

# Webinar: The Enterprise Business Case for Cloud Transformation

Introducing Everest Group's Next Generation IT Practice

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# Today's Agenda





What is IT Transformation?



How Does Transformation Create Business Value?



Everest Group's Next Generation IT Services

### Global IT Services Market Forces



Enterprises are challenged to respond to extreme market demands for efficiency and flexibility

### **Demand for Efficiency**

### Increasing Value Focus

- Ongoing budget pressure
- Demand for business value
- Vendor pricing

### **Demand for Flexibility**

# Increasing Pace of Innovation

- 'Consumerization' of IT
- Device proliferation
- Compressed cycle time

### **Drive to Improve Utilization**

- High cost 'single-tenant' models
- Underutilization of dedicated hardware
- Suboptimal skill mixes

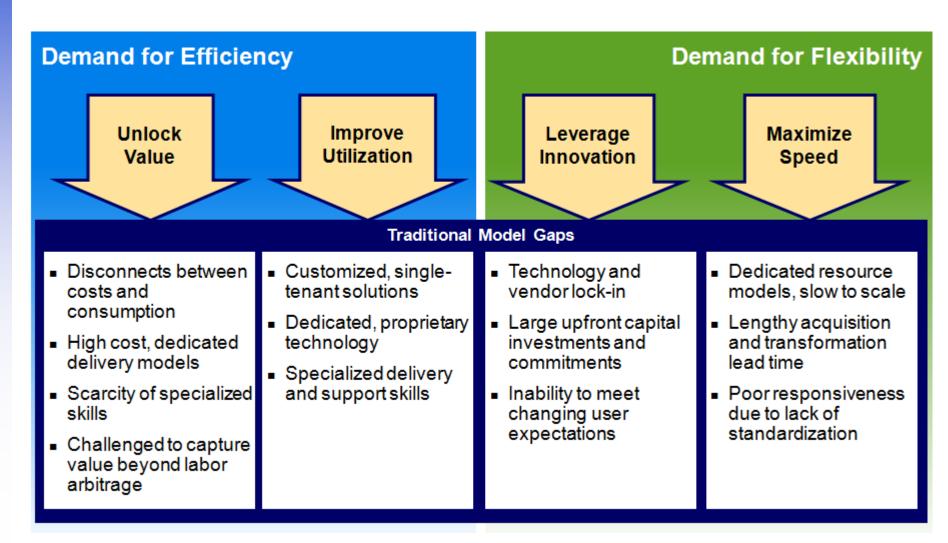
Extreme
Demands on IT
and Business
Functions

### Need for Responsiveness

- Volume growth and high variability
- Explosion of data and complexity
- Speed/on-demand service

# Traditional Model Alignment Traditional IT delivery models are challenged to meet these demands





# Legacy IT is High Cost and Inflexible





### Inefficient

### Inflexible/Unresponsive

- Non-scalable
- Duplication
- Underutilized capacity

### Monolithic & Non-standard



 Long and expensive process to acquire, deploy, change, and decommission IT services

 Efficiency improvement constrained by technology/vendor

### **Long-term Commitment**



- Major capital investment
- Technology/vendor lock-in

- On-site centric, high cost delivery
- Surplus of people, shortage of skills

### **Suboptimal Delivery Model**



- Devised-based support
- Misalignment of cost and usage

### **Next Generation IT Models**

# Disruptive Next Generation IT models create game changing opportunities



# **Generation Models**

Next

### **Efficiency Impact**

### **Flexibility Impact**



### **Next-Gen Data Centers**

Designed to take advantage of modular, hyper-scale and highdensity principles

- Dramatically lowered cost
- Reduced latency
- Simplified management
- Highly scalable

- Standardization equals speed
- 'Right-sized' capacity
- 'Just-in-time' capacity



### **Cloud Services**

IT delivered as a service through private, public, and/or hybrid cloud models

- Dynamic workload shift to achieve 4-5X efficiency gain
- Pooled resources/multitenancy
- Cost linked to consumption
- On-demand processing and storage capacity
- Self-service provisioning
- Capital avoidance



