



Management Consultancies Association

1956 - 2016

The story so far, celebrating 60 years of the MCA

Chief Executive's Preface

The MCA's 60th anniversary story mirrors that of our industry. In just the past decade, we have experienced growth, transformation and challenging times. We have diversified, developed new services, become more flexible and, yet, more strategic. And, like consulting itself, we now feel that we are on the cusp of a further period of fundamental, exciting and, perhaps, unknowable change.

This is as it should be. The MCA is the sum and servant of our member firms. And the consulting industry has travelled a long way in a short time.

Five recent trends stand out.

1. There is more diversity - for clients

Clients have never enjoyed such an array of choice and capability in consulting. While there is consolidation, there is also continuous re-invention. The UK benefits from a particularly vibrant and competitive consulting market, with specialist and challenger firms constantly taking up the baton. At the same time, global players have developed new services and business models as client needs have changed.

2. There is more diversity - within firms.

There is a reason why the cry for diversity is so prevalent in our discourse. It is commercially - as well as socially - essential.

While there is ever more to do, consulting has certainly understood the need to change itself. New generations of consultants would, in any case, demand new ways of working, particularly in a digital age. Business leaders increasingly understand that successful consulting teams bring together a wide diversity of perspectives, views, skills and influences.

3. We are all global now

Under pressure at home following the financial crisis, the MCA's members looked for new markets overseas. Ours is now a global industry, impatient with barriers to trade, and with an international workforce. Consulting travels fast, and puts down roots with ease. The UK has many advantages in this global marketplace. We use them to great effect.

4. We are all digital now

The explosion of digital consulting in recent years reflects the value that management consulting brings to UK business. It is consulting that builds the bridges between innovation in technology and the challenges facing leaders, helping clients to navigate and exploit disruption in sectors as diverse as retail, government, infrastructure and financial services.



Consulting has helped put the UK at the forefront of both digital and business modernisation. We are in new economic times

5. It's value, stupid!

As consulting matures, it focuses on the outcomes it can influence, and the difference that it makes. Clients see this in terms of the value that they want; consultancies work ever harder to ensure the quality of their advice and services. Increasingly we see new ways of doing business – and contracting for results – that create real partnership between consultant and client.

The MCA has moved with these times. The MCA Awards are the showcase for quality. Our Think Tank combines expert analysis of trends and data in consulting with authoritative insight on policy and business. The Consultancy Buyers Forum promotes dialogue and raises the ambitions of both clients and consultancies. Our lively Young MCA network gives us great confidence in consulting's future.

And, now, as we celebrate 60 years, we are also launching *Consulting Excellence*, heralding our members' commitment to the highest standards of ethical behaviour, client service and value, and professional development.

Anniversaries are a moment for both reflection and gratitude. We relish how far we have travelled. We thank everyone who has helped us on the way.

I am particularly grateful to all those who have served as MCA President, or on our Board and Council, and those who have worked over the years as members of the staff team. They have brought us change, as well as continuity. They deserve our thanks.

Alan Leaman

Chief Executive, MCA

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Howard Tollit

MCA President (2016 - present)

Like many leaders in our industry, MCA President Howard Tollit didn't initially plan a career in consulting. "I was working as an architect. But my first degree was in environmental science, and I'd also been involved in waste management, a real growth industry in the 1980s. But those jobs felt like they'd run their course for me. In the early 1990s, following an MBA, I spotted an opportunity to join a new team in a prestigious firm focused on environmental business consulting. It seemed like a perfect fit. And yes, it was my best career move. I've been in consulting ever since."

Consulting gave Howard first-hand exposure to economic success stories, as well as challenges. "My worst experience came quickly. Shortly after I entered the industry, the economy dipped into recession. Times were tough. People lost their jobs. But that was vital learning for me, specifically about reinvention and relevance. The difficulties we faced related directly to difficulties affecting clients. Our success depended on being able to provide clients with value – in good times and bad. It still does."

The biggest consulting changes Howard has witnessed concern people and recruitment. "Like many in my generation, I almost fell into consulting. Now, as the profession expands, we need to project an image of consulting as a vocation in its own right and up the ante on graduate recruitment. And that's happening. We're competing strongly with the 'traditional' professions such as law and accountancy, getting fantastic people straight from university."

