



asociación española
de empresas de consultoría

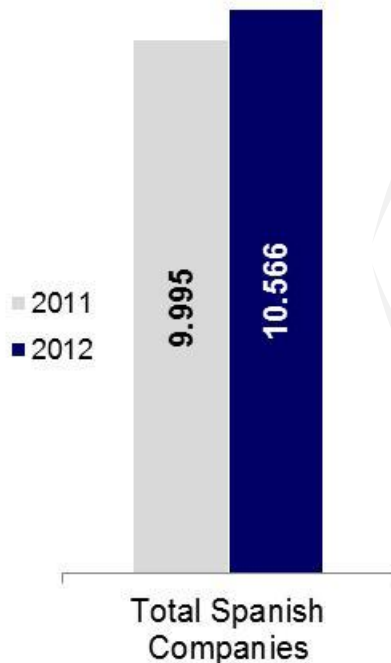
The background of the slide is a blurred photograph of a meeting. Two people are seated at a long white table, each with a laptop and a pen, appearing to be in a professional discussion. The setting is bright, with a view of a city and greenery in the background.

Management Consulting

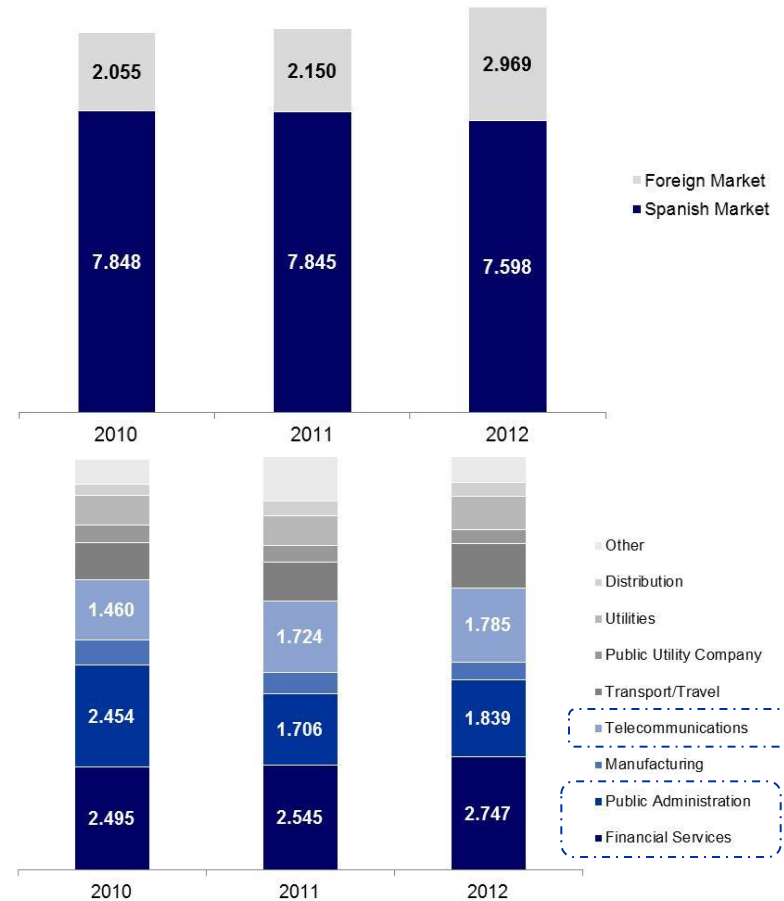
Spanish consulting firms' turnover increased by 5.7% in 2012, reaching € 10.556 M.

