Jurgen EMERY
Rennes - France
☎ +33 (0) 670 753301
✉ j.emery@in3co.com
Consultant

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Market Study

Consultancy in context

This report refers to the study conducted by Jurgen Emery between October 2004 and September 2005, as part of his training with IDCE® in Angers, France.

The author would like to thank all participating organisation representatives who shared some of their time to contribute to this study.

The author also extends special thanks to the tutoring team of the IDCE® whose training helped him develop the methodologies presented in this report.

Contents

1. Introduction

The initial period planned for this study was three months. However, newer, more recent data have been included to highlight the evolution of the consulting market over the longer period of four quarters. In the field of Information and Communication Technology (ICT) the market in France and in Europe is finally showing signs of recovery after the dramatic bursting of the Internet "bubble". This study therefore runs from October 2004 until September 2005.

One of the initial options for the author's consultancy practice was to look for missions *via* an intermediate organisation. Towards the end of the study it was becoming apparent that this business model is not only an option but, is indeed essential, for reasons which will be described in this report.

It is appropriate to note that this market study represents "work in progress" and is merely the starting block of the permanent action of prospecting for future consultancy missions.

2. Study Objectives

The primary aim of this market study is an analysis of the extent to which consultancy is used in the ICT sector in which the author expects to sell his services as a consultant. The secondary aim of the study is the development of a set of tools and methods for analysis of the market environment. This report presents both of these aspects of the study in parallel. The source data for the study is provided by interviews with prospective clients.

3. Scope of Study

A panel of prospective clients was selected according to the following criteria:

- Geographical location,
- Geographical business reach,
- Technical activity and,
- Company size.

A handful was also selected to diverge deliberately from these criteria (eg. banking, logistics, food processing, …) so as to validate the overall choice of criteria.

3.1. Choice of Interview Panel

To facilitate the analysis of the results, the panel of prospective clients has been grouped by activity into the following domains:

- Communications Network Operator,
- Food Processing,
- ICT Manufacturer,
- ICT Services and Consultancy Firm,
- Inter-Enterprise Business Coordination (both state-run and private bodies) and,
- Legal and Administrative Services (banks, insurance and law firms).

Additional activities, including Retail, Newspaper, Education and Government Institutions, have been grouped together into the "other" domain.

Contributions have been provided by a total of 54 organisations, distributed by domain as shown in figure 3.1.

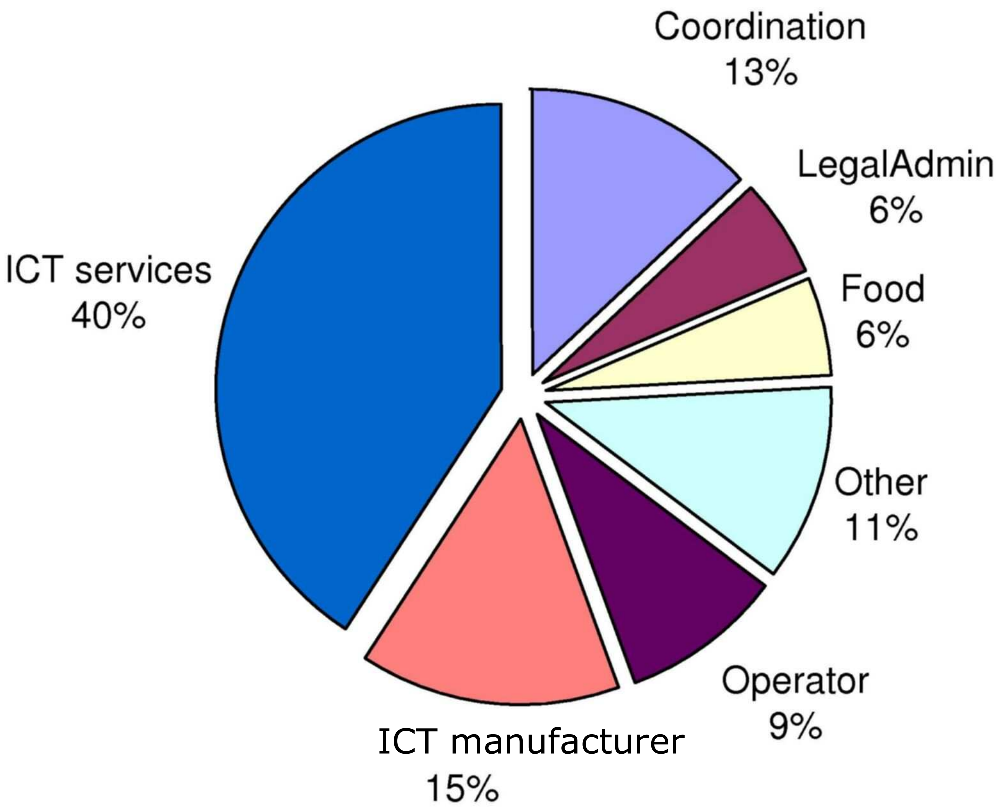

Figure 3.1: Interview panel share by domain.

