

EXTRACT



Market Trends

MARKET

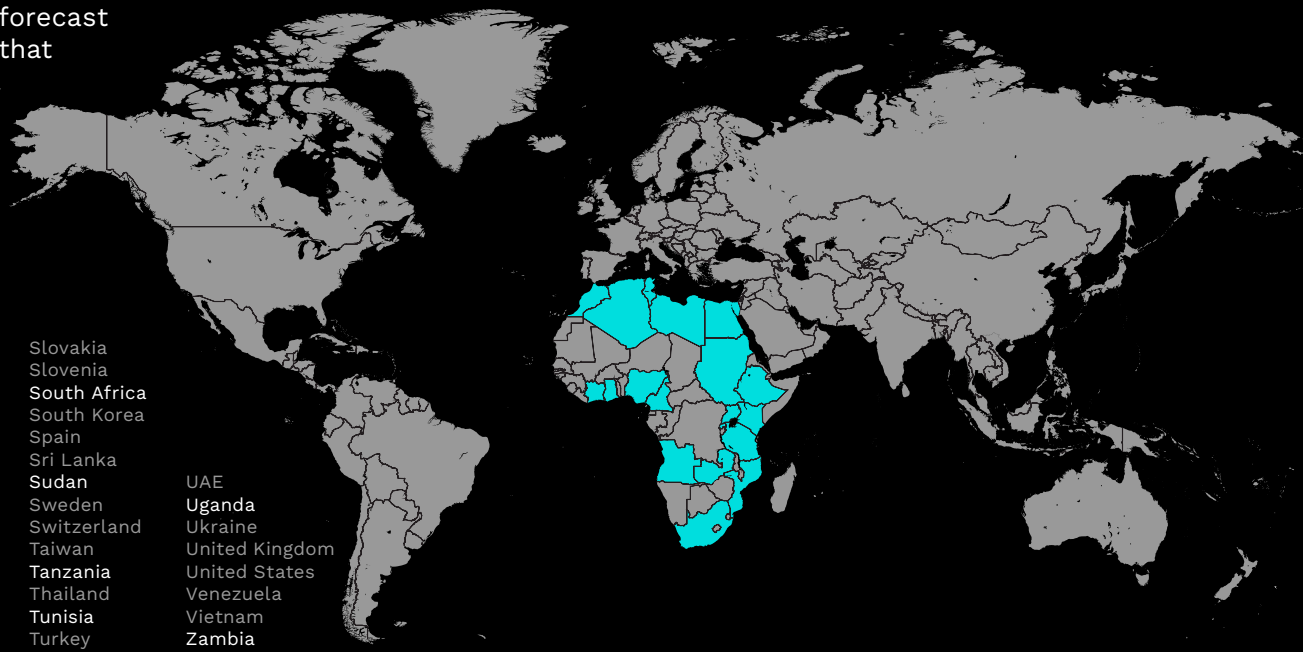
The Africa Consulting Market
in 2024

Report

Aug 2024

What's included in this report

Our reports offer a wealth of market sizing, growth, and forecast data alongside engaging, in-depth analysis of the trends that matter. Using our highly flexible, multidimensional model we provide firms with robust, trusted data to make informed decisions about strategic investments and plan for the future.



Geography model

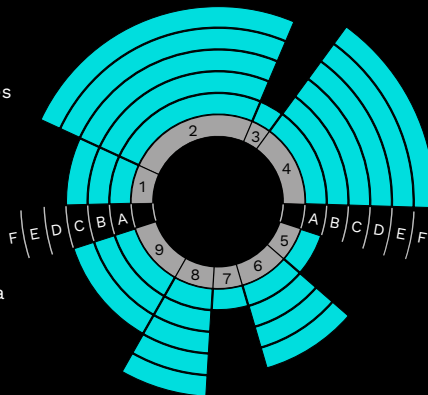
Countries covered

Albania	Chile	Greece	Libya	Pakistan	Slovakia	
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia	
Angola	Colombia	Hungary	Malaysia	Peru	South Africa	
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea	
Australia	Croatia	Indonesia	Morocco	Poland	Spain	
Austria	Cyprus	Iran	Mozambique	Portugal	Sri Lanka	
Bahrain	Czech Republic	Iraq	Myanmar	Qatar	Sudan	UAE
Belarus	Denmark	Ireland	Netherlands	Romania	Sweden	Uganda
Belgium	Egypt	Israel	New Zealand	Russia	Switzerland	Ukraine
Bosnia	Ethiopia	Italy	Nigeria	Saudi Arabia	Taiwan	United Kingdom
Brazil	Finland	Japan	North Macedonia	Serbia	Tanzania	United States
Bulgaria	France	Kenya	Norway	Singapore	Thailand	Venezuela
Cameroon	Germany	Kuwait	Oman		Tunisia	Vietnam
Canada	Ghana	Lebanon			Turkey	Zambia

Sector model

Sectors

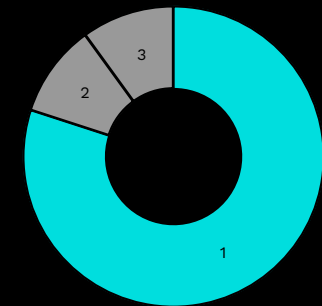
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & life sciences
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



