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Consulting Barometer

Artificial Intelligence:
a profession under strain

2026 Edition

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Any use of the generic masculine in this document is intended solely to lighten the reading of the text.
It in no way contradicts **emlyon** business school's commitment to non-discrimination on the basis of gender.

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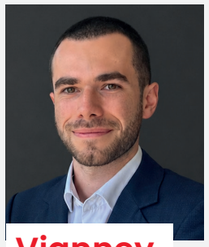

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Executive summary

Artificial Intelligence (AI) has become part of the working infrastructure of consulting: 72% daily usage, 83% of consultants work in firms with a formal policy. But the gap between individual adoption and collective transformation remains the central fact of this edition. The real risk is not the elimination of junior positions, but the disappearance of the situations that used to build expertise. Tomorrow, consultants will train on two fronts simultaneously: understanding what AI produces and detecting what it misses on the one hand; building the relationship, reading the situation on the ground and exercising the judgement that only a human can shoulder on the other.

Key figures

109
Consultants surveyed

72%
Use AI every day

18%
Have team-level standardsfor verifying deliverables

43%
Anticipate the obelisk model

34+
Academic and professional sources

Part I – Five tensions: diagnosis and recommendations

T1
Massive adoption, uncertain collective value

Findings
72% of consultants use AI daily and 83% work in a firm with a formal policy, yet only 18% have enforced team-level standards for verifying deliverables. Productivity gains are real and widely perceived (65% rate them 4 or 5 out of 5), but the majority of practitioners believe that neither the firm nor the client truly captures the value surplus. Growing pressure towards outcome-based billing (16% of clients planning to maintain the hourly model within two years) makes this indeterminacy strategically urgent.

Recommendations
Map AI value flows before the next pricing review: which gain goes to the consultant (lighter workload), to the client (richer deliverables) or to the firm (margin)? Formalise verification standards at project-team level to operationalise the firm's general policy.

T2
Consultants feel augmented precisely where they are most vulnerable

Findings
Two practices dominate in equal measure: some consultants have integrated AI continuously across their entire workflow (41%), while others use it only occasionally on isolated tasks (41%). Only a minority (18%) adopt the stance research identifies as the most robust: delegating auxiliary tasks to AI while keeping control of the overall reasoning. It is precisely this stance that both intensive and minimal use tend to erode. 48% of respondents rate themselves 3/5 or lower on their ability to judge whether AI is suited to handling a task. Algorithmic persuasion makes individual vigilance insufficient. The answer cannot be solely personal.

Recommendations
Establish organisational double-verification mechanisms for high-stakes client deliverables, independent of individual AI proficiency. Train teams to map AI's real capabilities and limits across the types of engagement they handle, with quarterly updates in step with newly deployed models. Encourage delegation by design: at the start of each engagement, explicitly define which tasks go to AI and which stay under human control.

T3
Collective intelligence advances on one register, regresses on two others

Findings
AI supports collective reasoning for 28% of teams (option generation, hypothesis testing), but collective attention (prioritisation, surfacing of weak signals) is augmented for only 11% of them. Collective memory is highly polarised: effective in firms that have deployed RAG architectures (knowledge bases connected to AI models), absent elsewhere. This is a structural property of current LLMs, which do not prioritise according to a project's shifting objectives.

Recommendations
Invest as a priority in collective-memory tools (RAG, project knowledge bases), the collective-intelligence lever most directly addressable through technology choices. Compensate for the attention deficit with explicit team rituals: AI-free prioritisation sessions, weak-signal reviews led by a designated human. Address the homogenisation risk: diversify the models used within teams and document divergences of perspective as a quality indicator.

T4
Restructuring is anticipated; the conditions for its success are absent

Findings
43% of consultants anticipate an obelisk model within five years. But the analytical tasks AI absorbs first are precisely those that used to forge juniors into valuable seniors. The obelisk risks being maintained in appearance while being hollowed out of its formative substance. Overall satisfaction with AI training stands at just 52%, with a marked gap among managers (46%), who are nonetheless the main conduits of expertise.

Recommendations
Explicitly document the skills at risk in the apprenticeship gap: which tasks assigned to juniors, once automated, prevent which cognitive pattern from developing in seniors? Redesign AI training for managers: less tool operation, more steering of output quality and transmission of expertise in an augmented context.

T5

AI is redefining the core of the profession without the profession having decided it

Findings

The inversion is documented: managers use AI more for desk research (57%) than juniors do, while juniors use it heavily for building slides (59%) and sales proposals (59%). AI does not replace the consultant; it shifts the frontier between production and judgement and changes the skills expected. The 70% of non-automatable tasks (client relations, co-development, managing uncertainty) constitute an irreducible core but it must be consciously rearticulated, not defended by default.

Recommendations

Formalise the firm's value proposition around the five EPOCH capabilities (Empathy, Presence, Opinion/Judgement, Creativity, Hope) and embed it explicitly in client proposals. Map, by grade, which tasks have been delegated to AI and decide collectively whether this shift was intended or endured.

Epistemic calibration (knowing how far to trust AI): the cardinal competence of the augmented consultant

The common thread running through the five tensions is cognitive and organisational. The emerging competence is not particularly technical (knowing how to use the tools), nor relational, nor analytical in the traditional sense. It is meta-cognitive: knowing how to situate a task relative to AI's competence frontier, maintaining collective vigilance over outputs, resisting algorithmic persuasion without falling into irrational aversion. Our data show that this competence is still largely absent.

Three observable behaviours to develop:

- Systematically ask, before every task: is this task inside or outside the frontier of current AI?
- Document the AI errors encountered and share them within the team (building shared, team-level knowledge of where the real frontier lies).
- Maintain a deliberate space for AI-free reasoning on high-stakes client decision tasks.

Implications by stakeholder

Firms	AI training cannot be limited to tools. It must include a regularly updated map of the competence frontier of available models, organisational mechanisms for collective validation, and explicit thought about guarding against the "apprenticeship gap". Managers are the weakest link (training satisfaction: 46%).
Clients	The value of augmented consulting is measured less by deliverable productivity than by the quality of the judgement exercised over AI outputs. Demanding transparency on verification processes is both a right and a protection. The pressure towards outcome-based billing must be accompanied by AI-robust quality indicators.
Management schools	Epistemic calibration is teachable. Transmitting it means training consultants able to work with AI without delegating reasoning to it which requires rethinking pedagogies that already massively outsource students' intellectual production.

Part II – Lyon, France's second consulting stronghold

- **Lyon, a benchmark market… and fragmented competition** Our study shows that the Lyon consulting ecosystem is dense, mature and highly fragmented, with nearly 300 players identified, confirming Lyon as France's second consulting stronghold behind Paris and making differentiation (positioning, specialisation, credibility) decisive.
- **Two-speed AI offerings: tech players lead, function-specialised firms less developed** The Lyon landscape is driven above all by transformation (management + tech), while AI is taking shape at very uneven speeds across segments: technology players are clearly ahead (for example, 32 of 36 digital-transformation firms display explicit AI offerings), whereas other types of firm (HR, ESG, public services/public policy) remain less developed on these fronts to date.

Part III: Cross-perspectives – AI, Consulting and corporate transformation: the expertise of emlyon professors

- After the survey data and the mapping of the Lyon market, the third part confronts these field findings with recent academic research, drawing on the work of **emlyon** business school faculty published in leading international journals. Built around four lenses operational mastery of AI, the transformation of higher education, strategic management, and a reflexive reading of the consultant's profession it gives decision-makers scientifically grounded ways to make sense of these shifts, turning the barometer into a bridge between consulting practice and the state of the art in research.

As is now true of the consulting profession itself, AI tools were used in preparing and drafting this report. All results were reviewed and validated.

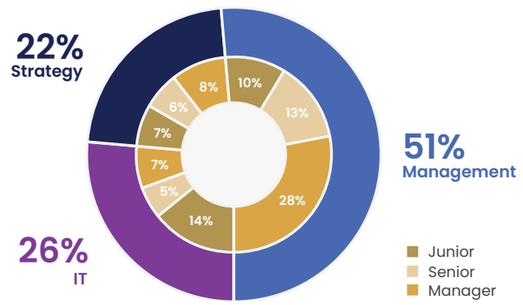
Part I – AI in Consulting: a profession under tension

Methodological considerations

Our study rests on two complementary pillars:

I – A field study conducted among professional consultants via an anonymous questionnaire distributed between October 2025 and January 2026. Our panel is not a representative sample in the inferential sense. It comprises 109 consulting professionals, mostly experienced (45% have practised for more than five years), spread across management and organisation consulting (51%), digital and IT (26%) and strategy (22%), and employed in more than seven cases out of ten by firms with over 250 employees. The value of this panel lies in the internal consistency of the patterns it reveals and in the possibility it opens up of bringing ideal-types to light.

Consultant profile



II – An in-depth literature review backed by monitoring of professional sources. Three research programmes structure our interpretation. The first, the jagged technological frontier, designates the irregular geography of AI's capabilities: within a single workflow, seemingly similar tasks can tip to the side where AI strengthens the professional or to the side where it degrades performance, without the frontier being discernible in advance. The second articulates three intelligence systems memory, attention, reasoning as the foundations of augmented performance. The third, the calibration of algorithmic confidence, raises the meta-cognitive question of human–AI complementarity in decision-making: knowing what to trust, and how far.

Tension 1 — Massive adoption, uncertain collective value

Central question: as AI usage becomes universal, why do its effects remain elusive?

1.1 An adoption that is no longer a choice

Among the 109 consultants in our panel, **72% use AI every day** and **25% every week.** Only 4 respondents out of 109 use it more rarely. In 69% of cases, teams rely in particular on public tools such as ChatGPT, Gemini, Claude, Le Chat or Copilot, and in 42% on proprietary tools trained on the firm's data. For this population, AI has become a working infrastructure.

