

EXTRACT



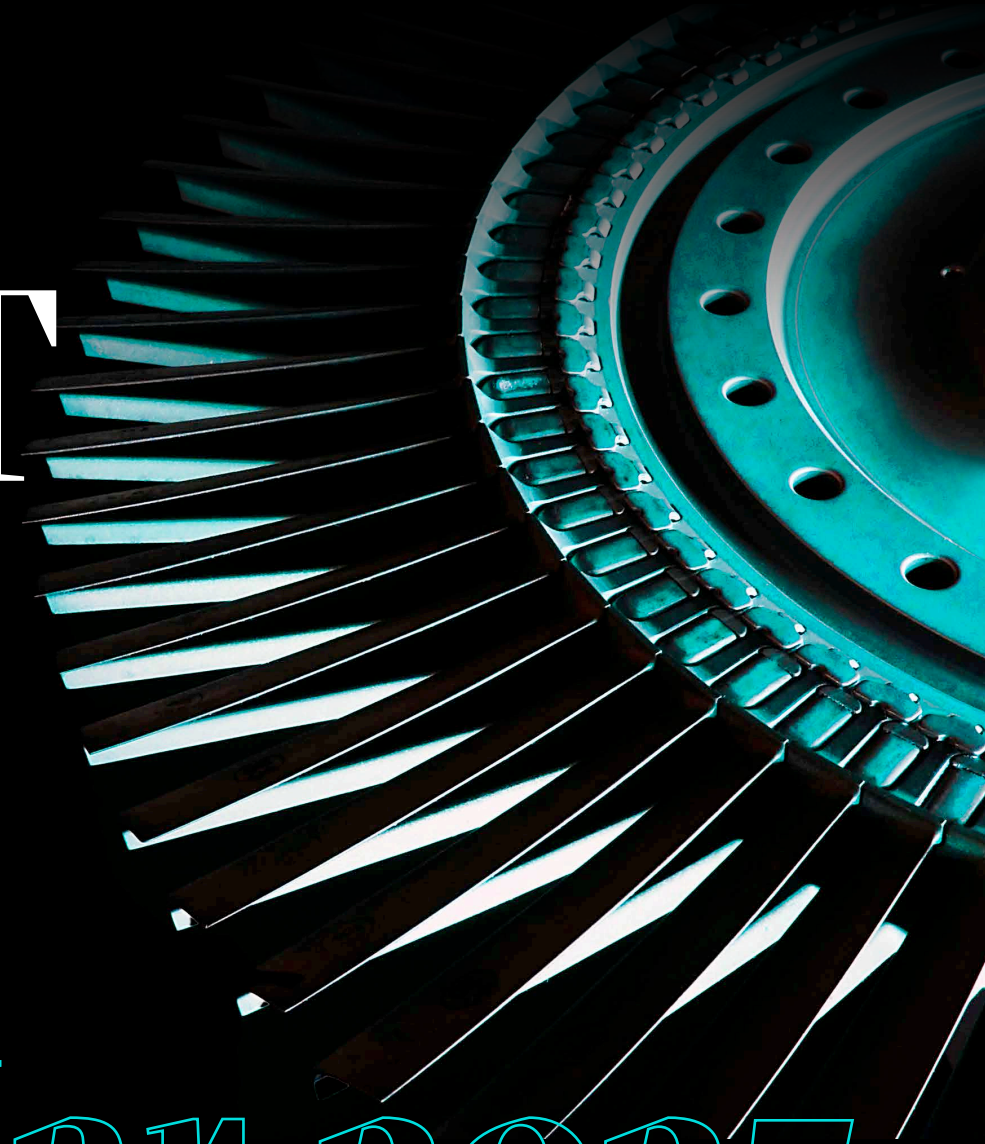
Market Trends

MARKET

The GCC Consulting
Market in 2025

Report

Mar 2025



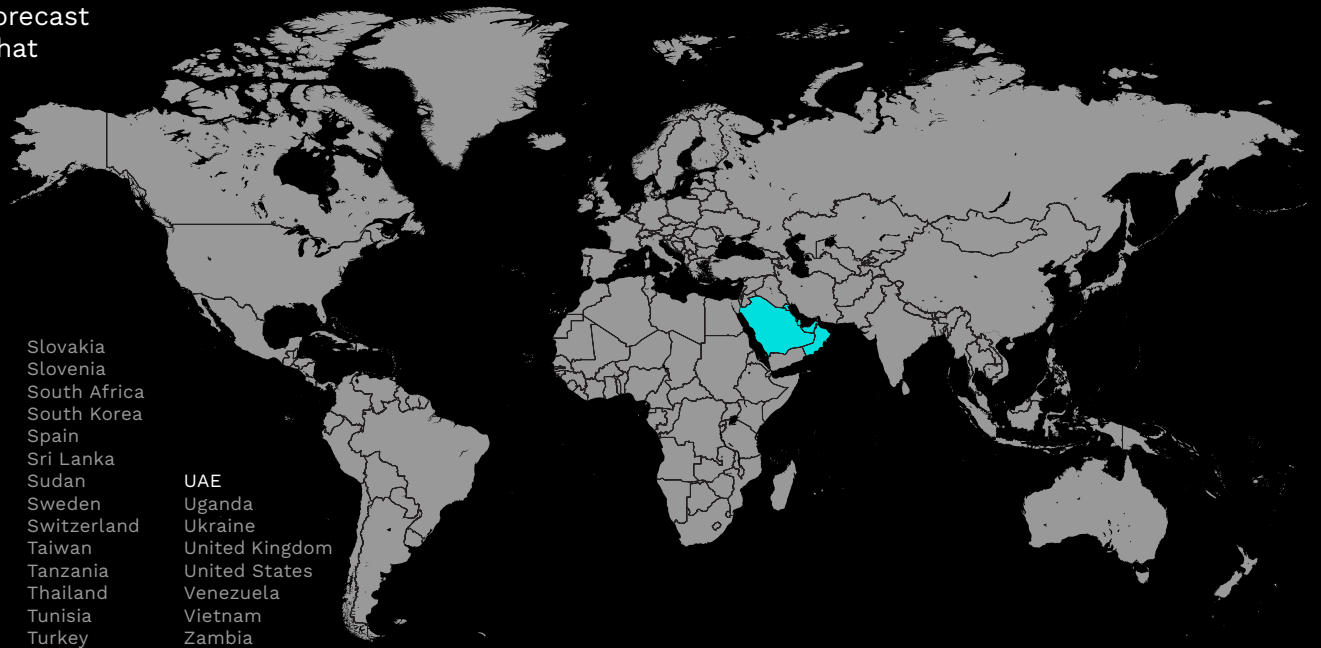
What's included in this report

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

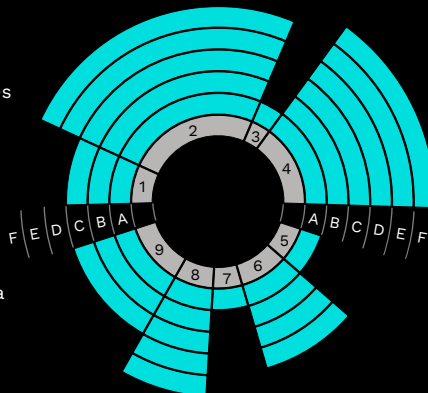
Albania	Chile	Greece	Libya	Pakistan	Slovakia
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia
Angola	Colombia	Hungary	Malaysia	Peru	South Africa
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea
Australia	Croatia	Indonesia	Morocco	Poland	Spain
Austria	Cyprus	Iran	Mozambique	Portugal	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	Rwanda	Taiwan
Brazil	Finland	Japan	North Macedonia	Saudi Arabia	Tanzania
Bulgaria	France	Kenya	Norway	Serbia	Thailand
Cameroon	Germany	Kuwait	Oman	Singapore	Tunisia
Canada	Ghana	Lebanon			Turkey
					UAE
					Uganda
					Ukraine
					United Kingdom
					United States
					Venezuela
					Vietnam
					Zambia



Sector model

Sectors

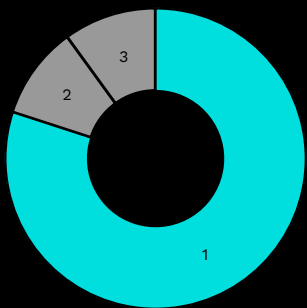
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & life sciences
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



