

Entity Clarity Report

Professional Services & Consulting

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Q1 2026 Edition

SUMMARY

Consulting firms historically monetized three things: interpretation of complex information, execution at scale through human labor, and institutional permission to act.

AI systems now perform the first two functions at near-zero marginal cost. What remains is permission and accountability — neither of which scales through a traditional consulting pyramid.

This report applies the **Entity Clarity & Capability (ECC)** framework to 50 global consulting and professional services firms. What emerges is a sector caught in structural transition: the firms selling execution are already being repriced, while those retaining judgment and accountability show durable authority.

The consulting industry is not collapsing overnight. It is being decomposed function by function.

METHODOLOGY

This analysis applies the **Entity Clarity & Capability (ECC)** framework to 50 global Professional Services & Consulting firms, spanning strategy consulting, Big Four advisory, IT/management consulting, specialized boutiques, technology/digital consulting, and research/advisory.

ECC evaluates how legible, trustworthy, and structurally interpretable an entity is to modern AI systems across three weighted tiers:

- **Entity Comprehension & Trust:** Narrative coherence, authority signals, interpretability, and trust scaffolding
- **Structural Data Fidelity:** Schema quality, canonical clarity, internal lattice consistency, entity anchoring
- **Page-Level Hygiene:** Technical consistency, crawl efficiency, inference stability, and site-level cleanliness

Each company is classified by **AI Posture**:

- **Open** – Accessible and legible to AI systems
- **Defensive** – Partially open with controlled narrative exposure
- **Blocked** – Intentionally opaque or inaccessible

Scores reflect **strategic positioning**, not moral judgment or service quality.

FINDINGS

Distributions

Every blocked firm scores Low Capability — Prestige does not override illegibility.

Posture	Count	%	Capability	Count	%
Open	31	62%	High	15	30%
Defensive	8	16%	Medium	24	48%
Blocked	11	22%	Low	11	22%

Core Findings

1. Blocking AI is not a moat.

McKinsey (ECC 0), Kearney (ECC 0), Strategy& (ECC 0), PwC (ECC 0), Infosys (ECC 0), EPAM (ECC 0), Gartner (ECC 0), and Frost & Sullivan (ECC 0) have blocked AI access entirely. These firms attempt to preserve mystique and control access. In an AI-mediated world, this renders them invisible. Prestige without legibility decays faster than mid-tier openness.

2. The MBB triad is fractured.

The elite strategy firms show radically different postures: Bain is fully legible to AI systems.

Company	Posture	ECC	Capability
McKinsey & Company	Blocked	0	Low
Boston Consulting Group	Defensive	65	Medium
Bain & Company	Open	81	High

McKinsey is invisible. This is not a branding difference — it is a structural divergence in how these firms will be discovered, referenced, and recommended.

3. Execution is the fastest-decaying revenue.

IT/Management consulting shows the widest variance — and the clearest risk exposure. Firms most dependent on human execution (billable hours, offshore delivery, implementation) show the steepest ECI risk. AI systems collapse execution demand by reducing human labor requirements per outcome.

Company	ECC	Capability
Atos	90	High
Capgemini	83	High
Accenture	81	High
Cognizant	53	Low
Infosys	0	Low (Blocked)

4. Research/Advisory firms are bifurcated.

Gartner — the largest research firm by market cap (~\$40B) — is blocked (ECC 0). Forrester (91) and IDC (80) are fully legible. When AI systems synthesize market research, Gartner cannot be cited.

5. Boutiques outperform prestige firms.

Specialized firms with clear value propositions and open postures score higher than generalist prestige firms. Authority accrues to clarity, not brand.

LANDSCAPE

Consulting firms face a structural test that prestige cannot solve.

The industry historically monetized three functions: interpretation of complex information, execution at scale through human labor, and institutional permission to act. AI systems now perform the first two at near-zero marginal cost. What remains is permission and accountability — neither of which scales through a traditional consulting pyramid.

The ECI evaluates which firms retain entity authority in this new environment, and which are already being routed around by AI-mediated decision systems.

The core tension is existential: **When a consulting firm partners with a frontier AI provider, it gains short-term relevance but forfeits long-term leverage.** The act of deployment teaches clients how to internalize AI capability. Once internalized, the consultant's role becomes optional.

This creates a predictable cycle:

- **Access** — AI companies partner with consultants for enterprise trust and regulatory comfort
- **Deployment** — Consultants lead implementation and change management
- **Internalization** — Clients absorb capability; teams operate agents directly
- **Bypass** — Billable hours collapse; consultants are routed around

The data confirms the exposure:

- **22% of firms are Blocked** (11 of 50) — invisible to AI systems entirely
- **McKinsey**, the most prestigious strategy firm, scores ECC 0 — blocked and illegible
- **The Big Four are split** — EY-Parthenon (81) open; PwC and Strategy& blocked
- **Execution-heavy IT consultancies show the widest variance** — from Atos (90) to Infosys (0)

Partnership is not protection. Partnership is exposure.