Yet Howard suggests that a balance needs to be struck. "Because I'd done other things and worked 'clientside' I spoke the language of business and could adapt. We're recruiting people for their fresh, unprejudiced perspectives and deep skills in new technologies. But it's important we also foster real adaptability in them. The MCA's recent survey of young consultants showed that young recruits crave training in 'soft skills': sales, presentation and management. That's a rallying cry to our industry. We need to respond and equip our recruits. After all, the technologies they have such mastery of now won't always be leading edge. They'll need to acquire new skills, not least in core consulting, and add these extra arrows to their quiver"



Howard sees the MCA as a major player on these matters. "The MCA has a critical role to play as consulting's intellect and conscience. The Think Tank provides real insights into what's going on in our industry and where change is happening. But the Association also helps us balance that change with continuity: how we remain true to consulting's core principles and capabilities, while evolving to meet increasingly diverse client needs. Consulting Excellence will become the most visible expression of that conscience. It will help us navigate in the future. As technology becomes increasingly important, it's essential we stay focused on that key consulting ingredient. People. Future recruits will be different to me. But I want them to have the rich and varied career I've enjoyed. I've loved (almost!) every minute of my 25 years in consulting and have been privileged to work on fascinating projects, alongside great people."

"The MCA has a critical role to play as consulting's intellect and conscience."

Consulting: 60 years of change

A week is a long time in politics. 60 years is an eternity in business. As the MCA embarks on its seventh decade at the heart of consulting, it is exhilarating to reflect on changes since the Association was founded in 1956, the year of Suez, Jim Laker's 19 wickets in a Test Match, Soviet tanks in Budapest, Elvis's first charts entry, IBM's invention of the hard drive, the inaugural Eurovision Song Contest, Australia's first TV broadcasts, and Rocky Marciano's unbeaten retirement.

Management consulting is a young industry. The first consultancies appeared towards the end of the 19th Century. They provided independent strategic advice and technical analysis. But consulting really got going in the 1940s and 50s, especially in the US. Robert McNamara, for example, who was later John F Kennedy's Secretary of Defense, applied his skills as a Price Waterhouse accountant analysing Allied bomber logistics in the Second World War. He then deployed similar techniques at Ford, improving production efficiency and vehicle safety, by examining accident and complaint data, and applying conclusions to the manufacturing process.

By the 50s, consulting also had a sufficiently developed presence and identity in the UK to launch a trade association. But the industry remained small. Four firms with combined income of £4m founded the MCA. Over the next ten years, Annual Reports show how the Association and consulting grew, through strategic advice and work on efficiency and 'overhead reduction', for a corporatist Britain in decline, hoping the 'White Heat' of technological revolution would change its fortunes. The MCA doubled in size by the time Martin Luther King had his dream, and nearly doubled again as Geoff Hurst scored his hat trick against West Germany.

Through the economically challenging 1970s, the Association slowly expanded. Annual Reports at this time reflect on the 'unreliability' and 'uncompetitiveness' of British exports. We can imagine member firms contributing knowledgeably to debates about the UK's poor productivity, industrial relations and status as 'the sick man of Europe'. Then our industry took off in the 1980s. MCA firms were at the heart of the UK's post-industrial reinvention. Consulting became more intellectually systematic. Disciplines such as Lean. Six Sigma. and Total Quality Management emerged. Consultants helped tackle industrial over-manning. They provided pioneering support in the newly opened-up public sector. And they were integral to new and innovative service industries in design, media, telecoms and finance. By the fall of the Berlin Wall, the MCA had 31 members and combined revenues of over £600m. As Tony Blair became Labour leader in 1994, member income topped £1bn.

Growth continued in the new millennium. Consulting had become increasingly important to British industry and public service reform. MCA members secured multiple billions in revenue and expanded their workforces. Major recruitment drives added new cohorts. Graduates whose first serious



Paul Connolly
MCA Think Tank Director

job was in consulting joined the seasoned mature hires with backgrounds in industry who hitherto largely dominated the industry. The Young MCA was formed in response.

That growth stemmed in part from a change of emphasis: delivery. As one past President put it, "Now consultants don't just advise on how to cut the grass."

Pivoting between advice and delivery has always been a feature of consulting. Around the time the industry came into being, Arthur Conan Doyle was writing his Sherlock Holmes stories. Holmes styles himself a 'consulting detective' and his adversary Moriarty 'that great consultant in crime'. Holmes advises the Met. Moriarty integrates the crime world unseen. Yet both frequently get their hands dirty. That Conan Doyle used 'consultant' in this way suggests the common understanding was always of something on the cusp of advisory and delivery.

