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SECTOR COMPETITIVENESS FRAMEWORKS

MANAGEMENT CONSULTING PART 2 — FRAMEWORK FOR ACTION



**Industry
Sector**
*Service Industries
and Capital Projects*

**Secteur
de l'industrie**
*Secteur des services
et grands projets*

Canada

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MANAGEMENT CONSULTING

PART 2 — FRAMEWORK FOR ACTION

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CAPITAL PROJECTS BRANCH**

This *Framework for Action* is the second of two companion documents on Canadian management consulting in the **Sector Competitiveness Frameworks** series, which is being produced by Industry Canada in collaboration with Canada's key stakeholders in the industry. It is based on discussions with major industry stakeholders, following study and review of *Part 1 — Overview and Prospects*.

The **Sector Competitiveness Frameworks** series focusses on opportunities, both domestic and international, as well as on challenges facing each sector. The objective is to seek ways in which government and private industry together can strengthen Canada's competitiveness and, in doing so, generate jobs and growth.

To obtain additional information about the **Sector Competitiveness Frameworks** series, please phone us at 1-800-390-2555.

Electronic copies of this document are available on the Internet at the following address:

<http://strategis.ic.gc.ca/scf>

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FOREWORD

The new Canadian marketplace is expanding from national to global horizons and its economic base is shifting increasingly from resources to knowledge. These trends are causing Canadian industries to readjust their business approaches, and government must respond with new tools to help them adapt and innovate. Industry Canada is moving forward with strategic information products and services in support of this industry reorientation. The goal is to aid the private sector in what it is best qualified to do — create jobs and growth.

Sector Competitiveness Frameworks are a series of studies published by Industry Canada to provide more focussed, timely and relevant expertise about businesses and industries. They identify sectors or subsectors having potential for increased exports and other opportunities leading to jobs and growth. They cover 30 of Canada's key manufacturing and service sectors.

While they deal with "nuts and bolts" issues affecting individual sectors, the Sector Competitiveness Frameworks also provide comprehensive analyses of policy issues cutting across all sectors. These issues include investment and financing, trade and export strategies, technological innovation and adaption, human resources, the environment and sustainable development. A thorough understanding of how to capitalize on these issues is essential for a dynamic, job-creating economy.

Both government and the private sector must develop and perfect the ability to address competitive challenges and respond to opportunities. The Sector Competitiveness Frameworks illustrate how government and industry can commit to mutually beneficial goals and actions.

The Sector Competitiveness Frameworks are being published sequentially in two parts. An initial *Overview and Prospects* document profiles each sector in turn, examining trends and prospects. The follow-up *Framework for Action* draws upon consultations and input arising from industry-government collaboration, and identifies immediate to medium-term steps that both can take to improve sectoral competitiveness.

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1 INTRODUCTION

1.1 Purpose of Framework for Action and Link to Overview and Prospects

Part 2 — Framework for Action for management consulting in the Sector Competitiveness Frameworks series draws upon consultations and input arising from industry-government collaboration, and identifies immediate to medium-term steps that both can take to improve sectoral competitiveness. It follows *Part 1 — Overview and Prospects*, which profiled trends emerging in the management consulting sector. The main issues affecting the competitiveness of the industry identified in the initial document are addressed through industry-government actions proposed in this *Framework for Action*.

1.2 Outline of Collaborative Process

The main focus of collaboration/consultation was between Industry Canada and the Institute of Certified Management Consultants of Canada (ICMCC), its member organizations and management consulting firms across Canada. Consultations were also held with other federal and provincial departments involved with the management consulting industry. Section 2.2 outlines the collaborative process in detail.

1.3 Outline of Document

This document identifies the main stakeholders and their interests, describes the collaborative process that took place, provides a long-term vision for the industry, identifies the main issues highlighted in the *Overview and Prospects* document that impact upon the industry, and proposes actions to address the issues to be taken by stakeholders, individually or collaboratively. Finally, the document concludes with a statement on the expected benefits of resolving these issues and the consequent impact on the competitiveness of the industry.

