31st December

1998

Survey of the European Management Consultancy Market

feaco

Report Contents

Introduction by Gil Gidron

Chairman, European Federation of Management Consulting Associations (FEACO)

It gives me great pleasure to introduce the 1998 edition of the FEACO annual survey for the European Management Consultancy Market. Consultancy is undergoing an unprecedented period of growth. It has become one of the most dynamic and strategic industries as a result of the added value it generates and its contribution to the competitiveness of the European Companies and Institutions.

The economic, business and social environment is changing rapidly. This process of change is a stimulus to the demand of qualified and professional consulting services. In a unified Europe, the Consulting Industry will continue to grow and will be increasingly more competitive.

Factors such as the globalization of markets, the increase of pan-European operations, the deregulation of some industries, the wave of consolidation and concentration, the new opportunities arising from the technology and telecommunications development as well as the effect of the year 2000 and the Monetary Union are shaping the environment and influencing the demand for consulting services.

In this period of economic and business transformation, Management Consultancy shows two diverse trends. On the one hand, the larger consulting firms are adopting an integrated approach with the objective of designing and implementing comprehensive business solutions to clients' problems and opportunities. On the other hand, consulting companies focused on niches are emerging, capable of providing services in specific industries, functions and markets.

At the same time, the industry is concentrating and turning more global. The offering is also evolving from generic to one of multidisciplinary teams of specialists that add tangible value to clients. As a result, new disciplines are being developed and are becoming a part of the consulting profession.

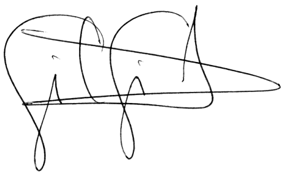
Throughout this overall change in the business environment and in the consulting profession itself, 1998 was again an excellent year for Management Consultancy in Europe. Management Consultancy is a 25 billion Euro industry. With respect to the previous year, the market has experienced a growth of above 15% in most European countries.

Consulting is an employment-generating activity throughout Europe, offering young graduates excellent opportunities for professional development. The number of university graduates being employed by the sector continues to augment each year and it is estimated that in 1998 there were some 200.000 consultants in Europe.

FEACO has developed as an umbrella federation representing 22 national associations from across Europe. It has become the unified voice of the industry, a point of reference for the European Commission and a forum for networking of consulting professionals through its different working groups, meetings, conferences, publications and other activities.

1998 has been a very active year for FEACO in several areas. FEACO sponsored two specific seminars on Consulting and the European Commission in Brussels as an integrated part of the initiatives with the EC that had large attendance from National Representation Offices, the European Commission and Consultancies. The FEACO 1998 Annual Conference on The Levers of Change in the Technological and Communication Era held in Athens was an interesting event where different views on the impact of technology and communications in Consultancy were exchanged. During 1999, the FEACO Annual Conference will be held in London, November 17-18, on Consulting into the New Millennium and in the year 2000, FEACO will host the Management Consultants World Conference in Berlin, October 4-7, on Management Consultancy in a Single World.

To conclude, and only a few months away from the 21st century, we must stress the optimism which prevails as regards the development of our profession in the future. The consulting business faces the challenge of helping organizations transform themselves and becoming more competitive in a constantly changing environment.
The Electronic Economy is causing a revolution in almost all industries and is having a major impact on our lives. In this new world of unlimited business opportunities generated by the new electronic channels, Management Consultancy should be a point of reference and a source of innovation for organizations and institutions across Europe.



Gil Gidron
FEACO Chairman

Europe –Statistical Overview –1998

	Estimated Total MC Fee Income by Country (€)	Estimated Total MC Fee Income of Members (€)	Estimated Number of Consultants by Country	Number of Consultants by Members	Number of Support Staff by Members	Average Annual Earnings per Consultant - Members (€)
Austria	422,000,000	422,000,000	2,090	2,090	–	201.914
Belgium	440,550,400	276,345,250	2,860	1,840	–	150,188
Cyprus	15,000,000	10,000,000	200	120	30	83,333
Denmark	500,000,000	47,000,000	4,000	312	80	150,641
Finland	389,000,000	92,500,000	3,500	510	120	181,373
France*	1,760,000,000	736,000,000	15,400	4,600	–	160,000
Germany	9,543,000,000	2,284,000,000	62,500	11,500	3,000	198,609
Greece	85,908,000	49,500,000	1,003	500	179	99,000
Hungary	150,000,000	94,000,000	3,000	898	300	104,677
Italy	2,252,000,000	536,000,000	32,000	5,000	1,000	107,200
Netherlands	720,000,000	540,000,000	6,000	4,000	–	135,000
Norway*	612,480,000	160,080,000	4,930	1,500	170	106,720
Poland*	95,000,000	11,000,000	2,035	180	60	61,111
Portugal	399,038,313	49,024,703	4,000	250	75	196,099
Russia	64,000,000	49,000,000	3,900	3,000	1,000	16,333
Slovenia	29,166,000	13,750,000	225	82	23	167,683
Spain	938,400,000	560,000,000	16,000	8,000	1,500	70,000
Switzerland	513,000,000	193,000,000	2,700	900	360	214,444
United Kingdom	5,800,000,000	2,947,000,000	35,000	12,500	2,000	235,760
TOTALS	24,728,542,713	9,070,199,953	201,343	57,782	12,897	

** estimated by FEACO*

The Present Market

1998 was another successful years for the management consultancy industry in Europe. The fee income represented by FEACO´s member associations rose to 9.1 billion Euro, or 36 % of the European market, now estimated at around 25 billion Euro. The survey indicates a growth of about 15 % for those countries where comparison can be made with the 1997 figures, while fee income, for FEACO members alone rose even more distinctly by 20 %. On the whole it is probably more realistic to say that the overall growth is about 10 %. If consideration is given to earnings additional to fee income, such as revenues from outsourcing activities, software licenses, etc., then earnings for FEACO members and for the total European consultancy market are probably closer to 11 billion Euro and 27 billion Euro respectively.

The survey indicates that there are around 200,000 management consultants operating in Europe. Practices which are members of organisations federated to FEACO employ over 57,000 management consultants, almost 30 % of the total European market. Both figures show an increase of around 10 % for those countries where comparison was possible with last year's figures, making the consulting industry one of the biggest recruiters of highly qualified People, particularly University graduates, in Europe.

As it was the case in the last years Germany and the United Kingdom represent the largest management consultancy markets, accounting for around 60 % of all European fee income. Nonetheless Italy (11 %), France (7 %), Spain (4.6 %) and the Netherlands (3.1 %) all have sizeable markets. Switzerland, the United Kingdom, Hungary and Germany saw an above average growth rate in the last year.

When comparing each country's national management consultancy market with its GNP, the United Kingdom and Germany appear to have an above average consultancy market, whereas France's is below average. Italy, Spain, the Netherlands, Switzerland and Austria have markets which could be described as the norm in comparative terms; meaning the proportion of consultants´ fee earnings is equal to that of GNP when taken as a percentage of the European total.

As predicted last year by FEACO, Information Technology (consultancy and systems development/ integration combined) proved to be the greatest generator of fee income in 1998, accounting with 9.2 billion Euro for 37.4 % of the total fee income. Being replaced as the major service area compared to 1997, Corporate Strategy & Organisation Development is second in 1998 and accounted for 20.8 % at 5.1 billion Euro. Nevertheless, in terms of earnings alone, Corporate Strategy & Organisational Development did increase compared to 1997 as did fee income from Financial & Administrative Systems, Production & Services Management and Project Management. Human Ressources, Economic & Environmental Services and Marketing & Corporate Communication showed decrease.

