ENTITY CLARITY REPORT

PROFESSIONAL SERVICES & CONSULTING

January to July 2026 Update

The continuously legible core strengthened, but three exits tightened the access boundary and erased most of the aggregate gain.

48-ENTITY MATCHED PANEL

DATA AS OF 30 JUL 2026

ECI-ECC-V1

Judgment, execution, capital allocation, and M&A

REVISION V1.0 / DATASET 2.0.0

The core strengthened; the boundary tightened

A nearly flat mean concealed a 6.5-point median gain, capability escalation, and three consequential exits from legibility.

-0.40

MEAN ECC CHANGE

59.83 to 59.44 across the matched panel.

+6.5

MEDIAN CHANGE

The median rose from 68.5 to 75.0.

35%

MEANINGFUL MOVERS

17 of 48 entities cleared the movement rule.

1 / 3

ENTRIES / EXITS

One entered legibility; three moved into Blocked.

The signal

The 36 continuously legible firms added 124 ECC points and High capability expanded from 15 to 18. Yet three exits removed 231 points, more than offsetting the core's improvement and one 88-point entry.

Why it matters

For boards, buyers, and capital providers, the sector is not uniformly improving or retreating. Authority is compounding inside the visible core while access decisions create abrupt underwriting, diligence, and integration discontinuities.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

PANEL INTEGRITY

A corrected 49-entity registry and 48-entity match

The January report stated 50 firms, but its authoritative Index contained 49. One registered entity lacks a July observation and is excluded.

49 REGISTERED entities

48 OBSERVED entities

48 MATCHED entities

Observation states

State	Count	Description
Continuously legible	36	Observed above zero at both dates
Legibility entries	01	Blocked in January; legible in July
Legibility exits	03	Legible in January; Blocked in July
Blocked at both dates	08	Zero ECC at both observations

QA STATUS

- **48/48 matched observations**
- **0 source-delta mismatches**
- **0 blocked-score exceptions**
- **1 registered entity excluded**

