

Procurement & Spend Management

Insider

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 edburydaley

Andrew Daley, Simon Edbury and Peter Brophy





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Contributors:

We would like to thank the following for their valuable contributions to this report:

Ann Swain, CEO at APSCo

Justin Sadler-Smith, SVP Northern Europe covering UKI, Benelux, Nordics and DACH at Jaggaer

Mo Ahmad, Director, Strategic Alliances and Channel, EMEA at Tealbook

WE'VE BEEN RECRUITING SINCE THE MID 90S AND NONE OF US HAVE EXPERIENCED THESE TRENDS TO THIS EXTENT, ALL AT THE SAME TIME DURING OUR CAREERS.



“THE GROWTH IN THE DIGITAL PROCUREMENT AND SUPPLY CHAIN SECTORS ACROSS EUROPE MAKES IT ONE OF THE MOST ACTIVE ON THE CONTINENT”

1. MARKET CONDITIONS IN 2021

We have never seen a recruitment market quite like what we've seen so far in 2021.

This is in no way an exaggeration. We've been recruiting since the mid 90s and none of us have experienced these trends to this extent, all at the same time during our careers.

Demand for experienced staff across the European digital procurement ecosystem is remarkably high and growing rapidly, most notably from the software vendors. With supply seriously constrained in a number of countries and different professional disciplines, this is the most “candidate driven” job market we've ever seen.

One simple area that illustrates this is the almost complete absence of relevant candidates applying to recruitment advertising for a wide range of professional roles. Internal talent teams are particularly struggling with this development as historically it's something they have been able to rely on.

You might think you have seen a lot of people move jobs this year or know people like ex-colleagues who have moved. Indeed, there have been a lot of changes in our sector in the last year, but perhaps what you don't hear about is the number of open roles in the sector that demonstrate just how busy the market is.

There are so many companies seeking to increase their head count resulting in a great deal of choice for job seekers and intense competition for their services when they do come to the market, but in many cases that isn't happening. For example, people with strong client facing skills in disciplines like sales, presales, account management and customer success are inundated with approaches from companies looking to secure their services, but many are showing loyalty to their employers who were loyal to them during the challenges of last year. Others are enjoying record sales, and some are still understandably risk averse. When combined these factors seriously constrain the supply of qualified people to the job market.

Whilst conditions are very similar in other professional job markets, particularly in the UK which currently has a major skills shortage, the growth in the digital procurement and supply chain sectors across Europe makes it one of the most active on the continent.

Demand driven by growth from both established vendors and new entrants, many of whom have received significant private equity investment, is the key factor causing the current market dynamics. If you also factor in the rapid rise of sustainability as a major topic on the procurement agenda with new specialist vendors gaining traction as a result, as well as the growing use of spend analytics and the increasing digitisation of procurement overall, you start to understand what is causing this.

Here is some data to support this commentary from the wider job markets.

APSCO, the international professional body for the recruitment and staffing industry published its Recruitment Trends Snapshot report in September of this year with the following data for the entire UK job market:

- Permanent vacancies are up 47% year on year and are now above pre-pandemic levels
- Contract vacancies are up 79.5% year on year
- Permanent appointments are up 134% year on year and are also above pre-pandemic levels
- Recruitment companies' revenues are up 129.5% for permanent appointments and 89% for contract/interim appointments year on year
- Average permanent salaries are up 2.5% year on year

This last figure does not reflect the level of salary inflation for those moving jobs in the digital procurement and supply chain sectors with the number more like 10% based on the evidence of the moves we have been responsible for so far this year.

Cont...

THE PANDEMIC HAS MOVED PROCUREMENT AND SUPPLY CHAIN UP THE CORPORATE AGENDA LIKE NEVER BEFORE AND THERE IS CLEAR EVIDENCE THAT THIS IS ACCELERATING THE DIGITISATION OF THE FUNCTION.



“WE ARE WELL AND TRULY BACK TO A HIGHLY CANDIDATE LED MARKET WHERE DEMAND FOR PROFESSIONAL SKILLS ACROSS ALL OUR SECTORS IS CONSTANTLY OUTSTRIPPING SUPPLY”

I. MARKET CONDITIONS IN 2021 CONT...

To emphasise that point, it's worth noting that in August KPMG reported that the rate of increase in starting salaries is at its highest since they first started recording this data 27 years ago. That same report also told us that the decrease in the number of candidates in the market is at its second highest in that same period. This is consistent with our comments above.