Sub-sectors

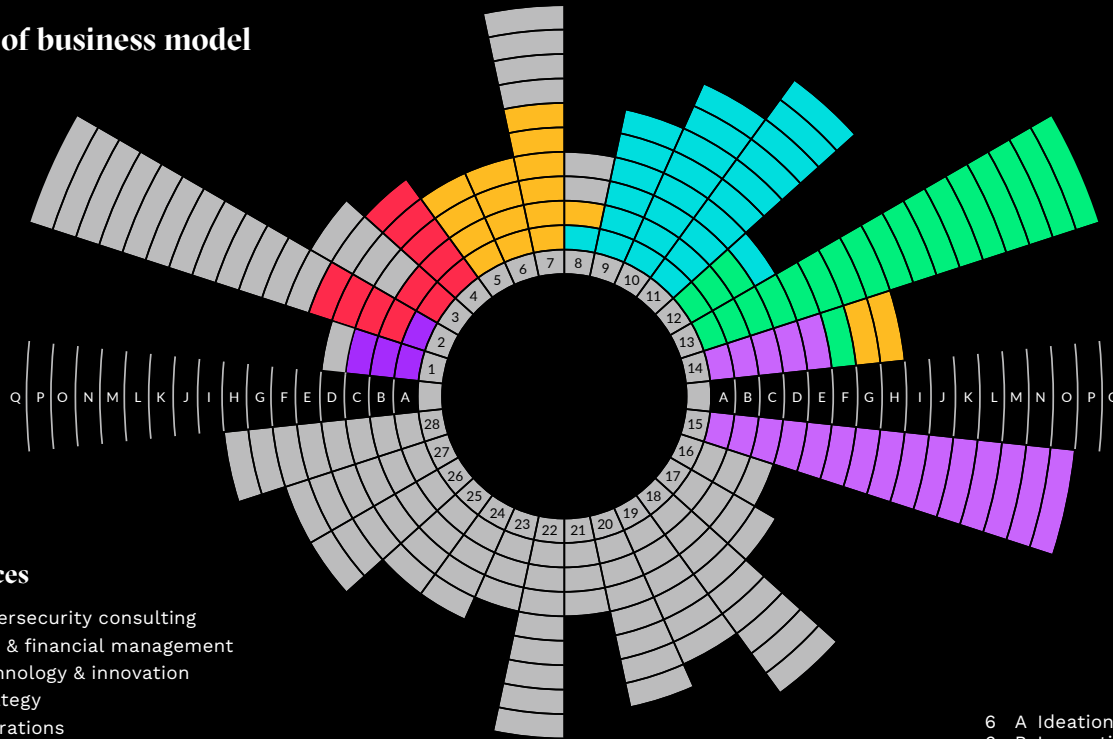
- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 1 A Energy | 4 A Aerospace | 8 A Business services |
| 1 B Primary resources | 4 B Automotive | 8 B Leisure |
| 1 C Utilities | 4 C Construction | 8 C Logistics |
| 2 A Banking | 4 D Consumer electronics | 8 D Real estate |
| 2 B Capital markets | 4 E Consumer packaged goods | 8 E Transportation |
| 2 C Insurance | 4 F Industrial products | 9 A High-tech |
| 2 D Investment and wealth management | 5 A Pharma | 9 B Media |
| 2 E Private equity | 6 A Defence | 9 C Telecoms |
| 3 A Healthcare | 6 B Education | |
| | 6 C Not-for-profit | |
| | 6 D Public sector | |
| | 7 A Retail | |

The revenue-earning model



- 1 Consulting
- 2 Managed service
- 3 Other (contingent fees, software licensing, associate networks)

Line of business model



Services

- Cybersecurity consulting
- Risk & financial management
- Technology & innovation
- Strategy
- Operations
- HR, change & people strategy

Line of business

- | | |
|---------------------------------|------------------------------|
| 1 Cybersecurity | 20 Legal |
| 2 Risk | 21 Litigation |
| 3 Forensic | 22 Marketing & creative |
| 4 Financial management | 23 Network engineering |
| 5 Design & UX | 24 Product engineering & R&D |
| 6 Innovation | 25 Recruitment |
| 7 Technology | 26 Software engineering |
| 8 Data & analytics | 27 System integration |
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| 10 Deals | |
| 11 Strategy | |
| 12 Real estate | |
| 13 Operations | |
| 14 Sustainability | |
| 15 HR & change | |
| 16 Architecture | |
| 17 Audit & assurance | |
| 18 Business process outsourcing | |
| 19 Civil engineering | |

Capabilities

- | |
|--|
| 1 A Cybersecurity advice |
| 1 B Cybersecurity incident response |
| 1 C Penetration testing & wargaming |
| 2 A Technology & security risk services |
| 2 B Operational risk |
| 2 C Programme risk |
| 2 D Responding to regulation |
| 2 E Risk management |
| 3 A eDiscovery |
| 3 B Forensic accounting |
| 4 A Budgeting/financial planning process |
| 4 B Debt advisory |
| 4 C Finance function |
| 4 D Financial advisory |
| 4 E Financial restructuring & insolvency |
| 5 A Corporate identity |
| 5 B Customer journey & UX benchmarking |
| 5 C Graphic & UI design |
| 5 D UX & service design |
| 6 A Ideation |
| 6 B Innovation management |
| 6 C Innovation strategy |
| 6 D Strategies for growth from innovation |
| 7 A Cloud advice |
| 7 B ERP consulting |
| 7 C IT strategy, planning & review |
| 7 D IT training |
| 7 E Programme management |
| 7 F Vendor selection |
| 8 A Advanced analytics |
| 8 B Data visualisation, business intelligence & semantic layer |
| 9 A Customer feedback |
| 9 B Customer segmentation |
| 9 C Employee feedback |
| 9 D Environmental & social impact research |
| 9 E Macro/microeconomic research |
| 9 F Market research |
| 10 A Capital allocation strategy |
| 10 B Commercial due diligence & valuation |
| 10 C Financial due diligence |
| 10 D M&A transaction strategy |
| 10 E Operational due diligence |
| 10 F Portfolio & investment strategy |
| 10 G Public-private partnerships |
| 10 H Technology due diligence |

