Everest Group
RESEARCH

Global Locations Annual Report 2016: Persistent Growth in Uncertain Times

Locations Insider™

Annual Report: October 2016 – Preview Deck

EGR-2016-2-PD-1957

Our research offerings for global services

- **Market Vista™**
  Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

BFSI[1] Information Technology	PricePoint™
BFSI[1] Business Process	Finance & Accounting
Healthcare & Life Sciences ITS	Procurement
Healthcare & Life Sciences BPS	Human Resources
Application & Digital	Recruitment & Talent Acquisition
Cloud & Infrastructure	Contact Center
Global Sourcing	Service Optimization Technologies
Locations Insider™	Transaction Intelligence

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- The full report is included in the following subscription(s)
  – Locations Insider™ (LI)
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**

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1 Banking, financial services, and insurance

Table of contents (page 1 of 2)

Everest Group RESEARCH

Table of contents (page 2 of 2)

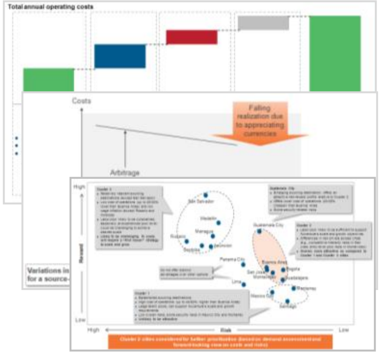
Everest Group RESEARCH

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Based on on-the-ground perspectives

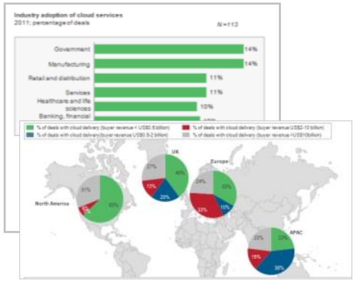
1

Robust definitions and frameworks
(talent pool scalability and sustainability assessments, cost arbitrage sustainability, risk assessment frameworks)



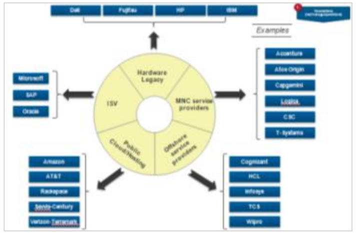
2

Primary sources of information
(Ongoing interactions with buyers, GICs/captives/SSCs, service providers, investment promotion agencies, recruiters, etc.)



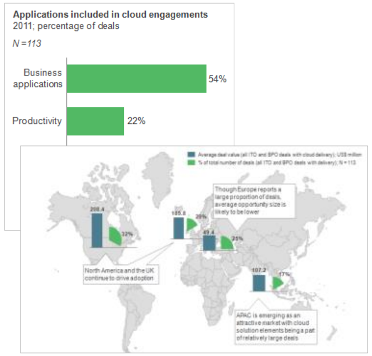
3

Diverse set of market touchpoints
(Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership)



4

Fact-based research
(Data-driven analysis with expert perspectives, year-round tracking of location and service provider activity, and country briefings)



- Proprietary tracking and databases on operating costs, labor pool, market activity, and risks
- Year-round tracking of 250+ locations around the world
- Coverage across all offshore, nearshore, and onshore locations across regions (APAC, Europe, North America, LATAM, Africa)
- Over 100 global projects on supporting clients on location decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

Our ability to deliver insight on locations is based on extensive databases and ongoing market research

Market activity database

No.	Company name	Parent industry vertical (primary)	Time since inception	IT (ADM and Infra)	BPO	KPO	CC	Engineering, R&D	Comments on services offered	FTE estimates (date variable)
1	3Com	Telecom and hi-tech	<3 yrs					✓	Software development	100
2	ABB	Manufacturing	3-5 yrs					✓	Software development &	500
3	ABN Amro	BFSI	3-5 yrs	✓	✓		✓		Banking transaction	2000
4	Adobe	Telecom and hi-tech	>5 yrs					✓	R&D	600
5	Agilent technologies	Telecom and hi-tech	<3 yrs		✓			✓	Application and SOC Chip design,	1000
6	Airwide solutions	Telecom and hi-tech	<3 yrs					✓		100
7	Akzo Nobel Car Finishes	Others	3-5 yrs					✓	develop products and colour	NA
8	Allianz Cornhill	BFSI	3-5 yrs	✓	✓		✓		IT application development and	500
9	Alsthom	Manufacturing	<3 yrs					✓	Engineering and design services,	1,000
10	Amazon	Telecom and hi-tech	<3 yrs				✓	✓	Software Develoment,	NA
11	AMD	Telecom and hi-tech	<3 yrs					✓	design	120
12	American Express	BFSI	>5 yrs		✓	✓	✓		F&A back-office HR processing,	3,000
13	AOL	Telecom and hi-tech	3-5 yrs				✓	✓	Contact center , software	1,650

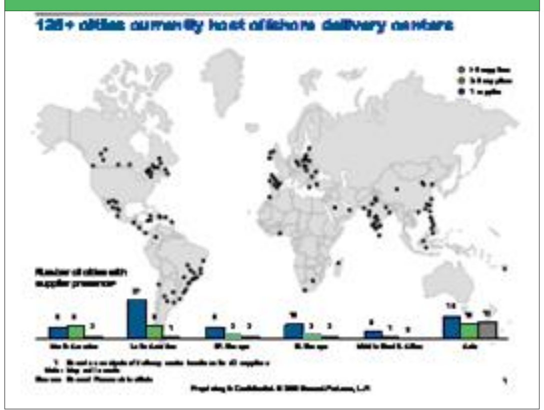
Cost database

City profile : Bangalore - Call centre

Salary costs (US$ p.a.)		Reliability
Base salary - call center agent	3,043	Medium
Gross salary - call center agent	3,408	Medium
Base salary - call center supervisor	5,180	Medium
Gross salary - call center supervisor	5,802	Medium
Base salary - call center manager	21,725	Medium
Gross salary - call center manager	24,332	Medium
Base salary - call center COO	73,021	Low
Gross salary - call center COO	81,783	Low

Education		Reliability
Number of university graduates pa	71,335	Low
Number of high-school graduates pa	-	-

