

EXTRACT



Market Trends

MARKET

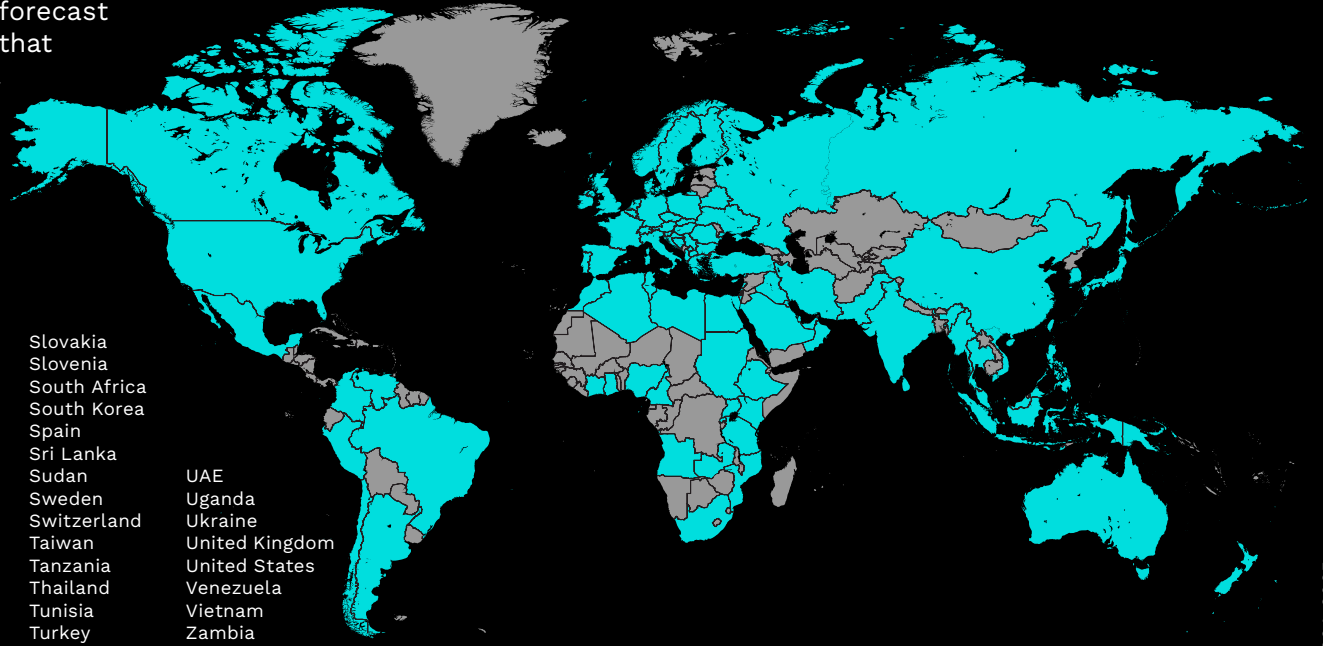
The Technology Consulting
Market in 2024-2025

Report

Dec 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

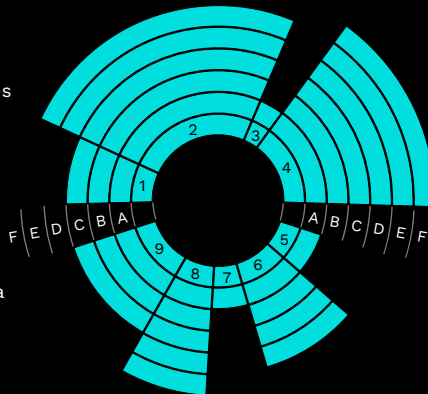
Countries covered

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	UAE
Belarus	Denmark	Ireland	Netherlands	Romania	Switzerland	Uganda
Belgium	Egypt	Israel	New Zealand	Russia	Taiwan	Ukraine
Bosnia	Ethiopia	Italy	Nigeria	Rwanda	Tanzania	United Kingdom
Brazil	Finland	Japan	North Macedonia	Saudi Arabia	Thailand	United States
Bulgaria	France	Kenya	Norway	Serbia	Tunisia	Venezuela
Cameroon	Germany	Kuwait	Oman	Singapore	Turkey	Vietnam
Canada	Ghana	Lebanon				Zambia