- | |
|---|
| 11 A Business & financial modelling |
| 11 B Category management |
| 11 C Channel management |
| 11 D Corporate recovery & turnaround |
| 11 E Corporate restructuring |
| 11 F Corporate strategy |
| 11 G Market analysis & strategy |
| 11 H Policy formulation |
| 11 I Pricing |
| 11 J Strategic sourcing/offshoring services |
| 12 A Corporate, occupier services & facilities management |
| 12 B Integrated real estate developer services |
| 12 C Real estate deal/transaction services |
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| 13 C Cost cutting |
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| 13 K Process design, re-engineering & automation |
| 13 L Procurement/purchasing |
| 13 M Property & estate management |
| 13 N Sales & distribution planning |
| 13 O Sales force effectiveness |
| 13 P Supply chain management |
| 13 Q Target operating model |
| 14 A Purpose-led strategy & change |
| 14 B Resource-efficiency implementation |
| 14 C Resource-efficiency strategy |
| 14 D Social impact & trust |
| 14 E Sustainable investment |
| 14 F Sustainable supply chain |
| 14 G Clean technology |
| 14 H Green IT |
| 15 A Benefits, compensation & pensions, excluding actuarial & investment advice |
| 15 B Change management |
| 15 C Diversity & inclusion |
| 15 D Employee engagement |
| 15 E Governance & board effectiveness |
| 15 F HR strategy & effectiveness |
| 15 G Leadership |
| 15 H Organisational design & culture |
| 15 I Organisational training & development |
| 15 J Outplacement |
| 15 K Pension fund evaluation & advice |
| 15 L Performance management |
| 15 M Stakeholder management |
| 15 N Talent management |
| 15 O Team effectiveness & collaboration |

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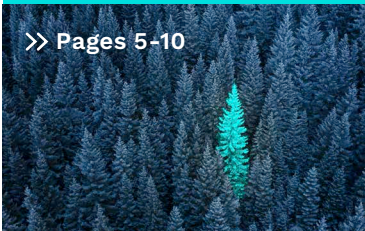
What really matters

We identify the things that really matter to firms—a snapshot of the most important dynamics in the market.

The big answers

We ask Source's experts what they think are the big opportunities and risks in today's market.

>> Pages 5-10



2

Market overview

Bringing together our market data, forecasts, and analysis, we provide a comprehensive picture of the state of play from a geographical, sector, and line-of-business perspective.

>> Pages 11-17



3

Client priorities

Using data from our survey of senior buyers of consulting, we explore the most important priorities, opportunities, and challenges for clients.

>> Pages 18-30

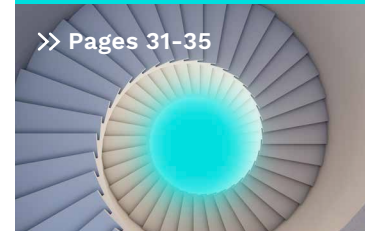


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Implications for firms

We take a look at the factors influencing clients' buying behaviours, and what this means for the services firms provide.

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Insights from consultants

In this series of interviews, senior leaders from professional services firms offer their perspectives on what really matters in the market today.

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1



“It’s been a challenging year due to economic pressures and political uncertainty. Clients had to revisit capital spend and reprioritise growth initiatives.”

Hannelie Gilmour, PwC South Africa

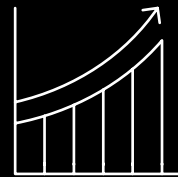
What really matters

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Three things for a firm to act on

1

Firms in Africa faced a tough market in 2023, with consulting revenues growing by just 1.9%.



8%

The Egypt consulting market is forecast to grow by 8% in 2024

Against a backdrop of high inflation and geopolitical turbulence, the consulting market in Africa experienced growth of just 1.9%. However, firms should take comfort in the fact that this low growth looks set to pick up.

Clients now realise that this is the time to invest into their businesses, focusing on resilience and productivity improvements that will insulate them from any further economic shocks. We are forecasting a more robust growth rate of 5% for the Africa consulting market in 2024.

The slow growth in 2023 was not uniform across the continent. Large markets like Egypt were far keener than some of the smaller countries to engage with consultants, resulting in the consulting market in this country growing by 4.9%. Large scale investments into infrastructure projects, as well as healthy foreign investment from the GCC, means that this growth will be sustained into 2024. In fact, the growth rate looks set to almost double to 8%. Kenya, Ghana, and the Ivory Coast are all also expected to see very healthy high single-digit growth going into 2024.

Despite shallow growth last year, consulting firms should take comfort in the fact that clients are now aware of what needs to change within their own organisations. As such, they are keen to engage with external support to access the expertise needed to help them achieve their goals.

2



“Overall, the consulting market has stood up relatively robustly, but we are not seeing the huge pace of growth we’ve seen in regions like the Middle East.”

Paul Calvey, Oliver Wyman South Africa

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3



“Business transformation remains the primary driver, especially in technology and innovation, and cybersecurity remains a key area of focus.”