Ann Swain, CEO of APSCo commented: “We are well and truly back to a highly candidate led market where demand for professional skills across all our sectors is constantly outstripping supply. If we look back at last year, a lot of projects and expansion plans were put on hold and with the economy now back on a growth trajectory, there is a real scramble for the skills needed to fulfil those projects and growth plans.”

Our view is that the unique world of digital procurement and supply chain is a market where these conditions are at their most acute. The pandemic has moved procurement and supply chain up the corporate agenda like never before and there is clear evidence that this is accelerating the digitisation of the function. This is clearly a key factor in the growth of the sector, particularly the increasing headcount driving the demand for people.

The Digital Procurement World event in September, which welcomed over 3,000 virtual attendees and an impressive range of speakers and sponsors that featured many of the biggest names in the sector, really illustrated the growth of this market. The event was a huge success, showcasing a number of exciting startups in the sector and brought important topics onto the broadest platform the sector has had. Like the sector itself, the event seems likely to grow and grow given the momentum that Matthias Guzmann and his team have behind them now.

So, what can you do about it? More on that subject in section 6 of this report.

THE BEST CANDIDATES ARE INUNDATED WITH APPROACHES FROM HEADHUNTERS, INTERNAL RECRUITERS AND THE LIKE, AND IN MANY CASES HAVE REACHED THE STAGE WHERE THEY ARE ONLY ENGAGING WITH PEOPLE IN THEIR EXISTING NETWORKS.



“THERE HAVE BEEN BOTH WINNERS AND LOSERS WHEN IT COMES TO THE PEOPLE WHO HAVE MOVED”

2. PROCUREMENT TECHNOLOGY - MOVES, TRENDS & PREDICTIONS

There have been too many moves to list so we will focus on those that we feel have real strategic importance for the sector due to their impact on the companies involved. There have been both winners and losers when it comes to the people who have moved.

Perhaps the most significant moves in the past six months in the UK have centred around Jaggaer. High profile industry specialist Justin Sadler-Smith joined in April to replace long standing former MD of BravoSolutions Richard Hogg. Justin's role as SVP of Northern Europe gives him responsibility for the Nordics and DACH regions as well as the UK.

Justin told us: “I moved to Jaggaer because I could see the market was demanding a best of breed procurement solution to meet the combined challenges of corporate sustainability, supply chain resilience and cost efficiencies. After significant due diligence, I concluded that Jaggaer was ideally placed to leverage its experience, product innovation and partner technology roadmap to offer a solution that fully meets the substantial requirements now being directed to the procurement function. Ultimately, it's about delivering outcomes to achieve customer success and Jaggaer has this ethos at its very core. That's the type of company that appeals to me!”

He moved quickly to strengthen his team with the important addition of Martin Hayles as Director of Alliances for Northern Europe. With a background at both Coupa and SAP Ariba, Martin is widely respected by the big consultancies and his presence will give Jaggaer a major boost as they seek to develop vital alliances with the major implementation partners.

Also joining Jaggaer as Sales Director is Simon Thompson who worked with Justin at SAP Ariba following his time at Ivalua and Proactis. His former colleague at Ivalua, Paul Rutten will join the Netherlands business later this autumn whilst Tobias Müller-Roden joins the DACH team from Basware.

In the best of breed world, exciting North American business Tealbook strengthened its fledgling EMEA business as Mo Ahmad, formerly of SAP Ariba, joined long standing industry specialist Mark Masterson.

Mo told us: “The opportunity in procurement is massive. With the analyst focus on best of breed and ecosystems, I had already started gravitating towards how ecosystems are creating innovation to further the CPO agenda and augment the suite play. This is where Tealbook is bringing some excitement to the party and the passion that Stephany Lapierre and Matt Palackdharry bring is infectious! It's a privilege to be given the trust to add to that energy and continue driving innovation through the ecosystem.”

