The U.S. Influence on the Evolution of Management Consultancies in Britain, France, and Germany Since 1945

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In Europe today U.S. management consultancies occupy a dominant position among the largest service providers. In a "league table," published in the *Financial Times* of September 12, 1995, almost all of the top ten and more than half of the top forty European consultancies were of American origin. Over the past few years, many formerly independent national consultancies have been taken over by foreign, mainly U.S., firms [17].

Concerning the historical evolution of the profession, a large part of the relevant literature also highlights the American predominance. The work of Frederick W. Taylor and his followers is very often seen as the origin of consultancy activities [29, 39]. Concerning today's market leaders, Christopher McKenna has recently shown that what he calls "modern" management consultants, i.e. those individuals and firms offering "CEO-level studies of organization, strategy and operations," were not linked to Taylorism. He asserts, on the other hand, the leading role of the U.S. consultancies world-wide. In his view, the growth of firms such as McKinsey during the 1930s in the United States "was the necessary precursor to the predominance of American management consultants throughout the world" [27].

By making this assertion, McKenna perpetuates a long tradition in the popular and academic management literature. In 1967, Jean-Jacques Servan-Schreiber already highlighted the role of U.S. consultancies in spreading an "American-style management that is, in its own special way, unifying Europe" [37, pp. 38-39]. More detailed studies conducted by management researchers in the early 1970s concluded that American consultancies, and especially McKinsey, had contributed significantly to the adoption of the decentralised multidivisional structure in British, French, and German firms during the preceding decade [7, 10]. And in a recent account of the evolution of manage-

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ment consultancies in Western Europe, Alexander Gerybadze characterized the transfer of U.S. consulting methods and firms during the 1960s as the first phase in the European development [13].

However, a comparison with the evolution of management education suggests a more cautious approach. As Robert Locke has demonstrated, the transfer of the U.S. business school model to Western Europe was far from complete and uniform. The different educational traditions and institutions in Britain, France, and Germany influenced the speed and the extent to which the American idea to educate general managers in graduate-level professional schools was implemented in each country. Until today the German science-based education system for example, completely prevented the development of U.S.-type business schools [22].

This article attempts to demonstrate that the same is true for the evolution of management consultancies in Britain, France, and Germany after 1945. It will argue that the transfer of American consulting methods and firms was mitigated by the "systemic context" in each of these countries [23]. This concept from the research on national innovation systems is highly relevant for consultancies, since they are widely seen as one of the important institutions for the production and the diffusion of management knowledge [12]. Among the factors which determined the actual penetration of the American service providers and their methods are the presence and the type of domestic consultancies, the availability of other institutions for the transfer of management know-how, the existing organisational structure of the client firms, and the educational background of managers.

Since the systemic context differs across countries and can change over time, a comparative and evolutionary approach seems most appropriate to identify and explain these observations. The article therefore covers the three largest European countries and is structured in chronological order. It focuses on the post-war period because American influence reached a new height after 1945 in terms of political, military, and economic power, and offered an apparently successful management model. Three major phases are analyzed: the 1950s, characterized by the U.S.-sponsored efforts to increase productivity in Western Europe; the 1960s and early 1970s, when American consultancies arrived in force; and the 1980s, which saw a relative decline of the U.S. management model.

National Patterns in the Immediate Post-War Period

The war-time production efforts and the apparent superiority of American industrial organization had heightened the awareness of European business and political leaders for a need to improve productivity. The immediate post-war period therefore saw an increasing interest in American production methods, which received a considerable boost with the launch of the U.S. Technical Assistance Program as part of the Marshall Plan in 1948. It included study trips of representatives from industry, labor, and government to the United States, as

well as road shows, training programs, and factory visits by American specialists in Europe. Most participating countries established their own productivity centers, and in 1953 a European Productivity Agency (EPA) was created to coordinate their efforts [6, 26, 38].