Sector model

Sectors

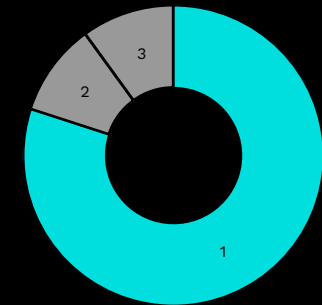
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & life sciences
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



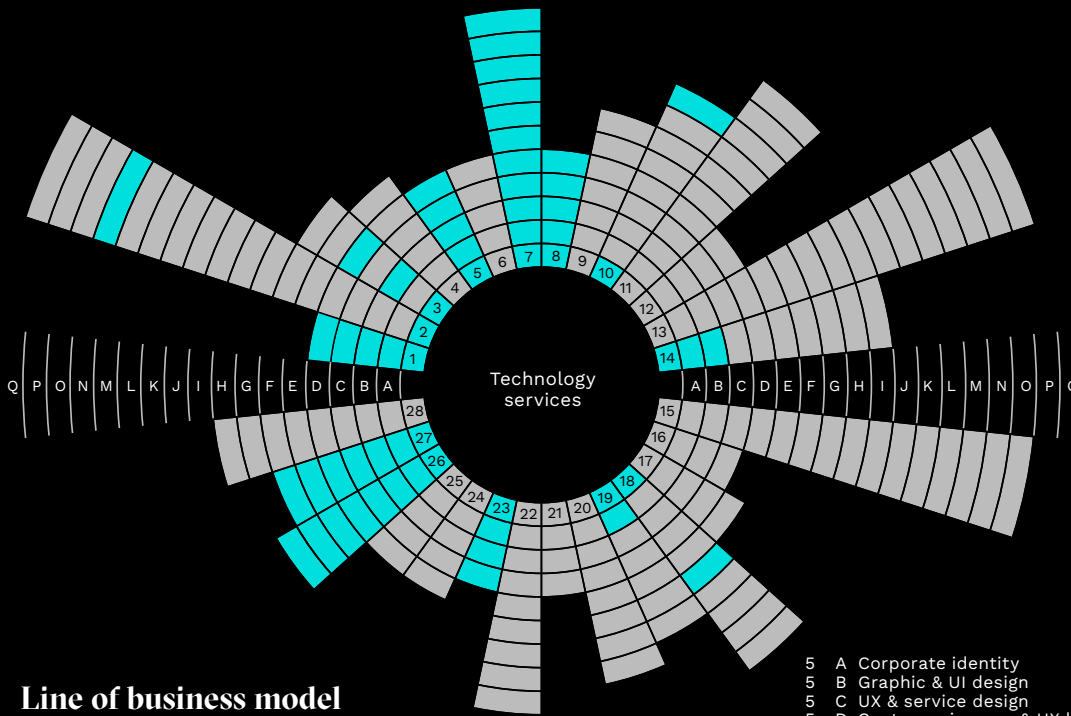
Sub-sectors

- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 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 Distribution strategy
- 13 F Lean & Six Sigma
- 13 G Operational review
- 13 H Outsourcing advice
- 13 I Post-M&A integration
- 13 J Process design, re-engineering & automation
- 13 K Procurement/purchasing
- 13 L Property & estate management
- 13 M Sales & distribution planning
- 13 N Sales force effectiveness
- 13 O Supply chain management
- 13 P 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 center 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 DevOps
- 26 D Digital product R&D
- 26 E IoT and connected devices
- 26 F Solution architecture
- 26 G 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
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- 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.

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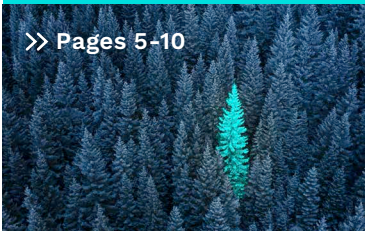
What really matters

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 11-17



3

Client priorities

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

>> Pages 18-26

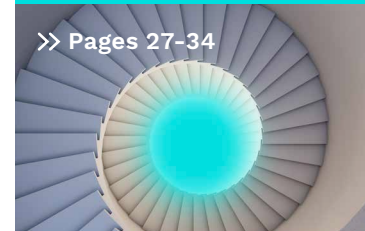


4

What does this mean for firms?

