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NATIONAL CONSULTING INDEX-

GLOBAL REPORT

ICMCI
NATIONAL
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INDEX
GLOBAL
REPORT

The
INTERNATIONAL
COUNCIL OF
MANAGEMENT
CONSULTING
INSTITUTES

CMC - GLOBAL

FOREWORD

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The profession of management consulting is focused on adding value to our client organizations. Whatever the specialty, the intent is to help clients ensure that their organizations can be more successful. This has positive social and economic impacts which help with the sustainable growth. This happens at the micro level with more effective organizations generating more profit which can be reinvested. The combination of these micro impacts can help to drive the economic growth of the country.

On the other hand, the success of the management consulting industry in a country is dependant on many factors in that country. These factors could be thought of as indicating the readiness of a country for the profession of management consulting. This relationship has not been understood until recently.

As a global organization, charged with the advancement of the management consulting profession globally, this is important information to have. We are grateful to our dedicated taskforce, acknowledged later in this report, who pursued research into this area.

Because of their work, we can be proud to announce this first edition of the National Consulting Index (NCI) Global Report. It is a marvelous piece of work, which has identified the five key factors at a national level that indicate the readiness of an economy for the emergence of management consulting as a profession. This Index can also provide indicators both to the profession and to governments where energy might be focused to help strengthen and grow the profession within that country.

Thank you to all involved for the work that has led to this excellent resource. It is truly a resource that helps us in our Vision, ***to be a leader in the development of management consulting as a profession that drives social and economic success.***

INTRODUCTION & BACKGROUND

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Management consultants use their know-how to support clients in any sector locally, regionally and globally to deal with important issues such as handling complexity, achieving sustainable organizational growth, innovating, achieving change and enhancing productivity. The management consultancy industry makes a substantial contribution to the world economy". [1]

Management consulting services need general conditions that allow professional delivery of the services. These conditions vary from country to country. ICMCI as the leading global body of Management Consultants has defined a set of parameters that describes the environment for the management consulting industry and publishes these parameters in the National Consulting Index (NCI).

The ICMCI National Consulting Index is also a method of estimating the size ($ value) of the management consulting (MC) sector in any country in the world. The NCI is founded on a ICMCI research workstream which started in 2018, the Consulting Readiness Index project.

The value of the global consulting industry is estimated at over $130bn (consultancy.org, 2018). It is generally accepted that the world's bigger economies are also where the bigger national MC sectors exist - the European Federation of Management Consultancies estimates that three countries (France, Germany and UK) generate nearly three quarters of consulting revenue. However, there is also substantial cross-national variance in its prominence of MC as an activity Data reported by consulting.org, based on World Bank information, suggested a seven-fold difference between the prominence of MC as a proportion of national gross domestic product across a sample of nations (Consulting.org, 2018).

[1] See ISO 20700:2017 Management Consulting Services - Introduction

CONCEPT & METHODOLOGY

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> *The quest for insight into possible factors or indicators germane to the development/strength of a country's management consulting sector involved desk research and engagement with the ICMCI's community of Academic Fellows.*

CONCEPT & METHODOLOGY

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The quest for insight into possible factors or indicators germane to the development/strength of a country's management consulting sector involved desk research and engagement with the ICMCI's community of Academic Fellows.

Academic Fellows are prominent researchers and thought leaders from around the world with an interest in the management consultancy sector. Most have professorial positions at universities or business schools and most have extensive publication records in the sector. The ICMCI has a community of around sixty Academic Fellows. Input on behalf of the ICMCI Board, the sponsors of this work, was also provided – ICMCI Board members typically have prominent roles in consulting practices and insight into the global management consulting sector.

The aim of the NCI project was to be able to identify factors that seemed to account for variances in the strength of national MC sectors and then, by creating the NCI for each country, estimating the value of any country's MC market.

The first stage was to quantify of the degree of difference in the strength of MC between countries. For this, data from fourteen countries were selected for which the size of the MC sector was already known. These countries were, by alphabetical order: Australia; Brazil; Canada; China; France; Germany; Italy; Netherlands; Japan; Russia; Spain; Switzerland; UK, and USA.

