

# **End User Computing Market - Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Organization Size (Large Enterprises and Small & Medium Enterprises), By Deployment (On-Premise and Cloud), By End-User (IT & Telecom, BFSI, Healthcare, Retail and Other), By Region, and By Competition, 2019-2029F**

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## **Abstracts**

Global End User Computing (EUC) Market was valued at USD 12.45 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 11.72% through 2029. Organizations are undergoing digital transformation efforts to modernize their IT infrastructure, enhance agility, and improve overall business processes. EUC solutions play a crucial role in these initiatives by providing a user-centric approach, optimizing workflows, and ensuring a consistent user experience across diverse digital environments.

### **Key Market Drivers**

#### **Increasing Demand for Remote Work Solutions**

The Global End User Computing (EUC) market is being significantly propelled by the growing demand for remote work solutions. With the evolution of the modern workforce and the advent of technologies that enable seamless remote collaboration, organizations worldwide are adopting end user computing solutions to facilitate flexible work arrangements. The COVID-19 pandemic has accelerated this trend, compelling companies to reevaluate their approach to remote work and invest in EUC solutions.

Organizations are recognizing the need to empower employees with tools that enable them to work efficiently from anywhere, ensuring productivity and collaboration are not compromised outside traditional office settings. End user computing solutions play a pivotal role in providing a consistent and secure user experience across various devices, enabling employees to access applications and data seamlessly. This increased demand for remote work solutions is a key driver pushing the growth of the Global End User Computing market.

### Advancements in Virtualization Technologies

Another crucial driver fueling the growth of the Global End User Computing market is the continuous advancements in virtualization technologies. Virtualization has become a cornerstone in EUC, allowing organizations to optimize resources, enhance security, and streamline IT management. Server virtualization, desktop virtualization, and application virtualization are integral components of end user computing solutions that contribute to improved efficiency and flexibility.

Virtual desktop infrastructure (VDI) has gained prominence as it enables centralized management of desktop environments, reducing hardware dependency and ensuring a consistent user experience across devices. Moreover, advancements such as containerization and workspace virtualization further enhance the capabilities of EUC solutions, offering a more agile and scalable IT infrastructure.

As organizations seek to modernize their IT environments and embrace digital transformation, the adoption of advanced virtualization technologies becomes essential. The ability to deliver applications and desktops in a virtualized, secure, and efficient manner is a driving force behind the sustained growth of the Global End User Computing market.

### Rising Focus on User-Centric Computing

The Global End User Computing market is experiencing a paradigm shift towards user-centric computing, emphasizing a more personalized and intuitive user experience. Traditional IT approaches are being replaced by solutions that prioritize the needs and preferences of individual users, leading to increased satisfaction and productivity.

User-centric computing involves tailoring EUC solutions to meet the unique requirements of end users, considering factors such as device preferences, application accessibility, and user interface design. The integration of artificial intelligence and

machine learning into end user computing solutions further enhances the ability to provide personalized experiences by anticipating user behavior and preferences.

Organizations are recognizing the importance of investing in technologies that prioritize user satisfaction, as engaged and satisfied employees contribute to higher productivity levels. The focus on user-centric computing is a driving force behind the innovation and development within the Global End User Computing market, shaping solutions that not only meet organizational objectives but also elevate the overall user experience.

## Key Market Challenges

### Security Concerns in a Decentralized Environment

One of the foremost challenges facing the Global End User Computing (EUC) market is the heightened security concerns in the wake of a decentralized work environment. As organizations increasingly embrace remote work solutions and distribute end user computing resources across various locations and devices, the attack surface for potential security threats expands. Ensuring the confidentiality, integrity, and availability of sensitive data becomes more complex, with a myriad of endpoints and diverse network connections.

The risk of data breaches, unauthorized access, and malicious activities poses a significant challenge for the EUC market. Cybersecurity threats such as phishing, ransomware, and endpoint attacks become more potent in a decentralized setup. Organizations must grapple with implementing robust security measures, including encryption, multi-factor authentication, and endpoint protection, to mitigate these risks. Striking a balance between providing a seamless user experience and maintaining stringent security protocols remains a persistent challenge in the dynamic landscape of end user computing.

