

Report Summary

Strategy Consulting Marketplace: Key Data, Trends & Forecasts

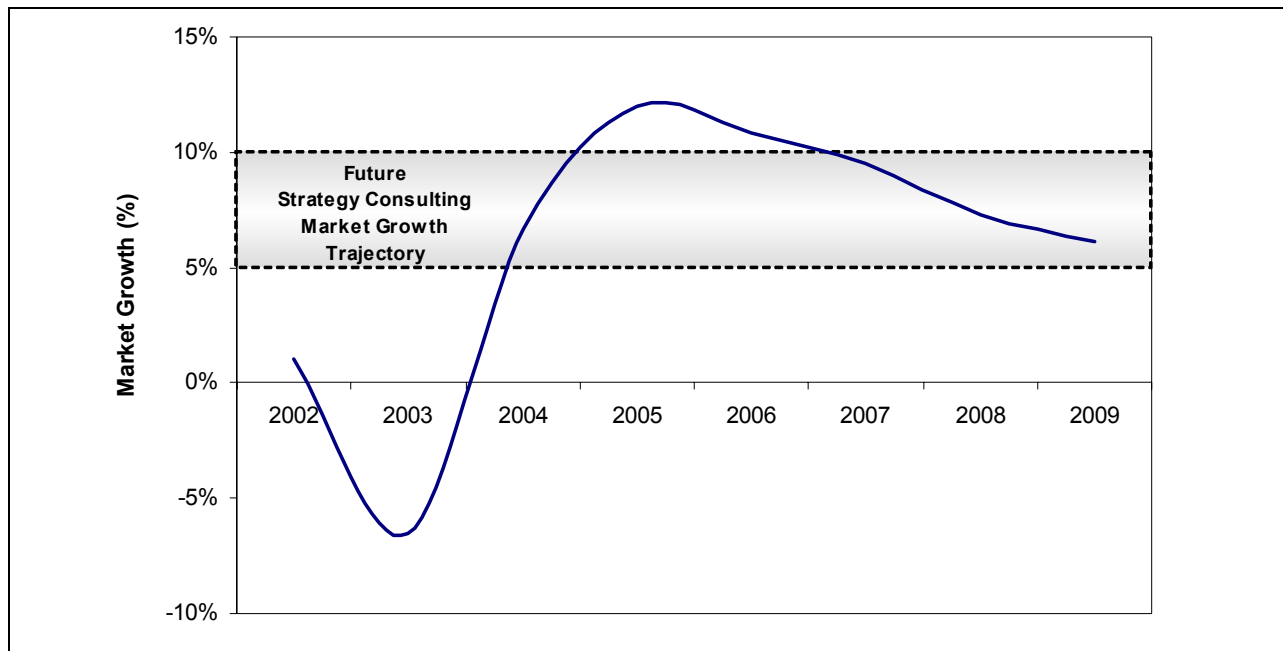


By: Damien Blenkinsopp, Senior Analyst

Strategy is back and booming in 2006. The client drive for profitable growth and the traction of newer services with clients has placed strategy back at the forefront of client mind share.

In the last year strategy consulting returned to strong growth after the sharp depression in 2003. Kennedy expects the strategy market to continue strong in the next years and maintain a growth trajectory between 5 and 10% going forward. The profession's lofty growth rates of the 90s of 15% or more are past, however. The outlook is positive, but moderately so. Nonetheless strategy consulting is expected to grow faster than the overall management consulting market, outpacing the growth of operations management, IT, and HR consulting service lines. As a consequence Kennedy forecasts strategy to increase its share of the global consulting market from 2005 to 2009.

