

**In the Shadow of American Stars - On American Dominance and the
Americanisation of the Swedish Management Consultancy Field
Staffan Furusten and Jonas Bäcklund**

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Staffan Furusten

Phone int+46 8 674 74 02
E-mail staffan.furusten@score.su.se

Jonas Bäcklund

Phone int+46 8 674 72 73
E-mail jonas.backlund@score.su.se

SCORE
(Stockholm Center for Organizational Research)
Stockholm University
S-106 91 Stockholm
Sweden

Abstract

The last decade has seen an increasing number of firms of US origin enter the Swedish market for management consulting. It has become common to characterize the field as dominated by a few global actors and therefore globalized and homogenized. In this study, the development of the Swedish market is analyzed and the actors are divided into three different categories: Americans, semi-Americans and Swedes. Similarities and differences in terms of seller concentration, product differentiation (what services they offer) and buyer concentration (kinds of clients, their size and where they are located) are analyzed. It is concluded that the global firms of American or semi-American origin do indeed dominate the Swedish market, but they neither constitute a

united category nor are they the largest single group of actors. The Swedish firms, on the other hand, show great resemblance and represent as a group the largest share of the market. It is therefore argued that while tendencies can be seen towards concentration in some aspects, tendencies towards differentiation and local variation are equally evident.

1. Structures on the market for management consulting in Sweden

In discussions concerning management consulting, the firms referred to are often a limited number of American consultancies such as McKinsey & Co, Boston Consulting Group, Andersen Consulting, Ernst & Young, PriceCoopersLybrand and several others. This is the case in academic research and education, the media, and amongst leaders and employees in organisations. These large firms are without doubt important actors in many national markets, but one can question whether the consultation that these firms offer gives a fair picture of the activities in the field as a whole. It is also debatable whether they make up a uniform and comparable category (cf. Hansen et al, 1999). Questions like these appear reasonable considering the average number of employees in European management consultancies has been found to be seven, and that the bulk of collective consultation in Europe is carried out by a myriad of small local firms (Keeble & Schwabach, 1995). In this light, we intend to analyse the structures of the Swedish market for management consulting. The question we ask is if the global actors dominate the Swedish market to that extent that is claimed and if their market dominance in this case contributes to the homogenisation of management consulting practices.

Market Dominance and Homogenisation?

An important argument in modern organisation literature is that organisations that dominate an organisational field also establish norms and standards that other actors in the field adapts (DiMaggio & Powell, 1983/1991). The concept of an organisational field includes the networks of buyers and sellers of any specific product or service, other actors who produce similar goods or services, and regulating instances that establish laws and standards for the activity the producers and consumers of these goods and services must comply with. The management consulting field is unregulated in the sense that national controlled regulation of the field is limited to the law of public tender, which expresses rules for how public organisations may purchase goods and services. This means that the other actors in the field are given a substantial freedom to establish norms and standards to regulate what a management consulting service should look like, what it should contain, and how it should be carried out. In this context the global firms may be assumed to play an important role due to their size and visibility, and it is possible that they are being imitated as an example of how to be successful, thereby acting as role models for professional consulting. If this holds true, then market dominance of a few actors makes the activities in the field increasingly homogenised. The management consulting field, however, is complex in the sense that varying assumptions exists both in literature and practice with regard to what management consulting really represents (Kubr, 1996; Furusten, 1999b). This makes comparisons of companies more difficult. At

an aggregated level, the structure of the field may be studied and comparisons can be made between different types of consultants.

Through empirical analyses of who the actors are, what services different categories of firms offer, and where the seller and buyer relations are located, this paper will contribute to an increased understanding of both the conditions in management consulting and how non-regulated fields are structured. In addition, with this as a starting point, conclusions can be drawn regarding what direction the development is taking and we hope to contribute to theories on convergence and variation in the organisational field. To study this, however, we need to operationalise the concept of management consulting, what is being analysed, as well as homogeneity.

Management consulting

In the literature, management consultants are described with notions as diverse organisational therapist (Schein, 1988), agents of change (Greiner & Metzger, 1983), experts (Gummensson, 1991), diffusers of ideology (Barley & Kunda, 1992), organisational whichdoctors (Clark & Salaman, 1996) or even merchants in words (Czarniawska-Joerges, 1988). It is quite common, also to distinguish between method and process consultants (cf Kubr, 1996). Differences have been identified between the type of consulting carried out by the five British-American consulting firms (Ernst & Young, PriceWaterhouseCoopers, KPMG, Andersen Consulting and Deloitte & Touche) and American strategy consultants such as McKinsey, Boston Consulting Group (BCG) and Arthur D Little (Hansen et al., 1999). Moreover, in practice, consultants have been described as everything from speaking partners and external resources to brokers of experience, experts and drivers of quality development (Furusten 1999b). It is reasonable to say that little consensus prevails regarding what a management consultant is and what is included in the concept of management consulting. We deal with this complexity by considering the firms that are listed in *Konsultguiden's* yearly rating of consulting firms in Sweden. In this rating lists of different kinds of consultancies are presented and the firms are categorised according to what the majority (over 50%) of their turnover is derived from. The firms on this list consequently consider themselves as primarily consultants in management. This means that firms that are mainly involved in, for example, recruitment and personnel issues (Human Resource Management), IT or the temporary employee business (temps) are not categorised as management consultants, even if that excludes the firms that also offer this service (the reverse may also be true).