### Integration Complexity and Interoperability Issues

The Global End User Computing market encounters a substantial challenge in dealing with the complexity of integrating diverse technologies and ensuring seamless interoperability. As organizations deploy a mix of applications, devices, and platforms to meet the varied needs of end users, the integration of these components becomes a critical concern. Incompatibility issues between legacy systems and modern end user computing solutions can hinder the cohesive functioning of the IT environment.

The challenge is not only technical but also organizational, as different departments may adopt disparate tools and technologies that need to work cohesively. Achieving a unified user experience across various devices and platforms while integrating with existing infrastructure poses a significant hurdle. Moreover, as the technology landscape evolves, staying ahead of integration challenges and ensuring that end user computing solutions remain adaptable to emerging technologies is an ongoing struggle for organizations in the EUC market.

### Balancing User Experience with Compliance and Governance

An ongoing challenge for the Global End User Computing market revolves around striking a delicate balance between providing an optimal user experience and adhering to regulatory compliance and governance requirements. As organizations strive to empower users with flexible and personalized computing environments, they must also navigate a complex landscape of data protection regulations, industry standards, and internal governance policies.

Ensuring compliance with regulations such as GDPR, HIPAA, or industry-specific standards poses challenges in terms of data handling, storage, and transmission. The need for robust data governance practices to maintain data integrity and privacy further complicates the landscape. The tension between delivering a user-centric computing experience and implementing stringent controls to meet compliance standards requires careful navigation.

Organizations in the EUC market must invest in technologies that not only enhance user productivity but also incorporate robust governance mechanisms. This includes implementing access controls, data encryption, and auditing capabilities to ensure that user activities align with regulatory requirements. Striking the right balance between user experience and compliance remains a persistent challenge as the Global End User Computing market evolves in response to dynamic technological and regulatory landscapes.

### Key Market Trends

#### Rise of Edge Computing in End User Environments

One prominent trend shaping the Global End User Computing (EUC) market is the rise of edge computing within end user environments. Edge computing involves processing data closer to the source of generation, reducing latency and enhancing real-time

decision-making. This trend is particularly impactful in end user computing, where the demand for faster response times and improved user experiences is driving the adoption of edge computing technologies.

Traditionally, end user computing relied on centralized data processing, often in cloud environments. However, with the proliferation of Internet of Things (IoT) devices and the increasing complexity of applications, there is a growing need to distribute computing resources to the edge of the network. This decentralization allows for quicker data analysis, reducing the dependency on distant data centers and enhancing the overall performance of end user computing solutions.

Edge computing in EUC is transforming how applications are delivered, making them more responsive and adaptive to user needs. It also addresses challenges related to bandwidth constraints, ensuring that data-intensive applications can function efficiently even in environments with limited network connectivity. As the Global End User Computing market evolves, the integration of edge computing technologies is becoming a pivotal trend, enabling organizations to provide a more agile, responsive, and user-centric computing experience.

#### Adoption of Artificial Intelligence and Automation in End User Computing

The adoption of artificial intelligence (AI) and automation is a transformative trend reshaping the landscape of the Global End User Computing market. Organizations are increasingly leveraging AI-driven capabilities to enhance the efficiency, security, and personalization of end user computing solutions. This trend is manifesting in various aspects of EUC, from virtual assistants and intelligent automation to predictive analytics and self-healing systems.

AI-driven virtual assistants are playing a crucial role in improving user experiences by providing natural language interfaces and automating routine tasks. These virtual assistants can assist users with troubleshooting, accessing information, and even performing actions within applications, reducing the burden on IT support teams and empowering end users to be more self-sufficient.

Automation is another key facet of this trend, streamlining IT operations and enhancing overall system efficiency. Automated provisioning, patch management, and security protocols contribute to a more secure and optimized end user computing environment. Predictive analytics powered by AI enables organizations to anticipate potential issues, preventing disruptions and proactively addressing challenges before they impact end

users.

As organizations recognize the value of AI and automation in optimizing end user computing, the market is witnessing increased investment in these technologies. The trend towards AI-driven, automated EUC solutions is expected to continue, providing organizations with the tools to deliver a more intelligent, responsive, and adaptive computing experience for end users.

## Segmental Insights

### Deployment Insights

The Cloud segment emerged as the dominating segment in 2023. The adoption of cloud computing in the end user computing market has been a significant trend. Cloud-based solutions provide a flexible and scalable infrastructure for delivering applications and services to end users. This shift to the cloud allows organizations to move away from traditional on-premises setups, reducing the need for extensive hardware investments and enabling greater agility.

