

EXTRACT



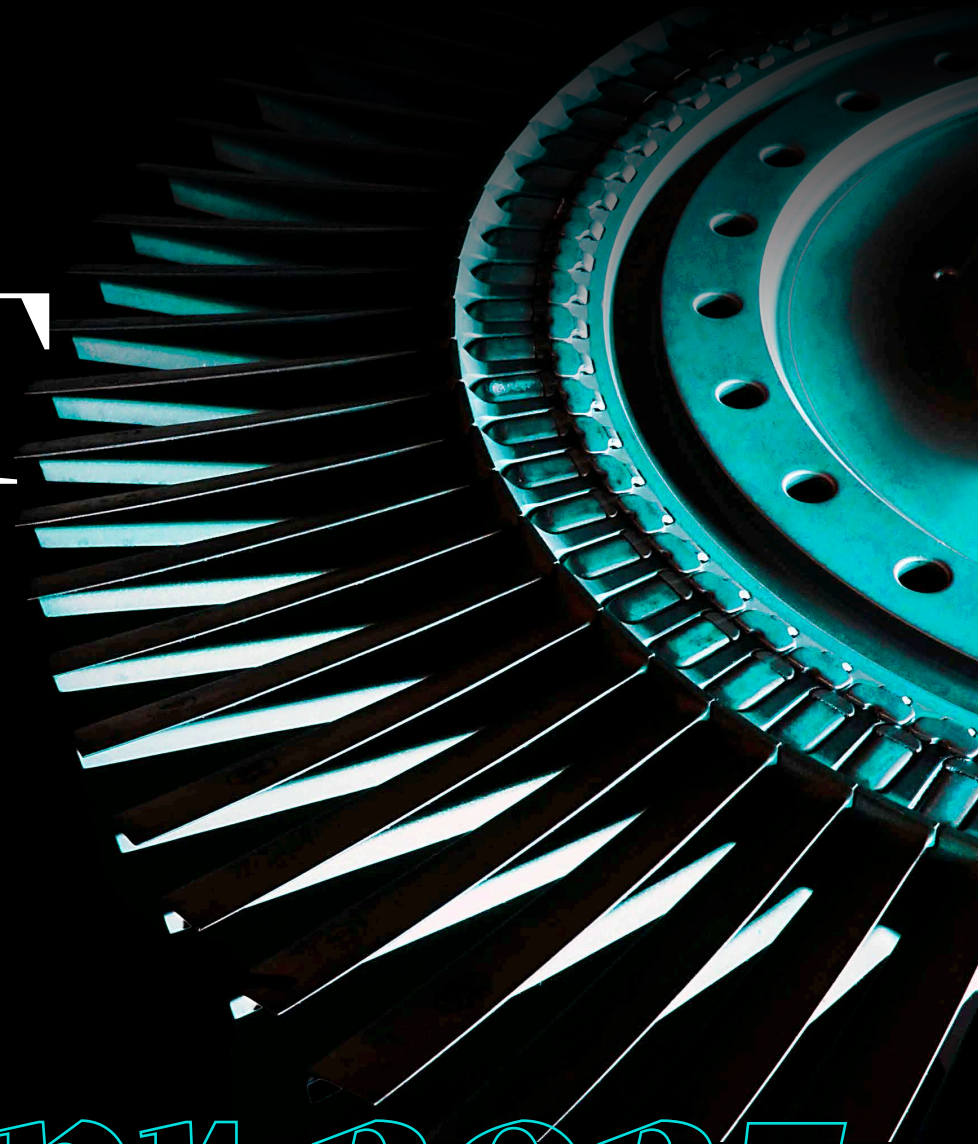
Market Trends

MARKET

The DACH Consulting
Market in 2025

Report

Apr 2025



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

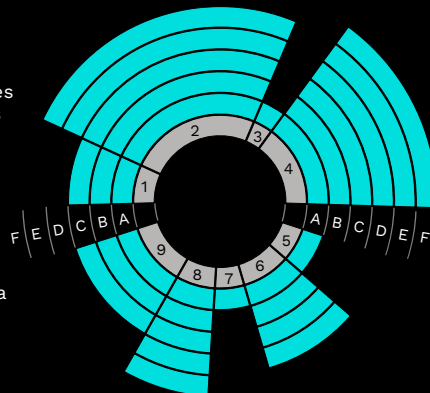
Albania	Chile	Greece	Libya	Pakistan	Slovakia
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia
Angola	Colombia	Hungary	Malaysia	Peru	South Africa
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea
Australia	Croatia	Indonesia	Morocco	Poland	Spain
Austria	Cyprus	Iran	Mozambique	Portugal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

