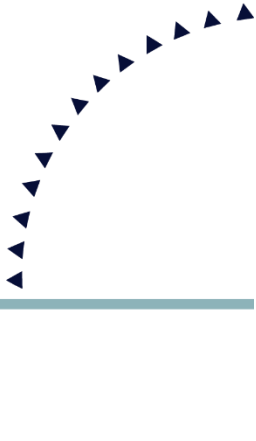
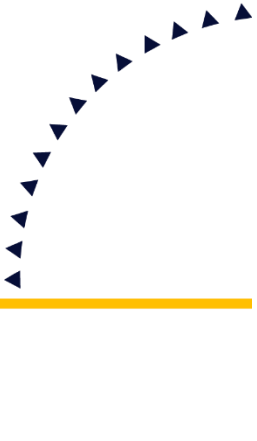


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CMC - GLOBAL

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NATIONAL CONSULTING INDEX 2020 SPECIAL CORONA EDITION

Tamara Abdel-Jaber, Gergana Mantarkova, Simon Haslam,
Robert Bodenstein

2020 AND 2021: NOT BUSINESS AS USUAL

2020 has been an exceptional year. The pandemic has changed our lives and the economic situation on a global level.

While the national consulting index usually looks at the past this year the NCI dares to look in the future.



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APPROACH AND METHODOLOGY

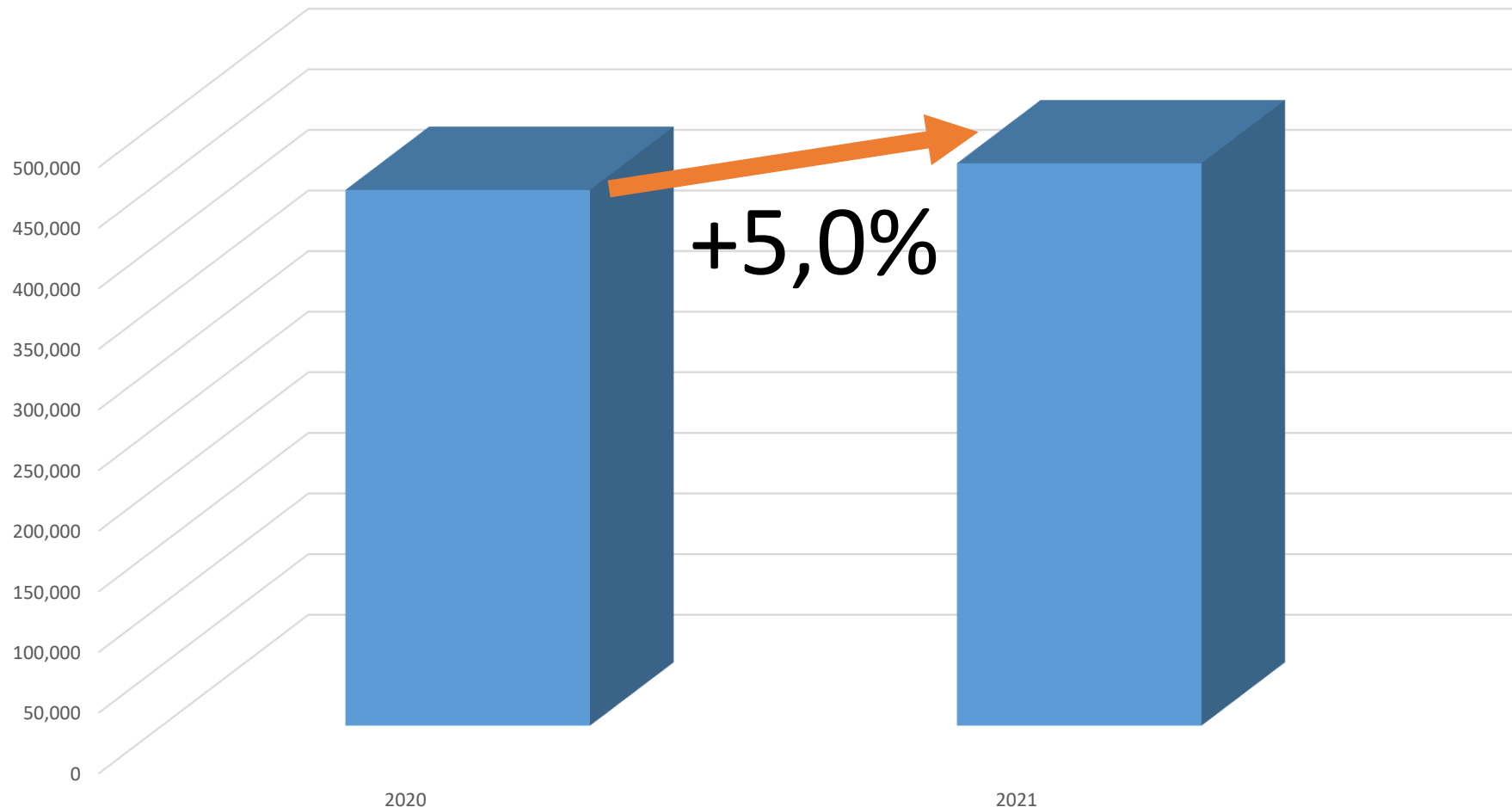
Despite to previous NCI Approach the NCI Corona Edition is based on a survey among the