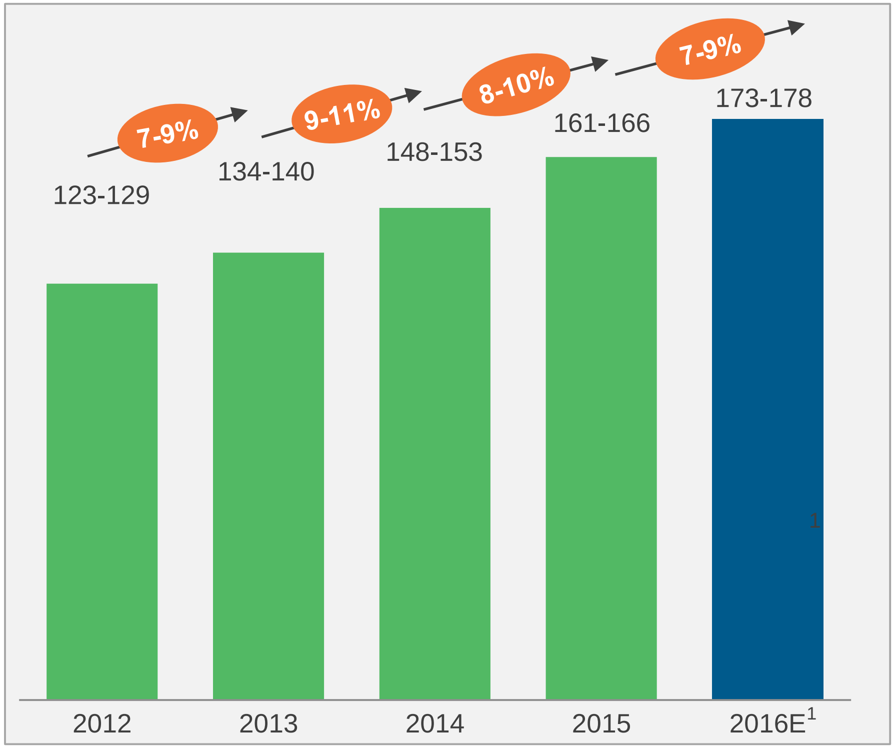
GIC/SSC database



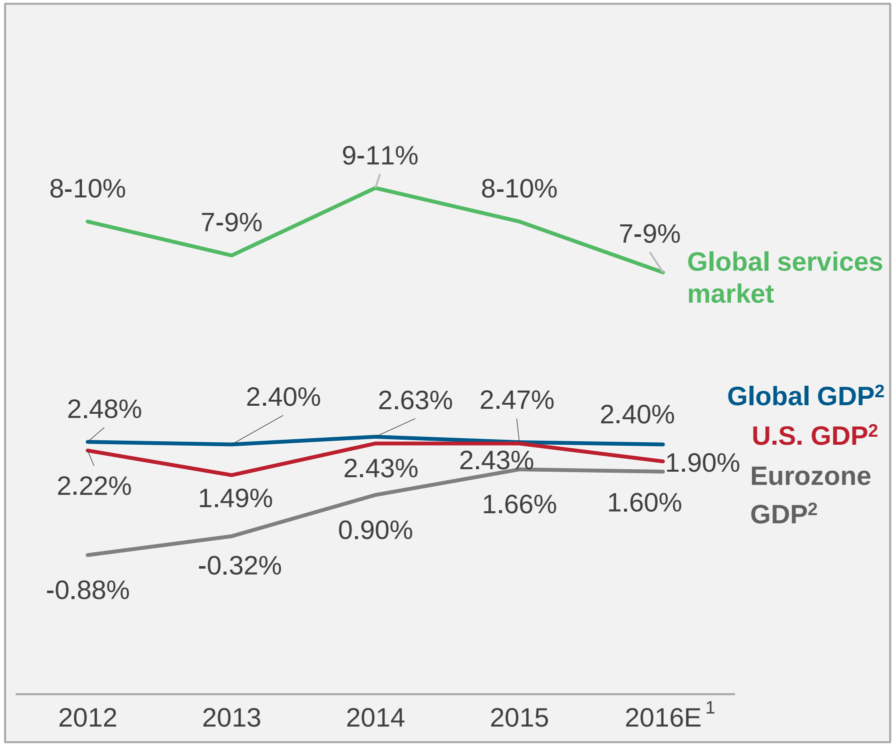
Industry leading databases (100+ service providers, ~2,000 GICs / Shared service centers, and 200+ cities)

The global services market is expected to witness slower growth than in 2015 due to volatile macroeconomic environment and investment markets

Global services revenue and growth
2012-2016(E); US$ billion



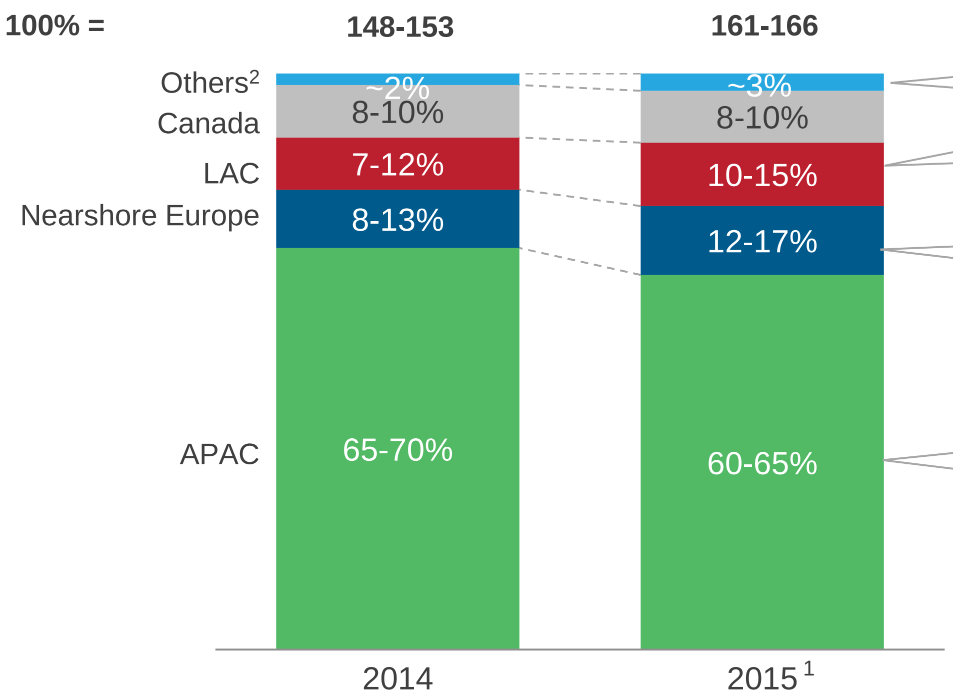
Growth rates of regional/global GDP and global services market
2012-2016(E)[1]; Percentage[2] (E)



1 Estimated figures for the year 2016
2 Data for constant year-on-year (YOY) prices, based on purchasing power parity
Note: Includes global services exports; excludes domestic market
Source: Country- / city-level investment promotion agencies, global services organizations (buyers, global in-house centers, and service providers), and Everest Group (2016)

The share of Asia Pacific region has declined marginally since 2014 while Nearshore Europe and Latin America & Caribbean have increased their relative shares in the world revenue

Global services market | Share of delivery regions by revenue
2014-2015[1]; US$ billion



The share of Middle East and African countries (particularly Morocco and Egypt) is steadily increasing

Mexico, Argentina, and Brazil constituted the top three delivery locations in Latin America