3.2. Client Type Distribution

For each organisation and with respect to their use of consultancy, one of the following "Types" was assigned prior to interviewing and, if necessary, updated upon analysis of interview results:

- Early Adopter
- Mainstream
- Conservative
- Reference

Client Type was well distributed with respect to domain of activity, as is shown in figure 3.2. This diagram also shows the relatively high number of Conservative types.

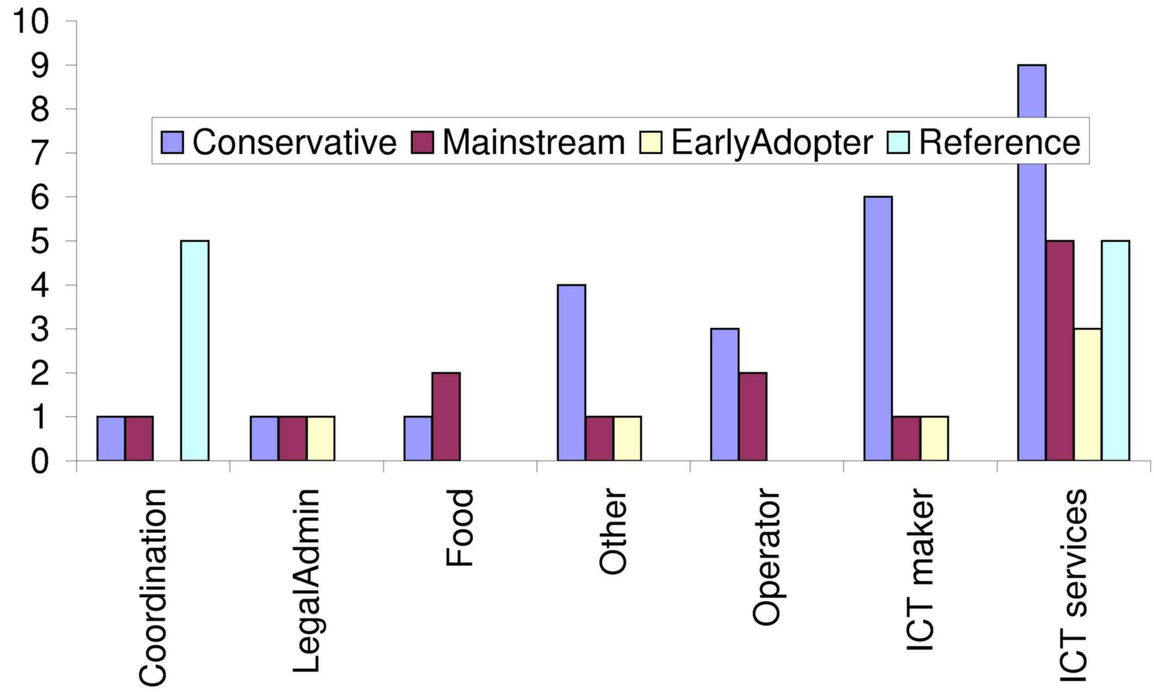

Figure 3.2: Number of clients by Type and by activity.

4. Interview Strategy

One or two representatives from the prospective client organisation were invited to participate in an interview lasting not more than one-hour. Most interviews were physical meetings. Four were performed by telephone.

The set of questions used in the majority of interviews is shown in figure 4.1. To improve the efficiency of the interview, the questionnaire was communicated to the interviewee prior to the interview.

A set of questions was developed comprising specific questions as well as open-ended questions, allowing a variety of interview style. The priority questions were designed to help discovering:

- the functional structure of the client with respect to their generation of added value,
- the communication strategy between teams and externally,

- the issues associated with multicultural projects and,
- the degree of utilisation of external resources.

1. What is your analysis of the current development of your organisation?

1a. What are your fields of innovation?

1b. Are you involved in one or more international projects?

1c. What are your main groups (by activity) that need to communicate with each other to generate your value chain?

1d. What is your inter-team communication strategy (procedural, technological, other)?

2. What are the main issues which you are currently encountering, which remain unresolved? Their priorities?

3. What are your expectations of consultancy with respect to helping resolve the problems identified above? Their priorities?