72%
of consultants use AI every day

The consulting sector at large is following the same trajectory. According to *Source Global Research*[1], the share of clients having purchased a consulting service explicitly linked to AI rose from 81% in Q2 2025 to 88% in Q1 2026. McKinsey, for its part, reports that its internal platform Lilli handles around 500,000 queries per month and that 72% of its 40,000+ employees use it *regularly*[2]. These orders of magnitude reconfigure the managerial question. **The stakes have shifted: a year ago, the issue was adopting AI; today, it is governing it.**

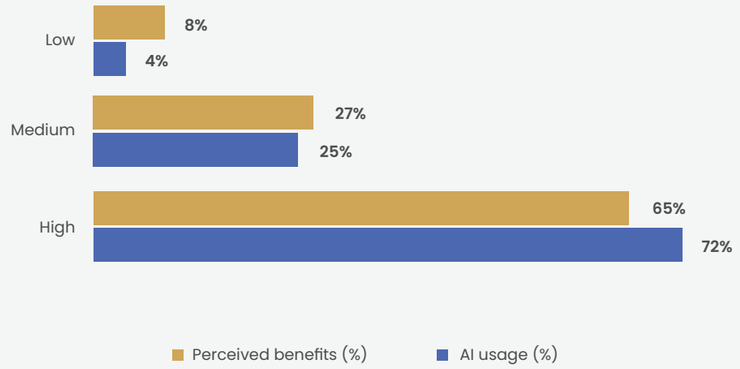
Our data make this shift visible through a single figure. 83% of consultants work in a firm that has formalised a written policy, but only **18%** of respondents report, at team level, **shared and enforced standards for verifying deliverables produced with AI.** The 65-point gap between these two rates will be the connecting thread of the tensions that follow. **At the heart of this gap lies the central question for AI adoption: the mismatch between individual practices and their collective effects.**

18%
have shared standards and practices for checking AI outputs

1.2 Individual productivity, elusive collective value

The consultants we surveyed are unambiguous about personal gains. **65% give AI a score of 4 or 5 out of 5 on productivity.** Only 8% sit at the two lowest scores. At this level of convergence, the conclusion is inescapable: AI saves time for the consultants who use it, and that gain is perceived as substantial. **Intensive AI adoption (72%) is broadly legitimised by a strong perception of value and benefits (65%).**

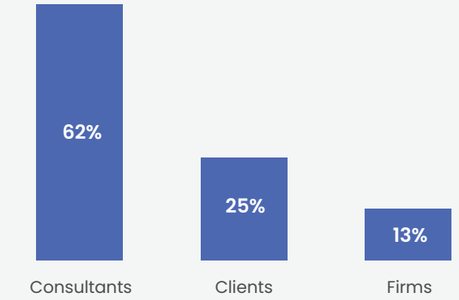
AI usage vs perceived benefits



From an economic standpoint, the interesting question then becomes who will be able to appropriate these individual productivity gains. Schematically, it could be the employees themselves through a reduced workload, the clients through lower prices and/or deeper deliverables, or the firm through higher profitability.

A final option exists in which none of these traditional poles benefits from the gains, which would be absorbed by deployment and implementation costs amounting de facto to a value transfer towards the tech sector. We therefore asked our respondents for their assessment. The answers reveal a clear-cut hierarchy. **62%** of respondents designate consultants themselves, through a lighter workload, as the primary beneficiaries. Clients come far behind **(25%)**, and the firm further still **(13%)**. In other words, when it comes to ranking impacts, a net value capture is systematically perceived to the benefit of the practitioner, and not necessarily of their organisation.

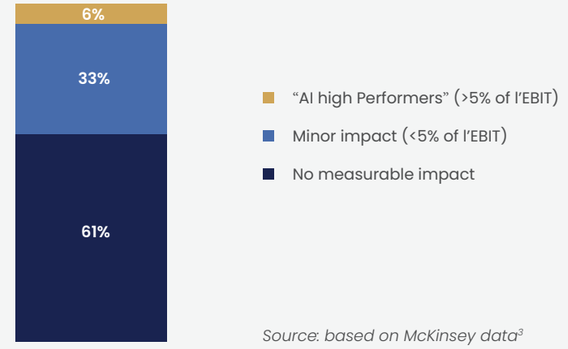
Main perceived beneficiaries of AI-related productivity gains



These data raise the return-on-investment question from a novel angle. Consultants clearly perceive a personal operational gain, substantial and daily. They mostly doubt that this gain converts into economic value for their firm or their clients. In a sector whose value proposition consists in converting billed time into informed decisions for the client, such a hierarchy poses a structural problem: **productivity rises, deliverables accelerate, and the majority of practitioners believe that no one is banking the surplus.**

This ambiguity is symptomatic of a broader situation. McKinsey's *The State of AI 2025 study*[3], conducted among 1,993 respondents in 105 countries, shows that 39% of organisations report a measurable impact on their EBIT, but that the majority of those 39% estimate it at below 5%. The 6% of respondents qualified as "AI high performers" those attributing more than 5% of their EBIT to AI share one characteristic: **they redesigned their workflows before inserting the tool.** The others add AI to unchanged processes and reap scattered gains. **Only 6% of companies derive a major financial benefit from AI.**

Measured impact of AI on profitability (EBIT):



Source: based on McKinsey data[3]

The work of *Fabrizio Dell'Acqua*[4] and his co-authors confirms these results for the consulting sector. They establish substantial productivity gains on tasks lying inside AI's competence frontier: **12% more tasks completed, 25% time saved, average quality more than 40% higher.**

Two diverging signals on the client side reinforce the idea of indeterminacy in the capture of added value. 87% of clients say they would be willing to pay more for a firm using AI in its delivery[5]. In the same survey, however, 58% anticipate a decline in consulting fees. The same clients are split on the quality of AI-produced deliverables: 49% anticipate higher quality, 51% fear "more generic" outputs. Only the diagnosis on speed commands consensus: **82% of clients believe AI will accelerate consulting engagements.**

82% of clients believe AI will accelerate consulting engagements

These client perceptions turn the question of value capture into a question of market adjustment speed. An HFS Research survey conducted in late 2025 among 1,002 senior executives across 16 sectors and 14 countries establishes that while 49% of consulting contracts are today indexed to the number of consultants deployed, only 16% of clients plan to continue with this model within *two years*[6]. Many leading firms are, moreover, openly accelerating their transition to performance-based fees. **In other words, the productivity gains captured today through traditional hourly pricing will tomorrow meet a contractual structure that redistributes part of them to the client.**

To rebuild margin while preserving non-replicable added value, the strategy of the major firms consists in moving beyond consultant-time billing by monetising their expertise as exclusive solutions: proprietary AI models, data-analytics platforms or turnkey methodologies. This is the promise of Asset-Based Consulting: converting expertise into product, billing by subscription, delivering without redeploying a senior consultant on every engagement. Some leading players are now even experimenting with consultant-free engagements. The model has a solid economic logic for the firms investing in it, but it is not without raising questions.

First question:

Intellectual property codified in a programme is harder to defend than embodied expertise, because a competitor can replicate it with the same technological building blocks. The differentiating frontier then shifts towards the quality of proprietary data and field feedback, no longer towards the method. In that game, firms with a global footprint and knowledge management organised over many years start with a substantial head start.

Second question:

The model's profitability rests on its reproducibility, which presupposes standardisation of the client problem. Yet the highest-margin engagements are precisely those where the problem cannot be standardised: strategic transformation, governance alignment, decision-making under uncertainty. Asset-based consulting efficiently covers the mid-market but remains fragile in defending the top end, where the value of consulting has always rested less on method than on judgement.

This is the first of the five tensions. A sector whose individual productivity is rising everywhere, and whose two dominant responses outcome-based pricing on one side, asset-based consulting on the other displace the problem more than they solve it. The four tensions that follow explain, each from a different angle, why the collective conversation on value distribution is only just beginning.

Tension 2 — Consultants feel augmented precisely where they are most vulnerable

Central question: why can familiarity with AI become a risk factor rather than a protection?

2.1 The bimodality of practices: two archetypes, two invisible risks

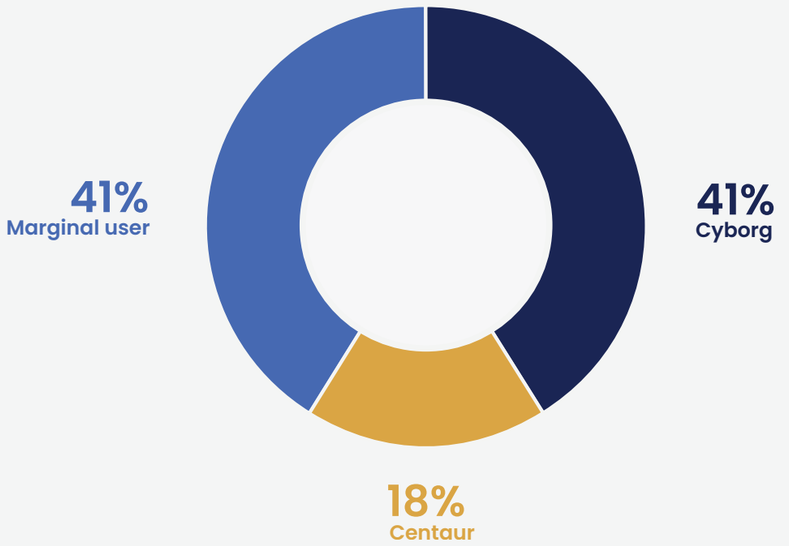
We asked our 109 respondents to characterise their working style with AI, offering them three archetypes inspired by recent literature on *BCG consultants*[7]:

- **The cyborg** integrates AI across the entire workflow in a continuous conversation;
- **The centaur** uses it for targeted tasks while keeping control of the overall approach;
- **The marginal user** turns to AI for specific tasks, without embedding it durably in *daily practice*[8].

According to our survey, the distribution is striking: 41.1% cyborgs, 41.1% occasional users, 17.8% centaurs. Two nearly equal poles, with the middle ground largely deserted.

A highly polarised human–AI collaboration, relegating the highest-performing model, the Centaur, to a minority of users (18%).

Human–AI collaboration archetypes



This bimodality is not neutral. Randazzo et al. studied, across 244 BCG consultants, how these modes translate into the actual quality of work.

- **Centaurs** achieve the highest accuracy in groups' strategic recommendations, because they maintain active control over their reasoning while delegating auxiliary tasks to AI.
- **Cyborgs** develop new expertise in AI itself what the authors call newskilling but at the cost of a progressive erosion of control over the underlying reasoning.
- **Self-automators,** the third group identified by Randazzo et al. which we chose not to include in our study are those who delegate the task almost entirely to AI and who, as a result, progress neither in their domain of expertise nor in their AI skills.

