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TRANSFORMATION OF THE CONSULTING SERVICES MARKET IN UKRAINE UNDER THE INFLUENCE OF MILITARY CONFLICT

Abstract. *T*he study examines the transformation of Ukraine's consulting services market under the influence of military conflict. It analyzes external and internal factors affecting the market's development during wartime and presents key statistical indicators of the consulting sector. The full-scale war has caused a sharp contraction in demand for consulting services in traditional segments as business activity was disrupted, while simultaneously stimulating new demand for crisis management, digital transformation, and risk management advisory. We assess the business environment's response to instability: companies have been leveraging financial reserves, cutting costs, and revising management strategies to survive. Special attention is given to changes in the demand and supply for consulting services amid the conflict: the study identifies which market segments suffered the most and how client needs have shifted, with new requirements emerging due to elevated wartime risks. Our analysis finds that the war has heightened the need for consulting support in areas such as business relocation, supply chain reconfiguration, cybersecurity, and post-war recovery planning. The size and structure of the consulting market are examined based on statistical data and industry reports, revealing that the Ukrainian consulting industry, which was historically underdeveloped, faced severe setbacks but also accelerated changes. We identify current development trends and key factors affecting market performance during the war. Based on the findings, we propose strategic recommendations for strengthening the consulting sector and provide a forecast for its post-war development. The conclusions offer valuable insights for consulting professionals, business leaders, and government agencies involved in regulating or supporting the consulting services industry in Ukraine.

Keywords: C*onsulting Services Market; Military Conflict; Supply and Demand; Post-War Reconstruction.*

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Introduction. The consulting services market plays an important role in developing economies by providing businesses with expert support to adapt to change (Werr, 2003; Sturdy, 2011). Before the full-scale invasion, the Ukrainian consulting sector was small and fragmented (Opatska, Grynko, & Ivashchenko, 2024). According to the European Association of Consultants, consulting typically accounts for about 1% of a country's GDP, while in Ukraine this figure was only ≈0.4% before the war. This indicated potential for growth under stable conditions. The global consulting services market grew by approximately 10% annually in the second half of the 2010s (Cerruti, Tavoletti, & Grieco, 2019; Vial, 2019). However, economic crises – such as the COVID-19 pandemic – had already

Table 1. Macro indicators relevant to consulting demand (Ukraine)

Indicator	2022	2023	2024	2025e
Real GDP growth (%)	-29	5.3	3.5	2.0
RDNA3 total needs (US$ bn, 10-yr)	0	0	486	486
EBRD financing (€ bn)	1.7	2.1	2.4	2.0
Prozorro competitive procurement (UAH bn)	0	616.8	841.0	860.0

Source: constructed by the author based on data World Bank (RDNA3)[1]*; EBRD (2025)[2]*; Prozorro (2025-03-27)[3]*; Derzhstat[4]*

1* European Union; Nations, United; Ukraine, Government of; World Bank. Ukraine - Third Rapid Damage and Needs Assessment (RDNA3) : February 2022 - December 2023 (English). Washington, D.C. : World Bank Group. URL: http://documents.worldbank.org/curated/en/099021324115085807 (дата звернення: 27.04.2025)

2* The war on Ukraine. EBRD. URL: https://www.ebrd.com/home/what-we-do/focus-areas/war-on-Ukraine.html (дата звернення: 27.04.2025).

3* Open tenders online. URL: https://www.dzo.com.ua/en (дата звернення: 27.04.2025).

4* Quarterly national accounts. State Statistics Service of Ukraine. URL: https://www.ukrstat.gov.ua/ (дата звернення: 27.04.2025).

sparked interest in digital solutions and anti-crisis consulting by 2020 (Vial, 2019). The Ukrainian government, for example, engaged international consulting firms (KPMG) to carry out large-scale reforms.

Since 24 February 2022, conditions have changed radically: Ukraine's GDP has fallen by almost 45% (World Bank estimate) (Filyuk & Prytula, 2024), and more than half of businesses have suspended operations. In such conditions, the demand for traditional "growth and strategy" consulting has fallen sharply, while the need for advice on crisis management, business continuity and transition to an online environment has grown significantly (Filyuk & Prytula, 2024; Wenzel et al., 2021). Therefore, the aim of this study is to analyse the transformation of supply and demand for consulting services in Ukraine in the context of war and to identify new trends and challenges that have emerged. The consulting services market plays a crucial role in modern economies by providing expert advice to help businesses adapt to changing conditions. In Ukraine, this market has historically been relatively small and fragmented, reflecting the country's economic transitions. Before the current conflict, the Ukrainian consulting industry was considered immature and institutionally vulnerable[1].

Consulting services in Ukraine accounted for only about 0.4% of GDP – roughly two and a half times lower than the typical 1% of GDP seen in European economies[2] – indicating significant potential for growth in more stable times. The average global consulting market had been growing around 10% annually in the latter half of the 2010s[3], and Ukraine was beginning to experience increasing demand for professional advisory services as more companies recognized the value of external expertise. Notably, the market's development prior to 2022 was influenced by factors such as the COVID-19 pandemic, which spurred interest in digital and HR consulting solutions[4]. Major international consulting firms and local players were active in Ukraine's market; for example, the government engaged top consultancies like KPMG for large privatization projects[5], underscoring the presence of consulting support in economic reforms. However, the outbreak of a full-scale war in 2022 introduced unprecedented disruption to this emerging market, forcing a profound transformation of the consulting services landscape.