Determining the size of national markets can be both difficult and contentious. There were two pitfalls the project sought to avoid, to help give this work as much substance as possible. These were the pitfall of interpretation and the pitfall of consistency. 'Management consultancy' is a subset of the broader consultancy market and how such a term is interpreted might vary from country to country. How the size of a market

might be calculated could also vary by country or by research project. This led to the decision for the NCI to use only market size data from a single source. In this way (assuming interpretive and methodological consistency within that source), the project was able to move forward with a means of offering meaningful comparison. With this as a key requirement, all the data on the national market sizes for management consulting firms were obtained from Source Global Research (2). Those familiar with the global consulting sector will recognize Source Global Research as an independent commercial body which researches the sector and acts a consultant/ information source to many of the major players in the worldwide professional services. A single reference for MC market size was essential to enable valid comparisons country to country. Source's explanation of 'management consulting' embraces advisory services (3) but not implementation services (for example delivering technology/change projects) or additional fees that consultants may earn through consulting work (for example risk insurance commissions). The NCI study focuses on this understanding of MC, not the broader category of 'consulting'.

As stated above, a single source was used for the size of the management consultancy markets in each of the countries. This enabled a) consistency of interpretation of the term 'management consultancy', b) a consistent process by which the market size data were gathered, and c) a robust and independent foundation to the data. Without such consistency it would be hard to trust the comparability of the data – which is key to the creation of an index.

The aim was to give the NCI worldwide applicability. This meant that factors of relevance to the NCI were those with global scope and global consistency in their provenance. This requirement had the effect of excluding some potentially useful factors at screening stage. But this

[2] https://www.sourceglobalresearch.com
[3] Advisory services include strategy, HR, operations, risk, M&A due diligence, technology/digital strategy consulting

requirement meant that whatever the NCI research concluded it could be used with confidence in any country in the world. There was an understanding that as an index, the NCI would draw in secondary data as primary research conducted faithfully across the 190+ countries on the planet would be both expensive and time consuming. We also suspected that no single extra factor would account for the MC variance and the NCI would be a multifactor index.

We followed these principles in the creation of the NCI:

a) to only work with factors which were reliable on a global basis, which means their data were based on the same assumptions and research method, which help facilitate relevant comparison between different countries anywhere in the world;
b) to only work with factors that were valid in this context, which means the factor (or combination of factors) show a strong correlation;
c) to not confuse correlation with causality, the role of the NCI is to provide a means of estimating the size of any country's management consulting sector; and
d) to exercise prudence in the creation of the NCI, with the starting point that each factor merits equal weighting and each factor should be different to other factors (recognizing that some of the factors may be of multi-factor indices themselves and there was a danger of double counting an ingredient).

With the help of prior research into variances in national MC markets and input from the ICMCI's global network of academic fellows, a list of thirty-seven possible factors was created. Each of these factors was considered from two perspectives: reliability and validity.

Reliability, which was a yes/no categorisation, was based on whether data that existed around that factor was comprehensive (worldwide) and generated consistently, irrespective of geography. Factors that weren't reliable were eliminated from further consideration. A factors' validity was determined by calculating its correlation with the variance in the relative strength of MC in a country. The correlation function in MS Excel was used to show the 'r' value (r values range from -1 to +1) with perfect correlation being indicated by +1 and perfect inverse correlation being -1.

The results of this investigation into factor reliability and validity led us to determine that some factors which were present in the literature on the relative strength of management consulting had to be eliminated from the analysis because of the absence of reliable data. This doesn't mean the factor is irrelevant in terms of MC market strength, just that there is no robust source of the necessary information upon which to carry out the analysis. For example, the presence of MBA graduates in a country could well indicate a strong MC sector, but at present there is global data on this. Some countries might be able to furnish a figure for the number of MBA graduates in its population, but not every country. And for those that have such a figure, there is no guarantee the method by which the figure has created is consistent across those geographies. Similarly, the presence of overseas aid in a country may indicate a disposition for countries to have a strong MC industry, but there is currently no reference source of presence of overseas aid on a country by country basis.