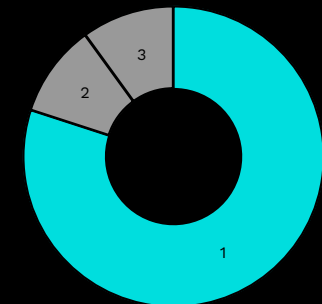
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & life sciences
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



Sub-sectors

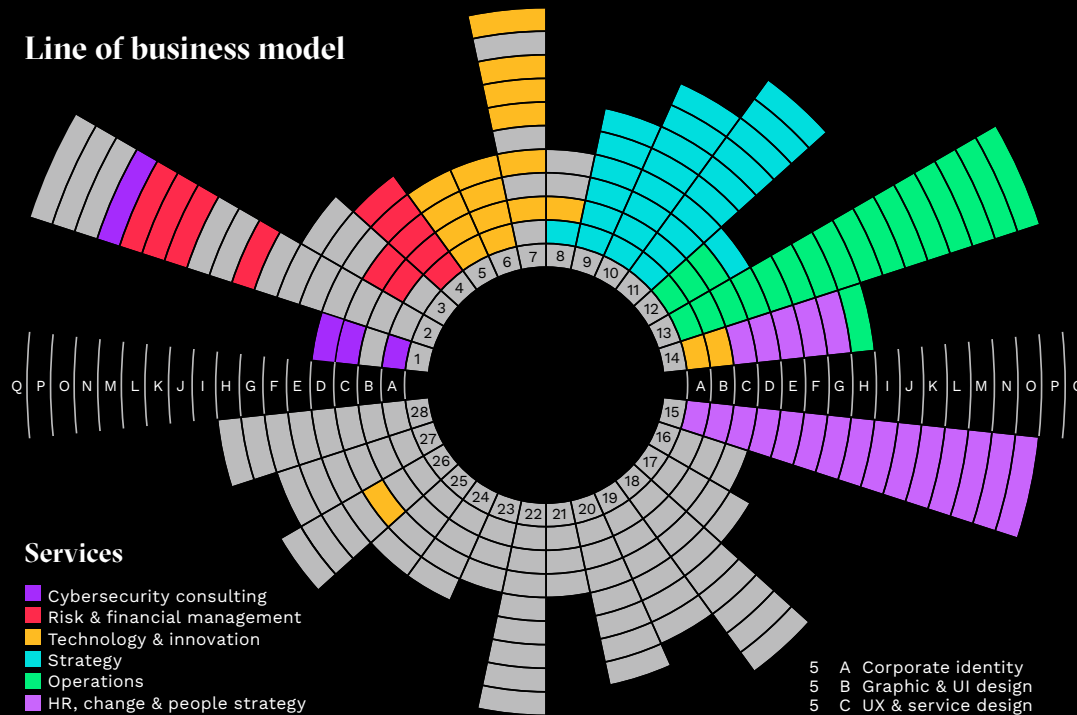
- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 1 A Energy | 4 A Aerospace | 8 A Business services |
| 1 B Primary resources | 4 B Automotive | 8 B Leisure |
| 1 C Utilities | 4 C Construction | 8 C Logistics |
| 2 A Banking | 4 D Consumer electronics | 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



Services

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

Line of business

- Cybersecurity
- Risk
- Forensic
- Financial management
- Design & UX
- Innovation
- Technology
- Data & analytics
- Research
- Deals
- Strategy
- Real estate
- Operations
- Sustainability
- HR & change
- Architecture
- Audit & assurance
- Business process outsourcing
- Civil engineering
- Legal
- Litigation
- Marketing & creative
- Network engineering
- Product engineering & R&D
- Recruitment
- Software engineering
- System integration
- Tax