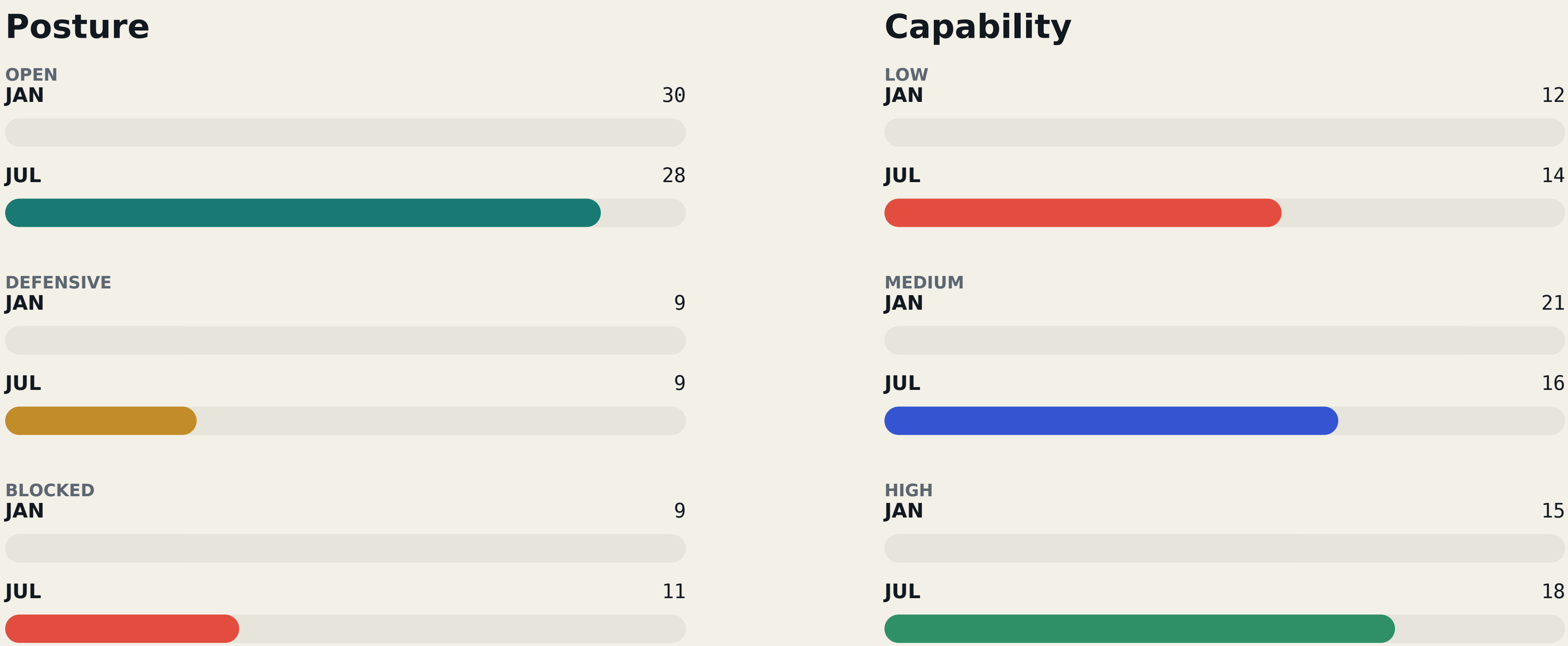
Cornerstone Research

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

DISTRIBUTION SHIFT

Capability rose while access contracted

High capability expanded inside the visible panel, but the number of Open entities declined and Blocked increased.



Interpretation

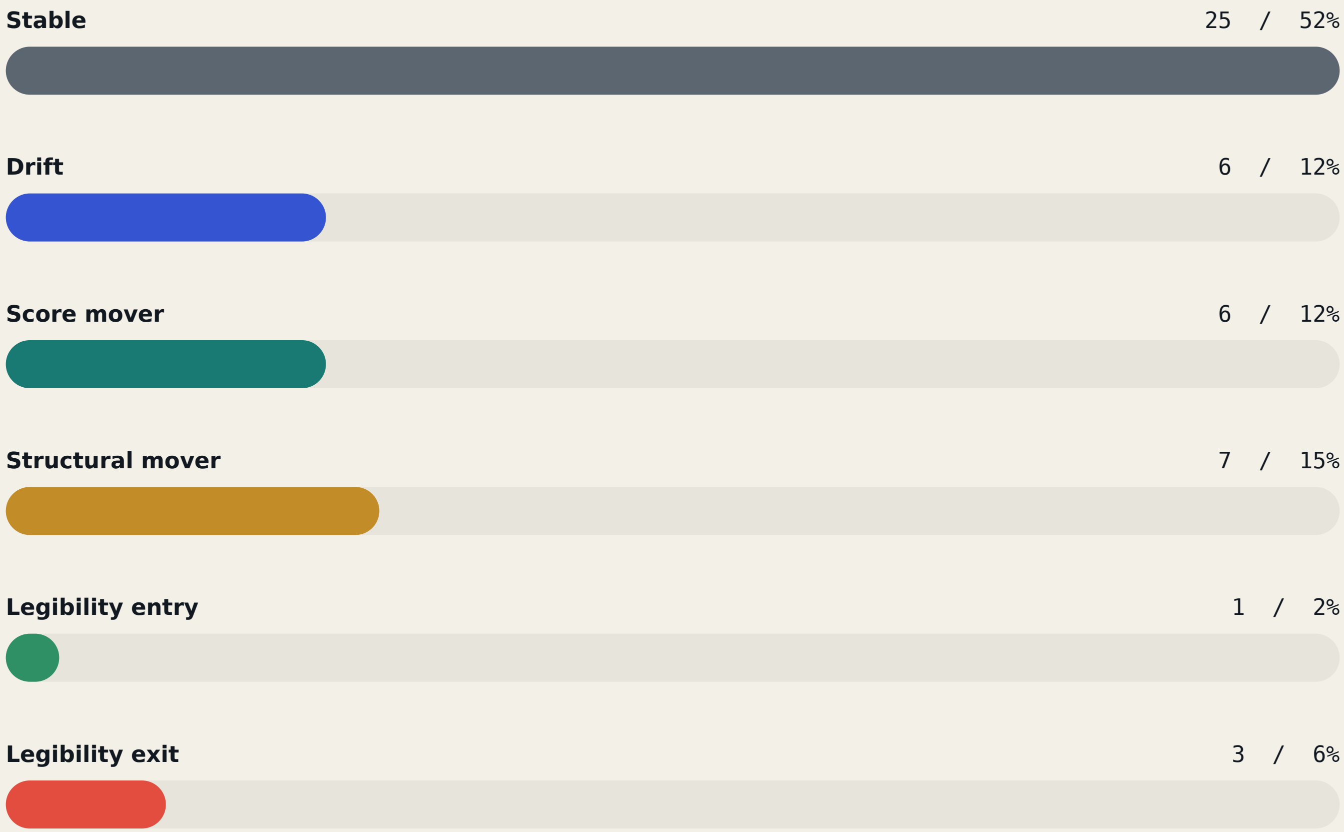
The sector's machine-facing capability improved among legible firms even as overall access narrowed. This is a divergence between authority quality and authority availability, not a single directional move.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