4. Have you used consultancy services in the past year? How many times? What types of mission?

5. If you were to use consultancy services to resolve one of the priority issues identified, which one would it be and in what time-frame?

Figure 4.1: Questionnaire used in majority of interviews.

An interesting phenomenon was observed during many of the interviews which, no doubt, is related to the psychology of meetings. There is a moment in the interview when the interviewee "suddenly becomes more interested" in the meeting process. There is a *before* and an *after* this moment. Occasionally, the moment is never reached during the one hour interview and on other occasions it is reached within just a few minutes. Typically it takes between twenty and forty minutes to reach this moment in a one hour interview. This "contact" event seems to correspond to the realisation, on the part of the interviewee, of the wider context being addressed by the consultant.

The results of the interviews are presented in the following sections.

5. Analysis and Results

It is worth noting that the consultant was well-received by every client who agreed to be interviewed for this study. This section describes how the riches of the interview were extracted and used to obtain valuable insights into the workings of the market the author is interested in.

5.1. Methods for uncovering the data

The raw data produced by the interview, consisting typically of two or three pages of manuscript notes, were condensed into a synthesis report of half a page. This synthesis report formed the basis of a client by client analysis based upon the criteria shown in figure 5.1. For each client, the analysis was summarized as a line in a spreadsheet database which facilitated sorting in various ways for analysis[1].

General categories
Name
Type (Mainstream, etc.)
Activity domain
General comments
3 strong points
3 week points
Priority issues (4 maximum)

With respect to Consultancy
Expectations (4 maximum)
Number of missions over past year
Description of actual missions (up to 4)
Description of potential missions (up to 4)

Figure 5.1: Criteria for analysis of each interview synthesis.

An initial and qualitative overview of this analysis is presented in the following sections 5.2 and 5.3.

[1] The same file was used to manage the meeting arrangements, associated telephone calls, comments, etc. This file has since become the primary prospection database used by the consultant.

To ensure the pertinence of this market study for the professional field in which the author practices, an additional layer of analysis was achieved by defining criteria inspired by the initial qualitative overview. Pseudo-quantitative values were assigned to these new, specific criteria with some rather surprising results. This interesting exercise is presented in section 5.4.

5.2. Analysis by Client Type

This section presents an analysis focused on the profession of consultancy, beginning with figure 5.2, which compares the frequency of use of consultancy with the Client Type.

	Client Type		
Use of consultancy	**Early Adopters**	**Mainstream**	**Conservative**
Number of consultancy missions purchased in year	~ 10 times a year, and often as continuous support.	~ 5 times a year, little budget and few opportunities identified	Between 0 and 5 times a year.
Dominant topics	Support in a general sense and for team performance, project management, also expertise.	Expertise, support. Interventions, audits or specific animation.	Restructuring support.
Evaluation of results	Adaptability is required. There is a certain amount of discontent with current support. The client seems to understand well how to use consultancy resources, making for fruitful missions and the identification of future opportunities.	Less sensitive than the Early Adopters to the opportunities which consultancy brings.	At first sight, consultancy is “an unnecessary expense”. However, at times consultancy represents the only possible option.

Figure 5.2: Client relationship with respect to consultancy.

The success of a consultancy mission in a professional sense, putting aside the expert contents of the mission, seems to depend significantly upon the attitude of the client towards consultancy. The topics for which consultants are hired (see figure 5.3) show a general orientation of activity towards *support* for the Early

Adopters, an activity which represents, of course, the foundations of good consultancy.

It is appropriate to remind the reader that the contents of these tables represent client expectations as expressed during interviews for this study and that this client perception does not necessarily correspond to any particular consultancy methods in practice.

	Client Type		
Topics	**Early Adopters**	**Mainstream**	**Conservative**
Topic 1	Facilitator with independence, especially for help in resolving organisational issues.	An "external point of view": a neutral observation, an impartial analysis.	Consultancy to the enterprise directorate in the case of restructuring.
Topic 2	Specialised consultancy for support on a particular project.	Audit and consultancy in the management of Human Resources (evaluations, coaching).	Accountancy : (big) financial firms (eg. KPMG)
Topic 3	Human Resources support and coaching.	ICT deployment.	Expert in a particular field (less consultancy, more ICT outsourcing).
Topic 4	-	Support in a particular field (eg. on the production line).	Frequently one tries to find the response to a consultancy requirement internally. [The problem with this option is the lack of neutrality of the contributor].

Figure 5.3: Priority topics for possible missions suggested by clients.

It seems that the “Conservative” client type does not expect the consultant to support their activities but, rather, to serve as an information reference source for their activities.