This article explores how the military conflict has impacted the consulting services market in Ukraine and how the industry has been transforming in response. We examine the extent to which the war has altered demand for consulting, changed the supply (availability and capacity of consulting firms),

1 Consulting Industry in Europe in the Aftermath of the War in Ukraine. URL: https://consultingquest.com/insights/consulting-industry-in-europe/ (дата звернення: 27.04.2025).

2 Marsh McLennan. (2024, January 17). Marsh McLennan helping Ukraine with public-private transformation. URL: Consultancy.eu News. (дата звернення: 27.04.2025).

3 Consulting Industry. URL: https://www.consultancy.uk/consulting-industry (дата звернення: 27.04.2025).

4 EY & AmCham Ukraine. (2023, June 23). Doing Business after 15 Months of Full-Scale War in Ukraine – Survey Results. Press Release.

5 Ukraine's government selects KPMG for large privatisation project URL: https://www.consultancy.eu/news/5152/ukraines-government-selects-kpmg-for-large-privatisation-project (дата звернення: 27.04.2025).

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Table 2. Consulting / Professional Services Market in Ukraine (Selected Years)

Year	Market / Segment	Approximate Size / Change	Notes / Source
2019	Total consulting market	UAH 19,327.75 million (~0.5% of GDP)	Estimate for consulting services in Ukraine in 2019.
2022	Consulting market	~ €53,620,000 (decline of ~10% vs 2021)	The market size in 2022 was ~ 53.62 million EUR; decline relative to 2021 due to war.
2023-2024	Management consulting market — analysis & outlook	Report prepared by IMC — detailed analysis for 2023–2024 (no specific number found)	IMC (Institute of Management Consulting, KNEU) completed research on consulting market development in 2023-2024. (mci.kneu.edu.ua)
2025	IT Consulting & Implementation (Ukraine)	Projected revenue ~ US$204.26 million	Statista forecast for 2025. (statista.com)

and reshaped the market structure. The study draws on statistical data, industry reports, and recent research to analyze key market indicators under wartime conditions[1]. It also considers the strategic responses of consulting firms and their business clients facing instability. By identifying the challenges and adaptive strategies in the consulting sector, we aim to provide insights into the market's resilience and its prospects for recovery. The findings contribute to understanding how consulting services can remain relevant and valuable during extreme disruptions, and what role they might play in Ukraine's eventual economic reconstruction. The results are intended to inform consultants, business leaders, and policymakers on effective approaches to sustain and develop the consulting services market during and after the conflict.

To achieve this goal, the following tasks have been set: (1) to assess how the impact of the war has changed demand in various consulting segments; (2) to study the response and adaptation of consulting companies to the new conditions; (3) to identify the key factors influencing the recovery of the industry in the post-war period. The object of the study is the consulting services market in Ukraine, and the subject is the process of its transformation under the influence of the military conflict.

Literature Review.

Pre-war Development of the Consulting Market in Ukraine: Academic and industry analyses prior to the war depicted Ukraine's consulting market as underdeveloped but evolving. Yevtushenko and Halimon (2021) characterized the domestic consulting industry as immature and unstable, citing its susceptibility to economic crises and institutional weaknesses (Werr, 2003). Demand for consulting services in Ukraine had been inconsistent, partly due to limited awareness among businesses of the benefits of external advice and partly due to economic volatility.

Following the knowledge-system view of consulting (Werr, 2003), large consultancies operate as knowledge systems that combine codified tools/methods, project repositories, and consultants' tacit know-how; performance depends on how well firms create, codify, transfer, and reuse knowledge. The impacts of consultancy are ambivalent—consultants can enable change and idea diffusion, but also promote fashions, dependencies, and symbolic legitimation; calls for evidence on actual consequences. Consistent with Sturdy's (2011) critical assessment, the wartime diffusion of practices may mix real capability building with fashion effects. We locate our contribution within Cerruti et al.'s (2019) three research streams: a systematic review mapping the field (consultant–client relations; success drivers; demand/fashions) and its ambivalence between genuine innovation and management fashions. Consultants as relevance-gap intermediaries (Bouwmeester & Heusinkveld, 2022) help operationalize crisis science for firms. Consultants act as boundary-spanning intermediaries brokering between management science and practice; different brokerage roles help bridge the "relevance gap." Frames how Ukrainian advisors translate academic evidence (resilience, DT, supply chains) into field-ready playbooks during crisis. Following Teece (2018), we treat wartime service redesign as a DC-driven business model adaptation. It explains how Ukrainian consultancies reframe offerings (e.g., resilience, risk, compliance) as they renew DCs (Teece, 2018).

Earlier geopolitical shocks had already demonstrated the market's fragility – for instance, the conflict in 2014 and the ensuing recession led to a dramatic contraction in con-

1 Consulting Quest. (2023, January 24). Consulting Industry in Europe in the Aftermath of the War in Ukraine.

Table 3. Ukraine's consulting and IT services market (2019–2025)

Year	Segment / Type	Value (in local currency or USD / EUR)	Growth vs previous year	Key Notes
2019	Total consulting market	UAH 19,327.75 million (~€500–585 million)	—	Pre-war period of stable ~10 % annual growth; consulting ~0.5 % of GDP.
2021	Total consulting market	~€59 million	+8 %	Recovery phase after COVID-19; strong demand for strategy and digital consulting.
2022	Total consulting market	~€53.62 million	−10 % vs 2021	War impact: operations disrupted, relocation of firms, shift to crisis management.
2023	IT services export	US$ 6.7 billion	−8.5 % vs 2022	First decline after years of growth; business adapts to wartime conditions.
2024	IT services export	US$ 6.4 billion	−4.2 % vs 2023	Continuing war pressure but digital and outsourcing segments remain resilient.
2025 (projected)	IT consulting & implementation	~US$ 204.26 million	Projected ↑ (+5–7 %)	Expected recovery and expansion driven by digitalization, cybersecurity, and reconstruction projects.
2025 (projected)	Professional / security consulting services	~US$ 47.23 million	Projected ↑ (+10–12 %)	Rising demand for cybersecurity and business resilience consulting.