So the issue is one of degree. In the 2000s, business and public services wanted results, but couldn't always secure them alone. So, consultants started to manage large-scale programmes, from systems integrations to transformation initiatives. Programme management became the largest consulting service line. This shift also led to the first emergence of new commercials: risk and reward, managed services models. But there were downsides. The emphasis on expert delivery capabilities sometimes produced price pressures and commoditisation. Large, poorly procured, public-sector delivery programmes looked like manpower substitution and attracted the attention of auditors – especially as austerity bared its teeth in the latter part of the decade.

Indeed, after the Financial Crisis of 2008, consulting faced challenges in common with the rest of industry. However, MCA member firms' responses were mature. Certainly revenues were hit. But schooled by mini-downturns (the dotcom bubble and the Enron aftermath, which saw very significant consulting restructure) our firms were often keen to ride out the storm, retain staff, and hit the ground running when growth returned.

The industry recovered and retooled. First it helped reform the financial services sector. Now, after a period of substantial cuts, it is rightly returning to a public sector facing real challenges. Spend is not on the previous scale.

But consultants are providing new, innovative services, helping departments, agencies and local authorities get more for less. Most significantly, consulting is supporting business in their efforts to grow during a recovery at once characterised by real opportunity but also daunting change. Consulting is growing by helping others grow.

That growth is more sustainable than ever, not least because it is genuine consulting growth. Since 2013, MCA member fee income has risen by over 8% annually. Yet the current aggregate income appears lower than before the Crisis. That may be attributable in part to lower public spending. It may also relate to membership churn. But in truth it mostly stems from changing metrics. The MCA is increasingly rigorous in collecting fee income data. We exclude marginal, uncertain or irrelevant material from our calculations. Indeed, some of what was counted as consulting income in 2008 would not now be considered consulting at all, either by the MCA executive or member firms themselves. The latter are keen to distinguish themselves from manpower substitution, contractors and interims, and to celebrate consulting as well managed expert teams delivering insight and value.

Consulting is also changing, by helping others change. Client problems are more complex than ever. This drives partnerships between firms. Alliances have always been part of consulting. But now consultants operate in advisory ecosystems, flexible communities of capability that combine to wrap themselves round clients' needs and deliver quality outcomes.

The most spectacular change of recent times is, of course, digital. Digital is now a mainstay of consulting, the largest consulting service line by far. It is reinventing how consulting is done and what it is about. In the three years since it first topped the service line rankings – or, to put it another way, across one twentieth of the MCA's history – digital consulting has already changed dramatically. Providing consulting support for clients in their use of customer-facing digital capabilities (apps, social media, marketing) was a predominant theme in member feedback on 2013. Another was providing 'translation' services. Consultants are steeped in technology and speak the language of business. They can explain the implications of novel technologies in terms that matter to business leaders: recruitment strategies, investments, the bottom line.

Those themes have persisted since. But in 2014 a new emphasis emerged. Consultants argued that businesses needed to digitise their entire enterprise to get value. Legacy systems should be discontinued. Supply chains needed digitisation. And to get the most from staff, firms had to provide them with the best digital tools. Without thoroughgoing digitisation, customer-facing digital capabilities won't prove agile. Again, this has remained a major theme since.

During 2014, but even more markedly in 2015, consulting

firms also suggested that by embedding digital within their own consulting praxis, they could create efficiency dividends to share with clients. Cloud-based solutions, proprietary digital assets in analytics, or the artful deployment of open source materials could furnish low-cost, scaleable solutions for clients. So too could cutting-edge innovations. Experts interviewed about the consulting landscape in 2015 mentioned consulting's use of automated analytics that reduce the human effort needed to marshal data, as well as cognitive learning and artificial intelligence.

