

EXTRACT



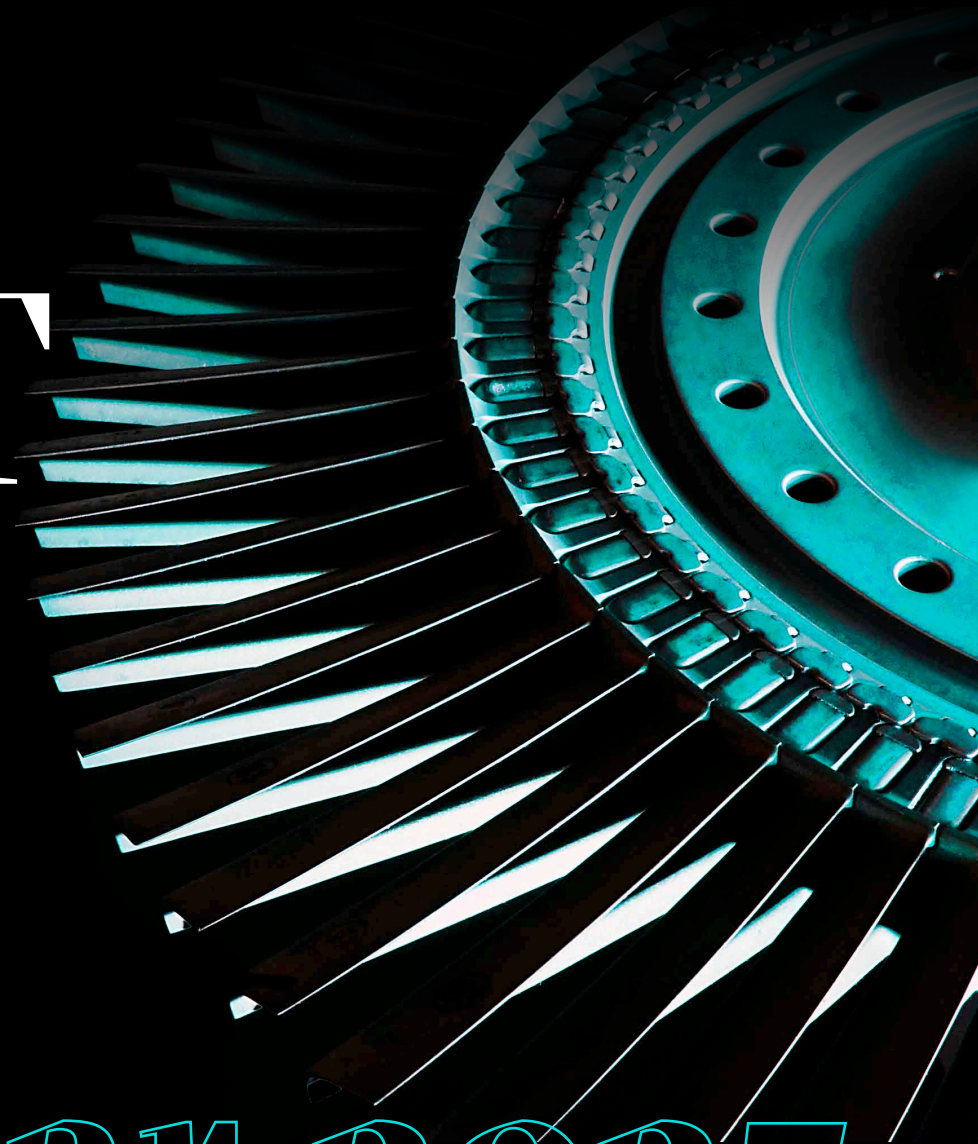
Market Trends

MARKET

The France Consulting
Market in 2025

Report

Mar 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

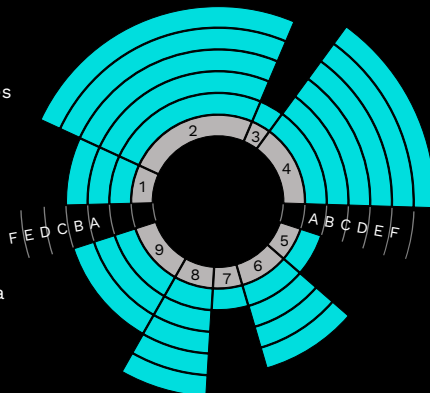
Albania	Chile	Greece	Libya	Pakistan	Slovakia
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia
Angola	Colombia	Hungary	Malaysia	Peru	South Africa
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea
Australia	Croatia	Indonesia	Morocco	Poland	Spain
Austria	Cyprus	Iran	Mozambique	Portugal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

