



ASOCOCONSULT
Associazione Federativa
Imprese di Consulenza
Direzionale e Organizzativa

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Convegno

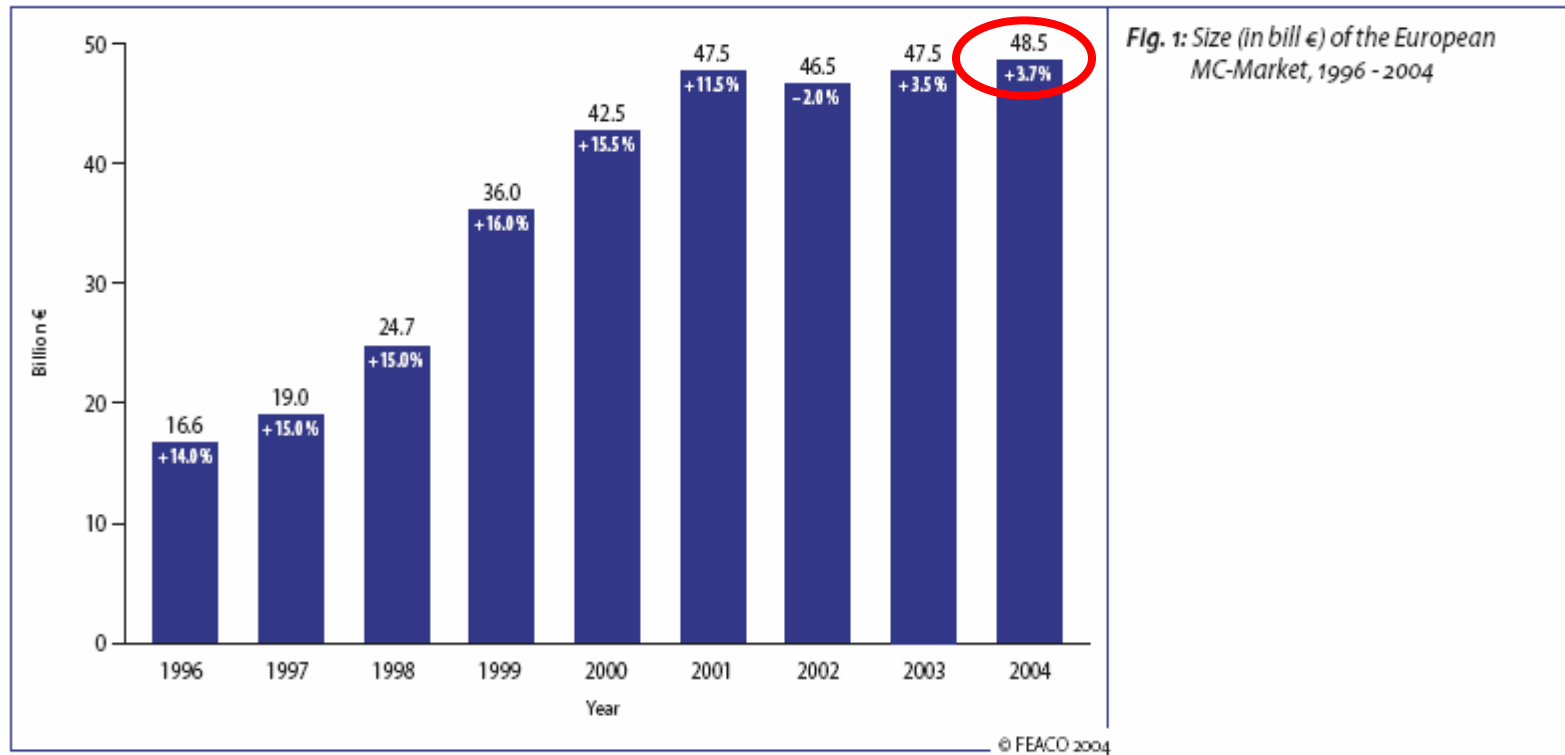
**“La consulenza per il cambiamento
della Pubblica Amministrazione:
spreco o risorsa ?”**

