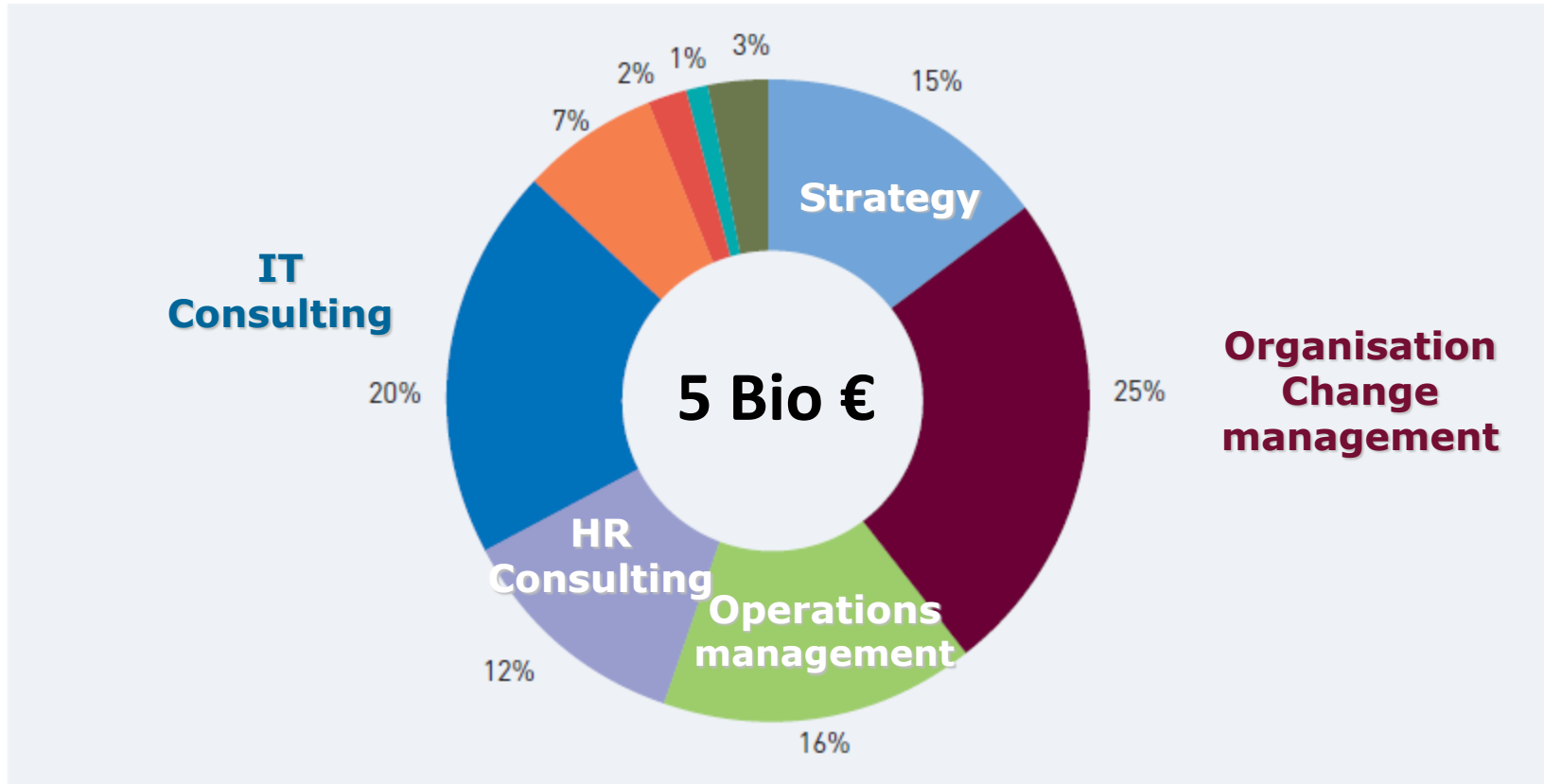


# Management Consultancy in France

Results 2012/2013



# Split of the french market by services lines in 2012



Conseil en stratégie

Organisation

Efficacité