In terms of employment of management consultancy it is difficult to find a common thread for all European countries. In most of the European countries the Banking & Insurance sector was the biggest purchaser of management consulting services. Accounting for over 25 % of total use this industry sector was the largest employer of management consultancy in Europe. Transportation & Communication (15.6 %) can be said to take second position, with Manufacturing (15.4 %) coming close behind. Overall, 13.1 % of total fee revenue came from the Public Sector, but it is interesting to note that the proportional use within the respective countries varied from over 50 % in Hungary to 4.7 % in Spain.

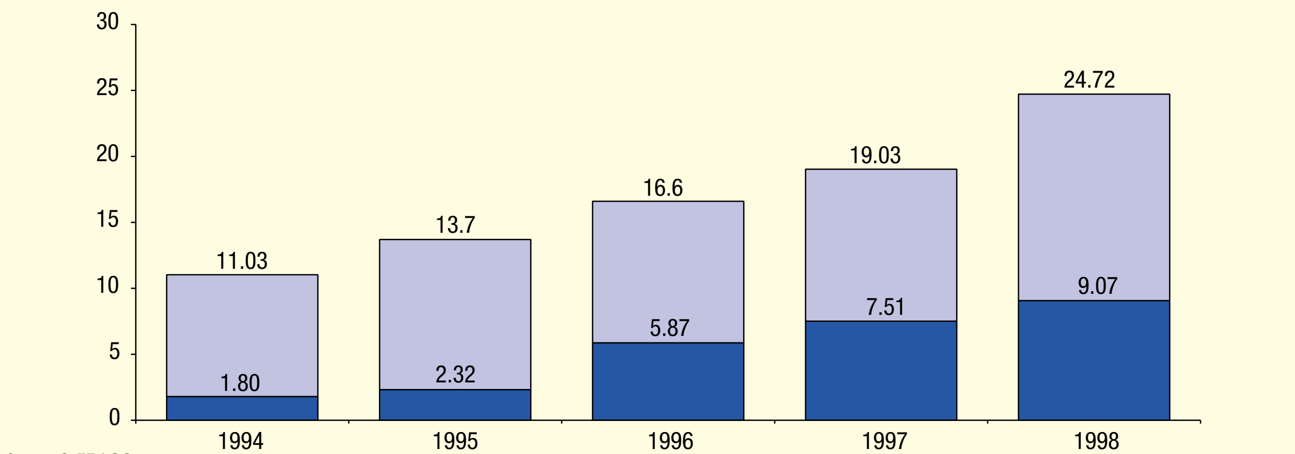
The Future

In the survey member firms federated to FEACO were invited to give an outlook for the consulting industry in the various key service areas as well as for the demand for consulting services by economic sector. Regarding the service areas the majority predicted for the third consecutive year that information technology work would be the activity with the best prospects followed by Corporate Strategy & Organisation Development and Financial & Administrative Systems. All the other services were seen equally as areas for steady growth. Considering the various economic sectors the Financial Services industry, the Retail industry and International Business were seen as the key markets for management consultancy for 1999.

Being asked for the key drivers for management consultancy in the near future many firms emphasised the following:

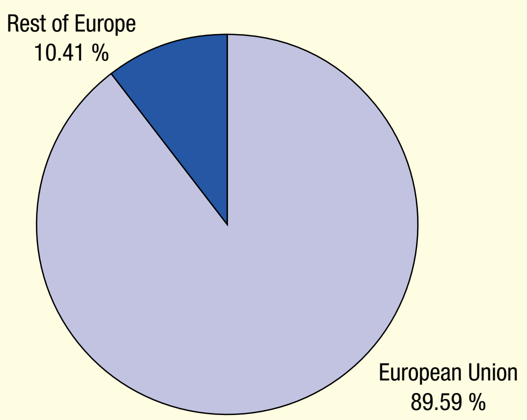
- intensification competition through globalisation
- privatisation and deregulation
- rapid advancement in the area of information technology and issues such as e-commerce
- Mergers & Acquisitions.

Total Fee Income for Europe (Estimated) and FEACO –Annual Comparison (billion €)



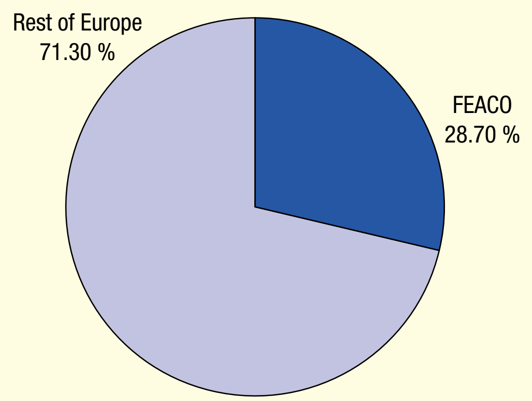
Source: © FEACO

Breakdown of Fees (European Union and Rest of Europe) (percent)



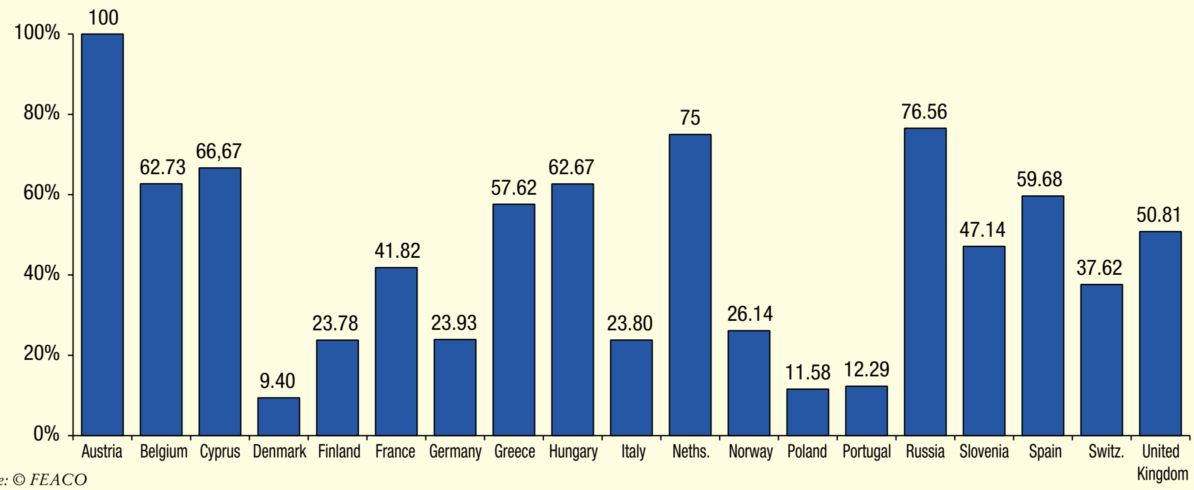
Source: © FEACO

FEACO Share of Total European Consultancy Market by Consultants Employed (percent)