Capabilities

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

- A Corporate identity
- B Graphic & UI design
- C UX & service design
- D Customer journey & UX benchmarking
- A Ideation
- B Innovation management
- C Innovation strategy
- D Strategies for growth from innovation
- A AI advice & implementation
- B Cloud advice
- C Cloud implementation
- D ERP consulting
- E Geospatial advice & implementation
- F IT strategy, planning & review
- G IT training
- H Programme management
- I Robotics advice & implementation
- J Vendor selection
- A Advanced analytics
- B Data visualisation, business intelligence & semantic layer
- C Data warehousing & database management
- D Machine learning
- A Customer feedback
- B Customer segmentation
- C Employee feedback
- D Environmental & social impact research
- E Macro/microeconomic research
- F Market research
- A Capital allocation strategy
- B Commercial due diligence & valuation
- C Financial due diligence
- D M&A transaction strategy
- E Operational due diligence
- F Portfolio & investment strategy
- G Public-private partnerships
- H Technology due diligence

- A Business & financial modelling
- B Category management
- C Channel management
- D Corporate recovery & turnaround
- E Corporate restructuring
- F Corporate strategy
- G Market analysis & strategy
- H Policy formulation
- I Pricing
- J Strategic sourcing/offshoring services
- A Corporate, occupier services & facilities management
- B Integrated real estate developer services
- C Real estate deal/transaction services
- D Real estate strategy
- A Benchmarking
- B Business continuity & recovery
- C Cost cutting
- D Customer service
- E Distribution strategy
- F Lean & Six Sigma
- G Operational review
- H Outsourcing advice
- I Post-M&A integration
- J Process design, re-engineering & automation
- K Procurement/purchasing
- L Property & estate management
- M Sales & distribution planning
- N Sales force effectiveness
- O Supply chain management
- P Target operating model
- A Clean technology
- B Green IT
- C Purpose-led strategy & change
- D Resource-efficiency implementation
- E Resource-efficiency strategy
- F Social impact & trust
- G Sustainable investment
- H Sustainable supply chain
- A Benefits, compensation & pensions, excluding actuarial & investment advice
- B Change management
- C Diversity & inclusion
- D Employee engagement
- E Governance & board effectiveness
- F HR strategy & effectiveness
- G Leadership
- H Organisational design & culture
- I Organisational training & development
- J Outplacement
- K Pension fund evaluation & advice
- L Performance management
- M Stakeholder management
- N Talent management
- O Team effectiveness & collaboration
- A Exterior building design
- B Interior building design
- C Landscape design
- A Accounting operations assurance
- B Accounting systems assurance
- C Corporate reporting
- D IFRS & regulatory reporting
- A Contact center outsourcing
- B Document management outsourcing
- C Finance accounting outsourcing
- D Human resources outsourcing

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

Contents

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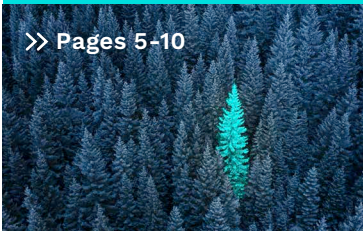
What really matters

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



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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.

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Client priorities

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

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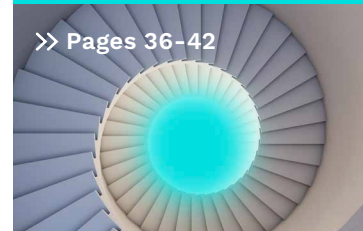


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We take a look at the factors influencing clients' buying behaviours, and what this means for the services firms provide.

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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 a recessionary environment,
the impact is felt first in
consulting and service industries,
and we’re still navigating
economic uncertainty.”**

Alexander Lippner, KPMG

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3

Clients are **looking to trusted firms** to help them build a clear strategic path to navigate their new challenges.



85%

of clients tell us they rely heavily on consulting services in 2025, up from 55% in 2024

The complexity of the business landscape makes it more likely that clients will turn to consulting services in 2025: Not only must they manage costs carefully, but they also need to invest for the future. However, what clients want from consulting has changed. Whereas in 2024, they told us they were looking for radical solutions, now it is concrete results. There has also been a shift from working with new firms to working with ones they already know, suggesting clients are focused on trust to make sure the projects they embark on are carried out well.

Many clients are deeply concerned that they are dealing with a new range of issues and challenges, most of which they have little prior experience of. This is why trust is so important. But so too is expertise on specific challenges, be it around workforce management, business model adaptation, or building resilience. Over 50% of clients tell us they want more conversations with consulting firms around the specific business challenges they face.

