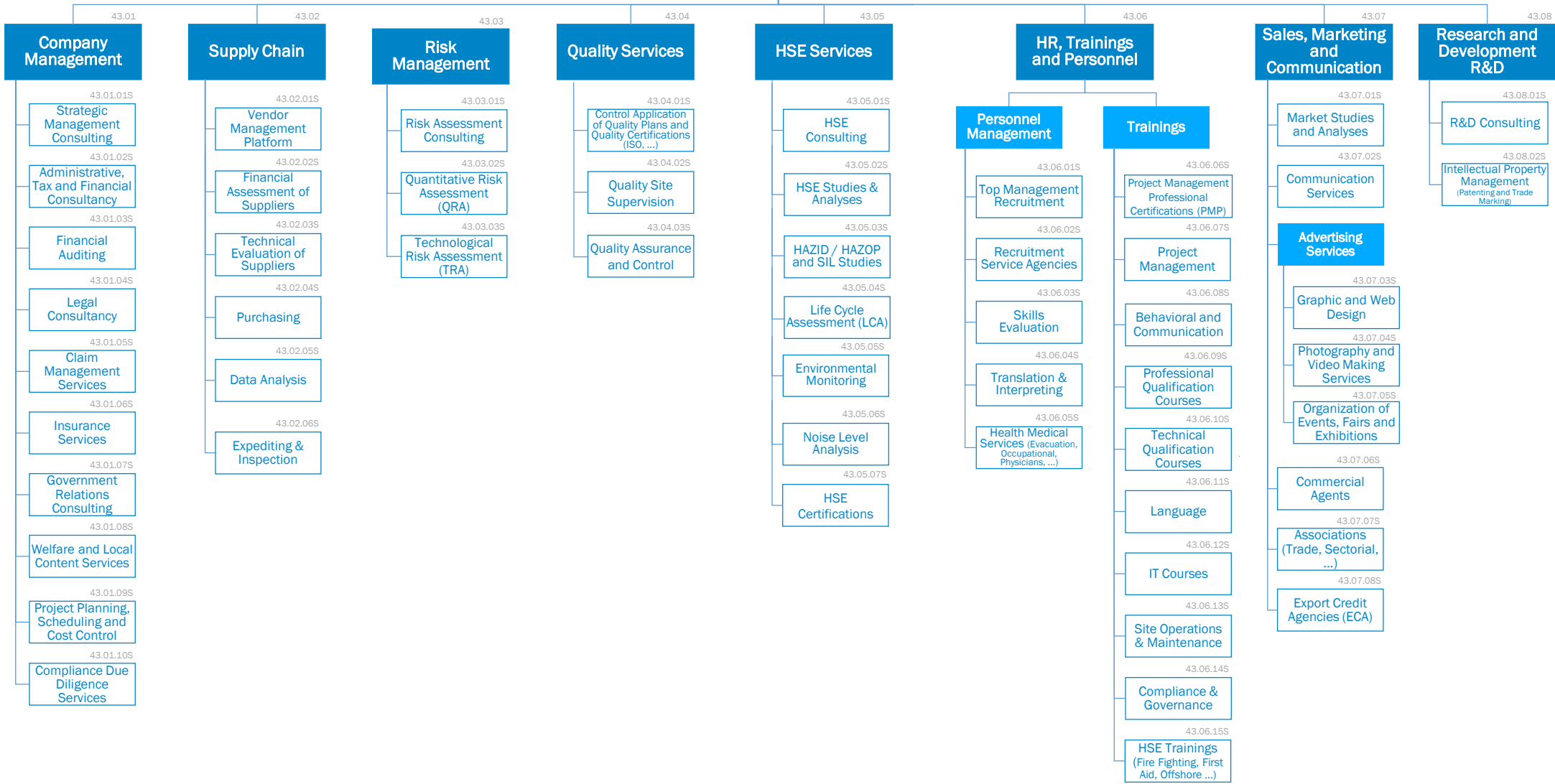


Professional Services



Professional Services

Broadly speaking, Professional Services are services that are typically outsourced and require a specific professional qualification. In this context, Professional Services refer particularly to those services that are commonly procured by industrial Buyers, excluding Engineering Services, IT Services, services that are more closely connected to the company's daily operations (e.g. Maintenance) and other "General Services" that are included in other Groups of Categories.

