Everest Group PEAK Matrix® for IT Security Service Provider 2022 – Europe

Focus on Wipro
September 2022
Background of the research

The demand for IT security services in Europe is growing in terms of technological capabilities and localized presence of cybersecurity talent. Enterprises are grappling with cybersecurity challenges arising from the new-age security threats. Coupled with the rising trend of tying executive evaluation with cyber risk management, cybersecurity has started to become a boardroom mandate rather than just being a CISO-led effort. European enterprises are looking for service providers that can offer geographically nuanced security services, especially in areas such as data security & privacy, verticalized SOCs, converged IT/OT security services, and regulatory assessment services, to make sure that enterprises are not just adhering to ever evolving EU regulations but also the localized data privacy laws.

IT security service providers too have started to tap into these demand themes and are building capabilities to deliver the geographically contextualized services. Additionally, there is a strong push from service providers to proliferate their cybersecurity consulting capabilities in an effort to be seen as a holistic security partner that can deliver end-to-end security services.

In this research, we present an assessment and detailed profiles of 28 IT service providers for the IT security capabilities in Europe region featured on the IT Security Services PEAK Matrix® Assessment 2022 – Europe. The assessment is based on Everest Group’s annual RFI process for calendar year 2022, interactions with leading IT security service providers, client reference checks, and an ongoing analysis of the IT security services market.

The full report includes the profiles of the following 28 leading IT security service providers featured on the IT Security Services PEAK Matrix – Europe:

- **Leaders:** Accenture, Atos, HCL Technologies, IBM, TCS, and Wipro
- **Major Contenders:** Capgemini, Cognizant, Deloitte, DXC Technology, EY, Infosys, KPMG, Kyndryl, LTI, Microland, NTT DATA, Orange Cyberdefense, PwC, Stefanini, Tata Communications, Tech Mahindra, T-Systems, and Zensar
- **Aspirants:** Happiest Minds, ITC Secure, Mindtree, and Yash Technologies

Scope of this report
IT security services PEAK Matrix® – Europe characteristics

Leaders:
Accenture, Atos, HCL Technologies, IBM, TCS, and Wipro
- Leaders have gained significant mindshare among enterprise clients due to the depth and breadth of their IT security services portfolio and on-ground presence in the European geography. These players have strong focus on next-generation security themes such as data security & privacy, regulatory assessments, verticalized SOCs, IT/OT convergence, OT security, zero trust, security-embedded portfolio, SASE, and IAM
- They have a highly balanced portfolio and continue to keep pace with market dynamics through continued investments in next-generation security solutions and services capability development (internal IP/tools, partnerships, etc.)

Major Contenders:
Capgemini, Cognizant, Deloitte, DXC Technology, EY, Infosys, KPMG, Kyndryl, LTI, Microland, NTT DATA, Orange Cyberdefense, PwC, Stefanini, Tata Communications, Tech Mahindra, T-Systems, and Zensar
- These players have built meaningful capabilities to deliver IT security services. However, their service portfolios are not as balanced and comprehensive as those of Leaders (either in terms of coverage across IT security service segments, delivery mix, service type, or all)
- All these providers are making continued investments in developing internal IP and tools, as well as expanding their service and technology partner ecosystem to plug their capability gaps. This helps position them as strong challengers to Leaders in this space

Aspirants:
Happiest Minds, ITC Secure, Mindtree, and Yash Technologies
- The IT security services business of Aspirants is at a relatively early stage and is not a leading revenue generator for such players
- Nevertheless, these companies are making investments to build broader capabilities in the IT security services space to cater to buyers through service and technology partnerships as well as internal IP/tools. This is keeping them poised to be major challengers in the space
Everest Group PEAK Matrix®
IT Security Services PEAK Matrix® Assessment 2022 – Europe | Wipro positioned as Leader

Everest Group – IT Security Services PEAK Matrix® Assessment 2022 – Europe1,2

1 Assessments for Capgemini, Deloitte, EY, IBM, KPMG, Orange Cyberdefense, PwC, and T-Systems is based on Everest Group’s proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group’s interactions with enterprise buyers.
2 Analysis for LTI and Mindtree is based on capabilities before their merger.