Source: © FEACO

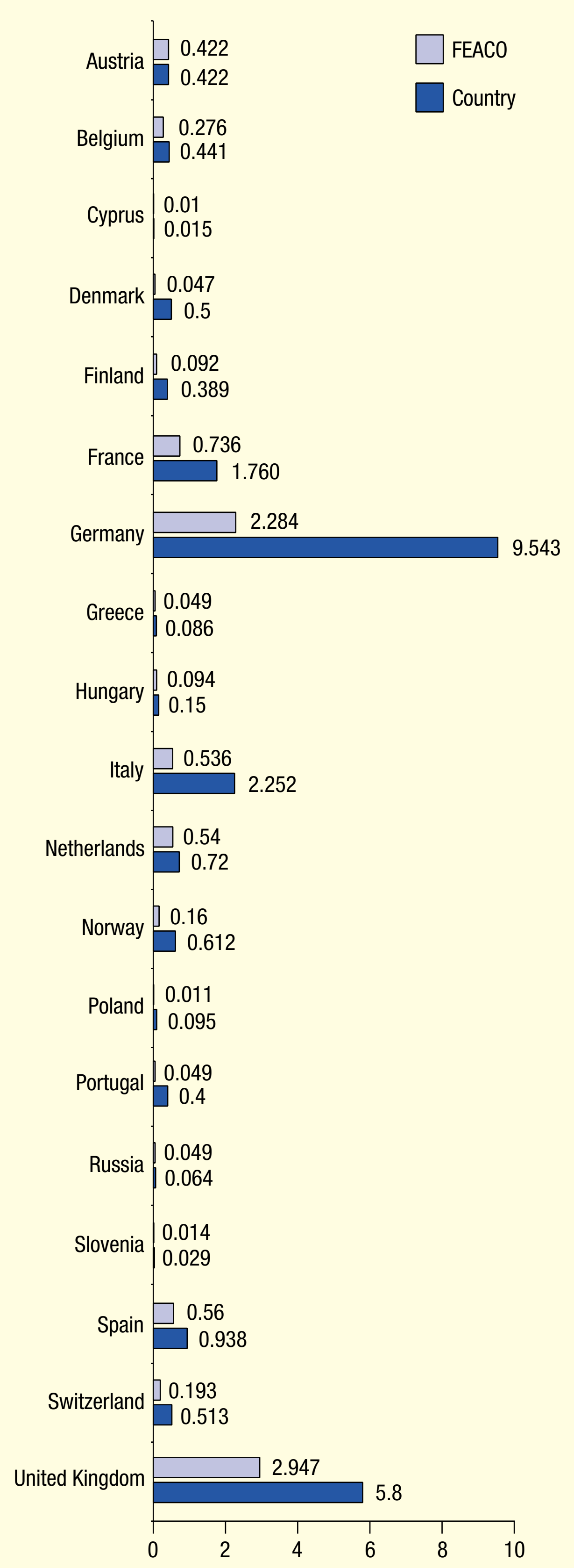
Market Share of FEACO Members in their Respective Countries (percent)



Source: © FEACO

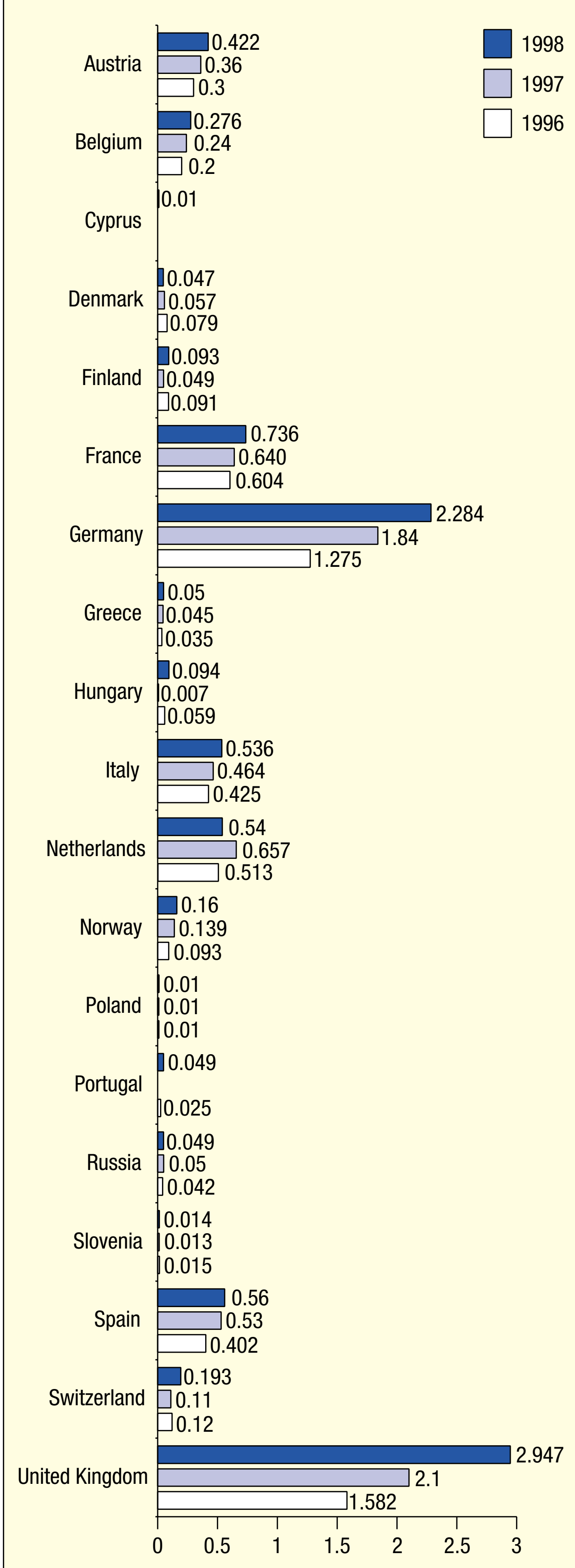
Breakdown of Revenue by Country

Total Fee Income by Country and FEACO Members –1998 (billion €)



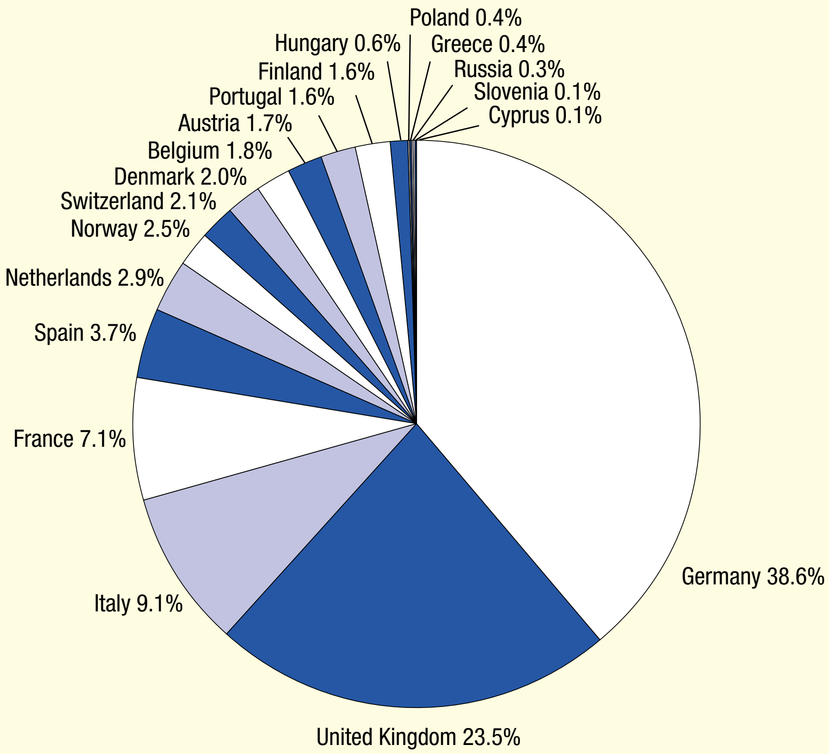
Source: © FEACO

Total Fee Income for FEACO by Country 1996 - 1998 (billion €)