### **Talent Factories**

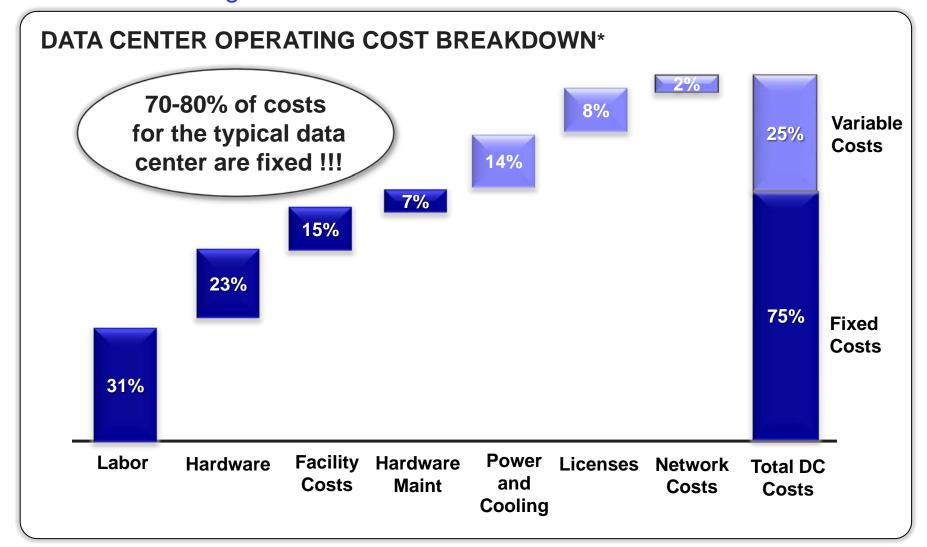
High talent, low cost resources organized by an optimized workforce pyramid

- Optimized staffing pyramid leading to improved resource utilization
- Remote support from low cost locations
- Improved access to specialized skills and technical expertise
- Enhanced resource scalability

### New IT Economic Models



Next Generation IT models drive value by making the legacy environment's high fixed costs more variable



<sup>\*</sup> Everest Group analysis assuming 3,000 server data center, 200:1 server-to-admin ratio 3 year depreciation schedule

### **Next Generation IT**

# Disruptive Next Generation IT models create game changing opportunities



### **Next Generation IT**

Open | Integrated | Secure

### Private Cloud (On-Premise)

- Cloud appliances
- Next-Gen data centers
- Virtual architectures
- RIMO



### Private Cloud (Off-Premise)

- Hosting services
- Converged infrastructure
- Virtual architectures
- RIMO



### **Public Cloud**

- Open source compute, storage offerings
- vCloud, Azure-based IAAS / PAAS Offers
- RIMO



### Dedicated

- Hosting services
- Next Gen data centers
- High-density Servers
- RIMO



### **Transformation Consulting**

# Today's Agenda





What is IT Transformation?



How Does Transformation Create Business Value?



Everest Group's Next Generation IT Services

### IT Transformation

### Three key levers drive transformation impact



### **Hybrid Cloud**

- Move workloads to the most efficient computing environment
- Variablize fixed cost infrastructures by leveraging public clouds – Pay-for-Use model
- Maximize utilization of owned environment, to minimize use of public cloud environments

# Application & Infrastructure Rationalization

- Reduce application license costs
- Eliminate infrastructure to host redundant applications
- Reduce application and infrastructure support costs
- Maximize the value of the existing applications and functionality

# Remote Delivery Models

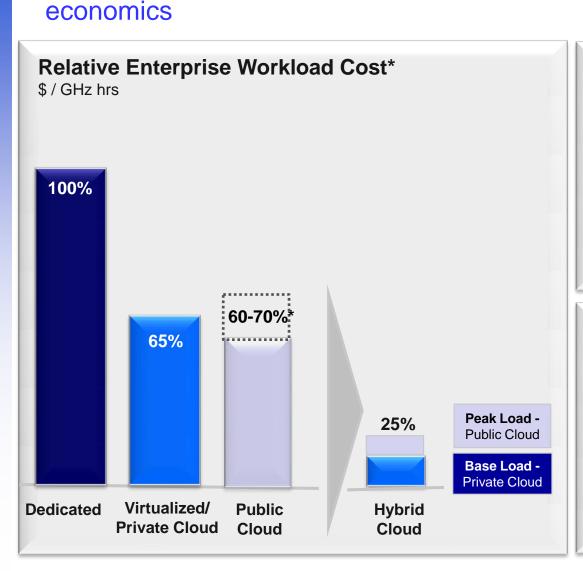
- Automate functionality to reduce labor costs
- Move labor to low cost, high quality delivery locations
- Match appropriate skill set to the work requirements

