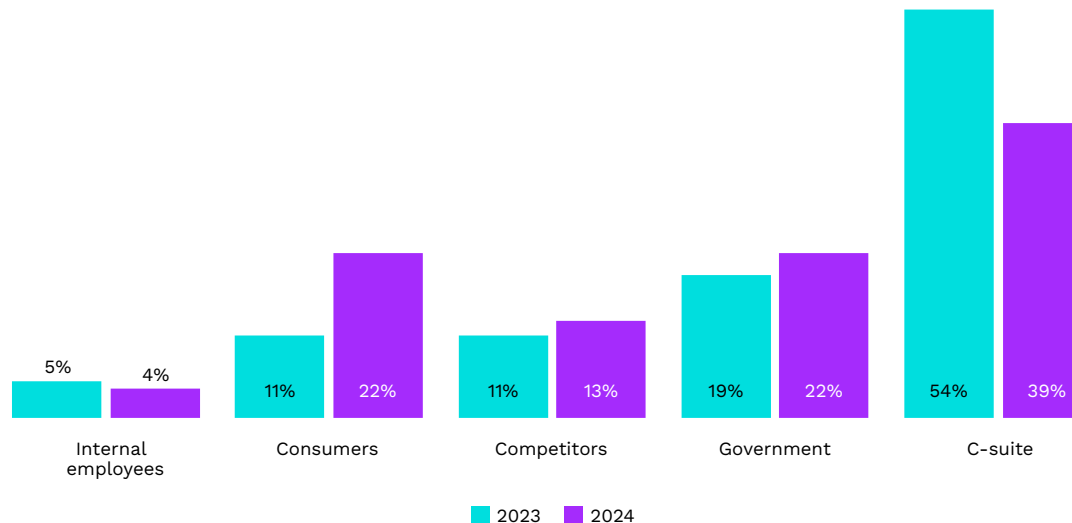
Since 2022, the C-suite has been selected as the most important party in dictating the organisation's sustainability strategy, but the extent of its influence has been declining year on year. In 2022, 75% of clients said that ESG strategy was being dictated by C-suite, dropping to 54% in 2023 and then to 39% in 2024.

Although they are still clearly steering the ship, a variety of other factors are increasingly entering into the sustainability conversation. Regulation, for example, is clearly dictating strategy, as clients themselves are acknowledging the growing role of the government in dictating ESG action. Moreover, clients are increasingly aware of the reputational benefits of sustainability work and are clearly looking more towards consumer demand as a key motivating factor in deciding their ESG strategy.

Firms need to understand this shifting landscape, as, though they must understand that business leaders still have the final say over overall strategy, they should also be looking to the growing influence of external factors. Consumer opinion and, most importantly, regulation are now pivotal in dictating how organisations feel they should be acting when it comes to sustainability.

Figure 22

Who is dictating ESG strategy in your company?



5



“We’re seeing strong growth, but it’s still only the front-runners that have started to materially decarbonise their operations. I foresee this market trebling in size.”

Will Jackson-Moore, PwC

Insights from consultants

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6

“This is about transformative change. It involves fundamentally rewiring the global financial architecture and redefining the concept of value.”

John McCalla-Leacy, KPMG

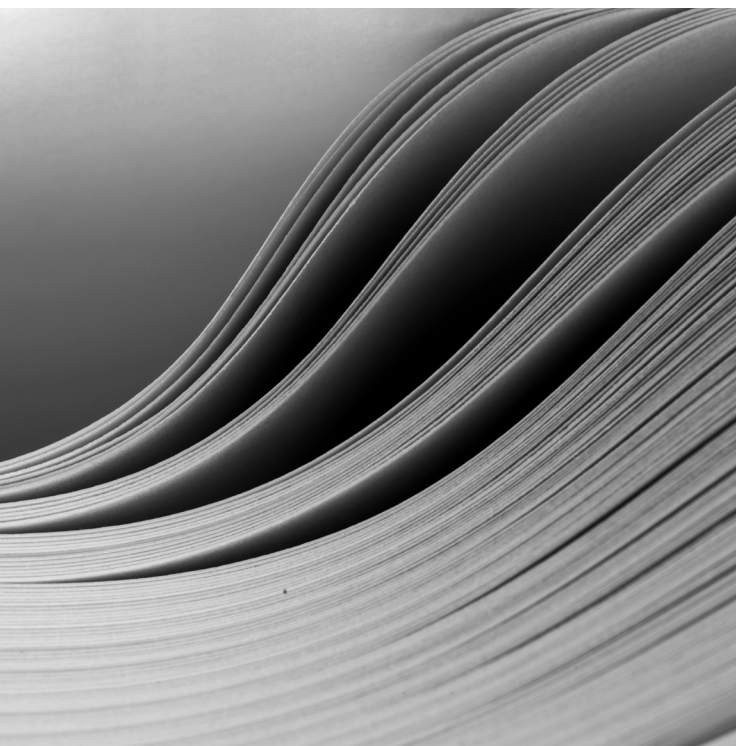
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Our approach to gathering data

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 US dollars.