Mo will lead EMEA alliances and, given the talk around the market, is likely to be spoilt for choice as other vendors seek to align

themselves with the business making a big noise in America. Led by CEO Stephany Lapierre, the potential of their organisation is reflected in her popularity as a speaker at the various online conferences.

In addition to those mentioned above, there have been several changes in the upper echelons of the management team at SAP Ariba as both Sean Thompson and Jason Wolf left their roles in the spring.

Coupa is actively hiring across all the major European nations as their head count in the region grows at an impressive rate. They appear to be particularly hungry for salespeople with track records in the sector, as are GEP.

Other notable moves include Alex Kleiner III, formerly one of Coupa's first hires in Europe, who has joined Fairmarkit in a new leadership role, whilst industry veteran Mark Fleming has left GEP to join Basware to lead their account management. He joins Paul Taylor who took over the Country Leadership position vacated by Justin Sadler-Smith's move to Jaggaer.

Simfoni Analytics CEO and founder Chirag Shah has been active in the market following their recent investment round, moving to take advantage of some changes at Rosslyn DataScience by hiring Mike Wigg as COO and Mark Blackwell in a sales role. Simfoni has also hired Dan Quinn from Tradeshift to lead their Emirates business and David Bush from Spend HQ as CEO for their global Spend Automation business.

In terms of what is happening in the market as we enter the final quarter of 2021, this is what we are seeing:

- Huge demand for experienced sales professionals with sector experience from the established major players, high growth best of breeds and the emerging startups. This is the case in all the major European markets and is particularly acute in the UK, Germany and France
- There is significant demand for experienced account managers and customer success and presales specialists from a very similar range of organisations
- The market for professional services specialists is also busy, particularly in the UK and Germany
- The best candidates in these areas are inundated with approaches from headhunters, internal recruiters and the like, and in many cases have reached the stage where they are only engaging with people in their existing networks.

We expect this to continue for the rest of 2021 and well into 2022 with such fertile market conditions leading to acceleration of procurement and supply chain digitalisation.

FOR BUSINESS LEADERS, HANGING ON TO YOUR BEST PEOPLE IN THE FACE OF COMPETITION HAS ALWAYS BEEN IMPORTANT BUT IT IS EVEN MORE SO NOW.



“FOR THE BIG FOUR IN PARTICULAR, A KEY CHALLENGE IS THEIR RESTRICTIONS ON SALARY BANDS AND THE FACT THAT THEY TYPICALLY DON’T LIKE TO OFFER PROMOTIONS AS PART OF A MOVE”

3. CONSULTING

There have been several very interesting moves in this area in the past six months.

Perhaps the most significant is the arrival of Steve Freshwater to join his old colleague Bob Booth at IBM as a Partner in Supply Chain, having left what might be regarded as a direct competitor in the SI world in Cap Gemini.

IBM is building a formidable team at the expense of other competitors with the likes of Tom Woodham and Andrew Smith very active in this space.

KPMG continues to be an attractive option for those immersed in the Coupa world with Inigo Lopez Ayala joining from Deloitte, again a move that sees a highly regarded professional moving to what could be seen as a direct competitor for Coupa projects. Having added Johan Torne from Accenture late last year, the team led by Andrew Underwood, Paul Desrosiers and Eniko Fulop goes from strength to strength.

Deloitte announced a number of promotions in their procurement consulting teams including Kathryn Thompson making partner - a clear sign of the importance of this sector to the business. Amongst Kathryn’s team, Fraser Woodhouse was promoted to senior manager and will play a lead role in their digital offering.

Xoomworks made a series of hires in the UK and Germany earlier in the year to support their work with Coupa in particular, whilst Accenture are advertising heavily for roles in their Ariba business. The fact that these adverts have been running for several months now and the observation made earlier about disappointing responses, reflects the challenges of hiring in this sector, even for a brand as strong as Accenture.

With PWC and EY amongst others also in the mix with niche players like Excelerated S2P, it’s an incredibly competitive area for both talent and of course new projects.

For business leaders, hanging on to your best people in the face of competition from direct competitors has always been important but it is even more so now and is reflected in the rise of counter offers for those resigning to join competitors.