Some factors, despite their consistency of approach, had to be disregarded because their coverage wasn't fully global. Potential factors like the International Property Rights Index and the Global Innovation Index, which are reliable in their foundation, might have been found to have a role in the NCI if they had covered more countries.

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By the same token, not all of the factors for which reliable data exist were valid. Some failed scrutiny when correlation was calculated and others lacked the granularity for correlation to be determined, for example the national presence of firms (such as 'Accenture office') is either a yes or no. Hence, with only the data points of 0% and 100%, lacks the granularity for any correlation to surface. The result of the analysis was nine factors which were both reliable and had a high correlation with the variance in strength of national MC sectors.

Having identified nine globally reliable and valid factors, the next step was to test combinations of factors with the objective of finding the combination with the highest 'r' value in respect of the cross-national MC variance. This combination would become the NCI. This involved the repeated testing of combinations of the nine factors ensuring each factor was equally weighted and no factors unwittingly duplicated certain aspects. The index was conceived as a product of its factors with the factor values multiplied together to create the NCI. The equal voice of factors was achieved in part by giving each factor the same 0-1 scale in the correlation testing.

The highest correlation came from a combination of five particular factors and based on analysis to date, is offered as the NCI. These five factors combined to give a correlation $r = 0.931$ with national variance in MC strength. This NCI equation is a function of five independent indicators and combines: cultural individualism (IDV); Index of Economic Freedom; e-Government Development (EGDI); Global Creativity Index (GCI); and Corruption Perceptions Index (CPI), and is represented as NCI = ƒ(IDV, IEF, EGDI, GCI, CPI).

CONCEPT & METHODOLOGY

The five NCI factors combine elements of societal individualism, the ability to trade openly/freely, the degree to which public services (hence society) embraces the digital agenda, ingredients around human creativity and the quality of human capital, societal tolerance and the absence or otherwise of corruption.

Hofstede: Individualism-Collectivism (IDV).
This is a culture measure. It highlights the degree to which people in a society are integrated into groups (Hofstede, G., 2011). Individualistic societies have loose ties that, in the opinion of Hofstede, often only relate to an individual's immediate family. In collective societies, these integrated relationships tie extended families and others into 'in-groups'. These 'in-groups' are characterised by internal loyalty and mutual support, for example in the face of conflict with another group. IDV scores range from 0-100 with higher scores reflecting the more individualistic societies. High individualism correlates with a strong MC presence within management practice.

Index of Economic Freedom (IEF) (The Heritage Foundation, 2018).
The Index of Economic Freedom was created in 1995 by The Heritage Foundation and The Wall Street Journal. It is designed to measure the degree of economic freedom within a country. This is based on twelve factors within four broad categories: the rule of law; government size; regulatory efficiency; and open markets. The index has a scale of 0-100, with higher scores representing countries with greater economic freedom (each of the twelve factors is equally weighted to create the index).

e-Government Development Index (EGDI) (United Nations, 2018).
This index is a United Nations creation and has its roots in the UN General Assembly Resolution 66/288 'The Future We Want'. This strand of the resolution takes an information and communication technology focus and looks at the flow of information between governments and the public and recognises the power of communication technologies to promote knowledge exchange, technical cooperation and capacity building for sustainable development. The index scale is 0-1 with higher scores representing countries with the more developed e-government processes.

Global Creativity Index (GCI) (Florida, R., Mellander, C., King, K.M., 2015).
This is a four-dimensional ranking of countries. It combines individually ranked countries based on creativity, technology, talent and tolerance in the overall score. The CGI is published by the Martin Prosperity Institute which belongs to the University of Toronto's Rotman School of Management. The index ranges from 0-1 with higher score representing higher national creativity.