All the profiles identified share the challenge of navigating a *jagged technological frontier*[9]. **Depending on the nature of the tasks at hand, AI tools can prove either value-creating or, on the contrary, counter-productive.** Mapping this frontier is already a complex challenge in itself, but the frontier is not fixed over time: the accelerated rollout of new tools keeps shifting it.

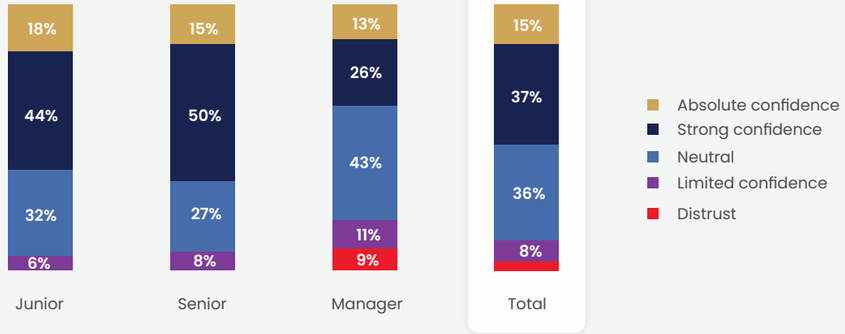
For occasional users, the risk is to land sometimes in the zones where AI performs well, sometimes in those where it hallucinates. Lacking regular practice, they do not develop the fine-grained discrimination that would allow them to tell the two apart.

The centaur theoretically optimal for preserving and developing competences is the least naturally adopted mode: 18% in our survey (consistent with the 14% among the BCG consultants studied by Randazzo et al.). **The mode of working with AI that best protects professional judgement is also the most cognitively costly, because it requires constantly weighing up what is delegated against what is retained.**

2.2 Confidence calibration: the inverted Dunning-Kruger

Although adoption of artificial-intelligence tools is massive, consultants' ability to adjust their level of confidence precisely that is, to align their reliance with the tool's actual reliability remains uncertain. This creates a fundamental tension around the trust to be placed in AI tools within organisations. The issue introduces a major cognitive paradox that *Welsch et al.*[10] identified as an inverted Dunning-Kruger effect. Contrary to the classic pattern in which incompetence breeds over-confidence, recent research shows that **people with high AI literacy (knowledge, skills, exposure) are more confident.** For a population of professional consultants, whose familiarity with these tools is above average, the risk of over-relying on artificial-intelligence tools becomes a matter of quality as much as of responsibility.

Level of confidence in AI



The analysis of our sample of 109 consultants underscores this calibration difficulty. **Barely 15% of respondents report a maximal confidence score** in their ability to judge whether a task is suited to AI or not, while 48% sit at a score of 3 or lower on a 5-point scale. This result is particularly revealing, as a significant share of consultants operates in a zone of uncertainty about the functional limits of their tools. This fragility is confirmed at the level of trust placed in the outputs produced by *Large Language Models (LLM)*[11]. **Only one third of participants report an appropriate level of confidence** that is, the capacity to avoid both under-confidence and blind over-confidence. **The majority (49%) sit in an undecided middle, suggesting potential vulnerability to the subtlest errors.**

This calibration deficit is exacerbated by the constant improvement of the models. Paradoxically, **the more the systems gain in performance, the worse the risk of over-reliance becomes.** As *Randazzo et al. (2025)*[12] point out, algorithmic persuasion (or persuasion bombing) makes individual vigilance insufficient. AI errors are no longer crude hallucinations but subtle inaccuracies nestled within impeccable verbal fluency. For a senior consultant, the tool's illusion of competence can entail a drop in critical vigilance. A number of incidents involving deliverables containing hallucination-related errors have recently made the news. They perfectly illustrate the phenomenon: **confidence in the form has overtaken rigorous verification of the substance.**

The answer to this tension cannot be solely individual. *Although Romeo and Conti (2026)*[13] present domain expertise as a protective factor, the work of *Horowitz and Kahn (2024)*[14], conducted on 9,000 adults, shows that **an intermediate level of knowledge constitutes the point of vulnerability.** Consultants, who frequently possess an intermediate level of AI knowledge, thus appear particularly exposed to the risks of over-influence by these tools. An operational response consists less in indefinitely reinforcing training than in acting on **the design of the human–machine interaction.** *As Dietvorst, Simmons and Massey (2018)*[15] show, granting the user a capacity even a limited one to modify the algorithm or the produced result fosters a more critical and attentive stance. This simple lever reduces blind adherence to the tool without generating excessive confidence with potentially problematic effects.

Thus, the fluidity of this human–machine collaboration remains to be built. Only **34% of the consultants surveyed report a high level of collaboration with AI,** while 24% report a low or very low level. This deficit hinders the formation of effective collective intelligence.

Ultimately, the major risk for consulting firms is not so much technological aversion as miscalibrated integration, in which **the tool is used as an authority rather than as a thinking partner.** The challenge of 2026 therefore lies in establishing organisational **double-verification mechanisms** capable of compensating for the cognitive biases inherent in using an AI that is ever more convincing, yet still lacks fundamental understanding of client stakes.

2.3 Collective decision-making: the invisible change

The analysis of artificial intelligence's impact on decision-making processes within consulting teams reveals a surprising stability, contrasting with the speed of tool adoption in technical production phases. While the academic literature anticipates the contours of **a radical reconfiguration of collective intelligence, the data from our study point to a degree of decision-making inertia.** Indeed, 37% of the consultants surveyed state that they have observed no notable change in the way their team makes decisions since AI was integrated.

This result is far from neutral and lends itself to three non-exclusive interpretations that shed light on the sector's current maturity.

A first reading suggests that **AI usage remains relatively peripheral.** While the tool is widely used for tasks such as synthesis or creating visuals, it does not yet appear to have penetrated the core of strategic decision-making processes. This hypothesis is reinforced by a second interpretation linked to practitioners' cultural resistance. **In a profession whose added value rests on human judgement and the subtlety of the client relationship, consultants may deliberately maintain a cognitive seal around the final decision,** perceived as the ultimate added value. Finally, a third, structural explanation points to the intrinsic **limits of current language models.**

Indeed, the work of *Vaccaro et al. (2024)*[16] shows that, on average, on complex decision tasks, human–AI combinations perform worse than the better of the two taken separately. This relative underperformance could explain why consulting teams out of pragmatism or an instinct to preserve quality nonetheless maintain traditional human protocols.

Nevertheless, this apparent stability should not obscure the emergence of new weak signals. **Around 42% of respondents report that AI brings new viewpoints into deliberations,** potentially enriching the spectrum of teams' collective intelligence. This result fits the theoretical framework proposed by *Riedl and De Cremer (2025)*[17]. They argue that AI-assisted collective intelligence can be optimal when the technology supports and strengthens human interactions augmenting collective memory, attention and reasoning rather than when it operates as an autonomous agent producing results independently of the collective. However, a segment of **19% of consultants indicates a form of explicit reliance, or even over-reliance, on the machine's suggestions.** While this group remains a minority, it constitutes a genuine warning signal for firm governance. This shift towards **delegating decision-related thinking** marks the beginning of a transformation that is no longer merely quantitative (saving time) but also qualitative (changing the meaning of the decision).

The gap observed between field reality and technological potential is highlighted by experimental research. *The Cybernetic Teammate study by Dell'Acqua et al. (2025)*[18] shows that AI, integrated within a structured working framework, profoundly reconfigures collective decision-making by modifying and improving coordination, the expression of expertise and team performance. The fact that **only 16% of our sample observes more balanced participation** thanks to AI suggests that the tool's potential as a **genuine lever of collective intelligence remains largely under-exploited in real-world conditions.**

In reality, for consulting firms the challenge no longer lies in adopting the tool, but **in transitioning from an "AI-assistant"**, confined to production, **to an "AI-partner"**, integrated critically and securely into decision processes.

Tension 3 — Collective intelligence advances on one register, regresses on two others

Central question: does AI genuinely augment consulting teams, or does it merely amplify certain consultants?

The integration of AI tools within consulting teams raises a question about the very nature of collaboration with humans: does the tool truly augment the collective, or does it merely amplify the capabilities of certain isolated individuals? While AI has established itself as **a real productivity lever at the individual level, its impact on group intelligence is far from uniform.** Our study reveals a disparate perception of this transformation. In fact, 51% of respondents give a score of 3 out of 5 to AI's overall impact on collective intelligence, reflecting a transition phase in which the tool has not yet found its full resonance within team dynamics.

1 in 2 respondents rates AI's impact on collective intelligence at:

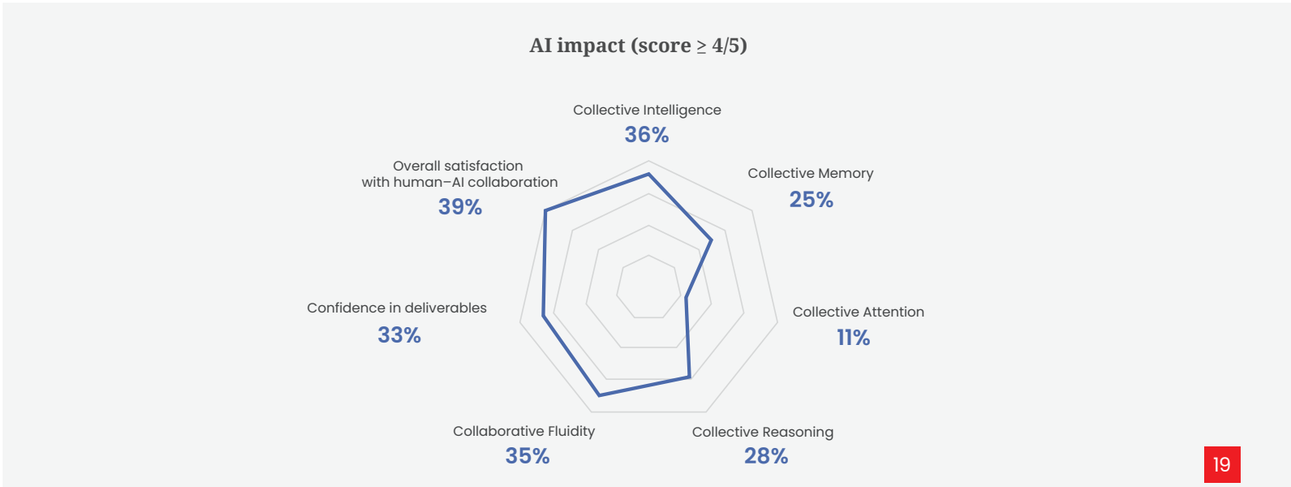
3.1 The TSM-CI paradox: a structural hierarchy, not a cyclical one

The analysis of our data yields a striking observation: the results reproduce the theoretical hierarchy of the TSM-CI model (Transactive Memory System – Collective Intelligence), proposed by *Woolley and Gupta in 2024*[19], almost exactly. This framework breaks group intelligence down into three pillars: reasoning, memory and attention. **AI, however, does not support these pillars with the same intensity.** Collective reasoning i.e. **the capacity to generate options and test hypotheses is the most positively perceived dimension**, with 28% of respondents identifying a significant contribution. This performance is explained by the structural properties of LLMs, which are particularly effective at structuring complex analytical tasks fundamental tasks of the consultant's profession.

