

EXTRACT



Market Trends

MARKET

**The Technology, Media & Telecoms
Consulting Market in 2024**

Report

Aug 2024

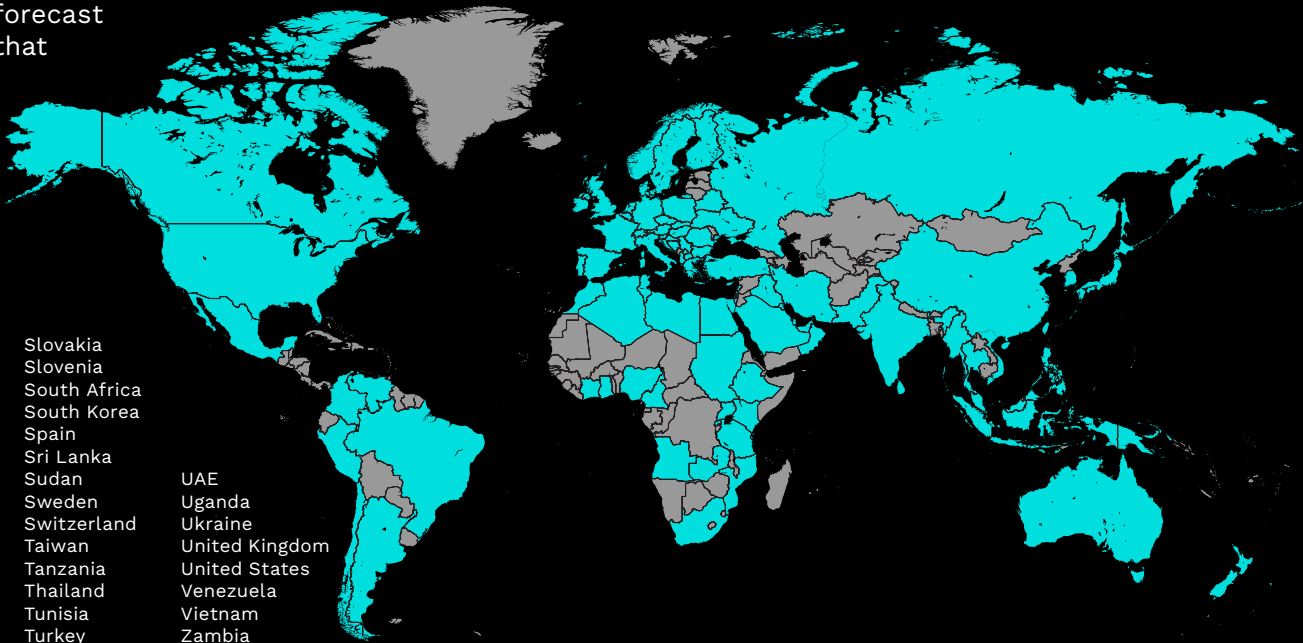
What's included in this report

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

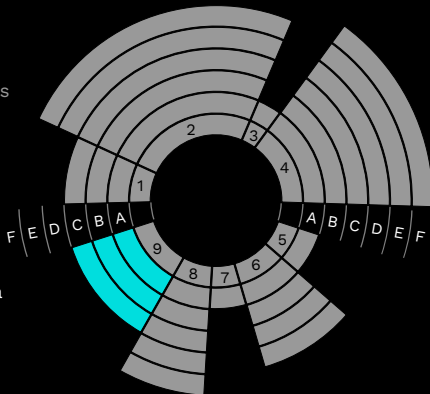
Albania	Chile	Greece	Libya	Pakistan	Slovakia
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia
Angola	Colombia	Hungary	Malaysia	Peru	South Africa
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea
Australia	Croatia	Indonesia	Morocco	Poland	Spain
Austria	Cyprus	Iran	Mozambique	Portugal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



Sector model

Sectors

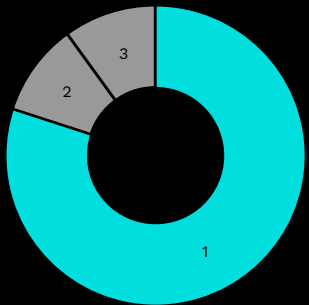
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & life sciences
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