This range of attitudes towards consultancy is also reflected in the analysis of mission evaluation criteria (figure 5.4), where we once again note the use by Early Adopters of consultancy for the management of human interactions, whereas Conservatives are more interested in technical expertise. These different approaches give rise to types of engagement contract which correspond to the characteristics of the desired consultancy: either an emphasis on provision of means or an emphasis on the delivery of specific results.

	Client Type		
Criteria	**Early Adopters**	**Mainstream**	**Conservative**
1	Adaptive capability	Neutral observation. The audit is sufficient for providing the criteria for measuring a change.	Preference is for big firms or consultants with significant experience in a very precise field.
2	Ability to federate communication	Change management support	Professional experts (eg. for law, KPMG).
3	Capacity to facilitate change (in the organisation of human resources, in the environment, etc.).	Mediation to facilitate the interactions between partner organisations.	Ability to identify a potential need for change.
4	Expertise in a specific field (eg. ICT)	Expertise in a specific field (eg. ICT outsourcing).	Ability to advise on appropriate tools, for instance for change management.
5	Cost	Diagnostics which facilitate the adaptation of a tool.	Distribution of management strategy or communication from corporate direction to corporate employees (eg. training).
Work methods	Methodology, for example to facilitate the cohesion of a team during a difficult period. The client initiates the work of coproduction with the consultant.	One observes an attitude which begins to lean towards outsourcing and the delivery of material results [but legal configuration often has emphasis on provision of means only].	Consultancy is perceived as an expert training tool.
Results desired	Facilitate an operation of internal change in the client organisation.	Mediation between teams or organisations.	Quantitative results (eg. number of employees trained, number of cases analysed, etc.).

more emphasis on means ←——————→ more emphasis on results

Figure 5.4: Consultancy mission evaluation criteria proposed by clients.

Having detailed the client relationship with respect to consultancy in the general sense, the following section turns the analysis towards fields of activity.

5.3. *Analysis by Client Activity*

The qualitative results of this study can be grouped according to the following four domains of activity:

- Inter-team communication
- International project management
- Deployment of technological tools
- Change management support

The synthesis of the comments made during the interviews is presented in the four figures 5.5 to 5.8, with particularly sensitive points coloured in yellow.

		Coordination	ICT (serv., oper., manufacturers)	LegalAdmin	FoodProcessing	Other
Issues	More transverse integration between teams		•	•	•	•
	Internal strategic coordination towards external partners					•
	Facilitate interface between multiple leaders: big groups and internationally		•		•	
	Sharing of communication tools and methods			•		
Consult Action	Analysis of contact opportunities					
	Observation and support to facilitate inter-team communication					
	Communication tool recommendations					
	Training in their use					

Figure 5.5: Inter-team communication.

		Coordination	ICT (serv., oper., manufacturers)	LegalAdmin	FoodProcessing	Other
Issues	Set-up and coordination of European partnerships	•	•	•	•	
	Projects for the European Commission or internal projects (in the case of Multi-National Groups)		•	•		
	Facilitating transverse communication	•	•	•	•	•
Consult Action	Mediation with financing sources					
	Project tracking tool recommendations					
	Sharing strategy across multiple cultures					

Figure 5.6: International project management.

Issues	Coordination	ICT (serv., oper., manufacturers)	LegalAdmin	FoodProcessing	Other
Improved ICT installation			●	●	●
Improved communication on ICT projects	●		●		●
Better user support	●		●		●

Consult Action
Project coordination support
Help chosing tools
Monitoring technology and methodolgy developments

Figure 5.7: Deployment of technological tools.

Issues	Coordination	ICT (serv., oper., manufacturers)	LegalAdmin	FoodProcessing	Other
Internal restructuring	●	●	●	●	●
Adaptation of tools and methodologies			●	●	●
Training needed to accompany change		●			●
Faciliting the interface between generations during team renewal				●	●

Consult Action
Ergonomic study of tools and methods in their utilisation context
Recommendations on pertinent adaptations
Training

Figure 5.8: Change management support.

The above tables show clearly the opportunity for cross-cultural project management consultancy. Also, many organisations are undergoing or began to undergo during the past year, significant internal restructuring. Figure 5.8 records this as an "issue" and, therefore, as an event which is not experienced in a positive way.

The main issues brought to the surface in this section are focused upon further in the following section.

5.4. Pseudo-Quantitative Analysis

This section presents a methodology which allows a more quantitative analysis of the study, facilitating various comparisons between different client characteristics by applying a similar

j.emery@in3co.com www.in3co.com

numeric scale to each characteristic. The method has been developed specifically by the author for this market study and is presented here because of the key role it has played in helping the author to identify his consultancy market.