### Hybrid Cloud

# Cloud delivery models promise to unlock extraordinary enterprise



Application and Infrastructure Rationalization RIMO Delivery Models



### **Increasing Business Agility**

Server Provisioning	Legacy	Cloud
Request Servers	Weeks	Hours
Request Storage	Weeks	Hours
Configure HW	Day	Minutes
Install OS	Day	Minutes

- 40% potential efficiency gain from hybrid bursting
- Hybrid economics more disruptive than virtualization!

<sup>\*</sup> Based on average workload mix and profile. 15% of total peak workload hours shifted to public cloud ,on demand model. Does not include application migration costs.

### Optimizing Capacity Utilization

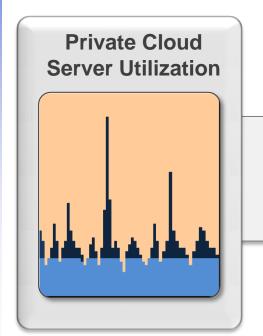
Improving utilization and eliminating excess capacity is the key to

realizing transformation economics



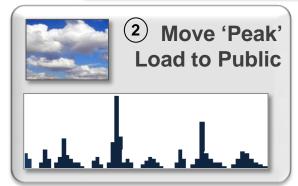


RIMO Delivery Models

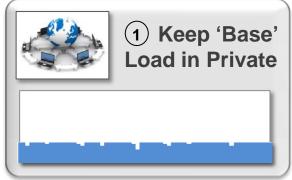




 Eliminate spend on unused 'peak' capacity



- Shift peak loads to public cloud(s)
- Leverage on-demand 'pay-as-you-go' flexibility



- Shift loads to fill valleys (where possible)
- Maximize private cloud utilization

### Cloud Economics

### eBay Case Example





Application and Infrastructure Rationalization RIMO Delivery Models

### **Situation**



- Global marketplace footprint (NA, Europe, Asia)
- Highly 'spiky' compute utilization
- Top 8 workloads supported by 1,900 servers
- ~80% of data center costs fixed
- \$80mm annual data center spend



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### **Hybrid Model Impact**

- Working with Rackspace and Microsoft to solve the bursting equation
- Realizes significant potential of bursting to public cloud and eliminating unused capacity
- Identified opportunities to <u>reduce overall compute costs by 40%</u> via hybrid models
- Peak bursting would be more cost effective even if public cloud unit costs were <u>4x higher</u> than internal unit costs

# Application and Infrastructure rationalization Rationalizing IT resources can significantly lower operating costs



Cloud Computing Environments Application and Infrastructure Rationalization RIMO Delivery Models

### **Cost of Infrastructure Sprawl**

Application portfolio costs are excessive. The ongoing operations and maintenance costs consume 65% of IT budgets on average - with some firms admitting that costs exceed the 90<sup>th</sup> percentile.

Decades of accumulation in an effort to keep pace with business change have created duplication, waste, and bloat, yet IT can't tie the size, cost, and resource consumption characteristics to specific applications - we tend to treat it as one large bucket of cost.

IT expenditures that don't have clear business value are no longer getting funded, and business leaders are increasingly suspicious of IT spending habits and accountability.

-Forrester Research

### **Rationalization Results**

Navy Installations Command identified \$20 - \$40 million in IT savings by, among other things, shrinking by <u>70 percent</u> the number of business applications it used.

-Accenture case study

**Dell** has <u>cut its number of applications in half</u>, to 5,000, and plans to "bring it down into the hundreds." Reducing apps allowed the company to eliminate 10,000 servers to-date.