Gerald Kasimu, KPMG

Client priorities

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What are clients' top needs and priorities?

Clients in Africa are less confident than their global peers, as they struggle with rising costs and macroeconomic volatility

Following the global trend of high inflation and geopolitical instability, clients in Africa have found themselves in adverse economic conditions. This is reflected in an overall mood of pessimism, with 40% of clients telling us their confidence has been significantly reduced. This compares to regions like India and the GCC, where only 26% and 31% are expressing significantly reduced confidence, respectively.

When asked about the reasons why confidence has taken such a sharp decline, clients point towards extensive international operations and rising costs, along with falling consumer demand. Political uncertainty, particularly in South Africa, also meant that many companies had been holding off investments until the political situation became clearer. With a new government now in office in South Africa, this is likely to pick up again soon.

Foreign investment is an essential source of funding for clients, but despite FDI increasing over the last year, fluctuations in exchange rates have had a significant impact on the ability of companies to operate and invest. This volatility was particularly acute in 2023 and is having a negative effect across Africa. However, as will be discussed later in this report, there are signs of improvement here—particularly for clients in northern Africa.

Amid all the economic gloom, we have seen one bright spot from our respondents in Egypt. Due to large state-led infrastructure projects and healthy investment from the GCC, clients in Egypt are far more positive about the market. Forty percent of respondents say their confidence has not reduced due to the macroeconomic environment, which makes a stark contrast to the 20% average across Africa as a whole.

Figure 7

To what extent have macroeconomic and political tensions impacted your confidence when thinking about the future of your organisation?

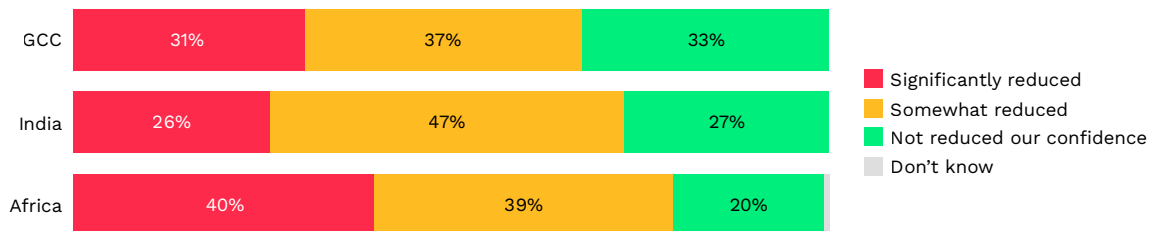
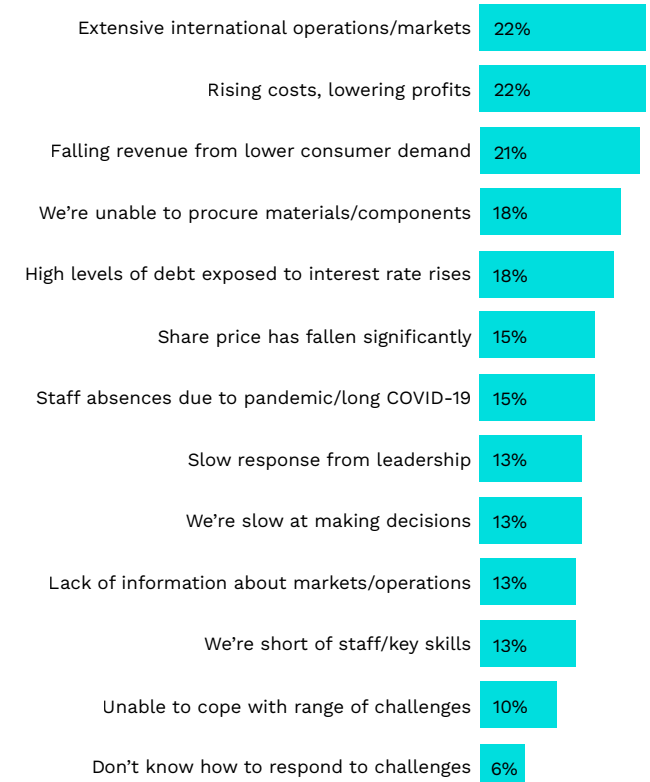


Figure 8

Why have macroeconomic and political tensions reduced your business confidence?



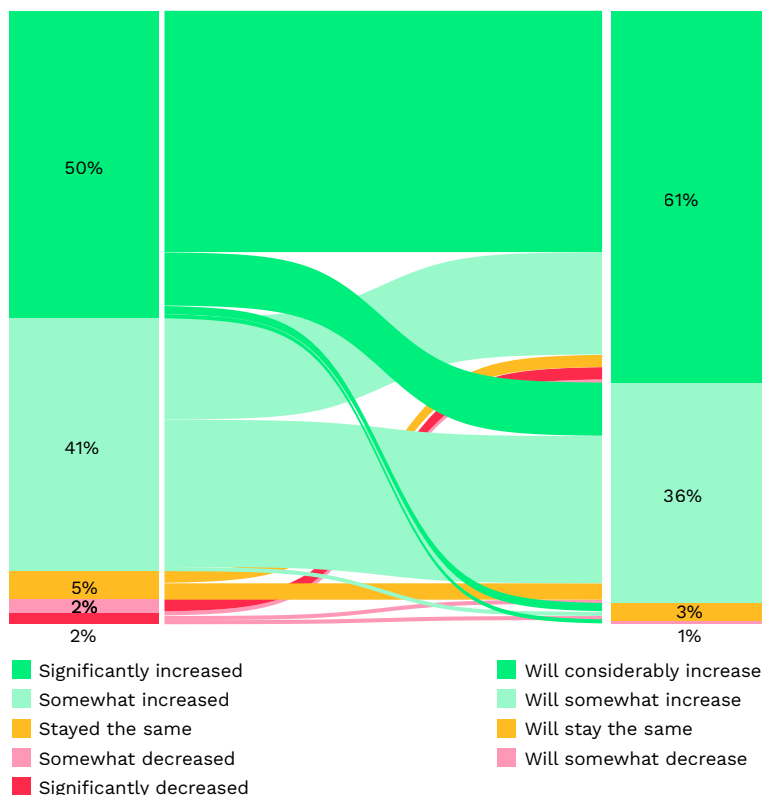
Clients are aiming to realise efficiency improvements by investing in technology