Clients are aiming to set a clear strategic path to meet the demands of an evolving set of political, economic, regulatory, and consumer trends. It is in this context that 58% of organisations say they will work more with strategy firms over the next 12 months and 57% say they will use the Big Four firms more this year.

2



Market overview

“It was a challenging year for the economy. There was high demand in restructuring, performance, and transformation work, but lower demand in automotive and energy intensive industries like chemicals and steel.”

Torsten Henzelmann, Roland Berger

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Clients in pharma and energy are set to see the strongest growth in consulting spending, but financial services remains the largest industry 18

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“Overall, the outlook for 2025 tends to be challenging, with a key focus on survival and future-proofing. Clients are prioritising cost efficiency and are looking to integrate AI both in their internal processes and in customer-facing products.”

Marco Lehmann, KPMG

Client priorities

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Skills relating to developing new products and data & analytics are the most in-demand

When asked about which capabilities were very important to have within their organisation, skills relating to the development of new products & services, financial management, and data & analytics came out on top. With clients' confidence dented by consumers economising on services, they are eager to develop products and services that will attract the attention of consumers even when their buying confidence has been impacted.

Financial management was also deemed as being a particularly important category, a sign that cutting costs are still at the forefront of clients' minds in the DACH region. We know this as 55% of clients told us that they are likely to cut discretionary costs in the next 12 months as a result of the current macroeconomic climate in the region. Another 35% say they will limit recruitment over this same period.

When we asked clients about which skills are the hardest to recruit, again two customer-centric capabilities come out strongly: the development of new products & services and customer experience. With the most important skill to clients in short supply, there is an opportunity for firms to help fill this gap. Other areas of concerns around workforce are more technology-focused, namely data & analytics and technology implementation. Business intelligence tools are becoming increasingly important for clients as they start to make the best use of emerging technologies, such as automation and AI.

The race to attract the right talent is particularly important at the moment, with 61% of clients telling us they expect over half of their workforce to need very different skills in the next three years. And these skills will not just relate to the adoption of new technologies—organisations say that expertise in risk & resilience, sustainability/ESG, and change management will be even more pressing.

Figure 14

Importance of capabilities vs. shortage of skills

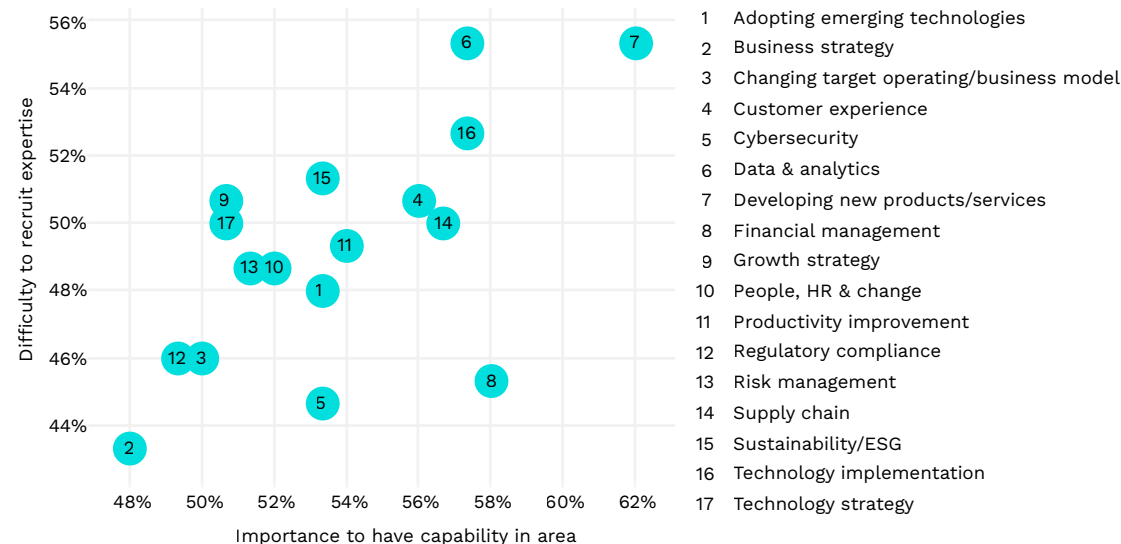
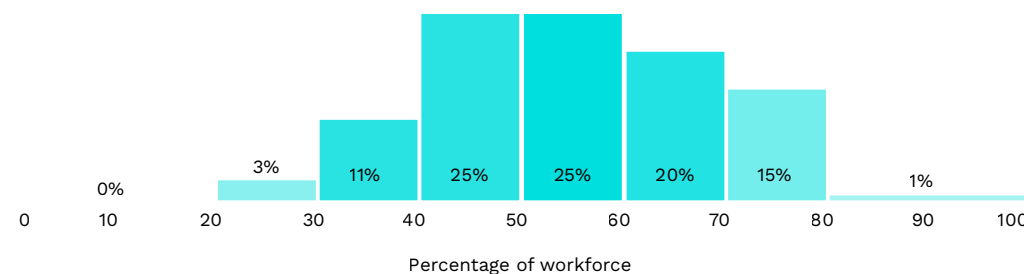