Corruption Perceptions Index (CPI). (Transparency International, 2018).
This index has been published annually since 1995 by Transparency International. It ranks countries by their perceived levels of corruption, as determined by expert assessments and opinion surveys. The index uses a scale of 0-100 where 0 is very corrupt and 100 is very clean.

Having established a high correlation ($r = 0.931$) between the strength of a national MC sector and the NCI, the next task involved determining the numerical values that were specific to that relationship. To do this, the best-fit straight-line relationship was calculated using a least-squares approach.

CONCEPT & METHODOLOGY

The optimal straight line fit in the data follows the equation NCI = 0.8757 (MC market x 100/GDP) + 0.0355. This line crosses the vertical axis at 0.0355. We made a modification to the best fit line to acknowledge that in practice the line would need to pass through the graph's origin, which meant when the MC market is zero, the NCI is also zero. This adjustment changed the NCI equation to:

NCI = 0.9785 (MC market x 100)/GDP

Or

MC market = (GDP x NCI) / 97.85

The NCI now provided the ability to make an estimate of the size ($ value) of the management consulting sector for any country in the world. In full, the equation for determining the value of country's MC market is…

MC market = GDP x ((IDV/100) x (IEF/100) x EGDI x GCI x (CPI/100))/97.85

… where MC is in $m and GDP is in $m

The next stage was to test it against the reference data. Here seven additional countries were added where the size of the national management consulting market was also known (data provided by Source Global Research). These countries were Chile, Denmark, India, Ireland, Mexico, Poland, South Africa. The degree of closeness of the NCI-derived estimate between the national MC market and the known figure gives a sense of the applicability of the CRI approach to countries where the size of the MC market is not currently known.

The data show that, in the majority of situations, the NCI provides a more accurate method to determining MC market size than using the single metric of GDP. There are instances where the NCI is extremely close but also occasions where the gap between what the NCI suggests and the reality of a national MC market is high.

CONCLUSIONS

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"The methodology described above was applied for all the countries and territories which are actual members of ICMCI. Without being a perfect tool, the National Consulting Index (NCI) can be seen as a means of determining the relative strength of a management consulting sector."

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The next tables contain, for the countries which have Institutes of Management Consulting as members of ICMCI, the results of the analysis and calculation of NCI.

Table 1: Countries, GDP, Population, NCI

No	Country	GDP (2018) US $m	Population (m) 2018	National Consulting Index
		https://data.worldbank.org/indicator/NY.GDP.MKTP.CD	https://en.wikipedia.org/wiki/List_of_countries_by_population_(United_Nations)	
1	Algeria	173,758	42,228,408	
2	Armenia	12,433	2,951,745	
3	Australia	1,433,904	24,898,152	0.4923
4	Austria	455,286	9,100,835	0.1963
5	Bangladesh	274,025	161,376,708	0.0044
6	Brazil	1,868,626	209,469,323	0.0334
7	Bulgaria	65,133	7,051,608	0.0312
8	Canada	1,713,342	37,074,562	0.3825
	Caribbean*			
9	Dominican Republic	85,555	10,627,141	0.0121
10	Jamaica	15,714	2,934,847	0.0280
11	Trinidad and Tobago	23,808	1,389,843	0.0106
12	China	13,608,152	1,427,647,786	0.0142
13	Chinese Taipei (Taiwan)		23,726,460	
14	Croatia	60,972	4,156,405	0.0326
15	Cyprus	24,962	1,170,125	
16	Finland	276,743	5,522,576	0.3639
17	Germany	3,947,620	83,124,418	0.3067
18	Hong Kong	362,682	7,371,730	
19	Hungary	157,883	9,707,499	0.1200
20	India	2,718,732	1,352,642,280	0.0178
21	Iran	454,013	81,800,188	0.0171
22	Ireland	382,487	4,818,690	0.2877
23	Israel	370,588	8,381,516	0.1265
24	Italy	2,083,864	60,627,291	0.1450
25	Japan	4,971,323	127,202,192	0.1510
26	Jordan	42,231	9,965,318	0.0202
27	Kazakhstan	179,340	18,319,618	0.0401