Sub-sectors

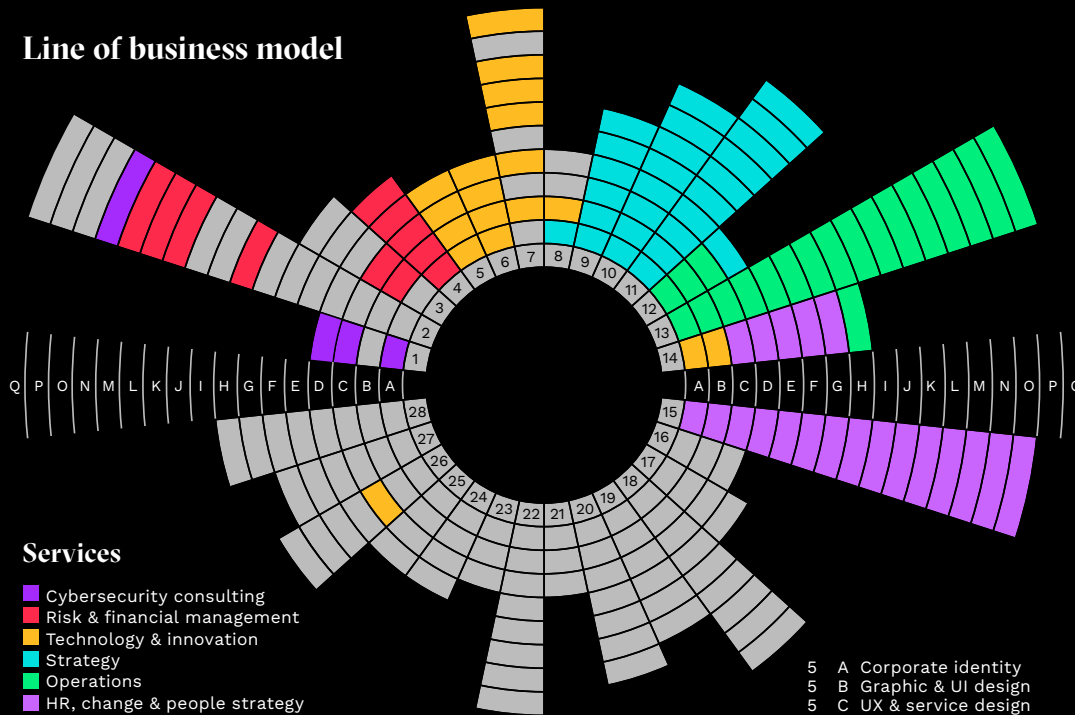
- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 1 A Energy | 4 A Aerospace | 8 A Business services |
| 1 B Primary resources | 4 B Automotive | 8 B Leisure |
| 1 C Utilities | 4 C Construction | 8 C Logistics |
| 2 A Banking | 4 D Consumer electronics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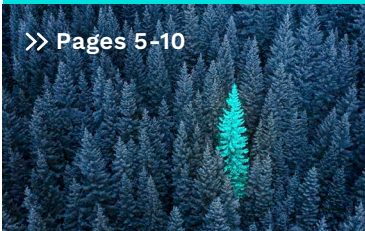
What really matters

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 5-10



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 consulting, we explore the most important priorities, opportunities, and challenges for clients.

>> Pages 18-30

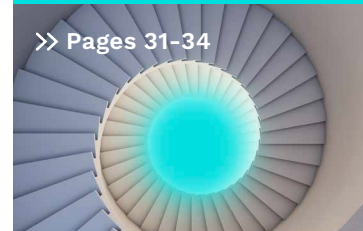


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Implications for firms

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

>> Pages 31-34



5

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



“Clients are starting to look more discerningly at the longevity and resilience of their businesses. They’re thinking about their long-term strategic goals and so are preparing for any potential risks or shocks.”

Dane Albertelli, Source

What really matters

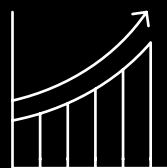
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Three things for a firm to act on

1

The GCC consulting market is still outperforming the rest of the world, with growth of 13.3% in 2024.



The region achieved a double-digit growth rate for the fourth year in a row

Following a strong year of growth in 2023, the GCC continued to be the bright spot for the global consulting market into 2024. The region achieved a double-digit growth rate for the fourth year in a row, which is forecast to continue through to 2025.