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

>> Pages 27-34



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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



“We are seeing increased investments in the banking industry, where new projects are being driven by digital transformations, in areas like payments, by the rise of compliance & reporting, or a need for greater efficiency.”

Arnaud Balssa, Capgemini Invent

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3

Investment in digital technology will increase, and firms need to show they can build on and adapt transformation programmes.



95%

of clients will increase their investment in digital technology over the next 18 months

Two in three clients say they need to upgrade their technology as soon as possible. The figure increases to 74% when considering only those companies that have undergone a digital transformation process. This highlights the cyclical nature of investment in technology. Despite making significant investments, clients find themselves stuck in a cycle of searching for the latest cutting-edge technology that will allow them to build data-driven business cultures, enhance customer experiences, and boost organisational resilience. This is why 95% of clients say they will increase their investment in digital technology over the next 18 months and over half say this uplift will be considerable.

Firms are in a good position to benefit from this investment climate, not least because there is a concern around the paucity of employee skills for data & analytics, and the adoption of the latest technologies. It is important that firms show they can adapt to technology developments and build on existing transformation programmes: Twenty-six percent of clients that have used Big Four firms for recent digital transformations reported that the technology was already outdated. Firms must support their clients' growth planning into the future and ensure the adoption of emerging technologies can be used over time to improve critical decision making, identify patterns of customer behaviour, and automate repetitive business tasks.

2



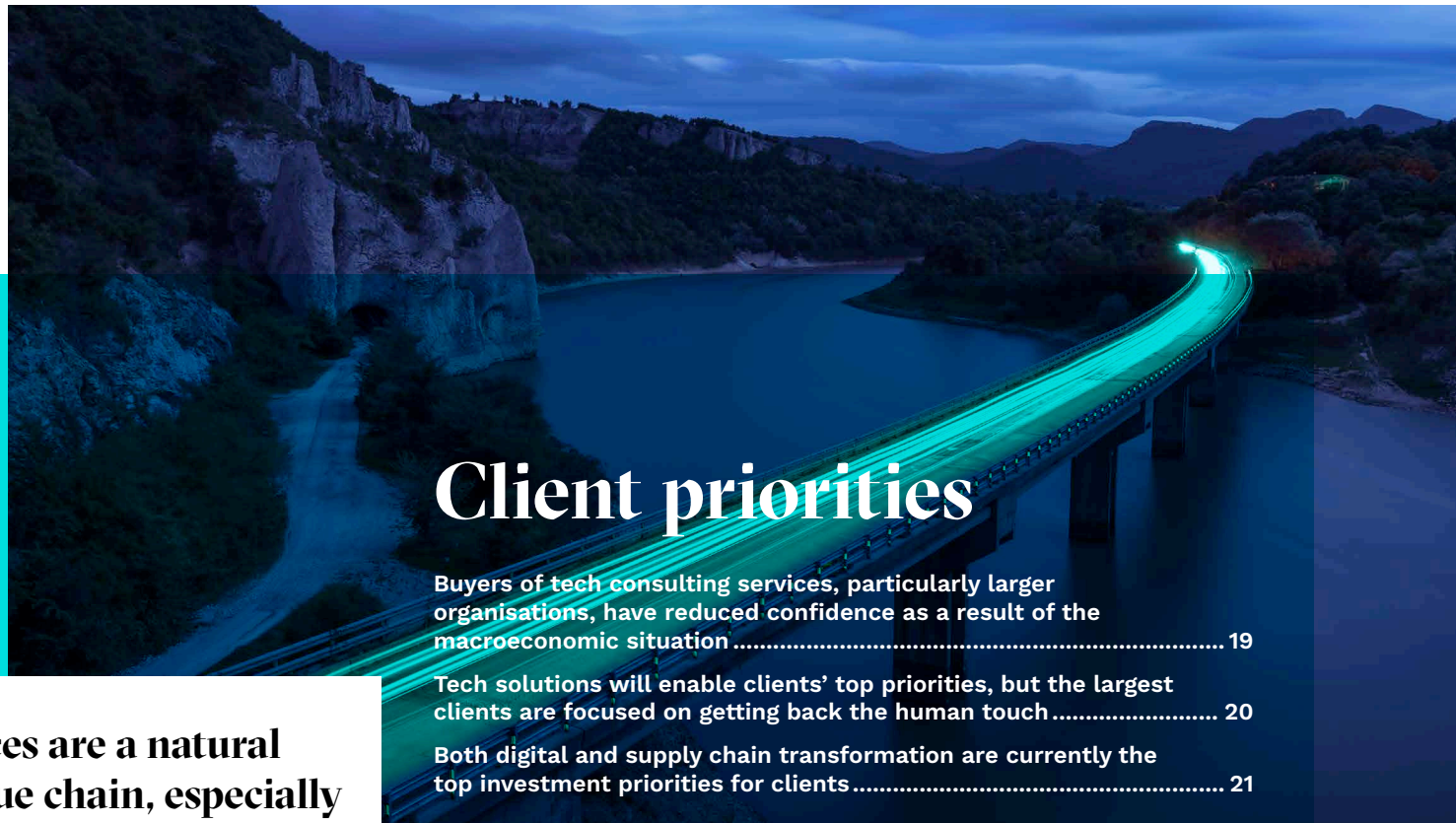
“We’re [expecting the] industries that didn’t perform as well to pick up. With interest rate cuts in the US and the election being over, a lot of those early-stage buying cycles are starting to pick up steam.”