- Forbes interview of Steve Schuckenbrock, 2009

A Fortune 100 financial services company, while going through a merger, targeted <u>450</u> <u>applications for retirement</u>, resulting in \$7 million of savings. – *Itbusinessedge.com* 

### Labor Arbitrage





RIMO Delivery Models

### A Leading Global Chemical Company Road to RIMO

2003 – 2004	2005 – 2006	2007- 2008	2008 – 2010
Started RIM for N America region	Started EMEA/Asia Sup.	E2E India Service Ownership	Global Management Role
15% offshore	40% offshore	60% offshore	80% offshore
Follow the Moon	Follow the Sun, 24x7	Follow the Sun, 24x7	Follow the Sun, 24 x7
Wintel	Wintel	Wintel	Wintel
Lotus Notes/Messaging	Lotus Notes/Messaging	Lotus Notes/Messaging	Lotus Notes/Messaging
Desktop	Desktop	Desktop	Desktop
Storage	Storage	Storage	Storage
Monitoring	Monitoring	Monitoring	Monitoring
	Unix	Unix	Unix
	Databases	Databases	Databases
	Asset Mgmt./Project Mgmt.	Asset Mgmt./Project Mgmt.	Asset Mgmt./Project Mgmt.
	Service Desk L2	Service Desk L2	Service Desk L2
	Network	Network	Network
↓	Mainframe/ VMS	Mainframe/ VMS	Mainframe/VMS
		AS400	AS400
		Mobility, Mid-tier Apps	Mobility, Mid-tier Apps
New Services		IS Security and DR	IS Security and DR
			Dynamic Desktop, Virtualizatio
36171000			BPOS/Cloud
	nt Outsourcing		Green IT

Source: NASSCOM

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# Today's Agenda





What is IT Transformation?



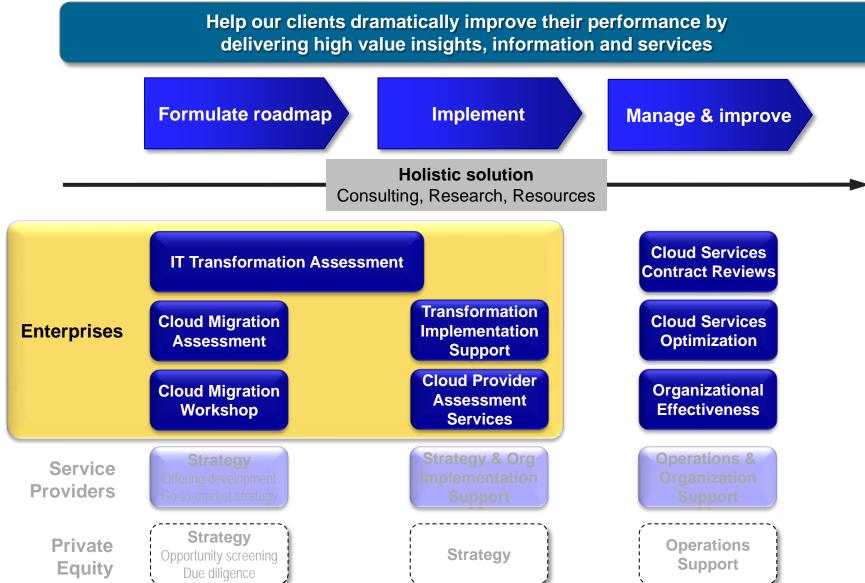
How Does Transformation Create Business Value?



Everest Group's Next Generation IT Services

### Next Generation IT Service Offerings



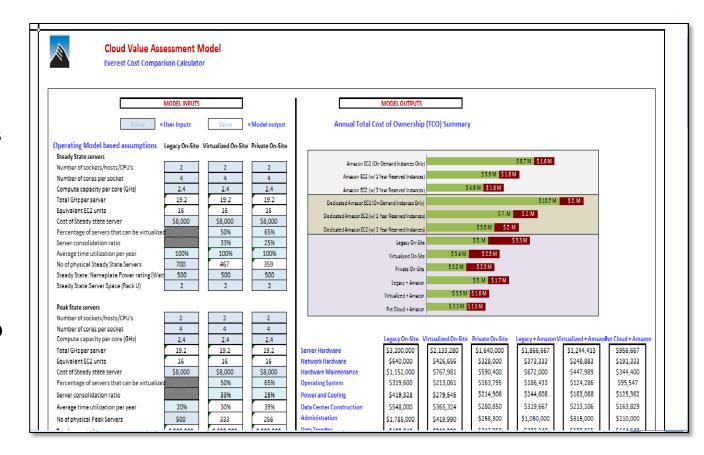


### Cloud Economics



# An Economic Assessment Model is cornerstone to the toolkit, providing visibility across multiple compute environments

- Application and infrastructure rationalization
- Models workload Economics across Cloud delivery models
- Migration costs considered within the business case
- Labor models
   considered to help
   build business
   case across
   compute
   environments





### **IT Transformation Assessment**



**Description** 

Everest Group's IT transformation assessments helps clients build a business case for overall IT transformation, including assessment of workload migration opportunities, 'modernization' opportunities with non-migrated workloads and infrastructure, and RIMO opportunities.