MOVEMENT CLASSES

Seventeen firms carried the meaningful change

Meaningful movement includes entries, exits, structural changes, and score changes of at least five points.



17

MEANINGFUL MOVERS

35% of the panel

The sector clears the 20% materiality gate despite a nearly flat aggregate mean.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

ACCESS-STATE TRANSITIONS

One entry, three exits, and a smaller Open cohort

The posture map tightened even as the continuously legible core became more capable.

JANUARY -> JULY

Open	28	1	1
Defensive	0	7	2
Blocked	0	1	8

What changed

One blocked entity entered Defensive. One Open entity moved to Defensive, two Open entities exited to Blocked, and one Defensive entity exited to Blocked.

Interpretation boundary

A posture transition identifies an access-state change. It does not establish motive; IP protection, technical policy, risk control, or strategic retreat require separate evidence.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

CONCENTRATED MOVEMENT

Seventeen entities carried the meaningful change

Names and structural transitions are shown here; authoritative entity-level ECC values remain in the Index.

Frost & Sullivan — LEGIBILITY ENTRY
`Blocked/Low -> Defensive/High`

Globant — LEGIBILITY EXIT
`Defensive/High -> Blocked/Low`

Willis Towers Watson — LEGIBILITY EXIT
`Open/High -> Blocked/Low`

Tata Consultancy Services (TCS) — LEGIBILITY EXIT
`Defensive/Medium -> Blocked/Low`

Roland Berger — STRUCTURAL MOVER
`Open/Medium -> Open/High`

Boston Consulting Group (BCG) — STRUCTURAL MOVER
`Defensive/Medium -> Defensive/High`

NTT Data — STRUCTURAL MOVER
`Open/Medium -> Open/High`

Capgemini — SCORE MOVER
`Open/High; material score change`

Slalom — STRUCTURAL MOVER
`Defensive/Medium -> Defensive/High`

DXC Technology — STRUCTURAL MOVER
`Open/Medium -> Open/High`

IDC — SCORE MOVER
`Open/High; material score change`

CGI Group — SCORE MOVER
`Defensive/Medium; material score change`

Thoughtworks — SCORE MOVER
`Open/High; material score change`

KPMG Advisory — SCORE MOVER
`Open/Medium; material score change`

Wipro — SCORE MOVER
`Open/Medium; material score change`

ClearView Healthcare Partners — STRUCTURAL MOVER
`Open/High -> Open/Medium`

Publicis Sapient — STRUCTURAL MOVER
`Open/High -> Defensive/High`

Source: EXMXC Entity Clarity dataset v2.0.0. Entity-level ECC values appear only in the authoritative Index.

Four patterns define the Consulting update

Authority quality improved inside the visible market even as access choices made the sector less uniformly legible.

01

A stronger visible core

Continuously legible firms generated a substantial net gain, the median rose, and High capability expanded. Judgment-oriented authority is becoming more structured and machine-usable.

02

Access discontinuity

Three exits removed more ECC points than the continuous cohort and the single entry added. A few access decisions can overwhelm broad capability progress.

