

The Development and Professionalisation of the Italian Consultancy Market after WWII

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“Professionalism” has always been a problematic concept, especially for the social implications that it involves. In fact, it has often been associated with that kind of “power” that enables professionals to gain control of their own training, to decide about admission to their practice and to evaluate the standards of their own performance [Wilensky, 1964; Friedson, 1994]. In other words it enables professionals to have the exclusive control of their own work and its contents on the base of a knowledge differential between them and outsider institutions.

This issue of professionalism is particularly relevant for management consultancies for at least two main reasons. First of all because management consultancy is an intangible product whose real value and quality are almost impossible to judge *ex ante*. This is largely due to the nature of consulting itself. In fact, it is a very secretive market (characterised by trust relationships and strict professional secrets) with information asymmetries (consultants and clients never share the same amount of information) and low transparency, for example due to language barriers naturally entailed in the very technical consulting terminology almost indecipherable to clients [Crora, 1986; Pennarolou, 1988; Kieser, 1998]. Secondly, professionalism is an issue because consultancy markets have generally low entry barriers, both in terms of capital and certification required for setting up a consulting firm. Professionalism, in the consultancy markets, should therefore act as a guarantee of quality, integrity and competence. In this respect the role played by the professional associations should stand out as a kind of “double-action filter,” that is to say granting good quality services for clients and protecting the profession’s reputation thus creating a kind of positive, self-reproducing interaction between the parts.

Italy is a late developer in the use of management consultants, and this together with some nation-specific peculiarities (such as its high fragmentation, and the co-existence of very different consultancies and professional associations) makes it an interesting case to study in this respect. As it has often been

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pointed out by business historians, Italy lacked a developed and diffused managerial culture because of well-rooted patriarchal tradition based on hierarchies and on the absence of division between ownership and control [Pavan, 1976; Amatori, 1997]. For these reasons a real take-off of the management consultancy market was late to occur and eventually evolved as one of the most singular in Europe.

Starting from these observations which add more complexity to the already problematic nature of management consultancy, after having described the evolution of the Italian consultancy market and of the professional associations, this paper will try to suggest if and how the Italian consulting market can be considered as professionally formed. Particular attention will be given to the professional associations and the role they played in shaping the organisation of the Italian consulting market as it appears at present. In order to carry on this evaluation, three main aspects will be considered as professionalism indicators: quality, ethics and professional contents.

A Brief Overview of the Italian Consulting Market and its Evolution

Italy can be considered as a late comer concerning the development of management consultancy, compared for example to consultancy activities in Britain and France [Kipping, 1996]. In fact, even if the first consulting societies in Italy date back to the middle 1920s mainly as a consequence of the diffusion of the scientific management principles in Europe, a more sustained development of the market took place only from the 1950s. It is from this period on that the number of national and foreign consultancies starting their activity in Italy multiplied. Not by chance, in the same years, the first business schools were opened in Italy, with the declared aim of “trying to fill the gap of managerial knowledge existing between Italy and the U.S.” [Faliva and Pennarola, 1992, p. 30]. Accompanying the “booming” Italian economy and the need for increasing industrial efficiency the consulting market continued its growth during the following decade too, as shown by the proliferation of consulting societies offering different kind of practices.

A very peculiar feature of the Italian consulting market started to become evident from the end of the 1960s: the high fragmentation of the consultancy supply. The most frequently used explanation of this phenomenon presents fragmentation (meaning the diffusion of numerous small consultancies, sometimes with only one consultant) as a result of repeated spin-off phenomena [Lo Bianco, 1988; Faliva and Pennarola, 1992; Martini, 1997]. This reaction was often generated by imbalances of power and responsibilities inside large consulting groups, or by a strong desire (manifested by many consultants) to set up their own societies according to their personal interpretations of what the profession should be like. Some famous examples can be mentioned: from McKinsey derived Cuneo & Associati (today Bain-Cuneo), from the Pietro Gennaro & Associati derived Gea, from Progreddi the Galgano & Associati, etc. [Faliva and Pennarola, 1992].

After the first difficult years, the 1970s saw another significant wave of growth for the consulting market. This was mainly due to the expansion of the consulting demand, both in terms of services and in terms of clients. In fact, gradually the Italian public administration, the services sector and the small medium enterprises started to require consulting interventions. The result was that this diversification in consulting demand prompted a qualitative and quantitative development of the consulting offer [Pennarola, 1988; ASSO, 1988].