Bob Lavoy, Crowe

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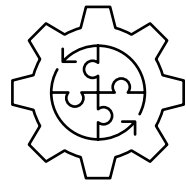
Client priorities

“Managed services are a natural extension of the value chain, especially for processes that are decisive for innovation or revenue generation. Clients are also happy for someone else to take over things like compliance, regulatory work, tax, or accounting.”

Dr. Ulrich Störk, PwC

- Buyers of tech consulting services, particularly larger organisations, have reduced confidence as a result of the macroeconomic situation 19
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Tech solutions are increasingly being explored to replace mid-level and low-level jobs



83%

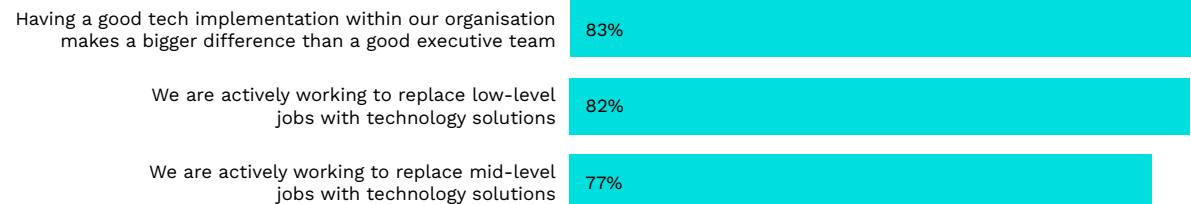
of clients agreed that a good tech implementation makes a bigger difference than a good executive team

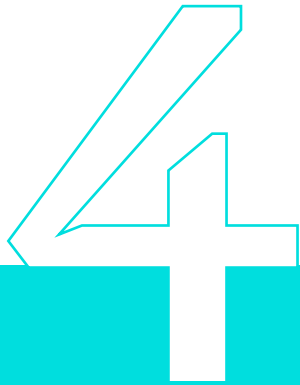
Clients are increasingly seeing technology solutions as a method of replacing some of their employees. The vast majority (around four fifths) of clients surveyed said that they are actively working to replace both mid-level and low-level jobs with technology solutions. This is somewhat expected as employees are often one of the most unpredictable elements of a business's operation. However, it is also worth pointing out that "actively working" does not mean that it would be successful, or that it will ever actually be implemented. Slimming down a workforce places a greater strain on the staff that remain, which could exacerbate problems even if some costs could be cut.

One finding that was somewhat surprising considering the seniority of the clients surveyed was that 83% agreed that a good tech implementation makes a bigger difference than a good executive team. This suggests that their existing tech implementations are not as optimised or as efficient as they should be, and need further improvement and/or transformation. A bad or inefficient technology implementation can create more problems than it solves, which could explain how a tech stack could be more valuable than a C-suite member.

Figure 10

Percentage of clients either agreeing or strongly agreeing with the following statements





What does this mean for firms?

“Traditional strategy firms are increasingly developing their tech consulting capabilities, often to address Proofs of Concept and very high-level approaches. We’re also seeing more smaller, niche players with very specific vertical value propositions.”