**Deliverables** 

Overall business case and high level roadmap for comprehensive 3-5 year IT transformation

Who's it For?

- Enterprises moving from cloud 'experimentation' phase
- ITO clients nearing End of term
- Industries with "spiky" workload profile

### **Approach**



# Examine the application and infrastructure portfolio and supporting organization to drive impact and build a repeatable process

# Current Environment:

- High fixed costs
- Low resource utilization
- Inflexible environment
- Sub-optimal labor costs

# **Enterprise IT Transformation Methodology**

Goal Setting

Workload Segmentation & Opportunity Identification

Feasibility & Economic Analysis

Action Plans/ Roadmap

- Establish transformation goals
- Examine the whole IT portfolio for opportunities
- Assess financial impact of options
- Recommend specific actions & define implementation roadmap

# Target environment:

- Lower fixed costs: pay only for what you use
- High resource utilization
- Flexible environment
- Labor optimized by location
- Impact in pilot accounts → actionable initiatives
- Refined analytic tools and templates
- Repeatable process/approach

### **Toolkit Elements**

# EVEREST

# The toolkit defines the enterprise opportunity given a transformation to cloud based infrastructures

1 Create Workload Inventory

### **Analytics**

- Data mining
- Data warehouse

### **Business Apps**

- CRM
- Marketing
- ERP
- SCM
- HCM

#### Collaboration

- Email
- Web conferencing
- Unified communications
- VOIP

#### Infrastructure

- App streaming
- Business continuity/DR
- Data archival
- Data backup

2 Rationalize App Portfolio

### **Technical Criteria**

- Integration to other applications
- Feature functionality overlap
  - •
  - •

### **Business Criteria**

- Business needs by geography and business unit
- Business criticality
- Data integrity
- •

# (3) Assess Cloud Viability

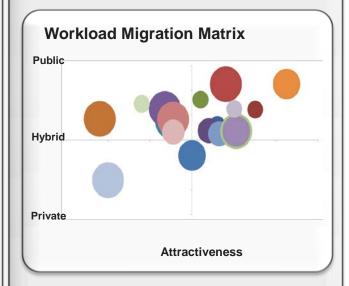
### **Technical Criteria**

- Workload variability
- Compute intensity
- Memory intensity
- Bandwidth intensity
- Others
- •
- •

### **Business Criteria**

- Data sensitivity
- Business criticality
- Auditability
- Mobility / User
   Access
- Others
- •
- •

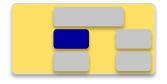
# Prioritize Workload Migration Opportunities



- Prioritize workload opportunities
- Conduct 'deep dive' assessments on high potential workloads
- Develop overall migration and transformation roadmap



### **Cloud Migration Assessment**



**Description** 

Everest Group's cloud migration assessment provides clients a workload-based roadmap for transitioning to cloud and next generation delivery platforms. The cloud migration assessment leverages Everest Group best practices, frameworks and tools for evaluating both technical and business migration factors across the workload portfolio.

**Deliverable** 

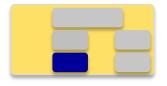
Overall business case and high level roadmap for migrating workloads to the cloud

Who's it For?

- Large and mid-size enterprises
- ITO clients nearing end of term
- Industries with "spiky" workload profile



### **Cloud Migration Workshop**



**Description** 

Everest Group offers one-day or half-day workshops to conduct quick assessments and cloud migration analyses on 2-3 priority workloads. The workshop provides exposure and access to Everest Group subject-matter experts, best practices and tools in highly-focused problem solving sessions.

**Deliverable** 

High level opportunity assessment and recommendation for priority workload migration

Who's it For?

- Large and mid-size enterprises in 'experimentation'
- Industries with "spiky" workload profile

### **Enterprise Offerings**





**Description** 

Implementation Support services will support client initiatives to move from assessment to transformation opportunity capture. Effort will include additional opportunity scoping / assessment as necessary, prioritization, vendor and offering evaluation, and may include broad program management and oversight.