ICMCI Members:

- What is your estimate of the size (US Dollars) of your country's management consulting sector in 2020?
- What is your prediction of the size (US Dollars) of your country's management consulting sector in 2021?
- What is the reason for any changes in market size between 2020 and 2021?

THE PREDICTED GLOBAL GROWTH

Predicted growth of management consulting revenues in ICMCI members
(As per 35 responding institutes)

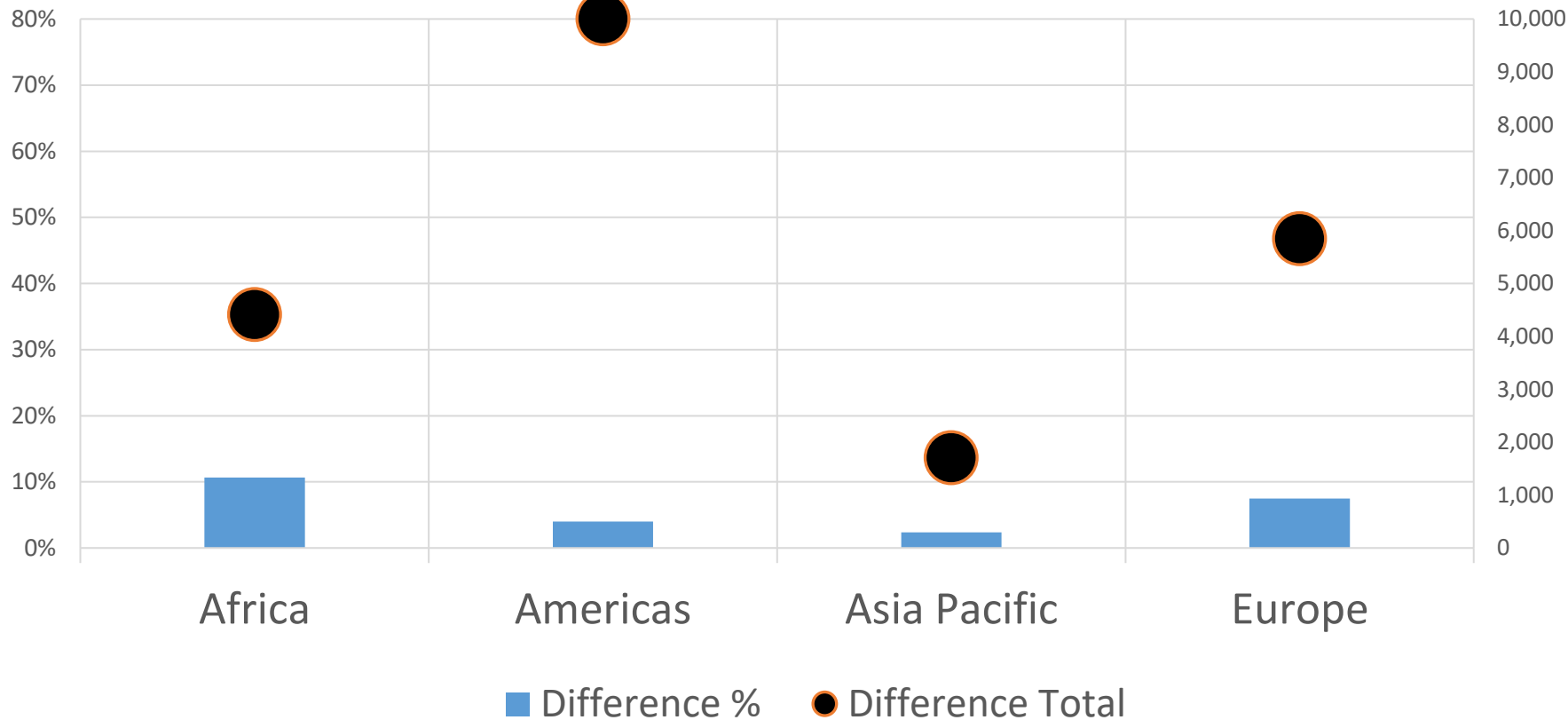


- 35 responding IMCs
- Variance from -60% to +42,9%
- Revenues 2020 in Million USD as reported from IMCs
- The definition of Revenues is not compatible with previous NCI Definitions.