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 the sustainability market are affecting clients' organisations and their use of consulting. Our survey focuses on trends in the sustainability market, providing detailed insights into the nuances of the market. For this, we surveyed 300 senior clients of consulting firms from across the sustainability market, 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.

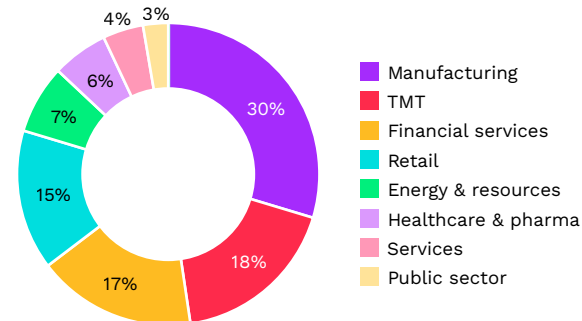
Insights from consultants

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.

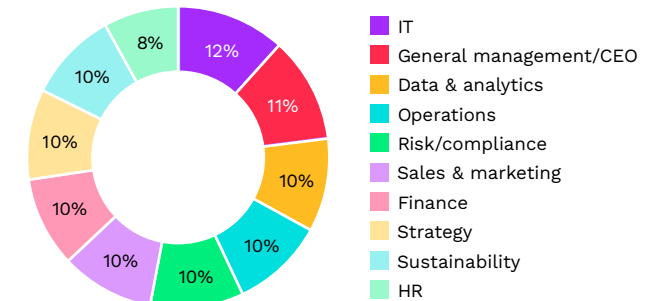
In-depth desk research

We also conducted a thorough PEST analysis in the sustainability market 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.

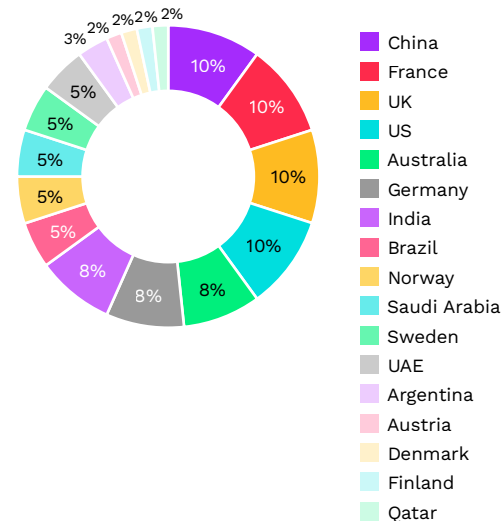
Respondents by sector



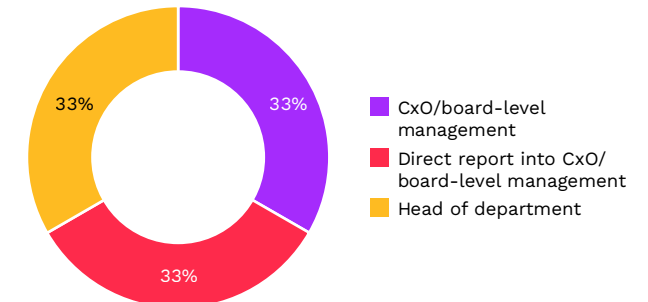
Respondents by function



Respondents by country



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 & life sciences

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 a selection of lines of business and capabilities from our taxonomy and divided them into sustainability services. For our full line of business model, please refer to the map on page 3 of this report.

We make a distinction between pure sustainability services and embedded services. Pure sustainability capabilities are shown in **bold**. For embedded services, we take only a portion of the capability, to reflect how much of this market is related to sustainability. Please note some capabilities are included in more than one service.

ESG advisory

Functional & industry application integration, Robotics advice & implementation, Programme management, AI advice & implementation, Building & engineering analytics, ERP consulting, Cloud advice, Third-party assurance, Corporate identity, Public relations & affairs, Innovation strategy, Supply chain management & distribution outsourcing, Stakeholder management, Corporate strategy, Labour & employment law, Performance management, Technology & security risk services, Public-private partnerships, Portfolio & investment strategy, Operational due diligence, Accounting systems assurance, Financial due diligence, Regulation & remediation outsourcing, Accounting operations assurance, Indirect tax, Pricing, Capital allocation strategy, Business continuity & recovery, Post-M&A integration, Business & financial modelling, Corporate restructuring, Pension fund evaluation & advice, International trade, regulatory & government law, Customer feedback, Customer segmentation, Channel management, Market analysis & strategy, Creative production, Marketing & communication production, Market research, Treasury risk, **Environmental & social impact research**.