Sub-sectors

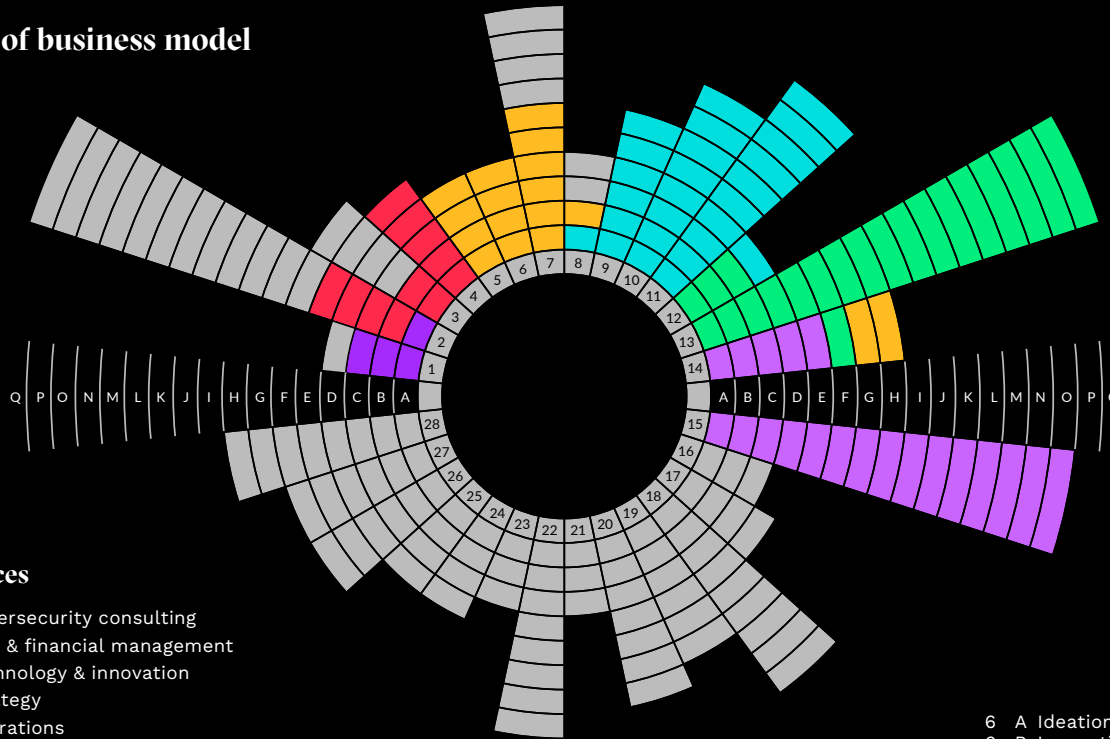
- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 1 A Energy | 4 A Aerospace | 8 A Business services |
| 1 B Primary resources | 4 B Automotive | 8 B Leisure |
| 1 C Utilities | 4 C Construction | 8 C Logistics |
| 2 A Banking | 4 D Consumer electronics | 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 |
| 9 Research | 28 Tax |
| 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 |
| 12 D Real estate strategy |
| 13 A Benchmarking |
| 13 B Business continuity & recovery |
| 13 C Cost cutting |
| 13 D Customer service |
| 13 E DevOps |
| 13 F Distribution strategy |
| 13 G Lean & Six Sigma |
| 13 H Operational review |
| 13 I Outsourcing advice |
| 13 J Post-M&A integration |
| 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 |

Contents

Underpinned by our MegaModel, our reports deliver an independent and objective understanding of the markets that matter most; including everything from key trends and growth opportunities to the latest views of consulting leaders and a detailed analysis of the buyer's voice.

1

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 11-21

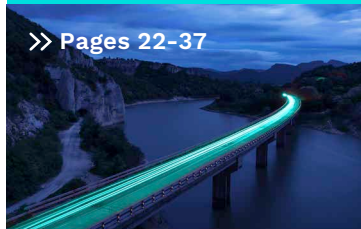


3

Client priorities

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

>> Pages 22-37

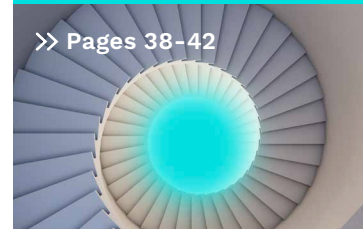


4

Implications for firms

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

>> Pages 38-42



5

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.