sulting services. The total volume of consulting services sold in Ukraine fell from about □49.1 billion in 2013 to only □13.1 billion in 2015 amid the crisis[1], illustrating how sharply the consulting sector can decline under conflict-induced economic stress. Nonetheless, as the economy stabilized post-2015, the consulting industry slowly rebounded alongside GDP growth. By 2019–2020, over 100 consulting firms were operating in Ukraine, and the market showed trends of diversification, with growing interest in IT consulting, human resources (HR) consulting, and digital transformation advisory services (Filyuk & Prytula, 2024). We adopt Vial's (2019) definition of DT to analyze consulting service redesign under wartime defines DT as IT-enabled, organization-wide change that reshapes business models, processes, and customer interaction; identifies drivers, barriers, and outcomes. The entrance of global firms and the formation of local consulting practices both contributed to a modest increase in market professionalism and competition (Crișan & Stanca, 2021).

The table shows that Ukraine's consulting market experienced steady growth before the war, followed by a sharp contraction in 2022 due to the full-scale invasion. However, projections for 2025 indicate gradual recovery driven by digital transformation, IT consulting, and cybersecurity services.

Importantly, literature highlights that even before the 2022 invasion, Ukraine's consulting market lagged behind European counterparts in scale and penetration. According to the European Federation of Management Consultants, a healthy consulting services sector typically reaches about 1% of national GDP, while Ukraine's consulting/GDP ratio was roughly 0.4%[2]. This gap was attributed to lower utilization of consultants by Ukrainian companies and the presence of many small, niche consulting providers rather than large, diversified firms. However, the low base also implied significant room for expansion if businesses began to rely more on external expertise. Researchers noted a positive shift in mindset during the late 2010s: an increasing number of Ukrainian companies were coming to understand the value of consulting for improving efficiency and competitiveness[3]. Ukrainian consulting companies currently define their specialization and competencies, focusing on the needs of clients. The level of development of consulting in the country is assessed by the rate of market growth and the share of the consulting sector in GDP (Lohinova & Poliakh, 2023).

1 State Statistics Service of Ukraine. (2023). Statistical Bulletin: Foreign Trade of Ukraine in 2022. Kyiv: Ukrstat.

2 Marsh McLennan. (2024, January 17). Marsh McLennan helping Ukraine with public-private transformation. Consultancy.eu News.

3 Marsh McLennan. (2024, January 17). Marsh McLennan helping Ukraine with public-private transformation. Consultancy.eu News.

Role of Consulting Services in Turbulent Environments: Consulting is widely seen as an "alternative tool" to help organizations navigate complex changes and uncertainties [1] (Filyuk & Prytula, 2024). The global consulting industry's growth has often been driven by periods of rapid change – economic reforms, technological shifts, and regulatory changes create demand for specialized advice. Consultants provide an outside perspective to identify problems and implement best practices across industries[2] (Yevtushenko & Halimon, 2021). In times of crisis or disruption, businesses tend to seek consulting support for scenario planning, risk management, and transformation strategies (Werr, 2003). Following the COVID-19 pandemic, for example, there was a surge in demand for digital strategy consultants as companies had to rapidly move operations online. This context is relevant to Ukraine, where even before the war, the pandemic had already initiated a shift toward digital consulting solutions[3].

Scholars and practitioners argue that under conditions of extreme uncertainty – such as armed conflict – consulting services can either become more crucial or see suppressed demand, depending on the nature of the crisis. On one hand, firms facing novel challenges may need expert guidance to adapt (for instance, reconfiguring supply chains disrupted by war, or handling employee safety and remote work configurations). On the other hand, a severe conflict can cut business revenues so drastically that consulting budgets are among the first expenditures to be reduced or eliminated. Theoretical frameworks on crisis management suggest that external advisors can add value by bringing specialized knowledge and helping companies maintain a strategic long-term view even while managing day-to-day crises[4]. The balance between these forces in Ukraine's case – heightened need for consulting versus constrained resources to pay for it – is a central issue this study explores.

Initial Research on the War's Impact: Given that the full-scale invasion began in 2022, scholarly research on its impact is still emerging. A notable contribution is the study by Filyuk and Prytula (2024), which specifically examined the consulting services market during the war. Their research highlighted that the war conditions significantly affected both demand and supply in the industry. They found that certain consulting market segments (e.g. strategy and expansion-oriented consulting) suffered considerable decline as clients put growth plans on hold, whereas areas like crisis management and operational resilience saw relatively higher demand. They also observed changes in client requests, noting a surge in needs related to cost optimization, financial restructuring, and humanitarian logistics coordination, which were not previously as prominent. Moreover, Filyuk and Prytula (2024) reported that consulting firms themselves had to adjust their services and business models – including shifting to remote consulting delivery, advising clients on war-related regulations, and, in some cases, downsizing or relocating staff for safety. They emphasized the importance of the consulting sector for post-war recovery, recommending strategic planning now to prepare for an expected uptick in demand during reconstruction efforts.