Conseil RH

Conseil SI

Optimisation

Conseil en innovation

Conseil en développement durable

Autres

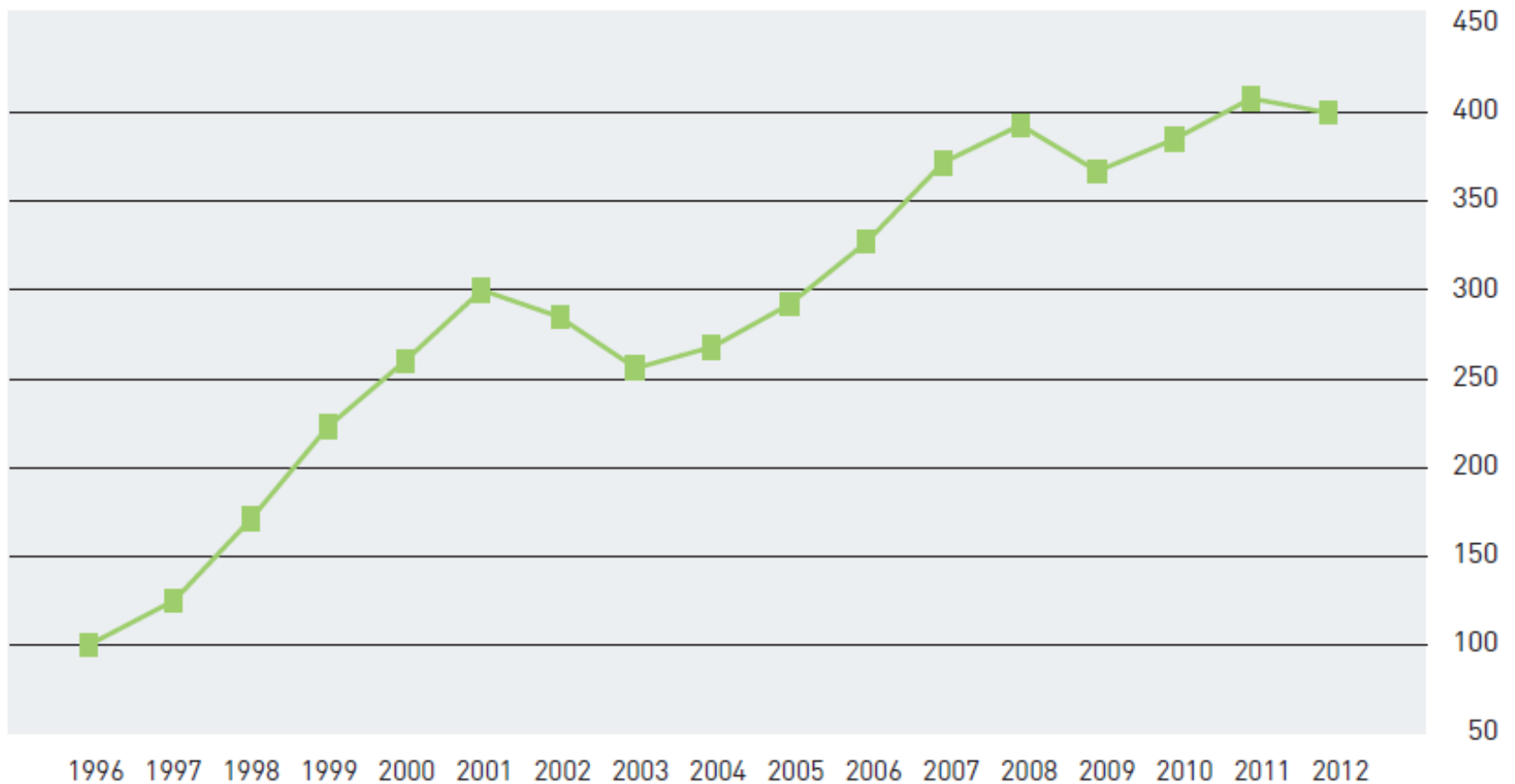
# Evolution of the french MC-market 2012/11 : -1,9%