>> Pages 43-48



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1



“Clients continue to require consulting support, but now it’s for short-term, lower-cost, and high-impact projects.”

Cristóbal Escoda, NAE

What really matters

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The big answers... on the technology, media & telecoms consulting market.....9

Three things for a firm to act on

1

The TMT sector experienced a difficult year in 2023, but is expected to bounce back in 2024.



3.2%

The TMT consulting market grew by 3.2% in 2023

Following a year of strong growth in 2022, the TMT consulting market faced much tougher conditions in 2023, expanding by just 3.2%. While each sub-sector's experience varied somewhat, the slowdown was evident in all three—telecoms, media, and high-tech.

Nevertheless, demand grew (if gently) in the majority of service lines. The biggest slowdowns occurred in HR, people & change consulting and strategy services, with the former recording a contraction. From a regional perspective, China and Eastern Europe & Russia saw some declines in the consulting market, albeit low-single-digit levels as macroeconomic conditions and political turmoil continued to affect the regions respectively.

Looking ahead, we expect 2024 to bring signs of recovery for the consulting market. Clients' confidence remains shaken, and the macroeconomic environment has shown few signs of improvement. However, unlike previous years where crises came as somewhat of a surprise, clients are now accounting for the possibility of more challenges when planning out the next few years. Overall, we expect the growth rate to return to mid-single digits (around 6%) in 2024, although HR, people & change consulting will continue to decline.

2



Market overview

“The downturn from 2022 carried over into 2023. Then, midway through 2023, we started to see a pickup—especially in technology and media.”

Scot Glover, Protiviti

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3



“Clients are facing difficulties in getting skills as people leave the industry, so they’re looking for support with workforce acquisition and retention.”

Joanne Newman, North Highland

Client priorities

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The greatest challenges facing TMT clients are financial

Figure 9

Why has your confidence been affected?

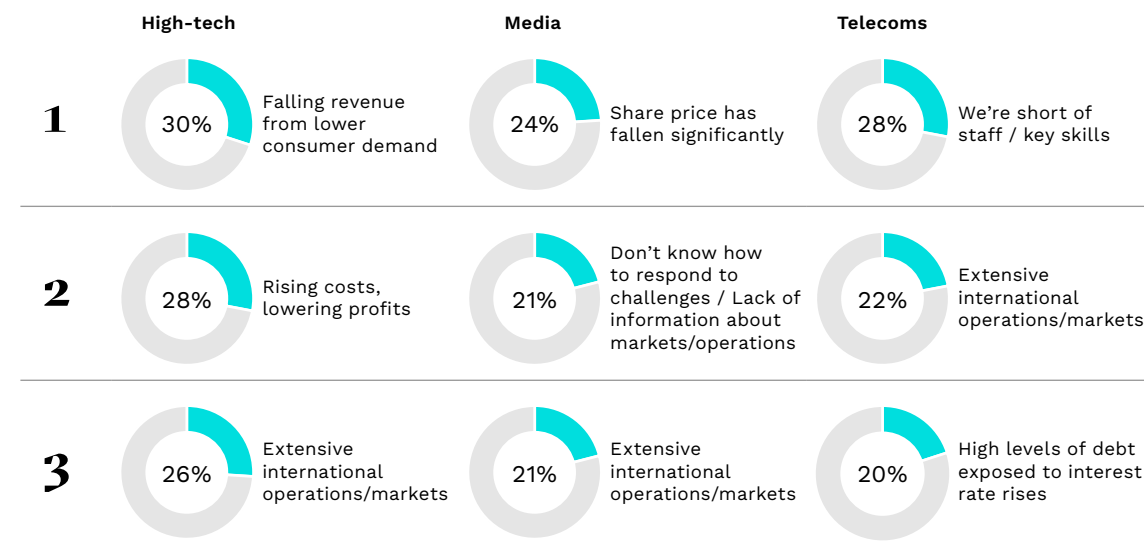


When we asked about the reasons for their reduced confidence levels, clients told us they're facing financial challenges from all sides. Their international operations are affected by the broader macroeconomic and political challenges, but in addition to this, consumer demand has declined, costs have risen, and clients are exposed to high interest rates on debts.