Arnaud Balssa, Capgemini Invent

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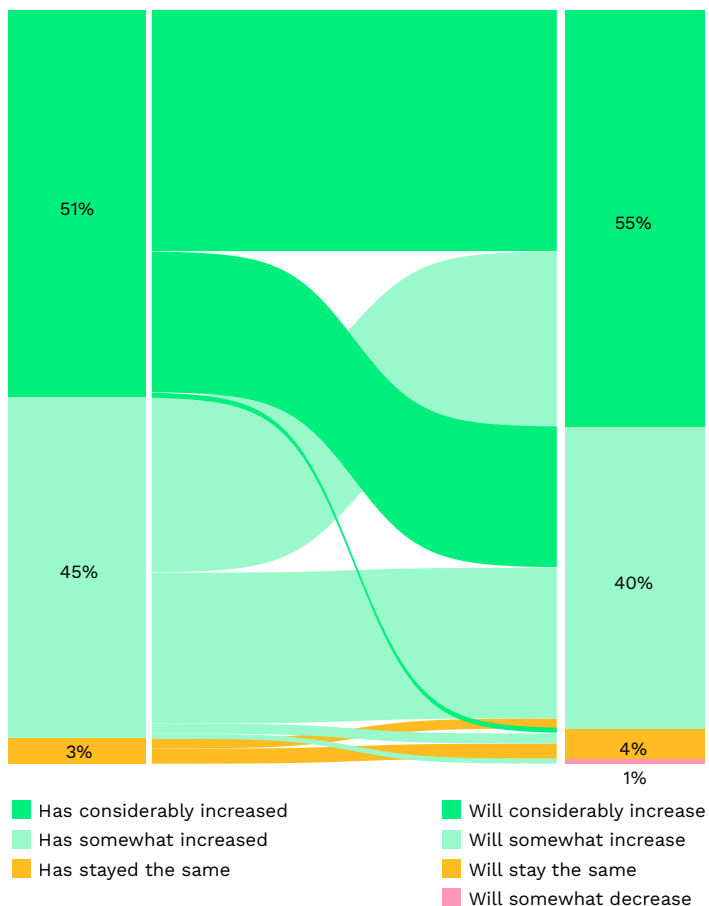
Clients are not slowing down investments in new technologies

Figure 15

How has your organisation's investment in digital tech changed in the last year?

How has your organisation's investment in digital technology changed in the last year?

To what extent do you expect your organisation's investment in digital technology to change in the next 18 months?

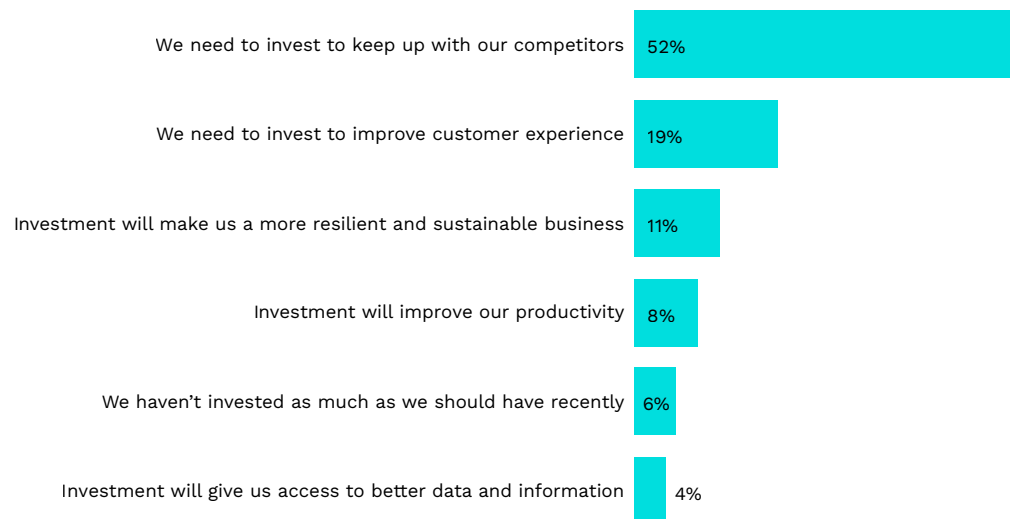


Clients' investments in digital technologies continue to increase, with no signs of slowing down. As we have seen consistently throughout most recent years, technology is not an area clients are looking to cut costs. More than 90% of clients increased their investment last year, and more than 90% of clients expect to increase it over the next 18 months—and a large portion of these are to a significant extent in both cases.