To understand the drivers behind these stellar growth rates, we first need to consider the unique circumstances at play in the GCC. The region is trying to transition away from being an oil-dependent economy, and so diversification initiatives are driving consulting demand. In Saudi Arabia, infrastructure projects in preparation for the 2029 Asian Winter Games and the 2034 FIFA World Cup sporting events are gathering pace, and clients need support from consulting firms to help realise their ambitions.

Deadlines for these projects are rapidly approaching, and clients have limited experience in these areas. With internal workforces already stretched, clients are needing results quickly. Productivity improvement is front-of-mind for clients, and skills in technology and digital transformation will be in high demand.

Diversification initiatives will have far-reaching impacts across all sectors in the GCC, so it is essential that consultants have both deep sector expertise and a broad understanding of the wider market to help achieve clients' goals.

2



“I strongly believe that security and privacy consulting will take the front seat, dominated by cybersecurity management and expected surge in demand for cybersecurity managed services (SOCs).”

Sanjeev Agarwal, Protiviti

Market overview

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Consulting market growth was healthy across all sectors in 2024, with energy & resources the top performer	17

3



“There’s more of a reorientation towards very specific outcomes as client focus is more targeted. Spending is more focused, and there are fewer vanity projects.”

Arvind Singhi, KPMG

Client priorities

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Where are clients set to invest?

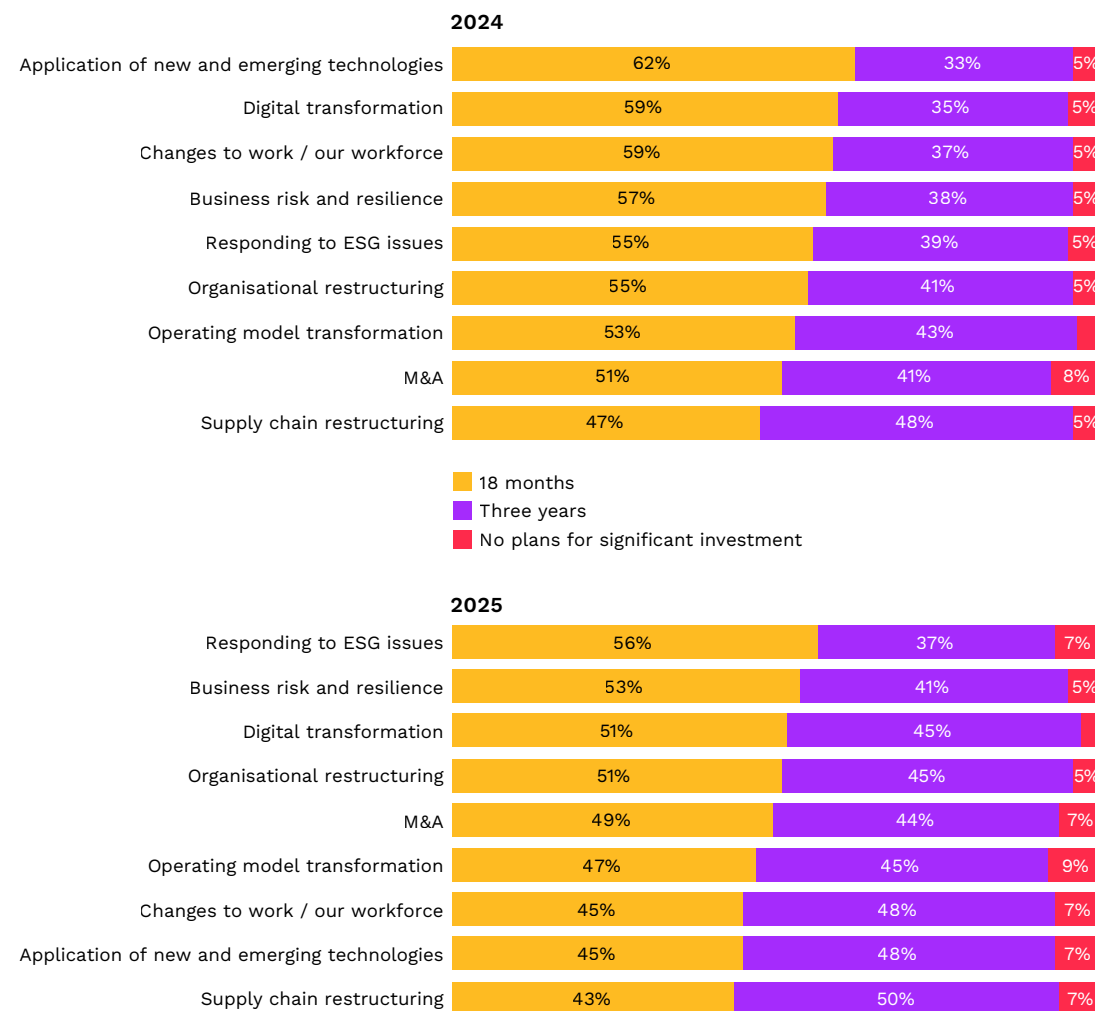
Clients' short-term investment priorities now focus on ESG and resilience, where they are taking a more long-term approach with emerging tech