Figure 15

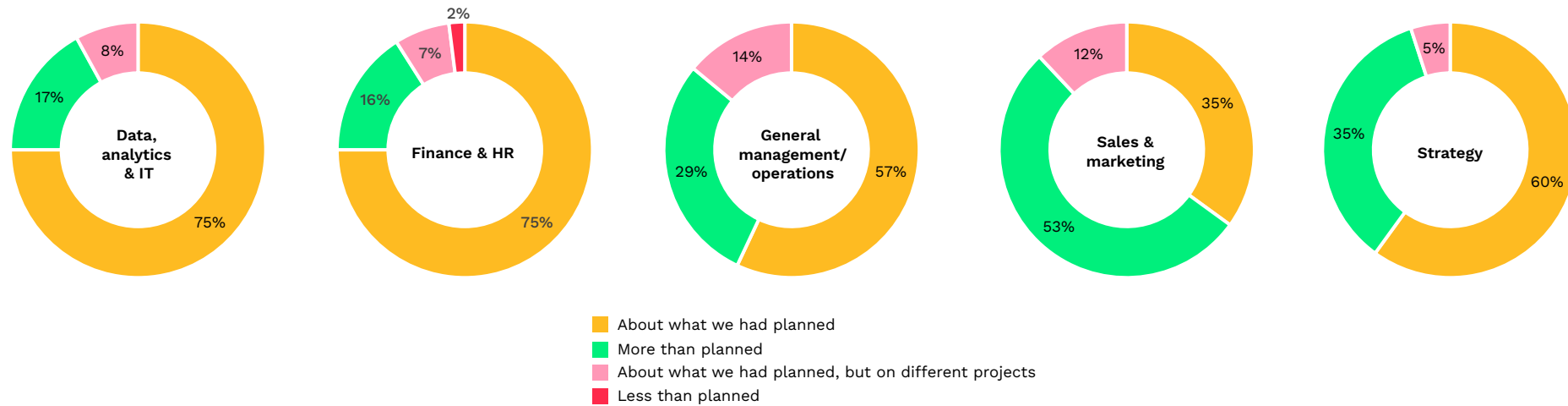
In your opinion, what proportion of your workforce is likely to need very different skills in the next three years?



But that's not to say that this discipline is uniform. There are some functions that are more likely to spend more than they originally planned, and consulting firms have a better chance to be opportunistic here. While finance and IT departments tend to be more rigid in their plans for spending, over half of buyers of consulting services in sales & marketing functions told us they spent more than planned. Executives in strategy or operations departments are also more likely to be agile on how they spend on consulting projects throughout the year.

Figure 28

Did your function spend more or less on consulting last year than you had originally planned?



4

“AI could be a game changer. If you can analyse, aggregate and report data with AI, a single consultant can bring in more results in the same timeframe. This could result in some kind of performance element.”