Source: Everest Group (2022)
### Wipro | IT security services – Europe (page 1 of 7)

**Everest Group assessment – Leader**

<table>
<thead>
<tr>
<th>Market impact</th>
<th>Vision &amp; capability</th>
</tr>
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<tbody>
<tr>
<td>Market adoption</td>
<td>Vision and strategy</td>
</tr>
<tr>
<td>Portfolio mix</td>
<td>Scope of services offered</td>
</tr>
<tr>
<td>Value delivered</td>
<td>Innovation and investments</td>
</tr>
<tr>
<td>Overall</td>
<td>Delivery footprint</td>
</tr>
<tr>
<td>Strengths</td>
<td>Limitations</td>
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</tbody>
</table>

**Strengths**

- Wipro has expanded its cybersecurity delivery capabilities through acquisitions such as Edgile and Capco for consulting and Ampion for analytics and DevOps, providing clients with robust solutions and expert talent.
- Clients have appreciated Wipro’s ability to move fast on new-age security themes through its investments in multiple start-ups via the Wipro venture capital fund.
- Enterprises looking for a service provider with robust GRC and data security capabilities will find Wipro to be a good fit because of its credible proof points around ServiceNow GRC and its investments in data security services.
- Clients have acknowledged Wipro’s ability to contain attrition through various talent retention initiatives such as the CyberSecurist program, leadership skill-building initiatives, and its partnership with academia.
- Wipro offers automation-enabled solutions such as EdgileArC for GRC and HOLMES for Cyber that covers TPRM, which results in reduced human effort and accurate outcomes.

**Limitations**

- Enterprise buyers from public sector vertical must be wary that Wipro has limited proof points in delivering security services to this specific vertical.
- Enterprises looking for a robust onshore-nearshore presence will find Wipro lagging its peers in providing a strong localized presence.
- A few clients have highlighted that Wipro takes a siloed approach in delivering security services and is not proactive in pitching innovative solutions.
- Some clients have indicated that Wipro needs to be more innovative in its pricing constructs.
- Enterprises buyers from automotive industry might not find Wipro to be a good fit because it lags peers in delivering dedicated security services for this vertical.
- Enterprises buyers looking for OT security services should be aware that Wipro has limited partnerships in this domain and lags peers in building dedicated solutions for OT.
Wipro | IT security services – Europe (page 2 of 7)

Overview

Vision
Wipro’s vision is to assist various enterprises in achieving a resilient cyber future. It also wants to be on the leading edge of technology innovation, get recognition from its peers in the cyber services industry, and purposefully give back to the cyber security community.

IT security services revenue (2021)

<table>
<thead>
<tr>
<th>&lt;US$200 million</th>
<th>US$200-500 million</th>
<th>US$500 million-US$1 billion</th>
<th>&gt;US$1 billion</th>
</tr>
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</table>

Adoption by industry

<table>
<thead>
<tr>
<th>BFSI</th>
<th>Energy and utilities</th>
<th>Manufacturing</th>
</tr>
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<tbody>
<tr>
<td>Electronics, hi-tech, and technology</td>
<td>Healthcare and life sciences</td>
<td>Telecom, media, and entertainment</td>
</tr>
<tr>
<td>Public sector</td>
<td>Retail and CPG</td>
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</table>

Adoption by service segments

<table>
<thead>
<tr>
<th>Application security</th>
<th>Cloud security</th>
<th>Data security</th>
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<tbody>
<tr>
<td>Identity and access management</td>
<td>IoT and OT security</td>
<td>Risk management and compliance</td>
</tr>
<tr>
<td>End-point security</td>
<td>Network security</td>
<td></td>
</tr>
</tbody>
</table>

Adoption by buyer group

<table>
<thead>
<tr>
<th>Small (annual revenue &lt; US$1 billion)</th>
<th>Medium (annual revenue = US$1-5 billion)</th>
<th>Large (annual revenue &gt; US$5 billion)</th>
</tr>
</thead>
</table>

Adoption by country

<table>
<thead>
<tr>
<th>UK &amp; Ireland</th>
<th>Nordics</th>
<th>Benelux</th>
</tr>
</thead>
<tbody>
<tr>
<td>France &amp; southern Europe</td>
<td>DACH</td>
<td>Others</td>
</tr>
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</table>

Source: Everest Group (2022)
Case study 1  Redesigned a service delivery model to ensure better compliance

**Client:** the world’s second-largest tobacco company

**Business challenge**
The client's environment is decentralized and distributed, and numerous infrastructure components do not meet the desired thresholds. Without a comprehension of the organization's security posture, various suppliers were jointly managing all the client's DCS and DRS.