Cloud-based Desktop as a Service (DaaS) and Virtual Desktop Infrastructure (VDI) solutions have gained popularity. These services allow organizations to host desktop environments and applications in the cloud, providing users with secure access from various devices. Cloud-based VDI solutions offer advantages such as easier scalability, improved resource utilization, and the ability to support remote and distributed workforces.

Many organizations are adopting hybrid and multi-cloud strategies in their end user computing environments. This involves a combination of on-premises infrastructure, private cloud, and public cloud services. Such strategies offer flexibility, allowing organizations to leverage the strengths of different cloud providers while maintaining control over critical data and applications.

## Regional Insights

North America emerged as the dominating region in 2023, holding the largest market share. The North American region has been a key driver in the adoption of remote work solutions, particularly accelerated by the COVID-19 pandemic. Organizations in the U.S. and Canada have embraced end user computing technologies to facilitate remote work, ensuring employees have secure and efficient access to applications and data from



various locations.

Various industry verticals in North America, including IT, finance, healthcare, and manufacturing, contribute significantly to the demand for end user computing solutions. Each sector has unique requirements, leading to diverse applications of EUC technologies. For example, the financial sector may prioritize security and compliance, while the healthcare sector may emphasize telehealth capabilities and data accessibility.

The adoption of cloud computing and virtualization technologies is prominent in North America. Organizations leverage cloud-based end user computing solutions for flexibility, scalability, and cost efficiency. Virtual desktop infrastructure (VDI) and Desktop as a Service (DaaS) are gaining traction, offering centralized management and improved resource utilization.

North America is a hub for technological innovation, and this reflects in the continuous advancements within the end user computing space. Companies in the region are at the forefront of developing and implementing innovative EUC solutions, including AI-driven interfaces, automation, and next-generation collaboration tools.

With a heightened awareness of cybersecurity threats, organizations in North America prioritize security features in their end user computing environments. Compliance with data protection regulations such as GDPR and HIPAA is crucial, especially in sectors like healthcare and finance, influencing the adoption of EUC solutions that incorporate robust security measures.

Government initiatives and policies in North America, such as those promoting digital transformation and the modernization of IT infrastructure, impact the adoption of end user computing solutions. Public sector organizations, in particular, are investing in EUC technologies to enhance citizen services, improve operational efficiency, and ensure secure data handling.

North America hosts a diverse vendor landscape, including global technology giants and innovative startups specializing in end user computing. Strategic partnerships and collaborations between technology providers contribute to the evolution of the market, enabling organizations to access comprehensive EUC solutions.

## Key Market Players

Nutanix, Incorporation

Fujitsu Limited

Tech Mahindra Limited

HCL Infosystems Limited

IGEL Technology GmbH

Infosys Limited

LTIMindtree Limited

NetApp, Incorporated

Nucleus Software Exports Limited

Cloud Software Group, Incorporated

#### Report Scope:

In this report, the Global End User Computing Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

End User Computing Market, By Organization Size:

Large Enterprises

Small & Medium Enterprises

End User Computing Market, By Deployment:

On-Premise

Cloud



## End User Computing Market, By End-User:

IT & Telecom

BFSI

Healthcare

Retail

Other

## End User Computing Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Netherlands

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Thailand

Malaysia

South America

Brazil

Argentina

Colombia

Chile

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global End

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User Computing Market.

Available Customizations:

Global End User Computing Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. SERVICES OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
  - 2.5.1. Secondary Research
  - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
  - 2.6.1. The Bottom-Up Approach
  - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
  - 2.8.1. Data Triangulation & Validation

### **3. EXECUTIVE SUMMARY**

### **4. IMPACT OF COVID-19 ON GLOBAL END USER COMPUTING MARKET**

### **5. VOICE OF CUSTOMER**

### **6. GLOBAL END USER COMPUTING MARKET OVERVIEW**

### **7. GLOBAL END USER COMPUTING MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast

- 7.2.1. By Organization Size (Large Enterprises and Small & Medium Enterprises)
- 7.2.2. By Deployment (On-Premise and Cloud)
- 7.2.3. By End-User (IT & Telecom, BFSI, Healthcare, Retail and Other)
- 7.2.4. By Region (North America, Europe, South America, Middle East & Africa, Asia-Pacific)
- 7.3. By Company (2023)
- 7.4. Market Map