THE PREDICTED GROWTH PER HUB

Estimated Change of Revenues per Hub (Total and %)

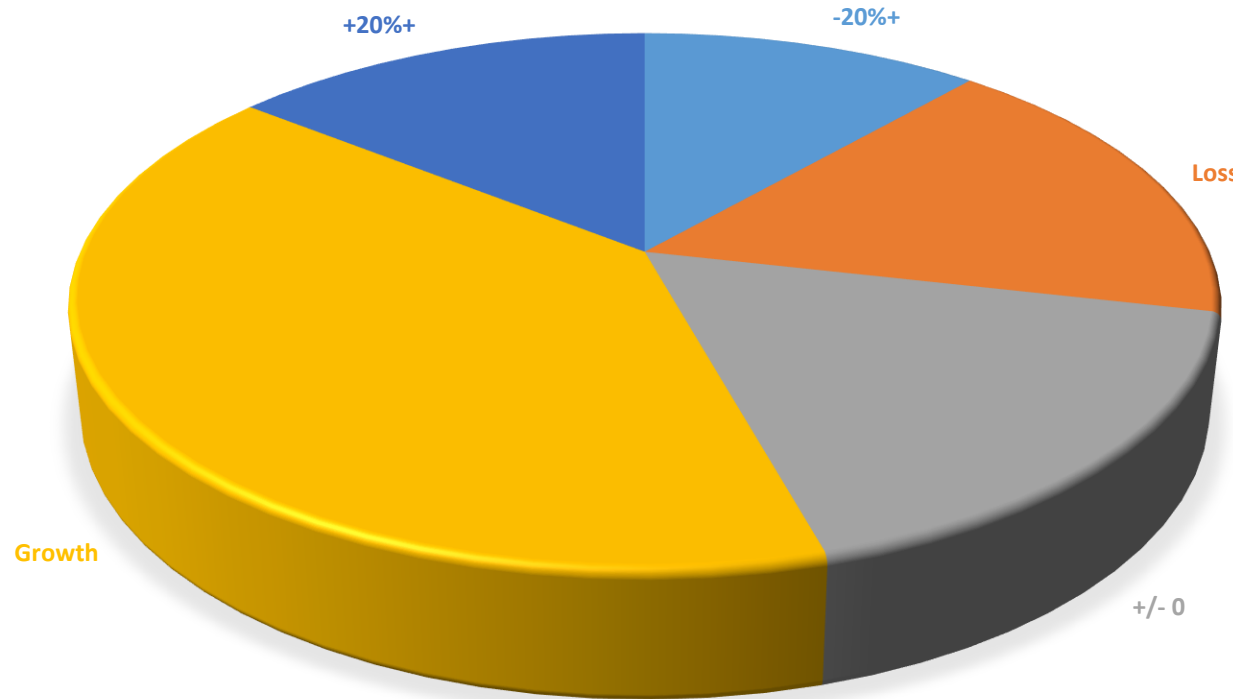


- 35 responding IMCs
- Americas hub: US only
- Total in Million USD



GROUPING OF COUNTRIES

GROUPING BY GROWTH / LOSS



- 35 responding IMCs
- Grouping by
 - Growth
 - Loss
 - No changes
 - High growth
 - High loss

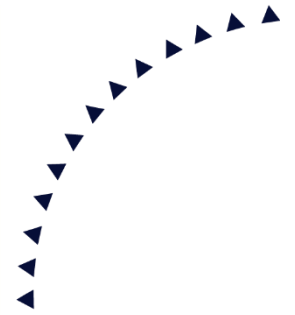
- **Collectively, the countries were predicting a 5% increase over the previous year (2020).**
- **Seventeen of these 35 countries were anticipating a rise in their national management consulting market from 2020 to 2021**
- **In terms of those countries with large (\$10bn+) national management consulting sectors**
5 Countries are expecting a rise. Australia is expecting a small reduction.

CONCLUSIONS

- **Larger national management consulting markets are more positive about immediate future prospects post pandemic.**
- **There is great variability about future management consulting market prospects post pandemic among those countries with smaller management consulting markets. This is slightly different to the NCI comment (a country's overall management consulting market is a function of NCI and GDP).**



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Discussion – Q&A