ARCHETYPES

1. Blocked Prestige Firms

"We preserve mystique through opacity."

These firms are historically elite with strong human reputation but actively block AI crawlability. Minimal machine-readable authority despite maximum brand recognition.

Strategic outcome: Prestige without legibility decays faster than mid-tier openness. These firms are bypassed, referenced less, and gradually irrelevant to AI-driven discovery.

Typical traits: Blocked posture, ECC = 0, Low capability

Examples:

McKinsey & Company (0), Kearney (0), Strategy& (0), PwC Advisory (0), Alvarez & Marsal (0), Infosys (0), EPAM Systems (0), Gartner (0), Frost & Sullivan (0)

2. Defensive Interpreters

"We will be seen — but not fully parsed."

These firms maintain open or semi-open posture with strong frameworks, narratives, and synthesis. They have limited proprietary assets and judgment is outsourced rather than owned.

Strategic outcome: Survive longest in narrative-heavy environments but lose pricing power as AI internalizes interpretation. Slow decay with margin compression before revenue decline.

Typical traits: Defensive posture, Mid-range ECC, Medium capability

Examples:

Boston Consulting Group (65), Deloitte Consulting (68), Tata Consultancy Services (68), CGI Group (66), ZS Associates (57), Slalom (67), Aon (64), Cornerstone Research (60), Analysis Group (78)

3. Execution Parasites

"We sell human labor at scale."

Revenue tied directly to billable hours — engineering, implementation, transformation work. Minimal authority over outcomes. Execution replaces thinking.

Strategic outcome: AI systems collapse execution demand by reducing human labor requirements per outcome. Fast repricing, sudden relevance loss. Primary short candidates.

Typical traits: Open or Blocked posture, Low to Medium ECC, Low capability

Examples:

Cognizant (53), Infosys (0), Marsh McLennan (56), Guidehouse (61), IBM Consulting (61)

4. Transitional Authority Holders

"We own assets adjacent to execution."

Platform integration, data adjacency, partial outcome ownership. Execution augmented — but not replaced — by AI. These firms retain structural relevance while margins reset.

Strategic outcome: Survivors, not compounders. Authority preserved, growth capped. They endure the transition but do not escape it.

Typical traits: Open posture, High ECC, Medium to High capability

Examples:

Accenture (81), Capgemini (83), Atos (90), EY-Parthenon (81), Willis Towers Watson (80), Mercer (78), AlixPartners (74), KPMG Advisory (74)

5. Authority Compounds

"We own judgment, not execution."

Clear value propositions, outcome ownership, and structural legibility. These firms are positioned on the right side of the execution-authority divide.

Strategic outcome: Durable positioning as AI commoditizes execution. Authority compounds as competitors become illegible or irrelevant.

Typical traits: Open posture, High ECC (80+), High capability

Examples:

FTI Consulting (92), Forrester (91), Atos (90), Publicis Sapient (86), Thoughtworks (85), L.E.K. Consulting (83), Capgemini (83), Globant (83), ClearView Healthcare Partners (82), Bain & Company (81), EY-Parthenon (81), Accenture (81), IDC (80), West Monroe (80), Willis Towers Watson (80)