## **8. NORTH AMERICA END USER COMPUTING MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Organization Size
  - 8.2.2. By Deployment
  - 8.2.3. By End-User
  - 8.2.4. By Country
- 8.3. North America: Country Analysis
  - 8.3.1. United States End User Computing Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Organization Size
      - 8.3.1.2.2. By Deployment
      - 8.3.1.2.3. By End-User
  - 8.3.2. Canada End User Computing Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Organization Size
      - 8.3.2.2.2. By Deployment
      - 8.3.2.2.3. By End-User
  - 8.3.3. Mexico End User Computing Market Outlook
    - 8.3.3.1. Market Size & Forecast
      - 8.3.3.1.1. By Value
    - 8.3.3.2. Market Share & Forecast
      - 8.3.3.2.1. By Organization Size
      - 8.3.3.2.2. By Deployment
      - 8.3.3.2.3. By End-User

## 9. EUROPE END USER COMPUTING MARKET OUTLOOK

### 9.1. Market Size & Forecast

#### 9.1.1. By Value

### 9.2. Market Share & Forecast

#### 9.2.1. By Organization Size

#### 9.2.2. By Deployment

#### 9.2.3. By End-User

#### 9.2.4. By Country

### 9.3. Europe: Country Analysis

#### 9.3.1. Germany End User Computing Market Outlook

##### 9.3.1.1. Market Size & Forecast

###### 9.3.1.1.1. By Value

##### 9.3.1.2. Market Share & Forecast

###### 9.3.1.2.1. By Organization Size

###### 9.3.1.2.2. By Deployment

###### 9.3.1.2.3. By End-User

#### 9.3.2. France End User Computing Market Outlook

##### 9.3.2.1. Market Size & Forecast

###### 9.3.2.1.1. By Value

##### 9.3.2.2. Market Share & Forecast

###### 9.3.2.2.1. By Organization Size

###### 9.3.2.2.2. By Deployment

###### 9.3.2.2.3. By End-User

#### 9.3.3. United Kingdom End User Computing Market Outlook

##### 9.3.3.1. Market Size & Forecast

###### 9.3.3.1.1. By Value

##### 9.3.3.2. Market Share & Forecast

###### 9.3.3.2.1. By Organization Size

###### 9.3.3.2.2. By Deployment

###### 9.3.3.2.3. By End-User

#### 9.3.4. Italy End User Computing Market Outlook

##### 9.3.4.1. Market Size & Forecast

###### 9.3.4.1.1. By Value

##### 9.3.4.2. Market Share & Forecast

###### 9.3.4.2.1. By Organization Size

###### 9.3.4.2.2. By Deployment

###### 9.3.4.2.3. By End-User

- 9.3.5. Spain End User Computing Market Outlook
  - 9.3.5.1. Market Size & Forecast
    - 9.3.5.1.1. By Value
  - 9.3.5.2. Market Share & Forecast
    - 9.3.5.2.1. By Organization Size
    - 9.3.5.2.2. By Deployment
    - 9.3.5.2.3. By End-User
- 9.3.6. Netherlands End User Computing Market Outlook
  - 9.3.6.1. Market Size & Forecast
    - 9.3.6.1.1. By Value
  - 9.3.6.2. Market Share & Forecast
    - 9.3.6.2.1. By Organization Size
    - 9.3.6.2.2. By Deployment
    - 9.3.6.2.3. By End-User
- 9.3.7. Belgium End User Computing Market Outlook
  - 9.3.7.1. Market Size & Forecast
    - 9.3.7.1.1. By Value
  - 9.3.7.2. Market Share & Forecast
    - 9.3.7.2.1. By Organization Size
    - 9.3.7.2.2. By Deployment
    - 9.3.7.2.3. By End-User

## **10. SOUTH AMERICA END USER COMPUTING MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Organization Size
  - 10.2.2. By Deployment
  - 10.2.3. By End-User
  - 10.2.4. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil End User Computing Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Organization Size
      - 10.3.1.2.2. By Deployment
      - 10.3.1.2.3. By End-User