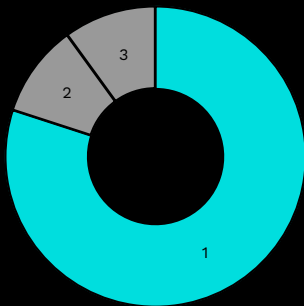
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & life sciences
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



Sub-sectors

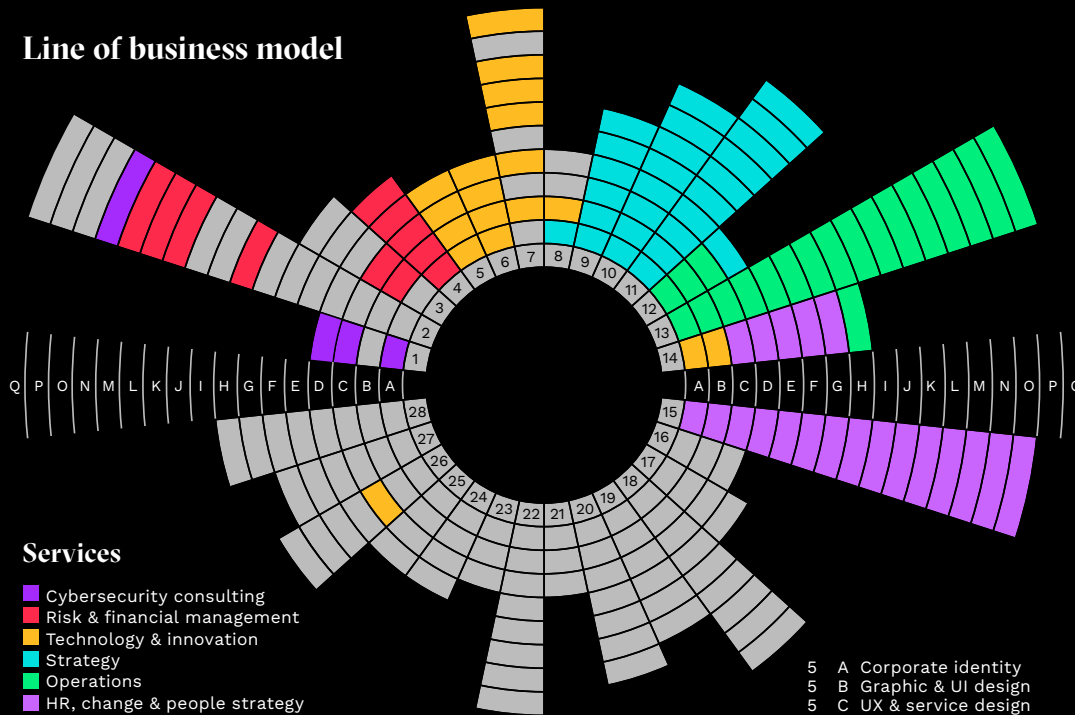
- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 1 A Energy | 4 A Aerospace | 8 A Business services |
| 1 B Primary resources | 4 B Automotive | 8 B Leisure |
| 1 C Utilities | 4 C Construction | 8 C Logistics |
| 2 A Banking | 4 D Consumer electronics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

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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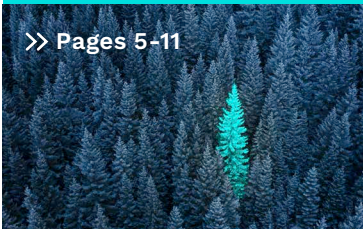
What really matters

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 5-11



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 12-18



3

Client priorities

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

>> Pages 19-34

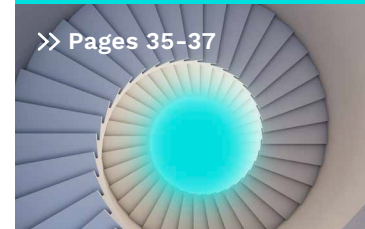


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Implications for firms

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

>> Pages 35-37



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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



“Firms should demonstrate how agile—and even patient—they can be. The ability to flex with what’s going on in the wider geopolitical sphere is crucial to success.”