Many of the European "missionaries" returned full of praise for the American management methods and industrial relations. The adoption of the U.S. management model however, seems to have encountered a number of difficulties during the immediate post-war period [2, 20]. American consultancies' overseas efforts remained largely unsuccessful. The Chicago based firm of George S. May opened offices in London and Düsseldorf during the 1950s, but its ruthless sales tactics caused havoc in the market and inflicted considerable damage on the profession's image.² A number of other firms, for example Arthur D. Little, opened offices in Paris where the Marshall Plan's Special Representative to Europe was located, but failed to establish a permanent presence there.³ The reasons for these failures differed from one country to the next, but were all driven by the respective systemic context.

The main obstacle for U.S. firms in Britain was probably the existence of domestic service providers and their apparent ability to address the needs of their client organizations. At the end of the Second World War, Britain had the most developed consultancy market in Western Europe [39]. It was dominated by four firms which had been established before 1945: Associated Industrial Consultants (1926), Production Engineering (1934), Urwick Orr (1934), and Personnel Administration (1943). All of them experienced considerable growth during the immediate post-war years. Urwick Orr for example, grew from 40 consultants in 1945 to 150 in 1951. Personnel Administration had already more than 100 employees in 1950, only seven years after its establishment. When these four firms founded the Management Consultancies Association (MCA) in 1956, they accounted for about three quarters of a total domestic market estimated at £4 million.

To varying degrees, the "Big Four" had some link with the U.S. consultancy which the French immigrant Charles E. Bedaux established in Grand Rapids, Michigan in 1916 [8, 19, 39]. The Bedaux Company moved its head-quarters to New York in 1920, spread rapidly across North America, and opened its first European office in London in 1926. It is estimated that by 1937 500 American and 225 British firms had implemented the Bedaux system of work simplification and standardization, derived from scientific management. In

²These included unannounced visits and direct media advertising [39, pp. 64-65; 35, pp. 13, 32]. The latter has remained a taboo in the profession, which was only very recently broken by Andersen Consulting.

³This information is based on a few letters from these firms to the Marshall Plan Administration found in the U.S. National Archives (RG 469). With the exception of K. B. White, who had already been operating in France during the inter-war years, none of them apparently left any traces (see below). Arthur D. Little reestablished an office in Paris in 1967 [15, p. 56].

Britain, it met with considerable resistance from workers and supervisors in a number of cases and was widely criticized for simply trying to "speed up" work [21].⁴

From the mid-1930s, the existing consultancies tried to distance themselves from the bad reputation associated with the Bedaux name and system. In 1937, the British subsidiary became largely independent of the Bedaux Company and changed its name to Associated Industrial Consultants (AIC). And while Leslie Orr had been a sales manager at Bedaux before becoming independent in 1934, his partner Lyndall Urwick came from a very different tradition. Originally inspired by Taylorism, he was later influenced by Seebohm Rowntree's ideas of the need for a cooperative relationship between labor and management. After having worked at Rowntree's York factory for six years, he became Director of the International Management Institute in Geneva in 1928 and subsequently one of Britain's most influential management thinkers. When the Institute closed down in 1933, Urwick saw a consultancy as the best way to promote his ideas [39, pp. 32-34].

During the inter-war period, British management researchers had developed human resource approaches rather independently from their American counterparts. These traditions, and with them the domestic consultancies, received a considerable boost in the immediate post-war years [14, pp. 227-253; 38]. From 1945 to 1950 the Labour government provided a very favorable climate for these developments. Stafford Cripps, President of the Board of Trade and since 1947 Chancellor of the Exchequer, played an especially important part in these efforts. Among other things, he promoted the creation of the British Institute of Management in 1947-48 where business and labor representatives could discuss ways to improve management methods. Urwick and three other consultants were invited to become members of its council.

The British consultancies also benefited from a "showcase" intervention at the Musgrave cotton spinning mill in Lancashire, where Production Engineering successfully reorganized the cardroom between January and July 1947 [39, pp. 36-40]. These widely publicized events contributed to the rapid expansion of the "Big Four" in the first post-war decade. The high level of development of the British consultancy market is confirmed by the fact that in March 1959 the European Productivity Agency organized a trip of consultants from ten other European countries to London. Its purpose was to study the work methods and the range of services offered by the leading British consultancies [11, pp. 72-73]. This context obviously left little or no room for the penetration of U.S. service providers in Britain.