The second economic boom in Italy (1980-86) was a boom for management consultancy too. Estimates based on a survey including 262 consulting firms employing 3390 consultants show that more than 60% of the Italian consulting firms existing in 1990 were created after 1980 [ASSCO, 1990, p. 23] and that their number doubled in the period 1985-87 [ASSCO, 1990, p. 6]. From the 1980s onwards this fragmentation trend in the consulting sector was also "fuelled" by the entrance of numerous freelance consultants. They had been in the great majority of cases top managers in other sectors and after having retired (or been made redundant) started their new activity as consultants, mainly for small-medium clients. This "anomalous presence" resulted very difficult to control and was also a source of confusion for clients, which had to deal with rather different "experts." From this moment on certification became a primary concern for this sector, including associations consultancies and clients [Rossi, 1997; Zanframundo, 1997; Butera, 1998].

An opposite trend to this extreme division of the consulting offer started to manifest itself from the 1980s and continued throughout the 1990s. It was "polarisation," that is to say on the one hand, the concentration of market-shares of a few large companies, most of them foreign. In this respect, in 1995, the first twenty consultancies in Italy covered (according to estimates of industry experts) the 74% of the market [ASSCO/MCI, 1995]. On the other hand there was a persistence and proliferation of small-medium consulting firms, again mainly generated through spin-offs. Their response to larger consultancies' competition was networking, co-operative alliances aiming at offering a wider range of services. These webs (formed by consultants but sometimes also by universities) have been growing in Italy and their competitive advantage has been identified in "flexibility" [Fronterre, 1991; Butera, 1998].

From what has been said some points emerge as characterising the history of the Italian consulting market. Its late development and the national cultural diffidence towards the managerial approach to business organisation delayed the take-off of management consultancy in Italy. Despite this swinging start, there has been a partial catch-up of the Italian consultancy market within Europe. FEACO (the European Federation of Management Consulting Associations) survey on management consultancy markets classified Italy as the sixth European market in 1997 [FEACO, 1997, p. 2]. In this sense, despite the progress made, it appears difficult to be optimistic about a reduction in the disorder that pervades many aspects of the Italian consultancy market. The co-existence of such diverse operators in the same market or the difficulty in

evaluating the different consultancies (and consultants) and the quality of their performances seem to indicate that, maybe more than others, the Italian consulting market needs “professionalism.” Professionalism intended as “double filter” acting internally and for the profession (purging disqualifying behaviour, promoting continuous training, etc.) as well as externally and for clients (checking and granting services’ quality, etc.). Professional associations are the other reality that needs to be considered in this regard.

The Development of Professional Associations

The origins of the first professional consulting association in Italy are closely connected to the take-off of the consulting market. ASSCO, Associazione tra Società e Studi di Consulenza di Direzione e Organizzazione, was created in 1960 from the initiative of some experienced consultants, like P. Malinverni (Orga), P. Gennaro (PGA), E. Ottone (Sior), etc. Its primary aim was defending the profession from George S. May-like experiences which, sending around non-qualified consultants selling inappropriate solutions, could have thrown a bad light on the whole market thus mining its possible development (similarly, the U.S. association ACME was set up in 1929 also with respect to May).² ASSCO was created as a quality name and its exclusivity was based on and granted by precise standards, fixed to join the association. To become a member, a firm should have been operating in consulting for at least three years, it should have had at least four full-time consultants, a proportionate turn over and significant references by clients [Faliva and Pennarola, 1992, p. 78]. The premise to ASSCO ethical code affirmed that the association’s aims were gathering the consulting firms in Italy, diffusing the best management practices and the value of consulting, determining, diffusing and protecting an ethical code, sustaining consultants’ training and creating links with similar foreign associations [ASSCO, 1988].

Following the multiplication of consultants in Italy during the 1960s, a second professional association was formed in 1968, APCO, Associazione Professionale Italiana dei Consulenti di Direzione e Organizzazione. APCO is, in fact, the association of management consultants as individuals, disregarding the companies they belong to. Similarly to ASSCO, APCO Statutes affirms the will of representing and certifying management consultants, promoting studies and research, training workshops, conferences as well as publishing materials in order to improve the professional knowledge of its members, fixing a specific ethical code and establishing relationships with similar Italian and foreign associations [APCO, 1996].

As a consequence of another expansion in the consulting market, in 1988, a third national association was formed. AICOD (Associazione Italiana Imprese di Consulenza Organizzativa e Direzionale) with the direct participation of Confindustria (the Italian Industry Confederation) and it was set up to

² For more details on George S. May and its expansion to Europe see Kipping, 1999.

represent mainly small Italian consultancies, which were increasingly becoming regional or even local entities, rooted in their own environment. Another interpretation of AICOD's origin is that small Italian consultancies did not find an appropriate representativeness inside ASSCO, because it was "too often concerned in satisfying larger consultancies' need and not concerned enough about Italian smaller groups" (interview held by the author with one of AICOD's founders). Under the slogan "saper essere/saper fare" (being able to be/being able to do) AICOD promoted various information and training initiatives, promoted aggregation among its members in consortium-like forms and promoted the development of Territorial Delegations in many Italian regions.