Il mercato della consulenza

Giovanni Colucci
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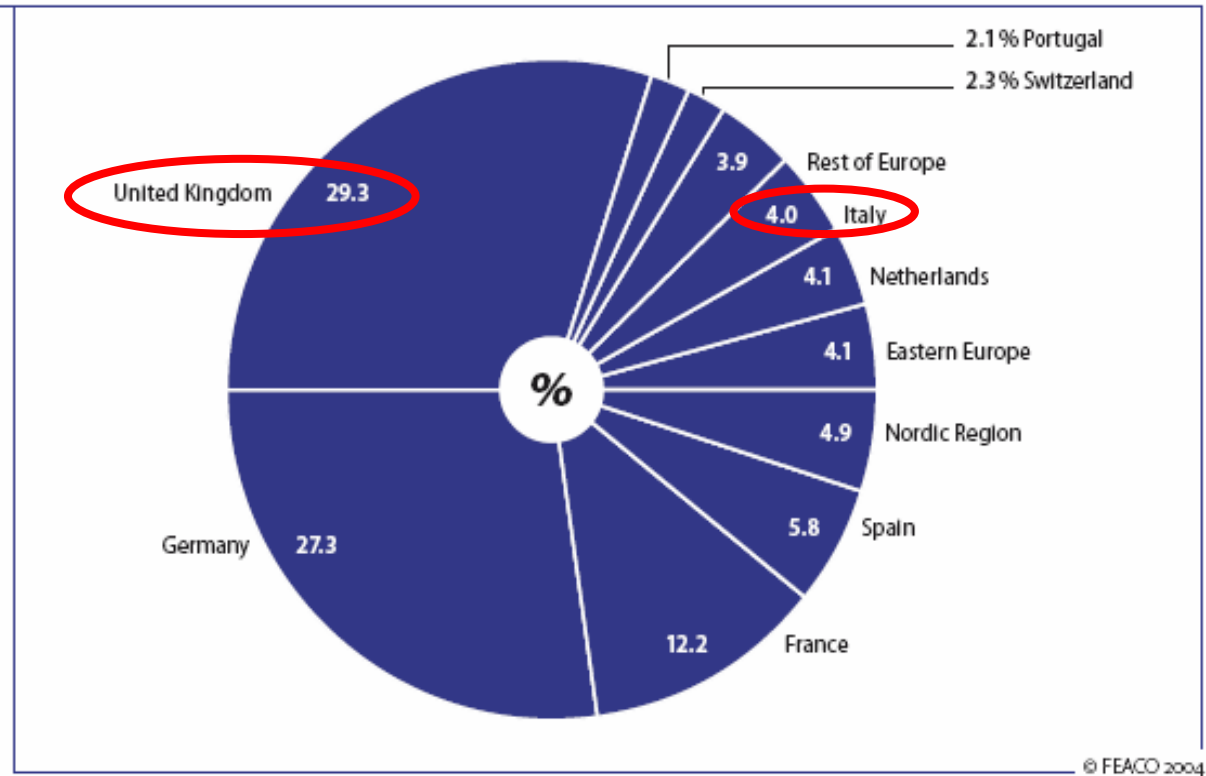
Dimensioni e trend in Europa