Figure 1. Strategy Consulting Market Growth 2002-2009



Source: *Strategy Consulting Marketplace: Key Data, Trends & Forecasts*, © Kennedy Information

Strategy Consulting Marketplace: Key Data, Trends & Forecasts is the industry's most extensive coverage of the strategy consulting market available. Kennedy Information's research provides a broad set of robust data on market size, growth forecasts and the active firms, including profiles on some of the most prominent strategy practices globally by scale and strength of offering. The study goes beyond the largest players of over \$200 million in size to look at midsize practices where numerous firms are prospering through the strength of their niche propositions. Behind the market data, complete qualitative analysis is provided on the key trends and factors driving the market and shaping the consulting provider landscape. The information is invaluable for clients to identify and

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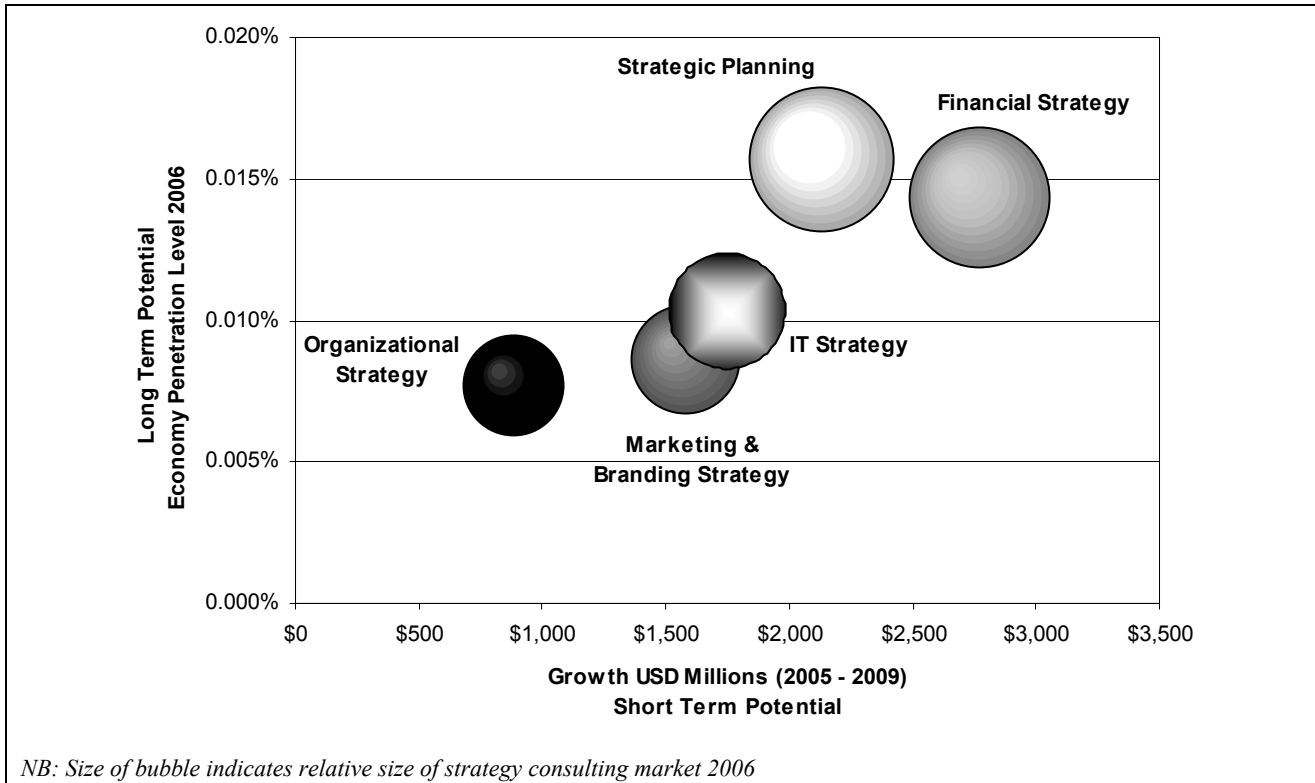
assess leading and ascendant strategy providers. Consultancies can identify the most relevant opportunities to pursue and benchmark their firm's activities against competitors.

Market Opportunities and Challenges

The report provides a comprehensive evaluation of the landscape and calls out the most salient opportunities and challenges that firms and their clients will face in the next few years. Coverage includes the following areas:

- The broad set of changing requirements from clients and how firms are adapting their propositions to meet these needs
- Where nexuses of high-demand services are driving competitive intensity
- Geographic market opportunities highlighting:
 - High growth emerging regional markets
 - Historically underperforming country markets experiencing accelerating services uptake
- Specific service market opportunities highlighting:
 - Current service hot spots and their long term potential
 - Which services are gaining greatest traction in client markets

Figure 2. Short / Long Term Potential Matrix for Strategy Consulting Sub-Segments



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Consulting Landscape

Whilst the prospects are good for firms in the market, the environment is also a lot tougher.