The main reason for this continued increase in investment appears to be a persistent fear of missing out or falling behind. More than half of clients surveyed said the main reason for their increased investment is to keep up with competitors. Technology advances, especially in AI over the past few years, have accelerated, further feeding client fears. This will help firms close bigger projects in this space, but ultimately without substance behind promises, clients might be left disappointed. Firms need to manage clients' expectations and make sure they demonstrate the practical benefits of new technologies, including AI.

Figure 16

What is the main reason for the increased investment in digital technology in the next 18 months?



5



“Interestingly, we’re seeing that our clients have a shortage of technology skills for older, legacy technology. Technologists coming out of school are not interested in working with ‘old code’.”

Kim Bozzella, Protiviti

Insights from consultants

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- Pat Sullivan, Global Digital Engineering Lead, EY..... 40**

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“AI is already doing the work of consultants and we are embracing that; we have done several pilots where AI has delivered up to 40% of the programme.”

Pat Sullivan, EY

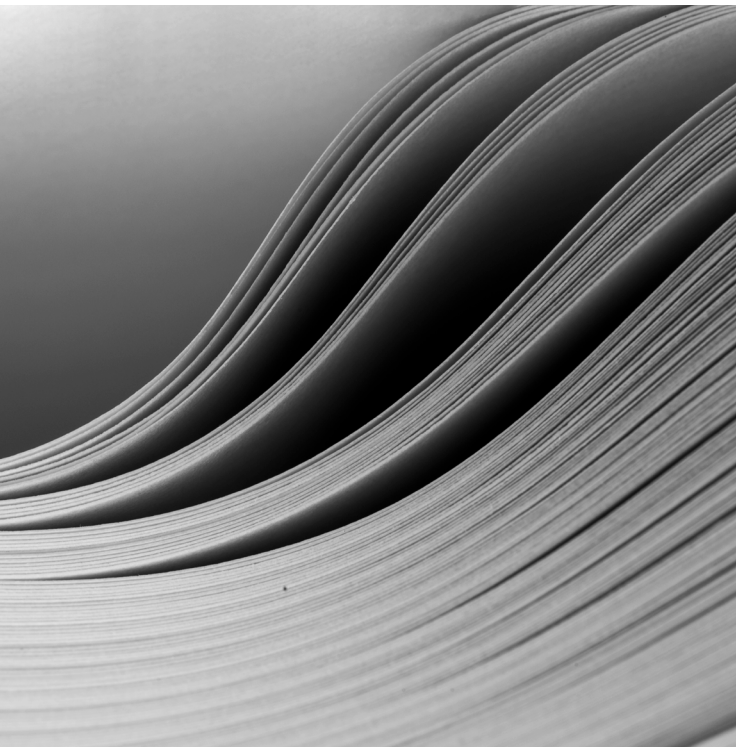
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Our approach to gathering data

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 technology advisory services are affecting clients' organisations and their use of consulting. Our survey focuses on trends in technology advisory services, providing detailed insights into the nuances of the market. For this, we surveyed 150 senior clients of consulting firms from across technology advisory services, 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.

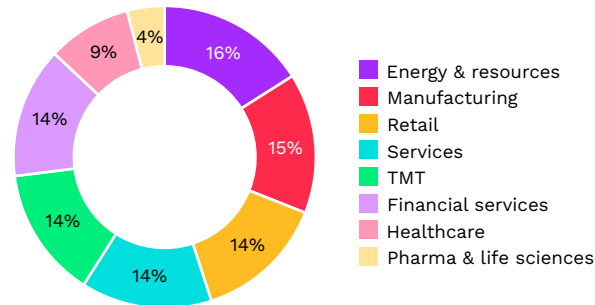
Insights from consultants

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.

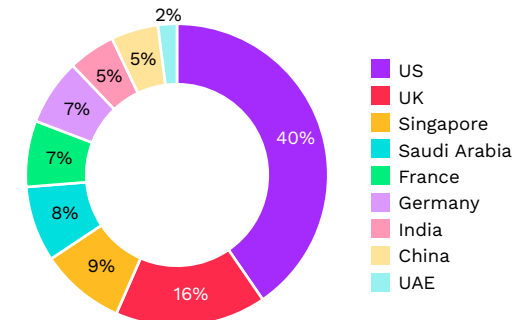
In-depth desk research

We also conducted a thorough PEST analysis in technology advisory services 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.