Total turnover
(€ million)

5.7%

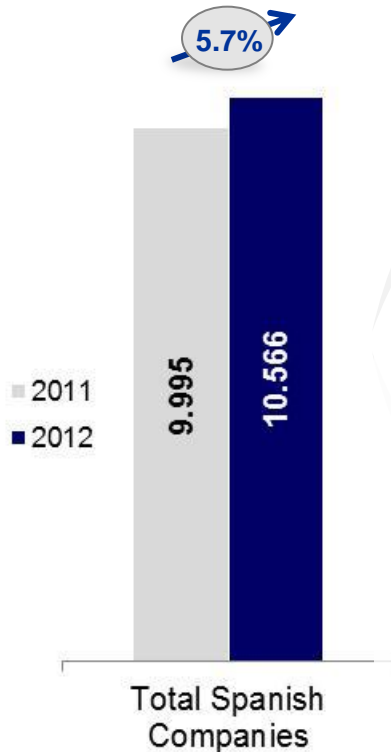


Turnover per market
(€ million)

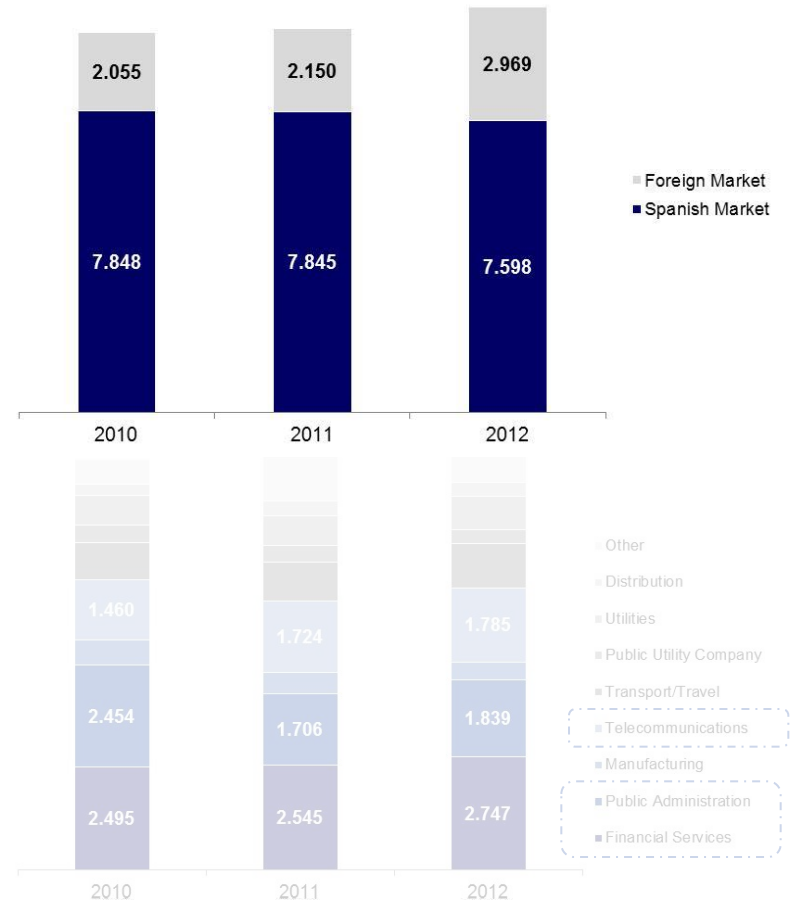


Turnover in Spanish market decreased 3.2%, meanwhile on foreign markets increased 38.1%

Total turnover
(€ million)



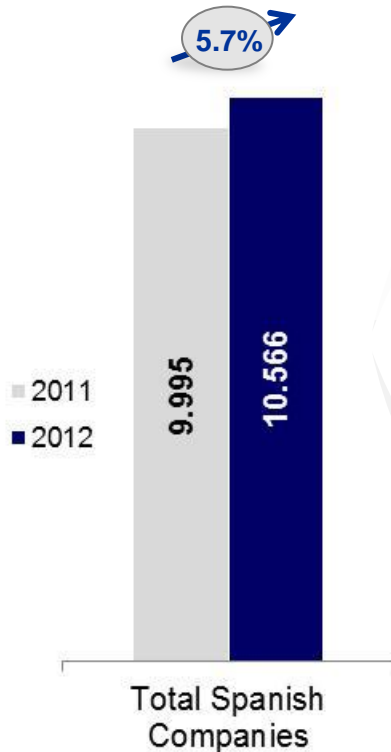
Turnover per market
(€ million)