CONCLUSIONS

Table 1: Countries, GDP, Population, NCI - continued

No	Country	GDP (2018) US $m	Population (m) 2018	National Consulting Index
28	South Korea	1,619,424	51,171,706	0.0450
29	Kosovo	7,939	1,845,000	
30	Lebanon	56,639	6,859,408	0.0104
31	Lithuania	53,429	2,801,264	0.0984
32	North Macedonia	12,672	2,082,957	
33	Mongolia	13,067	3,170,216	0.0315
34	Netherlands	913,658	17,059,560	0.4394
35	New Zealand	204,924	4,743,131	0.5399
36	Nigeria	397,270	195,874,683	
37	Philippines	330,910	106,651,394	0.0236
38	Romania	239,553	19,506,114	0.0277
39	Russia	1,657,555	145,734,038	
40	Serbia	50,597	6,957,754	0.0211
41	Singapore	364,157	5,757,499	0.1192
42	South Africa	368,289	57,792,518	0.0657
43	Sweden	556,086	9,971,638	0.3742
44	Switzerland	705,140	8,525,611	0.3307
45	Thailand	504,993	81,800,188	0.0115
46	Turkey	771,350	82,340,088	0.0246
47	Ukraine	130,832	44,246,156	0.0133
48	United Kingdom	2,855,297	67,141,684	0.4403
49	United States	20,544,343	327,096,265	0.4074
50	Zimbabwe	31,001	14,438,802	

CONCLUSIONS

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Table 2: Countries, and 5 specific Indexes: Hofstede, IEF, EGDI, GCI and CPI

No	Country	Hofstede IDV (individualism-collectivism)	IEF Index of Economic Freedom 2018 (Heritage Foundation)		EGDI eGovernment index (United Nations) 2018 DATA		GCI Global Creativity Index - 2015 DATA		CPI Corruptions Perception Index 2018 (Transparency International)	
			Rank	#s	Rank	#s	Rank	#s	Rank	#s
		https://www.hofstede-insights.com/product/compare-countries/	https://www.heritage.org/index/						https://www.transparency.org/cpi2018	
1	Algeria	-	14	44.7	133	0.4227	102	0.279	105	35
2	Armenia	-	20	68.7	87	0.5944	103	0.269	105	35
3	Australia	90	4	80.9	2	0.9053	1	0.97	13	77
4	Austria	55	17	71.8	20	0.8301	20	0.788	14	76
5	Bangladesh	20	29	55.1	115	0.4862	95	0.316	149	26
6	Brazil	38	27	51.4	44	0.7327	29	0.667	105	35
7	Bulgaria	30	47	68.3	47	0.7177	48	0.505	77	42
8	Canada	80	1	77.7	23	0.8258	4	0.92	9	81
	Caribbean*									
9	Dominican* Republic	30	18	61.6	95	0.5726	78	0.38	129	30
10	Jamaica*	39	5	69.1	118	0.4697	50	0.502	70	44
11	Trinidad and* Tobago	16	22	57.7	78	0.644	67	0.433	78	41
12	China	20	24	57.8	65	0.6811	62	0.462	87	39
13	Chinese Taipei (Taiwan)	17	5	76.6	NA	NA			31	63
14	Croatia	33	39	61	55	0.7018	58	0.481	60	48
15	Cyprus	-	24	67.8	46	0.8202	66	0.446	38	59
16	Finland	63	15	74.1	1	1	5	0.917	3	85
17	Germany	67	14	74.2	23	0.9213	14	0.837	11	80
18	Hong Kong	25	1	90.2	NA	NA	21	0.715	14	76
19	Hungary	80	26	66.7	45	0.7265	28	0.673	64	46
20	India	48	30	54.5	96	0.5669	99	0.292	78	41
21	Iran	41	13	50.9	86	0.6083	57	0.481	138	28
22	Ireland	70	2	80.4	22	0.8287	13	0.845	18	73
23	Israel	54	3	72.2	31	0.7998	30	0.665	34	61
24	Italy	76	36	62.5	24	0.8209	21	0.715	53	52
25	Japan	46	8	72.3	10	0.8783	24	0.708	18	73
26	Jordan	30	5	64.9	98	0.5575	78	0.38	58	49
27	Kazakhstan	69	11	69.1	39	0.7597	84	0.357	124	31
28	South Korea	18	27	73.8	3	0.901	31	0.66	45	57
29	Kosovo	-	27	66.6	NA	NA	NA	NA	93	37
30	Lebanon	40	12	53.2	99	0.553	94	0.317	138	28
31	Lithuania	60	11	75.3	40	0.7534	51	0.49	38	59
32	North Macedonia	-	18	71.3	79	0.6312	74	0.391	93	37
33	Mongolia	71	27	55.7	92	0.5824	81	0.37	93	37
34	Netherlands	80	10	76.2	4	0.9888	10	0.889	8	82
35	New Zealand	79	3	84.2	5	0.9831	3	0.949	2	87
36	Nigeria	30	12	58.5	117	0.4831	NA	NA	144	27
37	Philippines	32	13	65	75	0.6461	52	0.487	99	36