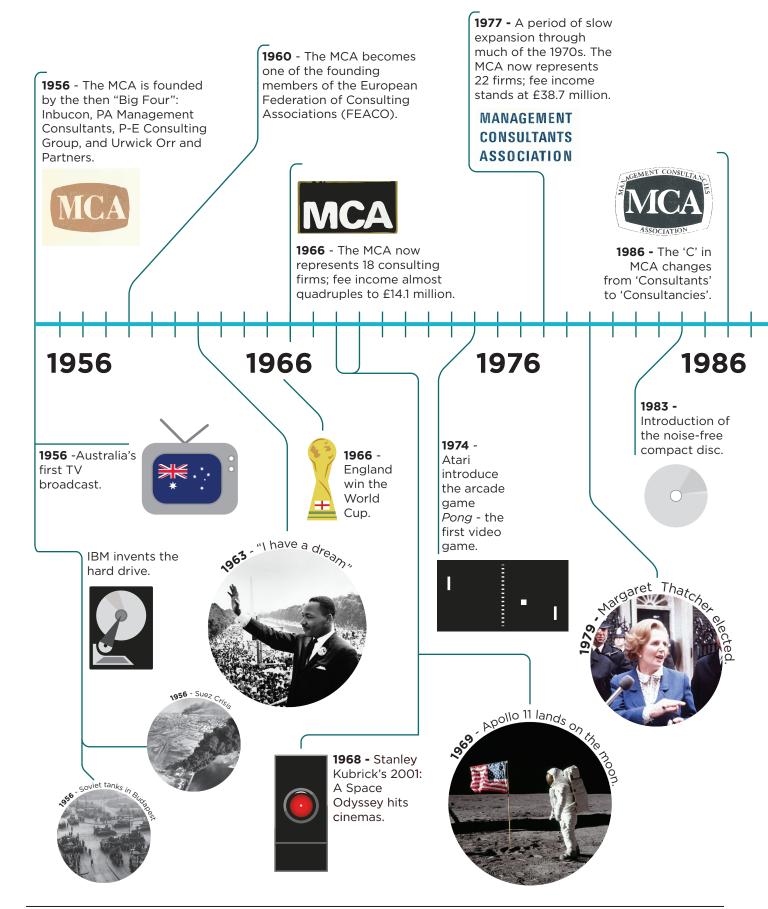
This is radical stuff with radical implications. It affects investment, organisation and recruitment strategies. The latter are changing. Business leaders now consciously recruit people different from themselves, including creatively 'disruptive' digital natives. This is driving up both graduate intake, and increasingly the recruitment of non-graduates, school leavers and apprentices.

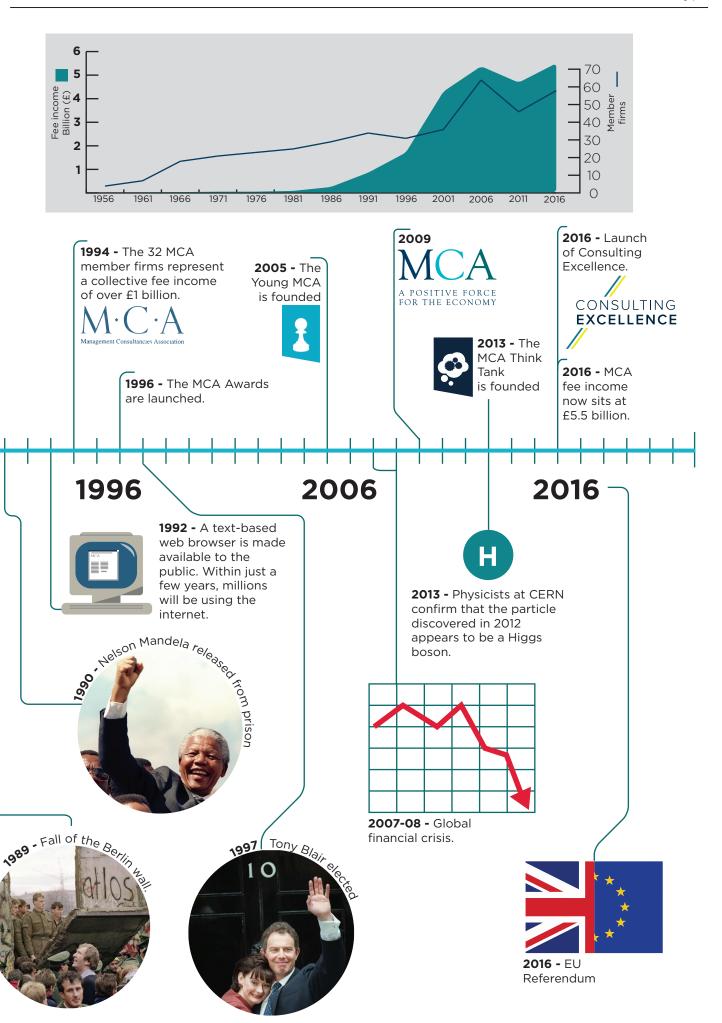
Firms must respond to these changes individually. But collectively through the MCA they are taking stock. Consulting has always been characterised by continuity - the trusted adviser providing high value insights - and change the way insights and value are generated. The industry has always been at the heart of change, helping clients transform, adopting new consulting practice to stay relevant. Digital may be no different. However, digital disruption seems more intense, faster and less predicable. And some wider economic commentary highlights other, more challenging questions, especially around AI and automation. Will the shift in value creation from human to machine agency soon reach a tipping point? If so, will we see the radical disintermediation of consulting? Will it become largely computerised, with only limited human involvement in programming and maintenance? Will the MCA's 120th birthday party be a gathering of cyborgs, androids and automated learning capabilities?