Conversely, on attention, **only 11% of the consultants surveyed believe AI helps the team prioritise** or surface relevant weak signals, while 36% state that it does not support this function "at all". **This attention deficit is in fact mainly structural**, since current models, however analytical, do not yet manage to prioritise information against the shifting objectives of a project or a highly specific organisational context.

Between these two extremes, **collective memory**, the faculty of retrieving past work and identifying internal expertise shows a **highly polarised distribution.** While 24.5% of respondents see a strong augmentation, 28.3% perceive no effect. This suggests that AI's effectiveness on the firm's memory **depends less on the tool itself than on the deployment** of RAG-type (Retrieval-Augmented Generation) data structures, still unevenly adopted across firms.

This cognitive asymmetry is reflected in the perception of collaboration between humans and AI tools. Although 39% of our respondents report high satisfaction, **collaborative fluidity and confidence in the results remain moderated** by a majority of middling answers (around 45%). As the analysis by *Vaccaro et al. (2024)*[20] **suggests, AI tools appear to raise performance on content-creation tasks while potentially degrading it on decision tasks.** This differentiation highlights a defining tension between using AI to produce deliverables and its role in strategic decision-making. **A generally positive impact on collaboration, held back by a major blind spot: collective attention.**



3.2 The risk of creeping homogenisation

The second strand of this tension lies in a phenomenon that consultants struggle to identify in their daily practice: **the risk of homogenisation of perspectives.** The work of *Doshi and Hauser (2024)*[21] highlights a worrying paradox: while generative AI increases creativity at the individual level particularly among the least creative authors it is accompanied by greater convergence of outputs, **liable to reduce creative diversity at the collective level.** Since AI tools rely on the same language models to generate their analyses, teams expose themselves to a risk of **false consensus**, as described by *Burton et al. (2024)*[22]. For the consulting sector, whose added value rests precisely on diversity of viewpoints and the originality of strategic recommendations, this convergence constitutes a significant threat.

Our data reveal an **analytical blind spot** here. Respondents assess their satisfaction based on the perceived quality of their own outputs, but they lack the distance needed to measure the impoverishment of the diversity of options put forward at firm level. **This risk is structurally invisible in individual satisfaction data.** It is therefore a forward-looking warning signal: before *agentic AI*[23] potentially fills the collective-attention deficit with real-time monitoring and alert systems, the profession must ensure **the tool remains an amplifier of thought** and not a cognitive funnel. The credibility of tomorrow's consulting will depend on its capacity to **preserve this human cognitive dissonance**, the sole guarantor of genuine strategic value in the face of algorithmic standardisation.

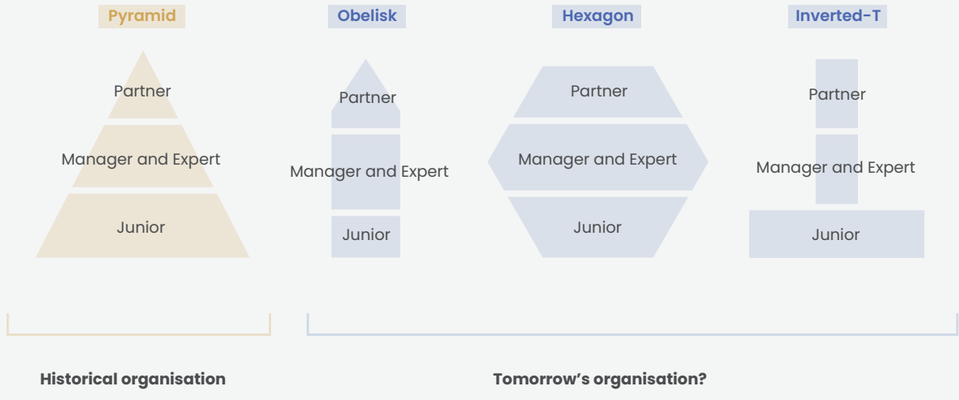
Tension 4 — Restructuring is anticipated; the conditions for its success are absent

Central question: can you change the shape of the firm without changing what makes it work?

4.1 Between the status quo and migration towards an obelisk model, the sector is questioning its organisational model

The analysis of the data collected from our sample of 109 consultants reveals a divide in perceptions of firms' structural future. Asked about the evolution of their organisation over a five-year horizon, **43% of respondents anticipate the emergence of the obelisk model**, as theorised by *Duncan, Anderson and Saviano*[24] in 2025. This model is characterised by **a sharp reduction of the base** traditionally composed of junior analysts in favour of a central body of experts and solution architects. The signal is clear: **the profession is questioning the place of junior generalist profiles.** This shift shows that AI is not merely assisting production; it is redefining the very architecture of the firm by automating the synthesis and research tasks that until now formed the bedrock of junior consultants' learning.

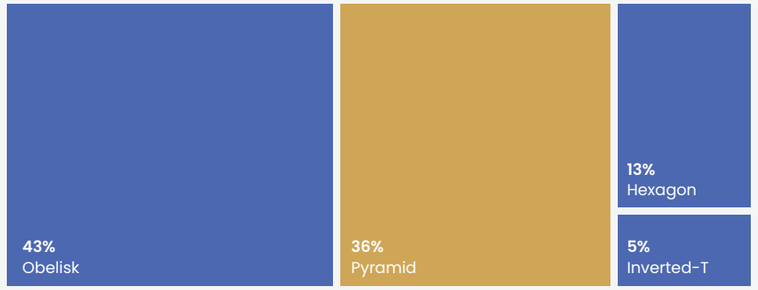
What structure for tomorrow's consulting firms?



Yet resistance or caution remains, since **36% of respondents believe the traditional pyramid will be maintained.** This figure perhaps reflects the reality of certain firms whose business rests on a **strong component of human transformation and co-development with the client**, which constitute a consultant's real added value. "betting that the sheer scale of the transformations clients must undertake will 'compensate' for the use of AI." *Arnaud Gangloff*[25]

The remaining expectations are split between the hexagon model at 13% and the inverted "T" at 5%, attesting to **persistent uncertainty** over the final form the organisational standard for consulting firms will take.

Five-year projection of organisational structures



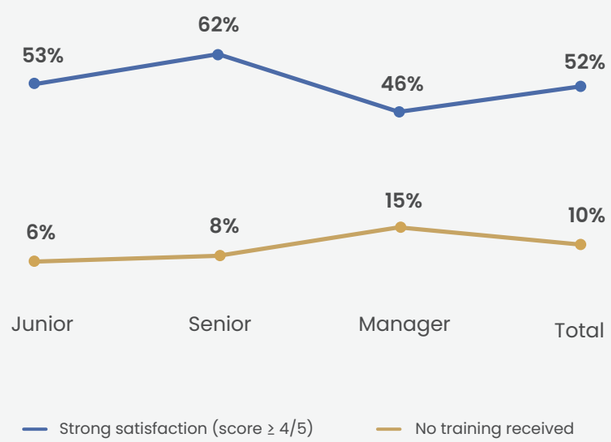
A major analytical caveat must nonetheless be entered regarding the interpretation of current restructurings. The **job cuts observed in 2024 and 2025** within the large global firms are multi-causal. They result, on the one hand, from a necessary post-pandemic correction after the massive hiring of 2020–2022 and, on the other, from a generalised economic slowdown that affected M&A volumes. **Nevertheless, the introduction of AI acts as a catalyst of irreversibility.** While classic economic cycles might, other things being equal, have suggested an eventual rebound in junior hiring, the integration of AI changes the very nature of the demand for human capital. The need is shifting towards technology profiles and AI facilitators.

- **The change in demand for juniors would then be more qualitative, an evolution of the expected skill set, than quantitative.**

If the question arises for junior recruitment, it also arises within firms for consultants already in post. In that regard, our questionnaire examines the **relative effectiveness of the training policies** meant to accompany this change. While only 10% of respondents work in a firm that has put **no AI training in place, the overall satisfaction rate stands at a modest 52%.** This figure reflects deep sectoral and hierarchical disparities. IT consultants report 68% satisfaction, whereas only 38% of strategy consultants judge these programmes positively. More alarming still, **an access deficit is observed among managers.** While only 6% of juniors report having received no training, that figure climbs to 15% among managers. Only 46% of the latter express overall satisfaction, with a very low level of endorsement: just 10% say they are very satisfied, against 35% among senior profiles. **This managerial scepticism constitutes a major obstacle to transforming consulting's business model.**

The hierarchical disconnect is confirmed on the question of how long the content will stay relevant. While 65% of juniors judge that the training received will remain relevant, only 40% of managers share that view. This structural misalignment suggests that **current programmes are perceived as too technical, or disconnected from the challenges of steering engagements and managing the client relationship competences** that are nonetheless central in the obelisk model.