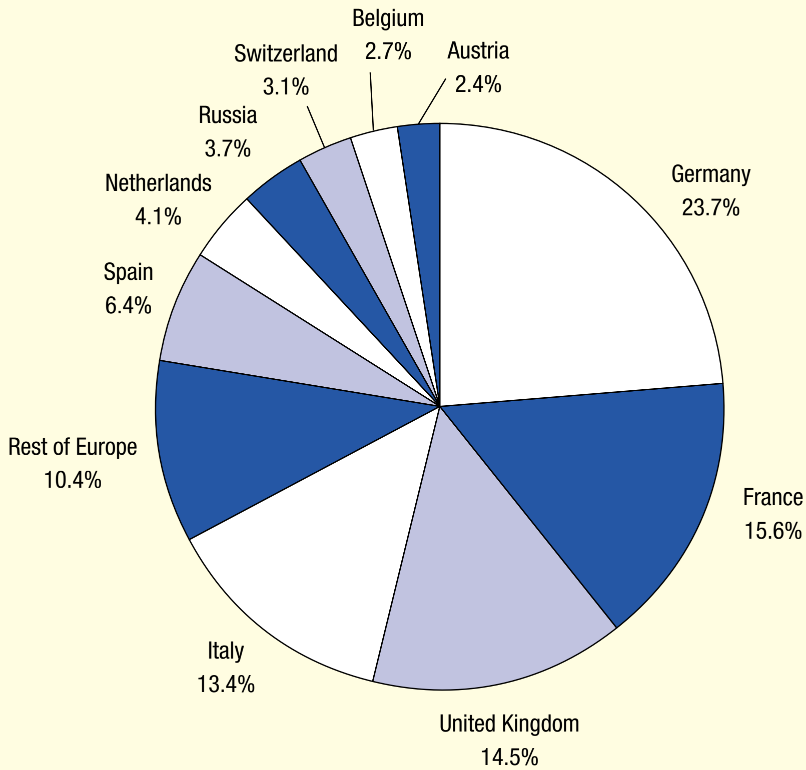
Source: © FEACO

Breakdown of Total Fee Income for Europe –By Country (percent)



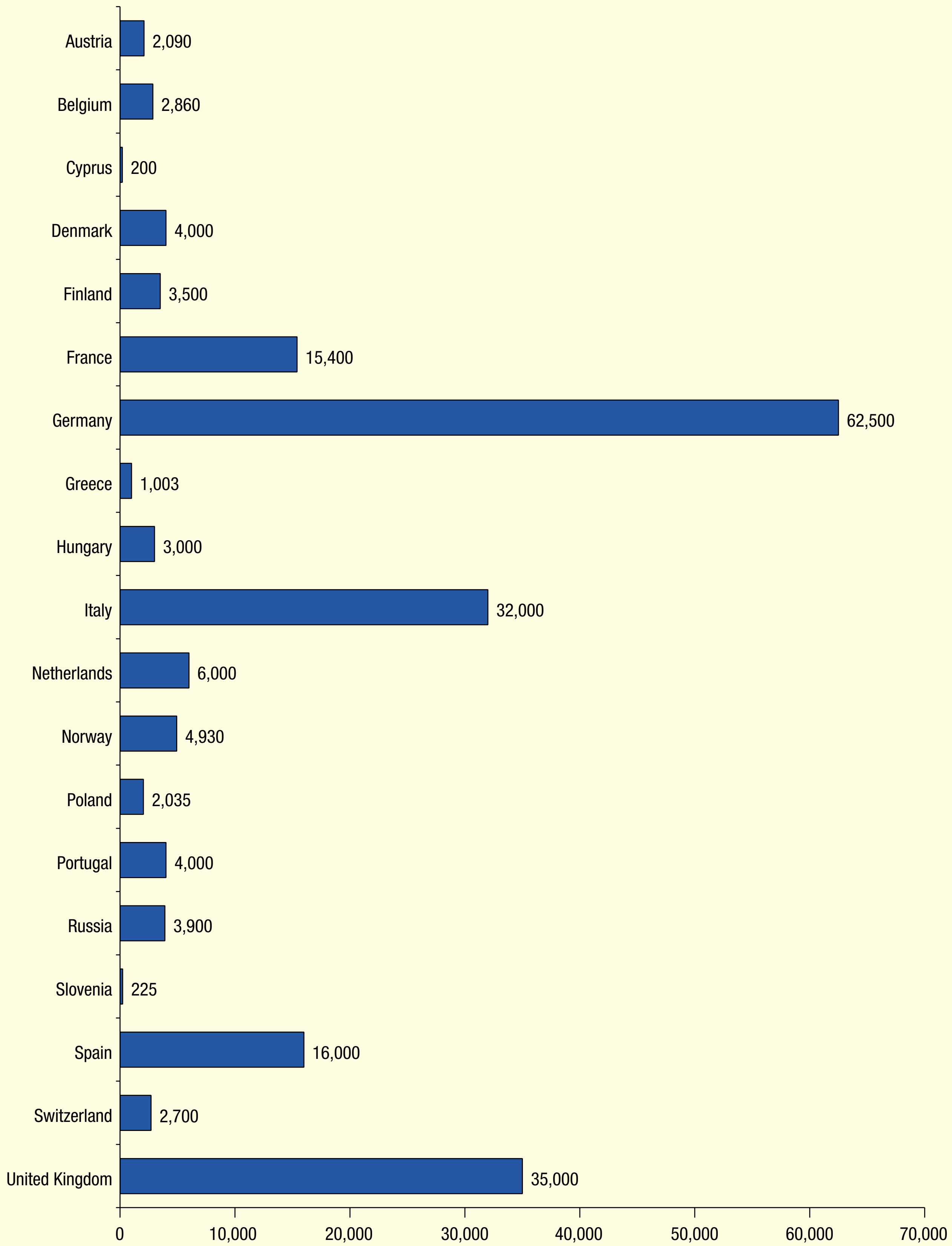
Source: © FEACO

GDP of FEACO Member Countries as Proportion of Europe (percent)