03

Defensive capability

Several firms reached High capability while retaining Defensive posture. Strong machine legibility can coexist with controlled narrative exposure.

04

Firm versus expert authority

Professional-services value may reside in the institution, its methods, its client evidence, or individual rainmakers. Transaction diligence must determine where authority actually survives.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

Underwrite where judgment and authority actually reside

Professional-services transactions can lose value when expertise, methods, client proof, brands, and public identity do not survive ownership or leadership change.

SCREEN

Discovery

Can models resolve the firm, practices, experts, methods, outcomes, and authoritative domains?

>

DILIGENCE

Durability

Is authority institutional, contract-bound, method-based, or concentrated in individual rainmakers?

>

UNDERWRITE

Transferability

Will client trust, talent, referral flow, and machine-visible authority transfer under new ownership?

>

INTEGRATE

Continuity

Can the buyer preserve expert attribution, practice identity, evidence, and canonical disclosure paths?

Decision rule

Treat ECC as a machine-interpretability and governance signal - not as service quality, client retention, talent quality, investment quality, or enterprise value. Use it to locate diligence gaps and design identity controls for integration.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

A governed registry-to-observation comparison

The report reconciles the historical Index to the current release, excludes the single missing observation, and compares 48 entities at both dates.

1 Reconcile

Correct the historical registry count from the authoritative January Index.

2 Match

Match 48 supplied January and July observations; exclude one missing entity.

3 Validate

Check dates, categorical domains, deltas, and the Blocked = 0 rule.

4 Classify

Assign one movement class and aggregate only the matched panel.

Movement taxonomy

Legibility entry	Blocked -> non-Blocked
Legibility exit	non-Blocked -> Blocked
Structural mover	Posture or capability changed while continuously legible
Score mover	Absolute ECC change >= 5 without structural change
Drift	Nonzero absolute change < 5 without structural change
Stable	No change

Governance record

METHODOLOGY	eci-ecc-v1
DATASET	2.0.0
BASELINE	2026-01-20
DATA AS OF	2026-07-30
REVISION	v1.0
RECORD STATUS	Published

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

AUTHORITATIVE INDEX GUIDE

How to read the entity-level record

The following two pages are the authoritative matched-panel Index. Every ECC value is paired with posture and capability.

Entity

The matched organization name in the governed panel.

Jan / Jul posture

Open, Defensive, or Blocked access posture.

Jan / Jul capability

Low, Medium, or High demonstrated capability.

Jan / Jul ECC

Entity Clarity Coefficient for the observation date.

Delta

July ECC minus January ECC.

Class

Mutually exclusive longitudinal movement class.

Important ECC measures entity clarity in AI-mediated interpretation. It does not establish motive and is not a rating of service quality, talent, financial performance, management quality, or investment attractiveness.

Source: EXMXC Entity Clarity dataset v2.0.0; observations 20 Jan and 30 Jul 2026.

Consulting entities 1-24 of 48

January and July observations shown together. This is the sole entity-level ECC record in the report.