In France, consultancies also developed during the first half of the century, even earlier than in Britain. Most of them were of Taylorist origin and had been established by Americans, including Harrington Emerson and Wallace

⁴In addition, Bedaux himself became a major liability for the consultancy because of his extravangant lifestyle, his relations with the Duke of Windsor, and his alleged sympathy for the Nazis.

Clark. In 1927, Bedaux opened an office in France and ten years later had installed his system in almost 150 firms. Since the late 1920s however, all of the new service providers were of French origin. In some cases their founders had initially worked with U.S. consultancies. Almost all of the French consultants had graduated from the leading engineering school Ecole Polytechnique. The establishment of new consultancies continued during the following decades, including André Vidal (1942) and Yves Bossard (1956) [28, 15].

Unlike their British counterparts, the vast majority of these service providers were firmly anchored in the scientific management tradition, a fact which is reflected in the name of the professional association established at the end of the 1940s: Association Française des Conseils en Organisation Scientifique (AFCOS). During this period, only one American consultancy experienced some success in France: K. B. White. An MIT graduate, White had already worked in French industry with Wallace Clark during the inter-war years. In 1947, the aluminium producer Pechiney, one of Clark's clients in the 1930s, employed him for a major re-organisation. White redesigned the company's organizational structure and then established work simplification procedures until 1952 with the help of André Pons, a French consulting engineer trained in the United States [5, pp. 410-442].

While U.S. consultancies remained unimportant in France, American management methods found considerable interest among French consultants. A group who visited the United States in 1950 identified the extensive market research undertaken by American firms and their human relations approach as some of the major differences with their own country [31]. The CEGOS, which focused mainly on human resources, emerged as one of the leading French service providers in the post-war period. Its origins go back to the Commission Générale de l'Organisation Scientifique du Travail, established in 1926 by big business with government support to promote rationalization of work practices. In 1948, it changed its statutes to become a consultancy. During the 1950s, other important French service providers were founded, including the Société des Mathématiques Appliquées (SMA). The SMA, later renamed Sema Group, was inspired by the operations research developed in the United States during the war, benefited from the mathematical training of French engineers, and subsequently devoted most of its activities to information technology [3, pp. 120-126; 15, pp. 48-54]

At the end of the 1950s, the interest of French firms in scientific management apparently faded. This change in emphasis away from the shopfloor towards higher levels of management is highlighted by the renaming of the consultancies' trade association AFCOS to Association Française des Conseillers en Direction (AFCOD) in the early 1960s. Some of the Taylorist firms, such as Bossard, managed to reorient their activities and remained among the largest service providers. Others disappeared or were absorbed by more successful competitors. Overall, the French consultancy market was quite well developed and diversified at the beginning of the 1960s, when the major U.S. consultancies tried to establish a foothold in Europe.

The evolution of the German consultancy market after 1945 presented a completely different picture. Unlike Britain and France, American consultants and consultancies had played hardly any role in Germany before the Second World War. Bedaux established an office in Berlin, but by 1937 only 25 firms had installed his system. Since the end of the 19th century, domestic consulting engineers and consulting organizers had offered their services. Both reached a certain importance and formed trade associations in 1903 and 1926 respectively [35]. The selective appropriation of U.S. management methods however, occurred largely through semi-official institutions, such as the National Efficiency Board RKW (Reichskuratorium für Wirtschaftlichkeit). Established in 1921 following an initiative from leading industrialists, the research community, and the Ministry of the Economy, it played a major role in the promotion of rationalization during the inter-war period [4, 14, 30].