### 10.3.2. Colombia End User Computing Market Outlook

#### 10.3.2.1. Market Size & Forecast

##### 10.3.2.1.1. By Value

#### 10.3.2.2. Market Share & Forecast

##### 10.3.2.2.1. By Organization Size

##### 10.3.2.2.2. By Deployment

##### 10.3.2.2.3. By End-User

### 10.3.3. Argentina End User Computing Market Outlook

#### 10.3.3.1. Market Size & Forecast

##### 10.3.3.1.1. By Value

#### 10.3.3.2. Market Share & Forecast

##### 10.3.3.2.1. By Organization Size

##### 10.3.3.2.2. By Deployment

##### 10.3.3.2.3. By End-User

### 10.3.4. Chile End User Computing Market Outlook

#### 10.3.4.1. Market Size & Forecast

##### 10.3.4.1.1. By Value

#### 10.3.4.2. Market Share & Forecast

##### 10.3.4.2.1. By Organization Size

##### 10.3.4.2.2. By Deployment

##### 10.3.4.2.3. By End-User

## **11. MIDDLE EAST & AFRICA END USER COMPUTING MARKET OUTLOOK**

### 11.1. Market Size & Forecast

#### 11.1.1. By Value

### 11.2. Market Share & Forecast

#### 11.2.1. By Organization Size

#### 11.2.2. By Deployment

#### 11.2.3. By End-User

#### 11.2.4. By Country

### 11.3. Middle East & Africa: Country Analysis

#### 11.3.1. Saudi Arabia End User Computing Market Outlook

##### 11.3.1.1. Market Size & Forecast

##### 11.3.1.1.1. By Value

##### 11.3.1.2. Market Share & Forecast

##### 11.3.1.2.1. By Organization Size

##### 11.3.1.2.2. By Deployment

##### 11.3.1.2.3. By End-User

- 11.3.2. UAE End User Computing Market Outlook
  - 11.3.2.1. Market Size & Forecast
    - 11.3.2.1.1. By Value
  - 11.3.2.2. Market Share & Forecast
    - 11.3.2.2.1. By Organization Size
    - 11.3.2.2.2. By Deployment
    - 11.3.2.2.3. By End-User
- 11.3.3. South Africa End User Computing Market Outlook
  - 11.3.3.1. Market Size & Forecast
    - 11.3.3.1.1. By Value
  - 11.3.3.2. Market Share & Forecast
    - 11.3.3.2.1. By Organization Size
    - 11.3.3.2.2. By Deployment
    - 11.3.3.2.3. By End-User
- 11.3.4. Turkey End User Computing Market Outlook
  - 11.3.4.1. Market Size & Forecast
    - 11.3.4.1.1. By Value
  - 11.3.4.2. Market Share & Forecast
    - 11.3.4.2.1. By Organization Size
    - 11.3.4.2.2. By Deployment
    - 11.3.4.2.3. By End-User

## **12. ASIA-PACIFIC END USER COMPUTING MARKET OUTLOOK**

- 12.1. Market Size & Forecast
  - 12.1.1. By Value
- 12.2. Market Share & Forecast
  - 12.2.1. By Organization Size
  - 12.2.2. By Deployment
  - 12.2.3. By End-User
  - 12.2.4. By Country
- 12.3. Asia-Pacific: Country Analysis
  - 12.3.1. China End User Computing Market Outlook
    - 12.3.1.1. Market Size & Forecast
      - 12.3.1.1.1. By Value
    - 12.3.1.2. Market Share & Forecast
      - 12.3.1.2.1. By Organization Size
      - 12.3.1.2.2. By Deployment
      - 12.3.1.2.3. By End-User