Figure 17

How has your organisation's investment in digital technology changed in the last year? Compared against how do you expect your organisation's investment into digital technology to change in the next 18 months?

How has your organisation's investment in digital technology changed in the last year?

How do you expect your organisation's investment in digital technology to change in the next 18 months?



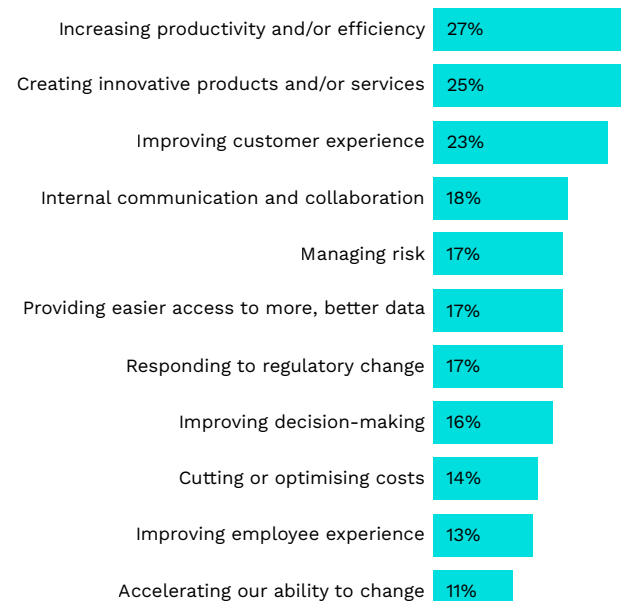
There appears to be a more pronounced urgency to channel funds into digital technology across Africa, with 61% of clients looking to increase their technology spend in the next 18 months, compared to 50% in the past year.

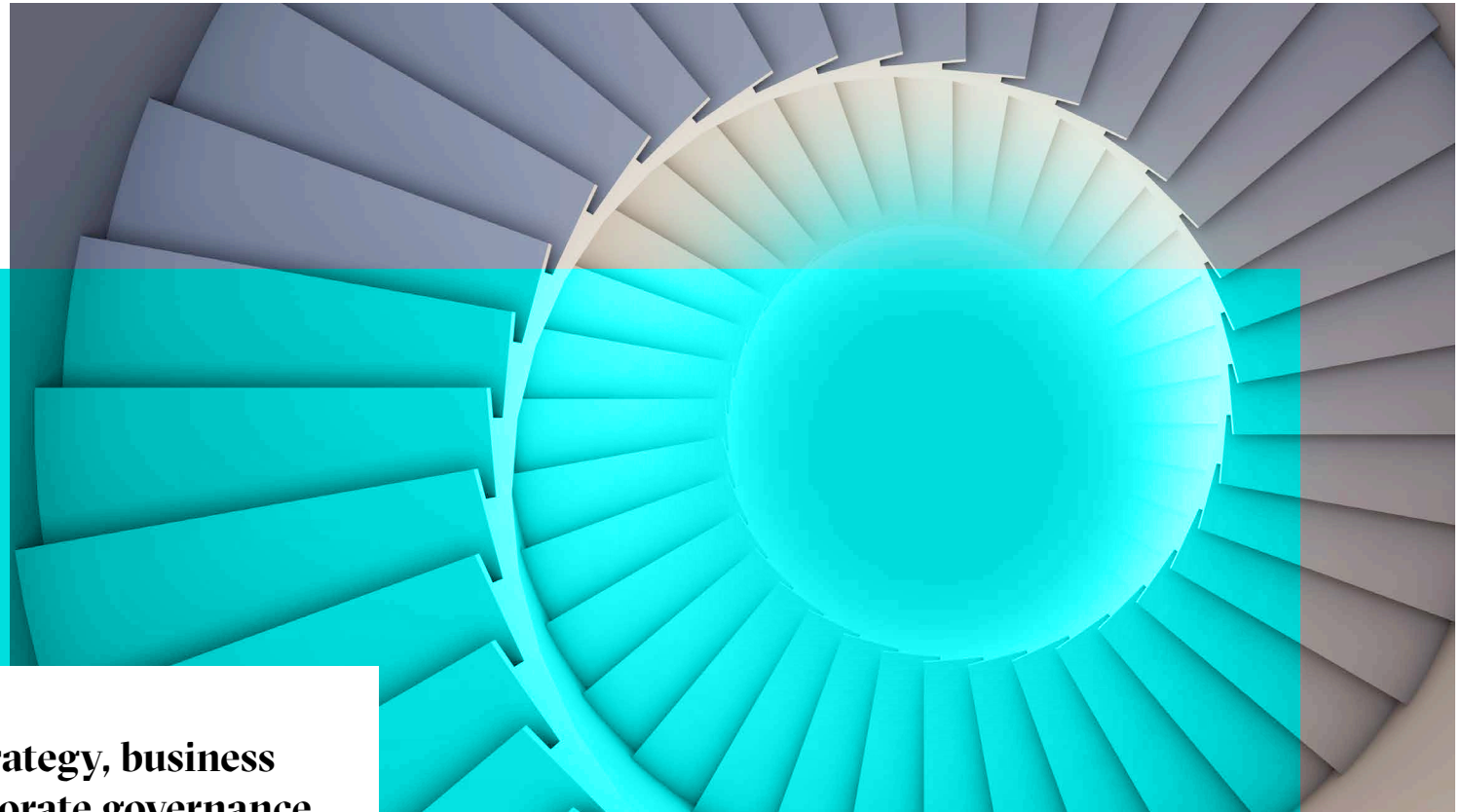
Clients seem to view technology investment as a necessity in the coming year, as they look for a single solution that can solve multiple different problems within their organisations. In particular, clients are aiming to boost their productivity levels, create innovative services, and improve customer experiences. With consumer confidence low, clients are looking for ways to improve their position in the market by making their products and services more appealing to customers.