In 1950, the RKW was re-established under the name Rationalisierungs-Kuratorium der Deutschen Wirtschaft and now also included trade union representatives. It became the German productivity center and as such coordinated the missions to the United States. By the end of the decade, the RKW started a "diagnostic" consultancy service for small and medium-sized firms, which remains one of its major activities today [4, pp. 29-47]. Compared to the RKW and a number of other institutions, consultants apparently played only a minor role in the diffusion of management know-how in Germany.

In 1954, 25 individuals, most of whom had links with the rationalization movement of the inter-war years, established the Union of German Business Consultants BDU (Bund Deutscher Unternehmensberater). Initially, the BDU saw itself as an exclusive club, consisting mainly of individual consultants rather than firms.⁵ But the small number and the composition of the BDU membership also reflected the state of the German consultancy market [35]. The only major service provider which emerged during this period was the firm established by the engineer Gerhard Kienbaum in Gummersbach in 1945. Fifteen years later, he employed almost 100 consultants and had opened additional offices in Düsseldorf, Hamburg, Frankfurt, Munich, and Vienna. The firm's initial focus was technical services, but it also expanded into general management and executive search. Today, Kienbaum is still among the ten largest consultancies in Germany.

Overall, the significant differences in the evolution of consultancy activities in the three countries, which had already developed during the interwar period, persisted and even increased after 1945. In Britain, consultancies continued to focus on the shopfloor, but increasingly incorporated considerations for industrial relations and human resources into their work and therefore raised less controversy. In France, the engineering profession continued to drive developments, but gradually shifted its attention from scientific management to

⁵The BDU modified its name to Federal Association (Bundesverband) only in 1974, indicating that it had changed its priorities and now claimed to represent the German consultancy industry.

operations research, human relations, and market research, leading to a wide variety in the services provided. Contrasting with these two cases, in Germany semi-official institutions, now including labor, remained the predominant channel for the diffusion of management know-how, leaving only limited room for the development of consultancy activities.

The American Challenge

In 1960, the consultancy associations from Britain, France, Germany, the Netherlands, Sweden, and Switzerland established a European organization, the Fédération des Associations de Conseils en Organisation (FEACO). While this decision probably reflected the growing importance of the European dimension, it also came at a time when a number of major U.S. consultancies expanded to Europe. The three most important ones were Booz-Allen & Hamilton, Arthur D. Little, and McKinsey [25, 27].

The origins of the first go back to a research firm established by Edwin Booz in 1914. In the early 1960s, it employed over 800 professionals and was the largest member of the U.S.-based Association of Consulting Management Engineers (ACME). It also had the largest European presence of the American service providers with more than 70 consultants; however, most of them were U.S. citizens, and their work mainly concerned the installation of manufacturing control systems. Arthur D. Little was founded in 1886 as an engineering research company. In the post-WW II period, it developed consultancy activities and by 1962 had 30 professionals in Europe, who conducted marketing studies, especially in the chemical industry. The majority of its clients were European subsidiaries of U.S. multinationals.

James O. McKinsey established his company in 1926. At the beginning of the 1960s, it was the second largest ACME member with about 200 consultants worldwide. Following a study for Shell, McKinsey had opened an office in London at the end of the 1950s, which employed 15 consultants by 1962. With its top level organizational studies, McKinsey proved to have the most important and long-lasting influence on the development of the consultancy market in Europe. By the early 1970s it had gained a strong position in many European countries, mainly through the introduction of the multidivisional structure, the so-called M-form, which had been developed during the 1920s in the United States. But as before, significant differences can be observed regarding the extent and the exact role of consultancy activities in Britain, France, and Germany.

During the immediate post-war period, British firms had undergone a significant expansion and diversification, leading to a need for reorganization. Many of these firms used consultancies for the review of their organizational structures. Derek Channon found that at least 32 out of the largest 100 companies called in consultants during the 1960s to help with an overhaul of their organization. In 22 of these cases the service provider was McKinsey, whose clients included ICI, Dunlop, and Vickers [7]. In 1968, the Bank of England also

retained the U.S. firm to undertake a major study of its organization and work methods. This decision caused considerable uproar among the British consultancies and was even brought before Parliament [39, pp. 73-76].