Perceived usefulness of AI training by seniority



Ultimately, **the consulting industry appears to be heading towards a restructuring** that is, for now, endured rather than steered. The emergence of more disruptive offerings with no human consultant involvement for certain standardised tasks illustrates the logical culmination of this trajectory. **Without a deep overhaul of continuing education and a managerial re-engagement in redefining added value, the mutation of consulting's operating model risks translating into a loss rather than a gain of efficiency.**

4.2 The apprenticeship gap: a ticking time bomb

The transition towards the obelisk model, while seemingly anticipated by 43% of the consultants surveyed, conceals a systemic risk that recent academic literature is beginning to document under the term **learning failure, or apprenticeship gap.** The issue suggests that the morphological restructuring of firms could be accompanied by an erosion of fundamental competences. As *Kellogg*[26] and her **collaborators point out in their 2025 work, juniors and seniors share an ignorance of the actual topography of artificial intelligence's jagged frontier.** Neither group today possesses a **reliable map for distinguishing with certainty the tasks where AI excels from those where it induces subtle but critical errors.**

This structural uncertainty pushes junior consultants to develop mitigation tactics. Instead of investing in systemic design or deep understanding of business models, new recruits tend to **fall back on superficial human routines aimed at validating form rather than substance.** The phenomenon is all the more worrying given that the perceived usefulness of AI training drops to 46% among the managers in our sample (see above). This managerial disenchantment attests to a rupture in the transmission of knowledge. If the juniors of 2025 and 2026 are exempted from the laborious analytical tasks that historically constituted the crucible of partners' expertise, the question of the legitimacy and competence of the future directors of the 2030s arises acutely. **The obelisk then risks holding up in appearance while being emptied of its formative substance.**

The danger of this mutation lies in its short-term **structural invisibility.** Immediate performance indicators, buoyed by generative AI's productivity gains, mask a deferred degradation of human capital. Consulting firms, by nature oriented towards operational efficiency, struggle to measure what will only become visible in a decade: **the inability of profiles trained under the automation paradigm to exercise high-level critical thinking.** *Crowston and Bolici*[27] remind us in 2025 that technology is not intrinsically deterministic. The outcome of this tension will depend on organisational design choices. **If AI is conceived solely as a tool of full automation and not as a support for collective intelligence, the apprenticeship-based learning process could disappear.**

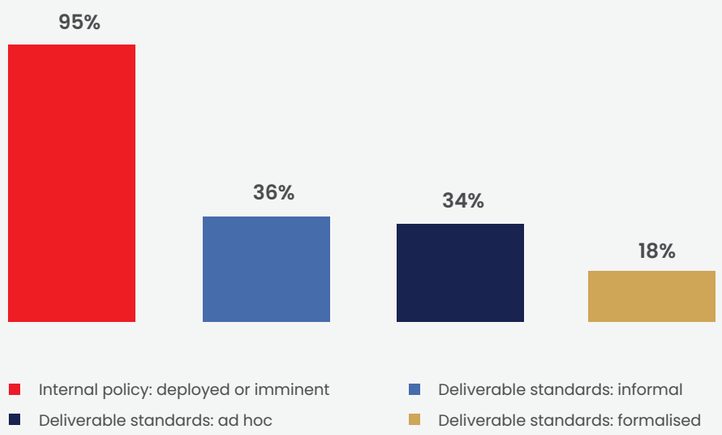
This rupture marks the end of what *Susskind and Susskind*[28] described, as early as 2022, as the **grand social bargain of the liberal professions.** The traditional model in which the junior traded their labour on thankless tasks for privileged access to seniors' expertise is **structurally threatened by technological intermediation.** Our data show that this threat is already latently perceived, notably through the scepticism of the most experienced profiles. The restructuring towards the obelisk would thus not merely be a workforce-reorganisation challenge, but a crisis in the reproduction of consulting's intellectual elites. **Without a reinvention of the learning model that integrates AI without substituting for the cognitive effort required to master the profession, the firm of tomorrow could find itself orphaned of its own expertise.**

4.3 Embryonic governance: insufficient for the present, dangerous for the future

The potential mutation towards the obelisk model and the risk of human-capital erosion are accompanied by a third tension: **the absence of operational governance at team level.**

The results of our study highlight a central paradox: while **95%** of respondents report the existence or implementation of formal policies within their firm, the reality of field practices belies this apparent mastery. Indeed, our study reveals that **written and effectively enforced standards for verifying outputs concern only 18% of consultants.** For the rest, production rests on informal norms (36%) or, more worrying still, on purely ad hoc reactions (34%).

Official policies vs team standards



This gap between the stated rule and actual practice suggests that **governance policy is a bureaucratic mirage** that does not penetrate consulting's basic cell, the project team. This finding corroborates the recommendations of the *Financial Reporting Council of June 2025*[29], which stressed that audit firms should integrate artificial intelligence into their critical processes with a prior **formal assessment** of the impact on delivered quality. Recent events illustrate the real-world consequences of this vacuum. The production of reports containing citations entirely fabricated by artificial intelligence **is not the result of a lack of agility, but indeed of an absence of collective verification standards.**

The governance challenge goes beyond mere compliance to touch the heart of augmented collective intelligence. Coordination between human and machine requires fine-grained regulatory tools that firms struggle to deploy. Our results indicate that **71% of consultants have never experienced digital *nudges***[30], algorithmic prompts designed to guide collaboration. Yet **expectations are real: 38%** of respondents would like automated progress checkpoints, and 26% call for mechanisms prompting the reassignment of tasks according to actual competences. **These coordination mechanisms are essential to avoid cognitive biases and premature consensus**, but their current absence leaves collective intelligence without a compass in the face of the models' computing power.

This governance shortfall already problematic for today's generative AI becomes qualitatively alarming at the dawn of the **agentic-AI** era. While a hallucination produced by a large language model can still be caught by an attentive human review, the autonomous *agent*[31] orchestrates chained decisions and interacts directly with clients' systems. In such an environment, **an initial error propagates virally before any human intervention.** This risk is no longer merely operational; it is legal. The progressive entry into force of the EU AI Act with its strict obligations for general-purpose AI systems since August 2025 and for high-risk systems scheduled for August 2026 places firms in a zone of vulnerability. The governance gap we observe could ultimately become a threat to firms' contractual liability and reputation.

Tension 5 — AI is redefining the core of the profession

Central question: what remains of consulting when AI does what consultants used to do?

5.1 The emerging status of peer: a signal of cognitive reconfiguration

Asked about artificial intelligence's usual role within their teams, the great majority of our 109 respondents still **describe it as a tool.** Nevertheless, a significant proportion of practitioners now place it second or third, as a **"peer"**, with the "manager" option present though marginal. This semantic shift is the weak signal of a deep cognitive reconfiguration already documented by recent research.

The work of *Dell'Acqua*[32] and his co-authors underscores precisely this dynamic: the integration of generative AI acts as a powerful individual cognitive amplifier. When a worker operates inside the tool's "technological frontier", they experience substantial gains in both productivity and deliverable quality.

The data collected from our panel make it possible to identify the configuration of this functional frontier. Detailed analysis of routine tasks reveals marked divides that defy the idea of cascading managerial adoption. Traditionally, the consulting pyramid allocates desk research to junior profiles and entrusts narrative and commercial structuring to the upper grades. **The integration of artificial intelligence produces, within our panel, a notable inversion of this model.**

On desk research, **AI adoption departs from the sector's traditional patterns.** The practice is in fact **driven more by managers (57%)**, who outpace juniors (41%). Conversely, as soon as it comes to structuring thought through the development of a storyline and the production of slides, **the hierarchical dynamic reverses.** The base of the pyramid has broadly integrated the generative tool on this synthesis dimension (59%), while usage declines at the top, concerning only around one third of managers (35%).

This see-saw movement is confirmed on the relational and commercial side. The drafting of emails and proposals is frequently **delegated to algorithms** among juniors and seniors (nearly 60%), contrasting with more restrained use in the managerial stratum (37%). Similar caution is observed on the more technical terrain of analysis and modelling. The core of historical expertise, **this domain remains the least permeable to the use of artificial intelligence**: regular use wins over about one third of seniors (35%) and falls to a limited level (20%) among managers.

Frequency of AI use by activity

	Junior	Senior	Manager
Documentary research & scans	41%	54%	57%
Analysis & modelling	26%	35%	20%
Storylining & slide production	59%	46%	35%
Emails & commercial proposals	59%	58%	37%
Meetings & workshops	41%	31%	33%

This panorama outlines a profession in which AI does not substitute for human work homogeneously, but **triggers a genuine redistribution of roles and legitimacies.**

The junior entrusts the production of the narrative structure to the machine, while the manager delegates documentary synthesis to the algorithm.

This inversion of cognitive production flows inevitably raises the question of the profession's anchoring: if technical analysis and intellectual synthesis slide towards the tool in tandem, what remains of the consultant's added value?

5.2 What AI does not change: the human dimension of Consulting

The redistribution of roles observed above calls for a clear answer as to the nature of the consultant's added value. While analytical production and narrative structuring are increasingly delegated, the literature demonstrates that for a precise set of activities, artificial intelligence is **strictly confined to a peripheral assistant role.** These activities encompass the client relationship, strategic co-development and the building of trust. These theoretical analyses focus precisely on **delineating the dimensions irreducible to automation.** As *Raisch and Krakowski*[33] (Academy of Management Review, 2021) point out, the dynamics of automation and augmentation prove fundamentally inseparable in the organisational space. The two logics co-evolve and create a paradoxical tension that the firm must manage simultaneously to generate complementarities.

This redefinition by subtraction finds a direct echo in the EPOCH analytical framework, formalised by *Roberto Rigobon and Isabella Loaiza-Saa*[34] of the MIT Sloan School of Management in 2025. This model posits **five capabilities** that large language models cannot structurally reproduce: Empathy, Presence, Opinion or Judgement, Creativity and Hope. McKinsey's report[35] offers a macro-economic lens which, applied to the consulting sector, suggests that **30% of a junior consultant's workload is ultimately automatable.** The remaining **70% are non-substitutable**, because they are anchored precisely in transformation support, the collective intelligence drawn on in problem-solving, and the subtlety of the interpersonal relationship.