5.4.1. Extracting the data

A set of forteen pertinent criteria were chosen, inspired by the qualitative study results, grouped into three broad client characteristics, as shown in figure 5.9. The methodology of the scale of values is presented in the appendices in figure A.2.

Characteristics	Criteria	Description
External client characteristics	Growth (-2/+2)	Organisation is shrinking, stable or growing.
	Size (1/5)	Size of organisation, giving a notion of headcount and revenue.
	Abroad (0/4)	The significance of international activities of the organisation.
	Intercultural(0/4)	A measure of the presence of multiple cultures in the organisation.
	Multisite (0/4)	Indicates whether the organisation operates in a number of locations (in France or elsewhere)
	Restructuring (-4/0)	Indicates the significance of possible restructuring of the organisation.
	Innovation (0/4)	Shows the degree of activity of the organisation in the field of innovation.
Concerning use of consultancy	Freq used (0/4)	Gives an idea of the frequency of consultancy missions in the organisation.
	Freq want (0/4)	Gives an idea of the consultancy missions wanted by the organisation (this value can be significantly higher than the "Freq used" metric in the case of budgetary restraints).
	Procurement barrage (-4/0)	Indicates the accessibility of the formal procedure for contractualising a mission.
	Intermediary (0/4)	Indicates the potential of the organisation to act as an intermediary between the consultant and a third party.
Concerning ICT project management	Strategy (0/4)	Indicates the maturity of project management strategy within the organisation.
	ICT skills (0/4)	Level of information and communication technology of skills within the organisation.
	Need better(-4/0)	Level of desire expressed for improved project management.

Figure 5.9 : Criteria for pseudo-quantitative market characteristic analysis.

Values were then assigned to each criteria for each of the 54 prospective clients included in this study. By using a spreadsheet to create the pseudo-quantitative analysis matrix, data could be sorted and resorted in many different ways so as to uncover the correlations between the criteria.

To facilitate this search for correlations, a colour system was deployed on the value matrix to colour each value according to its importance. The colours are explained in figure A.2. In general, the negative aspect of the characteristic was coloured red, going all the way to white for the positive aspect.

5.4.2. The correlations between the criteria

This section presents the most significant results of this exercise grouped by domain of activity for the *external characteristics* of the prospective clients.

It is worth noting that the method presented here has its limits in that no correlation of similar significance as that for *external characteristics* was found for the criteria of the characteristics *use of consultancy* and *ICT project management*. A more complex statistical analysis could possibly uncover one but, in that case, it would probably also be necessary to review entirely the quality of the assigned values and perhaps even rerun the study with a section of quantitative multiple choice answers in the questionnaire, for example. This would be outside of the scope of this study which is more concerned with the development of simple tools for a consultancy practice.

In figure 5.10, the distribution of values by domain shows, for example, that few organisations in the field of food processing are active internationally.

This figure also shows a significant coherence for the criteria of the communications network operators: most of the operators are of significant size, are active internationally in multi-site and multicultural configurations. These operators are undergoing, on average, fairly significant restructuring, information which is in accordance with business issues subsequent to the bursting of the Internet “bubble” around the year 2000.

Averages

	Growth (-2/+2)	Size (1/5)	International (0/4)	Intercultural (0/4)	Multi-site (0/4)	Restructuring (-4/0)	Innovation (0/4)
Coordination	0	1	1.14	1.86	0.86	-0.86	0.71
LegalAdmin	1	2.67	1.33	2	2.67	-1.33	1.67
FoodProc	-0.33	2.33	0	1.33	1.33	-1.67	1
Other	0.67	2	0.67	1.5	1	-1.17	0.83
Operator	0.2	4.8	3.6	3.8	3.8	-3.2	3.2
ICT maker	0	3.63	3.13	3.13	2.5	-2.13	3.13
ICT services	0.36	2.64	1.77	2.09	1.14	-0.82	0.73

Figure 5.10 : The value averages by domain of activity.

The ICT makers seem to imitate the distribution of the network operator values, although to a lesser degree.

The analysis of the numbers of clients by value of their criteria is presented in the figures 5.11 to 5.14 for the four most significant domains of activity of the study. It has already been noted (see fig. 3.1) that over one third of the organisations participating in this study are involved in ICT services. Figure 5.11 shows little growth for this set of organisations with, in general, also little activity internationally (see “A” in fig. 5.11). However, they are also more stable than the operators, with little restructuring this year (see “B”). Unfortunately, there are also very few who innovate (see “C”).

Figure 5.12 shows that coordination organisations are all of small size, with little geographical spread, but also stable and often involved in the activities of innovation.