As technology will be such a fundamental part of clients' plans for the future, it is essential that firms have deep expertise in this field. Technology skills have been identified as hard to find in the general workforce, and this will likely be a key driver of consulting demand.

Figure 18

In which two areas do you think better use of digital technology would have the biggest impact in your organisation?





“Demand for strategy, business development, corporate governance, executive coaching, and talent development are increasingly pushing demand, even with all the economic drawbacks.”

Mohamed Radwan, Platinum Partners

Implications for firms

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- Despite increased demand, firms will only be able to charge a premium if they demonstrate their specialist expertise.....33
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“The atmosphere on the ground is probably the most positive thing about that market; people have a growth mindset.”

Hennie Human, EY

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6



“The African renaissance hasn’t exploded yet but it really has massive potential.”

Adam Craker, IQbusiness South Africa

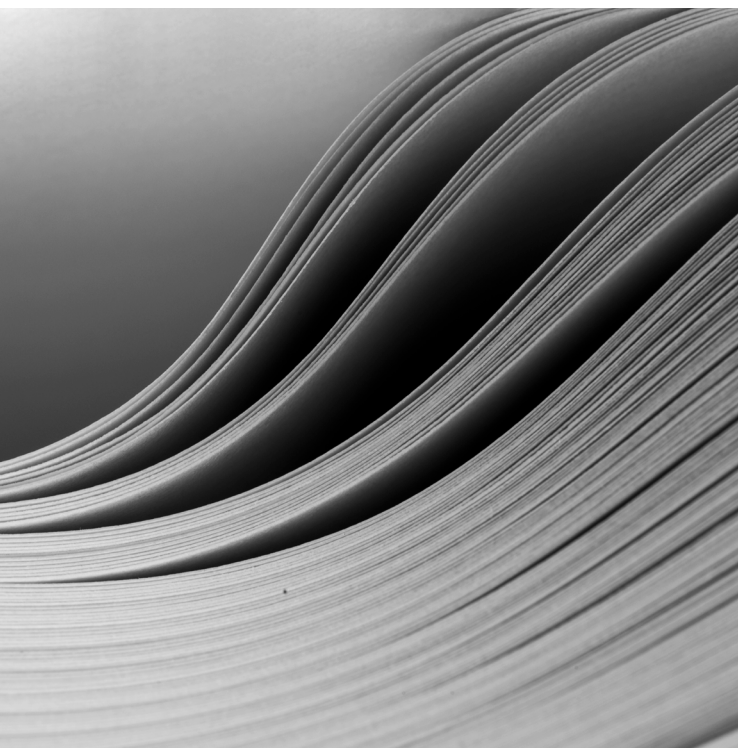
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Our approach to gathering data

The market for professional services is vast and highly dynamic, with deep roots spread out across the business world. The Source MegaModel helps you get to grips with the facts.

The MegaModel is the largest and most comprehensive database of its kind, anywhere in the world. It's used by the world's leading firms to identify where growth is coming from, which markets to invest in, and which sectors are driving demand.



Methodology—The MegaModel

MegaModel: Our Global Data Model

The quantitative market data in this report comes from our unique model of the global professional services market.

Rather than making high-level assumptions, this model has been built from the bottom up, sizing the market capability by capability—assessing how much work a firm earns delivering each professional capability within each sector and country. This results in a robust view of the size of the supply-side market, which can then be broken down to view the size of the market by country, sector, line of business, capabilities, and service.

Alongside this market segmentation, we also limit our market sizing and analysis to what we at Source call “big consulting”—work done by mid and large-sized firms (those with more than 50 people). Please note that we don't track the long, thin tail of work done by contractors and very small firms, as most readers of this report would not seek or be able to compete in this part of the market.

All of the data in the model is calibrated through extensive interviews with, and surveys of, professional services firms and their clients, allowing us to discuss broader trends in the market alongside detailed dimensions such as headcount. These interviews and surveys are supplemented with desk research, which allows us to assess the impact of wider macroeconomic trends on professional services. This, combined with our detailed modelling, results in a long-term view of the market that is able to support both historic and forecast data.

All figures given in this report are in US dollars.

US dollar to British pound US\$1 = £0.80

US dollar to euro US\$1 = €0.92

The data in this report is rounded to the nearest whole number or stated decimal place. As a result, totals may display small discrepancies.