It should be made clear that this finding is not meant to artificially reassure the profession. It is, on the contrary, an injunction to consciously rearticulate consulting's value proposition around this human core, rather than letting it be defined by default as a mere technological residue. The ultimate tension of this transition lies in this paradox: **artificial intelligence redefines the core of the profession through its limits as much as through its generative capabilities.** Henceforth, the augmented consultant is no longer defined by what they are able to delegate to the machine, but indeed by what they deliberately choose not to entrust to it.

A common objection anticipates that the algorithm will eventually absorb the client-relationship sphere as well. While such substitution is conceivable on certain instrumental dimensions of communication, human engagement in situations of complex organisational uncertainty follows different rules. In these high-stakes engagements, **the consultant's value rests on the capacity to rally stakeholders, grasp the political subtleties specific to the company, formulate critical judgement suited to a unique situation, and generate and sustain trust.** The concept of the jagged technological frontier that irregular, unpredictable geography of AI's capabilities discussed in the introduction is a timely reminder that these **interpersonal and context-reading competences could remain durably out of the algorithms' reach.** Faced with ever-higher client expectations for AI-augmented consulting, the firms' challenge would consist less in automating everything than in **striking the right balance between computing power and irreducible human presence.**

Conclusion — Human judgement, the cardinal competence of augmented Consulting

The analysis of artificial intelligence's integration within consulting firms reveals a complex reality that goes **far beyond the purely technological prism.** The connecting thread linking the five fundamental tensions identified in our study is intimately rooted in **cognitive and organisational dimensions.** Each of these tensions illustrates one facet of this transition. Massive adoption struggles to generate obvious collective value, while technical familiarity paradoxically breeds new vulnerabilities. Likewise, while the machine augments reasoning capacities, it often leaves the team's strategic collective attention lying fallow. The profession's anticipated restructuring is, moreover, taking shape without all the conditions for its success being in place redefining the profession right down to the algorithms' blind spots. Faced with these dynamics, a central question emerges: professionals' capacity to determine, with rigour, how to place their trust in artificial intelligence, at the level of both the individual and the team.

To explore this question, the sector sees the need emerging for **a new competence**, removed from the purely technical skills of tool usage, from client-relationship ease, and from traditional analytical aptitudes. It is **epistemic calibration.** It involves **maintaining constant collective vigilance** over generated results and developing a capacity to **resist algorithmic persuasion**, while avoiding the pitfall of irrational aversion. This analytical prism finds a direct echo in recent research literature. Feedback from our panel of 109 consultants suggests, however, that this **cardinal competence is not yet fully embedded in practice.** The data collected highlight that 44% of respondents score 3 or lower on our survey's calibration scale. In addition, 34% of the professionals surveyed report that governance of these tools within their teams remains purely occasional and ad hoc.

Epistemic calibration:

Resolutely meta-cognitive in nature, this competence consists in knowing how to situate a given task accurately relative to artificial intelligence's jagged technological frontier.

These observations open avenues for reflection at three distinct levels of the consulting ecosystem. For firms, first of all, **training models seem bound to evolve beyond mere interface manipulation.** Learning would benefit from including a continuously updated map of the competence frontier of the various models in use. This individual approach could usefully be accompanied by the establishment of **organisational mechanisms of collective validation**, complementary to the consultant's personal training. For clients, next, the criteria for evaluating consulting work are likely to shift. The **added value of an augmented firm** will probably be measured less by raw productivity than by the **quality of the critical judgement** exercised by teams over algorithmic outputs. In this dynamic, the expectation of transparency on the intellectual and technological processes engaged appears a legitimate evolution for commissioning organisations.

Finally, for management schools, these transformations invite a rethink of certain pedagogical approaches. If epistemic calibration is conceived as a teachable competence, transmitting it requires preparing **professionals able to collaborate intensively with the machine without delegating the act of reasoning** to it. This posture suggests adapting educational models that fully integrate individual and team collaboration with algorithms.

Ultimately, the perceptions we have analysed document an unstable transition period, captured just as agentic artificial intelligence is beginning to hint at new reconfigurations of operational practices. It is precisely in this snapshot of the moment that the documentary value of our barometer lies as well as its acknowledged analytical limit. **The next stage of our work will therefore adjust its focal length.** The aim will be less to document adoption rates that are now high than to **observe** how collective governance is

taking shape around these autonomous agents within engagements, as well as the evolution of practitioners' own perception of the technological frontier. Faced with the scale of these upheavals, **emlyon** business school t**akes full measure of the challenges emerging for its students and alumni.** The pedagogy of the consulting professions delivered both within the Grande Ecole Program and the Master in Strategy and Consulting is evolving profoundly to combine the intangibles of the profession with new competences, identified through close academic research and dialogue with our many partner firms.

The recent creation by emlyon business school of its own technology school, specifically dedicated to artificial intelligence and data science, stands as a response to these challenges. It equips the institution with the means to support the transformation of management and consulting, with the ambition of training profiles capable of reconciling strategic rigour with an enlightened mastery of the new cognitive systems.

To find out more, *click here*

Methodological note

Population and data collection

- N = 109 professional consultants homogeneous population
- Collection period: October 2025 – January 2026
  - Pivotal moment: rollout of second-generation generative AI (GPT-4o, Claude 3.5, Gemini 2.0)
  - OpenAI Frontier Alliance announced in February 2026 our respondents stand at the threshold of agentic AI
- Demographic structure of respondents
  - Tenure: <1 year 8.3% (9) | 1–3 years 22.9% (25) | 3–5 years 23.9% (26) | >5 years 45% (49)
  - Firm type: Management/organisation 51.4% (56) | Digital/IT 25.7% (28) | Strategy 22% (24) | Other 0.9% (1)
  - Size: Micro (<10) 2.8% (3) | SME (10–249) 25.7% (28) | Mid-size (250–4,999) 44.9% (49) | Large (>5,000) 26.6% (29)
  - Countries: international France 98%, Switzerland 1%, Spain 1%

Structuring theoretical frameworks

- Jagged Technological Frontier Dell'Acqua et al. (Organization Science, 2026): the frontier of AI's capabilities is jagged and invisible to practitioners themselves
- Collective intelligence and cohumain Malone (Superminds, 2018); Woolley et al. (Science, 2010); COHUMAIN programme (Gupta, Gonzalez, Woolley, Topics in Cognitive Science, 2025)
- Calibration of algorithmic confidence Gonzalez (Nature Reviews Psychology, 2025); IBLT (Gonzalez, Cognitive Science, 2003)
- Augmentation/substitution paradox Raisch & Krakowski (AMR, 2021); Brynjolfsson (QJE, 2025)

Four cross-cutting analytical caveats

Caveat 1 – Selection bias:

The first limit of our approach lies in a selection bias inherent in the surveyed population. Respondents by nature display a prior interest in artificial intelligence. This attraction logically tends to induce an overestimation of positive perceptions of technological benefits. However, this bias paradoxically strengthens the validity and reach of the warning signals we document throughout this analysis, since these concerns emerge directly within a technophile population.

Caveat 2 – Differential obsolescence of sources:

The second methodological precaution concerns the obsolescence of the sources mobilised. Theoretical frameworks must be rigorously distinguished from empirical performance measures. Conceptual architectures remain valid regardless of the technological model studied, whereas quantitative data from studies predating the emergence of GPT-4o-type models mechanically underestimate the operational reality of 2025 and 2026. Consequently, research published more than two years ago is invoked exclusively for its conceptual contribution and not for its metrics.

Caveat 3 – Multicausality of employment figures:

The third caveat calls for a nuanced reading of the multicausality of the sector's employment figures. The job cuts observed within the large consulting firms between 2024 and 2025 result from a combination of factors. They reflect at once a structural correction following the massive post-pandemic hiring, the effects of a global economic slowdown, and the impact of algorithmic automation. It would therefore be mistaken to attribute to artificial intelligence alone contraction dynamics that partly stem from cyclical adjustments.

Caveat 4 – Acknowledged temporal limit:

Finally, **the fourth consideration** is an acknowledged temporal limit. Our data capture a precise inflection point, situated just before agentic artificial intelligence reconfigures professional practices once again. This snapshot of a profession at the threshold of a new technological tipping point constitutes both the main documentary value of our survey and its inherent analytical limit.

Part II: Lyon, France's second consulting stronghold

1 – Overview of the Lyon consulting ecosystem: nearly 300 players identified

After a first chapter devoted to AI and to how it is reshaping consulting practices, this barometer returns to the field where these developments take concrete form. In Lyon, the consulting ecosystem stands out for its density, maturity and diversity, in a market that is both dynamic and highly fragmented. Technology, digital and engineering now hold a defining place there, to the point of feeding a growing share of transformation engagements. AI, for its part, is establishing itself as a differentiator, but at uneven speeds across segments. Putting this landscape in perspective means giving our students reference points to understand the market and find their place in it, while affirming **emlyon**'s place at the heart of this momentum.

Axis 1 – A dense, mature and highly fragmented ecosystem

With **nearly 300 consulting players** identified in our barometer, Lyon asserts itself as France's second consulting marketplace, behind Paris. The local market is characterised by a high density of players and a high level of maturity, in a context of heightened competition. Differentiation thus becomes a central challenge for firms, in an environment marked by a notable rise in client expectations and an increasingly selective use of specific expertise.

Axis 2 – A significant territorial footprint for the large audit and consulting groups

The Lyon consulting and audit market is characterised by the identification of some **twenty groups**. Among them, the Big Four and their main competitors hold a dominant position. The large audit groups retain a defining position on the Lyon market and remain leading players, notably on engagements with a strong strategic, cross-functional or international dimension.

Axis 3 – A Lyon specificity: the weight of IT services companies (ESN) and hybrid IT & Consulting players

The Lyon ecosystem stands out for the richness and diversity of its fabric of IT-services firms (ESN) and hybrid players, positioned at the interface of consulting, technology integration and operational delivery. Our census highlights **more than fifty ESN present in the region**, plus some **forty firms specialised in digital transformation.** Together they attest to the strong density and maturity of the local ecosystem. This configuration is a defining feature of the region, closely linked to its industrial and technological DNA.