ICT services

Growth (-2/+2)	Size (1/5)	International (0/4)	Intercultural (0/4)	Multi-site (0/4)	Restructuring (-4/0)	Innovation (0/4)
2	5	4	4	4	0	4
2	1	1	1	0	13	0
8	4	8	9	5	4	1
9	7	5	6	4	2	4
2	6	1	3	2	2	5
1	4	7	3	11	1	12
-2	1	0	0	0	-4	0
22	22	22	22	22	22	22

Figure 5.11 : Distribution of criteria by numbers of ICT service organisations.

Coordination

Growth (-2/+2)	Size (1/5)	International (0/4)	Intercultural (0/4)	Multi-site (0/4)	Restructuring (-4/0)	Innovation (0/4)
2	5	4	4	4	0	4
0	0	0	0	0	3	0
0	0	0	0	0	3	0
7	0	1	1	1	0	1
0	0	6	6	6	1	6
0	7	0	0	0	0	0
-2	1	0	0	0	-4	0
7	7	7	7	7	7	7

Figure 5.12 : Distribution of criteria by numbers of coordination organisations.

Figure 5.13 confirms the observation of the averages in fig. 5.10 concerning the international activity of the ICT makers and their tendency for restructuring.

Growth (-2/+2)	Size (1/5)	International (0/4)	Intercultural (0/4)	Multi-site (0/4)	Restructuring (-4/0)	Innovation (0/4)
ICT maker						
2	5	4	4	4	0	4
0	2	4	3	2	1	5
3	2	3	3	2	1	0
2	3	0	2	2	4	2
3	1	0	0	2	0	1
0	0	1	0	0	2	0
-2	1	0	0	0	-4	0
8	8	8	8	8	8	8

Figure 5.13 : Distribution of criteria by numbers of ICT makers.

As already noted in fig. 5.10, out of the four domains of activity, the most significant correlation was observed for the major international communications network operators. As shown in figure 5.14, they are almost all in the throes of significant restructuring.

Growth (-2/+2)	Size (1/5)	International (0/4)	Intercultural (0/4)	Multi-site (0/4)	Restructuring (-4/0)	Innovation (0/4)
Operator						
2	5	4	4	4	0	4
0	4	3	3	3	0	3
1	1	2	2	2	1	2
4	0	0	0	0	0	0
0	0	0	0	0	1	0
0	0	0	0	0	3	0
-2	1	0	0	0	-4	0
5	5	5	5	5	5	5

Figure 5.14 : Distribution of criteria by numbers of network operators.

This ends the detailed results and analysis of this study.

6. General Observations

The most significant areas for prospective client needs, noted in the analysis in chapter 5, include support with team integration and for internal restructuring. This is particularly the case for major international communications network operators and ICT makers.

The good news is that, to a greater or lesser degree, innovation and application of their ICT skills can help these organisations through the difficult period. This latter correlation can be seen in the overall data presented in figure A.1, which has been sorted by *international* and *multicultural* criteria and also shows the strong correlation between international activity and restructuring.

One general observation of this market which has not been noted yet, is the difficulty for small consultancy outfits to approach these larger clients. Indeed, the relationship between corporate IS (Information Services) departments and ICT services firms has become more complex over recent years. The rationalisation and the industrialisation of the procurement process has complicated the relationship between these big clients and their consultancy suppliers (see 8.2, pp.14-15).

One remark concerns the recent, more stringent application of work laws, causing the ICT services market to reorient from people management to project management. That is, consulting engineers intervene *alongside*, and not within, the client system. This is an improvement which allows for more pertinent consulting.

Another general observation during this study was the tendency of organisations undergoing restructuring to be identified as Early

Adopters prior to the interview and to have this identification changed to Mainstream or Conservative, after the interview.

Finally, concerning the word “international”, whilst interviewing prospective clients for this study, it became clear that there is an increasing interest in international projects but that the word itself must not be mentioned explicitly because it generates a negative reaction, as if refering to something desirable but unattainable.

7. Conclusions

In terms of the objectives set out in chapter 2, this study represents a significant achievement. Despite modest ambitions, a number of simple but effective analytical tools have been developed and used in the analysis presented in chapter 5. The observations gleaned from successive layers of analysis show general timidity towards consultancy but also some major opportunities for action amongst the big players in the informatics and telecom fields.

One challenge which remains for the independent consultant who wishes to approach these large client organisations is to identify the “side door” for accessing missions for which they have pertinent service offers. The front door, we have noted in chapter 6, is protected by a highly procedural procurement system.

The main companies active in the field of ICT are tending towards the multicultural and are also restructuring, which suggests an essential message from this study: temper the procurement department’s desire to simplify consultancy to a daily fee, in exchange for the cultivation of a flexible and powerful support resource which is both context specific and project-oriented.