PROFESSIONAL SERVICES INDEX

Company	Type	Posture	ECC	Cap.	Archetype
FTI Consulting	Specialized/Boutique	Open	92	High	Authority Compounder
Forrester	Research/Advisory	Open	91	High	Authority Compounder
Atos	IT/Mgmt Consulting	Open	90	High	Authority Compounder
Publicis Sapient	Tech/Digital Consulting	Open	86	High	Authority Compounder
Thoughtworks	Tech/Digital Consulting	Open	85	High	Authority Compounder
L.E.K. Consulting	Strategy Consulting	Open	83	High	Authority Compounder
Capgemini	IT/Mgmt Consulting	Open	83	High	Authority Compounder
Globant	Tech/Digital Consulting	Defensive	83	High	Authority Compounder
ClearView Healthcare	Specialized/Boutique	Open	82	High	Authority Compounder
Bain & Company	Strategy Consulting	Open	81	High	Authority Compounder
EY-Parthenon	Big Four Consulting	Open	81	High	Authority Compounder
Accenture	IT/Mgmt Consulting	Open	81	High	Transitional Authority Holder
West Monroe	Specialized/Boutique	Open	80	High	Authority Compounder
IDC	Research/Advisory	Open	80	High	Authority Compounder
Willis Towers Watson	Specialty	Open	80	High	Transitional Authority Holder
Mercer	Specialized/Boutique	Open	78	Medium	Transitional Authority Holder
Analysis Group	Specialized/Boutique	Defensive	78	Medium	Defensive Interpreter
Oliver Wyman	Strategy Consulting	Open	76	Medium	Transitional Authority Holder
Huron Consulting	Specialized/Boutique	Open	76	Medium	Transitional Authority Holder
AlixPartners	Specialized/Boutique	Open	74	Medium	Transitional Authority Holder
KPMG Advisory	Big Four Consulting	Open	74	Medium	Transitional Authority Holder
Wipro	IT/Mgmt Consulting	Open	73	Medium	Transitional Authority Holder
Roland Berger	Strategy Consulting	Open	69	Medium	Transitional Authority Holder
Arthur D. Little	Strategy Consulting	Open	69	Medium	Transitional Authority Holder
Deloitte Consulting	Big Four Consulting	Defensive	68	Medium	Defensive Interpreter
TCS	IT/Mgmt Consulting	Defensive	68	Medium	Defensive Interpreter
DXC Technology	IT/Mgmt Consulting	Open	68	Medium	Transitional Authority Holder
Slalom	Tech/Digital Consulting	Defensive	67	Medium	Defensive Interpreter
CGI Group	IT/Mgmt Consulting	Defensive	66	Medium	Defensive Interpreter
BCG	Strategy Consulting	Defensive	65	Medium	Defensive Interpreter
Simon-Kucher	Specialized/Boutique	Open	65	Medium	Transitional Authority Holder
NTT Data	IT/Mgmt Consulting	Open	65	Medium	Transitional Authority Holder
Aon	Specialty	Defensive	64	Medium	Defensive Interpreter
Genpact	Tech/Digital Consulting	Open	63	Medium	Transitional Authority Holder
IBM Consulting	IT/Mgmt Consulting	Open	61	Medium	Execution Parasite
Guidehouse	Specialized/Boutique	Open	61	Medium	Execution Parasite
Cornerstone Research	Specialized/Boutique	Defensive	60	Medium	Defensive Interpreter
ZS Associates	Specialized/Boutique	Defensive	57	Low	Defensive Interpreter

Company	Type	Posture	ECC	Cap.	Archetype
Marsh McLennan	Specialty	Open	56	Low	Execution Parasite
Cognizant	IT/Mgmt Consulting	Open	53	Low	Execution Parasite
McKinsey & Company	Strategy Consulting	Blocked	0	Low	Blocked Prestige Firm
Kearney	Strategy Consulting	Blocked	0	Low	Blocked Prestige Firm
Strategy&	Strategy Consulting	Blocked	0	Low	Blocked Prestige Firm
PwC Advisory	Big Four Consulting	Blocked	0	Low	Blocked Prestige Firm
Infosys	IT/Mgmt Consulting	Blocked	0	Low	Blocked Prestige Firm
Alvarez & Marsal	Specialized/Boutique	Blocked	0	Low	Blocked Prestige Firm
EPAM Systems	Tech/Digital Consulting	Blocked	0	Low	Blocked Prestige Firm
Gartner	Research/Advisory	Blocked	0	Low	Blocked Prestige Firm
Frost & Sullivan	Research/Advisory	Blocked	0	Low	Blocked Prestige Firm

STRATEGIC IMPLICATIONS

AI is decomposing the consulting value chain function by function — and ECC reveals which firms are positioned to survive the unbundling.

Execution is being repriced fastest.

Firms dependent on billable hours and offshore delivery (Cognizant, Infosys, traditional IT services) face immediate margin compression. AI reduces human labor requirements per outcome. The consulting pyramid collapses from the bottom up.

Interpretation without ownership is unstable.

Strategy firms that synthesize and advise but do not own outcomes (BCG, Deloitte Consulting) retain narrative value but lose pricing power. AI synthesizes faster and cheaper. Interpretation alone does not constitute authority.

Blocking preserves nothing.

McKinsey, Gartner, and PwC have chosen opacity. In an AI-mediated discovery environment, this is strategic invisibility. When a client asks an AI system "which consulting firm should I hire for digital transformation?", blocked firms cannot be recommended.

Judgment remains scarce.

Firms and individuals that retain accountability under uncertainty score structurally higher. FTI Consulting (92), Forrester (91), and the boutique specialists demonstrate that authority accrues to those who own outcomes — not those who advise on them.

The Partner-Parasite Cycle is already observable.

Every new AI-consulting partnership strengthens the system that ultimately renders the consultant optional:

1. AI partners with consultants for access and trust
2. Consultants deploy and legitimize AI
3. Clients internalize AI capability
4. Consultants are bypassed

The ECC scores identify where each firm currently sits in that cycle.

What survives is not execution, not interpretation, not scale.

What survives is **judgment**: ownership of outcomes, responsibility when systems fail, boundary setting under uncertainty. That layer does not scale through pyramids. It accrues to individuals and entities with clear authority.