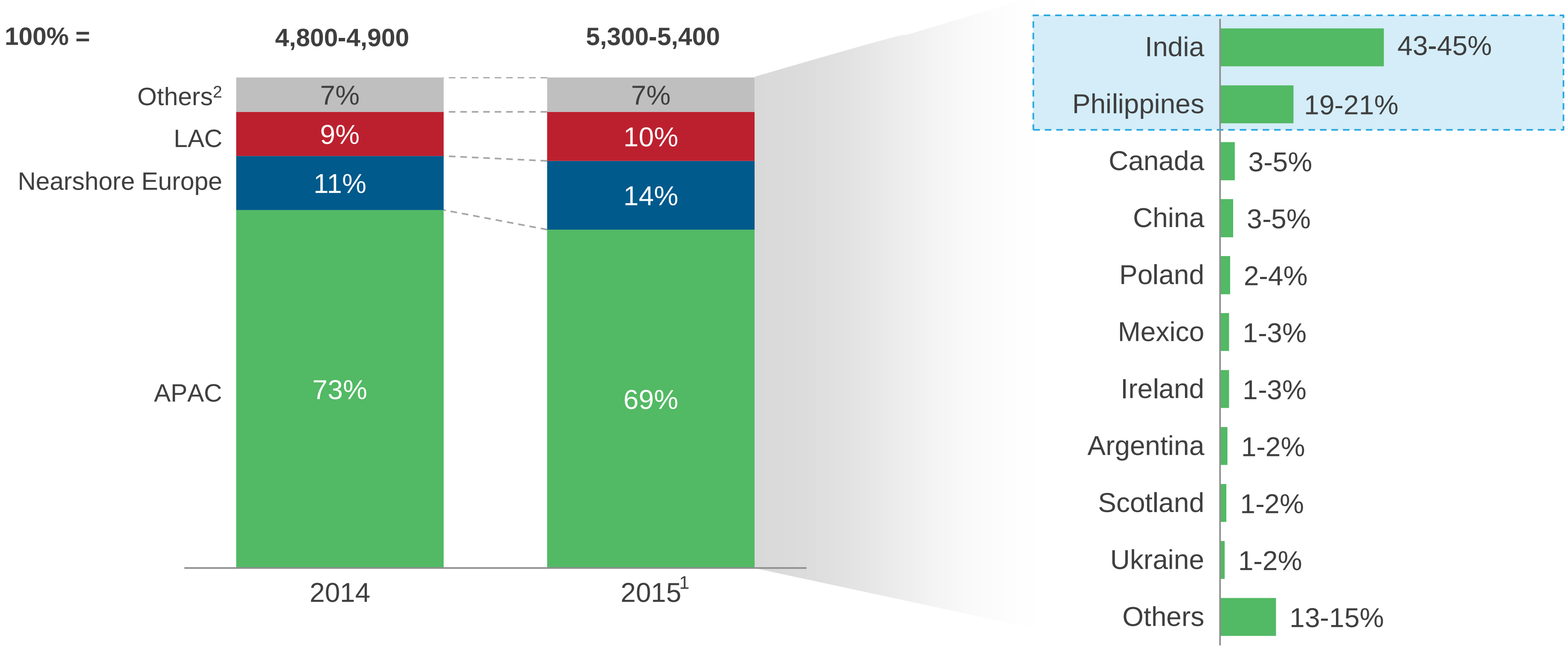
Ireland, Poland, and Scotland are the top delivery locations, followed by Ukraine, Czech Republic, and Hungary

India and the Philippines continue to account for a mammoth share of APAC's revenue (>70%); China is the third largest country in terms of revenue share

1 Indicates end of 2015
2 Others include Middle East & Africa
Note: Includes global services exports; excludes domestic market
Source: Country- / city-level investment promotion agencies, global services organizations, and Everest Group (2016)

India and the Philippines continue to have the largest share of headcount, both within Asia Pacific and globally

Global services market | Share of delivery regions by headcount
2014-2015[1]; Number of FTEs (in '000s)



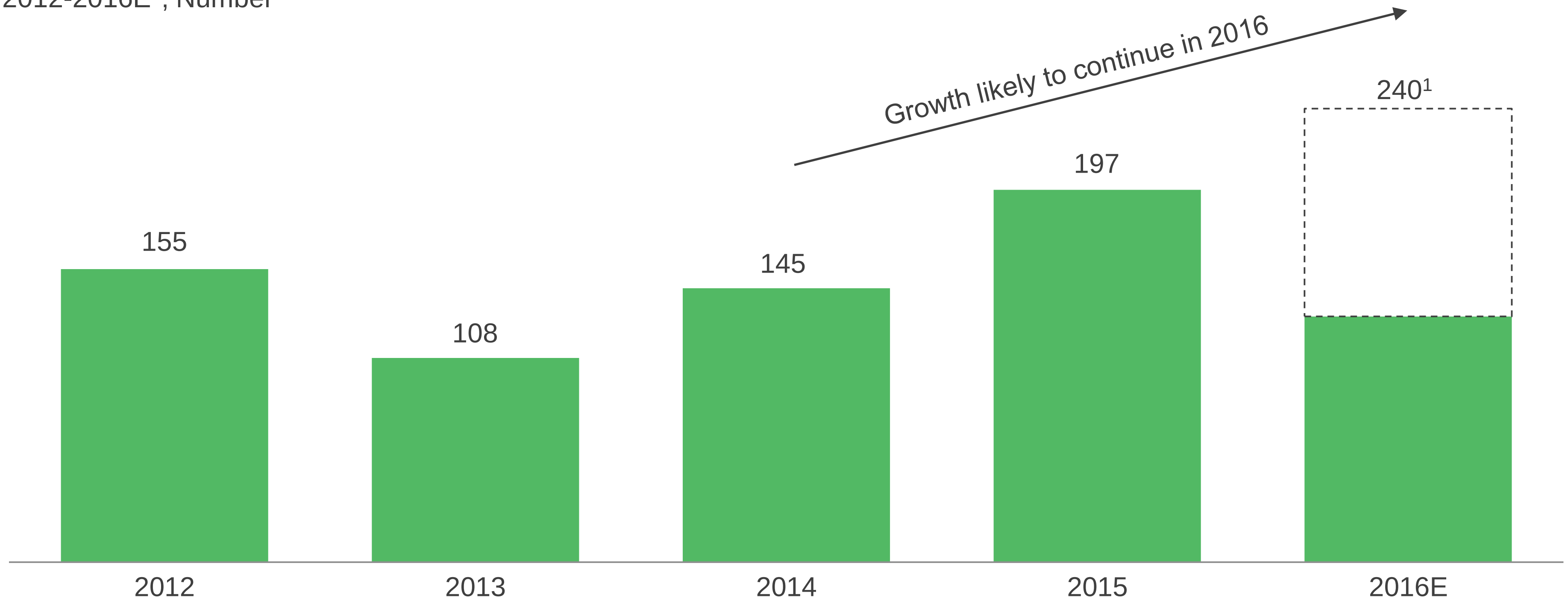
1 Indicates end of 2015
2 Others include Canada, Africa, and the Middle Eastern region
Note: Includes global services exports for 35 leading locations. Excludes domestic market
Source: Country- / city-level investment promotion agencies, global services organizations, and Everest Group (2016)

Location heatmap

Source: Country- / city-level investment promotion agencies, global services organizations, and Everest Group (2016)

The trend of increasing center setup activity continued in 2015; similar growth rates are expected in 2016 as well

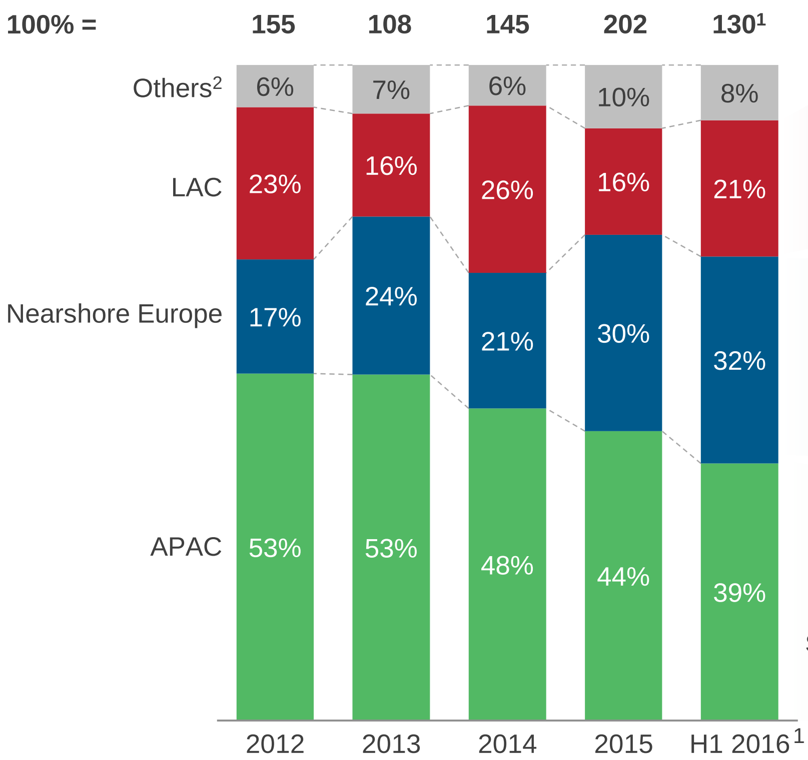
New centers established
2012-2016E[1]; Number