Concentration and homogeneity

When analysing homogeneity, notions such as isomorphism (DiMaggio & Powell, 1992/1983) and conformity are often used (Meyer & Rowan, 1977). Distinguishing between what in a field becomes alike is actualised by the observation that in many organisations talk tends to be de-coupled from action (Brunsson, 1989). Instead, it is argued that de-coupling between the formal organisation and practice may very well occur (Meyer & Rowan, 1977). Thus, while de-coupling may happen, it does not always mean isolation between how things are presented and how things are done. Studies have shown, for example,

that organisational models and management recipes are likely to be translated during their journey between individuals, organisations and societies (Czarniawska & Jeorges, 1996). Ideas and models are also likely to be translated in chains over and over again as they make their way from, for example, a book, a consultant or a buyer of management consultancy services, and are converted into practice in a department or a unit of an organisation (Røvik, 1998). Thus, what is left of ideas or “superstandards” in practice is described as a mixture of different standards, where fragments of different recipes are sedimented and melted together (ibid.). Hence, what is actually left of a standard is far from obvious, even if it is presented as being a standard of one of the global American management consultancies. This implies that even if a field appears to be homogenate in certain aspects, this may not be the case when the collective activities in the field are considered. Notions such as conformity and homogenisation make claims over time. Conformity is intended to describe similarities in organisational forms (DiMaggio & Powell, 1983/19991). The empirical findings that this study is based on, however, do not span over time and are not meant for comparisons of organisational forms. For these reasons, notions such as similarities and dissimilarities will be used to analyse the empirical material. To be able to draw conclusions on the state of the Swedish management consulting field, we therefore need to specify a few variables whose similarities and dissimilarities can be studied in detail.

To describe the market, we use structure variables such as concentration of sellers, product differentiation and buyer concentration (see Caves, 1987). Seller concentration is analysed by categorising consulting firms with regard to their national origin. Product differentiation is analysed by studying the types of services different categories of consulting firms offer, while buyer concentration is studied by analysing the clients’ industry sector, size, and geographical location. By comparing different categories of consultants in terms of these variables, it will be possible to discuss the aspects of the market that show similarities and dissimilarities. The model of analysis is presented in figure 1.

Table 1. Categories of consulting firms and their profiles.

	Type of Service	Type of Clients	Location of Clients
Nationality			
Category A			
Category B			

Methodology

We have used two main sources of data for this study: (1) the industry statistics gathered and published yearly in *Konsultguiden* since 1986, which includes a commentary on what has happened during the past year (see above), and (2) our own survey of the top sixty firms of *Konsultguidens* 1998 list. This listing contained data on size, type of services, and more general information on client categories.

In our own survey, we searched for additional information on more specific client attributes in terms of industry size, and location. It is important to note that there is a certain fall out in the *Konsultguiden* statistic in that only consulting firms with a yearly turnover above a certain level (SEK 10 million in 1998) were included. Further more, some firms, for some reason, chose not to be included on the list, and consequently, this list does not give a complete picture of the entire field in Sweden. In terms of the larger actors, the list does, however, give an almost complete picture, but it has shortcomings and must be dealt with accordingly. In the 1998 version of the guide the list comprised 60 consulting firms, and on the guide's web site an additional 30 firms, with a turnover below the indicated level, were also listed. In our analysis we have used both these sources, but in our own survey, we only approached the top 60 firms.

Also with regard to the data used, there is a certain fall out. During the three months the survey was being conducted, the sixty firms became, as a result of mergers and acquisition, fifty-eight. Out of these fifty-eight firms, 64 percent took part in our survey (37 firms), and of these, the response rate for the global actors was 55 percent while the response rate for the Swedish firms was 69 percent. An analysis of the data fall-out indicates no systematic deviations and we therefore conclude that the replies received give a representative picture of the characteristics of the population as a whole. To provide some background, we will briefly outline below the development of the Swedish management consulting business during the 20th century, and thereby enlighten some relevant categories of actors. We will then examine what services these categories of firms offer, what client categories they work with, and where in Sweden these relations with the clients are located. Finally, we discuss how to interpret the development that has taken place.

2. Management consulting in Sweden in the 20th century

An early expression of the need of consultation in management and administrative question is to be found in the Industrial Office (*Industribyrån*), where Oskar Sillén, the first Swedish professor in management, ran his own accountancy firm alongside with his engagement at the Stockholm School of Economics (Engwall, Furusten & Wallerstedt, 1999). However, it was not until the 1940s that consulting in management issues began to become established as an industry in itself. This is evident from the establishment in 1948 of a Swedish association for organisational consultants (*Svenska Organisationskonsulters Förening*).

One of the first true management consultancies was Ekonomisk Företagsledning, which was established in 1943 but acquired by the British firm PA Consulting Group in the 1960s. More consultancies were established in the 1950s, one of which is the international productivity and rationalisation consultancy Maynard MEC, established in 1956. It was immediately a great success and soon became the largest consultancy in Sweden (Bohlin, 1993). It remained one of the leading consultancies until the late 1980s. Another important actor was the PA Council (Personal Administrative), established in 1952 by the Swedish Employers Association. Its purpose was to support research in human resource management and administration, and to practise management consulting. It later changed its name to FA Council and adopted a more action research-oriented profile. It remained in operation until the early 1990s. Another important firm at that time was Bohlin & Strömberg, established in 1960 and is still in operation today. In fact, it is to be found among the top twenty consultancies. In 1966 another classic management consultancy in Sweden, SIAR (Scandinavian Institute for Administrative Research), was established (Engwall et al, 1999; Furusten, 1996 and 1999). It initially concentrated on organisation for long-range planning, but later also provided services in divisionalisation. SIAR was quite unique due to its close links with academia and by combining research with consulting. In fact, SIAR employees wrote numerous dissertations and academic publications and a relatively large group of Swedish management professors was more or less raised there. It has also been a source of many spin-offs on the consulting market.