For the big four in particular, a key challenge is their restrictions on salary bands and the fact that they typically don’t like to offer promotions as part of a move. However, potential candidates would ask why make a sideways move to the same grade unless there’s a significant incentive to do so, whether that be financial or otherwise. This is perhaps why big moves are less common than in the software vendors but still have a critical impact on the market.

So, the growth in the software market is reflected in the hiring activity of the consultancy businesses, who feed off the resulting transformation projects as they see their digital procurement teams as a critical part of their growth plans. In fact, one of the leading consultancies has increased headcount by well over 100% already this year in their dedicated digital procurement team.

Successful partnerships, such as the ones enjoyed by the likes of KPMG and Xoomworks with Coupa, and several businesses with SAP Ariba illustrate the growing importance of going to market in partnership. Hiring for experienced alliances specialists has been a very active area of the market so far in 2021 with companies increasingly realising that it’s a great route to market.

Some of the important job moves mentioned above will change the dynamics of the partnership world with some long-standing personal relationships an important part of the equation. With both vendors and consultants forming pragmatic alliances to win specific projects, we believe this will be a fascinating area to observe as part of the battle for overall supremacy in the market.

It will have a big impact on who provides professional services to support implementation and adoption with the consultancies often aligning themselves to the vendors that require the most support, rather than competing with in-house professional services teams. The market will be fluid and will affect the demand for people in terms of who is hiring most aggressively and who can attract the best people, but the overall demand equation for the sector will remain strong for the foreseeable future.

MANY PROFESSIONALS WITH A GENUINE PASSION FOR THE SUBJECT ARE EXCITED ABOUT WORKING FOR ORGANISATIONS WHERE THEY CAN TRULY MAKE A DIFFERENCE.



***“HIRING ACTIVITY IS INCREASING GRADUALLY AS
THE MOMENTUM IN THIS AREA GATHERS PACE”***

4. OUR NEW SECTION DEDICATED TO ESG & SUSTAINABILITY

In the growing niche of digital solutions aimed at the ESG and Sustainability markets, hiring activity is increasing gradually as the momentum in this area gathers pace. As we all know the past eighteen months has seen these subjects gain huge traction in the procurement and supply chain community so it's no surprise that the sector has seen significant investment which is fueling the growth.

For example, exciting supply chain traceability startup Circular have been particularly active in the market on the back of their Series A funding led by The Westly Group who have also invested in the likes of Tesla.

Following Paul Clayton (COO), who joined from Basware in 2020, are Daryl Owen and Fearghal Kearney where they will link up with Yue Jin Tay who worked with Paul at PA Consulting and as one of the founders of the Procsolve business acquired by Basware back in 2015. They are very active in the hiring market and will undoubtedly hire more great talent given their position in this exciting sector.

Ecovadis is perhaps the most established business in this sector and their growth continues as they hire for a wide range of roles across Europe.

Sarah Clarke, formerly of Bravo Solutions (now Jaggaer) has joined Vizibl as Chief Marketing Officer where she will bring her strong knowledge of the procurement tech sector to help them on their growth journey with their solution focused on supplier relationships. She is the highest profile of the recent additions to the team led by Mark Perera.

Elsewhere in this sector the numbers of additional headcount are relatively small in number, although high in percentage growth terms with so many emerging startups, but there is clear evidence that with so much investment coming into the sector, hiring activity will grow significantly in 2022.

The hiring market is likely to reflect the conditions observed in the wider procurement and supply chain tech sectors as demand grows at a rate that supply simply can't match.

However, we have already seen from our own work in the sector that many professionals with a genuine passion for the subject are excited about working for organisations where they can truly make a difference and this factor should enable the market leaders to attract some great talent into the sector.

THE COMPANIES THAT GET THE MOST FROM THEIR INVESTMENT IN NEW TECHNOLOGY USUALLY EMPLOY A SEASONED DIGITAL SPECIALIST WHO TYPICALLY REPORTS TO THE CPO.



“IT IS COMFORTABLY THE EASIEST AREA TO RECRUIT FOR ACROSS THE ECOSYSTEM DESPITE A RELATIVELY SMALL TALENT POOL OF PEOPLE”

5. CORPORATE MARKET - BUCKING THE TREND

For all the activity in the software vendors and their consulting partners, the corporate market for digital procurement and supply chain specialists is relatively quiet by comparison. In fact, it is comfortably the easiest area to recruit for across the ecosystem despite a relatively small talent pool of people who have experience of leading their organisations to a reasonable level of maturity.