**Solution**
Wipro redesigned the service delivery model and onboarded services into an integrated service framework. It also enhanced the client service framework in the following ways:
- Transitioned services incrementally starting with two services initially, and within 12 months it integrated 10 services across the security services portfolio
- Standardized & optimized network security infrastructure, firewall assurance, and governance, audit, and reporting

**Impact**
- Increased endpoint compliance posture from 90 to 99% for servers and overall endpoints by 60 to 95%
- Improved firewall compliance posture from 65% to 99%
- Reduced incident ticket volumes by 20%

Case study 2  Adoption of identity and life cycle management solution for a Swiss multinational

**Client:** a Swiss multinational food and drink processing conglomerate

**Business challenge**
Due to the client’s extensive customization, introducing frozen jobs to the One IDM solution and carrying out health checks posed significant challenges. Additionally, business stakeholders demanded access to information on the progress of everyday tasks that involved the ops team's manual labor and time.

**Solution**
Wipro adopted one IDM as an identity life cycle management solution to manage users in the active directory, web applications, the Safeguard PAM system, and other systems. It implemented specific rules that would be required due to extensive customization in the identity life cycle area. Additionally, an IMC dashboard solution was put into place, which helped in extracting the health status from One IDM and displaying it on a dashboard for the operations team. To facilitate decision-making and improve corporate visibility, all frozen jobs were identified, presented on the dashboard with problem codes, and produced automatic reports.

**Impact**
- Reduced 50% of administrative overheads
- Saved 120 minutes per day in health checks
- Increased 30% efficiency to issue resolution as triaging is done and presented on a dashboard
### Proprietary solutions/IP/products (representative list)

<table>
<thead>
<tr>
<th>Solution name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cyber Defense Portal (CDP)</strong></td>
<td>CDP is a platform that gives a single pane view of cyber security risks, threats, attacks, and response measures undertaken in the enterprise. It provides a view of the security posture of the enterprise by monitoring application and infrastructure vulnerabilities, threat intelligence, and security monitoring by integrating a variety of security tools. The goal of the CDP is to help customers and thwart coordinated cyber attacks across the enterprise’s digital landscape.</td>
</tr>
<tr>
<td><strong>Security Management Center (SMC)</strong></td>
<td>It aids in the transformation journey of customers by increasing efficiencies in managing operations on the security infrastructure covering both on-premise and the cloud.</td>
</tr>
<tr>
<td><strong>SIaaS</strong></td>
<td>SIaaS is an advanced security monitoring service that is powered by an ecosystem of partner tools, home-grown platforms, and custom use cases. The solution consists of a multi-tenant-based SIEM platform that is integrated with the TIaaS, CDP Portal, and the customer environments through collectors.</td>
</tr>
<tr>
<td><strong>Threat Intelligence-as-a-Service (TIaaS)</strong></td>
<td>TIaaS provides the capability to identify, contextualize, and deliver intelligence. Wipro’s TIaaS continuously discovers the critical threats targeting businesses by mapping external threat intelligence to the client’s unique digital assets. It delivers tailored intelligence from across the clear, deep, and dark web in the form of categorized alerts to customers’ organizations.</td>
</tr>
<tr>
<td><strong>Playbook-as-a-Service</strong></td>
<td>Playbook-as-a-Service powered by a SOAR platform helps to automate security incident detection and response in an organization with the help of playbooks, API integrations, and automation scripts. This also provides analysts with a reliable platform to perform incident response and handle security incidents seamlessly.</td>
</tr>
<tr>
<td><strong>Cloud Application Risk Governance (CARG)</strong></td>
<td>CARG offers a risk and compliance posture view of the application hosted on the cloud to the business and application owners. CARG gives complete visibility from the compliance perspective of the application with customizable use case implementation as per customer requirements. CARG platform and back-end framework of security control definition are suitable for any cloud service provider.</td>
</tr>
<tr>
<td><strong>Identity Management Center (IMC)</strong></td>
<td>The IMC is a platform that strings together multiple types of IAM solutions by bringing in valuable functionality including a centralized and unified dashboard.</td>
</tr>
<tr>
<td><strong>Third-party Risk Management Platform (TPRM-HOLMES)</strong></td>
<td>This solution helps organizations accelerate the pace and frequency of risk assessment of dependent third parties. It is aligned to the business owners of the organization by providing risk and compliance posture across business applications, processes, and organizational hierarchy.</td>
</tr>
<tr>
<td><strong>Monitoring Automation Framework (MAF)</strong></td>
<td>MAF helps to provide centralized monitoring for the various IAM tools present in the customer’s identity landscape through API-based integrations with these tools.</td>
</tr>
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</table>
#### Wipro | IT security services – Europe (page 5 of 7)