In the beginning of the 1970s, the industry was still relatively undeveloped, even if a competition was picking up. SIAR, and probably also other Swedish consultancies, experienced American consulting firms such as McKinsey & Co and Boston Consulting Group (BCG) as upcoming competitors. McKinsey & Co was the first American consultancy to establish an office in Stockholm in 1980, and it was soon to become one of the largest and most successful consultancies in the field.

However, it was not until the 1990s until the foreign actors began to play a more prominent role in the field. From Table 2 we can note that as late as in 1988, Swedish firms were, both individually and as a group, the largest actors. Ten years later American consultancies had taken over as the dominant and largest actors. In 1988, 67 percent of the top 20 firms' turnover came from Swedish firms, this had dropped to 19 percent in 1997. During the same time period, a small group of American firms (2 companies in 1988 and 13 in 1997) saw their turnover increase dramatically from 14 percent of the market in 1988 to 81 percent in 1997.

Table 2. Management consulting firms in Sweden 1988 and 1997.

	Consulting Firms 1988	<i>Origin</i>	<i>Turnover (MSEK)</i>	<i>Number of Consultants</i>	Consulting Firms 1997	<i>Origin</i>	<i>Turnover (MSEK)</i>	<i>Number of Consultants</i>
1	Indevo	SWE	344	254	McKinsey & Co	US	490	127
2	Invent	SWE	52	54	Andersen Consulting	US	480	370
3	PA Consulting Group	UK	133	139	Boston Consulting Group	US	210	58
4	McKinsey	US	130	50	ALMI	SWE	175	270
5	SIAR	SWE	99	89	CARTA CA	SWE	174	93
6	Habberstad	N	98	94	Arthur D Little	US	170	39
7	Cicero	SWE	81	77	Ernst & Young	US/UK	168	115
8	Maynard	US/NL	47	53	KPMG Consultants	US	145	147
9	Sinova	SWE	33	32	Coopers & Lybrand	US/UK	140	130
10	Bohlin & Strömberg	SWE	31	28	Gemini	F/US	135	50
11	Cepro	SWE	29	25	Price & Waterhouse	US	77	61
12	Sevenco	SWE	28	21	Askus	SWE	70	50
13	Nordic Management	SWE	24	13	A.T Kearney	US	63	20
14	Consultus	SWE	24	18	SLG/Thomas international	SWE/US	63	70
15	Lagerqvist & Partners	SWE	24	10	IBM Consultants	US	56	
16	Semco	SWE	18	18	Bain & Co	US	56	22
17	Ingemar Claesson	SWE	12	14	Bohlin & Strömberg	SWE	56	54
18	SMG	SWE	10	7	Cepro	SWE	56	27
19	Trim	SWE	9	6	Deloitte & Touche	US	35	37

20	SRC	SWE	8	4	Sinova	SWE	28	23
	Totalt		1.200	1.000	Totalt		3.200	1.800

Source: Analyses and processing of data published in *Konsultguiden* (1989; 1998, 1999).

NB: In *Konsultguiden* 1998 has no data on the number of employees for Almi and Carta in 1997. The figures in the table are therefore from the 1999 version of the guide, which reports on conditions in 1998.

The development between 1988 and 1997 shows that many international consulting firms tried to establish themselves on the Swedish market in the late 1980's. Among them was the German consultancy Roland Berger, which also set up an office in Stockholm in 1989. However, it did not reach the position it expected and the office was closed only a few years later in 1992. L.E.K., a large British consultancy that had long been interested in the Swedish market, attempted to enter the market in 1991 by acquiring Nordic Management. However, in 1993, it went bankrupt. The early 1990s were tough years for the Swedish economy and many consultancies that had sewn their suits based upon their experiences of the successful 1980s found themselves in financial difficulty.

This fate was also in store for Indevo, the most successful Swedish consulting firm of the 1980s and, together with McKinsey & Co, the leading actor in Sweden during this period. Its ambition had been to become the European alternative to McKinsey & Co and BCG, but in the early 1990s it had to give up its plans of doing it alone. Indevo's subsequent attempt to secure a deal with Bain & Co fell through when the latter's financial problems prevented it from fulfilling its part of the deal. Another American firm, Alexander Proudfoot, seized the opportunity to enter the attractive Swedish market and acquired Indevo in 1991. However, this was to be a short marriage and its Swedish office was declared bankrupt two years later. Meanwhile, in 1992, A.T. Kearney acquired the Norwegian long-timer Habberstad.

As we have seen, from about 1990, the only actors left in the field were the Americans and the Swedes. After the fall of Indevo, McKinsey & Co became the leader but soon found itself in competition with other American firms. These included Boston Consulting Group, which established an office in Stockholm in 1989 (in 5th place in 1990); Andersen Consulting (in 3rd place; the parent company was established in 1979); A.T. Kearney (14th), and semi-American firms represented by the management consulting fractions of the large accountancy firms such as Coopers & Lybrand/Öhrlings (established in 1986, 9th place), KPMG (7th place, established in 1990), and Ernst & Young (6th place; its parent was established in 1981). Three years later, in 1993, the American consultancy Arthur D. Little opened a Swedish office (7th place) and was followed in 1996 by Bain & Co (19th), Deloitte & Touche (21st) and Burston Martsaller (16th) of American origin. The latter has, however, changed profile and moved list. In the 1998 version of the guide, it is ranked amongst the top ten public relations and communications consultancies. The following year (1997), more semi-American firms such as Price Waterhouse (11th), Gemini Consulting (10th), and the American IBM Consultants (15th), were all to be found on the top twenty list.