FULL REPORT

The consulting industry is not collapsing overnight. It is being decomposed function by function.

This decomposition follows a clear logic. Consulting firms historically monetized three capabilities: interpretation of complex information, execution at scale through human labor, and institutional permission to act.

AI systems now perform the first two at near-zero marginal cost. Interpretation — synthesis, analysis, pattern recognition — is precisely what large language models excel at. Execution — implementation, process design, transformation — is what agentic AI systems increasingly automate.

What remains is the third function: permission. Boards do not adopt transformational systems because they are powerful. They adopt them because someone credible absorbs the risk of being wrong. Consulting firms exist to serve this liability-buffering function.

But permission without execution is a shrinking wedge.

The Data

We analyzed 50 global consulting and professional services firms across six categories: Strategy Consulting, Big Four Advisory, IT/Management Consulting, Specialized Boutiques, Technology/Digital Consulting, and Research/Advisory.

The results reveal structural fractures:

- **62% are Open** to AI systems (31 of 50)
- **22% are Blocked** entirely (11 of 50)
- **30% achieve High Capability** (15 of 50)
- **22% score Low Capability** (11 of 50)

The correlation between blocking and low capability is near-perfect. Every blocked firm scores ECC 0 and Low capability. Prestige does not override illegibility.

The MBB Fracture

The most striking finding is the divergence among elite strategy firms: McKinsey & Company — the most prestigious consulting brand globally — is blocked with ECC 0. Bain & Company is fully open with ECC 81. Boston Consulting Group sits in between at 65 with a defensive posture. This is not a technical accident. These are strategic choices about how to engage (or not engage) with AI-mediated discovery. McKinsey has chosen mystique over legibility. When AI systems intermediate "which strategy firm should I hire?", McKinsey cannot participate in the answer.

The Execution Cliff

IT/Management consulting shows the widest variance — and the clearest risk exposure. At the top: Atos (90), Capgemini (83), Accenture (81). These firms have invested in platform integration, data adjacency, and structural legibility. They are positioned as Transitional Authority Holders — they survive the transition but do not escape it. At the bottom: Cognizant (53), Infosys (0). These firms are most dependent on human execution — billable hours, offshore delivery, implementation labor. AI systems collapse this demand by reducing human labor requirements per outcome. The execution-dependent firms face the steepest repricing. They are Execution Parasites in the new taxonomy — useful during deployment phases, unnecessary afterward.

The Research Bifurcation

Research and advisory firms present a stark binary. FTI Consulting (92), Forrester (91), and IDC (80) are fully legible Authority Compounds. Their research can be cited, synthesized, and referenced by AI systems. Gartner (0) and Frost & Sullivan (0) are blocked. The largest research firm by market cap (~\$40B) has chosen to be invisible to the systems that increasingly mediate how research is discovered and consumed. This is a consequential bet. When AI synthesizes market research for enterprise decisions, Gartner cannot be included.

The Boutique Advantage

Specialized boutiques outperform prestige generalists: FTI Consulting (92) — restructuring and litigation; L.E.K. Consulting (83) — strategy with sector depth; ClearView Healthcare Partners (82) — healthcare-specific strategy; West Monroe (80) — technology and operations; McKinsey & Company (0) — blocked. The pattern is clear: firms with focused value propositions and outcome ownership score higher than firms with broad brands and advisory positioning. Authority accrues to clarity, not prestige.

The Partner-Parasite Cycle

These findings empirically support what we call the Partner-Parasite Cycle:

1. **Access** — Frontier AI companies partner with consulting firms to access enterprise trust, board-level permission, regulatory comfort, and organizational legitimacy.
2. **Deployment** — Consulting firms lead AI implementation: strategy framing, process redesign, change management, initial execution. Consultants appear indispensable.
3. **Internalization** — Clients absorb the capability. AI tools move in-house. Teams learn to operate agents directly. Decision cycles compress. Human labor is reduced, not augmented.
4. **Bypass** — Once AI systems execute autonomously, billable hours collapse. Execution becomes abundant. Consultants are routed around. Remaining value is reduced to ceremonial oversight.

The ECC scores identify where each firm currently sits in this cycle. High-ECC firms are visible during all four stages. Blocked firms are invisible from the start.

What Survives

The consulting industry will not disappear. But it will be structurally transformed.

What decays: Execution at scale, Interpretation without ownership, Prestige without legibility, Billable hours as a business model.

What survives: Judgment under uncertainty, Accountability for outcomes, Boundary setting when systems fail, Permission that cannot be automated.

These functions do not scale through consulting pyramids. They accrue to individuals and entities with clear authority. The firms that compound authority — FTI, Forrester, Bain, the specialized boutiques — are positioned for durability. The firms that sell execution — or hide behind prestige — face structural repricing.

The discovery layer is being rewritten. The consultants who survive are the ones who can be discovered.

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