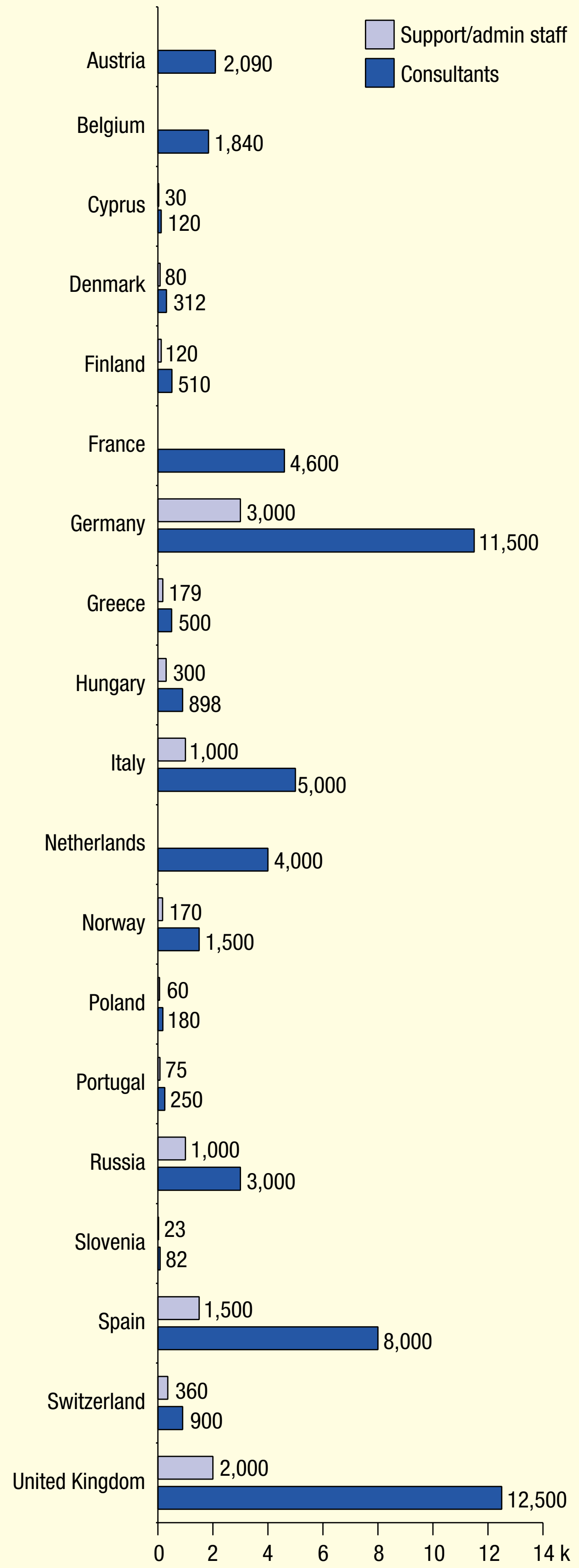
Source: © FEACO

Estimated Number of Consultants per Country –1998



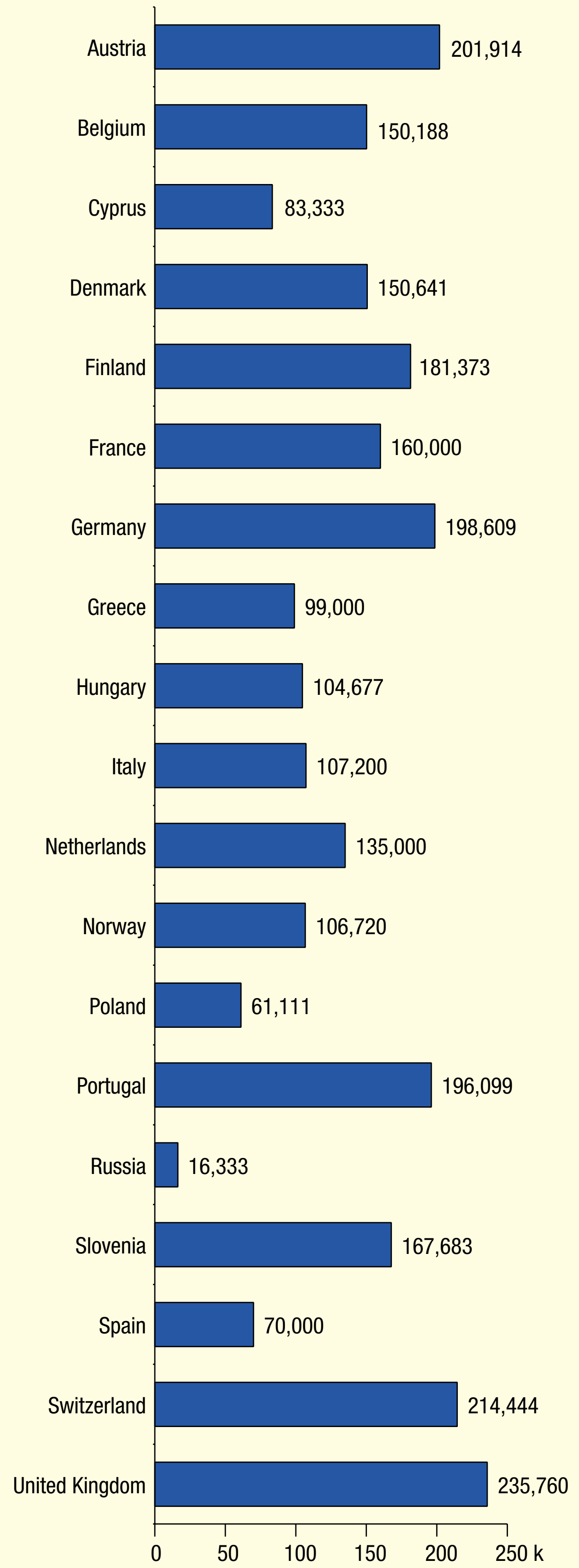
Source: © FEACO

Number of Employees in Member Associations



Source: © FEACO

Average Annual Fee Earnings per Consultant per Member Association (€)



Source: © FEACO

Market Breakdown of Members Fees by Industry Sector and Key Service Area

Market Breakdown of Members Fees by Industry Sector (percent)

	AUT	BEL	CYP	DEN	FIN	GER	GRE	HUN	ITA	RUS	SLO	SPA	SWI	UK	TOTAL
Agriculture, forestry & fishing	4	0	0	1.1	1	0.3	9.63	1	1	1	0.94	0.05	1	0.3	0.63
Energy & water supplies industries	2	2.09	2.25	0.03	2	5.2	4.45	16	10	10	3.43	10.56	5	16.3	10.04
Mining/metals/minerals/chemical	2	4.8	0	0.2	9	1.1	1.53	14	6	15	7.18	1.24	8	7.7	4.7
Manufacturing	32	10.13	17.2	9.2	6	21.8	3.27	6	10	10	19.56	13.88	15	11.2	15.43
Foods, beverages	3	1.03	5	2.4	4	3	4.28	5	5	10	11.2	7.68	5	0	2.55
Clothing/textiles/leather goods	7	0.48	3.9	0.7	1	3.8	1.49	3	6	5	7.91	0.07	3	0	2.21
Construction	2	0.95	6.8	0.06	2	3.5	0.33	1	2	5	0.89	0.38	2	0.5	1.68
Wholesale & retail trade	9	1.08	12.8	2.2	4	8.6	3.46	15	6	10	10.83	1.36	11	4.9	6.13
Transport & communication	11	22.59	5	25.81	37	12.2	3.49	14	17	10	9.76	18.09	10	17.3	15.61
Banking and insurance	2	16.73	10.4	1.2	18	19.3	6.15	14	26	5	7.69	41.63	21	31.7	25.13
Professional services	13	19.23	16.5	5.9	8	3.1	2.38	2	2.5	5	7.14	0.34	2	0	2.81
Health	5	3.1	0	3.5	1	7.5	2.2	1	2	2	0	1.05	5	0.3	3.13
European Commission	1	11.81	0	17.4	0	3	22.64	2	0.5	3	3.03	0.05	0	1.4	2.21
National government	3	0.48	15.15	19.3	5	3	24.22	3	4	3	3.78	1.19	4	7.4	4.78
Nationalised industries	2	0	0	0	1	1	8.47	2	1	3	4.6	0.88	3	0.3	0.87
Regional government	2	5.5	5	11	1	3.6	2.01	1	1	3	2.06	1.55	5	0.7	2.09
TOTALS	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*