Gemini's establishment is worthy of comment. In 1996 it acquired a rather small Swedish firm, Svennerstahl & Partners, which had some ten employees at that time. The following year Gemini acquired one of the largest Swedish firms, SIAR, which in 1991 had merged with the French consultancy Bossard. One of the reasons behind the SIAR-Bossard merger was to build the largest management consultancy in Europe of non-American origin. The new firm kept the former SIAR's position at the Swedish market around fifth place until 1994. However, it subsequently began losing ground and by 1996, it had slipped to tenth place. In that year, Gemini acquired Bossard; this was a family affair, since Bossard and Gemini were already related.

The merger and acquisition trend has continued, one of the latest being the acquisition in 1999 of Carta, one of the largest Swedish firms, by the American giant Booz, Allen & Hamilton (DI, 1999-04-09). Given this tendency towards a concentration of American giants on the market, it is interesting to note that only two Swedish firms, Sinova and Bohlin & Strömberg, have been on the list every year. Also, they both slipped from being among the top ten to around 20th place in 1997. Cepro, one of the largest Swedish companies in 1987, showed a similar decline. However, this was not the case for all Swedish firms. SMG (Service Management Group), an offspring of SIAR ranked 18th on the 1987 list, made its way up the list and by 1996 it had climbed to 12th place. In 1997, however, it fell to 22.

American firms are not the only ones to merge with each other or acquire Swedish firms. In 1998, for instance, two large Swedish companies, Askus (ranked 12) and Kirstein-Walerud (ranked 27), merged. Since Carta is no longer Swedish, this new constellation is believed to be the largest private Swedish consultancy. Another interesting development occurred in the spring of 1999 when Sinova (ranked 20) merged with the Danish consultancy Kjær & Kjærulf. Moreover, since 1998, Sinova has been the owner of Sinova A/S in Norway. It also has plans to move into Finland in the near future (DI, 1999-06-01).

Finally, the consultancy in fourth place on the 1998 list, ALMI, is worthy of comment. ALMI is a state-owned consultancy, which until a few years ago was organised as regional development foundations with regional offices throughout the country. Every county had its own unit whose aim was to support political programmes for innovation and entrepreneurship. Applicants were given support to start new firms and put new business ideas into practice. The local office provided financial support, consultation and training. Today, these activities have been reorganised and commercialised although they are still directed at small, growing firms.

The development described above mainly concerns the top twenty firms and, for this reason, it does not offer a complete picture of the Swedish management consultancy field. However, to gain an understanding of the size of the market and its development in the 1990s, we need the estimates made by *Konsultguiden*, as they are the only available figures. As shown in Table 1, the total turnover for the top twenty firms in 1988 was estimated at about SEK 1 200 billion (about US \$180 million); 67 per cent of the turnover came from Swedish firms, 14 per cent from US firms and 19 per cent from other nationalities (UK and Norway). The number of consultants employed in these firms was reported to be about 1 000.

Of these, 66 per cent were employed in Swedish-owned firms, 10 per cent in US-owned firms and 24 per cent in firms owned by other nationalities. In 1992 it was estimated that, in total, the market comprised some 1 500 to 2 000 consultants. Of these, 1 200 were employed in the fifty largest firms and about 1 100 in the top twenty firms. The total turnover of the market was estimated at about SEK 2 billion (about US \$300 million); the top twenty had an aggregated turnover of about SEK 1 300 billion (about US \$190 million). This is to be compared with the scenario in 1996 when the sixty largest consultancies employed about 1 900 consultants and had a total revenue of SEK 3.2 billion (about US \$450 million). The top twenty consultancies at that time employed around 1 500 consultants and had a total turnover of approximately SEK 2 400 billion (about US \$250 million). If we extrapolate according to the 1991 figures regarding the total number of consultants, the number of management consultants in Sweden totalled about 2 500. In 1997, finally, the total revenue for the top sixty consultancies amounted to approximately SEK 4 billion (about US \$560 million) and they employed some 2 000 consultants. As shown in Table 1, the aggregated revenue for the top twenty firms amounted to SEK 2 800 billion (about 420 million US dollars); 19 per cent of this came from Swedish firms and 81 per cent from US firms. Altogether they employed around 1 700 consultants; 30 per cent were employed in Swedish-owned firms and 70 per cent in American or semi-American firms.

To sum up, in terms of owner concentration, the market was clearly americanised during the last decade of the 20th century. It is quite probably that the market today is larger and that most of the activities are concentrated to a much greater extent around a few major actors of American or semi-American origin than was the case some ten years ago.

The development of the Swedish market described above shows that most activities on the market today are likely to be performed by a few global actors of American or semi-American origin. This means that, in one way or other, the market over the last decade has seen a concentration of firms of American origin. Similar observations have been made in other national markets as well (Kipping et al. 1999; Kipping & Armbrüster, 1999). A clear pattern seems to be that the management consulting fractions of the large American or semi-American accountancies follow each other since they entered the Swedish market at about the same time, namely around, 1990 (Anersen, Coopers & Lybrand, KPMG, Ernst & Young). Deloitte & Touche and Price & Waterhouse are exceptions since they did not appear on *Konsultguiden's* list until, 1997.