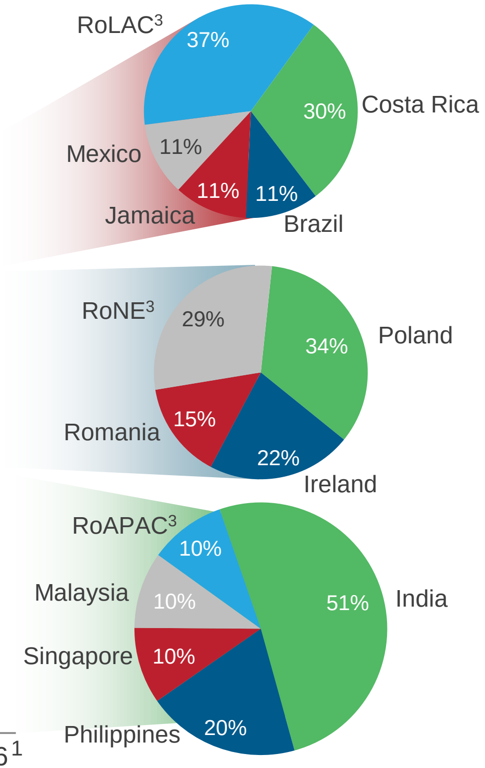
1 Expected number of new centers established during 2016; It is expected that center setup activity will grow by ~22% in 2016
2 Compounded Annual Growth Rate from 2012 to 2015
3 Includes data for Q1 2016 (January-March 2016) and Q2 2016 (April-June 2016)
Note: Includes global in-house centers and (third-party) service provider delivery centers
Source: Everest Group (2016)

Asia Pacific has witnessed a consistent decline in its share since 2012 while Nearshore Europe stepped up to maintain its position as the second largest region for delivery centers

Breakup of new centers by region
2012-H1 2016[1]; Percentage



Breakup of new centers by country
H1 2016[1]; Percentage



1 Includes data for Q1 2016 (January-March 2016) and Q2 2016 (April-June 2016)
2 Includes activity recorded in the Middle East and Africa region
3 RoAPAC = Rest of APAC; RoNE = Rest of Nearshore Europe; RoLAC = Rest of LAC
Note: Includes global in-house centers and (third-party) service provider delivery centers
Source: Everest Group (2016)

Locations activity | Summary of key trends

1 Functions supported

- Share of IT services has increased considerably since 2013, while the share of both voice and non-voice business process services has dropped
- Knowledge processes as well as engineering and R&D have maintained their share

2 Type of city (tier-1 and tier-2/3 cities)

- Increasing instances of players leveraging tier-2/3 locations, particularly across the nearshore European region; although this movement continues to be muted in Asia Pacific
- In terms of new delivery center setups, the Middle Eastern and African region has the highest proportion of tier 2/3 cities followed closely by Latin America & the Caribbean; most of this movement is driven by service providers rather than GICs

3 GICs and service providers

- Both GIC and service provider setups witnessed an increase during 2015-H1 2016, however, service providers grew at a faster rate, reaching a new high since 2012
- Nearshore Europe, in particular, witnessed increase in activity by service providers during 2015-H1 2016

4 Type of provider

- Share of top 20 service providers1 in the new service provider setups increased across the Nearshore European region, whereas Asia Pacific and Middle East & Africa witnessed a considerable decline

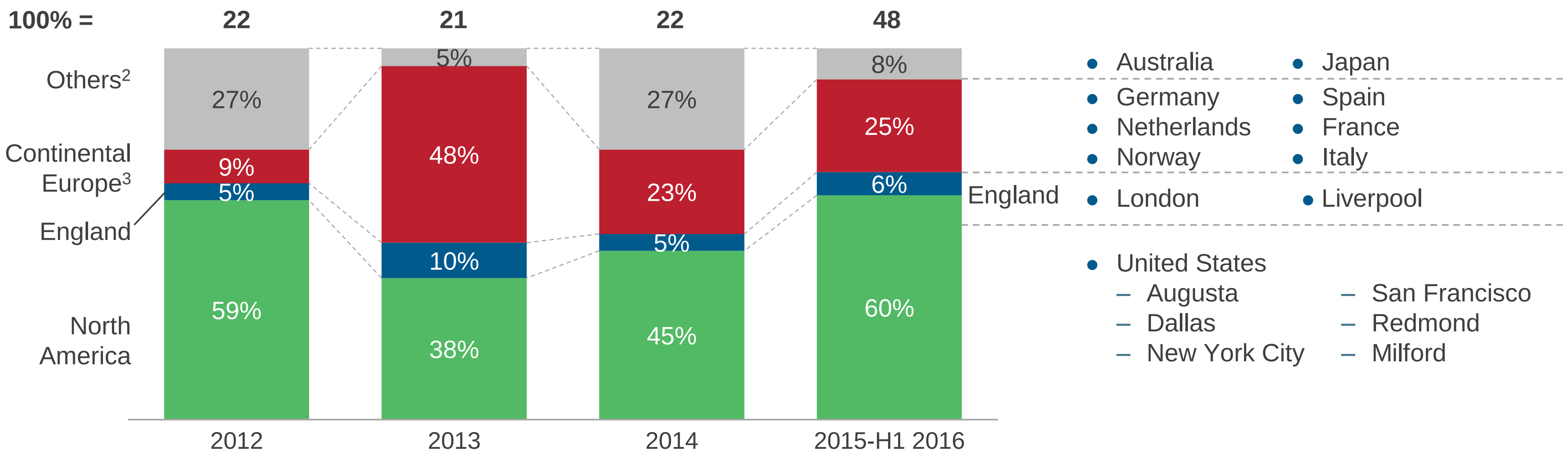
5 Onshore geographies[2]

- Increasing investments by top 20 service providers[1] in onshore locations
- North America witnessed a spurt of growth in new onshore setups by top 20 providers[1] after a period of slow activity during 2013 - 2014

1 20 leading service providers across IT and BPS that Everest Group uses as “Index” providers to gauge market trends
2 Includes United Stated, United Kingdom, Western Europe, Nordics, Australia, New Zealand, and Japan
Source: Everest Group (2016)

The share of the United States increased in onshore center setups by the top 20 service providers since 2013 with European locations taking second place

New onshore delivery centers of top 20 service providers[1] by region
2012-H1 2016[3]; Number of centers



1 20 leading service providers across IT and BPS that Everest Group uses as “index” providers to gauge market trends
2 Includes Australia, Japan, and New Zealand
3 Also includes Nordic and Scandinavian countries
4 Includes data for Q1 2016 (January-March 2016) and Q2 2016 (April-June 2016)
Source: Everest Group (2016)