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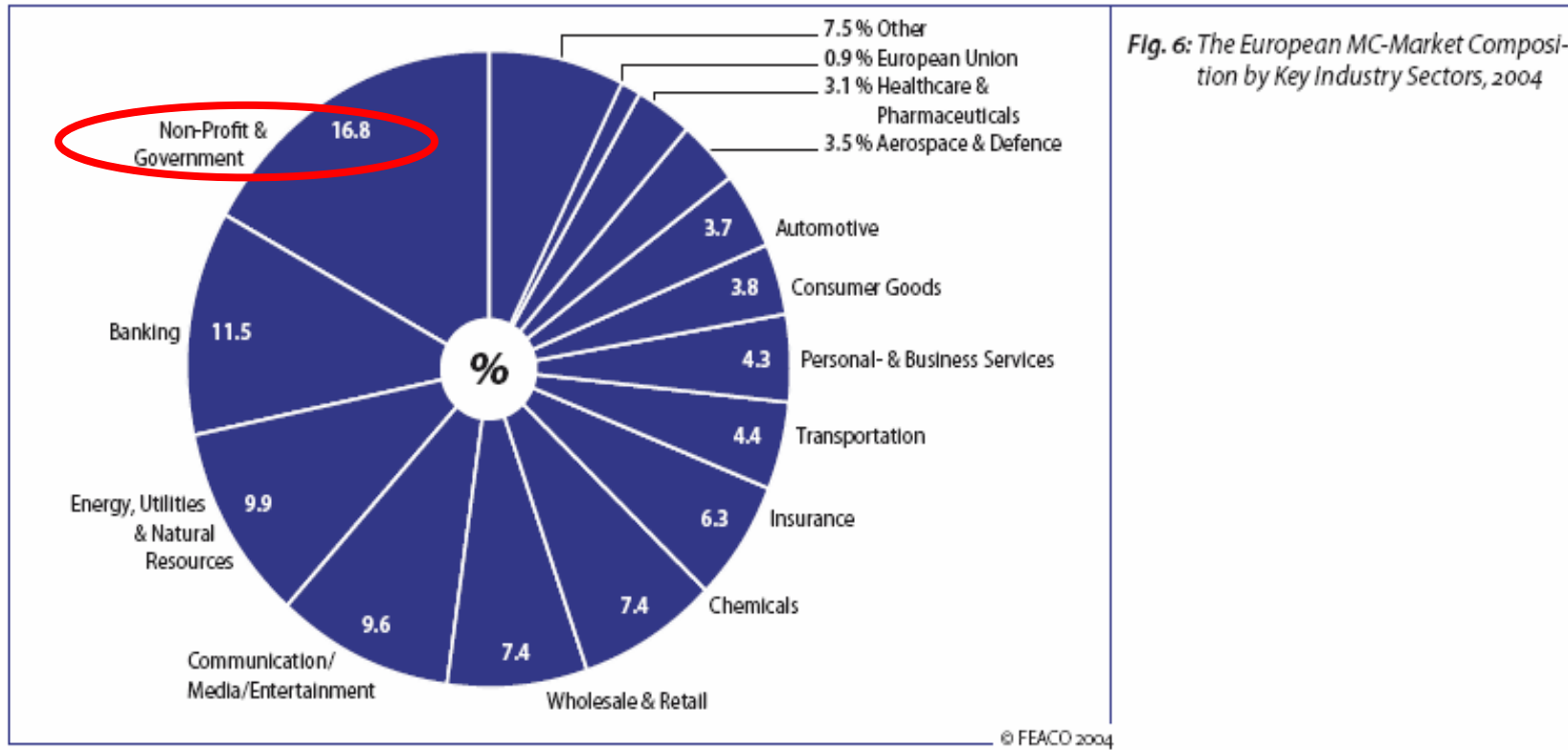
I mercati nazionali