SYNTEC Conseil  
en Management

Evolution 2012/11 of the French GDP : 0%

Base 100 en 1996



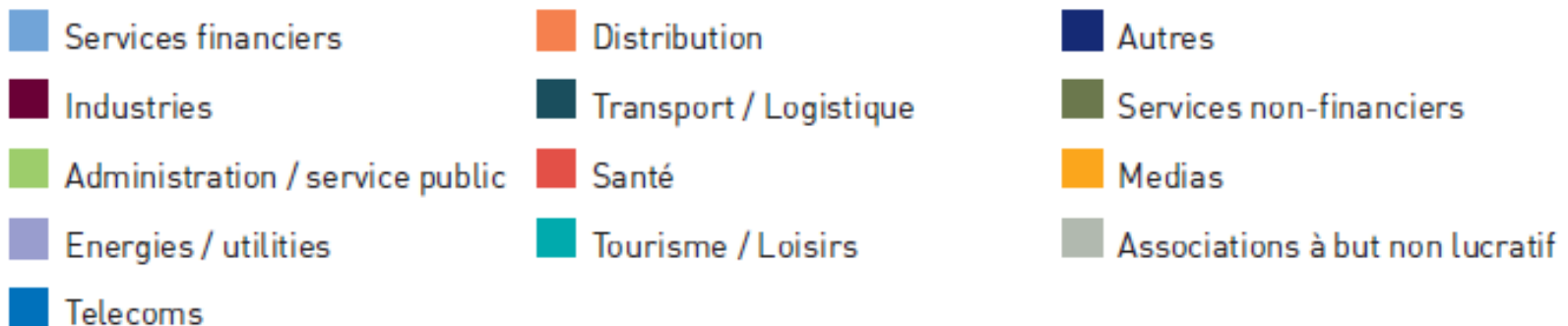
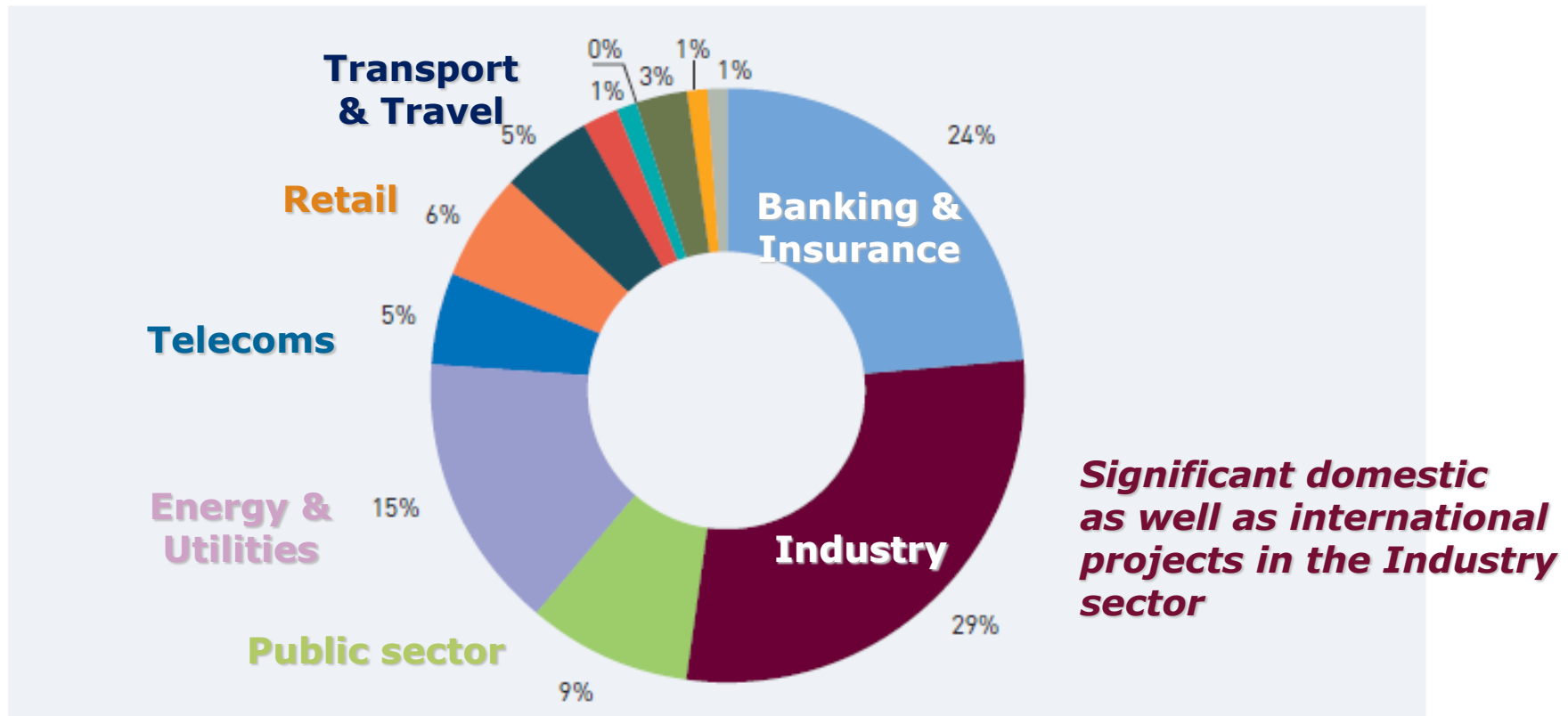
# Dispersion of growth rate 2012/11 (by company size)



## Market Share

	2010	2011	2012
Daily rates > 1500€	25%	23%	23%
<b>1000€ &lt;&gt; 1500€</b>	59%	59%	58%
Daily rates < 1000€	17%	19%	19%