2 THE STAKEHOLDERS AND THE COLLABORATIVE PROCESS

2.1 Who Are the Stakeholders and What Are Their Interests?

Industry

The major thrust of consultations occurring between Industry Canada and the management consulting industry is with the ICMCC and its affiliated provincial/regional institutes across Canada. The Institute, founded in 1970, is the national voice of management consultants. Corporate membership of the ICMCC stands at 15 firms, including many of the larger national companies, while on the professional side the provincial/regional institutes have approximately 3 500 individual members from all segments of the management consulting community. The internationally utilized designation of Certified Management Consultant (CMC) is granted by the provincial institutes upon completion of the course requirements.

Government Departments and Agencies

Industry Canada maintains a close working relationship with the management consulting industry through regular contact with its industry association, the ICMCC, and with individual firms. Industry Canada's role is one of a catalyst, facilitator and information provider in order to foster the competitiveness of the industry. In addition to this Sector Competitiveness Frameworks process, the ICMCC and Industry Canada have undertaken a number of joint initiatives, including a study of the use of technology in the management consulting industry and the development of an international business strategy; these are available on Industry Canada's web site, *Strategis*, at: <http://strategis.ic.gc.ca>

Other Stakeholders

These stakeholders work with the management consulting community in export and general business development. The **Department of Foreign Affairs and International Trade** (DFAIT) operates and maintains the Trade Commissioner Service, whose primary responsibility is to assist Canadian companies starting or expanding export sales in international markets. Industry Canada and DFAIT have established International Trade Centres across Canada to assist Canadian exporters. The **Export Development Corporation** (EDC), a financial services Crown corporation dedicated to helping Canadian businesses succeed in the global marketplace, facilitates export trade and foreign investment by providing risk management services, including insurance, financing and guarantees, to Canadian companies and their global customers.

The **Canadian International Development Agency** (CIDA) has responded to calls from the developing world to expand linkages between their nascent private sectors and ours, by encouraging greater participation of the Canadian private sector in government-sponsored development efforts. The **Canadian Commercial Corporation** (CCC) is a federal Crown corporation, which acts as a prime contractor and guarantor for sales by Canadian exporters to foreign governments and international organizations.

The remaining stakeholders include the **Business, Professional and Educational Services National Sector Team** (NST), which assists the federal government to focus and prioritize its efforts to support exports, **provincial industry departments, Crown corporations, public utilities and municipal governments.**

The public sector is a major purchaser of consulting services. Decreases in personnel at all levels of government have reduced its capability to conduct consulting work in-house, and this has opened up a larger market for management consulting firms. For governments as for all large organizations, the rapid pace of change can be expected to continue, as illustrated by the growing recognition that consulting services are important to increasing our sustainable development capacities. The management consulting industry can assist with the required adjustments.

Clients of the management consulting industry, both private and public, are stakeholders in the industry. Every organization wants to receive the best service possible; therefore, the client benefits, through the quality of the services it receives, from having a strong, competitive management consulting community.

2.2 The Collaborative Process

Part 1 — Overview and Prospects on the management consulting industry was developed in cooperation with the ICMCC and a number of individual management consulting companies. The completed *Part 1* was distributed to most of the membership of the ICMCC and the provincial/regional institutes, with a questionnaire seeking comments on the document and on issues facing the industry. In cooperation with the Institute, a draft of this *Part 2 — Framework for Action* has been circulated within the industry. Consultations were held to ensure the document reflected industry views. Other stakeholders, particularly within government, were also consulted.

3 AGENDA FOR ACTION

3.1 Shared Long-term Objectives

Industry Canada's objective is to foster the competitiveness of the management consulting industry through the client-focussed delivery of innovative products, services and policies. Similarly, the mission of the ICMCC is to support the provincial institutes to promote the development of professional management consulting, advance the excellence of practice of professional management consulting, achieve recognition of the value-added by professional management consulting, and distinguish the CMC designation as the standard for the profession. As the national voice of management consultants with representation from both firms and individual consultants, the ICMCC is an important vehicle for strengthening the management consulting industry. The actions proposed for the ICMCC demonstrate its vision and determination to develop the full potential of Canada's management consulting community.

3.2 Issues and Priorities

Consultations with industry on the *Part 1 — Overview and Prospects* phase of the Sector Competitiveness Framework on management consulting have confirmed that certain key issues must be addressed by the industry, its association and its partners including government. The competitiveness issues on which all stakeholders must work together are summarized below and include associated actions to address them. As much as possible, the management consulting community at large will be encouraged to participate in these actions.