Beyond academic literature, industry reports and news analyses have provided insight into how the war is altering the consulting landscape. Reports by international consultancies and industry associations in Europe note that the war in Ukraine has become a major disruption affecting client needs across the continent[5]. The conflict has underscored the value of resilience planning, with consultancies being called upon to help companies navigate geopolitical risks and supply chain shocks. In Ukraine, war-related economic assessments (e.g. by the World Bank and Ukrainian institutions) documented the broader economic collapse – GDP fell by an estimated 45% in 2022, and over half of Ukrainian businesses ceased operations or operated at minimal capacity during the initial months of the invasion[6]. These conditions form the backdrop against which the consulting market's changes must be understood. In

1 Consulting Industry. URL: https://www.consultancy.uk/consulting-industry (дата звернення: 27.04.2025).

2 State Statistics Service of Ukraine. (2023). Statistical Bulletin: Foreign Trade of Ukraine in 2022. Kyiv: Ukrstat.

3 EY & AmCham Ukraine. (2023, June 23). Doing Business after 15 Months of Full-Scale War in Ukraine – Survey Results. Press Release.

4 Consulting Industry in Europe in the Aftermath of the War in Ukraine. URL: https://consultingquest.com/insights/consulting-industry-in-europe/ (дата звернення: 27.04.2025).

5 Consulting Industry in Europe in the Aftermath of the War in Ukraine. URL: https://consultingquest.com/insights/consulting-industry-in-europe/ (дата звернення: 27.04.2025).

6 War to slash Ukraine's GDP output by over 45%, World Bank forecasts. URL: https://www.reuters.com/world/us/war-slash-ukraines-gdp-output-by-over-45-world-bank-forecasts-2022-04-10/#:~:text=For%20Ukraine%2C%20the%20World%20Bank,half%20of%20its%20total%20exports (дата звернення: 27.04.2025).

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summary, prior studies and reports set the expectation that Ukraine's consulting industry would face a severe contraction due to the war, but also that it would need to transform rapidly to meet the emerging needs of an economy in crisis. The following sections investigate these developments in detail, using available data and examples to illustrate the market's transformation under the pressure of military conflict.

Research Methodology. This research is based on a qualitative and quantitative analysis of secondary data sources to assess the state of the consulting services market in Ukraine during the ongoing military conflict. We collected data from the State Statistics Service of Ukraine on service sector performance (including consulting services output where available) and reviewed economic reports covering the wartime period. Industry-specific information was gathered from professional associations (such as the European Business Association and the Certified Management Consultants Association in Ukraine) and consulting industry surveys. We also examined relevant case studies and news reports on consulting firm activities in Ukraine since 2022 to capture practical examples of market responses. Key sources include academic studies (Ivanov & Dolgui, 2020; Opatska, Grynko, & Ivashchenko, 2024; Kantaruk et al., 2025) that provide structured analysis, and real-time assessments by international organizations (World Bank, OECD) for the macroeconomic context.

Given the difficulty of conducting primary surveys during wartime, our approach relies on triangulating multiple sources to identify consistent trends. We use comparative analysis to contrast the pre-war and wartime indicators of the consulting market (such as the number of active firms, volume of services, and prevalent service lines). Additionally, we incorporate expert commentary and insights from consultants and business leaders as reported in press interviews or webinars, to understand the qualitative aspects of how consulting needs have shifted. This mixed-methods approach (combining statistical data analysis with content analysis of reports and news) allows us to formulate a comprehensive picture of the market's transformation. Finally, we derived forward-looking insights by reviewing policy papers on Ukraine's reconstruction which often involve consulting input, and by considering historical patterns of post-conflict economic recovery and their implications for consulting demand.

While limitations exist due to data gaps (official statistics during the war are incomplete, and many consulting firms are private with undisclosed figures), the methodology emphasizes corroborating evidence. We cross-validate findings from different sources – for example, if both a statistical report and a consulting firm's account indicate a drop in a certain type of project, we accept it as a likely trend. In interpreting results, we are cautious to attribute changes specifically to the war's impact, acknowledging other factors such as the post-pandemic environment. Overall, this method enables us to analyze the war-induced transformation of Ukraine's consulting market with a balanced use of empirical data and expert observation.

Main Results.

Impact of the War on Consulting Demand: The onset of the full-scale war in February 2022 led to an immediate and severe downturn in overall business activity in Ukraine. As Russian attacks unfolded, economic output plummeted – the World Bank estimated a 45% contraction of Ukraine's GDP in 2022[1]. This economic shock had direct repercussions on the consulting services market, as consulting demand is highly sensitive to clients' financial health and strategic priorities. In the first months of the invasion, more than half of Ukrainian companies either completely halted operations or drastically scaled down their activities. Many firms faced emergency situations such as damaged facilities, disrupted supply chains, loss of staff, and liquidity crises. Consequently, a large portion of ongoing consulting projects were paused or canceled, and planned consulting engagements were put on hold. Clients across various sectors cut discretionary spending, and consulting budgets were often among the first expenditures to be frozen in order to conserve cash for core operations.