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Table 2: Countries, and 5 specific Indexes: Hofstede, IEF, EGDI, GCI and CPI - continued

No	Country	Hofstede IDV (individualism-collectivism)	IEF Index of Economic Freedom 2018 (Heritage Foundation)		EGDI eGovernment index (United Nations) 2018 DATA		GCI Global Creativity Index - 2015 DATA		CPI Corruptions Perception Index 2018 (Transparency International)	
			Rank	#s	Rank	#s	Rank	#s	Rank	#s
38	Romania	30	19	69.4	67	0.6671	68	0.425	61	47
39	Russia	39	41	58.2	32	0.7969	NA	NA	138	28
40	Serbia	25	37	62.5	49	0.7155	54	0.484	87	39
41	Singapore	20	2	88.8	7	0.8812	9	0.896	3	85
42	South Africa	65	4	63	68	0.6618	39	0.564	73	43
43	Sweden	71	8	76.3	5	0.8882	7	0.915	3	85
44	Switzerland	68	1	81.7	15	0.852	16	0.822	3	85
45	Thailand	20	12	67.1	73	0.6543	82	0.365	99	36
46	Turkey	37	28	65.4	53	0.7112	88	0.348	78	41
47	Ukraine	25	44	51.9	82	0.6165	45	0.518	120	32
48	United Kingdom	89	4	78	4	0.8999	12	0.881	11	80
49	United States	91	2	75.7	11	0.8769	2	0.95	22	71
50	Zimbabwe	-	44	44	146	0.3692	131	0.113	160	22
	CMC-GI (assigned one country – number of + 5 members)									
51	Moldova	-	40	58.4	69	0.659	105	0.256	117	33

As it can be observed data was not available in all cases, so the Index could not be calculated. However, grouping the countries for which calculations have been made, we obtain the following results:

NCI	Average NCI	GDP - Mil $	Population	Average per capita GDP US$/ capita
0.3-0.55	0.45	33,151,059	585,157,597	56,653
0.1-0.3	0.16	8,785,588	225,595,522	38,944
<0.1	0.03	23,471,279	3,739,882,445	6,276

In our case, the number of countries in the first two categories is similar to those in the third one.