Who did we speak to

Client perspective

We carry out a client survey to help us build a rich picture of how different trends in Africa are affecting clients' organisations and their use of consulting. Our survey focuses on trends in Africa, providing detailed insights into the nuances of the market. For this, we surveyed 150 senior clients of consulting firms from across Africa, all of whom work in organisations with more than 1,000 employees. This survey focuses on the following areas:

- How they expect to use consultants during 2024 and the first half of 2025
- Factors that affect the way clients work with consulting firms
- The ways consulting firms market themselves to clients and the impact this has on client decision making.

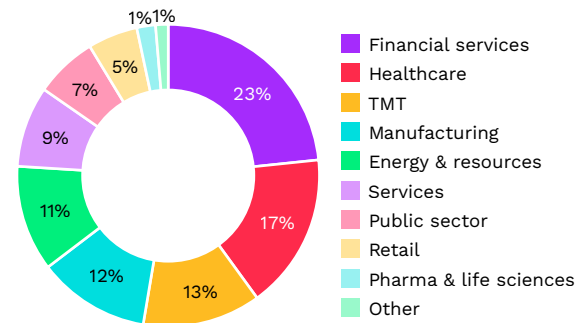
Insights from consultants

Throughout the year, Source analysts remain plugged in to the global consulting market through our bespoke research and consulting projects, adding further depth to our understanding of the consulting industry.

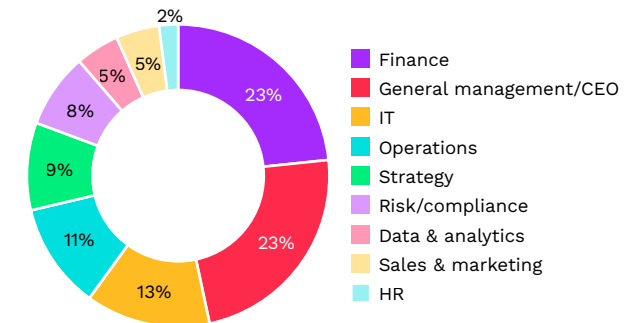
In-depth desk research

We also conducted a thorough PEST analysis in Africa that drills down into finer macroeconomic details on a holistic and sector-by-sector basis and allows us to fit our research into a wider macroeconomic picture.

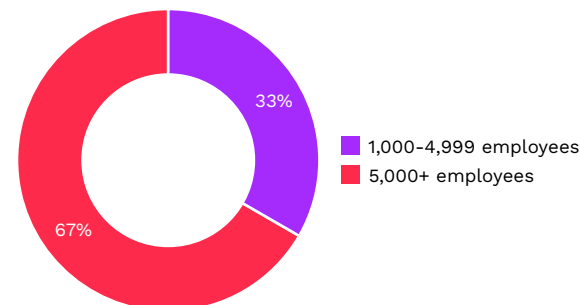
Respondents by sector



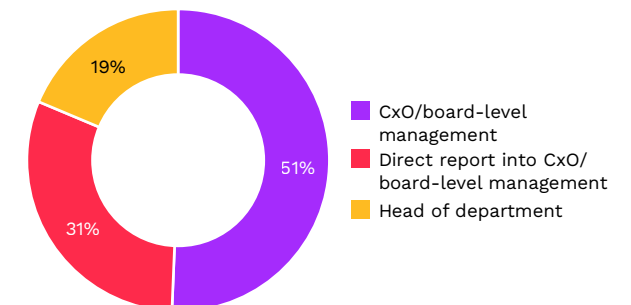
Respondents by function



Respondents by organisation size



Respondents by seniority



Definitions of sectors and services

Sectors

Energy & resources

Energy

Includes the exploration and production of energy, including oil, gas, coal, and renewables.

Utilities

Includes the delivery of electricity, gas, water, sanitation, and other related services.

Primary resources

Includes agriculture, chemicals and chemical products, commodities, forestry, fishing, metals, mining, and plastics.

Financial services

Banking

Includes retail banking, commercial banking, and lending.

Insurance

Includes general insurance (e.g., motor, home, pets, health—anything on an annual contract), life insurance, pension products, and retirement planning.

Private equity

Includes both consulting work for private equity firms and consulting work with private equity portfolio businesses.

Capital markets

Includes investment banking, trading of stocks and financial products, corporate finance, and broking.

Investment and wealth management

Includes private banking, high net-worth banking, investment management, trust funds, the management of pension funds, and asset management.

Manufacturing

Aerospace

Includes space research and technology, the manufacture of aircraft, aircraft parts, rockets and other space equipment, and tanks and ammunition.

Automotive

Includes the manufacture of motor vehicles, industrial vehicles, and vehicle supplies and parts.

Construction

Includes surveying, architectural, and engineering services, heavy construction, house building, and the building of infrastructure.

Consumer packaged goods

Includes the manufacture of clothes, foods, alcohol, tobacco, furniture, home furnishings, cleaning products, small arms, children's toys, and sports equipment.

Consumer and industrial electronics

Includes electrical components, household and industrial appliances, commercial and professional equipment.

Industrial products

Includes industrial machinery, steel and metal products, and plastic products.

Pharma & life sciences

Includes research into and the production of drugs, biological products, medicinal chemicals, and life sciences.

Healthcare

Includes private and publicly-funded healthcare, hospitals, laboratories, and medical equipment.

Public sector

Government

Includes federal/national, state/regional, local government, emergency services, justice, social services, public transport, and conservation.

Education

Includes public and private schools, universities, and libraries.