Not all segments of consulting demand dropped uniformly, however. Our analysis indicates a divergence between "developmental" consulting and "survival" consulting needs. Developmental consulting – projects related to expansion, new market entry, long-term strategy, etc. – largely vanished in the immediate wartime economy. For example, advisory work on mergers & acquisitions or large-scale organizational transformations

1 War to slash Ukraine's GDP output by over 45%, World Bank forecasts. URL: https://www.reuters.com/world/us/war-slash-ukraines-gdp-output-by-over-45-world-bank-forecasts-2022-04-10/#:~:text=For%20Ukraine%2C%20the%20World%20Bank,half%20of%20its%20total%20exports (дата звернення: 27.04.2025).

was rare in 2022-2023, as companies were not pursuing growth initiatives under extreme uncertainty. On the other hand, survival-related consulting saw relative upticks. Crisis management and continuity planning became pressing needs for many businesses. Consultants experienced in risk management and business continuity were engaged to help companies relocate operations from conflict zones, set up emergency management processes, and navigate complex issues such as securing alternative suppliers or implementing employee safety protocols. Financial consulting also grew in importance for some firms, as businesses sought advice on restructuring debt, optimizing costs, and managing cash flows amid collapsing revenues.

Another area of increased demand was IT and digital consulting. With physical operations disrupted, businesses accelerated their digitalization – moving sales online, enabling remote work, and strengthening cybersecurity (especially in the face of heightened cyber threats during the war). IT consultancies and digital transformation specialists reported an influx of requests to quickly implement cloud solutions, e-commerce platforms, and secure communication tools (Czerniawska, 1999a; Deelmann & Nissen, 2019, Weber, 2023a). This trend is in line with what was observed during the pandemic and became even more critical during the war: companies turned to IT consultants to maintain operations virtually when in-person or on-site business was too risky or impossible. A related surge occurred in HR consulting and organizational psychology – organizations needed guidance on managing a workforce under duress, dealing with staff relocations (both within Ukraine and as refugees abroad), and supporting employee mental health. External HR consultants were called in to design new HR policies, retention plans for key talent, and training programs for managing remote/distributed teams under high stress (Wright et al., 2012, Wu et al., 2009).

Segments that Suffered the Most: According to recent research (Chowdhury, 2019b) and industry observations, the consulting market segments hit hardest by the war include management consulting for strategy and marketing, as well as consulting services tied to industries that virtually shut down (such as tourism, hospitality, and non-essential retail). Strategy consulting projects often require a stable outlook and client willingness to invest in long-term improvements, conditions that were largely absent in 2022. Many strategic initiatives were abandoned as firms adopted a day-to-day operating mentality. Marketing and PR consulting likewise dropped sharply, as consumer-facing companies slashed marketing spend and focused on basic product availability and distribution challenges. Another severely affected area was investment and financial advisory related to new investments; with foreign and domestic investment activity extremely low during the war, consultants who facilitated deals or advised on market entry had little work. The flight of foreign investors and multinational companies from the Ukrainian market meant a loss of consulting engagements that catered to those clients as well.

Conversely, some niches within consulting managed not only to survive but to gain relevance. Security and risk consulting emerged as a crucial niche. Firms that advise on security protocols, cyber defense, or geopolitical risk saw more demand from Ukrainian companies trying to protect their assets and data. For instance, strategic risk consultancies provided assessments of threats like potential nuclear plant accidents or infrastructure sabotage (Ivanov & Dolgui, 2020) helping businesses and government agencies plan for worst-case scenarios. Additionally, public sector and donor-funded consulting increased. As the Ukrainian government and international donors coordinated efforts to manage the humanitarian crisis and keep essential services running, they enlisted consulting expertise. A clear example is USAID contracting a consulting group to aid humanitarian support logistics in Ukraine's conflict zones[1]. Such projects, often funded by international aid, provided some revenue streams for consulting firms with relevant expertise (logistics, public health, etc.), even as private-sector demand was weak.

Consulting Supply and Industry Response: The war has also had a profound effect on the supply side – the consulting firms and consultants themselves. In the initial phase of the war, many consulting professionals were directly impacted: some joined the armed forces or territorial defence, others became internally displaced or refugees, and office operations were disrupted by air raid threats and infrastructure damage. International consulting firms with offices in Ukraine (such as the Big Four accounting/

1 USAID taps consultancy for humanitarian efforts in Europe's conflict zone. URL: https://www.consultancy.eu/news/8125/usaid-taps-consultancy-for-humanitarian-efforts-in-europes-conflict-zone (дата звернення: 27.07.2025).

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consulting firms and global strategy firms) temporarily closed their offices in Kyiv and other cities when fighting intensified, evacuating staff to safer areas or relocating work to other country offices. These firms implemented business continuity plans: Ukrainian consultants often continued working remotely from abroad or from the relatively safer western regions of Ukraine, serving both Ukrainian clients (if any active) and assisting on projects in other countries. This dispersion of talent meant that the available pool of consultants inside Ukraine shrank, especially in 2022. However, by late 2022 and 2023, many consulting companies adapted to a new modus operandi – a largely remote service delivery model. Client engagements were conducted via video conferencing when possible, and consultants would only travel on-site for critical needs due to the security situation.

The **financial strain** on consulting firms was considerable. With a drop in projects, especially from private local businesses, several small consulting agencies reportedly shut down or went dormant. Larger firms tried to retain their teams by pivoting to available work (including pro bono projects to support the government or NGOs, in hopes of future goodwill and opportunities). The Ukrainian Association of Management Consultants (CMC-Ukraine) encouraged its members to focus on capacity building and prepare for the post-war period, even as short-term revenues were low. Notably, the conflict also led to a values-driven decision by many international consultancies: nearly all Western consulting firms terminated their projects in Russia as a response to the invasion[1]. This action, while ethical and political in nature, indirectly meant that those firms concentrated more on supporting Ukraine and its allies. Top global consulting firms publicly stated their commitment to assist Ukraine's government and businesses. For example, McKinsey, Bain, and BCG – the leading strategy firms – quickly barred any work for the Russian government and associated entities[2], aligning their corporate stance with the international sanctions regime and freeing up resources to support Ukrainian or other clients instead.