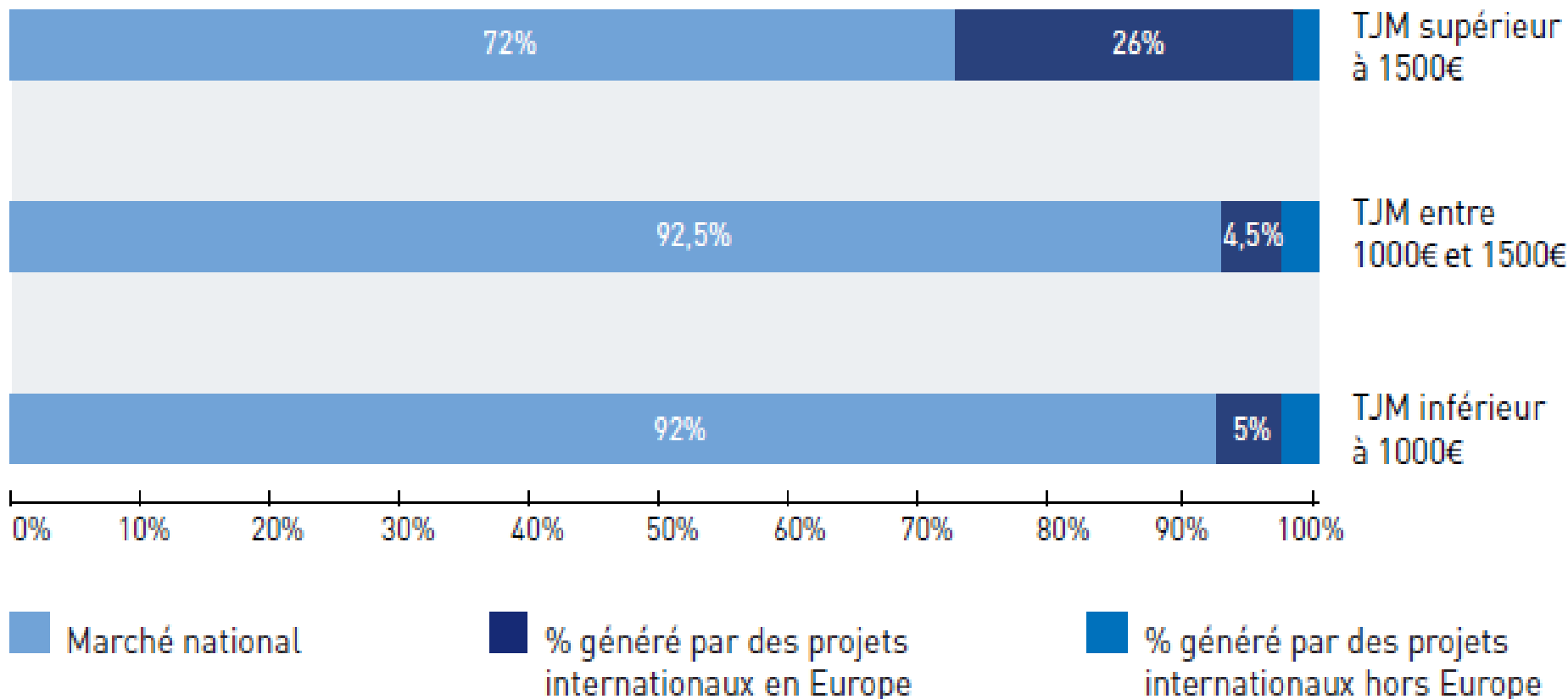
# Split of the french market by sectors in 2012



# Export of MC french market in 2012 : 10% in average



SYNTEC Conseil  
en Management



## **A PROFESSION THAT RECRUITS**

Human resources are the main challenge for the future of the profession. Despite the crisis, management consulting is an industry that recruits. If the total workforce increased by only 0.2% in 2012, the "turnover" (staff turnover to compensate for departures) which had declined sharply in late 2012, rises again in 2013. Most consulting firms have recruitment plans for 2013 especially for young graduates.

## **THE NEED FOR INNOVATION**

To remain in the competition, consulting firms have to strengthen their innovation potential. They have almost all put in place a structure for R & D. They often partner with business schools and universities, or have incorporated researchers into their processes. International networks are also good ways to interact with partners in other countries and get access to innovative tools.

## **THE GROWING IMPORTANCE OF INTERNATIONALIZATION**

Consulting firms are now seeking growth where the economy is growing, which implies a development outside the traditional areas of French influence. If the big players in the industry have not waited for the crisis, some medium-sized firms successfully test of association and international networking formulas. For these companies engaged in networks, the part of international activity is higher (15% in proportion of their domestic activity and up to 28% for the assets).