In the analyses above, three clear categories of consultancies emerge (1) American (e.g. McKinsey, BCG, Arthur D. Little, Andersen Consulting, Bain & Co and Booz Allen & Hamilton), (2) semi-American (British-American firms such as Ernst & Young, PriceWaterhouseCoopers, KPMG Deloitte & Toche and the French-American firm Gemini, and (3) Swedish firms (large and middle-sized firms such as Askus, SMG, Sinova, Bohlin & Strömberg, Consultus, Cepro and a number of smaller firms like InterPares, Lagerqvist & Partner, Ingmar Claesson konsult, and Bruzelius & Skärvad International). In the next section, we explore whether the development in the 1990s towards a concentration of sellers who operate globally and are of American and semi-American origin has caused isomorphism in the services that different consultancies provide.

Different Categories of Management Consultancies and their Services

The categories of consulting firms that were specified above are used here to search for similarities as well as dissimilarities in the services consulting firms offer. We categorise Andersen Consulting as semi-American firm in that it is an offspring from an auditing firm (Arthur Andersen) and has many similarities with the management consulting departments of the large British-American auditing firms. We also specify the size according to turnover of Swedish consulting firms to see if there are any differences between the services that are offered by large (over SEK 50 million in turnover), medium-sized (SEK 10-50 million in turnover) and small (below SEK 10 million in turnover) firms.

A comparison of the six categories shows that the US firms appear to focus mainly on Strategy & Business Development services. Overall, the emphasis on Strategy and Business/Organisation Development is very clear regardless of the type of firm, the one exception being the semi-American firms where we see a much more even distribution of services. The category of large Swedish firms greatly resembles the classic category with one exception, namely Human Resources consulting. The other categories (Swedish medium-sized, small, and smallest firms) all appear to perform the same types of services, one exception being Human Resource Management that does not appear to be a priority area. The small firms stand out as a result of their specialisation in Procurement & Logistics (15% compared with 0 and 1% for the other categories).

Table 3. Different categories of consultancies their services.

The Firms Share of their Revenues Divided Into Different Types of Services (%)

Consulting Firms	Strategy	Organisational development	Financial services	HRM	Management accounting	IT/ telecom	Logistics	Auxiliary	Total
Semi-American	11	13	13	5	22	17	9	10	100
American	63	2	0	0	0	3	17	15	100
Large Swedish	30	25	8	30	0	0	0	7	100
Middle-sized Swedish	24	15	7	19	3	10	1	21	100
Smaller Swedish	33	15	3	8	5	4	15	17	100
Small Swedish	28	20	7	10	6	8	1	20	100

Source: Analyses and processing of data published in *Konsultguiden (1998)*

The results above indicate that the global American and semi-American firms have different profiles with regard to the services they offer. Another interesting observation is that Swedish firms show remarkable similarities even if there are differences with regard to specific services. A look at 4 reveals that no single category consulting firms dominates the market. However, it is clear that American and semi-American firms play an important role. They are the biggest actors with over 50 percent of the market within all types of services except for

organisational development (OD) and HRM, where Swedish firms have 60 percent and 80 percent respectively. In several cases, one single category of firm dominate. American firms represent 55 percent of the market with regard to strategy services and 53 percent with regard to logistics and procurement. Semi-Americans have a market share of approximately 60 percent for financial services, 86 percent of the market for financial control and 65 percent of the IT services market. Consequently, a clear concentration of global actors of an American origin is found within services dealing with strategy, finance, financial control, IT, and procurement/logistics. With the exception of consultation for foreign clients and procurement/logistics, however, major differences exist between American and semi-American firms. Medium-sized, small, and very small Swedish firms appear very similar again with the exception of procurement/logistics, where the small Swedish firms emerge as the only option with 16 percent of the market. Those who differ are the other categories, American, semi-American and large Swedish firms. In only one single case, OD, are there two equal actors in terms of market share, namely semi-Americans (31%) and large Swedish firms (33%).

Table 4. Concentration in different categories of services

Consulting Firms	The Firms' Share of the Market in Different Categories of Services (%)							
	Strategy	Organisational development	Financial services	HRM	Management accounting	IT/Tel e-com	Logistics	Auxiliary
Semi-American	10	31	59	15	86	65	30	23
American	55	5	0	0	0	11	53	32
Large Swedish	15	33	21	51	0	0	0	9
Middle-sized Swedish	8	14	12	22	5	15	1	18
Smaller Swedish	9	11	4	8	6	5	16	12
Small Swedish	3	6	4	4	3	4	0	6

Source: Analyses and processing of data published in *Konsultguiden* (1998)

We can conclude that different categories of consultants have different profiles with regard to the services they offer. This can be interpreted to mean that the market is differentiated, in so far as different categories of actors offer different services. In this sense, the market can be characterised as lacking a role model for all types of consulting services. Within different service areas, dominant actors (with more than 50% market share) emerge. It is therefore possible that the content of these services as a whole is more homogenous. Semi-American firms dominating three of the seven service categories analysed. In addition, American and Swedish firms have the dominant position within two areas each. We can therefore conclude that the global actors' entrance on the Swedish market has

lead to a situation where it is possible that, in their dominant positions, they may act as standard- and norm-setters as well as role models in five out of the seven services analysed. This does not mean, however, that together they have a converging influence on the services offered on the market as a whole since individually they have different service profiles.