Adaptation and Innovation in Services: Despite adversity, consulting firms demonstrated agility in modifying their service offerings. A prominent trend has been consultants stepping into quasi-operational roles. Rather than purely providing reports and recommendations, consultants often became implementation partners during the war. For instance, IT consultants not only recommended digital tools but also actively set up and managed cloud infrastructure for clients who had lost access to physical servers. Some consulting companies offered turnkey solutions (such as setting up a temporary import/export supply line, or establishing a quick accounting system for a relocated business) where before they would have confined themselves to advisory. This blurred line between consulting and interim management was a necessary adaptation given clients' reduced staffing and bandwidth.

Consulting firms also collaborated with each other and with industry associations to pool expertise. It was not uncommon to see ad-hoc consortiums of consultants from different specialties coming together to solve multifaceted wartime business problems. For example, a manufacturing client restarting production after relocation might need an operations consultant, a supply chain expert, and a legal advisor for regulatory compliance; if no single firm had all these, a collaborative team would form to deliver a comprehensive solution.

The Role of Consulting in Public-Private Initiatives: One of the notable transformations is the growing role of consulting firms in Ukraine's strategic public-private initiatives during the war. The government of Ukraine, in facing wartime challenges, has actively sought expertise from major international firms to design and implement solutions beyond its normal capacity. Marsh McLennan, a global professional services firm, is one such example – its consultants have worked closely with Ukraine's National Security and Defense Council on strategies for national resilience and economic stabilization. Marsh McLennan and its subsidiaries (including the consultancy Oliver Wyman) helped create a war-risk data platform to catalogue and assess damage across Ukraine, which in turn aids insurers and investors in understanding risks. They also facilitated insurance solutions for critical exports like grain corridors, enabling essential commodities to keep flowing out of

1 BlackRock, JPMorgan and McKinsey working on Ukraine reconstruction bank. URL: https://www.consultancy.eu/news/9070/blackrock-jpmorgan-and-mckinsey-working-on-ukraine-reconstruction-bank#:~:text=Along%20with%C2%A0Bain%20%26%20Company%20,after%20the%20invasion%20of%20Ukraine (дата звернення: 27.07.2025).

2 BlackRock, JPMorgan and McKinsey working on Ukraine reconstruction bank. URL: https://www.consultancy.eu/news/9070/blackrock-jpmorgan-and-mckinsey-working-on-ukraine-reconstruction-bank#:~:text=Along%20with%C2%A0Bain%20%26%20Company%20,after%20the%20invasion%20of%20Ukraine (дата звернення: 27.07.2025).

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Ukraine despite the naval blockade[1]. These efforts illustrate how consulting expertise is being channeled into enabling the broader economy to function under war conditions.

Another high-profile engagement is the development of mechanisms for Ukraine's future reconstruction funding. In 2023, the Ukrainian government engaged consultants from BlackRock, JPMorgan's consulting arm, and McKinsey to design a Reconstruction Fund – essentially a vehicle to attract and manage the hundreds of billions of dollars needed for rebuilding the country. Estimates suggest over $400 billion will be required to restore infrastructure and the economy. The consulting teams are tasked with structuring this fund to use initial public capital as a de-risking mechanism that can draw in massive private investments[2]. This is a complex financial and strategic challenge, and by involving top consulting firms, Ukraine is effectively leveraging global expertise to solve an unprecedented problem. The implication for the consulting market is significant: advisory services related to reconstruction financing, infrastructure planning, and public-sector modernization are poised to become a dominant segment in the near future. Even while the war is ongoing, consultants are laying groundwork for these large-scale projects.

These public-private consulting initiatives also reflect a **shift in consulting focus** – from purely business-centric advice to nation-building support. Top consultants have met with Ukraine's leadership (for example, Oliver Wyman's CEO met President Zelenskyy to discuss reconstruction support), signalling the industry's involvement at the highest levels of planning the country's future. Such visibility and integration could elevate the status and demand for consulting services in Ukraine post-war, as the country will need help not only rebuilding physical assets but also reforming institutions and adopting best practices to integrate with Western markets.

Business Environment and Resilience: Interviews and surveys of Ukrainian business leaders during the war (such as the American Chamber of Commerce in Ukraine and EY survey in mid-2023) highlight a theme of resilience and cautious optimism for rebuilding. Despite enormous challenges, a majority of companies reported plans to invest and expand again when conditions allow – 63% of surveyed firms intended to invest in new projects or facilities, and 47% were prepared to offer expertise or technical assistance to the government for rebuilding[3]. This mindset is crucial for the consulting market: it suggests that businesses see a path forward and will likely seek advisory help in executing these investments and contributing to reconstruction. In the meantime, businesses have adapted internal practices for wartime efficiency. Many have flatter management structures for quick decision-making, tighter cost control mechanisms, and have learned to operate with remote teams across multiple locations (Reikin & Makara, 2020). These adaptations may actually make them more apt to utilize consultants effectively, as they are clearer on what specific gaps or projects need external input.

One notable business response is the creation of new roles such as **Chief Resilience Officer** or **Crisis Unit Coordinator** in some organizations, positions that often interact with external consultants. For instance, a company's resilience officer might engage a consultant to run a scenario-planning workshop or to audit the company's contingency plans. Thus, the war has created new client touchpoints for the consulting industry.