“The changing [strength of firms] has more to do with changes of client buying behavior than competitor behavior. Everyone is trying to adapt [to client changes]. There is nothing game changing – there are relatively little big ideas right now.”

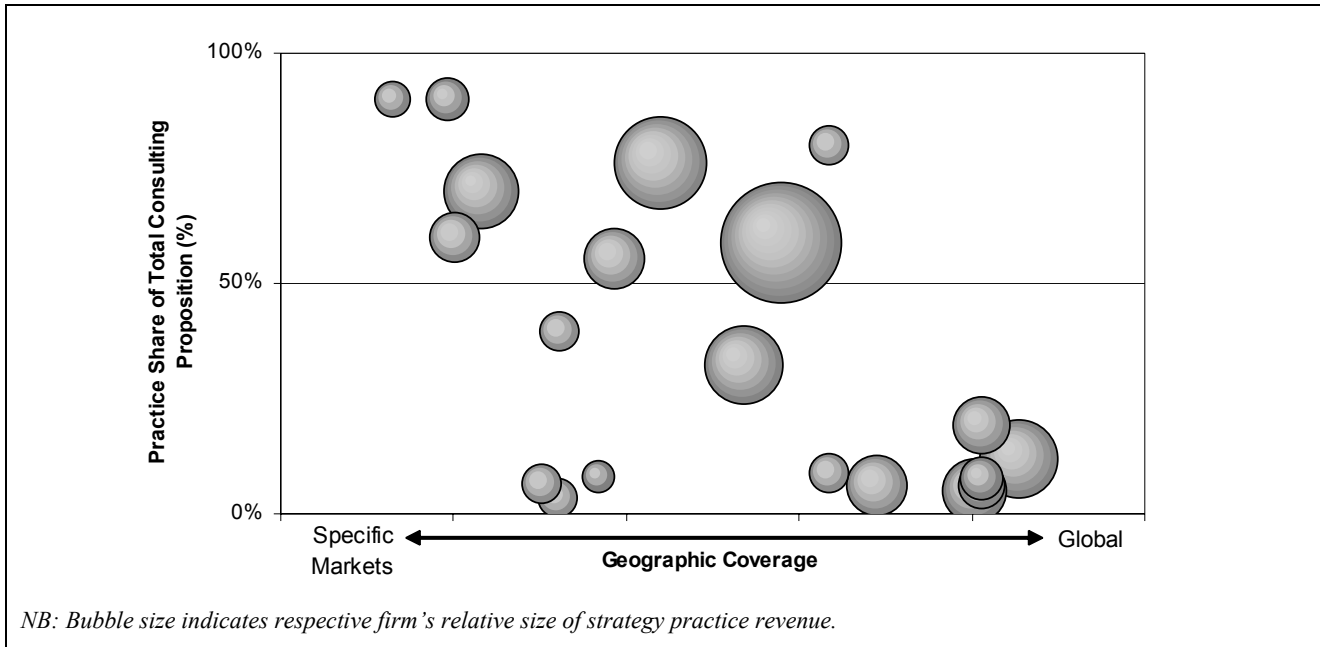
- Ron Langford, Head of Asia Pacific, Marakon Associates

There hasn't been such a broad backdrop of changes in client demands in the area of strategy for nearly a decade. Firms have and are still struggling to keep up with and meet these demands. The consultancies that have been more successful at adapting to various changes in client demands have reaped the greatest benefits --- certainly towards the end of the consulting depression, and just as much now. Other firms which have not adjusted as well to these changing demands have moved through a tumultuous few years, starting with the consulting depression, and now in some cases stalling the recovery of their strategy practices in an otherwise booming market.