Source: © FEACO

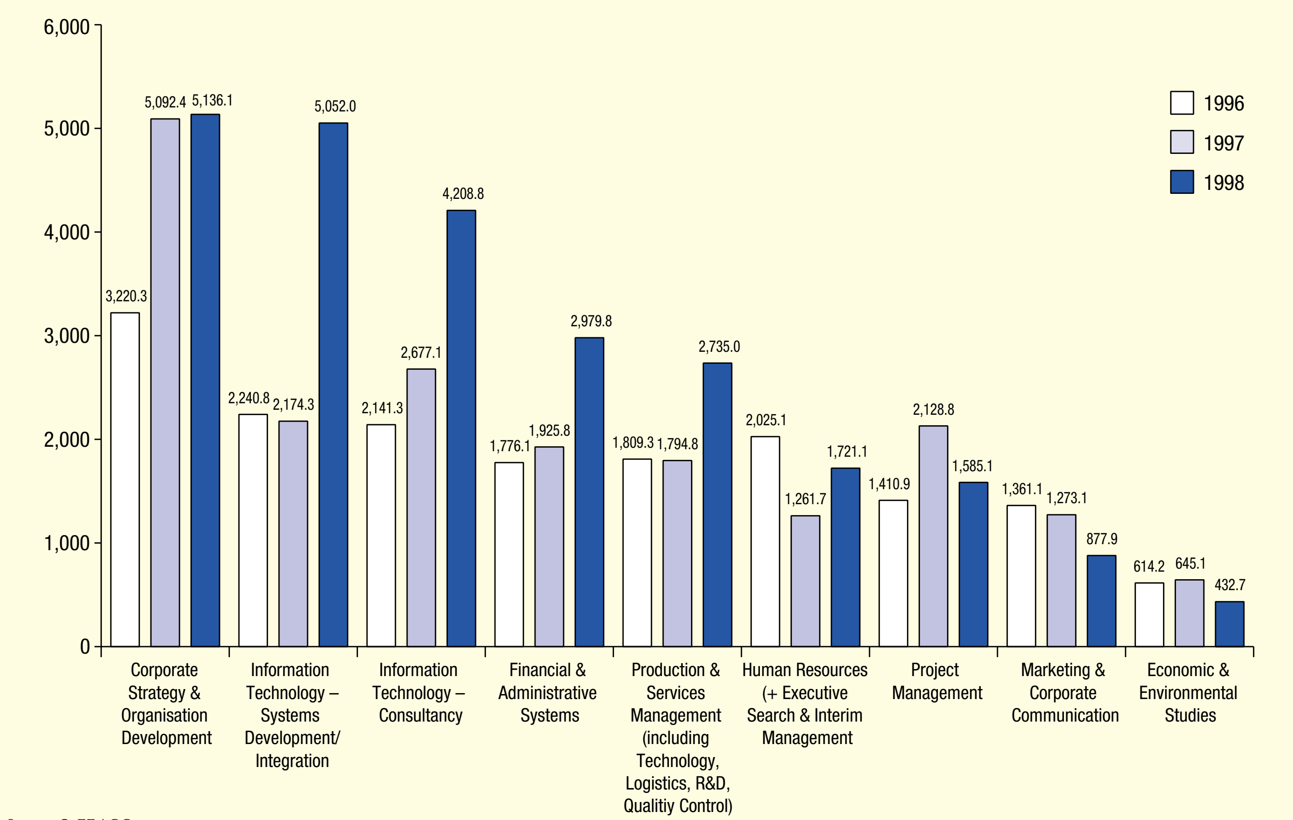
Market Breakdown of Members Fees by Key Service Area (percent)

	AUT	BEL	CYP	DEN	FIN	GER	GRE	HUN	ITA	RUS	SLO	SPA	SWI	UK	TOTAL
Corporate Strategy & Organisation Development	34	5.81	6	21.2	29	29.7	16.61	16	18	10	19.61	5.5	25	17.5	20.77
Financial & Administrative Systems	12	29.35	7.4	3.3	13	11	12.18	30	15	15	26.18	6.4	8	11.6	12.05
Human Resources (+ executive search & interim management)	16	2.79	26.3	13.6	12	9	3.07	11	9	15	10.02	4.3	13	3.7	6.96
Production & Services Management (including technology, logistics, R&D, quality control)	13	2.6	6.3	9.5	6	13.6	17.21	7	18	5	16.86	5.7	14	9.4	11.06
Marketing & Corporate Communication	9	2.5	13	6.6	6	3.4	3.54	2	7	15	1.15	1	7	2.3	3.55
Information Technology – Consultancy	5	9.61	16.2	22.5	14	17.8	6.9	8	11	5	4.77	20	4	21.1	17.02
Information Technology – Systems development/integration	5	37.92	2	1.6	12	8.5	4.13	5	15	15	12.92	53.1	23	25.1	20.43
Project Management	4	7.86	5	4.6	5	5.9	28.83	15	6	15	4.4	3	5	7.3	6.41
Economic & Environmental Studies	2	1.56	17.8	17.1	3	1.1	7.53	6	1	5	4.09	1	1	2	1.75
TOTALS	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*	*100*

Source: © FEACO

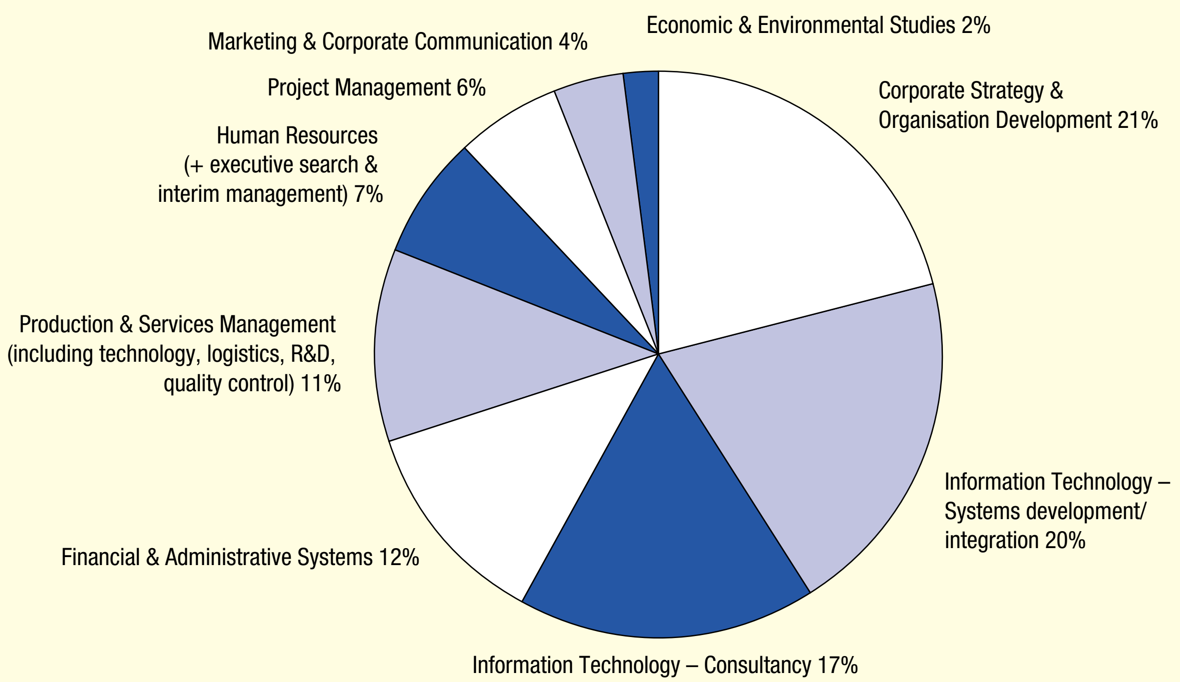
Breakdown of Fees by Key Service Area –Overall Europe