This is because so few organisations have created such roles recently and based on our experience, we have observed that very few of these jobs go to the external market. There are examples, such as Ben Johnson joining AZ from Barclays last year, but that's the exception rather than the norm.

In the previous edition of this report published in March of this year, we noted some research by consultancy Hackett that discovered that 43% of CPOs surveyed had reported the need for roles like a “Digital Transformation Program Manager” but had yet to create them, never mind start hiring for them. And the bigger, more senior roles are even more rare.

In fact, many of the roles that do exist in this area are usually filled from internal promotions. Boot camps, training and upskilling good people are all very important and vital for the development of the profession, but we are anecdotally told by people from both consulting and vendors that the companies that get the most from their investment in new technology usually employ a seasoned digital specialist who typically reports to the CPO.

Roles where someone can be the architect of the future of digital strategy, whether that be an end-to-end platform or what Keith Hausman of Globality called a “digital garage of best of breed tools”, are few and far between. CPOs tell us: “We'd love to hire that person” but there are very few that go to the external market.

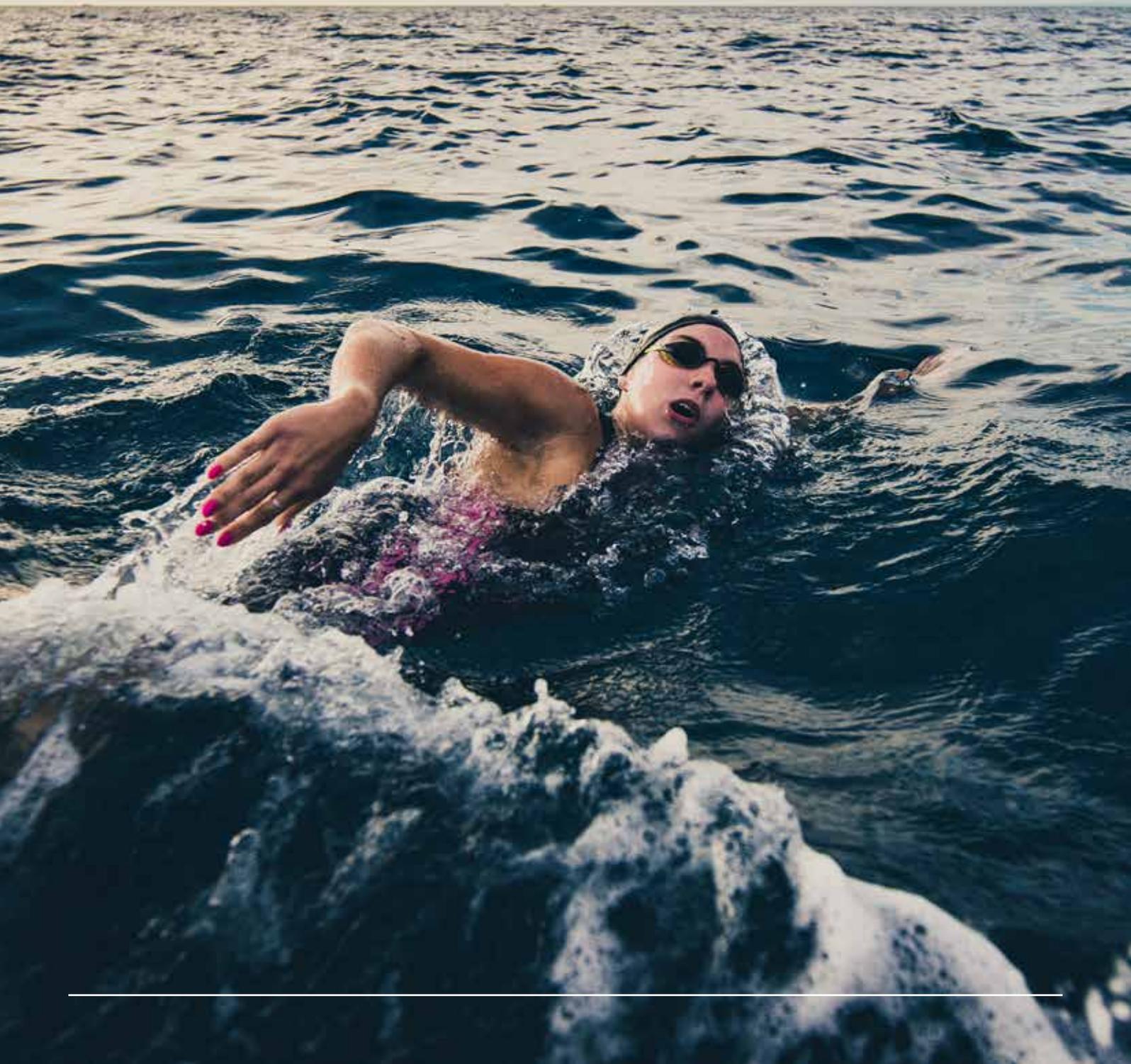
Many people who fit that description have approached us looking for such opportunities when they do eventually come to the market. There are people who have been through the entire selection and adoption process, driven the transformation and want to use that expertise in a new role. Others, often from consulting, have a different perspective but similar skills and experience and would like to take full ownership of an end-to-end process by moving in-house.