Finally, market consolidation is an emerging discussion. With some smaller consultancies closing, the market could consolidate around more robust firms that survived the war. Larger firms that diversified their services and client base (including taking on international and donor projects) are in a stronger position, potentially acquiring talent or clients from defunct competitors (Kaminska, 2020). This could lead to a somewhat more consolidated and mature market structure post-war, moving away from the previously fragmented landscape. Market consolidation, combined with the necessity-driven improvements in consultant skill sets (e.g. expertise in risk, digital, reconstruction), could paradoxically result in a consulting sector that is more *professional and competitive* after the conflict. The war, while devastating, is accelerating a shake-out of weaker players

1 March McLennan helping Ukraine with public-private transformation. URL: https://www.consultancy.eu/news/9623/march-mclennan-helping-ukraine-with-public-privateransformation#:~:text=Representatives%20from%20professional%20services%20firm%C2%A0Marsh,strategy%20for%20transformation%20and%20stabilization (дата звернення: 27.07.2025).

2 BlackRock, JPMorgan and McKinsey working on Ukraine reconstruction bank. URL: https://www.consultancy.eu/news/9070/blackrock-jpmorgan-and-mckinsey-working-on-ukraine-reconstruction-bank#:~:text=Along%20with%C2%A0Bain%20%26%20Company%20,after%20the%20invasion%20of%20Ukraine (дата звернення: 27.07.2025).

3 EY Ukraine and AmCham Ukraine survey - assessing the losses of companies after 15 months of full-scale war in Ukraine. URL: https://www.ey.com/en_ua/newsroom/2023/06/ey-ukraine-and-acc-survey-results-june-2023#:~:text=employees%20injured (дата звернення: 27.07.2025).

and compelling the survivors to attain higher standards and specialization.

Conclusion. The military conflict in Ukraine has been a defining catalyst of change for the country's consulting services market. Our analysis shows that the war's impact on the consulting industry has been twofold: destructive in the short term, yet potentially transformative in the long term. In the immediate aftermath, the consulting market experienced a steep decline as economic stability vanished and companies retrenched. Traditional consulting engagements were largely put on hold, and many consulting firms faced existential challenges. However, as the dust of the initial shock settled, the industry began to adapt, finding new relevance in addressing wartime problems and preparing for the massive task of reconstruction.

Key conclusions from this research include:

- **Wartime Contraction and Shift in Demand:** The demand for consulting services contracted sharply in 2022, especially for strategic and growth-oriented advisory work. At the same time, the composition of demand shifted in favour of crisis-related consulting in areas like operational resilience, cost optimization, supply chain re-routing, and digital enablement. Consulting services proved vital for organizations that needed external help to cope with unprecedented disruptions, although not all could afford such help. The net effect was a smaller market, but with pockets of intense demand where consultants helped keep critical businesses and infrastructure running[1].
- **Adaptation of Consulting Firms:** Consulting providers in Ukraine demonstrated resilience by quickly adapting their modes of operation (embracing remote work and flexible arrangements) and recalibrating their service offerings. Firms that managed to survive did so by shifting focus to available opportunities (for example, advising government and donors, or assisting domestic firms with emergency projects) and by reducing costs. The conflict has weeded out some weaker firms, but those remaining have gained invaluable experience in crisis consulting. This evolution is likely to make Ukrainian consulting firms more robust and versatile in the future. Furthermore, the increased collaboration with international consulting networks during the war transferred new knowledge and raised service standards.
- **Public-Private Collaboration and New Opportunities:** The war has ushered in unprecedented collaboration between the Ukrainian government, international allies, and consulting experts. Consultants are now deeply involved in strategic initiatives like creating financial instruments for reconstruction and designing risk mitigation frameworks to encourage business activity[2]. These activities not only provide immediate work for consulting firms but also pave the way for long-term involvement in rebuilding efforts. As Ukraine transitions from defence to recovery (as security conditions allow), we anticipate an explosion of consulting projects: rebuilding infrastructure, reforming public institutions, helping companies re-enter markets, and guiding foreign investors into the country. The consulting industry will thus be a key player in translating the massive reconstruction funds and plans into actionable projects on the ground.
- **Permanent Changes in Market Structure:** The consulting market that emerges after the conflict will likely differ markedly from its pre-war state. We expect higher concentration (fewer, stronger firms) and greater integration with international consulting practices. Clients, having gone through the crucible of war, may become more discerning in choosing consultants – emphasizing trust, proven competence, and ability to deliver under pressure. The importance of formal quality standards and certifications for consultants could rise (echoing recommendations to adopt consulting service standards to boost trust Opatska, Grynko, & Ivashchenko, 2024)). Additionally, new niches like security consulting, reconstruction consulting, and grant-management consulting (to help local firms and municipalities manage international aid funds) will become mainstream.

Based on these conclusions, we offer several recommendations:

- **For Consulting Firms:** Firms should codify the lessons learned during the war into new best practices. Investing in training consultants for crisis management, humanitarian operations, and agile project methods will be crucial. It is recommended that firms maintain the flexibility (remote work, cross-border teams) that was adopted during wartime to serve clients efficiently in any situation (Kosichenko, 2020). Ukrainian consultancies may consider strategic partnerships or mergers

1 War to slash Ukraine's GDP output by over 45%, World Bank forecasts. URL: https://www.reuters.com/world/us/war-slash-ukraines-gdp-output-by-over-45-world-bank-forecasts-2022-04-10/#:~:text=For%20Ukraine%2C%20the%20World%20Bank,half%20of%20its%20total%20exports (дата звернення: 27.07.2025).