Thus, British firms continued to appeal to consultancies for help with their management problems. On the one hand, this probably reflected their previous, rather positive experience with outside advice. On the other hand, since many of them had grown through acquisitions, they possibly preferred to have an outsider act as arbiter between the different interests. However, why such a considerable number of firms employed the U.S. consultancy McKinsey needs to be clarified. It might be that the "Big Four" domestic service providers were associated too closely with shopfloor and human resource studies. This hypothesis receives some confirmation from the fact that two of the largest British consultancies, Production Engineering and Personnel Administration, changed their name to P-E Consulting Group and PA Management Consultants respectively in the mid-1960s [39, p. 42]. In addition, the large number of U.S. multinationals in Britain probably facilitated the penetration of American consultancies, since they provided both an example and a starting base.

On the whole, it is questionable whether the interventions of McKinsey and other consultancies proved as useful as the client companies had hoped. In the few better known cases, such as Plessey, Blue Circle, or Midland Bank, the implementation of McKinsey's recommendations took a number of years, was often completed only partially, and was sometimes even reversed because of rather disappointing results [7, pp. 136-137; 33, pp. 161-168; 16, pp. 282-288]. Bruce Kogut and David Parkinson have tried to explain these difficulties by what they call the "on paper" adoption of the M-form, i.e. the fact that many companies left the underlying, independent holding structures intact [18]. Only further research regarding the client-consultancy interaction can verify this assertion or unveil other reasons for the apparently rather frequent cases of implementation failure.

From its "bridgehead" in Britain, McKinsey expanded to the European continent where it opened offices in Düsseldorf in 1964 and in Paris in 1965. In France, the U.S. consultancy also introduced the multidivisional structure in a number of firms. A study conducted by management researchers in the early 1970s concluded that this "American consulting success clearly shows up an absence of French-grown managerial skills in certain areas" [10, p. 247]. From a historical and comparative perspective, this seems an unjustified exaggeration. McKinsey and the other U.S. consultancies which arrived in France in the 1960s and the early 1970s had only a limited success.

Many of their initial clients had either used American consultants before, for example the above mentioned aluminium producer Pechiney, or were active in the United States, such as Lafarge [5; 32]. Similar to the British case but for other reasons, the decentralization efforts in French companies were rather unsuccessful. The multidivisional structure conflicted with the all encompassing role of the powerful Président-Directeur Général (PDG) who, based on a law of 1940, combined the functions of Chairman and CEO. As a consequence, only a

few American consultancies actually managed to establish a position in corporate strategy, working directly with the PDG concerning questions of long-term orientation. But while considered "noble," this segment constitutes only a rather small proportion of the overall market, which continued to be dominated by the diverse group of French service providers.

In Germany on the other hand, McKinsey "was involved in, and largely shaped, over a dozen divisionalizations of major German firms" during the 1960s and early 1970s [10, p. 112]. This has to be considered a surprising development, given the previous reluctance of German companies to use consultancy services. As in Britain and France, the results of these interventions seem to have been mixed, but the successful establishment of McKinsey signaled, and possibly even caused, an important breakthrough in the German consultancy market. A number of other U.S. consultancies also opened offices in Germany during the same period, including A.T. Kearney, Arthur D. Little, and the Boston Consulting Group. In addition, many of today's major German service providers, such as Roland Berger and Mummert, were founded in the 1960s.

The exact reasons for the increasing use of consultants in German companies require further research. Like in the British case, U.S. multinationals could have played a pioneering role. Three among the twelve companies mentioned above were indeed subsidiaries of foreign firms. But the German companies themselves underwent considerable changes in the 1960s and 1970s which might have prompted a modification in their attitude towards consultants. First, due to the rapid, mainly organic growth in the first post-war decades, most firms had reached a size which became more and more unmanageable. Therefore, as one executive put it, divisionalization could lead to "the shake-up and break-up" of existing bureaucracies, a task at which consultants were assumed to be highly effective [10, p. 121]. Secondly, the old, rather autocratic "captains of industry" were gradually replaced by a new generation of top managers who had experienced a significant American influence during their formative years since 1945 and thus might have been more open toward U.S. consultancies [1].