3.3 Summary of Issues, Priorities and Proposed Measures

HUMAN RESOURCES ISSUES AND RELATED ACTIONS

Issue 1: Many Canadian management consultants are not well enough informed about the significant changes taking place in internationally based management consulting practices.

The Canadian management consulting community is being challenged to develop new services as a result of rising client expectations, changes in information technology and growing competition. Canadian firms may not necessarily lead in the development of these new approaches but, through research and study of the current advances, they can refine and customize them to specific client needs. New, innovative services must be developed, however, while the standards of service are maintained or enhanced and while competitive fee structures are retained. Canada's strength in management consulting is its small and medium-sized firms with their specialized functional and sectoral expertise, and it is a particular challenge for these knowledge-based companies to focus significant human resources on new service development.

This is perhaps the single most important issue facing the management consulting industry, in particular, the sole practitioners and the small firms. The ability to offer professional, innovative, state-of-the-art services at competitive rates is a prerequisite for success domestically and globally. The issues that follow are important and are generally linked to this one, but the others cannot be successfully addressed in the medium term if the issues of the skills and business processes of practitioners are not dealt with fully.

Actions

The ICMCC professional development program will include workshops on new trends in management consulting practices such as result-based practice, cross-discipline practice, virtual organizations, boutique operations, brand marketing, information technology applications and risk management.

In keeping with its interest in life-long learning, the ICMCC's web site (<http://www.cmc-consult.org/>) is updated regularly with references to new studies published on trends in management consulting practices and upcoming professional development activities. Industry Canada will link to the Institute's site from its site, *Strategis* (<http://strategis.ic.gc.ca>), so as to assist in exposing as many of the industry's firms as possible to this valuable information. The ICMCC will reciprocally link to *Strategis*.

Industry Canada's *Strategis* web site offers a vast array of information and guidance that can assist the management consulting community with this issue. Of particular interest are those *Strategis* offerings targeted to service industries; most notable perhaps is Steps to Competitiveness (<http://strategis.ic.gc.ca/steps>). Steps provides management information and self-assessment tools dealing with nine major topics, including marketing and new service development, for small and medium-sized service companies. Industry Canada will promote Steps and *Strategis* with the management consulting community.

Progress Measurement

The levels of interest in the ICMCC's professional development program and the reference section on its web site will be monitored. The reaction of the management consulting community to Industry Canada's web site, *Strategis*, and to its management improvement tool, Steps to Competitiveness, will also be measured.

TRADE ISSUES AND RELATED ACTIONS

Issue 1: More sole practitioners and small management consulting firms must become export ready.

Canada is a net exporter of consulting services. As well, the contribution of exports to revenue rises as the size of the firm increases. With the expertise and knowledge resident in the small and medium-sized firms, there is significant potential to take advantage of the growing global market and to bolster Canada's exports of management consulting services. The smaller consultancies usually cannot compete with the multinational firms for large projects but, with their specialized functional and sectoral knowledge, they can work with larger firms on major projects or take on niche assignments and do very well. As competition increases domestically, Canadian consultancies must become globally competitive in order to retain their domestic clients.

Actions

Under the Business, Professional and Educational Services National Sector Team (NST), the Canadian International Business Strategy (CIBS) that was developed for management consulting is being improved and implemented. This export-oriented strategy focusses on export readiness, the international marketing of Canadian management consulting services and alliance building. The NST now is concentrating on specific export markets, and management consulting is a key player.

Several products dealing with exporting are available from the federal government; Industry Canada's Take a World View (<http://strategis.ic.gc.ca/twv>) assists firms to become export ready. DFAIT's home page (<http://www.dfait-maeci.gc.ca>) provides links to a number of its export-related sites. InfoExport provides valuable information about exporting. DFAIT's Program for Export Market Development (PEMD) can financially support companies with their international efforts, while IFInet provides information about projects financially supported by international financial institutions (IFI). Industry Canada and DFAIT will promote these valuable tools with the management consulting industry.