Fee Income by Key Service Area (Estimated) **(Million €)**



Source: © FEACO

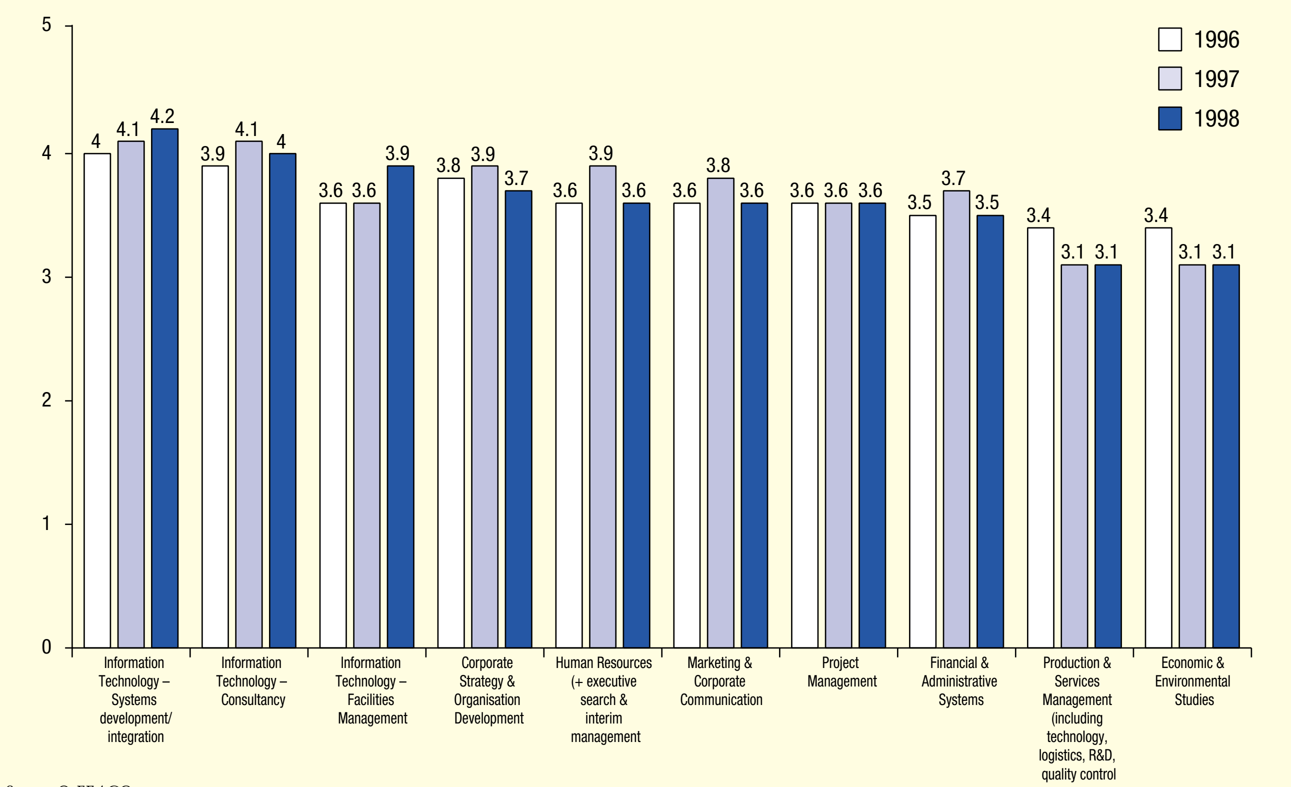
Percentage Breakdown by Key Service Area **(percent)**



Source: © FEACO

Outlook Based on Views of FEACO Members' Firms (1)

Outlook for Consultancy in Key Service Areas in 1998 –Overall Europe (where 1 = 'worse' and 5 = 'better')



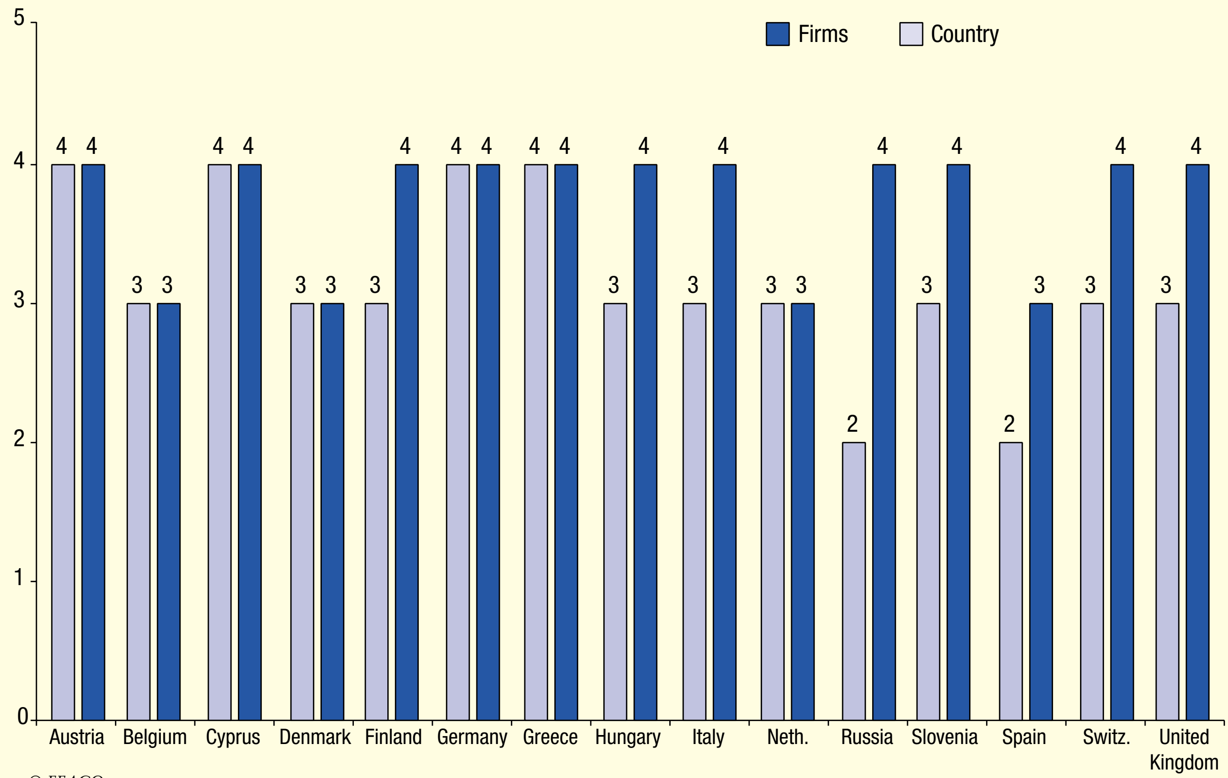
Source: © FEACO

Outlook for Consultancy in Key Service Areas in 1998 –By Country (where 1 = 'worse' and 5 = 'better')