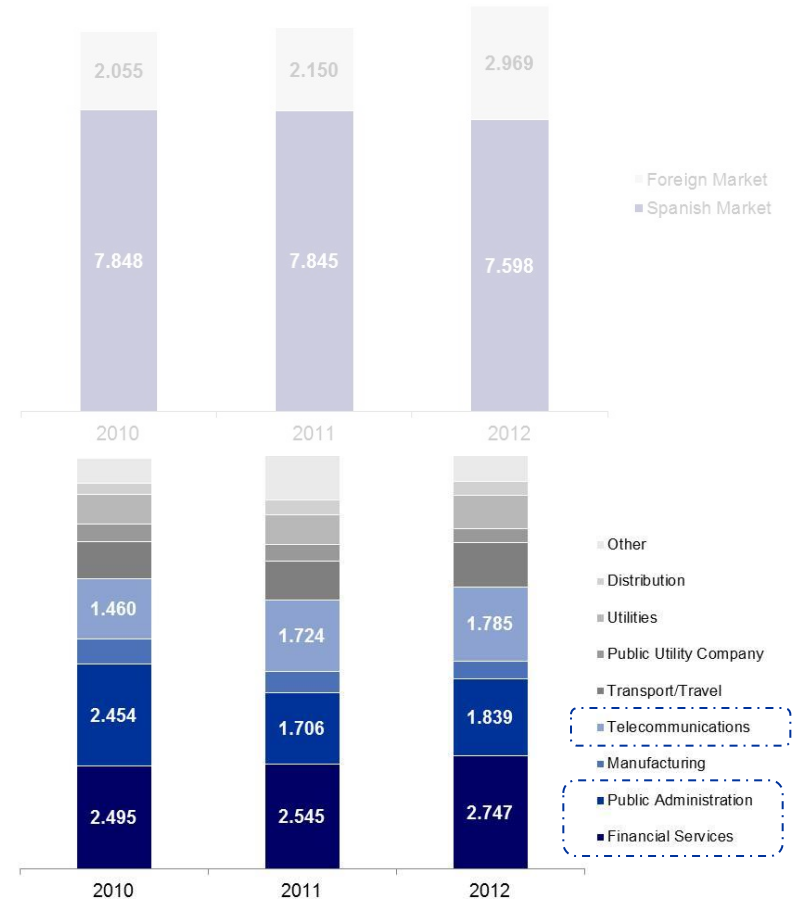
Turnover per sector
(€ million)

Sectors that represent the highest market share in 2012 are Financial Services (26%), Public Administration (17.4%) and Telecom (16.9%)

Total turnover
(€ million)