However, while all TMT clients are facing some financial difficulties of some kind, each sub-sector has specific nuances. High-tech clients are facing a financial squeeze on two fronts: falling revenue from lower consumer demand (affecting 30% of high-tech clients), and rising costs (28%). Media clients' woes are somewhat different, with around a quarter of clients affected by lower share price, and a general lack of information—both about how to respond to challenges but also about their own operations. Lastly, telecoms clients are facing a skills shortage, and are concerned about their debts being exposed to rising interest rates.

Figure 10

Why has your confidence been affected? By sub-sector



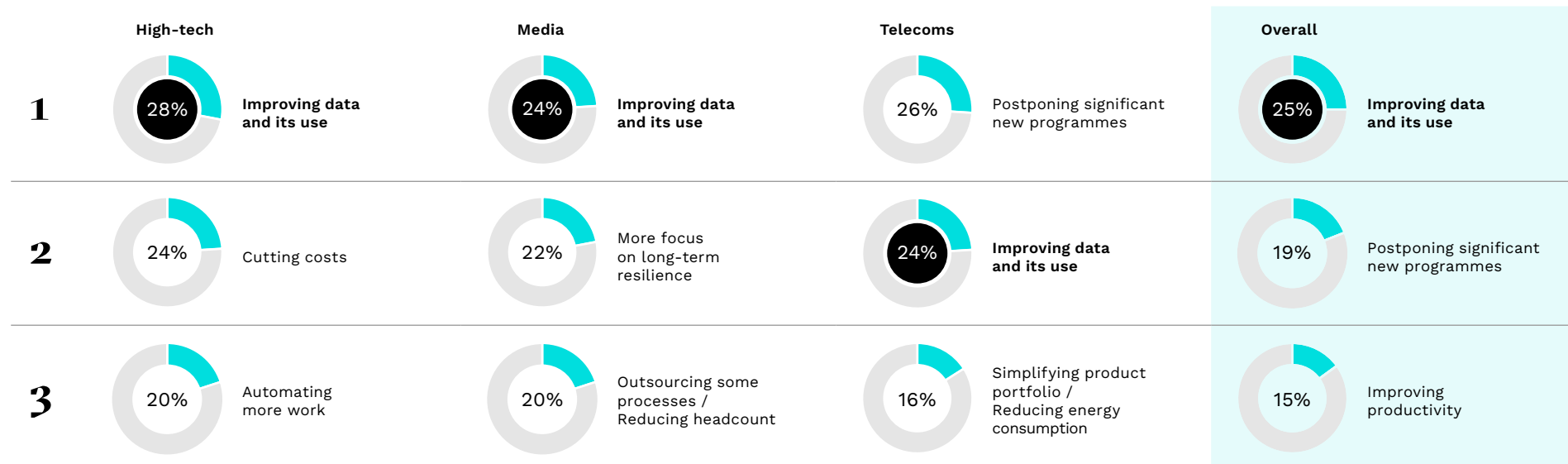
Clients understand that data will be the foundation of emerging technologies

TMT clients now understand that in order to maximise the benefit they will get from emerging technologies, they need to make sure that the underlying data that will feed it is in good order. If the foundation of data behind an AI-enabled or machine learning tool is inaccurate, incomplete, or unreliable, it will be reflected in the findings/insights that are produced. As such, improving data and its use was the single largest action taken by TMT clients to respond to the challenges they face, with 25% saying they have made strides here already. Looking by sub-sector, it is the top action for both high-tech and media clients, and the second for telecoms clients. The first action taken by telecoms clients was to postpone significant new programmes, likely in part to ensure that the output will be up to date and as futureproof as possible.

Clients are also planning to slim down their operations in a variety of ways. High-tech clients are cutting costs and automating more work, hoping to improve their balance sheets and maximise profits. Media clients are reducing headcounts and outsourcing some processes, hoping that by removing certain functions from their organisations they will save money. Telecoms clients are focusing more on simplifying their product portfolios and reducing energy consumption.

Figure 13

Which are the two most significant actions your organisation has taken to respond to current challenges (sum of 1st and 2nd actions)?