**Partnerships**

<table>
<thead>
<tr>
<th>Partner name</th>
<th>Type of partnership</th>
<th>Details of the partnership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft</td>
<td>Cloud security</td>
<td>Wipro has a multi-channel relationship. As a key global advisory, SI, and Managed Security Services Provider (MSSP) partner its co-sell offerings go across Azure and M365 security and privacy. It is an elite global partner, and it provides MXDR and broader cyber security services via its industry solutions delivery arm.</td>
</tr>
<tr>
<td>AWS</td>
<td>Cloud security</td>
<td>Wipro is an AWS MSSP competency partner and provides joint AWS security solutions to global customers. Wipro offers different AWS security services and extensively leverages AWS native security services for large-scale cloud deployment projects.</td>
</tr>
<tr>
<td>Google</td>
<td>Cloud security</td>
<td>Google and Wipro offering leading security solutions and services within cyber security risk advisory, transformation, and managed security services. Wipro is also a Google security specialization partner. Wipro and Google are working on providing advanced managed security and cloud security operations capabilities.</td>
</tr>
<tr>
<td>Palo Alto</td>
<td>Cloud security</td>
<td>Wipro collaborates strategically with Palo Alto Networks as a CPSP partner to leverage its Coretex SOAR, Prisma cloud, and Strata capabilities across Wipro’s CDC MSSP stack and cloud security services.</td>
</tr>
<tr>
<td>Zscaler</td>
<td>Network security</td>
<td>This is Wipro’s strategic partner for zero trust network solutions &amp; secure cloud migrations. The Wipro and Zscaler partner program provides new training certifications for the Zscaler Digital Experience (ZDX) platform.</td>
</tr>
<tr>
<td>Sailpoint</td>
<td>Identity and access management</td>
<td>Wipro developed joint solutions with Sailpoint, primarily for on-premise-based identity governance and administration and delivers SI and managed services to clients.</td>
</tr>
<tr>
<td>CyberArk</td>
<td>Identity and access management</td>
<td>It developed joint solutions with CyberArk, primarily in the area of Privileged Access Management (PAM), and delivers SI, and managed services to clients.</td>
</tr>
<tr>
<td>Saviynt</td>
<td>Identity and access management</td>
<td>The company developed joint solutions with Saviynt, primarily for cloud-based identity governance and administration, and delivers SI and managed services to clients.</td>
</tr>
<tr>
<td>ServiceNow</td>
<td>Risk management and compliance</td>
<td>The GRC practice has successfully delivered hundreds of client projects across ServiceNow GRC and security operations modules. Wipro has built over 25 solution accelerators on ServiceNow.</td>
</tr>
<tr>
<td>SAP Security &amp; GRC</td>
<td>Risk management and compliance</td>
<td>The company GRC practice has successfully delivered over 25 engagements across different SAP security &amp; GRC modules.</td>
</tr>
<tr>
<td>OneTrust</td>
<td>Risk management and compliance</td>
<td>The GRC practice has successfully delivered over 50 engagements across OneTrust GRC and data privacy modules.</td>
</tr>
</tbody>
</table>
## Partnerships