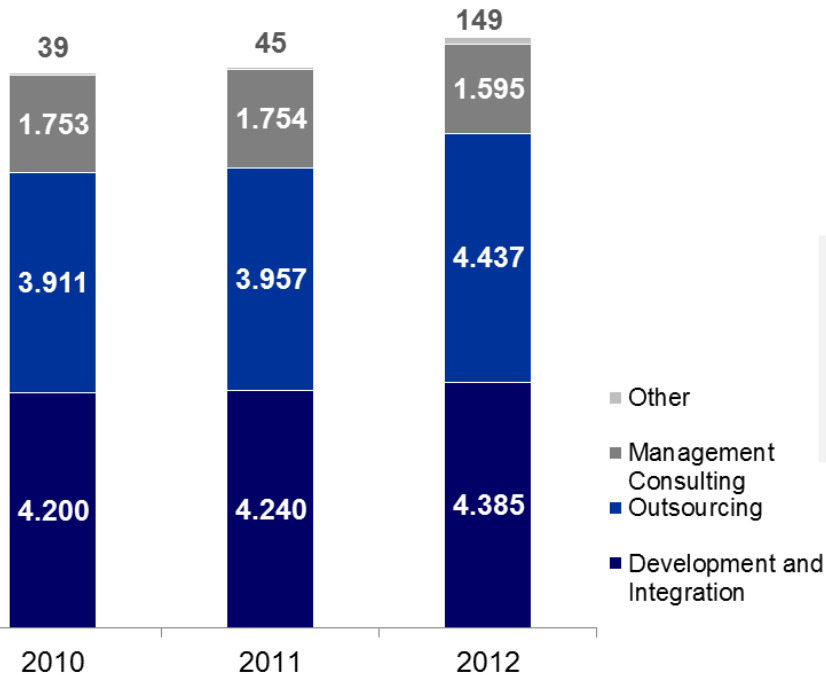


Turnover per market
(€ million)

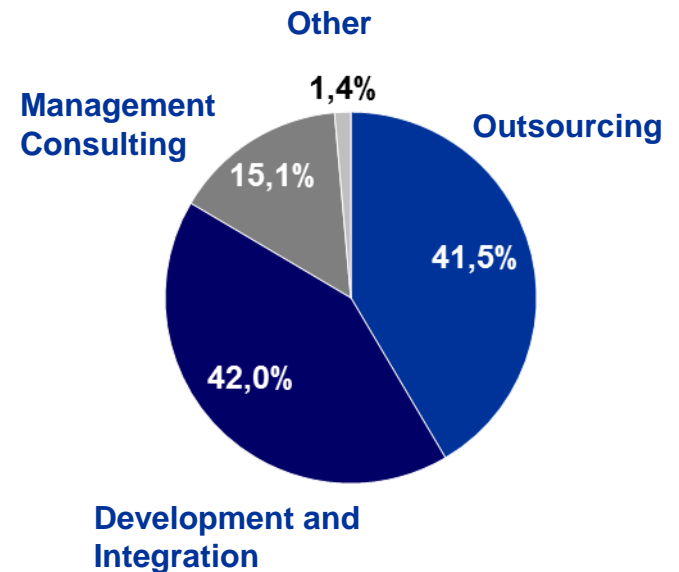


Management Consulting reduced its turnover in 2012 despite Development & Integration and Outsourcing increased representing more than 80% of the market share

Turnover per service
(€ million)



Turnover per service
(percentage)



Despite the global macroeconomic crisis, the consultancy sector in Spain has maintained growth in turnover, mainly by three factors:

competitive pressure

growing power of the consumer

increased activity of investors: private equity funds, which are emerging as industrial conglomerates

rapid spread of IT technologies

internationalization and globalization

emergence of more

flexible and

'fragmented' business models

1

Internationalization of Spanish companies in LATAM due to the ease of access (language)