Types of clients

In the statistics on the consulting industry published in *Konsultguiden* only very little information is available on the firms' clients. A possible explanation for this is the confidential relationships with the client that is an important part of the trust as consultants build with their clients (cf. Greiner & Metzger, 1983; Kubr, 1996). It may be unwise from a competition perspective to give details about clients since potential competitors might disturb the relationship. These aspects might to some extent explain why the information in *Konsultguiden* is of a rather superficial character and only includes the relative distribution between private, public and foreign clients (Table 5).

Table 5. Clients of American and Swedish consulting firms 1997.

Consulting Firms	The Firms' Share of Revenues from Different Types of Clients (%)			The Firms' Revenues (MSEK)	Share of Total Revenues (%)
	Private	Public	International		
Semi-American	93	1	6	1.253	30
American	75	15	10	1.189	28
Large Swedish	66	21	13	702	17
Middle-sized Swedish	68	19	13	480	11
Smaller Swedish	67	19	14	399	9
Small Swedish	70	22	8	164	4
Total	70	16	14	4.189	100

Source: Analyses and processing of data published in *Konsultguiden* (1998)

From the table above (Table 5) we can note that the Big Five firms have the largest market share with some 30 per cent of the market (measured as relative turnover) followed by the classic US firms with 28 per cent. The Swedish firms, if added together, make up the largest group with 42 percent of the market within the population. A closer analysis of the client profile of the different categories show that the American and semi-American firms differ somewhat in terms of share of turnover from the public sector. American firms are in this sense closer to their Swedish competitors whereas semi-Americans only have a marginal part of their turnover from these clients. They also differ in terms of revenues from abroad and even have a smaller share than the Swedish firms. The distribution between client categories for the Swedish firms indicates major differences. Approximately 66 percent of the revenues comes from private clients, 21 percent from public and 8-14 percent from foreign clients. American firms as a category show similarities with the Swedish firms even though the latter have a somewhat larger share (5%) of their turnover from public clients. The share of turnover from foreign clients is rather similar between categories even though the smaller firms' share is somewhat smaller. In terms of market share within each client category, the distribution between the three categories of consultants is quite even and Swedish firms' share of revenues from private firms is 36%. For the two other client categories, the distribution is more uneven. Large Swedish firms and American firms have similar market shares (about 30 percent public clients and 20 percent foreign clients). Swedish firms dominate with 64 percent of their turnover from public and 43 percent to foreign clients.

To obtain a more detailed picture, we conducted a mini-survey among the top sixty management consultancies listed in the 1998 edition of *Konsultguiden*¹ (see Table 6). We can conclude that the biggest category of consulting services buyers is Manufacturing (17%) and clients from Banking/insurance and IT/telecom (both 16 %). It can be noted that the latter client category is most important to semi-Americans (21%) but is equally important to the other categories (14% on

average). Other patterns worth noting are that the American firms and the small Swedish firms receive approximately the same share (around 20%) of their revenue from Manufacturing while the share for large and medium-sized Swedish management consultancies is only half of that (9%). One extreme is Banking/insurance from which small Swedish firms only derive 4% of their revenues. The one category that deviates is semi-Americans, which appears to focus on three client-categories: Manufacturing (23%), Banking/insurance (20%) and IT/telecom (21%). They also receive a marginal part of their revenues from clients in the public sector (1%). The American firms appear to focus on the same client groups as the semi-Americans (20%; 15% and 13% respectively), but they have a larger client base that cover more categories including public agencies (12%). Despite small variations, it would appear to mean that all categories of consulting firms focus largely on the same types of clients. In this sense, all but semi-Americans have similar profiles. This observation is further supported by the data presented in Table 7, which shows that all categories of consulting firms mainly have clients with over 500 employees. Here, the American firms are extreme in that they claim that all (100%) of their clients are of this size, whereas other categories vary from 79 percent (large Swedish) to 68 percent (small Swedish). Clients with less than 50 employees appear only to a very limited extent as clients to any of the consultants (6% on average).

Table 6. Consulting firms and clients in different industries.

Consulting Firms	The Firms' Share of their Revenues to Different Industries (%)										
	Manu- factur- ing	Proc- ess	Phar- ma- ceuti- cal	Bank & Insur- ance	IT & Tele com	Food & Retail	State owned compa- nies	Public agen- cies	Municip- alities & County councils	Interna- tional Clients	Aux- iliary
Semi- American	23	5	9	20	21	0	1	0	0	6	15
American	20	9	6	15	13	3	3	12	0	10	9
Large Swedish	9	8	7	19	12	9	3	12	6	13	2
Middle-size Swedish	9	3	5	13	16	5	6	7	6	13	17
Smaller Swedish	17	5	6	4	15	9	4	4	11	14	11
Total	17	7	7	16	16	4	3	7	3	10	10

Source: Own survey

Table 7. Consulting firms and the size of their clients.