4

**“All of our projects include a
GenAI impact assessment.
That’s a must have—you can’t
develop new strategies without
integrating GenAI into it.”**

Nicolas Teisseyre, Roland Berger

Implications for firms

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Firms must be prepared to face pressure on prices

A slim majority (52%) indicated that they expect to see the prices consulting firms charge to decrease in the next year, while around a third (34%) said they expect prices to increase. This view is quite different from last year, when the majority of clients (62%) expected to see prices increase, and around a fifth (21%) expected to see prices decline.

Why? Those clients who expect lower prices do so because the work they need done is commoditised, could be offshored, or could be done by many firms. Additionally, they often need more bodies, rather than complex custom projects. This suggests that the projects that these clients are likely to hire consultants for are repeatable and relatively simple, rather than innovative and challenging. For those who think prices will rise, the opposite is true. These clients are prepared to pay more for consulting in the future because they expect cutting-edge tools to be used, and because the work they need help with is strategically very important to their businesses.

Figure 28

To what extent do you think the prices consulting firms charge you will increase or decrease over the next 12 months?

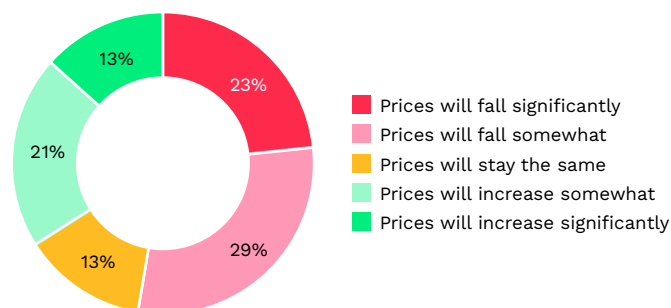


Figure 29

Why do you think prices will **decrease**?

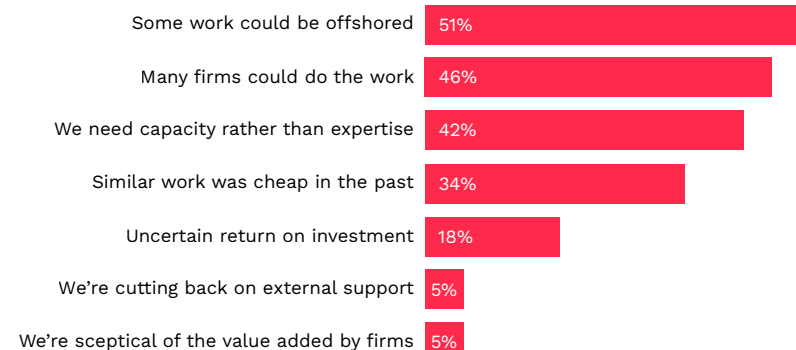


Figure 30

Why do you think prices will **increase**?



5



“The current market is challenging for consultants, with the focus shifting to digital tools and evolving delivery models.”

Mark Gibson, KPMG

Insights from consultants

Arjun Devaiah, Manager, Managed Services & Joanne Newman, Principal, North Highland.....	44
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6

“Much like the rest of the consulting industry, the TMT market experienced a bit of a slowdown in 2023, although we expect it to bounce back somewhat in 2024.”

Tony Maroulis, Source

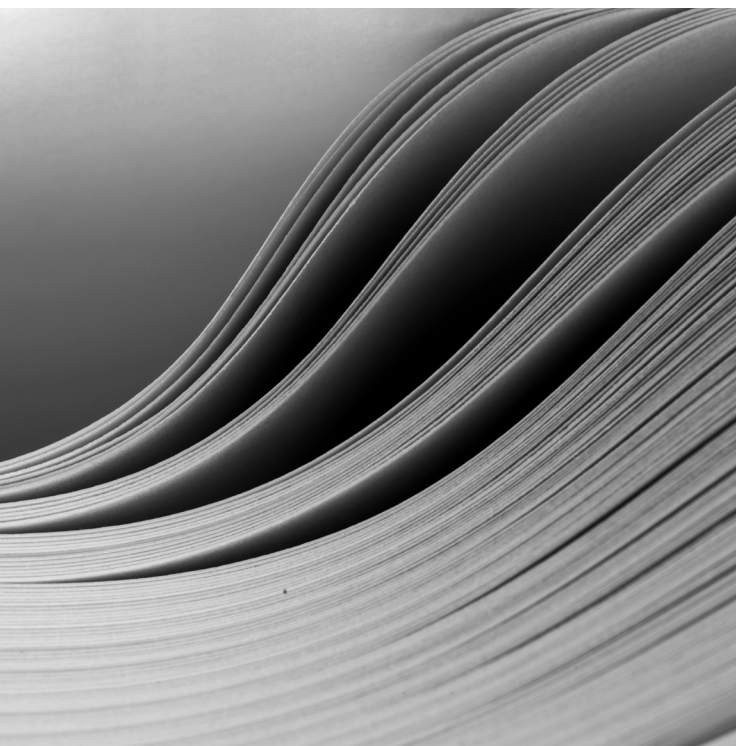
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Our approach to gathering data