	AUT	BEL	CYP	DEN	FIN	GER	GRE	HUN	ITA	NE	RUS	SLO	SPA	SWI	UK	TOTAL
Corporate Strategy & Organisation Development	3	4	4	4	4	3	4	3	4	3	5	3	3	4	4	3,7
Financial & Administrative Systems	3	3		3	4	4	4	4	3	3	5	3	4	2	4	3,5
Human Resources (+ executive search & interim management)	2	4	3	4	5	4	4	4	4	3	3	4	3	4	3	3,6
Production & Services Management (including technology, logistics, R&D, quality control)	2	4	3	3	3	4	4	3	3	2	3	4	2	3	4	3,1
Marketing & Corporate Communication	4	4	4	4	4	3	4	3	3	4	4	4	2	4	3	3,6
Information Technology – Consultancy	5	3	5	4	5	5	4	4	4	4	2	4	4	3	4	4,0
Information Technology – Systems development/integration	5	4	5	4	5	5	4	4	4	4	2	4	4	4	5	4,2
Information Technology – Facilities Management	5	5	4	4	5	3	4	3	4	4	2	3	4	4	5	3,9
Project Management	3	4	4	4	5	4	4	3	3	3	4	4	3	2	4	3,6
Economic & Environmental Studies	3	3	4	4	4	2	4	3	2	3	2	4	2	3	3	3,1

Source: © FEACO

Outlook for the Economy and Outlook for Consultancy Firms in 1998 by Country (where 1 = 'worse' and 5 = 'better')



Source: © FEACO

Demand for Consultancy by Economic Sector (where 1 = 'worse' and 5 = 'better')

	AUT	BEL	CYP	DEN	FIN	GER	GRE	HUN	ITA	NE	RUS	SLO	SPA	SWI	UK	TOTAL
Manufacturing	3	3	4	3	3	4	3	3	3	3	4	3	3	2	3	3,1
Retail	4	4	5	3	5	4	4	3	4	3	4	3	3	3	4	3,7
Financial Services	4	3	3	4	4	4	4	4	4	4	2	4	4	4	5	3,8
Public Sector	2	3	4	4	3	3	4	3	4	3	4	4	2	4	2	3,3
International Business	3	4	4	4	4	4	4	3	3	3	3	3	4	4	4	3,6

Source: © FEACO

Consultancy Opportunities - National Views

Belgium
1. ERP area – heavy demand from all sectors
2. E-commerce – telecom operators and other sectors
3. European Institutions – new policies for the period 2000-2006

Cyprus
1. Public sector – liberalisation and privatisation, EC programs
2. EU entry – preparation of businesses and the economy
3. Overseas markets development

Denmark
1. Information technology in general – great need for systems, control, development; internet opportunities; year 2000
2. Culture facilitation – internationalisation Eastern Europe
3. Human resources – lack of young people

Germany
1. Corporate strategy – merger & acquisitions and post-merger-integration
2. Human resources management
3. Liberalisation, privatisation

Greece
1. Public sector – National government, EC (implementation of environmental policy, MEDA)
2. Information technology – industry applications, internet, information society, outsourcing, facilities management
3. Privatisation

Italy
1. Information technology – Euro and year 2000 implementation; implementation of ERP systems; bridge the gap between strategy and day by day operation; electronic commerce
2. Corporate strategy and organisation development – globalisation/ internationalisation; fast scenario changes; merger and post merger needs; privatisation and changes in public administration
3. Human resources – needs of continuos and updated training; generally adoption of human resources management to changes indicated above

Netherlands
1. Organisational culture
2. Cross-cultural communication

Hungary
1. IT Consultancy
2. Human resources management – increasing demand for and diminishing supplies of qualified and well-trained individuals in key sectors and dynamic regions.
3. Corporate strategy and organisation

Russia
1. Corporate strategy and organisation development
2. Marketing and corporate communication
3. Human resources

Slovenia
1. Human resources – people are the main production factor in Slovenia
2. Information technology – ERP Solutions, Introduction of VAT
3. Process redefinition and growth management

Spain
1. Liberalisation, Privatisation
2. Concentration, Mergers
3. Year 2000 and Euro

Switzerland
1. Corporate Strategy
2. Information technology
3. Logistics

United Kingdom
1. IT – Euro, Outsourcing, Year 2000, E-Commerce
2. Corporate strategy – M&A activity, E-Commerce

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FEACO is the European Federation of Management Consulting Associations. It is a non-profit making and independent professional organisation committed to represent and promote management consultancy throughout Europe. Its primary objective is to provide support to its constituent National Association membership in those areas where a collective voice is stronger than the sum of its individual members. More specifically this is achieved by:

- Encouraging networking by members through the sponsorship of conference, meetings and mutual interest working groups
- Maintaining a watching brief over the image of industry by the promotion of common professional standards of ethics and of quality
- Maintaining a relationship with the European Commission and other pan-European organisation to ensure a full awareness of the issues concerning commercial and contractual obligations in relation to the procurement of management consultancy services
- Sponsoring the provision and distribution of market information and statistics

Among its various activities, FEACO sponsors regular Professional Conferences and one Management Consultants World Conference every three years. Regular seminars are also sponsored on professional and technical matters of general interest, such as Quality Assurance, EU aids, structural funds, etc. It has recently published two booklets designed to assist both consultants working for the European Commission and Commission officials in the process of procuring consultancy. Mutual interest working groups meet regularly to co-ordinate policy relating to the above objectives and to discuss new areas of interest such as the Internet.

Fields of activity include:

- Corporate Strategy and Organisation Development
- Marketing and Corporate Communication
- Financial and Administrative Systems
- Information Technology and Systems
- Human Resources (including Executive Search)
- Project Management
- Production and Services Management
- Economic and Environmental Studies

FEACO's membership consists of 12 national associations from the European Union, 3 from EFTA, 6 from Eastern Europe and 1 from the Mediterranean Base. They have in their collective membership some 1,500 management consultancy firms and over 57,000 consultants. All members of a national association federated to FEACO subscribe to the FEACO Code of Professional practice guaranteeing the quality of client service. A copy of this code can be obtained either from the address above or from member national associations listed on the following page. The FEACO membership requirements ensure that each member firm of a national association has established a sound reputation for its work and that there is a depth of consulting experience to ensure that a firm is competent to advise clients.

FEACO Member Associations

at 12 June, 1999

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