Consulting Firms	Firms' share of revenues from different size clients (%)		
	Large	Middle-sized	Small
Semi-American	76	18	6
American	100	0	0
Large Swedish	79	18	4
Middle-sized Swedish	73	23	4
Smaller Swedish	68	24	8

Source: Own survey

If the patterns that appear in the table are accurate for the industry as a whole, it means that the different categories are remarkably similar in this respect. Similar observations have also been made by Engwall & Eriksson (1999) in their study of large publicly listed Swedish companies and how they purchase consulting services. If we also include client size (in terms of turnover - Table 8) we find that Swedish firms have a dominant position in 3 out of 10 specified client categories: Food/retail (76%), State-owned companies (57%) and Municipals (100%). It is interesting to note that in the latter client group, the smaller consulting firms have the largest share 39 percent compared to 36 percent for large Swedish firms and 25 percent for medium-sized Swedish firms. With the above exceptions, there is a rather similar distribution within the different client categories, where the Swedish firms as a whole represent 25-35 percent of the market. Another exception is Public agencies where the Swedish firms in all represent 46 percent of the market and foreign clients where the same categories have a 47 percent market share. In one single case, one category represents more than 50 percent of the market, namely Public agencies where American firms reach some 53 percent share. In another case, Manufacturing, both American categories have a larger market share than the Swedish firms (35% for Americans, 39% for semi-Americans and 26% for Swedish firms. In the rest of the client groups semi-American have the largest market share except form process-industry where American firms represent 45 percent of the market compared with the semi-Americans' 24 percent, which is about the same as large Swedish firms (21 %).

Table 8 Consulting firms share of total revenues in different categories of clients.

Firms' share of the market in different categories of clients (%)											
Consulting Firms	Manu- factur- ing	Pro- cess	Pharma- ceutic	Bank & Insur- ance	IT & Tele com	Food & retail	State- owned compa- nies	Public agen- cies	Municip- alities & County councils	Inter- na- tional clients	Aux- ili- ary
Semi- American	39	24	39	37	39	0	10	0	0	18	40
American	35	45	25	30	26	24	33	53	0	31	27
Large Swedish	9	21	19	21	13	39	18	30	36	22	3
Middle- Sized Swedish	7	3	9	10	13	14	25	12	25	15	19
Smaller Swedish	10	7	8	2	9	23	14	5	39	14	11
Total	100	100	100	100	100	100	100	100	100	100	100

Source: Own survey

We can conclude that there the different categories of consultants are very similar in terms of their client structure. However, the most distinct profile belongs to the semi-Americans, who only marginally work with public organisations. Further, it appears that global firms dominate the market with regard to most client categories. No single category of consultants totally dominates any of the client groups except for one case (public agencies). Despite the consultants' many similarities in terms of client structure, both with regard to

diffusion between industries and client size, in some cases one single category of actors emerges as dominant. In the process industry, American firms enjoy a market share of approximately 45 percent while the second largest category, Swedish firms together represent 31 percent of the market. As regards Food/retail, the Swedish firms' market share is 77 percent. Also in the category of State-owned companies Swedish firms dominate with a 57 percent market share. Within these areas, particularly in Foods/retail, one category of actors stands out with such a large market share that it is possible that they "set the standard" for how consulting should be carried out. With regard to the impact of global actors in this sense, they dominate in seven of the ten specified client categories. As noted in an earlier section, the different groups of global actors do, however, appear to differ rather significantly from one another. This means that they do not make a homogenous category, and therefore we cannot conclude that their market share as a group will lead to convergence within the field.

Location of clients

All but one consulting firm in this study are located in one of the three metropolitan regions in Sweden (49 in Stockholm, 6 in Gothenburg, and 3 in Malmoe). As expected, Stockholm appears to be the centre of Swedish management consulting. In the same way the client side shows a similar pattern with a heavy emphasis on Stockholm where 67 percent of the revenues is derived (Table 9). The rest of the country represents, with 17 percent the second largest region, followed by Gothenburg with 10 percent and Malmoe with 6 percent of the market.

In terms of the relation between category of firm and clients location, the classic US firms (73%) and the medium-sized Swedish firms (72%) earn the largest share of their revenue in the Stockholm region. This is also the case for both the Big Five and the large Swedish firms (66%). The smaller Swedish firms (53% in Stockholm) differ in that about one third of their business is outside the major cities (compared with 18% for American firms). This region consequently appears relatively more important for smaller Swedish firms.

Table 9. Location of the clients divided into different categories of clients.

The Firms' Share of their Revenues to Clients in Different				
Regions (%)				
Consulting Firms	Stockholm (%)	Gothenburg (%)	Malmoe (%)	Additional areas (%)
Semi-American	66	12	7	15
American	73	8	3	18
Large Swedish	66	12	11	11
Middle-sized Swedish	72	8	7	13
Smaller Swedish	53	9	4	33
Share of Revenues	67	10	6	17

Source: Own survey

In terms of market share for different types of consulting firms within different regions (Table 10), the American and semi-American firms together represent 64 percent of the Stockholm region market, 60 percent of the Gothenburg market, 48 percent of the Malmoe market and some 55 percent of the rest of the country. In Stockholm, the industry appears divided in three with some 33 percent of the market each from the semi-American, American and Swedish firms.

Table 10 Consulting Firms Share of the Market in Different Regions

Consulting Firms	The Firms' Share of the Market in Different Regions (%)			
	Stockholm (%)	Gothenburg (%)	Malmoe (%)	Additional areas (%)
Semi-American	30	38	36	18
American	32	23	13	31
Large Swedish	17	21	32	12
Middle-sized Swedish	13	10	14	9
Smaller Swedish	8	9	7	20
Total	100	100	100	100

Source: Own survey

A similar distribution is also to be found in the rest of the country with the difference being that this market represents a relatively larger share of smaller firms' total turnover (20% of their total revenues). In all areas, Swedish firms together appear to be the single largest group. Only in the Malmoe area (53%) and the rest of the county (41%) does one single category appear dominant relative to others, namely Swedish firms. This dominance is not overwhelming and the Swedish firms are not a homogenous category even if similarities are evident. Consequently, it would be difficult to conclude that one single category could be a trend-setter in any specific region.