For this publication, we asked MCA Past Presidents and a former Young MCA council member about their consulting experiences and vision of the future. All suggested that while consulting would be changed by technology, people would remain central to it. Key here will be the MCA's 60th birthday present to the industry: *Consulting Excellence*. This scheme, launched today, enshrines the traditional principles of independent, high-quality, high-value, transformational advice services, but recognises and embraces change. It marks a point of departure. It reaffirms the purpose of the MCA and the value of consulting, and articulates them to the world. Today, consulting moves on from being a young industry and passes into maturity. Today consulting grows up and becomes a profession, even a true vocation.

So here's to 2076. Then, we will gather again to toast absent friends, human and droid alike, look back on the reign of King William V, recall England's six World Cup wins, tell that old joke about President Will Smith, wonder how Tom Hiddleston and Taylor Swift lasted for so long, marvel that The Rolling Stones are still touring, albeit with the aid of cryogenics, and celebrate 60 years of *Consulting Excellence*.

60 Years of the MCA: Milestones through History







Jan Gower

MCA President (2009 - 2010), MCA Awards judge, and
Partner at Medway Consulting

On her first day as a consultant, former MCA President Jan Gower was in at the deep end. "I arrived at grand, intimidating offices in St James's, surrounded by 30 very bright, confident people, who had hired me as an ergonomics specialist. And I was immediately sold to a big client as a marketing expert! Actually it was a great experience. I learned to adapt. The client basically needed someone to listen to them. I found I could help."

Jan says the working environment was very different, "People smoked in the office. There were no mobile phones, no shared diary system. And leadership teams were very male. There were no women's toilets near some clients' boardrooms, especially in the military. As a professional woman I was often a novelty. Some clients liked that, especially as I brought a practical, 'can-do' attitude to work. On one occasion I literally dealt with a client's mess - by taking a Hoover with me!" Jan says there are contemporary lessons in that experience. "I've worked a lot on diversity. The changes now happening in consulting are really heartening. But what drives them is a mix of principle - the desire to do the right thing - and necessity. New recruits insist on a working environment that reflects modern Britain. And diverse businesses are better businesses. When I was a workplace minority, I had skills and perspectives that weren't just nice to have. They were genuinely useful. The penny is now dropping and enlightened self-interest is diversifying workplaces."

That enlightened necessity, Jan suggests, underpins the MCA. "I was the Austerity President. My term of office followed the 2008 Financial Crisis. Firms were struggling. Some couldn't afford the membership subs. But those who stuck with the MCA did so because they realised that surviving a crisis is easier if you cooperate. That's created a legacy. Collaboration, on client assignments or big themes affecting consulting, is an accepted feature of a mature and growing industry." Jan says consulting's maturity entails scale. "I worked for the forerunner of a current Big 4 firm in the 1980s. It employed just 250 consultants. Our industry has expanded enormously." But the most obvious change in consulting is technology. "When I started out, I felt very modern sitting at my Wang Word Processor! Now consulting is at the cutting edge of digital. That's brilliant. But as consultants use new digital

assets, automation and AI to create value for clients, it's important we don't forget that consulting is principally about great people providing great advice."

The human dimension is important even in the very worst consulting experiences. "Early in my career, I was in a team and the client really bawled at us – in public. It wasn't pleasant. But I benefitted. The client wouldn't have kicked off if I'd really been listening earlier on. I vowed not to let it happen again. A top consultant picks up signals from clients, human being to human being. Even the best machines can't do that."