When looking at investment priorities, 2024 has seen somewhat of a realignment for clients in the GCC. Clients were intensely focused on emerging technologies last year, with 62% of clients wanting to make significant investment in this area in the next 18 months compared to 45% this year. This has instead become a more long-term issue, with the proportion looking at it in the next three years shifting from 33% to 48%. Areas like ESG and building resilience have become the immediate short-term focuses.

This change in priorities is largely down to clients feeling more concerned about the negative macroeconomic environment and taking steps to insulate their companies from any future economic harm. Digital transformation therefore remains high up in the short-term investment agenda, but clients are being more cautious with emerging technologies as the real-world applications are yet to materialise. This does, however, pose an opportunity for consultants: Clients need help understanding the use cases for technologies like AI, and so will be turning to external experts.

Figure 14

Where is your organisation planning to make significant investment in the next 18 months and three years, 2024 vs. 2025



Technology investment remains strong, with clients hoping it will unlock more useful data to help their businesses

One thing that remains consistent from last year is the region's commitment to high levels of spending in digital technology. Spend in this area saw yet another boost in 2024, with 49% of clients reporting that they had considerably increased their digital technology investment in the last year. Although large projects are being reorganised, the actual scale of investment is not showing any sign of a slowdown. Spending is only set to increase in the coming year, with 59% of clients saying investment in digital technology will considerably increase in the next 18 months.

Clients attribute this high level of investment to the need to unlock new insights by improving their data and information infrastructure. As we discussed earlier, clients are looking to protect themselves from the harsh global economic environment, and so it stands to reason that clients are also largely investing in data to make better business decisions that will build resilience. Clients are also becoming aware that in order to get the most out of AI, a robust foundation of data is needed. They are therefore investing in their data now to be able to support their future AI goals.