Therefore, the Families included in this Group go from the typical "corporate" services (Strategy Consulting, Communication Consulting, etc.) to services that are more specific for the businesses of industrial Buyers' (Project Quality Control, Safety Studies, ...).

MAIN RATIONALES BEHIND THE STANDARD CATEGORIZATION

Company Management Services

- This Family includes all the consulting services related to the administration and management of a company.
- Some categories are typically issued by authorized / certified entities (e.g. legal consulting, tax consulting, ...), while others are usually issued by companies that are accredited by their "brand equity" (e.g. Management, Strategy and Organizational Consulting).
- The "Strategic Management Consulting" category includes a broad range of consulting services, from organizational, to governance, to more typical "strategic" topics.
- Project Planning, Scheduling and Cost Control are sometimes delivered by the same players, but they require different competences and have therefore been separated in three categories.

Supply Chain Services

- This family covers the entire range of procurement service providers, from specialist consultancy companies, (e.g. Data Analysis, Procurement and Contracting Consulting, ...), to the outsourcing of specific parts of the procurement process (Inspection, Purchasing, Project Planning, ...) to information providing services (Commercial Information and Financial Assessment of Suppliers, ...).
 - Inspections require a high level of trust and reliability of the inspector, which is usually guaranteed by the international brand of the vendor (this category is dominated by few large players).
 - Vendor Management Platforms and Data Analysis are usually delivered by focused organizations, sometimes specialized in a single industry (e.g. Oil&Gas). These companies may sometimes also deliver Consulting Services related to procurement.
 - "Financial Assessment of Suppliers" was listed under "Procurement Services" even if its suppliers are usually specialized and different from the ones that provide other categories in this family (e.g. Bureau van Dijk, Dun & Bradstreet, ...). This was done in respect of its "business proximity".

Quality and HSE Services

- The HSE Studies node includes assessments, consulting, certifications and studies related to Health, Safety and the Environment
 - HAZID / HAZOP and SIL Studies: studies that aim at identifying potential safety risks to personnel and equipment (in particular, Hazard Identification, Hazard and Operability and Safety Integrity Level)
 - Reliability is defined as the probability for a system to perform its function without failures, while Availability is the probability for the system to "ready to use" (given that it is not failed or under maintenance)
 - Generic plant safety studies were differentiated from the risk assessments for personal protection
- Specific attention was dedicated to Maritime Technical Services, which are often delivered by focused actors (even though very large inspection players deliver both maritime and other types of inspections)
- The Quality related categories can refer either to the quality management system of a company as well as quality control on a specific project.

HR, Trainings and Personnel Services

- This Family includes Personnel Management Services and Trainings as two main "nodes".
 - Personnel Management Services are classified by the type of service offered, rather than the type of personnel it is offered to.
 - Trainings are classified by the type of skill they aim to develop:
 - Professional Qualification: typical skills for corporate / staff functions (Languages, IT, Marketing, ...)

- HSE: includes mostly safety trainings for site operations (Fire Fighting, First Aid, ...)
- Professional Qualification Courses includes: Business and Marketing, Legal, Procurement & Logistics, IT and R&D.

Sales, Marketing and Communication Services

- Marketing, Sales and Communication include all services related to sales and marketing, but also more broadly those related to managing the spread of the company information towards the public (PR agencies, ...).
 - The first categories of this family (43.05.01S and 43.05.02S) are related to the collection of information and the definition of a marketing strategy.
 - The following three (43.05.03S to 43.05.05S) to advertising services and to the definition of a corporate identity.

R&D Services

- R&D Consulting includes both companies that redesign the R&D process, as well as organizations to which a part of the R&D process can be outsourced.