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<tbody>
<tr>
<td>Cisco</td>
<td>Endpoint security</td>
<td>Wipro developed joint solutions with Cisco Security for multiple solutions including MDR, perimeter security defense, CASB, messaging, and web security solutions.</td>
</tr>
<tr>
<td>Crowdstrike</td>
<td>Endpoint security</td>
<td>Wipro developed joint solutions with Crowdstrike for multiple solutions including MDR, next-generation antivirus, and delivery as a service to clients.</td>
</tr>
<tr>
<td>RSA</td>
<td>Risk management and compliance</td>
<td>Wipro developed joint solutions with RSA primarily in the area of GRC and delivering SI and managed services to clients.</td>
</tr>
<tr>
<td>MetricStream</td>
<td>Risk management and compliance</td>
<td>Wipro developed joint solutions with MetricStream primarily in the area of GRC.</td>
</tr>
<tr>
<td>Forcepoint</td>
<td>Data security</td>
<td>Wipro established 360-degree relationships, both in delivering joint solutions to Wipro’s clients and as a global Professional Services (PS) partner to Forcepoint clients across the globe.</td>
</tr>
<tr>
<td>Microfocus</td>
<td>Data security</td>
<td>Wipro developed joint solutions with Microfocus for multiple solutions including application security assurance (Security code review and DevSecOps), data security, and in delivering SI and managed services to clients.</td>
</tr>
<tr>
<td>Symantec</td>
<td>Data security</td>
<td>It entered into partnerships across multiple domains such as compliance, data center security, advanced threat protection, and data leakage prevention.</td>
</tr>
<tr>
<td>Splunk</td>
<td>Data security</td>
<td>This helps in security analytics for big data.</td>
</tr>
<tr>
<td>IBM</td>
<td>Network security</td>
<td>Wipro developed joint solutions with IBM primarily in the area of SIEM and security operations and in delivering SI and managed services to clients.</td>
</tr>
<tr>
<td>Checkpoint</td>
<td>Network security</td>
<td>Wipro developed joint solutions with Checkpoint primarily in the area of network perimeter defense and in delivering SI and managed services to clients.</td>
</tr>
<tr>
<td>McAfee</td>
<td>Data security</td>
<td>Wipro leverages McAfee solutions to deliver managed networks, endpoint, and data security services.</td>
</tr>
<tr>
<td>F5</td>
<td>Network security</td>
<td>Wipro leverages F5 products to deliver network security, load balancer, and web application services.</td>
</tr>
<tr>
<td>Radware</td>
<td>Application security</td>
<td>It leverages Radware products to deliver network security, load balancer, and web application services.</td>
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</table>
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**Investments and recent activities**

### Investments (representative list)

<table>
<thead>
<tr>
<th>Investment name</th>
<th>Details</th>
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<tbody>
<tr>
<td><strong>Acquisition</strong></td>
<td>Wipro acquired three companies, Edgile, Capco (risk &amp; security practice), and Ampion, to strengthen its leadership in strategic cyber security services across North America, Europe, and APAC</td>
</tr>
<tr>
<td><strong>Talent</strong></td>
<td>Rolled out the CyberSecurist functional model to drive holistic development across cyber technology, risk, sector, consulting, and program management with a renewed career architecture framework</td>
</tr>
</tbody>
</table>
| **Others** | - **ShiftLeft**: a modern AppSec platform that helps minimize the attack ability of client’s applications, improve developer productivity, and accelerate software delivery  
- **Securonix**: Securonix is a next-generation analytics platform with SOAR capabilities that can be deployed across the cloud and on-premises. It is being leveraged for shared services engagements for analyzing millions of security events in real-time  
- **Vulcan**: Vulcan Cyber provides the industry’s first vulnerability remediation orchestration platform, built to help businesses reduce cyber risk through measurable cloud and application security  
- **Vectra**: Vectra enables the clients to conduct real-time continuous threat monitoring across the network and the data center to instantly identify any phase of a cyber attack  
- **Cycognito**: Cycognito enables security teams to eliminate critical attack vectors. Cycognito offers a SaaS platform that can map the attack surface of organizations and help eliminate blind spots that can be exploited by attackers  
- **Immuta**: it helps in automating data access and privacy controls to accelerate self-service data delivery, simplify administration, reduce risk, and safely unlock more data use in the cloud |
Appendix
Everest Group PEAK Matrix® for IT Security Service Provider 2022 – Europe

Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- **Market adoption**
  - Number of clients, revenue base, YoY growth, and deal value/volume

- **Portfolio mix**
  - Diversity of client/revenue base across geographies and type of engagements

- **Value delivered**
  - Value delivered to the client based on customer feedback and transformational impact

Measures ability to deliver services successfully. This is captured through four subdimensions

- **Vision and strategy**
  - Vision for the client and itself; future roadmap and strategy

- **Scope of services offered**
  - Depth and breadth of services portfolio across service subsegments/processes

- **Innovation and investments**
  - Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

- **Delivery footprint**
  - Delivery footprint and global sourcing mix
Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

Everest Group PEAK Matrix®

Market impact
(Measures impact created in the market)
Low
High
Vision & capability
(Measures ability to deliver services successfully)
Low
High
Leaders
Major Contenders
Aspirants
Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging provider / technology vendor RFIs and Everest Group's proprietary databases containing providers’ deals and operational capability information). In addition, these results are validated / fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings.

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group’s overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment.
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles.

What is the process for a provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
  - Issue a press release declaring their positioning. See citation policies.
  - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
  - Quotes from Everest Group analysts could be disseminated to the media
  - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group.

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises.
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