Paul Winter

MCA President (2011 - 2012) and CEO at Live Strategy

Former MCA President Paul Winter, Founder of Live Strategy, remembers his first day as a young consultant. "There were lots of grownups in the room. They seemed to have set ways of doing things and weren't always listening to the client or understanding what they wanted. After a few months, I plucked up the courage to say something – and have never looked back.

"I learned an early lesson. I've always been sceptical about people who are the age I am now! It's important not to get set in your ways. Great consulting is about listening, openness and fresh perspectives."

The biggest change in consulting Paul has noted across his working life has been increased complexity. "If you thought it was hard running a business 25 years ago, now it is many, many times more challenging." Paul also points to evolving client relationships. "In the past, relationships between consultants and clients were sometimes too close. But now some are too remote. If you want to give clients leading-edge insights, you must understand their (increasingly complex) predicament deeply. That demands a relationship of trust. We're not talking about the cosiness that leads to producer capture or echo effects. But we shouldn't be talking about cold commercial commoditisation either. The best consulting assignments are partnerships."

Paul has no doubt about his worst experience as a consultant. "I advised a restaurant chain that we couldn't accept their very generous fees because their business model simply

doomed them to failure. I hated doing it and was really apologetic. All the stats said they were just bound to fail. We couldn't risk spending reputational capital on them. And they're now a massively successful household name. Their founder sent me a copy of his book, with a note saying 'Doing fine'. Consulting's a human business. You can't win 'em all!"

Looking to the next sixty years of the MCA, Paul says the Association is a modern and relevant institution and will still be here for its 120th Anniversary. "The MCA constantly reviews and renews its self, knowing that if we don't stay ahead of the curve we can't claim to add value to the customer. Our CEO Alan Leaman and his excellent staff should be given particular credit for their leadership and patience. Imagine being the operational team on a board governed by a dozen management consultants!

"And with a few more upward movements in the retirement age, I will probably still be working sixty years from now. Which is an opportunity. Successful people have always depended on wise counsel. As I get older, I hope to get wiser.

"In reality, the future of consulting will be about collaboration and strategic partnerships. Client needs will get more and more complex. So top-range consulting will be about working together to leverage assets and opportunities as a team. Clients and consultants will have to collaborate even more. My view is that collaboration, team work and insights, always a feature of consulting, will become our industry's big story – for some time to come."



Claire Stidson

Principal Consultant at PPL Consultancy

After internships in healthcare and teaching, former Young MCA Communications Vice Chair, Claire Stidston joined health and social care specialists PPL Consulting. "I was recruited as part of the firm's expansion and was PPL's only analyst at that time. The first few days concerned induction, but by the end of that week I was working for a North East London CCG. I don't remember being nervous. Maybe I should have been! It was quite a full-on role. But I soon found my feet and

perhaps my inexperience meant I approached the client's challenge with fresh eyes."

Even Claire's three years in consulting have seen real changes. "Increasingly clients want consultants' skills and knowledge embedded within their organisation, creating a legacy of improved capability once projects have finished. Client needs are becoming more complex. This in turn drives another change: partnership working. Collaboration between consulting firms has always mattered, but it is becoming more prevalent. Alliances of firms with complementary capabilities offer clients greater value. It's a welcome, if challenging shift. Firms must think carefully about what they need to do to partner effectively."

For Claire, the MCA's value consists in providing a forum for the industry's diverse capabilities. "Our member firms compete with each other. But a network like the Young MCA represents consulting as a whole. It facilitates exchanges of ideas, improving the industry's standing and collective abilities. That's good for us and for clients."

The digital transformation of consulting, Claire argues, necessitates even greater sensitivity to human factors. "In training and development we give emotional intelligence too little prominence. Yet in truth, you can only get clients to adopt new approaches, especially threatening ones, if you use it." Claire argues that proper use of emotional intelligence should not constrain innovation. "Great consultants develop innovative ideas. But to ensure those ideas 'land', they must understand the client's perspective and be sensitive to it.

"Of course, in challenging the status quo, innovations can be unsettling. Many great innovators can hardly be described as sensitive. That's why emotional intelligence is something we need to nurture. Sometimes this has to be done at a team level to achieve the desired outcome, by combining radical thinkers with more diplomatic consultants, sensitive to client concerns."