ESG risk & reporting

Functional & industry application integration, Robotics advice & implementation, Workday, IoT and connected devices, AI advice & implementation, ERP consulting, Third-party assurance, Technology & security risk services, Operational due diligence, Treasury risk, Risk management, International tax, Transaction tax, Transfer pricing, Internal audit, Responding to regulation, Financial advisory, Transactions-related risk, Crisis & reputation management, Technology due diligence, Compliance risk, IT outsourcing, Actuarial, Operational risk, Corporate reporting, IFRS & regulatory reporting, Penetration testing & wargaming, **Environmental risk**.

Sustainable finance

Functional & industry application integration, Oracle, Salesforce, Third-party assurance, Public-private partnerships, Portfolio & investment strategy, Operational

due diligence, Accounting systems assurance, Financial due diligence, Accounting operations assurance, Pricing, Capital allocation strategy, Pension fund evaluation & advice, Risk management, International tax, Transaction tax, Transfer pricing, Internal audit, Responding to regulation, Corporate & transaction law, Corporate tax, Private wealth tax, Financial advisory, Transactions-related risk, Crisis & reputation management, Budgeting/financial planning process, Debt advisory, Governance & board effectiveness, Financial assurance, Risk governance, Physical security strategy, Global employer/mobility services, Technology due diligence, Compliance risk, M&A transaction strategy, Programme risk, Policy formulation, Commercial due diligence & valuation, Macro/microeconomic research, Anti-corruption services, Benchmarking, **Sustainable investment**.

Supply chain & operations

Functional & industry application integration, SAP, ERP consulting, Third-party assurance, Supply chain management & distribution outsourcing, Technology & security risk services, Indirect tax, Customer service, Procurement/purchasing, Cost cutting, Category management, Distribution strategy, Lean & Six Sigma, Operational review, Outsourcing advice, Process design, re-engineering & automation, Strategic sourcing/offshoring services, Supply chain management, **Sustainable supply chain**.

Sustainable workforce

Functional & industry application integration, AI advice & implementation, Change management, Innovation strategy, Stakeholder management, Labour & employment law, Performance management, Pension fund evaluation & advice, Leadership, Risk management, Ideation, Innovation management, Strategies for growth from innovation, Contract staffing supply, Executive interim, Executive search, Talent sourcing, Benefits, compensation & pensions, excluding actuarial & investment advice, Employee engagement, HR strategy & effectiveness, Organisational design & culture, Talent management, Team effectiveness

& collaboration, **Diversity & inclusion, Purpose-led strategy & change, Resource-efficiency implementation, Resource-efficiency strategy, Social impact & trust**.

Business transformation

Functional & industry application integration, Oracle, Programme management, AI advice & implementation, Third-party assurance, Corporate identity, Public relations & affairs, Change management, Marketing & communication strategy, UX & service design, Brand strategy, Property & estate management, Target operating model.

Technology transformation

Microsoft, Functional & industry application integration, SAP, Oracle, Robotics advice & implementation, Solution architecture, Programme management, Salesforce, Workday, Vendor selection, IoT and connected devices, AI advice & implementation, Cloud implementation, Building & engineering analytics, ERP consulting, Cloud advice, Data visualisation, business intelligence & semantic layer, Machine learning, Geospatial advice & implementation, IT strategy, planning & review, Advanced analytics, Data warehousing & database management, **Clean technology, Green IT**.

Infrastructure services

Microsoft, Solution architecture, AI advice & implementation, Cloud implementation, Building & engineering analytics, Network installation, Network optimisation, Network strategy & architecture, Physical product quality assurance & testing, Physical product R&D, Product & industrial design, Technical feasibility assessment, prototyping & mock-ups, Real estate deal/transaction services, International development, Corporate, occupier services & facilities management, Integrated real estate developer services, Real estate strategy, Exterior building design, Interior building design, Landscape design, Infrastructure design, Transport infrastructure, planning & engineering, Urban design & planning.

Contributors

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

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Meet the expert

Joel Bradbury

Joel is a writer specialising in the analysis of emerging trends within the professional services market. He conducts in-depth research on consulting use globally and in specific geographies and sectors, on topics ranging from crisis response to trends within the nascent sustainability consulting market. His expertise lies in the identification of new ideas and forces shaping the industry, and how they are influencing behaviours within the consulting market.

Joel Bradbury

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