Nikolaus Schmidt, Klaiton

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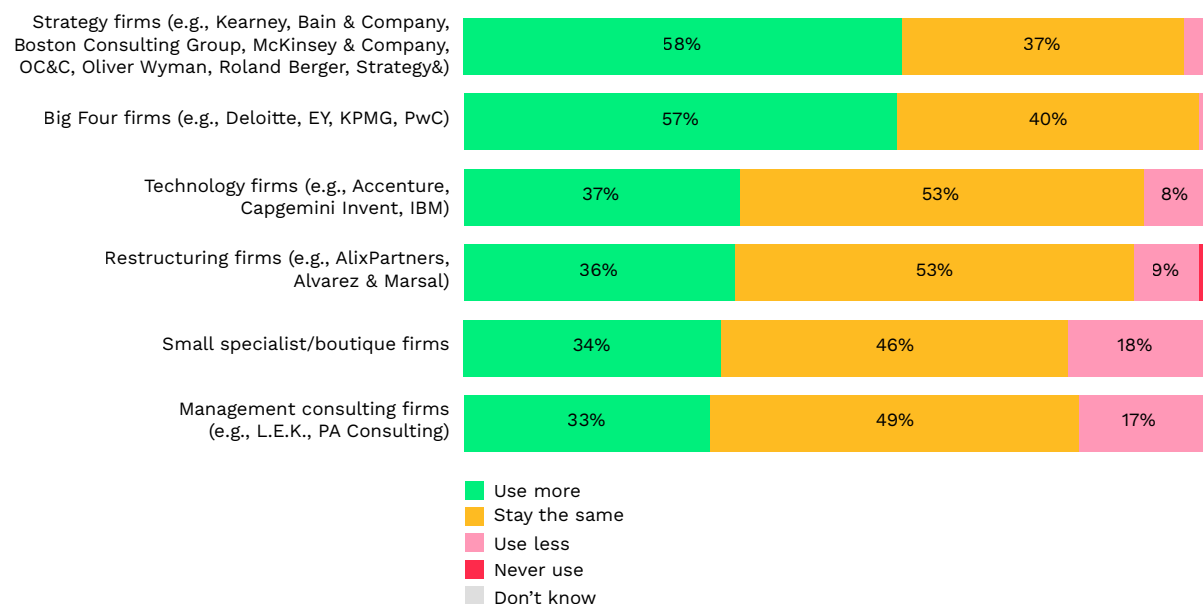
Clients are more likely to work with strategy firms than at any time over the last three years

Clients understand the business landscape in 2025 is a challenging one, with economic stagnation, geopolitical conflict, and ongoing uncertainty for businesses. Despite this, clients cannot stand still. In many cases, they may need to adapt their business model, become more resilient, enter new markets, or develop new products and services. Much of what they need to focus on is setting a new strategic direction to meet a series of evolving economic, political, regulatory, and consumer behaviour needs.

It is in this context that 58% of clients tell us they will work more with strategy firms over the next 12 months, a big jump from 34% in 2024. There is also a big increase in the proportion looking to work with Big Four, as 57% say they will also work more with these firms. These two firm types finish well ahead of the others, with only 37% of organisations saying they will work more with technology firms. It seems that despite clients telling us they need to improve their technology infrastructure, and in some cases adopt emerging technologies over the next 12 months, strategy firms and the Big Four still have the upper hand on clients saying they will work more with them.

Figure 40

In the next 12 months, how will the type of consulting firm your organisation looks to work with change?



5



“Since AI is heavily reliant on data, establishing an effective data strategy is crucial, and there’s significant progress to be made in this area. AI continues to be a top priority in boardrooms, although the initial hype has diminished.”

Damir Maras, PwC

Insights from consultants

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“Our focus in the ESG space is shifting from reporting projects to transformation projects. With the EU easing up on ESG regulations, many are scaling back their efforts.”

Christoph Treichler, Cardea

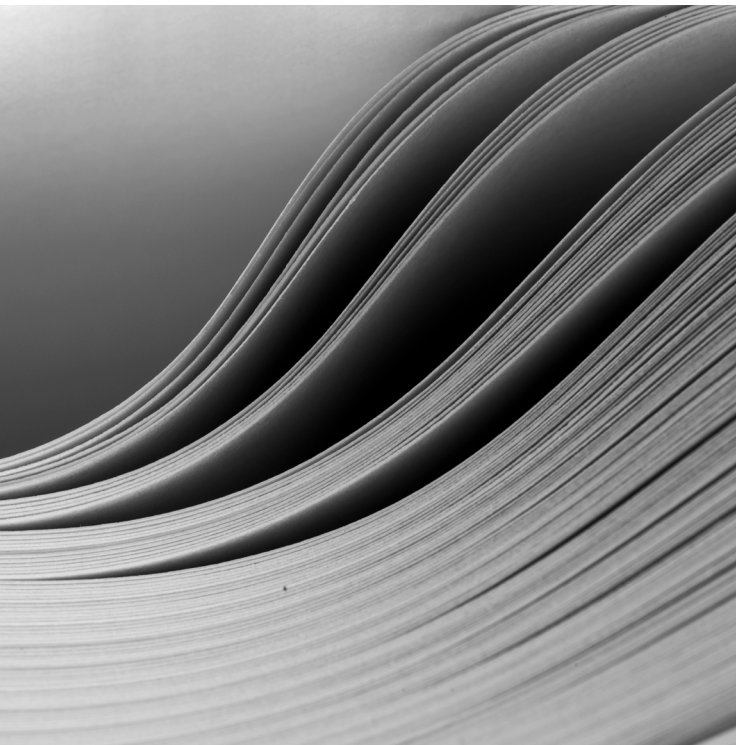
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Our approach to gathering data