John Bird, Source

What really matters

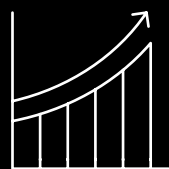
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Four things for a firm to act on

1

Growth is set to continue after political and macroeconomic uncertainty stabilises.



5%

is the forecast growth for the France consulting market in 2025

In 2024, the consulting market in France experienced a period of cautious growth in an environment marked by political instability and economic unpredictability.

The summer of 2024 marked a turning point in the way in which clients planned projects and ultimately spent on consulting services. With this considered, the market grew by 3.9% over 2024 to reach roughly €12.7bn in size, only narrowly exceeding the global consulting market average of 3% growth, as clients scaled back and fragmented larger projects into smaller, more digestible ones.

With political uncertainties easing and a clearer policy direction emerging, forecasts for 2025 indicate an acceleration in growth to 5%, bringing the market to an estimated €13.3bn. This shift hints at a renewed sense of confidence among organisations, which may soon be prepared to commit to consulting engagements that are more of a partnership and breed ongoing work. This sentiment is likely shared in other markets, as France's 5% consulting market growth aligns with the UK and the global average.

All this points to a gradual recovery, whereby businesses, now with a clearer roadmap, are likely to reinvigorate investment in transformative projects that had been sidelined during a tough 2024.

2



“The biggest part of the business comes from digital transformation and AI. Many companies are doubling down on innovation and securing their operations with regard to digital transformation and cybersecurity [due to uncertainties].”

Hervé de la Chapelle, EY

Market overview

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The consulting market in France was dogged by uncertainty in 2025, but that looks set to change	16
2024 brought muted demand for many sectors, with a particular downturn for the public sector amid a budget squeeze	17
In 2024, clients invested in their future through technology and innovation and reduced spend on their operations and HR, people & change strategy	18

3



**“Digital transformation began
10 years ago, and we’re still riding
that wave, with many large ERP
projects set to drive the market
for the next five years.”**

Laurent Choain, KPMG

Client priorities

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What are clients' top needs and priorities?

Amid political and economic instability, 87% of clients feel their confidence in their organisation has reduced, mainly due to rising debts and falling revenue

Political and economic challenges have been felt right across Europe, and France is no exception. With strong opposition in government, uncertainty around policies poses a real threat to clients' confidence in their operating environment.

Fifty-eight percent of clients feel their confidence has been significantly reduced due to macroeconomic and political tensions. This figure rises to 81% among healthcare & pharma organisations and 77% in the retail sector. In France's largest industries for consulting, manufacturing and financial services, there was slightly higher confidence—but still a greater level of significantly reduced confidence than the average (63% for both).

Clients are fighting a war on two fronts with debts exposing them to rising interest rates and falling revenue impacting profits. Thirty-two percent of clients are concerned about the risk they are exposed to with rising interest rates.

Figure 6

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

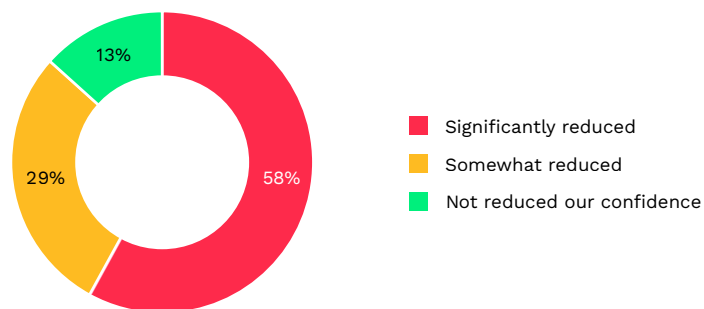


Figure 7

Why have macroeconomics and political tensions impacted your confidence when thinking about the future of your organisation?