**Deliverable** 

Detailed Year 1 transformation plan and initial implementation support required for capture.

Who's it For?

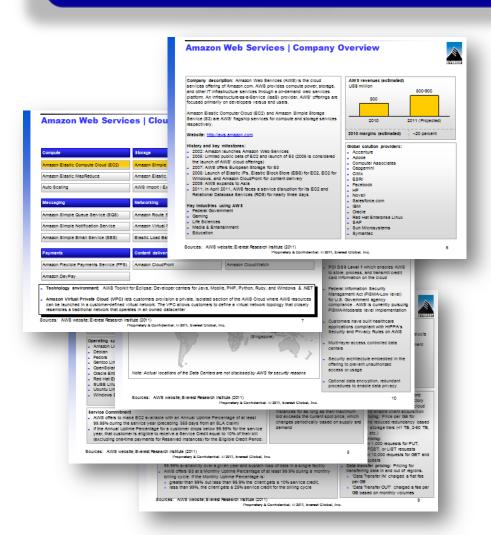
Clients moving to capture of transformation opportunity

### **Enterprise Offerings**

# Cloud Provider Assessment Services







### **ERI Cloud Provider Profiles**

- Profiles of leading laas (Infrastructure-as-a-Service) service providers are available from Everest Group Research
- Current profiles include:
  - Amazon Web Services (AWS)
  - Microsoft Azure
  - Rackspace
- To access these
   complimentary profiles visit
   our service provider directory at
   http://www.everestresearchinstit
   ute.com/SupplierDirectory



# Cloud Offering Service Provider Profile



June 2011

### Amazon Web Services | Company Overview



**Company description:** Amazon Web Services (AWS) is the cloud services offering of Amazon.com. AWS provides compute power, storage, and other IT infrastructure services through a on-demand web services platform. An Infrastructure-as-a-Service (IaaS) provider, AWS' offerings are focused primarily on developers versus end users.

Amazon Elastic Computer Cloud (EC2) and Amazon Simple Storage Service (S3) are AWS' flagship services for compute and storage services respectively.

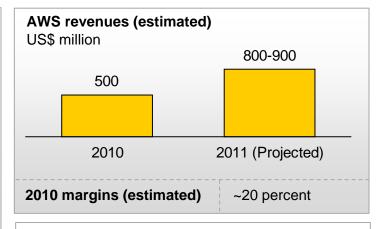
Website: http://aws.amazon.com

### History and key milestones:

- 2002: Amazon launches Amazon Web Services
- 2006: Limited public beta of EC2 and launch of S3 (2006 is considered the launch of AWS' cloud offerings)
- 2007: AWS offers European Storage for S3
- 2008: Launch of Elastic IPs, Elastic Block Store (EBS) for EC2, EC2 for Windows, and Amazon CloudFront for content delivery
- 2009: AWS expands to Asia
- 2011: In April 2011, AWS faces a service disruption for its EC2 and Relational Database Services (RDS) for nearly three days

### **Key industries using AWS**

- Federal Government
- Gaming
- Life Sciences
- Media & Entertainment
- Education



### **Global solution providers:**

- Accenture
- Adobe
- Computer Associates
- Capgemini
- Citrix
- ESRI
- Facebook
- HP
- Novell
- Salesforce.com
- IBM
- Oracle
- Red Hat Enterprise Linux
- SAP
- Sun Microsystems
- Symantec

### Amazon Web Services | Cloud offerings



Flagship offerings – examined in detail

Compute	Storage	Database
Amazon Elastic Compute Cloud (EC2)	Amazon Simple Storage Service (S3)	Amazon SimpleDB
Amazon Elastic MapReduce	Amazon Elastic Block Store	Amazon Relational Database Service
Auto Scaling	AWS Import / Export	
Messaging	Networking	Deployment, Management
Amazon Simple Queue Service (SQS)	Amazon Route 53	AWS Elastic Beanstalk
Amazon Simple Notification Service	Amazon Virtual Private Cloud	AWS CloudFormation
Amazon Simple Email Service (SES)	Elastic Load Balancing	
Payments	Content delivery	Monitoring
Amazon Flexible Payments Service (FPS)	Amazon CloudFront	Amazon CloudWatch
Amazon DevPay		