MAP Matrix™ | Definition and key components

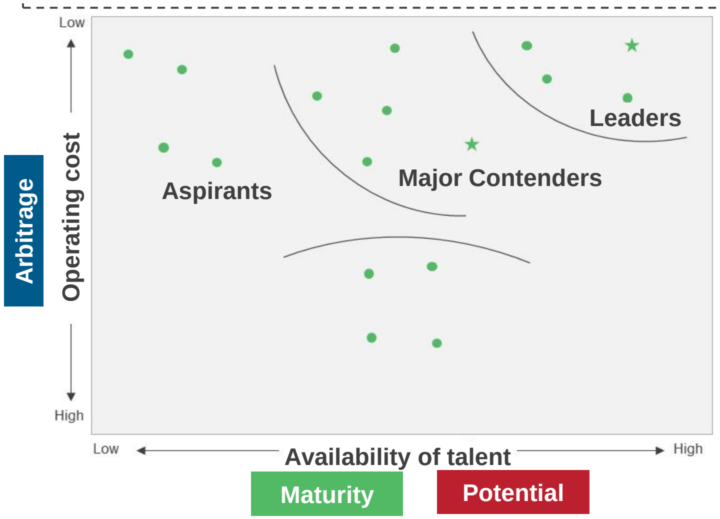
Everest Group's **Maturity | Arbitrage | Potential (MAP) Matrix™** provides a comparative assessment of cities specific to a function

Maturity
- Relative maturity of locations in terms of the breadth and depth of services offered

Arbitrage
- Cost savings or arbitrage over typical source markets

Potential
- Emerging opportunities or potential of these locations from a talent and risk standpoint

MAP Matrix™ assessment covers 80+ cities for the following functions:
- Information Technology – Application Development and Maintenance (IT-ADM)
- Contact center (English language)
- Transactional Business Process Services (BPS)
- Complex / judgment-intensive BPS
- Bilingual (Spanish and English language) BPS
- Multi-lingual (European languages) BPS
- Analytics
- Digital
- Engineering Services and Development (ER&D)
- IT services in the United States of America



Leaders
- Relatively the most attractive locations - significant talent availability and low costs
- Characterized by presence of large GICs or service provider centers
- Often exhibit high competitive intensity owing to presence of many large players

Major Contenders
- Offer an attractive mix of talent availability and cost savings
- Sufficient talent pool to support mid- to large-sized centers
- Lower competitive intensity compared to Leaders, however, lower maturity

Aspirants
- Suitable for small- to medium-sized centers
- Offer early-mover advantage and low costs, however, require investments in talent development
- Typically, less mature locations as compared to other clusters

☆ **Star Performer**
- Locations that witnessed significant new center setup activity in the past one year

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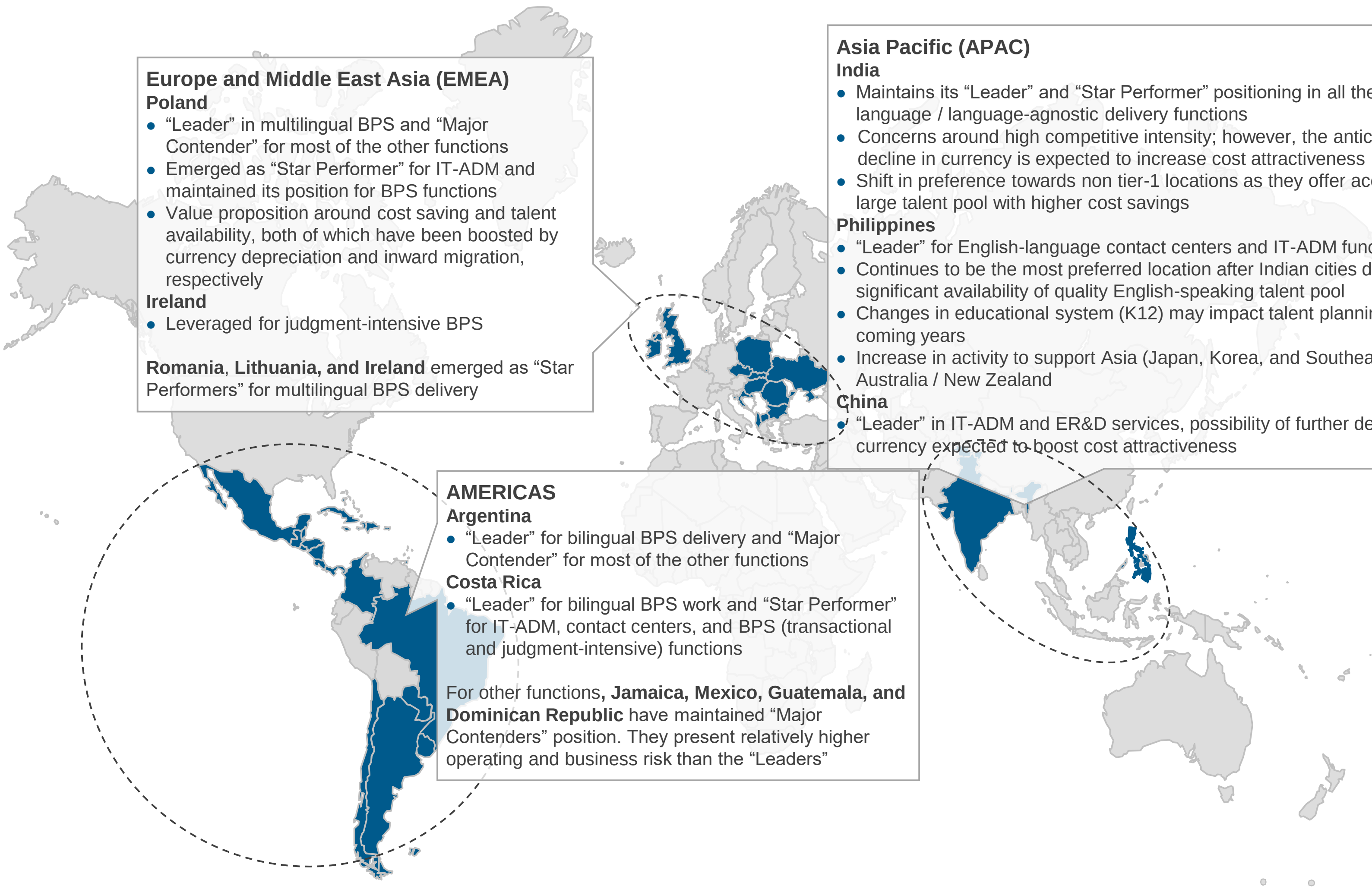
MAP Matrix™ | Summary of key messages



Europe and Middle East Asia (EMEA)

Poland

- "Leader" in multilingual BPS and "Major Contender" for most of the other functions
- Emerged as "Star Performer" for IT-ADM and maintained its position for BPS functions
- Value proposition around cost saving and talent availability, both of which have been boosted by currency depreciation and inward migration, respectively

Ireland

- Leveraged for judgment-intensive BPS

Romania, **Lithuania, and Ireland** emerged as "Star Performers" for multilingual BPS delivery

Asia Pacific (APAC)

India

- Maintains its "Leader" and "Star Performer" positioning in all the English language / language-agnostic delivery functions
- Concerns around high competitive intensity; however, the anticipated decline in currency is expected to increase cost attractiveness
- Shift in preference towards non tier-1 locations as they offer access to a large talent pool with higher cost savings

Philippines

- "Leader" for English-language contact centers and IT-ADM functions
- Continues to be the most preferred location after Indian cities due to significant availability of quality English-speaking talent pool
- Changes in educational system (K12) may impact talent planning in the coming years
- Increase in activity to support Asia (Japan, Korea, and Southeast Asia) and Australia / New Zealand

China

- "Leader" in IT-ADM and ER&D services, possibility of further decline in currency expected to boost cost attractiveness

AMERICAS

Argentina

- "Leader" for bilingual BPS delivery and "Major Contender" for most of the other functions