Defence

Includes national security and consulting around defence issues.

Not for profit

Includes non-commercial research organisations, religious, political and professional membership organisations, trusts, labour unions, and business associations.

Retail

Includes the selling of clothes, food, consumer goods, and automobiles.

Services

Logistics

Includes warehousing, storage, packing and crating, and distribution including cargo, freight, and haulage.

Business services

Includes services relating to law, accountancy, IT maintenance, security systems, advertising, employment agencies, and vehicle leasing.

Leisure

Includes museums, art galleries, theatre, golf courses, hotels, hospitality, travel agencies, restaurants, and bars.

Real estate

Includes estate agencies and operators of residential and commercial buildings.

Transportation

Includes private and people-related transportation, including airlines, airport management, train operators, rail infrastructure management, water transportation, courier services, and private bus services.

Technology, media & telecoms

Telecoms

Includes telephone, mobile, digital, and other communication services.

High-tech

Includes IT-related devices, computer and computer-related devices, audio and video equipment, broadcasting and communication equipment.

Media

Includes radio, television, and digital broadcasting stations and services as well as printing and publishing of newspapers, periodicals, and books.

Services

We've taken the lines of business and capabilities from our taxonomy that broadly align with traditional definitions of consulting and divided them into services that include the following. Please note that for some lines of business, for example, forensics, we've taken a subset of the relevant capabilities and excluded others.

Cybersecurity consulting

Cybersecurity advice, Cybersecurity incident response, Penetration testing & wargaming, Technology & security risk services.

HR, change & people strategy

Benefits, compensation & pensions, excluding actuarial & investment advice, Change management, Diversity & inclusion, Employee engagement, Governance & board effectiveness, HR strategy & effectiveness, Leadership, Organisational design & culture, Organisational training & development, Outplacement, Pension fund evaluation & advice, Performance management, Stakeholder management, Talent management, Team effectiveness & collaboration, Resource-efficiency strategy, Purpose-led strategy & change, Resource-efficiency implementation, Social impact & trust.

Operations

Benchmarking, Business continuity & recovery, Cost cutting, Customer service, DevOps, Distribution strategy, Lean & Six Sigma, Operational review, Outsourcing advice, Post-M&A integration, Process design, re-engineering & automation, Procurement/purchasing, Property & estate management, Sales & distribution planning, Sales force effectiveness, Supply chain management, Target operating model, Sustainable supply chain, Corporate, occupier services & facilities management, Integrated real estate developer services, Real estate deal/transaction services.

Risk & financial management

Operational risk, Programme risk, Responding to regulation, Risk management, Budgeting/financial planning process, Debt advisory, Finance function, Financial advisory, Financial restructuring & insolvency, eDiscovery, Forensic accounting.

Strategy

Capital allocation strategy, Commercial due diligence & valuation, Financial due diligence, M&A transaction strategy, Operational due diligence, Portfolio & investment strategy, Public-private partnerships, Technology due diligence, Business & financial modelling, Category management, Channel management, Corporate recovery & turnaround, Corporate restructuring, Corporate strategy, Market analysis & strategy, Policy formulation, Pricing, Strategic sourcing/offshoring services, Real estate strategy, Environmental & social impact research, Macro/microeconomic research, Market research, Customer feedback, Customer segmentation, Employee feedback, Advanced analytics, Sustainable investment.

Technology & innovation

Ideation, Innovation management, Innovation strategy, Strategies for growth from innovation, Cloud advice, ERP consulting, IT strategy, planning & review, IT training, Programme management, Vendor selection, Clean technology, Green IT, Corporate identity, Graphic & UI design, UX & service design, Customer journey & UX benchmarking, Data visualisation, business intelligence & semantic layer.

Contributors

We are extremely grateful to all the people we spoke to for making this report possible. On this page is a list of individuals who have contributed (excluding those consultants who wished to remain anonymous).

Name	Job title	Organisation
Paul Calvey	Partner, Head	Oliver Wyman South Africa
Adam Craker	CEO	IQbusiness South Africa
Hannelie Gilmour	Consulting Lead Partner	PwC South Africa
Hennie Human	Africa Consulting Leader	EY
Gerald Kasimu	Partner and Head of Advisory (East Africa)	KPMG
Keshava Naidu	Clients and Markets Leader – Consulting & Risk Services	PwC South Africa
Mohamed Radwan	Managing Director	Platinum Partners

Meet the experts

Dane Albertelli

Dane is a Senior Research Analyst within the Market Trends team. He currently conducts research on global market trends within the professional services sector. He has also carried out bespoke mergers & acquisitions scans for clients hoping to enter the US IT services sector. He has written a number of specialised reports on the state of the professional services market in regions such as GCC and Australia.

Dane Albertelli

✉ dane.albertelli@sourceglobalresearch.com



About us

We help professional services firms **understand what really matters when facing decisions of vital importance.**

The best decisions are based on evidence, objectivity, and a willingness to change. That's why, at Source, we tell you what you need to hear, rather than what you want to hear.

We draw upon our deep roots within the professional services sector to provide firms with a clear picture of their clients' worlds. Through comprehensive research and meticulous analysis, we pinpoint what truly matters and deliver actionable insights that help firms map out the right way forward.

We believe in thriving individually and succeeding together. And we would love to help your firm crack its latest conundrum.

Source Information Services Ltd
20 Little Britain | London | EC1A 7DH
UK +44 (0) 20 3743 3934
US +1 800 767 8058
info@sourceglobalresearch.com
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