Fig. 3: The European MC-Market
Composition by Country/Region,
2004



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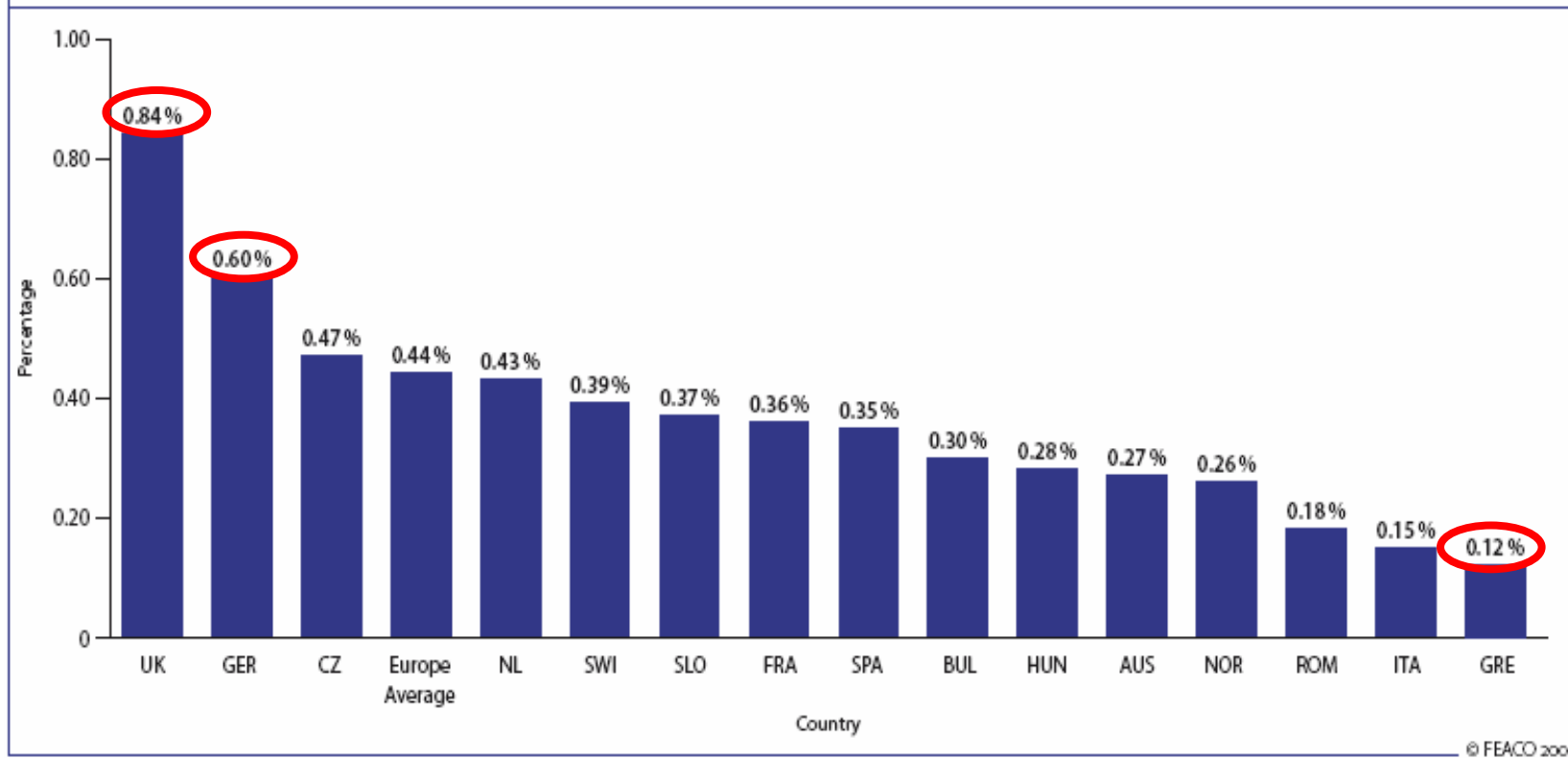
I settori di riferimento



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Dimensioni in rapporto al PIL nazionale

Fig. 8: Management Consulting as a Percentage of the Gross Domestic Product (GDP), 2004



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Caratteristiche dei mercati nazionali

Tab. 5: Key Figures of Selected European MC-Markets, 2004

Country	Total Turnover in Management Consulting (million €)	Management Consulting Market Growth 2004	% of the total Management Consulting Market in Europe	Gross Domestic Product (GDP) (million €)	% of the total Economy in Europe	GDP Growth 2004	Management Consulting as % of the GDP	Number of MC Companies	Number of Consultants	Turnover per Consultant (€)
UK	14,225	7.2%	29.3%	1,700,000	15.6%	3.1%	0.84%	6,000	52,000	270,000
Germany	13,250	1.0%	27.3%	2,192,000	20.1%	1.6%	0.60%	14,400	67,500	195,000
France	5,900	4.4%	12.2%	1,636,000	15.0%	2.3%	0.36%	5,500	30,000	195,000
Spain	2,800	7.0%	5.8%	791,000	7.3%	3.1%	0.35%	350	40,000	70,000
Netherlands *	2,000	2.0%	4.1%	463,000	4.2%	1.4%	0.43%	3,750	11,000	180,000
Italy	1,950	-3.0%	4.0%	1,341,000	12.3%	1.2%	0.15%	3,000	24,500	80,000
Switzerland	1,120	2.0%	2.3%	286,000	2.6%	1.7%	0.39%	650	5,400	200,000
Portugal	1,020	-13.6%	2.1%	134,000	1.2%	1.0%	0.76%	2,000	11,000	90,000
Austria	640	7.4%	1.3%	234,000	2.1%	2.2%	0.27%	1,000	4,000	160,000
Norway	518	3.0%	1.1%	200,000	1.8%	2.9%	0.26%	600	4,500	115,000
Czech Rep.	400	4.0%	0.8%	86,000	0.8%	4.6%	0.47%	300	8,100	50,000
Hungary	226	5.0%	0.5%	80,000	0.7%	4.2%	0.28%	450	3,500	65,000
Greece	192	-6.0%	0.4%	164,000	1.5%	4.2%	0.12%	150	1,700	110,000
Romania	107	35.0%	0.2%	59,000	0.5%	8.9%	0.18%	550	2,200	50,000
Slovenia	90	10.0%	0.2%	24,600	0.2%	4.0%	0.37%	800	1,350	65,000
Bulgaria	56	7.0%	0.1%	18,400	0.2%	4.0%	0.30%	200	2,800	20,000
Europe	48,500	3.7%	100.0%	10,900,000	100.0%	2.5%	0.44%	60,000	315,000	150,000