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 = £0.78

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 150 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 2025 and the first half of 2026
- 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.

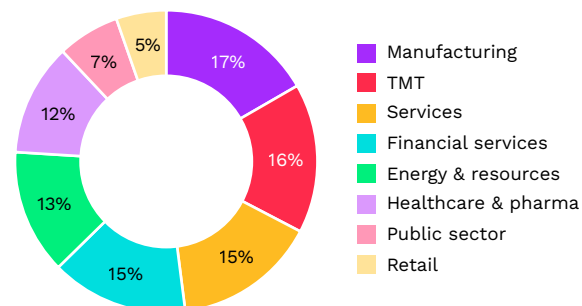
Insights from consultants

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.

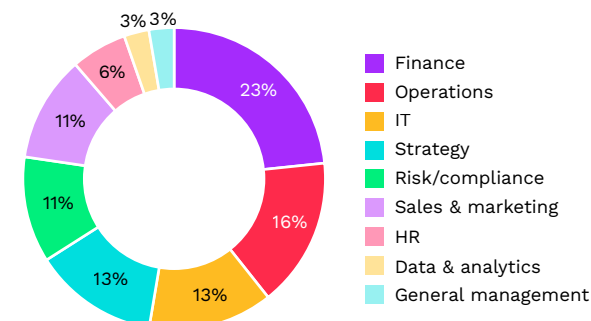
In-depth desk research

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.

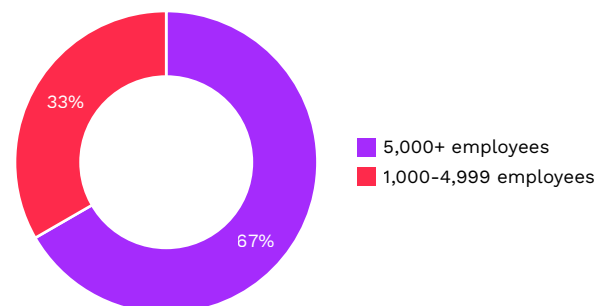
Respondents by sector



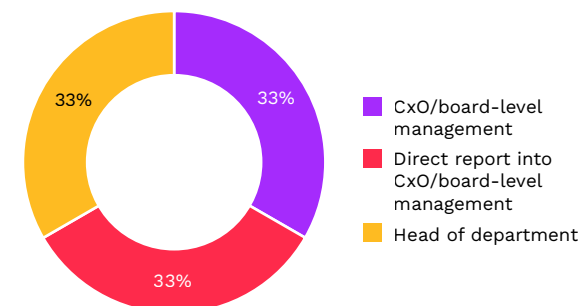
Respondents by function



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 & 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 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.

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
Torsten Henzelmann	Chairman and Managing Director, DACH	Roland Berger
Marco Lehmann	Head of SAP & Finance Transformation, KPMG Germany	KPMG
Alexander Lippner	Partner, Head of Advisory	KPMG Austria
Damir Maras	Global Advisory Leader and Germany Consulting Solutions Leader	PwC
Nikolaus Schmidt	Co-Founder & Managing Partner	Klaiton
Christoph Treichler	Managing Partner	Cardea

Meet the expert

Nick Jotischky

Nick is Head of Market Trends at Source. Drawing on over 20 years of experience in B2B research centred on macroeconomic and geopolitical risk, Nick leads the Market Trends programme, with a focus on assessing the landscape of the professional services market by region and sector and putting meaningful insights into the hands of firms.

Nick Jotischky

✉ nick.jotischky@sourceglobalresearch.com



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.

Source Information Services Ltd
20 Little Britain | London | EC1A 7DH
UK +44 (0) 20 3743 3934
US +1 800 767 8058
info@sourceglobalresearch.com
www.sourceglobalresearch.com

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