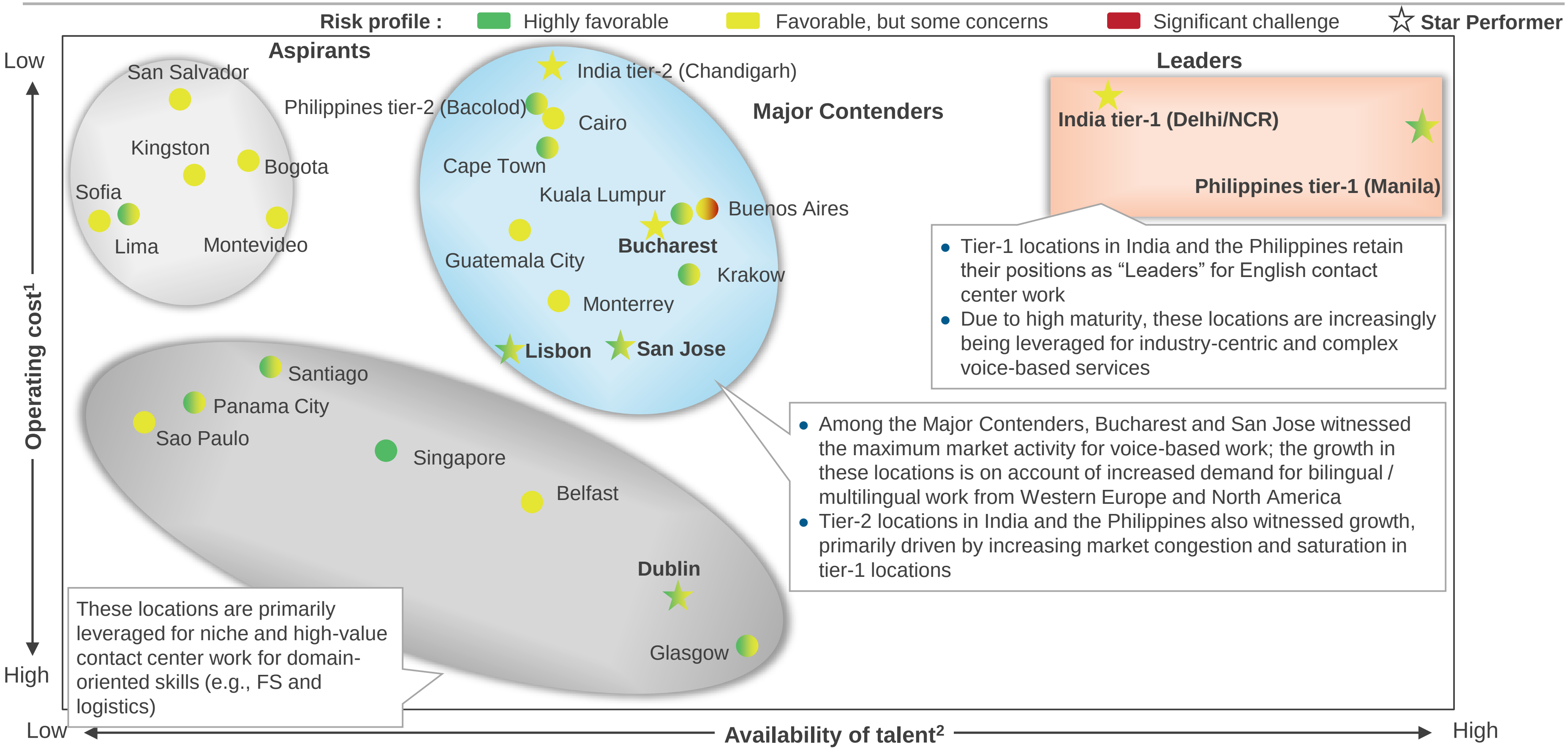
Costa Rica

- "Leader" for bilingual BPS work and "Star Performer" for IT-ADM, contact centers, and BPS (transactional and judgment-intensive) functions

For other functions**, Jamaica, Mexico, Guatemala, and Dominican Republic** have maintained "Major Contenders" position. They present relatively higher operating and business risk than the "Leaders"

Source: Everest Group (2016)

MAP Matrix™ | Contact Center (English)

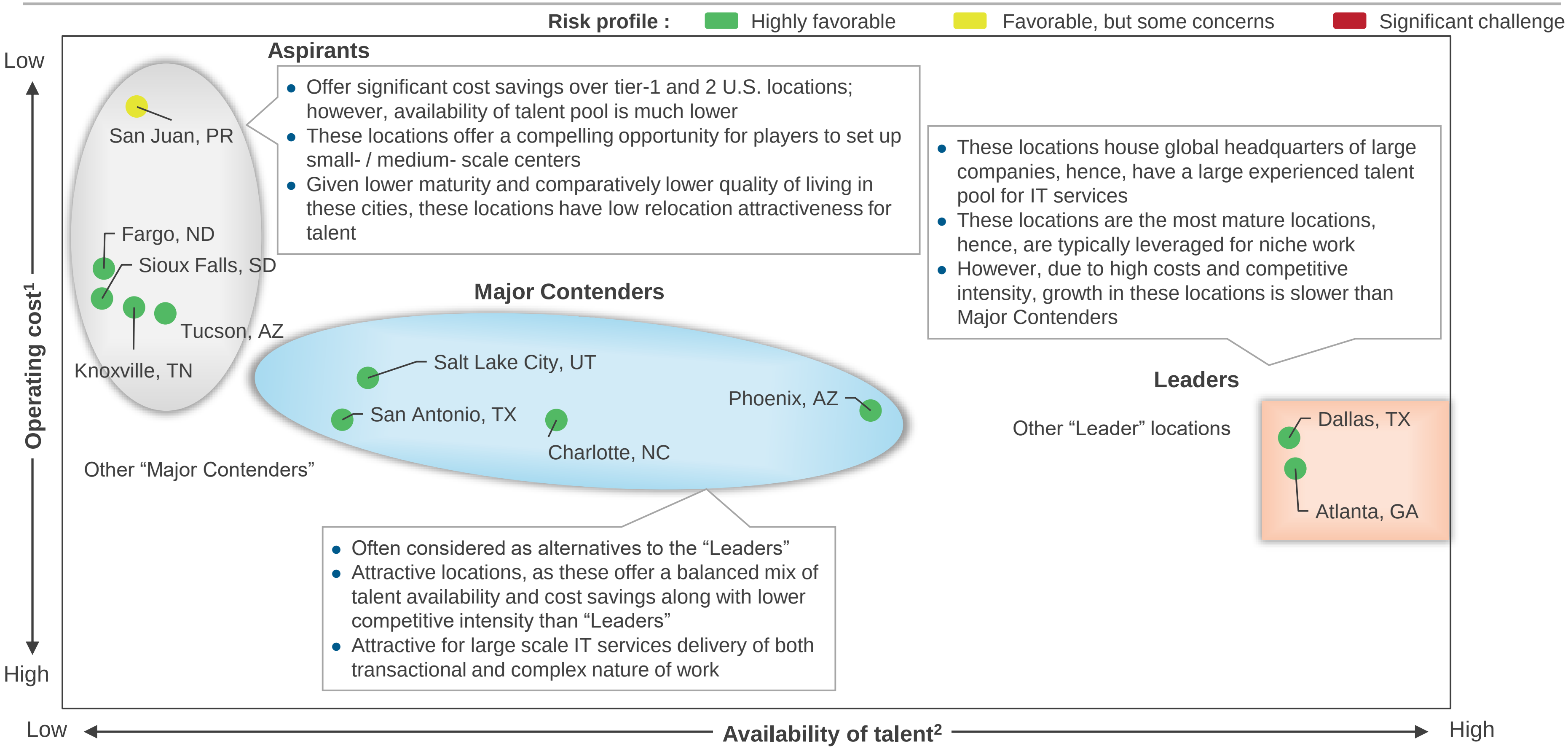


1 Fully-loaded, ongoing operating cost including compensation, facilities, and technology expenses
2 Considers relevant entry-level and experienced talent
3 The assessment has been done only for a representative list of locations