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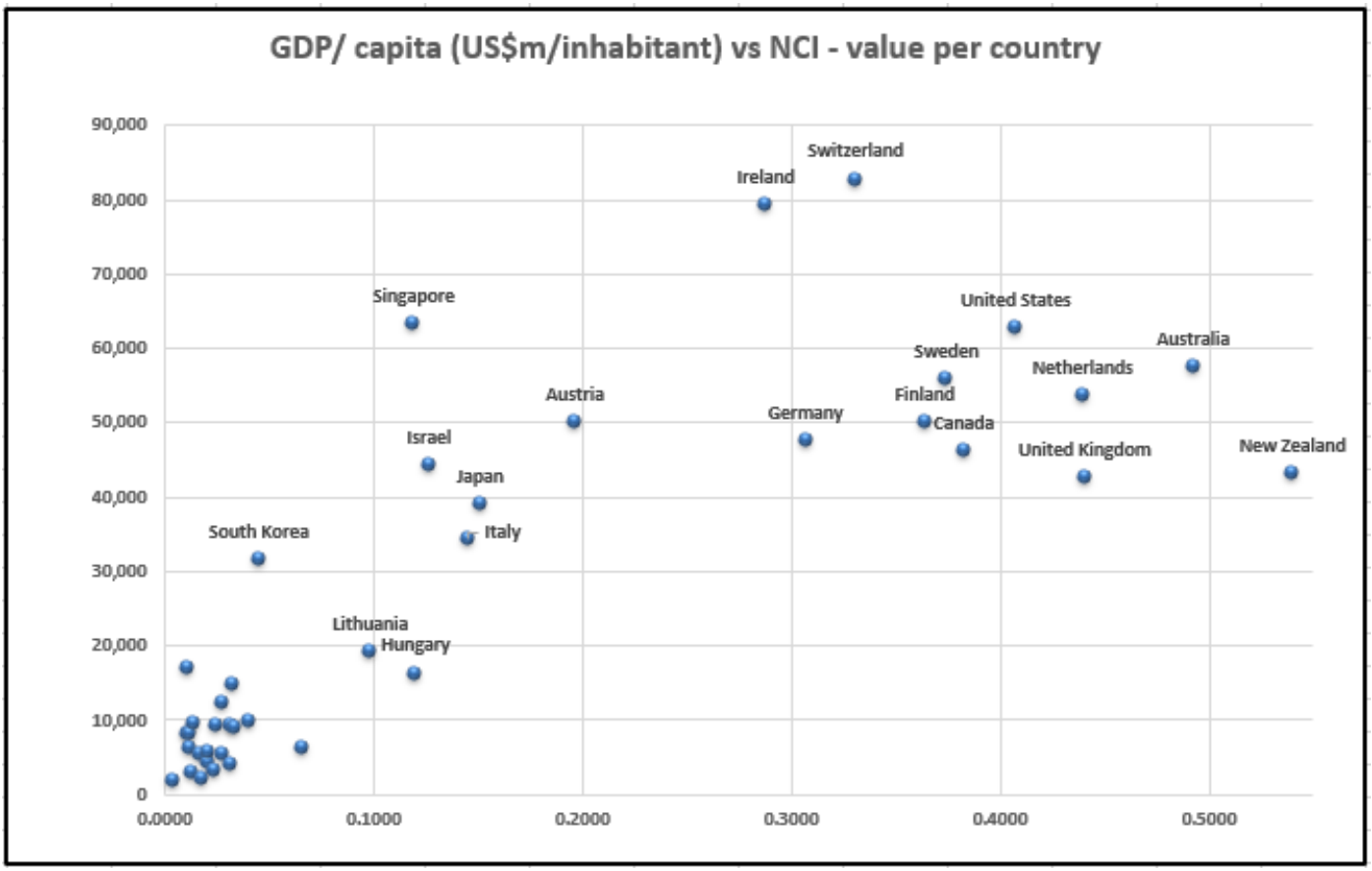
It is obvious that the level of the index is influenced by a number of factors which are not related to the size of the economy or country, such as politics, culture, historical heritage, but it is obvious that an index higher than 0.1 may be a good target to follow and our vision, as ICMCI, to be a leader in the development of management consulting as a global profession that drives social and economic success, is looking in same direction.

Now it`s the role for each national institute to understand and use the NCI tool, in relationship with the business environment, policy makers and general users, in order to support further development of our profession for the full benefit of economy and society.