Given the relative lack of competition, CPOs should be spoilt for choice when they do go to the external market for these roles.

Bearing in mind what we are seeing in the vendor and consulting markets, it's worth noting that when the demand for these people does eventually become a trend, the strain on the already limited resources in this sector will be fascinating to observe as the supply demand equation shifts even further towards the people from the employer.

In the meantime, there is a great opportunity to hire some fantastic people for those that have big ambitions in this area in 2022.

**YOU NEED TO OFFER WHAT THE SKILLS
ARE WORTH IN THE CURRENT MARKET,
NOT WHAT YOU THINK YOU CAN GET AWAY
WITH, AS IT WILL BACKFIRE ON YOU.**



“LONG TERM RELATIONSHIPS WITH PEOPLE IN THE SECTOR ARE CRITICAL TO GAINING THEIR ATTENTION AND ENGAGEMENT WHEN CONSIDERING A CAREER MOVE, NOW MORE THAN EVER”

6. WHAT DOES ALL THIS MEAN IF YOU ARE SERIOUS ABOUT HIRING GREAT TALENT?

Here are the things you simply can't do if you are serious about hiring the best people in such a competitive market:

- Rely on recruitment advertising - the best people are being headhunted and don't have time to look at adverts
- Procrastinate with good candidates - they will go elsewhere, probably to your competitors
- Go to market without the right budgets - salaries are increasing rapidly so you need to know what the market is paying for the skills you want to hire. This is a question we have been asked more this year than any other
- Offer small salary increases - given the competition for people and the increasing prevalence of strong counter offers from current employers, small salary increases just aren't getting results
- You need to offer what the skills are worth in the current market, not what you think you can get away with, as it will backfire on you.

Here's what you need to know:

- Long term relationships with people in the sector are critical to gaining their attention and engagement when considering a career move, now more than ever
- Business leaders and the recruitment resources available to them need to be creative about how they engage with potential candidates
- Talent branding, personal reputations and position in the market are critical to securing the interest of the best potential talent
- Competition for the best people is intense. If you are serious about consistently hiring the best talent, you need to ask what is in it for the person you want to employ? Each candidate needs a personally crafted reason to join your organisation and why they should leave their current employer. For example, how will their career benefit?

Here are a few examples of what we are doing about these market conditions for our clients:

Since proven professionals from this market are not typically responding to adverts or casual approaches by internal recruiters, a highly proactive approach is needed to map and approach the best people and ultimately this means a thorough Executive Search process.

We are therefore regularly recommending a formal and thorough Executive Search process for a wider range of roles because of the need to look at a wider range of companies in the sector and to enable more creative thinking around alternative talent pools.

There are several examples of where this has been the difference maker for roles that might previously have been filled by people from our existing networks.

We have been increasingly innovative in how we approach people to get their attention about career moves, and our strong brand presence in the sector has never been more valuable to us than it has been in 2021.