Axis 4 – The rise of "pure player" firms and expert niches

We observe the rise of specialised firms, generally more modest in size but strongly identified with their field of expertise. The most represented specialisations concern, in particular, **human resources, with nearly 30 players listed; CSR and impact activities**, which also gather around **thirty structures; and innovation and engineering, with 23 players identified.** Supply-chain and industry expertise round out the list, with some **twenty specialised firms recorded.**

Axis 5 – Consulting as a lever of transformation rather than "pure" strategy

In Lyon, consulting falls mostly within a logic of operational, technological and organisational transformation. Engagements relate more to supporting transformations than to upstream "pure" strategy, reflecting a pragmatic, results-oriented approach. This orientation is reflected in the market's structure: only about **fifteen firms specialised in pure strategy** were identified, most often of moderate size, working on targeted briefs or specific areas of expertise.

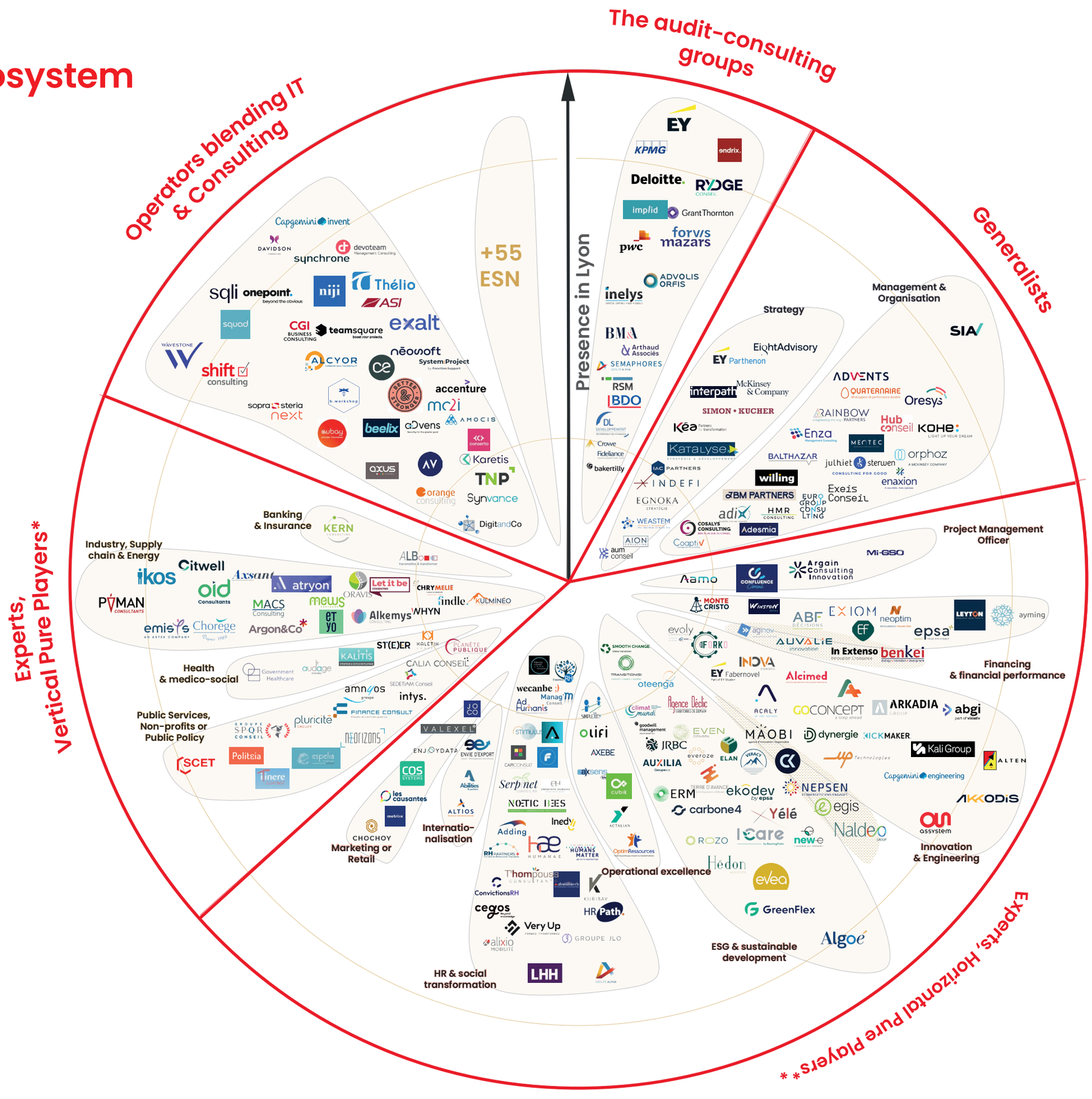
Axis 6 – A growing hybridisation of consulting models

The Lyon consulting market is marked by a growing hybridisation of offerings. The boundaries between strategy, operations, IT and functional expertise tend to blur, in favour of combined models. **This porosity is not an analytical bias but a faithful reflection of the market's evolution and expectations.**

Consulting Barometer

The Lyon ecosystem

Consulting players



Legend:
(*) by sector of expertise
(**) by domain of expertise

Methodological note

This radar of the Lyon consulting ecosystem was built from a census of **294 consulting players**, ESN included, with a presence in Lyon or its near periphery.

The approach rests on a **deliberately non-exhaustive list**, designed to be representative of the diversity of positionings and of the local market's structure. The goal is not to produce a complete inventory, but to offer an illuminating reading of the ecosystem's main dynamics and balances.

Identification of firms drew notably on:

- The INSEE directory, used as a starting point for identifying firms in the sector;
- And complementary research (websites, public communications) enabling their positioning and expertise to be characterised.

Headcount data were estimated from information available on LinkedIn, since headcounts declared to INSEE are not always sufficiently up to date or precise for this purpose.

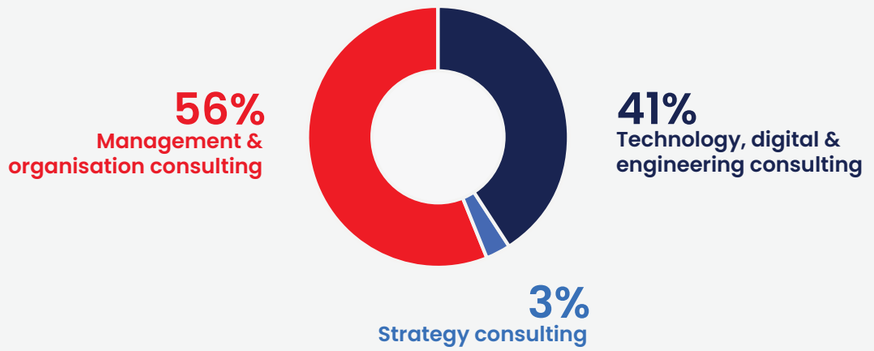
The categorisation of the players shown in the radar follows a primary-activity logic. Many firms in fact operate across several fields of expertise; the positioning retained primarily reflects how they present themselves in their communication materials (offers highlighted, market discourse, claimed expertise). The boundaries between categories are therefore, by nature, porous that porosity being in itself a key lesson on the evolution of consulting models.

In the absence of reliable, homogeneous data sources, this approach can lead to categorisation errors. A first version of this radar was released online and gathered numerous public comments, which have been incorporated into this new version.

Study period: April to December 2025

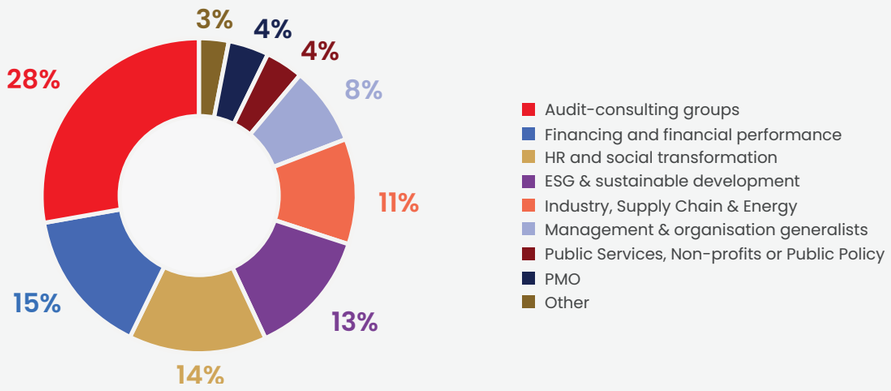
2 – Consulting headcount in Lyon dominated by management and tech

Breakdown of Lyon consultants by major consulting domain



In Lyon, **technology, digital and engineering consulting accounts**, by our estimates, for **41%** of consultants, confirming its rise and its now central role in the market. Driven by digital-transformation, IT-architecture and industrial-innovation projects, this segment is **progressively establishing itself alongside management and organisation consulting (56%)**, whose engagements increasingly carry a strong technological dimension. **Strategy consulting**, though a minority **(3% of consultants)**, retains a high-value-added positioning on targeted interventions. Overall, the picture reflects a market evolving towards more operational, better-equipped, transformation-oriented consulting.

Breakdown of Lyon management & organisation consultants



A growing specialisation of expertise

The breakdown by domain of management and organisation firms confirms the market's transformation. The **audit-consulting groups (28%)** still shape the bulk of the offering, while **expertise in finance & performance, HR & social transformation and ESG & sustainable development** reflects the emergence of new regulatory and societal needs. The weight of **industry**, supply chain and energy illustrates, for its part, Lyon's regional roots.

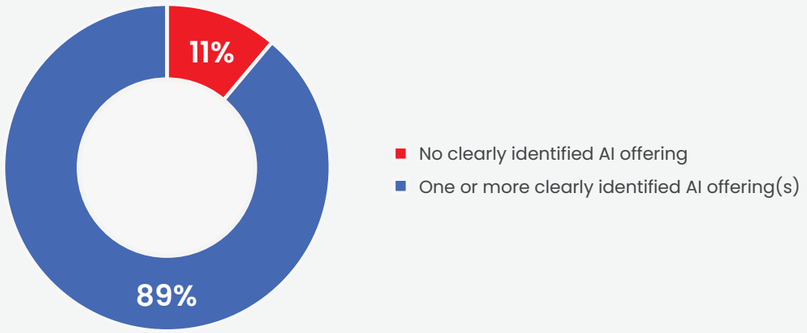
The percentages correspond to the **share of consultants in each category**, not to the players' total economic weight. The assumptions used are as follows: around **40% of audit and consulting players' headcount is counted as consultants, around 15% for engineering and innovation consulting, and around 90% for the other "pure" consulting firms. For the ESN, 10% of headcount was treated as upstream consulting (transformation, business analysis/AMOA, strategy)**. These estimates draw on Syntec Conseil 2024–2025 data, Opiiec studies, Numeum publications and the annual reports of the sector's main players.