7.1. Suggested Actions

In the field of ICT support, the consultant can conclude from this study that they need to focus their efforts on the large ICT operators and manufacturers.

Consultancy qualities required to succeed in the current context include:

The ability to add value in multicultural, innovative and geographically-spread situations, where there is much restructuring in progress.

Concerning the communication strategy for such consultancy practice: the information on the client's approach to the word "international" is of crucial importance and indicates that, in conversations, presentations, on web sites, brochures, etc., care must be taken to avoid explicit reference to this word.

8. Bibliography

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(8.2) Le Monde Informatique, *N° 1094 of 9th December 2005*

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A. Appendices

A.1. Names of Contributing Organisations

Many thanks go to the representatives of the following organisations who accepted to be interviewed for this market study. (A number of names of prospective clients are not identified in honour of their wish to remain anonymous).

ANVAR (Rennes)
BST Charrier
Cabinet Vidon
CCI Rennes
Cegos
Coface
Crédit Agricole
EDF GDF
Elles Formation
ESC (Rennes)
FÁS (Dublin)
La Belle Iloise
Leclerc
Lucent Technologies
Ouest France Multi-Media
Silicomp-AQL
Sprint
Thales
TI Automotive
Triballat

A.2. Broad Correlation in Data

The data in figure A.1 has been sorted to show the correlation between the characteristics of *Size*, *International*, *Intercultural*, *Multi-site* and *Innovation* and the inverse correlation with the characteristic of *Restructuring*. This is analysed in section 5.4.2 and chapter 6.