Once again, as it had happened in 1960 for ASSCO and in 1968 for APCO, AICOD was the result of a particularly dynamic and tense growth in the Italian consulting market. The fact that, throughout the 1980s and 1990s, plenty of associations (like AISO, Associazione Italiana Società di Outplacement or ATEMA, Associazione per il Temporary Management, etc.) were born following the diversification of management consultancy services, seems to confirm that, in the Italian consulting market, individual affirmation (or representation) has proven to be stronger than co-operative approaches.

On the other hand, the proliferation of new associations was not only due to fragmentation, because in some cases the creation of new associations was linked to aggregation attempts. This was specifically the case of FITA (Federazione Italiana Terziario Avanzato), created in 1982 by various existing associations in the services sector (like ASSCO) with the aim of gathering more professional groups in the advanced services sector, to reach a higher degree of representation in dealing with external institutions.

Recently, in 1996 ASSCO and AICOD merged forming ASSOCONSULT (Associazione delle Società di Consulenza Direzionale e Organizzativa), which became "the only association of management consultancy entrepreneurs within Confindustria, present all over the national territory through its Regional Delegations and gathering, according to its own estimates, the 80% of the Italian consulting societies" [ASSOCONSULT, 1997, p. 2]. APCO and ASSOCONSULT are today the two major and most influent consulting associations. The fact that they pursue very similar goals and that many consultants are members of both the associations at the same time may suggest that a future merger between the two might be possible, representing an attempt to reverse the previously described fragmented situation.

Despite these exceptions the simultaneous presence of various professional associations is far from decreasing; the unanswered question is, therefore, why professional associations, instead of trying to eliminate (or to diminish) this confusing fragmentation of the market, chose an almost identical pattern. The same individualistic syndrome that generated so many spin-offs among consulting firms seems to have repeated itself among professional associations. It then results very hard to judge whether this associative pluralism is a limit (in the sense of an imperfection) or a need generated by the market itself.

The Role and Achievements of Professional Associations

Generally speaking, if profession can be interpreted as synonymous with occupation, that is to say a specialised work by which one gains a living in an exchange economy, professionalism has deeper implications. According to Friedson, professionalism has some specific elements that are “committing to practising a body of knowledge and skills of specific value and to maintaining a fiduciary relationship with clients” [Friedson, 1994, p. 200].

Moving from Greiner and Metzger’s definition of management consultancy as a service of assistance provided by particularly trained and qualified people which, objectively and independently, assist clients to identify and analyse problems, recommend and realise solutions [Greiner and Metzger, 1983], the next step of this work will be trying to verify the existence and the nature of professionalism in the Italian consulting market. In order to do this, the role played by the associations will be considered in respect to what, it is suggested (and emerges from the literature on this topic) constitutes the essence professionalism itself. Reference will be made to:

- their commitment to improve specialistic knowledge and skills (“quality concern”)
- their commitment to establish standard behavioural codes (“ethics concern”)
- their commitment to protect and promote the consulting profession (“professional concern”).

The background question that pushes this analysis is, do (or can) professional associations contribute to the professionalisation of an occupation? Some elements like “colleagueship,” “protective and self-corrective functions,” “standards and reward setting,” “the educational contributions of professional associations - both inside the occupation and outside - directed towards clients and the public at large” suggest that “the importance of professional associations for professionalisation seems quite plausible” [Vollmer and Mills, 1966, p. 195]. From these premises, an attempt to answer the previously set question will evolve around the three mentioned “quality,” “ethics” and “professional” concerns and their meaning for management consultancy.

“Quality Concern”

As quality concern are intended those initiatives and activities undertaken by the associations with the precise aim of qualifying the consulting profession and assuring the value of its contents. Given the particular nature of management consultancy as a service quality stands out as a prior need for the profession. Qualification, competence, training and certification appear as constituting elements for consulting recognition as an established professional category. This problematic is particularly relevant in Italy, where the term consultant is very often a synonymous of someone working generically under collaboration contracts.