The ICMCC has and will launch a number of initiatives to assist the management consulting community develop its international focus. The Special Interest Group for International Business was established to encourage cooperation and collaborative activities among participants in international trade. The ICMCC's professional development programming for management consultants will provide a focus on international market development and service delivery. This will include training on building alliances with the prime contractors for international capital projects. The **Forum for International Trade Training (FITT)**, with support from Industry Canada and DFAIT, has developed a special course for the service industries, and the Institute will investigate the course with a view to its use with management consultants.

Progress Measurement

The implementation of the CIBS for management consulting will be monitored. The engagement of management consulting in the NST's specific country initiatives is to be analyzed periodically. The interest of management consultants in the InfoExport, Take A World View, PEMD and IFInet will be reviewed. Participation levels in the Special Interest Group for International Business will be monitored. The success of the ICMCC's professional development programming that deals with international markets will be judged.

Issue 2: The marketing of Canadian management consulting services abroad needs to be enhanced.

Management consulting is at the forefront of Canada's knowledge-based service industries, and the global demand for such business services is growing. With Canada's functional and sectoral knowledge in demand around the world, enhanced international marketing of our management consulting services can develop global business opportunities and help to diminish the traditional reliance on the U.S. market.

Actions

Training has been undertaken at a number of Canadian Posts to ensure that Trade Commissioners can assist service exporters. Industry Canada and DFAIT will continue to support the Trade Commissioners with timely industry intelligence. In addition, Industry Canada, DFAIT and the ICMCC will cooperate to produce information on the capabilities of the Canadian management consulting services industry, for distribution to Canada's foreign posts. International markets can be very competitive and it is necessary to differentiate Canadian management consulting services from those of our competitors in order to highlight our competitive edge. Consultancies will be encouraged to register in Industry Canada's Canadian Company Capabilities (CCC) database, which helps companies to market their services world-wide, and in DFAIT's World Information Network for Exports (WIN Exports) database, which permits trade commissioners to respond to inquiries about Canadian suppliers. These databases are respectively available on Industry Canada's *Strategis* and the DFAIT web sites.

Since trade commissioners in foreign posts can benefit from informed, immediate support in promoting the management consulting industry, the ICMCC, DFAIT and Industry Canada will examine the feasibility of a secondment program that would place experienced management consultants in a selected number of foreign posts for two-year terms. The countries initially selected would be some of the largest developing economies, which are the focus of international financial institutions (IFIs) and in which Canada has significant business opportunities. The secondees would become involved in formulating and channelling specific opportunities to Canadian management consultants. The secondees could also build relationships with local consulting firms and contractors of large projects. Such relationships can provide valuable intelligence about required service offerings in international markets. Through CIDA, a similar secondment program has already been established with the World Bank.

Progress Measurement

The level of marketing support provided to the exporting efforts of the management consulting community will be scrutinized. The volume of registrations of management consultants in the CCC and in WIN Exports will be followed.

Issue 3: More small and medium-sized management consulting firms can benefit from forming strategic alliances and partnerships in pursuit of business, particularly for projects in the international arena.

In order to sustain successfully a presence in the international market, small and medium-sized consulting firms often need to form a virtual, connected organization from a base of professionals who can cover a wide range of multidimensional requirements, with access to a collective knowledge base and the financial capabilities to market and cover risks associated with international projects. Most Canadian consulting firms, typically being small, need to be able to build such cooperative structures in order to

take on international business. These alliances may involve both Canadian and non-Canadian companies. Alliances also allow the smaller companies to better meet the challenges noted above under Human Resources Issues. For major international projects, alliances may also need to be developed with firms and professionals in other fields such as consulting engineering, education and health services.

Actions

The ICMCC and Industry Canada will work in partnership to make alliances for exporting easier to establish. Industry Canada's Steps to Competitiveness site contains a module that deals exclusively with promoting the use of effective partnerships and alliances. Industry Canada recently held a forum dealing with alliances; the conclusions and best practices information from the forum will be made available to the Institute for its members. In addition, Industry Canada will work to develop the partnerships of the management consulting community and the ICMCC with other industries and industry groups dealing with both hard and soft infrastructure.

Progress Measurement

The interest among management consultants in the information provided about partnerships and alliances will be monitored. The links established between the management consulting community and other industries will demonstrate the advancement in this area.