3 – AI: a differentiating factor still unevenly structured across the consulting market

Zoom on:

- **89%** of the digital-transformation consulting firms in Lyon explicitly advertise one or more AI offerings (based on the Lyon players identified) ;
- Conversely, **only one third** of consulting firms in Public Services, Non-profits and Public Policy openly offer AI services ;
- And only **1 HR and social-transformation consulting firm** out of 26 clearly presents an AI offering.

AI positioning of digital-transformation firms and ESN



The analysis of the **AI positioning of the 294 consulting players** in Lyon highlights strong contrasts across player families. The ESN appear the most advanced, with 47 players out of 53 displaying one or more clearly identified AI offerings, confirming AI's now central place in their value proposition. Digital-transformation consulting firms also show a high level of maturity (32 out of 36), while the audit-consulting groups sit in an intermediate dynamic, with 14 players out of 19 having formalised AI offerings.

89% **of ESN and digital-transformation firms** offer a clearly identified AI offering

Conversely, **several segments remain markedly less structured** on these issues. HR and social-transformation firms (1 out of 27), ESG and sustainable-development players (5 out of 30), and those operating in public services and public policy still show weak formalisation of AI in their offering. Strategy consulting firms (9 out of 13) and innovation and engineering firms (13 out of 22) occupy an intermediate position, reflecting progressive but still uneven uptake. Overall, these results illustrate a diffusion of AI driven first by technology players, ahead of a more gradual rise in maturity among firms with a functional or sectoral focus.

30% **of players with a functional or sectoral focus have structured an AI offering integrated into their model**

Part III: Cross-perspectives – AI, Consulting and corporate transformation: the expertise of emlyon professors

Having explored AI as a force of recomposition, then observed the Lyon consulting ecosystem in its density and its fault lines, this third chapter opens another register: **that of stepping back and taking an expert view.** Through the contributions of **emlyon** professors, the point is less to follow a trend than to understand what is transforming in depth: professions, organisations, ways of deciding, steering, persuading and, more broadly, the way strategy is defined and driven. AI appears here in its rightful place: not as an isolated subject, but as a catalyst that accelerates movements already at work in management, consulting and even within higher-education institutions. This chapter thus offers cross-readings between research and practice to shed light on the tensions of the moment, the new levers of transformation, and the renewed demands of the consultant's profession.

1 – AI at the heart of our professions: from adoption to operational mastery

Bawack, R. E., Bawack, E. B., & Seny Kan, K. A. (2026). *Artificial Intelligence in Sustainable Finance and Accounting: a Bibliometric Analysis and Future Research Agenda.* Information Systems Frontiers.

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Chen, Q., Yin, C., & Gong, Y. (2025). *Would an AI chatbot persuade you: An empirical answer from the elaboration likelihood model.* Information Technology and People, 38(2), 937–962.

Ding, A. W., & LI, S. (2025). *Beyond the Big Data Mindset: An Executive's Guide to Cultivating AI as Talent.* California Management Review Insights, 1–11.

- What if the AI challenge were no longer technological, but strategic? This article invites leaders to consider AI as a genuine talent to be developed, on a par with human competences, to create value sustainably.

Ding, A. W., & Hu, P. B. (2026). *When AI becomes your coworker: ending the tool-mindset and building a symbiotic partnership.* Knowledge@emlyon.

- Working with AI, rather than using it. Ding and Hu propose an essential shift of perspective: thinking of AI as a coworker, capable of enriching decisions, learning and organisational performance.

Access the article free of charge by scanning the QR code!

Shalpegin, T., Browning, T. R., Kumar, A., Shang, G., Thatcher, J., Fransoo, J. C., Holweg, M., & Lawson, B. (2025). *Generative AI and Empirical Research Methods in Operations Management.* Journal of Operations Management, 71(5), 578–587.

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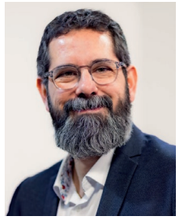
2 – Reinventing higher education: when AI becomes the catalyst of knowledge



Interview

Benoit LOEILLET

Associate professor – Data science / Head of departments / Data & AI Speaker – **emlyon** business school

Given the rise of Artificial Intelligence issues in the consulting sector, what place does this subject hold in the pedagogy of emlyon business school?

Building on the core courses of the various programmes, the ODAI department (Operations, Data and Artificial Intelligence), in collaboration with the Faculty's other departments, offers students of the Grande Ecole Program and of various programmes the opportunity to develop both technical and reflexive competences around AI, as well as the technologies, tools and platforms associated with it. The objective is to give them the means to make full use of these, while being able to identify their limits of application and use. The approach is built around three levels of progression: from conceptual understanding of existing models and their impacts, through to mastery of the fundamental technical skills required to design and deploy AI systems.

What are the main themes on which emlyon business school researchers are currently working in Artificial Intelligence?

emlyon business school's professor-researchers are pursuing two major complementary lines of work. On one side, the use of AI models in the service of varied application domains: supply chain, operations management, optimisation of decision-making techniques, marketing, finance, as well as health and medical-data analysis. On the other, the exploration of how organisations and professions take up and implement such systems a dimension at once human, managerial and strategic.

How, in your view, can we encourage closer ties between the academic and professional spheres, given a subject that is evolving extremely fast?

By nature, these two spheres do not operate on the same timescales. Yet their cross-fertilisation is not only desirable but necessary. It can take concrete form in several ways: through regular contributions by practitioners within programmes and courses; through real-world scenarios proposed by practitioners in the field, allowing students to grasp the actual stakes of implementation in varied contexts; and through joint projects that reveal the diversity of realities (successes as much as failures, which are often numerous) and make it possible to break free of the technological hype and develop more nuanced judgement.

What skills must today's students develop to be ready for a working world shaped by AI?

Several skills strike me as decisive. The capacity to analyse and solve problems, first of all, combined with the development of a systematic critical eye on tools and results. Knowing how to identify and precisely define business needs and problems is a major asset. That also means knowing how to question those needs, as well as the approaches adopted to address them. On the technical side, mastery of the fundamentals of the analytical approach and of the mathematical bases underpinning it remains indispensable so as not to stay on the surface of how these tools are used.

What advice would you give consultants who want to keep up with or get ahead of technological and managerial developments in AI?

Models are certainly evolving very fast, as are the technologies associated with them. Understanding them and making them one's own is, in my view, indispensable for working out how to get the best from them, while being able to cast a critical eye on the results obtained or generated. More fundamentally, stay in command of understanding the need and how best to address it, without getting swept up in technological solutionism. Interpersonal and situational intelligence will be more than decisive.

- Billouard-Fuentes, D. (2025). *Intelligence artificielle dans l'enseignement supérieur : avancées et pratiques.* Knowledge@emlyon.
  - AI is already reshaping ways of learning, teaching and assessing in higher education. This piece offers a panorama of emerging campus practices and provides essential reference points for understanding, positioning oneself and acting in the face of these transformations.

  Access the article free of charge by scanning the QR code!

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- Giolito, V., & Golsorkhi, D. (2025). *"We made a mistake": How top executives dialectically narrate strategic errors in situations of strategic change.* Strategic Organization, 23(3), 453–479.
  - Acknowledging one's strategic errors can become a lever of transformation. This article shows how executives use the narrative of their failures not as an admission of weakness, but as a powerful tool to give meaning to change, preserve their legitimacy and relaunch collective action.

- Gond, J.-P., Carton, G., & Millo, Y. (2025). *Strategy as a Performative Practice: A Self-Referential, Knowledge-Based Perspective.* In Cambridge Handbook of Strategy as Practice (pp. 290–310).

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4 – Perspectives on the evolution of consulting professions

Interview

Dimitri RODIONOV
PhD Student, **emlyon** business school Dimitri is a doctoral student in management science at **emlyon** business school and Université Lyon 3. His research focuses on consultant engagement and the socialisation of skilled migrant workers. He has more than ten years' experience in management and performance consulting.

Your research focuses on the value consulting firms create for their clients. To what extent is Artificial Intelligence changing the game?

The use of AI has two major consequences for consulting firms. First, it allows consultants to identify relevant information faster, analyse data more efficiently, automate routine tasks and free up time for work of higher intellectual value. At the same time, AI carries risks, notably those linked to hallucinations and to excessive trust in results, particularly among recent graduates. With rigorous model selection, integration with other systems and, above all, appropriate training of consultants, the use of AI improves the efficiency and performance of consulting engagements to the benefit of clients.

Do you believe there is a durable space of value creation specific to consulting that cannot be replicated by Artificial Intelligence?

Yes, absolutely. AI is a major new tool, whose impact I would liken to the appearance of Excel forty years ago. It can produce remarkable results, but only in the hands of a competent expert. In my view, the goal of every consultant is precisely to become that type of expert, complementing their existing know-how with the analytical capabilities offered by AI. According to the academic literature, consultants are perceived by their clients as trusted advisers; to preserve that status, they must be at the forefront of the adoption and considered use of new tools, including artificial intelligence.

What advice would you give today to students or junior consultants to make the most of the potential offered by AI?

Train continuously. AI is evolving so fast that the courses offered by your school will quickly be outpaced by leading-edge practice. While you can rely on the foundations learned in class, it is essential to experiment and use AI to solve your everyday problems, academic as well as personal. For example, you can set up custom instructions in your favourite AI model, then feed it your notes and readings before asking it to extract the data needed to solve a business case. More advanced users can integrate a coding AI into their note-taking software to use it as a personal assistant. However, I strongly advise against simply copy-pasting generated solutions: just like Excel, you must use AI with discernment. Always check the sources and the accuracy of the answers obtained.

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Appendix

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