To conclude, market shares are evenly distributed over the different categories in all areas. This means that no single category has achieved market dominance in any single region. In other words, the market cannot be characterised as geographically dispersed in that the global firms focus on clients in the metropolitan regions and smaller Swedish firms on the rest of the country. Each region instead shows remarkable similarity. The global actors dominate as a group in all regions apart from Malmoe, but this does not mean that one type of consulting dominates the field since the global firms are dissimilar (see above).

Conclusions

We have seen that the Swedish market for management consulting can be divided into three main categories of actors with separate profiles mainly with regard to types of services offered: American firms have 28 percent, semi-American firms have 31 percent and Swedish firms together represents 42 percent of the total market within the population. The last decade has seen a shift towards American firms but we have been able to conclude that these actors show dissimilarities with regard to the types of services they offer. Between 1988 and 1997 the market has grown quite substantially and for the twenty largest firms their turnover has nearly tripled. This may suggest that the global actors have not grown at the expense of the Swedish firms but rather that they have benefited from the general growth of the market. The medium-sized Swedish firm Sinova, for instance, had the same turnover and the same number of consultants in 1988 as in 1997. Another example is Bohlin & Strömberg, one of

the large Swedish firms, which nearly doubled its turnover and more than quadrupled the number of consultants during the same period. A similar development took place in another medium-sized Swedish firm, Cepro, the difference being that it quadrupled its turnover while the number of consultants remained the same. Consequently, some Swedish firms have also benefited from the general market growth.

The global firms consequently dominate the Swedish market at an aggregated level, but this does not necessarily mean that the consulting that is carried out is converging. Our analysis indicates that tendencies towards convergence may be at hand and that global firms are important in this regard, but since their respective profile are so different they cannot be considered a homogenous category. While no single actor dominates the field as a whole, in some services, client categories and regions might very well be dominated by certain categories of actors. To further analyse this, Table 11 shows specific situations in which dominant actors are most likely to appear.

It is worth noticing that we have not found any significant differences between the different categories of firms with regard to where their clients are located. The situation is, however, somewhat different for types of clients and types of services. As shown in the table, convergence on the market may happen as a result of dominance on the market in services like management accounting, IT, and Financial services delivered by semi-American firms to the Manufacturing and Pharmaceutical industry, and to clients within Banking and Insurance and IT/telecom. For the same reason, convergence may also occur within strategy and logistics services delivered by American firms to clients within process industry and public agencies. Another possibility is that this might also take place within Human Resource Management and OD services provided to Food/retail, State-owned companies and Municipalities from Swedish firms. The latter case, however, may hardly be seen as a consequence of an increased presence of the market from global actors of American origin.

Table 11. Different Categories of Consulting Firms and their Profiles.

	Type of Service	Type of Client	Localisation of Clients
Semi American	Management accounting, Finance, IT	Manufacturing, Pharmaceutic, Bank/insurance., IT/telecom	Stockholm, Big Cities, Country Side
American	Strategy, Logistics	Process, Public agencies	Stockholm, Country Side, Big Cities
Swedish	HRM, Organisational Development	Food/ Retail, State owned companies, Municipalities/Coun ty Councils	Stockholm, Big Cities, Country Side

This study has argued that market dominance is a pressure that may cause convergence on the consultancy field. However, this was not found to be the case. Instead, it might cause other actors on the field to distance themselves from the dominant actors in order of offer clear alternatives of complements. In this

case, market dominance would lead to divergence rather than convergence. The fact that global actors whose profiles diverge from that of the Swedish firms have established on the Swedish market can also *per se* be seen as a sign of variety, especially considering that they themselves do not make up a homogenous category. It is even possible that the services were more homogenous before the mid-1980s, before the global firms entered the Swedish market. This is though an empirical question that is not dealt with here.

The consulting firms, dominant or not, constitute only one dimension of the field. The activities that take place there are also affected by institutional variables such as ideology, fashion, professionalism within the field, management discourses, research and education, and media (cf. Meyer, 1994; Engwall, 1999). In this regard, it is perhaps easier to find similarities both on a national and on a global level. If these aspects has been globally diffused it means that who the actors are matters less to the field since they only express ideas that are already established. In this case, convergence would only to a lesser extent be driven by concentration to a few actor categories and convergence or divergence would be established regardless of who the actors are (Meyer, 1994). To give a more complete picture of the forces at hand, institutional forces would need to be analysed.

This study deals with the macro level and only official information supplied by the firms themselves has been used. It is therefore quite possible that our data was influenced by what the firms want to convey rather than what they do. To be able to draw conclusions regarding convergence or divergence in the actual consulting carried out by different categories of firms, and to see if convergence takes place to a larger or lesser extent in different dimensions, we would need to leave the macro-level and study exchanges between different categories of buyers and sellers of consulting services. As pointed out initially, obvious similarities or differences at this level do not mean that the same pattern is to be found in the consultation that is delivered and consumed. Even though our results are based on public sources and there may be a difference between presentation and action, the fact remains that global actors offer similar services regardless of where in the world they are active and diffuse forms of consultation that earlier didn't exist in local markets. Due to their size, they are likely to contribute to a global convergence of management consulting. The results of this study have though shown that one global form of consultation has not been established, in the sense that local actors in the market to a large degree resemble the large global actors.

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