Issue 4: There is a lack of facilities for sole practitioners and small firms to identify and link up with other international consultants for collaborative activities.

Actions

Through its international affiliations, the ICMCC will facilitate international collaboration among management consultants. The ICMCC is a founding member of the **International Council of Management Consulting Institutes** (ICMCI), which has representation from over 25 countries. Through this membership, the Institute encourages country-to-country linkages. This will build the electronic infrastructure to facilitate formal and informal connections between Canadian members and members of institutes in other countries. Joint projects will be facilitated, particularly where Canadian consultants have a competitive fee structure. These developments will assist the export of management consulting services that was discussed above.

Progress Measurement

The level of association between Canadian consultants and consultants in other countries will measure the progress made on this issue.

TECHNOLOGY ISSUES AND RELATED ACTIONS

Issue 1: Canadian management consulting companies must be technologically advanced and use compatible, appropriate technology.

For the consulting community, technology refers to the tools of the trade such as frameworks and methodologies as well as to communications/computer technology including the Internet. The former category has been considered under the Human Resources Issues above and is critical for the industry. The latter category is also very important, as consulting in this area accounts for perhaps 40 percent of industry revenues.

Technology is an essential tool for most knowledge-based consultants. In dealings with clients, the consultant must, at a minimum, be perceived to be on the same technological level as the competition. The communications and computer tools utilized are important factors in boosting the productivity of the consultant. Additionally, the heightened client-consultant interaction that information technology provides can facilitate the maintenance of high service standards within a competitive fee structure. Technology can lessen the time and dollar costs of service development.

The technology issue may be particularly acute for medium-sized firms. The small, particularly single, consultancies often are highly specialized and can work on niche projects via the Internet from their homes. Additionally, they can partner among themselves and act together as virtual firms. At the other end of the spectrum, the larger companies can absorb the substantial costs for new hardware and database development. The mid-sized firms, trying to stay close to the industry leaders, are disadvantaged by their unavoidable overhead costs for information technology.

Actions

The ICMCC's professional development program will deal with the subject of information technology applications, including the Internet. Industry Canada's *Strategis* web site offers a wealth of information dealing with business issues. In addition, Steps to Competitiveness has a complete module concerning the effective use of technology by service firms. As mentioned above, these information products will be promoted within the management consulting community.

Progress Measurement

The management consulting community's uptake of the information technology segment of the Institute's professional development program will demonstrate its level of awareness. Reaction to the technology module of Steps to Competitiveness will help to measure progress.

OTHER ISSUES AND RELATED ACTIONS

Issue 1: There is rapid growth in the number of consultants offering management advice and, without widely accepted standards of conduct, the industry is bound to be negatively affected, both domestically and internationally.

There are no entrance requirements for practising in this industry that are equivalent to those in other professions. Anybody can call himself/herself a consultant and start supplying management advice. Many of these advisors do not have training in management consultancy processes and do not subscribe to a professional code of ethics. Currently, perhaps 20 percent of management consultants are members of the ICMCC and are subject to its code of ethics.

Actions

The ICMCC, as the Canadian body for the management consulting industry, has decided to open membership to all practising management consultants and consulting firms who commit to its Professional Code of Ethics. This move is intended to reach out to all management consultants and build a strong national institution with a wider base and a focus on excellence in management consulting services. Membership, at a minimum, requires acceptance of the Professional Code of Ethics, which is internationally recognized. The ICMCC offers a certification program for those who wish to acquire the Certified Management Consultant (CMC) designation, also recognized internationally. In addition, the Institute is planning to provide an extensive professional development program for management consultants. These efforts will assist the consulting community to meet the demands of the market and supply a higher level of assurance to the industry's clientele.

Progress Measurement

The growth in ICMCC membership will demonstrate the advancement made on this issue.

Issue 2: Large, new providers of consulting services have added significant competitive pressures to the domestic market for consulting services.

With the blurring of service industries' boundaries, including those of management consulting, large, non-traditional suppliers of consulting services, for example, from the finance and computer fields, are adding to the supply of consulting services, as they offer their clients a wider range of services. In addition, there is a growth in advisory services offered by public organizations such as colleges and universities, provincial and federal government agencies, Crown corporations and other such agencies. The competition provided by this latter group of service providers, in particular, can affect management consulting firms of all sizes; individuals and small groups from these public organizations are particularly impacting on the markets of the smaller consultancies.