Clients no longer feel such a pressure to keep up with competitors in terms of technology; they are now more likely to invest to achieve better data and productivity gains

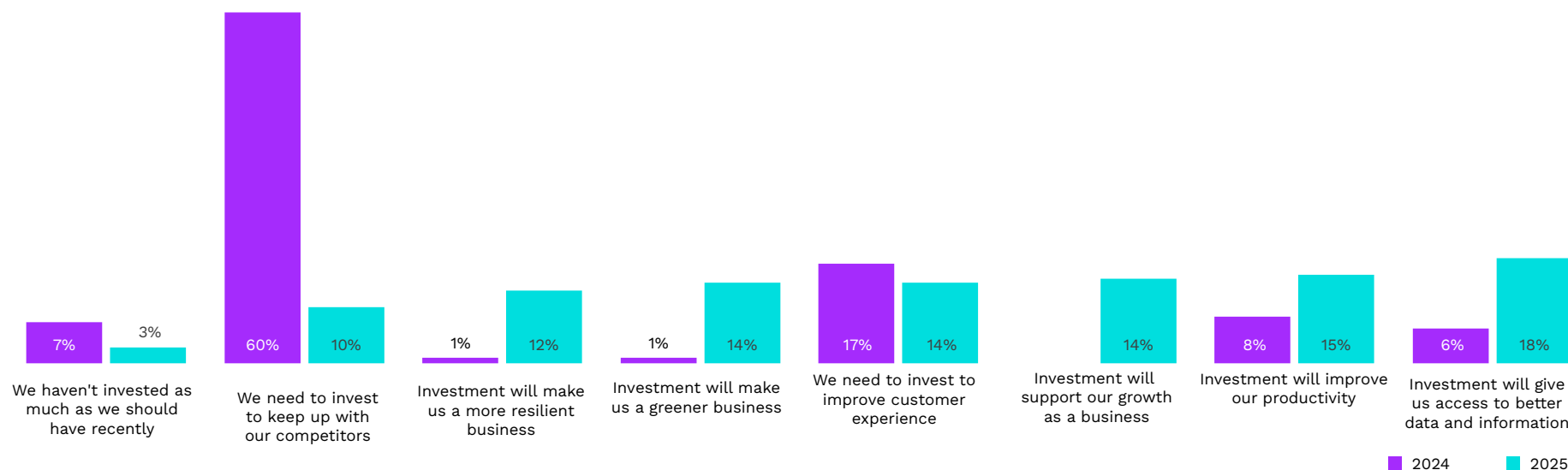
Looking back to the beginning of 2024, clients were most likely to say their technology investment was driven by the need to keep up with competitors. However, in 2025, this was the second least selected answer, only higher than a lack of recent investment.

The reasonably tight range of selected options reflects that clients do not have a clear reason for investing in technology. The most cited driver was the need to gain access to better data and information (18%). This aligns with many clients' intentions to invest in cloud and infrastructure services, which will give them the foundation to improve their data and information and lay the groundwork for future investment in generative AI.