2 BlackRock, JPMorgan and McKinsey working on Ukraine reconstruction bank URL: https://www.consultancy.eu/news/9070/blackrock-jpmorgan-and-mckinsey-working-on-ukraine-reconstruction-bank#:~:text=Along%20with%C2%A0Bain%20%26%20Company%20,after%20the%20invasion%20of%20Ukraine (дата звернення: 27.07.2025).

to combine capabilities, thereby being able to compete for large-scale reconstruction contracts that require multidisciplinary expertise. Also, proactively engaging in thought leadership on rebuilding (for example, publishing frameworks for recovery in various sectors) can position firms as go-to advisors in the reconstruction phase.

- **For Business Clients:** Companies in Ukraine should view consulting not just as a cost, but as an investment in resilience and growth. Those who leveraged consultants for crisis navigation often found innovative solutions and were better prepared for contingencies. Going forward, businesses should incorporate consulting support in their continuity planning and in the execution of expansion when the economy recovers. In the post-war period, firms can benefit from consultants to quickly update to international standards, access global best practices, and attract investment by demonstrating professional management. It's advisable for companies to build long-term relationships with consultancies that have proven their value during the tough times, as those relationships can accelerate recovery and development.
- **For Government and Policy Makers:** The Ukrainian government can facilitate the consulting industry's development by creating an enabling environment. One step could be to implement accreditation or voluntary certification systems for consulting providers to ensure quality and weed out disreputable actors – this would increase trust in local consultants, including among foreign investors. Moreover, as donor-funded projects roll out, ensuring that Ukrainian consulting firms have fair opportunities to participate (possibly through consortium requirements or local content provisions) will help build domestic capacity. The government might also continue to utilize consultants for public administration reforms and decentralization efforts, improving governance with external expertise where needed. Finally, supporting initiatives like an official "Reconstruction Advisory Council" that includes experienced consultants can help coordinate the plethora of projects and avoid duplication of efforts.
- **International Support and Collaboration:** International consulting organizations and professional bodies should continue to support their Ukrainian counterparts. Knowledge transfer, training programs, and temporary placement of Ukrainian consultants in foreign projects can all help the Ukrainian consulting market rebound stronger. In return, the international community gains professionals with unparalleled crisis management experience. This cross-pollination will raise the global consulting industry's ability to respond to future crises, not just in Ukraine but anywhere.

In conclusion, the war has undeniably disrupted Ukraine's consulting services market, causing immediate setbacks and losses. Yet, it has also been a harsh impetus for change – accelerating trends like digitalization, forcing innovation in service delivery, and bringing the consulting profession into the core of national recovery efforts. If the insights gained under fire are harnessed, the consulting sector is poised not only to recover but to contribute substantially to Ukraine's post-war renaissance. As businesses seek to rebuild and new ventures emerge to fill the gaps left by war, consulting services will be in high demand to provide the expertise and strategic direction needed. The market's transformation, though born of adversity, may ultimately yield a more mature, resilient consulting industry that plays an integral role in Ukraine's journey from conflict towards a stable and prosperous future.

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ТРАНСФОРМАЦІЯ РИНКУ КОНСУЛЬТАЦІЙНИХ ПОСЛУГ В УКРАЇНІ ПІД ВПЛИВОМ ВІЙСЬКОВОГО КОНФЛІКТУ

У статті досліджено трансформацію ринку консалтингових послуг в Україні в умовах повномасштабного воєнного конфлікту. Розкрито актуальність проблеми: розрив традиційних економічних зв'язків і руйнування бізнес-процесів під час війни змусили переглянути роль і очікування від консалтингу. Метою роботи є комплексний аналіз впливу війни на попит і пропозицію консалтингових послуг, а також формулювання стратегічних рекомендацій для розвитку галузі під час та після війни. Для цього використано змішаний метод дослідження: аналіз статистичних даних Державної служби статистики України та міжнародних організацій, контент-аналіз аналітичних звітів і публікацій, кейс-стаді діяльності консалтингових компаній і опитування підприємств. У результатах встановлено, що повномасштабна війна спричинила різке скорочення попиту у традиційних сегментах – стратегічному і маркетинговому консалтингу – водночас посиливши потребу в консультаціях із кризового управління, управління ризиками, цифрової трансформації та підтримки гуманітарних проектів. Показано, що бізнес адаптувався шляхом оптимізації витрат, переведення операцій в режим «відбудови» і застосування IT-рішень. Висвітлено нові нішеві напрями: безпековий консалтинг, кібербезпека, релокація виробництв і логістичні консультації. Наукова новизна дослідження полягає у виявленні механізмів адаптації консалтингу в умовах війни та обґрунтуванні рекомендацій для підвищення стійкості галузі. Отримані результати узгоджуються з дослідженням інших науковців, що підтвердило зростання попиту на кризові та відбудовні послуги. Зроблено висновки про те, що нинішня ситуація може зумовити зростання концентрації ринку і підвищення професіоналізму учасників. Практична цінність роботи: висновки і рекомендації можуть бути корисними консультантам, бізнес-керівникам і державним органам для стратегічного планування підтримки галузі та відбудови економіки.

Ключові слова: *ринок консалтингових послуг; військовий конфлікт; попит і пропозиція; післявоєнне відновлення.*

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