Note: We used representative cities to depict typical talent-cost positioning for tier-1 and tier-2 cities for some countries (e.g., Metro Manila as a tier-1 city and Bacolod as a tier-2 city in the Philippines); there could be other cities in the country that also offer comparable propositions to these cities

Source: Inputs from market players, recruitment firms, and investment agencies; Everest Group (2016)

MAP Matrix™ | IT Services in the United States of America

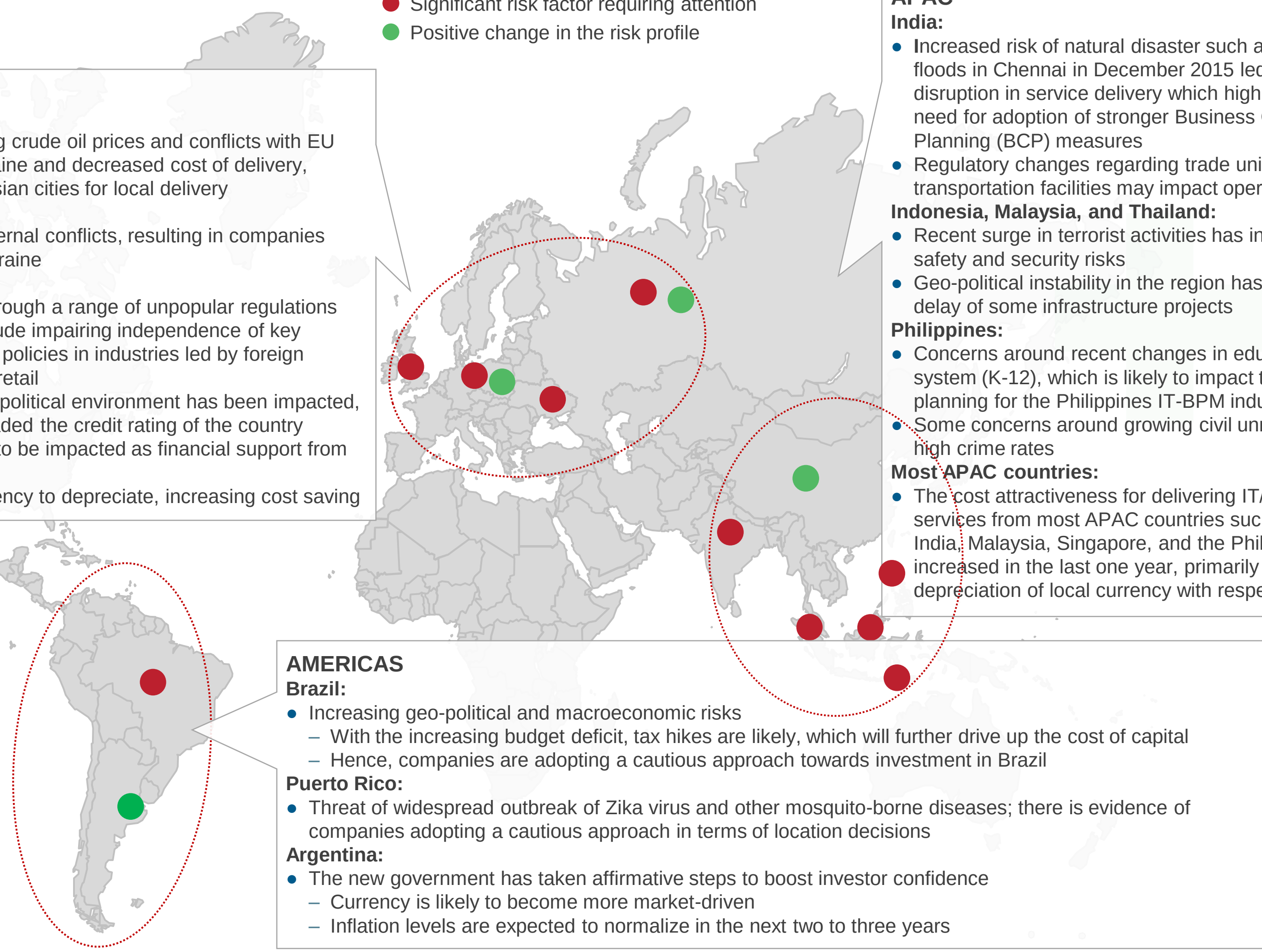


In addition to the cities listed above, companies also leverage tier-1 U.S. cities such as Chicago, Boston, and New York for delivery of IT services

1 Fully-loaded, ongoing operating cost including compensation, facilities, and technology expenses
2 Considers relevant entry-level and experienced talent
3 The assessment has been done only for a representative list of locations
4 There are other cities in each of these clusters that are being leveraged for delivering IT Services work; these cities are listed on the next page

Source: Inputs from market players, recruitment firms, and investment agencies; Everest Group (2016)

Risk watch | Summary of key messages



EMEA

Russia:
- Economic concerns due to falling crude oil prices and conflicts with EU
- Due to the ongoing crisis in Ukraine and decreased cost of delivery, companies are considering Russian cities for local delivery

Ukraine:
- Unstable environment due to internal conflicts, resulting in companies looking to shift centers out of Ukraine

Poland:
- New government has pushed through a range of unpopular regulations and policies, some of which include impairing independence of key institutes, and discriminatory tax policies in industries led by foreign players, especially banking and retail
- Overall macroeconomic and geopolitical environment has been impacted, as key institutions have downgraded the credit rating of the country
- Infrastructure projects are likely to be impacted as financial support from EU may be cut down post Brexit
- Brexit has caused the local currency to depreciate, increasing cost saving

APAC

India:
- Increased risk of natural disaster such as the floods in Chennai in December 2015 led to disruption in service delivery which highlighted the need for adoption of stronger Business Continuity Planning (BCP) measures
- Regulatory changes regarding trade unions and transportation facilities may impact operations

Indonesia, Malaysia, and Thailand:
- Recent surge in terrorist activities has increased safety and security risks
- Geo-political instability in the region has led to delay of some infrastructure projects

Philippines:
- Concerns around recent changes in educational system (K-12), which is likely to impact talent planning for the Philippines IT-BPM industry
- Some concerns around growing civil unrest and high crime rates

Most APAC countries:
- The cost attractiveness for delivering IT/BP services from most APAC countries such as China, India, Malaysia, Singapore, and the Philippines increased in the last one year, primarily due to depreciation of local currency with respect to US$

AMERICAS

Brazil:
- Increasing geo-political and macroeconomic risks
  - With the increasing budget deficit, tax hikes are likely, which will further drive up the cost of capital
  - Hence, companies are adopting a cautious approach towards investment in Brazil

Puerto Rico:
- Threat of widespread outbreak of Zika virus and other mosquito-borne diseases; there is evidence of companies adopting a cautious approach in terms of location decisions

Argentina:
- The new government has taken affirmative steps to boost investor confidence
  - Currency is likely to become more market-driven
  - Inflation levels are expected to normalize in the next two to three years

Source: Inputs from market players, recruitment firms, and investment agencies; Everest Group (2016)

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The report has 68 pages of data on locations activity – new centers set up by GICs and service providers over 2015-H1 2016