- Technology environment: AWS Toolkit for Eclipse; Developer centers for Java, Mobile, PHP, Python, Ruby, and Windows & .NET
- Amazon Virtual Private Cloud (VPC) lets customers provision a private, isolated section of the AWS Cloud where AWS resources
  can be launched in a customer-defined virtual network. The VPC allows customers to define a virtual network topology that closely
  resembles a traditional network that operates in an owned datacenter

# Amazon Web Services | Amazon Elastic Compute Cloud (EC2)



#### **Amazon EC2 overview**

- Amazon Elastic Compute Cloud (EC2) is a web service that resizable computing capacity in the cloud
- EC2 allows users to use web services to purchase computing capacity on virtual machines or instances to run specific applications on a variety of operating systems.
   The system offers an elastic computing environment, allowing users to increase or decrease capacity based on requirements
- EC2 uses Amazon Machine Image (AMI) a packaged environment that includes all the necessary bits to set up and boot instances
- Amazon EC2 instances are grouped into six families that allow a user to select a configuration of memory, CPU, and storage that is required for the application

### Amazon EC2 clients (partial list):

- 99 designs
- Active.com
- Bankinter
- Ericsson
- Harvard Medical School
- Mahindra Satyam
- Netflix
- Scribd
- TicketLeap
- Washington Post

### **Operating systems**

- Amazon Linux AMI
- Debian
- Fedora
- Gentoo Linux
- OpenSolaris
- Oracle Enterprise Linux
- Red Hat Enterprise Linux
- SUSE Linux Enterprise
- Ubuntu Linux
- Windows Server

#### **Databases**

- IBM DB2
- IBM Informix
- MSFT SQL Server Std.
- MySQL Enterprise
- Oracle Database 11g

### Web hosting

- Apache HTTP
- IIS / Asp .NET
- IBM WebSphere Portal Server

### **Application servers**

- IBM WebSphere
- Java
- Oracle Weblogic

### Application development environment

- IBM sMash
- JBoss Enterprise Application Platform
- Ruby on Rails

### Pricing mechanism (varies by region):

- Free Trial: AWS offers an introductory free tier pricing for a year to drive cloud adoption and enable client acquisition
- On-demand instances: Priced per hour without any long-term commitments
- Reserved instance: One-time payment for each instance with a discounted hourly rate (~65% discount over hourly ondemand rates). Suitable for customers with stable volumes
- Spot instances: Customers bid on unused EC2 capacity and run those instances for as long as their maximum bid exceeds the current spot price, which changes periodically based on supply and demand

### **Service Commitment**

- AWS offers to make EC2 available with an Annual Uptime Percentage of at least 99.95% during the service year (preceding 365 days from an SLA claim)
- If the Annual Uptime Percentage for a customer drops below 99.95% for the service year, that customer is eligible to receive a Service Credit equal to 10% of their bill (excluding one-time payments for Reserved Instances) for the Eligible Credit Period.

# Amazon Web Services | Amazon Simple Storage Service (S3)



#### Amazon S3 overview

- Amazon Simple Storage Service (S3) in an online storage service. S3 provides a web services interface that can be used to store and retrieve data on-demand
- S3 provides users the functionality to write, read, and delete objects containing from 1 byte to 5 terabytes of data each, with no limits on the number of objects stored.
   Each object is stored in a "bucket" and retrieved via a unique, user-defined key
- A bucket can be stored in one of six global regions to optimize for latency, cost management, or regulatory concerns. Objects stored in one region never leave the region unless transferred explicitly by the user
- S3 provides authentication mechanisms to ensure that data is kept secure from unauthorized access. Objects can be made private or public, and rights can be granted to specific users

#### Amazon S3 clients (partial list):

- Fotepedia
- Health Department, Junta de Andalucía
- Hitachi Systems
- Hungama Digital Media Entertainment
- Indy500.com
- Netflix
- PBS
- Scribd
- U.S. Department of State
- Yelp

### **Technology overview**

- Amazon S3 provides standards-based Representational State Transfer (REST) and SOAP web services interfaces that are designed to work with any Internetdevelopment toolkit
- Default download protocol is HTTP. S3 also provides a BitTorrent protocol interface to lower costs for high-scale distribution by letting users download from Amazon and other users simultaneously (applicable only for public data)