# / Entity	Jan P	Jan C	ECC	Jul P	Jul C	ECC	Delta	Class
01 McKinsey & Company	Blocked	Low	0	Blocked	Low	0	0	Stable
02 Boston Consulting Group (BC...	Defensive	Medium	65	Defensive	High	82	+17	Structural Mover
03 Bain & Company	Open	High	81	Open	High	81	0	Stable
04 Kearney	Blocked	Low	0	Blocked	Low	0	0	Stable
05 Roland Berger	Open	Medium	69	Open	High	89	+20	Structural Mover
06 L.E.K. Consulting	Open	High	83	Open	High	86	+3	Drift
07 Oliver Wyman	Open	Medium	76	Open	Medium	76	0	Stable
08 Strategy&	Blocked	Low	0	Blocked	Low	0	0	Stable
09 Deloitte Consulting	Defensive	Medium	68	Defensive	Medium	69	+1	Drift
10 Arthur D. Little	Open	Medium	69	Open	Medium	69	0	Stable
11 PwC Advisory	Blocked	Low	0	Blocked	Low	0	0	Stable
12 EY-Parthenon	Open	High	81	Open	High	81	0	Stable
13 KPMG Advisory	Open	Medium	74	Open	Medium	68	-6	Score Mover
14 Accenture	Open	High	81	Open	High	81	0	Stable
15 IBM Consulting	Open	Medium	61	Open	Medium	61	0	Stable
16 Capgemini	Open	High	83	Open	High	97	+14	Score Mover
17 Cognizant	Open	Low	53	Open	Low	53	0	Stable
18 Infosys	Blocked	Low	0	Blocked	Low	0	0	Stable
19 Wipro	Open	Medium	73	Open	Medium	78	+5	Score Mover
20 Tata Consultancy Services (...	Defensive	Medium	68	Blocked	Low	0	-68	Legibility Exit
21 DXC Technology	Open	Medium	68	Open	High	81	+13	Structural Mover
22 CGI Group	Defensive	Medium	66	Defensive	Medium	76	+10	Score Mover
23 Atos	Open	High	90	Open	High	91	+1	Drift
24 NTT Data	Open	Medium	65	Open	High	82	+17	Structural Mover

Source: EXMXC Entity Clarity dataset v2.0.0. P = posture; C = capability. Baseline 20 Jan 2026; current 30 Jul 2026.

Consulting entities 25-48 of 48

January and July observations shown together. This is the sole entity-level ECC record in the report.

# / Entity	Jan P	Jan C	ECC	Jul P	Jul C	ECC	Delta	Class
25 AlixPartners	Open	Medium	74	Open	Medium	74	0	Stable
26 FTI Consulting	Open	High	92	Open	High	92	0	Stable
27 Alvarez & Marsal	Blocked	Low	0	Blocked	Low	0	0	Stable
28 Huron Consulting	Open	Medium	76	Open	Medium	73	-3	Drift
29 Guidehouse	Open	Medium	61	Open	Medium	63	+2	Drift
30 West Monroe	Open	High	80	Open	High	80	0	Stable
31 ZS Associates	Defensive	Low	57	Defensive	Low	57	0	Stable
32 Simon-Kucher	Open	Medium	65	Open	Medium	65	0	Stable
33 Mercer	Open	Medium	78	Open	Medium	78	0	Stable
34 Slalom	Defensive	Medium	67	Defensive	High	81	+14	Structural Mover
35 Thoughtworks	Open	High	85	Open	High	92	+7	Score Mover
36 EPAM Systems	Blocked	Low	0	Blocked	Low	0	0	Stable
37 Globant	Defensive	High	83	Blocked	Low	0	-83	Legibility Exit
38 Publicis Sapient	Open	High	86	Defensive	High	85	-1	Structural Mover
39 Genpact	Open	Medium	63	Open	Medium	63	0	Stable
40 Gartner	Blocked	Low	0	Blocked	Low	0	0	Stable
41 Forrester	Open	High	91	Open	High	91	0	Stable
42 IDC	Open	High	80	Open	High	92	+12	Score Mover
43 Frost & Sullivan	Blocked	Low	0	Defensive	High	88	+88	Legibility Entry
44 Marsh McLennan	Open	Low	56	Open	Low	59	+3	Drift
45 Willis Towers Watson	Open	High	80	Blocked	Low	0	-80	Legibility Exit
46 Aon	Defensive	Medium	64	Defensive	Medium	64	0	Stable
47 Analysis Group	Defensive	Medium	78	Defensive	Medium	78	0	Stable
48 ClearView Healthcare Partne...	Open	High	82	Open	Medium	77	-5	Structural Mover

Source: EXMXC Entity Clarity dataset v2.0.0. P = posture; C = capability. Baseline 20 Jan 2026; current 30 Jul 2026.

The core strengthened.
The boundary tightened.
The mean concealed both.

Professional-services authority is becoming more structured among visible firms, but access discontinuities can erase sector-level gains. The next release should test whether capability escalation persists and whether the three exits remain blocked.

Authoritative data

mcp.exmxc.ai/datasets/entity_clarity/releases/latest

Entity Clarity Index hub

exmxc.ai/entity-clarity-index