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 the TMT sector are affecting clients' organisations and their use of consulting. Our survey focuses on trends in the TMT sector, providing detailed insights into the nuances of the market. For this, we surveyed 150 senior clients of consulting firms from across the TMT sector, 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.

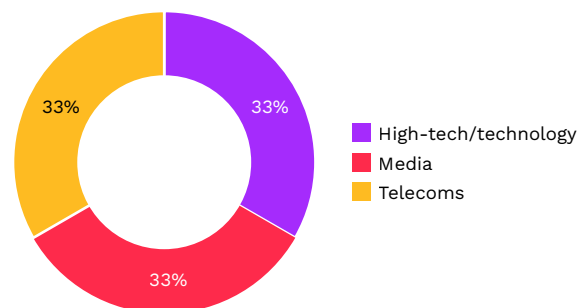
Insights from consultants

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.

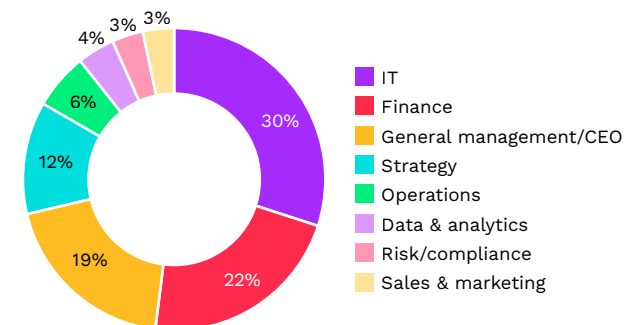
In-depth desk research

We also conducted a thorough PEST analysis in the TMT sector 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.

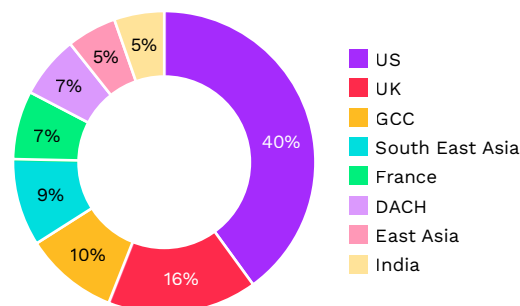
Respondents by sub-sector



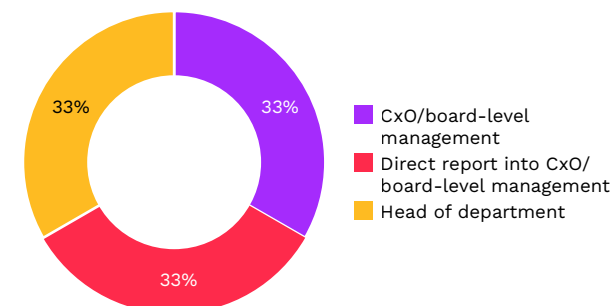
Respondents by function



Respondents by region



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).

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Mark Gibson	Global and US Technology, Media, and Telecoms Sector Leader	KPMG
Scot Glover	Managing Director, Global TMT Leader	Protiviti
Joanne Newman	Principal	North Highland
Nicolas Teisseyre	Senior Partner & Head of Global TMT	Roland Berger

Meet the expert

Tony Maroulis

Tony is a Principal Consultant in the Market Trends team. He joined Source in September 2022 and works on a range of regular and custom reports. Prior to joining Source, Tony spent a decade as an industry analyst at Ampere Analysis, leading a team of 15 analysts to market size the TMT sector. This included maintaining syndicated products, leading and delivering custom projects, speaking to journalists, and presenting at industry events.

Tony Maroulis

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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.

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