Type	Enterprise class	External characteristics							Consultancy				Project mgt.		
		Growth (-2/+2)	Size (1/5)	International (0/4)	Intercultural (0/4)	Multi-site (0/4)	Restructuring (-4/0)	Innovation (0/4)	Freq. used (0/4)	Freq. desired (0/4)	Procurement blocking (-4/0)	Intermediary (0/4)	Strategy (0/4)	ICT skills (0/4)	Wish to improve (-4/0)
Conservative	Other	2	2	0	0	0	0	1	0	0	-1	0	1	0	-2
Conservative	ICT services	1	2	0	0	0	0	0	1	1	0	3	2	2	-1
Conservative	ICT services	0	1	0	0	0	0	1	0	0	0	2	3	2	0
Mainstream	ICT services	1	2	0	0	0	-1	2	1	0	0	0	1	4	-1
Reference	ICT services	0	2	0	1	0	0	1	1	0	0	1	1	1	-2
Mainstream	LegalAdmin	0	3	0	1	2	-1	2	2	2	-1	1	2	1	0
Mainstream	ICT services	-1	1	0	1	0	-1	1	1	2	0	2	0	3	-3
Reference	ICT services	0	1	0	1	0	0	2	1	1	0	3	4	3	0
Conservative	Other	1	2	0	1	1	-1	1	1	0	0	0	1	3	-3
Mainstream	Food process	0	3	0	1	1	-1	1	0	0	0	0	3	1	0
Conservative	Food process	-1	2	0	1	1	-3	1	2	2	0	0	1	0	-3
Reference	Coordination	0	1	1	1	1	0	0	1	1	0	2	2	1	-2
Conservative	Coordination	0	1	1	1	0	-1	0	0	0	-3	3	2	3	-2
Reference	Coordination	0	1	1	1	0	0	0	1	1	0	2	2	1	-1
Reference	ICT services	1	2	0	2	0	0	2	1	1	0	1	3	4	0
Conservative	Other	0	1	0	2	0	0	0	1	1	-1	2	2	2	0
Conservative	LegalAdmin	1	3	0	2	3	-2	2	2	1	-2	0	1	1	0
Mainstream	Food process	0	2	0	2	2	-1	1	2	2	0	0	3	2	-3
Reference	Other	1	3	0	2	2	-1	0	2	3	-4	0	1	2	-3
Conservative	ICT maker	0	2	0	2	1	0	1	1	0	-1	0	1	3	-3
Conservative	Coordination	0	1	1	2	1	-3	2	3	3	0	3	3	2	-3
Reference	Coordination	0	1	1	2	1	0	0	1	1	-1	3	2	3	-1
EarlyAdopter	Other	-1	2	1	2	2	-2	0	1	1	-1	1	1	3	-1
Conservative	ICT services	0	3	1	2	1	0	0	1	1	0	1	1	3	-2
Mainstream	ICT services	1	2	2	2	0	0	3	1	0	0	2	3	4	0
Conservative	ICT services	1	2	2	2	0	-2	0	1	1	-3	3	2	3	-2
Reference	ICT services	-1	3	2	2	0	0	0	1	1	0	2	3	3	0
Mainstream	Other	1	2	3	2	1	-3	3	1	2	0	1	1	4	-3
Mainstream	ICT services	0	3	3	2	2	-1	0	1	1	-1	3	2	3	-2
Conservative	ICT maker	-1	3	3	2	3	-2	2	2	2	-3	1	2	3	-1
Reference	Coordination	0	1	1	3	2	-1	2	2	2	0	3	2	3	-1
EarlyAdopter	ICT services	1	3	2	3	2	0	0	3	2	0	4	2	2	-2
Reference	Coordination	0	1	2	3	1	-1	1	1	1	0	2	2	1	-2
Conservative	ICT services	0	3	2	3	2	-3	1	1	0	0	3	2	4	-3
Mainstream	ICT services	0	4	3	3	3	0	0	2	1	0	2	2	2	-2
Conservative	ICT services	2	4	3	3	3	-1	0	1	0	-1	2	2	3	-2
Conservative	Operator	0	4	3	3	3	-1	3	4	3	-4	0	2	3	-2
Conservative	ICT services	2	3	3	3	2	0	0	1	0	0	2	2	3	-1
Conservative	ICT services	1	1	3	3	0	-3	0	1	0	0	3	2	3	-2
Conservative	ICT maker	0	3	3	3	1	-1	2	2	1	-3	1	3	4	-1
EarlyAdopter	ICT services	1	4	3	3	3	0	1	1	1	0	3	3	4	0
Conservative	ICT maker	1	3	3	3	2	-2	4	2	2	-4	0	1	4	-3
EarlyAdopter	ICT services	0	4	3	3	3	0	0	1	1	0	3	2	3	-2
Reference	ICT services	0	3	4	3	1	-2	0	3	2	0	2	2	3	-2
Conservative	ICT maker	1	4	4	3	2	-4	4	2	2	-4	1	3	4	-1
EarlyAdopter	LegalAdmin	2	2	4	3	3	-1	1	2	2	0	0	1	3	-3
Mainstream	Operator	1	5	3	4	4	-4	4	1	3	-2	0	4	3	-1
Conservative	ICT services	-2	5	3	4	3	-4	2	1	1	-1	3	3	3	-1
Mainstream	ICT maker	-1	5	4	4	4	-2	4	1	2	-3	0	3	4	-1
Conservative	ICT maker	1	4	4	4	3	-2	4	1	2	-1	2	2	4	0
Conservative	Operator	0	5	4	4	4	-3	4	3	3	-4	1	3	4	0
EarlyAdopter	ICT maker	-1	5	4	4	4	-4	4	1	1	-2	1	4	4	-1
Mainstream	Operator	0	5	4	4	4	-4	3	1	2	-2	1	3	3	-2
Conservative	Operator	0	5	4	4	4	-4	2	1	0	-2	1	2	3	-3
		54	54	54	54	54	54	54	54	54	54	54	54	54	54

Figure A.1: Raw data sorted by "Intercultural", then by "International".

2	5	4	4	4	0	4	4	4	0	4	4	4	0
4	7	9	8	6	19	7	1	0	29	1	3	13	12
16	7	14	16	10	15	4	4	5	10	13	14	24	14
26	14	6	16	11	8	11	12	15	5	13	23	8	16
7	14	8	10	12	6	13	33	20	5	13	13	7	12
1	12	17	4	15	6	19	4	14	5	14	1	2	0
-2	1	0	0	0	-4	0	0	0	-4	0	0	0	-4

0	2	4	5
-1	1	3	4
-2	0	2	3
-3	-1	1	2
-4	-2	0	1

The column headings in figure A.1 specify the Characteristics for which scores have been assigned on a scale of five possible values. The range of this scale is defined in the parentheses following the column heading. Figure A.2 describes the significance of the value ranges. The assigning of values is described in section 5.4.1.

Range		**Significance**	**In colours**				
"(1/5)"	from 1 to 5	The characteristic is always present to a greater or lesser degree.	1	2	3	4	5
"(0/4)"	from 0 to 4	The characteristic is not always present.	0	1	2	3	4
"(-2/2)"	from −2 to 2	The characteristic is not always present and can carry a positive or negative significance.	-2	-1	0	1	2
"(-4/0)"	from -4 to 0	The characteristic is not always present. When it is, it is often perceived as a negative quality.	-4	-3	-2	-1	0

Figure A.2: Definition of score scales applied to client characteristics.

j.emery@in3co.com www.in3co.com