The results of the NCI and GDP/capita index calculations for each country are presented in the following chart:



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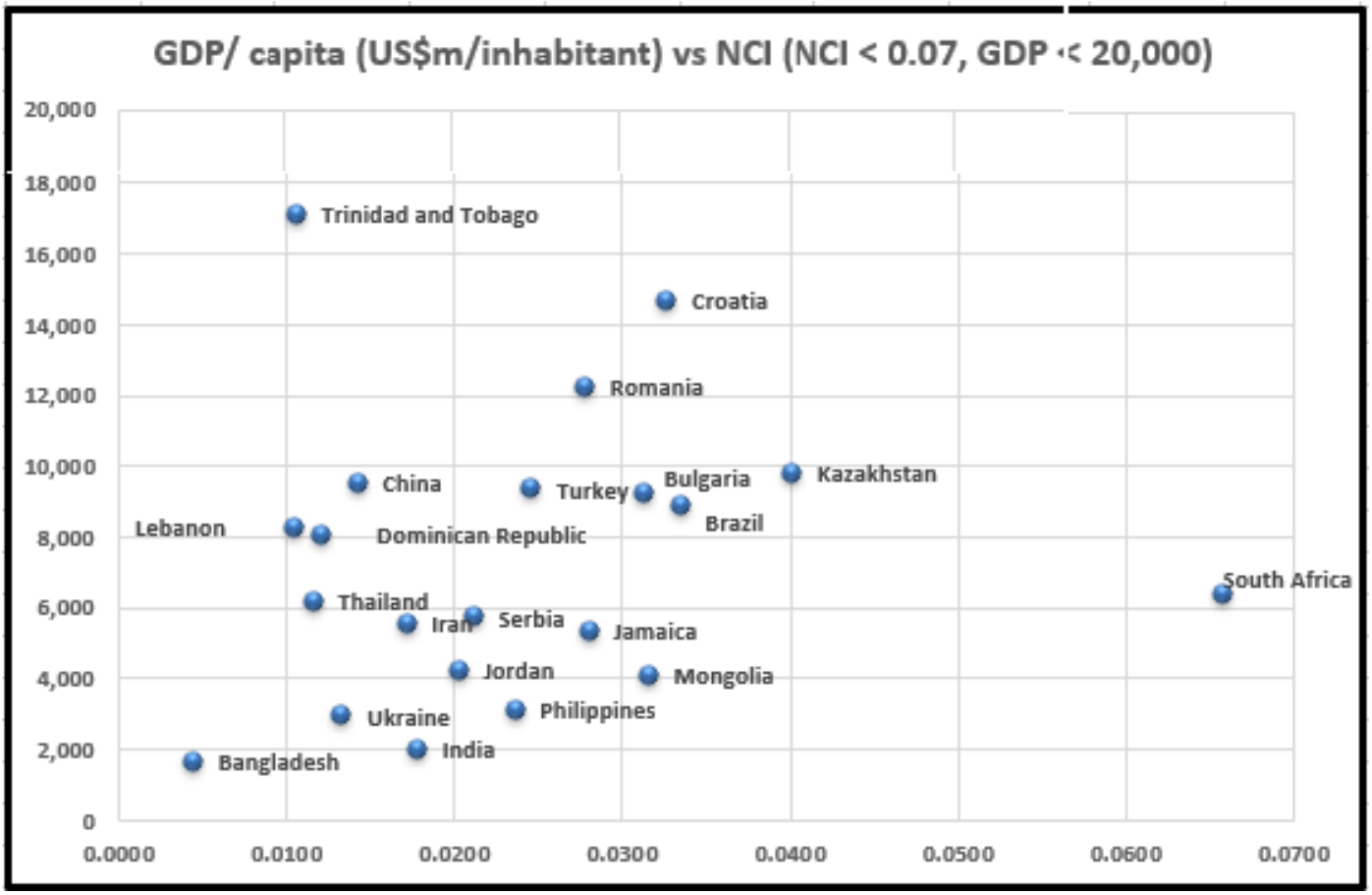
For a more detailed view of the values, the following graph presents the countries with a value of the NCI of less than 0,07 and the Gross Domestic Product of less than 20,000 m$/inhabitant (the left small corner of the previous chart).



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