Locations activity

Offshore locations | Delivery centers established in Q1 2015 (page 1 of 10)

Asia

Country	City	Month	Service provider / GIC
India	Bengaluru	January	Capgemini
India	Bengaluru	January	Cargill Inc.
Indonesia	Jakarta	January	Islamic Development Bank (IDB) Group
Hong Kong	Hong Kong	January	Accenture
Taiwan	Kaohsiung	January	Wistron

Locations activity

Offshore locations | Delivery centers established in Q2 2015 (page 1 of 10)

Asia

Country	City	Month	Service provider / GIC	Headcount	Function	Other comments
India	Bengaluru	April	Morgan Stanley	500 FTEs	BP – industry-specific	Opened a new back-office to provide support services to its global business units. The center is similar to the company's Mumbai facility, which helps the firm's global operations on technology, operations, finance, fund services, compliance, and other specialized functions. The center has a seating capacity of 1,400 FTEs
India	Bengaluru	April	Twitter	25 FTEs	R&D / engineering	Twitter acquired and converted ZipDial's office in Bengaluru, India, into its engineering center. The center will contribute to Twitter's global product engineering and will employ software engineers
India	Bengaluru	April	VMware	N/A	R&D / engineering	Opened a new R&D center with an investment of US$120 million. The facility will cater to the global R&D of VMware's mobile and cloud solutions and plans to hire 250 FTEs by the end of 2015
India	Hyderabad	April	Ashland Inc.	120 FTEs	BP – HR, legal, and analytics and IT	Established a global business services center to support its global operations. The new facility will have functions such as information technology, legal, human resources, financial analytics, and product planning
India	Hyderabad	April	Avaya	80 FTEs	R&D / engineering	Opened its third R&D center via the acquisition of KnoahSoft, a workforce optimization provider and also a provider of call recording, quality, and performance management software. The facility is similar to its existing R&D centers in Bengaluru and Pune. KnoahSoft's employees were moved to Avaya

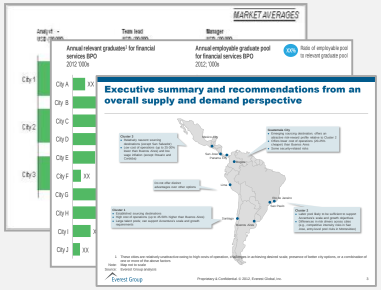
Source: Everest Group (2016)

Everest Group's Locations Insider subscription provides detailed information, analysis, and perspectives on global locations through multiple types of reports

Function focus location reports
*Identify and assess **function-specific** growth opportunities in **regions***

3 reports per year

- Comparative analysis of cities in a region for a specific function (e.g., IT-ADM, customer service)
- Comparison of cities on:
  - Operating costs
  - Talent pool
  - Key players
  - Risks
  - Future outlook



Emerging location trends
*Keep up with the **latest themes** in location strategy and management*

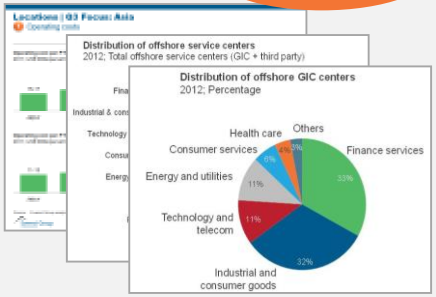
2 reports per year

- Reports/viewpoints addressing specific global/regional themes
- Examples of topics:
  - Tier-2/3 cities in CEE
  - Rise of onshoring
  - Emerging functional opportunities in locations

"Next-wave" location profiles
*Stay ahead of competition in understanding opportunities in **"next-wave" locations***

10 profiles per year

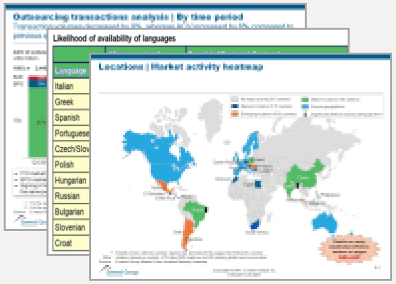
- Short profiles of emerging / "next-wave" countries or cities for global sourcing
- Coverage includes:
  - Global sourcing profile
  - Operating costs
  - Players present
  - Key risks, opportunities, drivers, and challenges



Global locations annual report
***Annual update** of locations activity, risks, perceptions, and plans*

1 report per year

- Annual report on activity and key developments across locations
- Analyses include:
  - Location set-up activity
  - Perceptions and plans of buyers and providers
  - Rankings of locations by function
  - Risk watch



Includes complimentary access to the annual locations webinar and access to analysts

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Locations Insider research calendar

Published | Current

Topic	Release date
Many Voices, Many Locations: Understanding the Multi-lingual Contact Center Market in East and Southeast Asia	April 2016
"Next-wave" location profiles: Dalian, China	May 2016
"Next-wave" location profiles: Iasi, Romania	June 2016
Global Hotspots For Digital Services	June 2016
IT Services Delivery from Latin America (LATAM)	June 2016
"Next-wave" location profiles: Dominican Republic	July 2016
"Next-wave" location profiles: Jordan	July 2016
"Next-wave" location profiles: Estonia	August 2016
Innovation Beyond Borders – Global Talent Hotspots for Engineering Services and Research & Development (ER&D)	August 2016
Banking middle- and back-office services delivery from Nearshore Europe	September 2016
Bridging the Talent Gap: Global Hotspots for Analytics Services	September 2016
"Next-wave" location profiles: Chandigarh, India	September 2016
"Next-wave" location profiles: Cape Town, South Africa	September 2016
"Next-wave" location profiles: Morocco	September 2016
IT Services Delivery from the U.S.: Making Location Decisions as Onshoring Increases	September 2016
Global Locations Annual Report 2016: Persistent Growth in Uncertain Times	October 2016
"Next-wave" location profiles: Kiev, Ukraine	Q4 2016

Additional research references

The following documents are recommended for additional insight on the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

1. **Global Locations Annual Report 2015: Resurgence of Activity Amidst Evolving Propositions**(EGR-2014-2-R-1273); The global services locations landscape is showing a resurgence of activity in 2015. While new center set-up activity in the year is likely to eclipse that in the preceding years, this growth is spread across relatively unexplored destinations and "next-wave" locations. The Global Locations Annual Report 2015 is a unique and comprehensive guide to understanding the nuances of the locations landscape and interpreting locations-related developments and trends to frame locations strategy. It presents insights into the size and growth of the global services market, update of locations activity, changes in risk profiles of locations, and an analysis of the maturity, arbitrage, and potential of locations (MAP Matrix™)

2. **Global Hotspots For Digital Services** (EGR-2016-2-R-1778); 2016. This report provides an in-depth view of the global digital services industry from a talent perspective. It covers the global distribution of digital talent coupled with cost trade-offs and provides readers with an up close view of global "sweet-spots" for various digital services

3. **IT Services Delivery from Latin America (LATAM)** (EGR-2016-2-R-1803), 2016: The report provides detailed data and analysis of the global IT services delivery landscape in Latin America. It covers overview of the offshore IT service delivery industry, assessment of key cities on parameters such as talent pool, market activity, operating cost, and risk, and relative attractiveness of locations and associated trade-offs.

4. **Innovation Beyond Borders – Global Talent Hotspots for Engineering Services and Research & Development (ER&D)** (EGR-2016-2-R-1865), 2016: This report provides an in-depth view of the global Engineering Services and Research & Development (ER&D) industry from a talent perspective. It covers global landscape and current distribution of ER&D talent across key delivery geographies and provides readers with an up close view of global "sweet-spots" for ER&D services

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