More specifically it is possible to identify two main areas of activities supported by the professional associations in “defence” of quality: one dealing with qualification and training, the other centred around certification. APCO and ASSCO (later ASSOCONSULT) have always promoted formation and training among their members. APCO, for example, holds regularly a formation course called “Management Consultant: profession, consulting process, key factors and instruments.” It is addressed to consultants (to update their competencies), managers (to become internal consultants) and junior consultants (as part of their training) [APCO, 1996]. More recently ASSOCONSULT is projecting a formation course on line called “The District of Consulting.” It will be run through the association’s web site and it aims at providing continuous training and formation to its members at very low costs (ASSOCONSULT web page <http://www.assoconsult.org>).

Despite these efforts, not all these initiatives have been equally successful in terms of real benefits for consultants. In fact, if formation initiatives were really useful for small-medium consultancies, which lack capital and size to be autonomous in this, they were of little use for larger or international groups that have internalised these functions. On the other hand, market surveys and empirical research, whose results could be more useful to large consultancies, have decreased sensibly (the last known ASSCO survey about the Italian consulting market dates back to 1992).

Certification is increasingly becoming a “weapon” for both the qualification and the protection of the consulting profession. The number of “certified” consultants is growing quickly in Italy, also thanks to the attention drawn to this issue by the professional associations. APCO and ASSOCONSULT have co-operated to a legislative proposal, Norm UNI 83.00.001.0, aiming at “defining and classifying requisites and offer of management consulting services” [Libelli, 1996, p. 80]. Certification is also considered a means to improve the often problematic relationship between clients and consultants. C. Antonelli (president of APCO) sustains that “the consulting service must respond to the need of more transparency in the client/consultant relationship and in the evaluation of the service” [Antonelli, in Libelli, 1996, p. 80].

For what concerns “quality” therefore, the major achievements have been the services targeted for small-medium consultancies, which through professional associations have reached higher visibility training and credibility. On the large consultancies’ side, those benefits appear much lower. This could also partly explain the absence of many prestigious names from membership lists.

“Ethics Concern”

Another critical element that distinguishes professionalism lies in the nature of the relationship between clients and professionals. Knowledge is the discriminating element between the parts and it generates their dependent and fiduciary relationship. As Friedson suggests “clients of professionals must

place more trust in them than they do in others ... Professionals are expected to honour the trust that clients have no alternative but to place in them” [Friedson, 1994, p. 201]. The relevance of these aspects can be explained because of the importance of “credibility” for management consultancy. Credibility is indeed an invaluable resource playing an essential part in the foundation of trust relationships between clients and consultants, as well as in the promotion of professional image.

Professional ethics is in fact the other big stone on which management consulting associations have tried to build their role. It involves many relevant aspects like credibility, reputation and trust; “serious consultants are aware of the fact that ethics is a fundamental requirement to bring clarity into the market and to protect the image of qualified consultancy” [ASSCO, 1990, p. 208]. Attention for this ethical concern appears in both the professional associations’ statutes and it is presented as a mean of improving professional qualitative levels and as a defence against discrediting behaviours.

Again, it’s difficult to evaluate the degree of success or disappointment achieved by the associations in this respect. If it could be affirmed that a standardised ethical behaviour is diffused among their members, there are supposedly many consultants that are non-members and therefore not ethically controllable. Despite this, as trust-relationships and interpersonal contacts are the base on which work is obtained, ethics is a self-affirming necessity for consultants. This seems even more relevant for Italy, where the market is not so wide and most of the consultancies work in relatively small environments where everyone knows everyone else.

“Professional Concern”

“Professionalism entails commitment to a particular body of knowledge and skills both for its own sake and for the use to which it is put - that is to say, commitment to preserve, refine and elaborate that knowledge and skills...” [Friedson, 1994, p. 210]. Professionalism in these terms has always been a fundamental element for professional associations, whose main purpose is the development and qualification of the consulting sector. This process has involved various aspects, like the promotion of internal communication and reciprocal knowledge among members, as a possible way to develop common interest initiatives and to reinforce a “common identity” within the sector and to reduce suspiciousness and diffidence. Information exchanges within and outside the associations have been another effort covering a wide range of different activities. First of all this includes the exchange of know-how and market information among members and with other national and foreign associations. Secondly, professional associations have often promoted debates with outsiders, like entrepreneurs’ associations, political representatives and journalists in order to gain visibility and recognition for the consulting profession. Other steps have been acting as institutional representatives to sustain the professional image (like in the legislative debate for the recognition of new pro-

fessions) and monitoring the market to suggest professional opportunities, for example through contacts and comparisons with wider organisations.