Claire expects that the feel of consulting will change over time, especially in relation to diversity. "I've never experienced discrimination as a woman here at PPL. I am however aware of the glass ceilings others encounter in the industry. Evidence from the recent Young MCA survey, and other initiatives, suggests that the industry is moving in the right direction, but still has a way to go. The basic point, however, is this. My generation will not tolerate discrimination and a lack of diversity. Indeed we see embracing diversity as fundamental to delivering the most value. I hope we will move the debate on from restitutive initiatives to a diversity of real difference, a richer palette of perspectives from which we can draw to offer clients the best services possible."



Pat Newberry

MCA President (2010 - 2011), MCA Awards Judge, and Non-Executive Director at Paragon Bank Plc

Former MCA President Pat Newberry transferred from his role as an audit partner in a Big Four firm to become a consulting partner. At that time, unlike in some periods of consulting growth, it was an unusual move. "I saw it as a real opportunity. The consulting practice wanted me because of my financial services experience. But some audit partners thought I'd lost my marbles and didn't speak to me for years!"

Pat contrasts his route into consulting with today's industrial-scale graduate and school-leaver recruitment. "As a decision-maker in an expanding organisation, I understood we needed substantial recruitment of the best young people. But it's not without challenges. Throughout my career, the calibre of UK executives and boards has improved enormously. To impress them, you need either experienced experts with records in getting results or people with valuable new perspectives. Graduates can't be the former, so we must ensure they're the latter."

Here, training is crucial. "I brought accountancy's rigour with me into consulting. But I acquired the ability to listen to clients, sell, and practice change management on the job. Nowadays, young recruits often bring new digital accomplishments into our industry. We must also equip them with consulting's technical disciplines and those soft communications skills. The goal is high-value teams, combining seasoned campaigners who speak the language of a particular business sector, consultants with delivery track records, and recruits with cutting-edge capabilities."

The dotcom bubble provided Pat's worst experience in consulting. "We laid off many staff. A division of 850 consultants shrank to 600. Letting other partners go was especially bitter. But it taught me to trust my instincts. I'd been uneasy throughout the dotcom boom, worried it was built on sand. I've been cautious about fads ever since.

"The experience also taught the company to handle adversity differently. When growth returned after that redundancy

round, we weren't ideally prepared. So after the 2008 crash, we did our utmost to retain staff. The fact that we provided great client value and thrived commercially even before the economy's return to growth in 2013 amply justifies that approach."

Pat says the MCA enhances consulting's professionalism and bolsters its reputation. "The Association sets high standards and encourages the world to see the value of what consultants do."

The technological evolution of consulting, Pat suggests, will bring both challenge and opportunity. "Change and the associated elevation of collective capability are hardly new. Leech-wielding apothecaries died out. Now we have brain surgeons. Artificial Intelligence: it's happening. Business disintermediation: it continues apace. Look at the architectural profession. Surveys show their standing has fallen and much of their work can now be done by computers. They will need to reinvent to retain their primacy. The consulting profession may face similar challenges.

"Indeed, consultants are already reinventing successfully. New recruits steeped in digital culture will explore the outer limits of digital innovation. Technology will force us to rethink the value we bring clients and how we work. But that's fine. It keeps us on our toes and our clients happy."

"The Association sets high standards and encourages the world to see the value of what consultants do."

The Nine Principles of Consulting Excellence

To coincide with our 60th Anniversary Celebration, the MCA has launched Consulting Excellence. The Nine Principles of the scheme are:

1 // ETHICAL BEHAVIOUR

Consulting Excellence firms work with clients, partners, employees and other stakeholders in an ethical way. This means:

- We are responsible and good citizens.
- We conduct our business ethically.
- · We foster an ethical culture.

2 // CLIENT SERVICE AND VALUE

Consulting Excellence firms promote the highest standards of client service and value. This means:

- We provide excellent consulting services which deliver the outcomes clients seek and need.
- We are transparent with clients and respond to their concerns.
- We always strive to improve the value we can deliver to our clients.

3 // PROFESSIONAL DEVELOPMENT

Consulting Excellence firms develop the capabilities of their consultants, provide career development opportunities and support the welfare of all their employees. This means:

- We undertake training and professional development planning each year.
- We promote strong core consulting capabilities and specialisms in our consultants and teams.
- We support our employees' career progression, professional development and welfare





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