We are working with our clients to plan their hiring months in advance and have been talking to people about new roles for 2022 since the summer.



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Edbury Daley places outstanding professionals in to a wide range of businesses in the key areas of Procurement, Supply Chain, Consultancy and Spend Management Technology.

Our people, our knowledge and our networks are outstanding and we are constantly challenging our clients and ourselves to recruit more effectively. We know our market and we are passionate about sharing that knowledge.

Our reputation is founded on providing consistency, professionalism and honesty in every single assignment, regardless of size. Our procurement recruitment knowledge is unrivalled and we will continue to set industry standards. Edbury Daley is the recruitment company that others aspire to.

More info at www.edburydaley.com

ABOUT THE AUTHORS



ANDREW DALEY

Andrew is one of two founding Directors and the leader of the procurement and spend management practices for Edbury Daley, a niche recruitment consultancy formed in 2005. His core strength is mid to senior level appointments in the procurement technology sector. He works internationally across a range of disciplines including sales and marketing, solution implementation, value engineering, customer success, consulting, business development and senior leadership.

He has over 20 years' experience of recruiting in the procurement world. In 2010 he began to develop a specialist SRM practice and has since had increasing success in the growing Procurement Services sector which includes spend management solutions provider

and management consultancies specialising in procurement led transformation programmes, including the deployment of spend management and data analytics tools.

He regularly publishes commentary on the employment market conditions for the procurement profession including the highly regarded Insider procurement market update, research studies and other articles on issues affecting the profession.

Andrew's career in Executive Recruitment started when he joined The PSD Group in 1995. In 1998 he was asked to take responsibility for launching the new Purchasing & Supply Chain division and has specialised in procurement ever since. He can list some of the leading professionals in

the sector amongst his regular customers and is particularly well networked across the procurement technology solutions field. He left PSD to launch a new Purchasing & Supply division for Ajilon in 2002 as Head of Practice and left in December 2004 to start the Edbury Daley business with co-Director Simon Edbury.

Andrew was educated at William Hulme Grammar School in Manchester before graduating from the University of Sheffield with an honours degree in Economics in 1993. Outside of work his time is dedicated to his family and reducing his golf handicap.

**SIMON EDBURY**

A graduate of London University, Simon has been in the recruitment industry since 1996 when he joined PSD. After six years, he joined Ajilon Executive to start a new executive recruitment team in the North West. Here he broadened his industry contacts and knowledge by working with a greater variety of clients on senior recruitment projects.

After great success within corporate recruiters, January 2005 saw Simon and Andrew establish Edbury Daley which has provided a specialist and dedicated senior level recruitment service to an ever increasing client list.

Simon is renowned for his professional, reliable and direct

approach to both clients and candidates. His no nonsense style combined with deep industry knowledge has earned him an outstanding reputation.

Outside of work he enjoys family life, playing golf and following the NFL.

**PETER BROPHY**

Peter is Associate Director at Edbury Daley and specialises in procurement and spend management following five years leading recruitment at procurement outsourcer Proxima.

He has more than 18 years' recruitment experience spanning a number of sectors including aerospace, engineering, manufacturing, professional services, lifesciences, medical devices and corporate functions such as HR, finance and procurement. As a result, he has

an extensive network of contacts across a range of functions and sectors.

He began his recruitment career in 1996 at MRI / Humana, a niche executive search specialist. In 2000 he moved in-house to head-hunt a new management team for Manpower, and then led a complete transformation of the recruitment process at Rolls-Royce plc, working closely with procurement to restructure the recruitment supply chain. He then joined BDO Stoy Hayward

to head up its resourcing team, before moving to Proxima in 2009.

Peter is a Fellow of the Chartered Institute of Personnel and Development and has a master's degree in Human Resource Management, as well as a degree in Geography.

Outside of work he has two sons, is a long suffering Newcastle United supporter and is a keen walker.



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Andrew Daley
Director
07711 715258
andrew@edburydaley.com

Simon Edbury
Director
07946 577145
simon@edburydaley.com

Peter Brophy
Associate Director
07908 440520
peter@edburydaley.com

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info@edburydaley.com
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