Figure 17

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

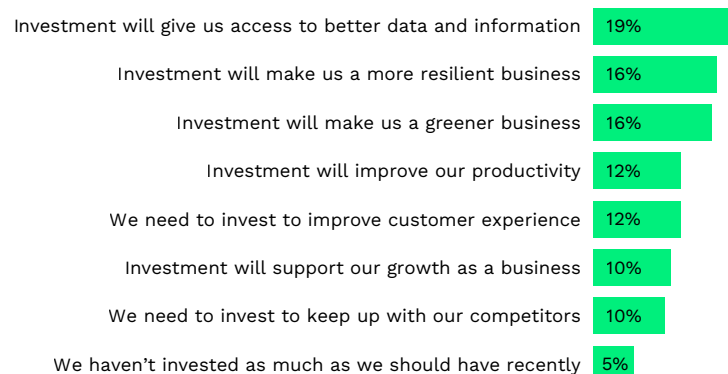
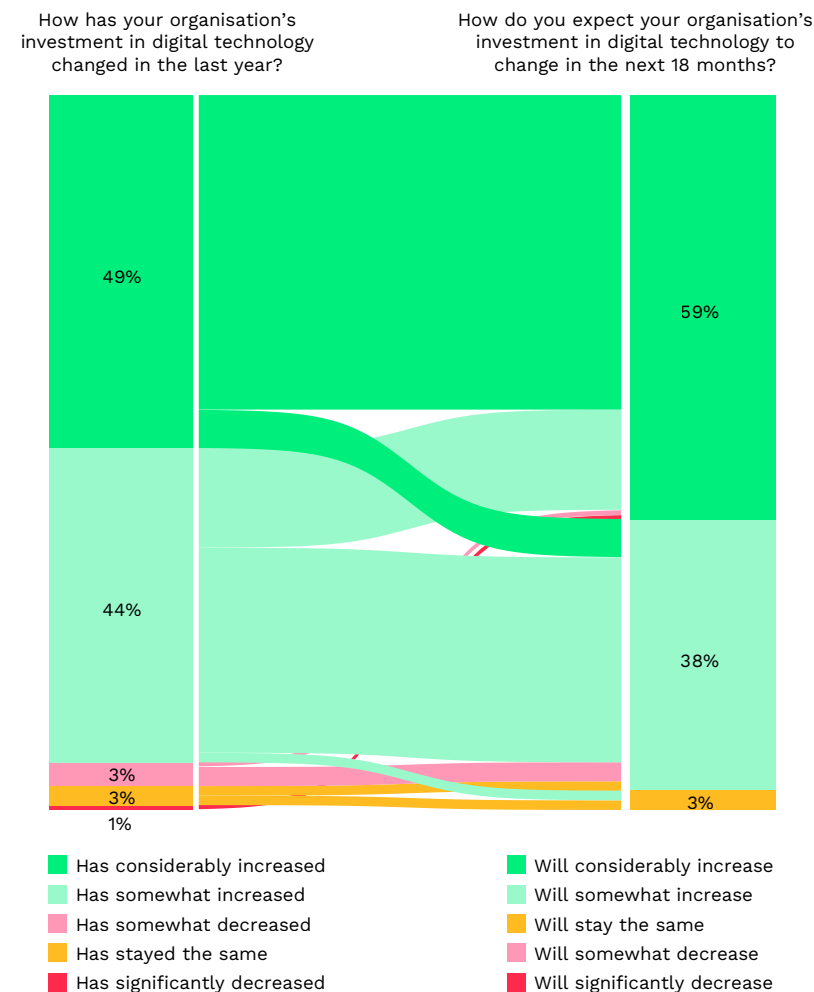


Figure 16

How organisations' investment in digital technology has changed in the last year compared to expectations about the next 18 months



4

“The only way to get to premium pricing in the region is if you have deep sector expertise, supported by AI and tech capabilities and the ability to implement in the local market.”

Stephen Anderson, PwC

Implications for firms

Clients are dealing with new issues and tighter deadlines—and are likely to turn to consultants for support32

Strategy firms and the Big Four will likely see a spike in demand in the coming year33

The most senior buyers of consulting services are increasingly looking at firms’ marketing materials to help them make their buying decisions 34

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Insights from consultants

“There’s a clear focus on giving more business to homegrown [firms], which most often have Saudi Arabian roots and connections with industries or government.”

Rafael Lemaitre, Sia Partners

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Islam Al Bayaa, Head of Advisory, Middle East, South Asia, Caucasus and Central Asia (MESAC) Region and Arvind Singhi, Partner, Head of Clients & Markets Middle East, South Asia, Caucasus and Central Asia (MESAC) Region, KPMG.....	37
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6

“It has been another positive year, but not without its difficulties, such as geopolitical and macroeconomic tensions. These created a little instability, but this has not materially impacted the scale of opportunity and work.”

Jonathan Holmes, Korn Ferry

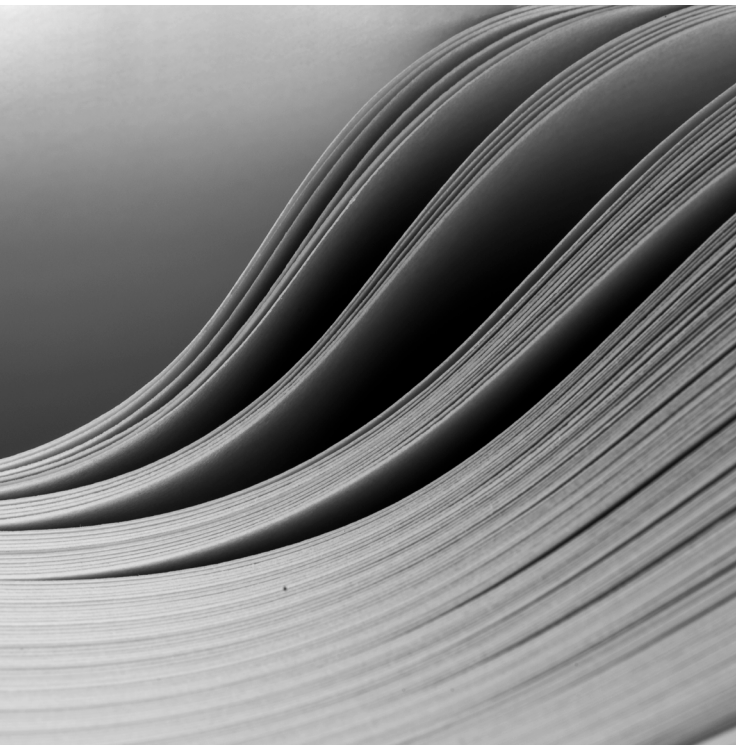
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Our approach to gathering data