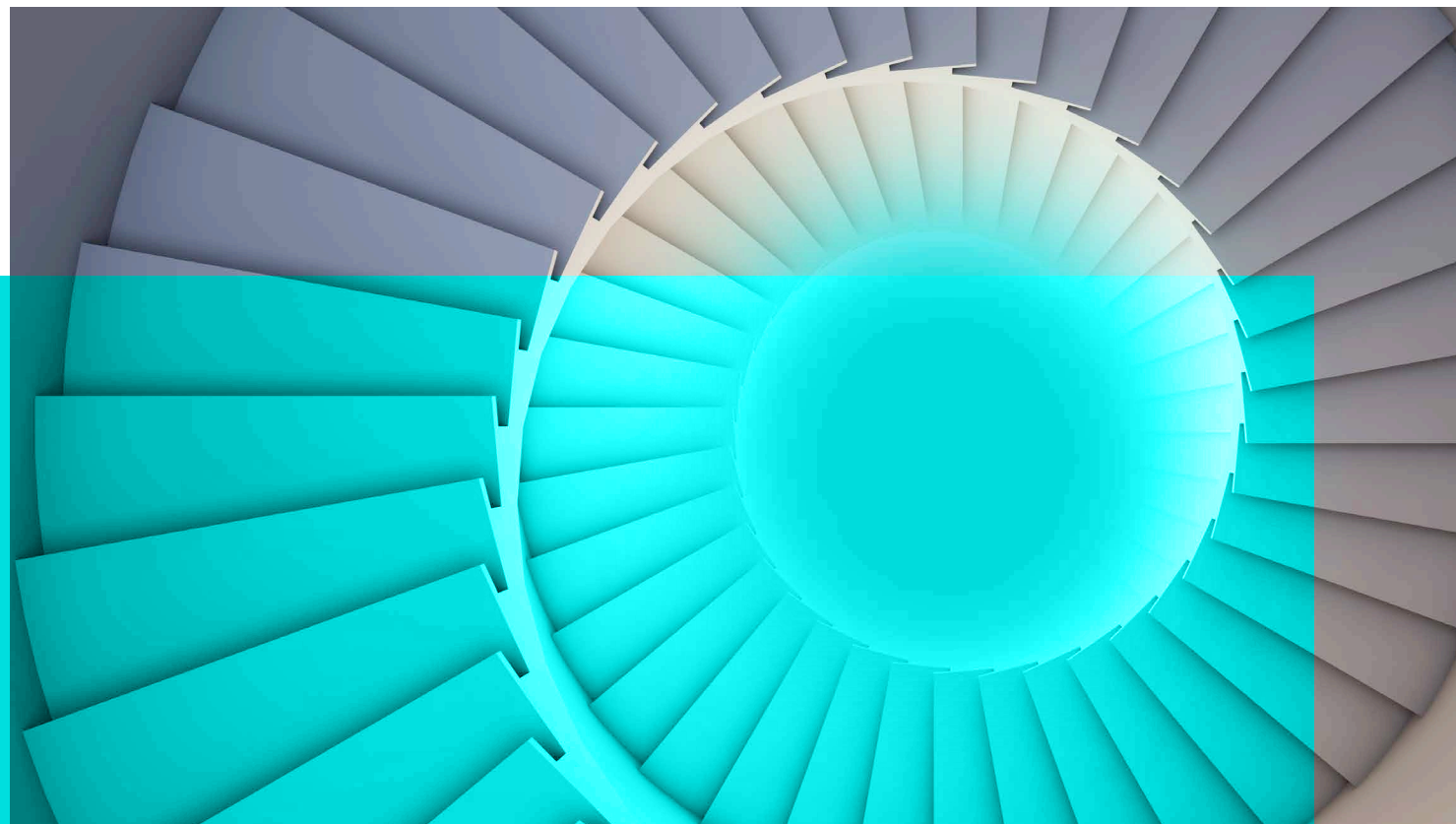
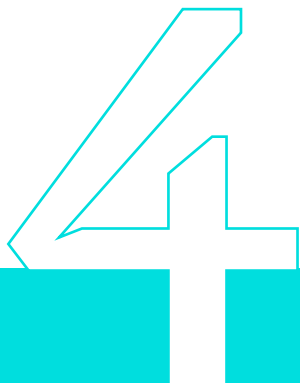
With clients less likely this year to invest in technology out of necessity (in terms of remedying underinvestment or trying to keep up), they are more likely to be looking for value-adding technology that meets a specific need. Without a standout reason for investment, clients will be looking for a clear business case, and firms should bring solutions targeted to their individual technology aims.

Figure 20

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



*Please note that "Investment will support our growth as a business" was not asked about in 2024



“Clients understand the general market will never be stable so they must always be agile and on a journey of transformation.”

Jean-Francois Laget, Argon

Implications for firms

Consulting demand is likely to grow as clients look to fill expertise and capacity gaps.....36

Developing new products, HR operations, and technology implementation are most likely to drive consulting demand..... 37

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“Clients know they do not have any option but to transform themselves because all of their competitors are doing it. With certain issues such as compliance and AI, they have to comply.”

Christophe Desgranges, PwC

Insights from consultants

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6

“There is uncertainty, and companies want to wait and see before investing. In France, the political situation as well as the US election means the situation is very open going into 2025.”