#### **Service Commitment**

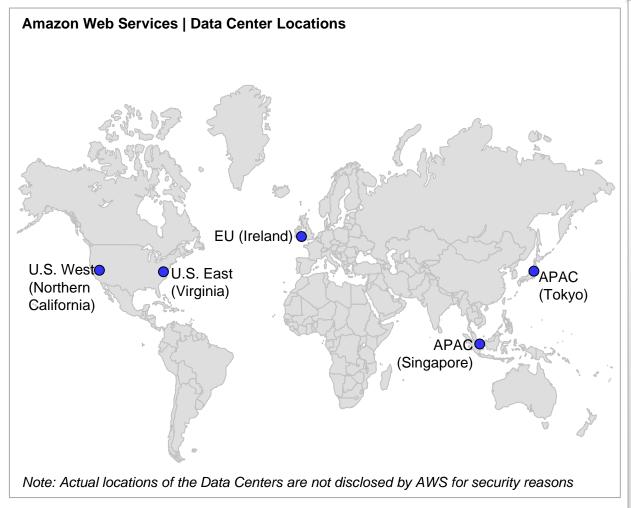
- Standard storage is designed to provide 99.99999999% durability and 99.99% availability over a given year and sustain the concurrent loss of data in two facilities
- Reduced redundancy storage allows lower costs by storing non-critical data at lower levels of redundancy. This is designed to provide 99.99% durability and 99.99% availability over a given year and sustain loss of data in a single facility
- AWS offers S3 at a Monthly Uptime Percentage of at least 99.9% during a monthly billing cycle. If the Monthly Uptime Percentage is:
  - greater than 99% but less than 99.9% the client gets a 10% service credit,
  - less than 99%, the client gets a 25% service credit for the billing cycle

### Pricing mechanism (varies by region):

- Free Trial: AWS offers an introductory free tier pricing for a year to drive cloud adoption and enable client acquisition
- Storage pricing: Price per GB for standard and reduced redundancy based on monthly storage tiers (<1 TB, 2-50 TB, 51-500 TB, etc.)
- Request pricing:
  - Price per 1,000 requests for PUT, COPY, POST, or LIST requests
  - Price per 10,000 requests for GET and other requests
- Data transfer pricing: Pricing for transferring data in and out of regions.
  - 'Data Transfer IN' charged a flat fee per GB
  - 'Data Transfer OUT' charged a fee per GB based on monthly volumes

# Amazon Web Services | Infrastructure and security





### Security and compliance

- ISO 27001 certification covering AWS infrastructure, data centers, and services including EC2, S3 and Virtual Private Cloud
- SAS 70 Type II audit reports
- PCI DSS Level 1 which enables AWS to store, process, and transmit credit card information on the cloud
- Federal Information Security
   Management Act (FISMA-Low level)
   for U.S. Government agency
   compliance . AWS is currently pursuing

   FISMA-Moderate level implementation
- Customers have built healthcare applications compliant with HIPPA's Security and Privacy Rules on AWS
- Multi-layer access controlled data centers
- Security architecture embedded in the offering to prevent unauthorized access or usage
- Optional data encryption, redundant procedures to enable data privacy

### In Summary...





What is IT Transformation?



How Does Transformation Create Business Value?



Everest Group's Next Generation IT Services

### Q&A



- Click the question mark (Q&A) button located on the floating tool bar in the bottom right of your screen – this will open the Q&A Panel
- Be sure to keep the default set to "send to All Panelist"
- Then, type your question in the rectangular field at the bottom of the Q&A box and click the send button to submit

### **Related Content**

- Drop us an email at <u>cloud@everestgrp.com</u> to join our mailing list:
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  - Consulting Practice updates
  - Cloud Research announcements
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  - : @everest\_cloud
  - : Gaining Altitude at (<u>www.everestgrp.com</u>)

### For More Information



- Attendees will receive an email with a link to download today's webinar presentation. A recording of the webinar will be available within 24 hours on our website at www.everestgrp.com/category/webinars
- For more information on cloud infrastructure economics, please contact:
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  - Cloud Team, <u>cloud@everestgrp.com</u>
- For background information on Everest Group, please visit:
  - www.everestgrp.com
  - www.everestresearchinstitute.com
- Thank you for attending today's presentation

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