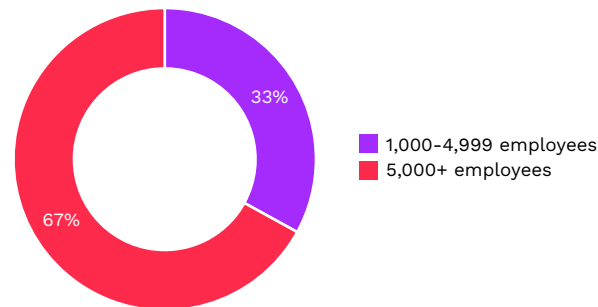
Respondents by sector



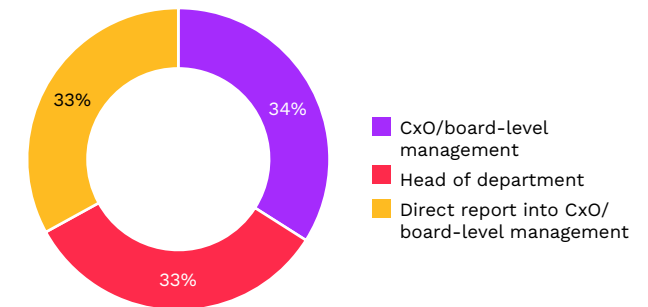
Respondents by geography



Respondents by organization 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 & 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 three categories of technology services. Please note that for some lines of business, we've taken a subset of the relevant capabilities and excluded others. For our full line of business model, please refer to the map on page 3 of this report.

Advisory

Cybersecurity advice, Cybersecurity incident response, Penetration testing & wargaming, Technology due diligence, Network strategy & architecture, Digital product quality assurance & testing, Digital product R&D, IoT and connected devices, Solution architecture, Clean technology, Green IT, Cloud advice, ERP consulting, IT strategy, planning & review, IT training, Programme management, Vendor selection.

Implementation

Cybersecurity implementation, Data warehousing & database management, Machine learning, Network installation, Network optimisation, DevOps, Application development, Virtual, augmented & mixed reality, Functional & industry application integration, Microsoft, Oracle, Salesforce, SAP, Workday, AI advice & implementation, Cloud implementation, Geospatial advice & implementation, Robotics advice & implementation.

Tech-supported

IT outsourcing, Building & engineering analytics, Advanced analytics, Data visualisation, business intelligence & semantic layer, Corporate identity, Graphic & UI design, UX & service design, Customer journey & UX benchmarking, eDiscovery, Forensic technology solutions, Technology & security risk services.

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).

Name	Job title	Organisation
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Kim Bozzella	Global Leader of Technology Consulting	Protiviti
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Meet the expert

Tony Maroulis

Tony is an experienced principal consultant in our Market Trends team, working on a range of regular and bespoke reports. Additionally, he's worked on some of our most complex custom research projects, including designing and analysing surveys, and identifying growth opportunities for major consulting firms in emerging markets.

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About us

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

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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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Publication schedule for 2025

2025		Market Trends Reports	Market Trends Briefings	Client Perceptions Studies	Emerging Trends Programme	White Space Reports	White Space Insights
Q1	January	Forecasts for 2025					Featured thought leadership (monthly) Quarterly webinar series
	February	UK US GCC		UK US	ET1		
	March	France		GCC France		Quality Ratings Report (QRR)	
Q2	April	Nordics DACH	India South America	Germany Australia China	ET2		Featured thought leadership (monthly) Quarterly webinar series
	May	Australia East Asia South East Asia		Japan Retail Energy & Resources			
	June	Africa		Financial Services Technology, Media & Telecoms	ET3	Client Perceptions of Thought Leadership	
Q3	July	Energy & Resources Financial Services	Healthcare & Pharma				Featured thought leadership (monthly) Quarterly webinar series
	August	Technology, Media & Telecoms			ET4		
	September	Sustainability		Risk Tax		Thought Leadership Innovation	
Q4	October	Tax Risk	Public Sector	Audit Technology	ET5		Featured thought leadership (monthly) Quarterly webinar series
	November	Technology					
	December	Planning for Growth in 2026			ET6 What Clients Will Want in 2026	Hot Topic Report	