Action

In the face of this growing competition, the industry must differentiate itself and provide professional, value-added services at a high standard and at competitive fees. In addition, there may be scope for partnerships with these newer providers of consulting services. The aforementioned professional development efforts of the ICMCC and the management/information tools available from Industry Canada can assist the management consulting community to address the competition issue.

Progress Measurement

The interest of the management consulting community in the ICMCC's professional development program and in Industry Canada's management/information tools will assist in determining progress.

Issue 3: The ICMCC needs to build its capacity to meet the challenges posed by the growth in the industry.

To fulfil the economic promise of Canadian management consulting and its significant benefits for Canada, the Institute must grow and expand. The Canadian management consulting industry would benefit from improved coordination through institutional activities and stronger institutional development programs over the next three to five years. Internationally, the Institute can be a world leader for the profession, as witnessed by its discussions with the People's Republic of China about building that country's consulting services industry. However, the ICMCC lacks the financial resources to sustain its industry leadership status, as exemplified by its professional development program noted above.

Actions

The ICMCC is going through a major restructuring program that is focussed on building a strong institution for supporting the growing base of the management consulting industry. It intends to build tighter linkages with all stakeholders in order to have the widest coverage for its programs for achieving excellence in management consulting in Canada.

The ICMCC is reaching out to other relevant organizations. Its Memorandum of Understanding with the Canadian Institute of Chartered Accountants recognizes the strong relationship between business advisory services and management consulting. The acquisition of the CMC designation by chartered accountants will be facilitated under this agreement, as the ICMCC broadens its reach.

The federal government will continue its support for the ICMCC. As much as possible, DFAIT's Program for Export Market Development (PEMD) will continue to be available to the ICMCC and its members. Industry Canada will maintain its support for the management consulting service industry through the Business Professional, and Educational Services National Sector Team. The actions detailed in this *Framework for Action* and the CIBS for the management consulting industry complement and support the industry's initiatives.

MANAGEMENT CONSULTING

Statistics Canada will improve its collection of service sector data and continue its international work on developing national information, including that for management consulting, that can be collected and reported internationally. With the implementation of the North American Industrial Classification System in 1997, more timely data specific to the management consulting industry are anticipated, which will help demonstrate the size and importance of the management consulting industry and track its performance. At the subindustry level, better data are needed on the specializations and performance of different types and sizes of management consulting firms.

Progress Measurement

The growth, size and financial capacity of the ICMCC in the medium term will demonstrate the level of progress achieved.

4 EFFECT OF RESOLVING THE ISSUES AND INCREASING OR MAINTAINING COMPETITIVENESS

The resolution of the issues discussed above will allow the Canadian management consulting industry to meet its challenges and to take advantage of its significant opportunities domestically and globally. The industry will present to the world, connected knowledge-based companies, large and small, that offer state-of-the-art services with high standards of performance and competitive fee structures. The world will be aware of the capabilities of Canadian management consultants; the companies will be export ready and connected to the world, by national and international alliances. The ICMCC will be a large, financially sound organization that serves the needs of the industry and assists the development of the management consulting profession around the world.

The participants involved in drawing up this *Framework for Action* believe these developments would represent significant accomplishments. The actions proposed must ultimately be judged, however, by their contribution to the achievement of an innovative and efficient industry that is successful in developing new markets at home and in improving its share of expanding foreign markets for management consulting services.

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**ANNEX A WEB SITE ADDRESSES (URLS) FOR
ORGANIZATIONS DISCUSSED IN THIS DOCUMENT**

Canadian Commercial Corporation: <http://www.ccc.ca/>

Canadian International Development Agency: <http://www.acdi-cida.gc.ca/>

Department of Foreign Affairs and International Trade: <http://www.dfait-maeci.gc.ca>

Export Development Corporation: <http://www.edc.ca/>

Forum for International Trade Training: <http://www.fitt.ca>

Industry Canada: <http://www.ic.gc.ca>

Institute of Certified Management Consultants of Canada: <http://www.cmc-consult.org/>

International Council of Management Consulting Institutes:

<http://www.mcninet.com/icmci/cmcHome.html>