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 = £0.78

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

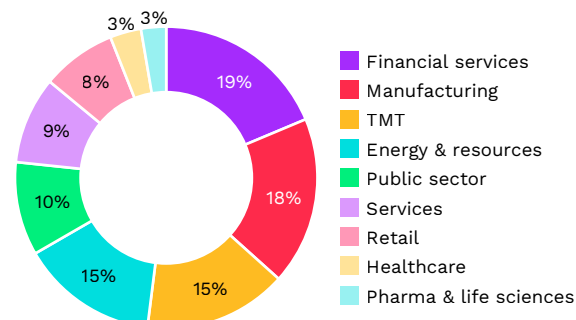
Insights from consultants

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.

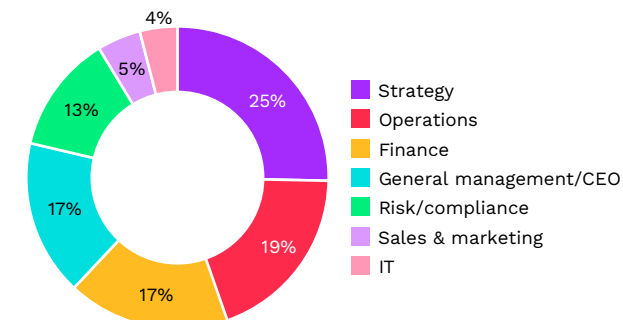
In-depth desk research

We also conducted a thorough PEST analysis in the GCC 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.

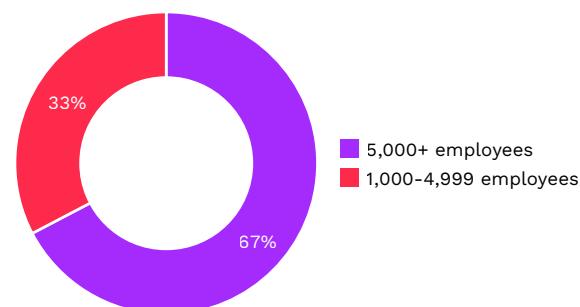
Respondents by sector



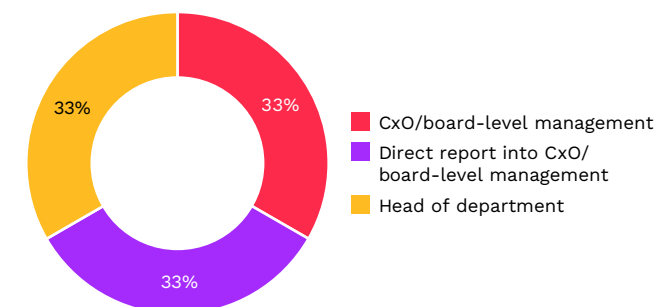
Respondents by function



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, Program 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
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Stephen Anderson	Partner, Middle East Clients and Markets Leader	PwC
Jonathan Holmes	Managing Director & Regional Chairman Middle East, Africa & Turkey	Korn Ferry
Rafael Lemaitre	Partner	Sia Partners
Arvind Singhi	Partner, Head of Clients & Markets Middle East, South Asia, Caucasus and Central Asia (MESAC) Region	KPMG

Meet the expert

Dane Albertelli

Dane is a Senior Research Analyst within the Market Trends team. He currently conducts research on global market trends within the professional services sector. He has also carried out bespoke mergers & acquisitions scans for clients hoping to enter the US IT services sector. He has written a number of specialised reports on the state of the professional services market in regions such as GCC and Australia.

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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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