A majority of German firms remained, however, suspicious or even hostile towards consultants until the mid-1970s. Interviews conducted with German companies in 1975 by a British management researcher on behalf of several consultancies indicated that most of them saw the employment of a management consultant "as an expression of their own failure." Many of those interviewed complained about the fact that consultants usually left the clients alone, once they had made their "nice recommendations." American consultancies especially were characterized as being much too theoretical [34]. But during the second half of the same decade, the German consultancy market experienced another period of rapid growth [17]. The exact reasons for this second "surge" of consultancy activities need to be clarified. In addition to the above mentioned elements, the extension of worker codetermination at the supervisory board level in the 1970s might have required more justification in case of a significant restructuring, and thus encouraged the use of outside consultancies.

Overall, during the 1960s and 1970s, the differences in the use of consultancies in Britain, France and Germany persisted. While U.S. service providers established a significant presence in all three countries, their success and their influence were far from uniform. Their contribution to the diffusion of American management know-how seems rather limited, mainly because they failed to adapt the U.S. model to the existing corporate structures in Europe. The major change in this period was certainly the fact that German firms started using consultants on a regular basis.

More Recent Developments and Outlook

During the 1980s, the rapid penetration of the large Anglo-American accountancies was probably the most important change in the European consultancy market [17].⁶ Most of them had been present in continental Europe since the 1950s, initially as auditors for the subsidiaries of U.S. multinationals. Based on their audit clients, they developed consultancy activities on a significant scale since the late 1970s, mainly in information systems which were one of the fastest growing segments at the time. After being formally separated from the audit business only in 1988, Andersen Consulting is today the largest consultancy worldwide, with a global revenue of almost \$3.5 billion and over 27,000 consultants in 1994.

Once again, developments differed considerably in the three countries. The consultancy arms of the large accountancy firms made significant inroads in Britain and France where they forced some of the major domestic consultancies to redirect their activities towards other types of services. In Germany on the other hand, only two of the "Big Six" are currently placed among the ten largest consultancies: Andersen Consulting and KPMG.⁷ One of the main reasons for this difference appears to be the fact that, until very recently, many German firms preferred to maintain their IT and software development in-house, thus providing only a limited scope for the expansion of external service providers [9]. In addition, the "Big Six" were rather slow in establishing an audit presence in Germany, because the existing accountancies initially proved quite reluctant to become fully integrated with their world-wide networks [24].

Today, the U.S. consultancies which established a presence in Europe during the 1960s and 1970s seem to have adapted to the systemic context in each country. Almost all of their consultants are of national origin, recruited according to the "logic" of the respective education systems. The results of a recent comparative study suggest that the type of client-consultancy interaction usually corresponds to the predominant form of corporate governance and

⁶After two mergers at the end of the 1980s, there are today six of them left: KPMG, Ernst & Young, Arthur Andersen, Coopers & Lybrand, Deloitte & Touche, and Price Waterhouse.

⁷The latter only achieved this position because of its German audit partner which already had established a consultancy arm in 1969.

management style [36]. German companies characterized the need to involve middle managers and workers in organizational changes as one of the foremost motives to employ consultancies. In Germany, consultants therefore seem to act predominantly as change facilitators or trainers, whereas in France they operate mainly as direct advisors to the company's powerful executive, collecting information and providing justification for "unpopular" measures.

Considerable differences in the consultancy markets in Britain, France, and Germany thus persist, despite the apparently increasing predominance of U.S. service providers in each of these countries. Even consultancies with the same name tend to carry out different activities, depending largely on the systemic context in which they operate. Only an increasing convergence of national management systems, including the social, legal, and institutional framework, could therefore lead to a further narrowing of the differences between consultancy use in each country. As most of the management literature shows however, this seems unlikely to happen in the near future.

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