Consultants' opinions about the above mentioned activities appear in many cases favourable to the associations. L. Malinverni, for example, underlines ASSCO's contribution in "bringing consultants around the same table...facilitating information and know-how exchanges...giving to its member an international passport (like FEACO) and sensibility" [ASSCO, 1988, pp. 196-99]. A. Galgano shares the same opinion stating "I really owe a lot to ASSCO for the international contacts it gave me" (he was twice president of FEACO) [Faliva and Pennarola, 1992, p. 90]. A significant number of consultants from small-medium societies (interviewed in December 1998) confirmed their satisfaction for having reached visibility and good credentials in the Italian market. Last but not least statistical surveys show that both of the associations' members have increased during years, testifying to the relative affirmation in the Italian consulting environment.

Having "merits" does not imply being "fault-free" and of course it is possible to discern some limits in the consulting professional associations' achievements. Once again consultants themselves point out some of these limits. Malinverni refers to the fact that, "despite ASSCO promoted co-operation among its members, no official important project has ever been carried on jointly by more consultancies" [ASSCO, 1988, p. 197]. Some others underline the fact that the existent associative pluralism could be a source of confusion, especially for clients, who could not understand why, for example, there are different certifications for consultants and consulting firms and which one has more credibility. Large consultancies (that do not need to look for visibility, credibility or training joining the associations) regret the fact that professional associations do not play a more active role in the diffusion of information or promotional activities (opinions collected in interviews with various consultants).

An overall evaluation about the professional associations and their role in the development of professionalism within the Italian consulting sector is quite hard to give because of the lack of homogeneity in the results they achieved. It seems that the diffusion of professionalism in terms of "quality" has been only partial, meaning that it has been successful on the small-medium consultancies' side but not really satisfactory for larger consultancies. Professionalism in terms of "ethics" is perhaps the field where achievements appear more standardised, but an important reason behind this is a natural censorship arising from trust-relationships. In a relatively small market in fact, once the professional reputation is ruined, clients are lost immediately. The "professional concern" is maybe the issue where associations' role appears more controversial. Positive results have been the introduction of an international dimension (through foreign associations) and the effort in diminishing confusion about what management consultancy is and what it is not. Something has been done to promote internal communication, information flows and common initiatives, but eventually it was not enough to generate a real co-operative culture

(or approaches) among management consultancies in Italy and individualistic attitudes appear still dominant.

Conclusions

The whole picture of the Italian consulting sector shows some peculiar traits that have influenced its professional development. The co-existence of many different consultancies, clients and geographical markets must be taken into consideration when trying to evaluate the achievements and failures of the professional associations in contributing to the professionalisation of the consulting market. From what emerges, it could be concluded that despite professional associations' efforts the results achieved in diffusing professionalism within consulting have not always been completely satisfactory. One possible explanation could be found in the hypothesis that sometimes associations have tried to justify their presence creating and maintaining a kind of lobby for their members, which for the fact of fulfilling their membership requirements appear able "to perform more professionally than others" [Kyrö, 1995, p. 229].

On the other hand, it may also be possible to suggest that some of the identified limits or failures in the associations' activities would appear much clearer if read within the wider Italian consulting picture. The pluralism of associations has emerged as a confusing element, especially for clients and this fact reflects an innate limit of the market itself. In fact, considering the fragmentation of the whole Italian consulting market, it seems possible to deduce that not even the professional associations, which in their nature are co-operative institutions, have been able to push a change in this attitude. This situation could be slowly changing because very recently networking culture has entered the Italian consulting sector as a recognised organisational solution. Some doubts have been raised about the research activities and information exchanges promoted by the professional associations. It is true that there are many gaps in the knowledge about the Italian consulting market that the associations could have covered more systematically. But, on the other hand, it should be taken into account that research implies costs (and the associations' incomes are mainly membership fees) and availability of information (while in many cases consultants themselves are not willing to disclose their "secrets"). Despite the efforts made, like setting up Regional Delegations, some parts of the Italian consulting market are not as much known as others. This is indeed a real problem for the whole consulting reality in Italy and not only for the associations. Even if the situation seems to be slowly improving there are still many regions, especially in the South of Italy, that are not still completely developed consulting entities, where certification is lower and membership in associations too. In this sense it could be said that there is a quite close correspondence between the limits of the consulting market and those of the associations' activities. Worries arise from the fact that both appear still very far from reaching stable and homogeneous standards able to legitimise manage-

ment consultancy as an expression of professionalism, with its distinctive knowledge, contents and norms.

Both consultants and professional associations' representatives declare themselves optimistic about future positive developments; besides undeniable progress has been made in terms of professionalism from the 1950s up to now. Despite this, it has to be concluded that by the end of the 1990s, the development and professionalisation of the Italian consulting market has only reached a partial success.

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