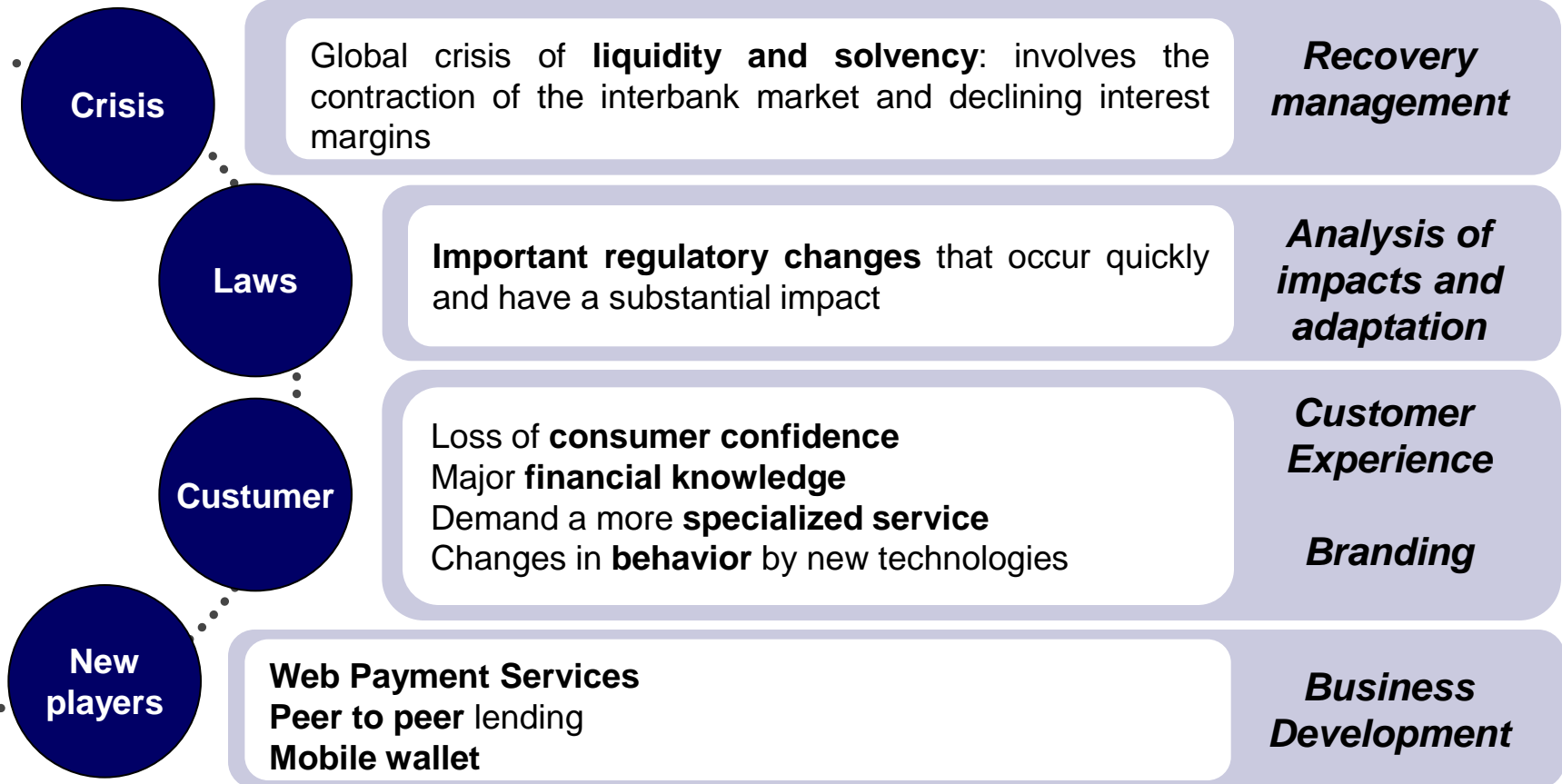
2

Impulse of the **transformation process** in private companies and Public Administration

3

Adaptation of **services portfolio** to the needs of companies and the market

This transformation process affects particularly the financial sector, causing a high demand for professional services:



The main projects developed by Management Consulting over the past year have been based on the advice and support on:

Internationalization,
sought new business
opportunities

***Restructuring and
transformation,*** especially
in the banking sector

Improving
competitiveness, saving
costs, optimizing processes and
driving strategy to IT reality

- **Strategy.** Major opportunities for growth for consulting firms which: concerns consulting firms moving away from the old pyramid consulting model in favor of something more flexible and offering integral services  *new services, new roles, and new delivery models*
- **Right here, right now.** Recent low levels of growth EU and main sources expects more of the same across the European consulting industry  *one must: internationalization*
- **HotSpots.** First, Saudi Arabia, Qatar, ..., and later on China, Brazil, and continue to fuel a booming market.  *flexibility in a global market context*
- **Continuous merger and acquisitions** in global consulting firms may hold potential for consulting firms.  *further consolidation and client perception*