- 12.3.2. India End User Computing Market Outlook
  - 12.3.2.1. Market Size & Forecast
    - 12.3.2.1.1. By Value
  - 12.3.2.2. Market Share & Forecast
    - 12.3.2.2.1. By Organization Size
    - 12.3.2.2.2. By Deployment
    - 12.3.2.2.3. By End-User
- 12.3.3. Japan End User Computing Market Outlook
  - 12.3.3.1. Market Size & Forecast
    - 12.3.3.1.1. By Value
  - 12.3.3.2. Market Share & Forecast
    - 12.3.3.2.1. By Organization Size
    - 12.3.3.2.2. By Deployment
    - 12.3.3.2.3. By End-User
- 12.3.4. South Korea End User Computing Market Outlook
  - 12.3.4.1. Market Size & Forecast
    - 12.3.4.1.1. By Value
  - 12.3.4.2. Market Share & Forecast
    - 12.3.4.2.1. By Organization Size
    - 12.3.4.2.2. By Deployment
    - 12.3.4.2.3. By End-User
- 12.3.5. Australia End User Computing Market Outlook
  - 12.3.5.1. Market Size & Forecast
    - 12.3.5.1.1. By Value
  - 12.3.5.2. Market Share & Forecast
    - 12.3.5.2.1. By Organization Size
    - 12.3.5.2.2. By Deployment
    - 12.3.5.2.3. By End-User
- 12.3.6. Thailand End User Computing Market Outlook
  - 12.3.6.1. Market Size & Forecast
    - 12.3.6.1.1. By Value
  - 12.3.6.2. Market Share & Forecast
    - 12.3.6.2.1. By Organization Size
    - 12.3.6.2.2. By Deployment
    - 12.3.6.2.3. By End-User
- 12.3.7. Malaysia End User Computing Market Outlook
  - 12.3.7.1. Market Size & Forecast
    - 12.3.7.1.1. By Value
  - 12.3.7.2. Market Share & Forecast

- 12.3.7.2.1. By Organization Size
- 12.3.7.2.2. By Deployment
- 12.3.7.2.3. By End-User

## **13. MARKET DYNAMICS**

- 13.1. Drivers
- 13.2. Challenges

## **14. MARKET TRENDS AND DEVELOPMENTS**

## **15. COMPANY PROFILES**

- 15.1. Nutanix, Incorporation
  - 15.1.1. Business Overview
  - 15.1.2. Key Revenue and Financials
  - 15.1.3. Recent Developments
  - 15.1.4. Key Personnel/Key Contact Person
  - 15.1.5. Key Product/Services Offered
- 15.2. Fujitsu Limited
  - 15.2.1. Business Overview
  - 15.2.2. Key Revenue and Financials
  - 15.2.3. Recent Developments
  - 15.2.4. Key Personnel/Key Contact Person
  - 15.2.5. Key Product/Services Offered
- 15.3. Tech Mahindra Limited
  - 15.3.1. Business Overview
  - 15.3.2. Key Revenue and Financials
  - 15.3.3. Recent Developments
  - 15.3.4. Key Personnel/Key Contact Person
  - 15.3.5. Key Product/Services Offered
- 15.4. HCL Infosystems Limited
  - 15.4.1. Business Overview
  - 15.4.2. Key Revenue and Financials
  - 15.4.3. Recent Developments
  - 15.4.4. Key Personnel/Key Contact Person
  - 15.4.5. Key Product/Services Offered
- 15.5. IGEL Technology GmbH
  - 15.5.1. Business Overview

- 15.5.2. Key Revenue and Financials
- 15.5.3. Recent Developments
- 15.5.4. Key Personnel/Key Contact Person
- 15.5.5. Key Product/Services Offered
- 15.6. Infosys Limited
  - 15.6.1. Business Overview
  - 15.6.2. Key Revenue and Financials
  - 15.6.3. Recent Developments
  - 15.6.4. Key Personnel/Key Contact Person
  - 15.6.5. Key Product/Services Offered
- 15.7. LTIMindtree Limited
  - 15.7.1. Business Overview
  - 15.7.2. Key Revenue and Financials
  - 15.7.3. Recent Developments
  - 15.7.4. Key Personnel/Key Contact Person
  - 15.7.5. Key Product/Services Offered
- 15.8. NetApp, Incorporated
  - 15.8.1. Business Overview
  - 15.8.2. Key Revenue and Financials
  - 15.8.3. Recent Developments
  - 15.8.4. Key Personnel/Key Contact Person
  - 15.8.5. Key Product/Services Offered
- 15.9. Nucleus Software Exports Limited
  - 15.9.1. Business Overview
  - 15.9.2. Key Revenue and Financials
  - 15.9.3. Recent Developments
  - 15.9.4. Key Personnel/Key Contact Person
  - 15.9.5. Key Product/Services Offered
- 15.10. Cloud Software Group, Incorporated
  - 15.10.1. Business Overview
  - 15.10.2. Key Revenue and Financials
  - 15.10.3. Recent Developments
  - 15.10.4. Key Personnel/Key Contact Person
  - 15.10.5. Key Product/Services Offered

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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