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Caratteristiche dei settori nei vari mercati nazionali

Tab. 8: European MC-Markets Composition by Client Industry, 2004

Country	BUL	CZ	GER	GRE	HUN	ITA	NOR	POR	ROM	SLO	SPA	SWI	UK
Energy, Utilities & Natural Resources	6.0%	2.0%	8.4%	6.3%	18.0%	9.0%	7.0%	6.0%	6.0%	16.0%	10.8%	16.0%	11.9%
Chemicals	n.s.	4.0%	9.2%	2.0%	4.0%	5.0%	1.0%	6.0%	3.0%	6.0%	0.3%	4.0%	1.2%
Consumer Goods	14.0%	1.0%	4.2%	14.2%	16.0%	9.0%	6.0%	15.0%	15.0%	15.0%	7.7%	7.0%	1.7%
Automotive	2.0%	20.0%	8.7%	2.0%	5.0%	4.1%	n.s.	3.0%	7.0%	3.0%	1.5%	2.0%	0.8%
Aerospace & Defence	n.s.	8.0%	2.6%	2.0%	n.s.	0.5%	2.0%	1.0%	1.0%	2.0%	1.4%	3.0%	5.7%
Transportation	11.0%	9.0%	6.2%	7.0%	1.0%	2.0%	1.0%	5.0%	4.0%	3.0%	9.2%	6.0%	1.9%
Communication/ Media/ Entertainment	3.0%	4.0%	8.5%	1.7%	11.0%	6.0%	2.0%	3.0%	3.0%	4.0%	18.8%	6.0%	9.9%
Wholesale & Retail	9.0%	1.0%	5.6%	3.0%	4.0%	13.9%	19.0%	11.0%	21.0%	12.0%	3.5%	2.0%	9.3%
Banking	10.0%	15.0%	15.6%	5.0%	11.0%	19.9%	1.0%	6.0%	1.0%	6.0%	18.1%	13.0%	6.1%
Insurance	2.0%	6.0%	7.4%	3.0%	1.0%	4.0%	n.s.	8.0%	4.0%	1.0%	4.1%	5.0%	4.3%
Personal- & Business Services	14.0%	4.0%	3.0%	10.0%	4.0%	3.0%	10.0%	10.0%	7.0%	6.0%	1.1%	1.0%	7.8%
Healthcare & Pharmaceuticals	2.0%	2.0%	3.5%	1.7%	3.0%	5.0%	3.0%	6.0%	2.0%	5.0%	8.9%	6.0%	2.2%
Non-Profit & Government	11.0%	4.0%	9.3%	27.1%	13.0%	12.1%	16.0%	8.0%	9.0%	9.0%	14.6%	22.0%	28.8%
European Union	5.0%	12.0%	1.0%	12.3%	1.0%	0.5%	3.0%	10.0%	15.0%	5.0%	n.s.	n.s.	0.1%
Other	11.0%	8.0%	6.8%	2.7%	8.0%	6.1%	29.0%	2.0%	2.0%	7.0%	n.s.	7.0%	8.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

n.s. = not significant; n.a. = not available

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