Bernard Drui, Protiviti

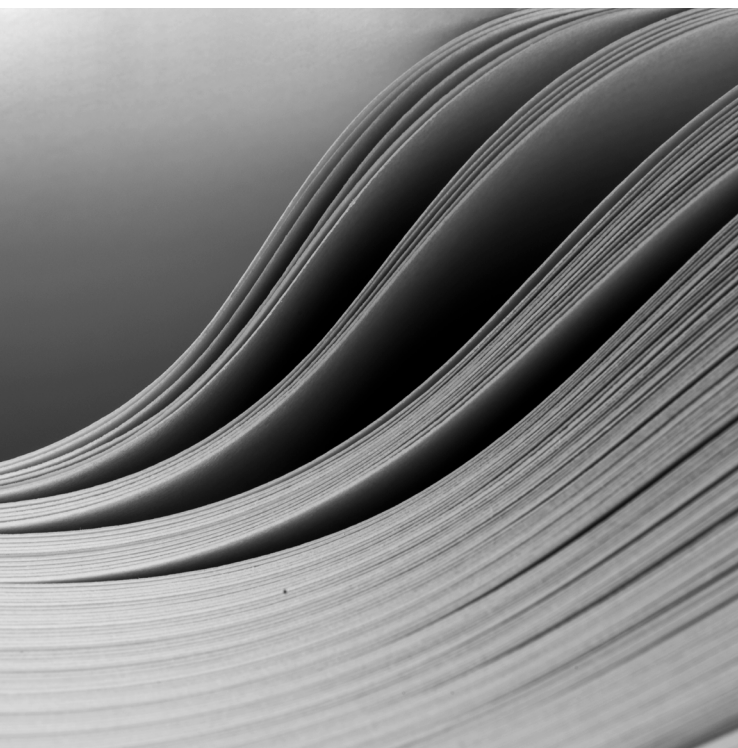
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Our approach to gathering data

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

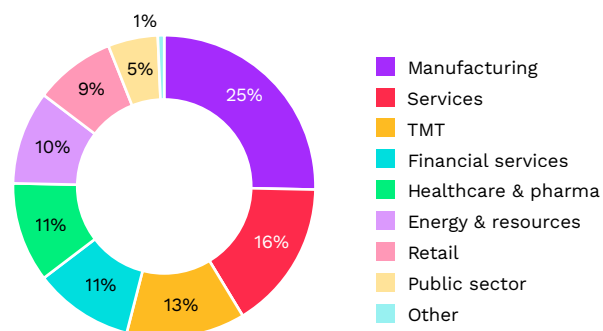
Insights from consultants

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.

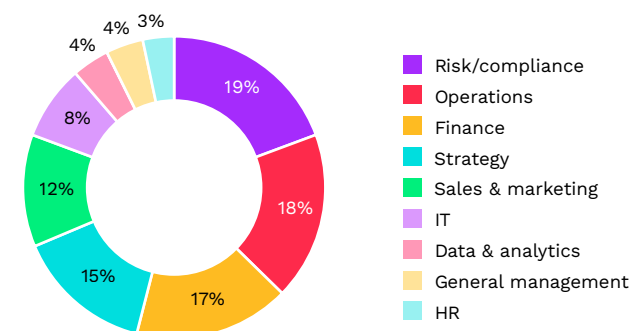
In-depth desk research

We also conducted a thorough PEST analysis in France 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.

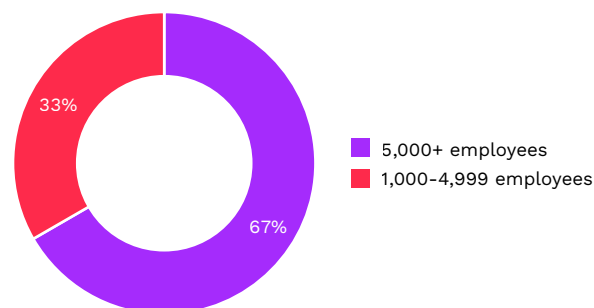
Respondents by sector



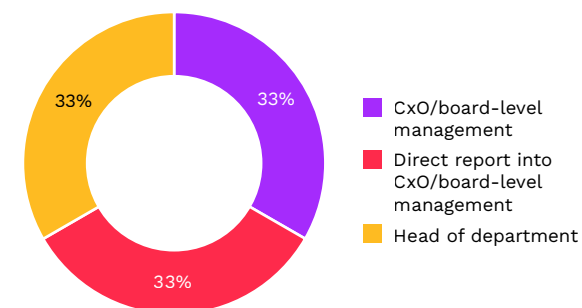
Respondents by function



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
Laurent Choain	Head of Consulting	KPMG France
Hervé de la Chapelle	Managing Partner	EY
Christophe Desgranges	Head of Strategy and Management Consulting	PwC
Bernard Druï	Managing Director	Protiviti
Jean-Francois Laget	Group Managing Director	Argon

Meet the expert

John Bird

John is a seasoned Senior Research Analyst within the Market Trends team, working on a range of regular and bespoke reports. Additionally, John has worked in the research methods team, designing and building some of our surveys and interview guides. He has worked across multiple bespoke projects with some of our leading clients in assisting their global brand studies and marketing strategies.

John Bird

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About us

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

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

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

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

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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	