Kennedy's report provides detailed coverage of the competitive landscape in strategy consulting. In addition to analyzing the performance of top strategy practices (See figure 3), the report examines:

- Rankings of the top 20 midsize practices by revenue; the highest and lowest growth practices from 2003 – 2006; and analysis of the top 10 firms in each strategy sub-segment
- The re-emergence of the Big Four and other Business Advisory Services firms, as well as where and how their value propositions relate to and compete in strategy consulting
- Evaluation of leading firms and competitive distinctions in each strategy service sub-segment (IT strategy, financial strategy, organizational strategy, strategic planning, marketing and branding strategy), as well as by client industry

Figure 32. Top 20 Strategy Practices Globally



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Firms Profiled and Featured in the Report

Kennedy Information evaluated over 100 firms evaluated in its research, of which the largest forty practices globally receive full coverage in the report. In addition, detailed profiles are provided on over twenty of the most prominent strategy practices.

Strategy Practices Featured			
A. T. Kearney	Corporate	IBM Global	OC&C Consulting
Accenture	Executive Board	Business	Oracle Consulting
Altran	Corporate Value	Services	Ovum
Technologies	Associates	IDC	PA Consulting
(Arthur D.	CRA International	IMS Health	Parthenon Group
Little)	CSC	Inductis	PricewaterhouseCoopers
Archstone	Deloitte	Kanbay	Protiviti
Consulting	Diamond	International	PRTM
Atos Origin	Management &	(Adjoined	Roland Berger Strategy
Bain &	Technology	Consulting)	Consultants
Company	Consultants (Ex	KPMG L.E.K.	SAP Consulting
Baker Tilly	DiamondCluster)	Consulting	SRA International
International	Digitas	LogicaCMG	(Touchstone Consulting)
BDO	Droege &	Prophet	Stern Stewart &
International	Company	Management	Company
BearingPoint	Ernst & Young	Consulting	Strategic Decisions
Boeing	Equaterra	Group	Group
Booz Allen	Everest Group	Marakon	TPI
Hamilton	Forrester Group	Associates	Unisys
Boston	Frost & Sullivan	Mars &	ZS Associates
Consulting	Gartner Consulting	Company	
Group	Grant Thornton	McKinsey &	
Capgemini	International	Company	
Compass	HP Consulting	Mercer	
Management		Specialty	
Consulting		Consulting	
		Mitchell	
		Madison	
		Monitor Group	

More About the Strategy Consulting Marketplace Report

Following the Executive Summary and Introduction, the remainder of the report is organized as follows.

SECTION III KEY MARKET TRENDS analyzes the evolution of demand and supply across strategy consulting globally, including analysis of its key drivers and inhibitors, demand trends and the

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supply response of strategy service propositions. This section focuses on pulling together common evolutions from across the globe to give the reader a deeper insight into how demand and services are changing and why.

SECTION IV MARKET PROSPECTS 2005 – 2009 examines the key insights and trends that emerged during the course of the study. It is divided into three sub-sections:

- Market prospects by strategy service line sub-segment (Strategic planning, financial strategy, organizational strategy, IT strategy, marketing and branding strategy)
- Market prospects by geographic region
- Market prospects by client industry segment

SECTION V THE CONSULTING LANDSCAPE conveys analysis on two levels: the largest trends affecting the consulting industry as a whole and detailed analysis of the pertinent individual firm segment trends. Analysis covers:

- Market demographics
- Competitive positioning
- Trends in competition (structural change and competitive dynamics)
- Firm strategy practice activity size estimates and rankings
- Highlights of some of the firms

SECTION VI PROFILES OF KEY PLAYERS contains profiles of some of the most prominent strategy firms and strategy practices globally. As far as possible, the profiles provide financial data, geographical coverage, capabilities analysis, service and industry emphasis, and the latest developments and insights relevant to their operations in the region.

SECTIONS VII METHODOLOGY includes more information about Kennedy Information's research process and guiding definitions.

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Kennedy Information, Inc.
Peterborough, New Hampshire, USA
Telephone: +1.603.924.0900 ext. 628 | Facsimile: +1.603.924.4460
research@kennedyinfo.com | www.ConsultingCentral.com

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