

# Hybrid Enterprise Cloud Services 2022–2023 RadarView: Report Excerpt

Leveraging the hybrid cloud for  
faster time-to-market

January 2023



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## RadarView

1

Cloud continues to be a top spending priority for businesses. Companies want to use the cloud to address key issues including speed to market and customer experience. Hybrid cloud is best suited to accomplish these tasks.

2

**Avasant's** interactions with digital enterprise leaders indicate that they want to automate cloud operations for faster rollout of features and upgrades to deliver personalized products and services. But they face challenges in managing the services and platforms effectively hosted across the cloud and need more competent resources to handle the overall environment.

3

The *Hybrid Enterprise Cloud Services 2022–2023 RadarView* helps enterprises use the hybrid cloud in their go-to-market strategy and quickly deploy new applications and new functionality. It also provides information to help enterprises identify the right cloud service provider to aid that plan.

4

Avasant evaluated 40 cloud service providers through a rigorous methodology across key dimensions of practice maturity, partner ecosystem, and investments and innovation. Of these, we recognized 28 hybrid cloud service providers that brought the most value to the market over the past 12 months.

5

We also highlight the current backdrop of the market and our view on the road ahead for enterprises leveraging hybrid enterprise cloud services over the next 12 to 18 months.






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# Executive summary

# Defining hybrid enterprise cloud managed services

	Public cloud 	Private cloud 	On-premises 
Hybrid environment	✓ ✓ ✗ ✓	✓ ✗ ✓ ✓	✗ ✓ ✓ ✓

A hybrid environment must include workloads (compute, storage, data, services, and applications) spread over at least two out of three computing models.

Multicloud environment

A multicloud environment can be defined as consisting of one of the following:

- at least two public clouds
- at least two private clouds
- at least one public and one private cloud

Hybrid enterprise cloud managed services

Hybrid enterprise cloud managed services are those offerings and capabilities from service providers that help enterprises strategize, implement, integrate, and orchestrate their hybrid IT environments while adhering to security, compliance, and backup/disaster recovery requirements.



# Key enterprise hybrid cloud trends shaping the market

## Hybrid cloud and multicloud adoption is increasing

- About 89% of cloud adopters utilize hybrid cloud, whereas 76% of cloud adopters deploy multicloud. Hybrid cloud use has increased as companies use it to overcome key hurdles including security, compliance, and governance.
- However, customer expectations of hybrid cloud deployments have changed over time. Business leaders are expecting faster release of updates and improved customer experience (CX).

## DevOps and SRE are enabling faster time to market

- Enterprises are continuously looking for ways to improve technology, optimize processes and move to a higher velocity operating model to deliver personalized products and services to their customers.
- They are implementing DevOps and site reliability engineering (SRE) principles to expedite updates, reduce infra-provisioning time, and improve productivity.

## Implementation of intelligent products and services is aiding faster delivery

- Enterprises are using AI for observability and monitoring, intelligent automation, event management, predictive analytics, reporting, data management, and IT service management.
- Intelligent products and services have further helped reduce time to market through automation of data collection, seamless scalability of services, and easy detection of operational deviations.

## Enterprises embracing hybrid cloud solutions from the cloud platforms

- Enterprises are embracing hybrid cloud solutions to gain benefits like better integration with cloud platforms, adherence to data residency issues, extended security and scalability to on-premises infrastructure, and reduced expenses by eliminating data centers.
- About 17% of organizations have opted to deploy Azure VMware solutions to support their hybrid cloud deployments. Arc/Stack ACI closely follow at 13%.

# Enterprise hybrid cloud adoption: The road ahead



Data-driven cloud decision frameworks help improve business value

- Business leaders are looking for data-driven and metrics-driven operations to improve operational performance, productivity, and CX.
- They are looking for solutions to facilitate a data-driven cloud decision framework. This includes efficient environment discovery, capturing critical requirements, identifying IaaS, PaaS, and SaaS, and implementing in a hybrid cloud environment.

CX is directly linked to brand reputation

- With rapid SaaS adoption by technology companies, customers expect faster onboarding and superior experience with product usage.
- Enterprises are deploying a DevOps-enabled approach to transition applications and services to the cloud with a higher velocity. Also, it helps to improve products at a faster pace than traditional ways of migration and infrastructure management processes.

Greater collaboration among service and platform providers

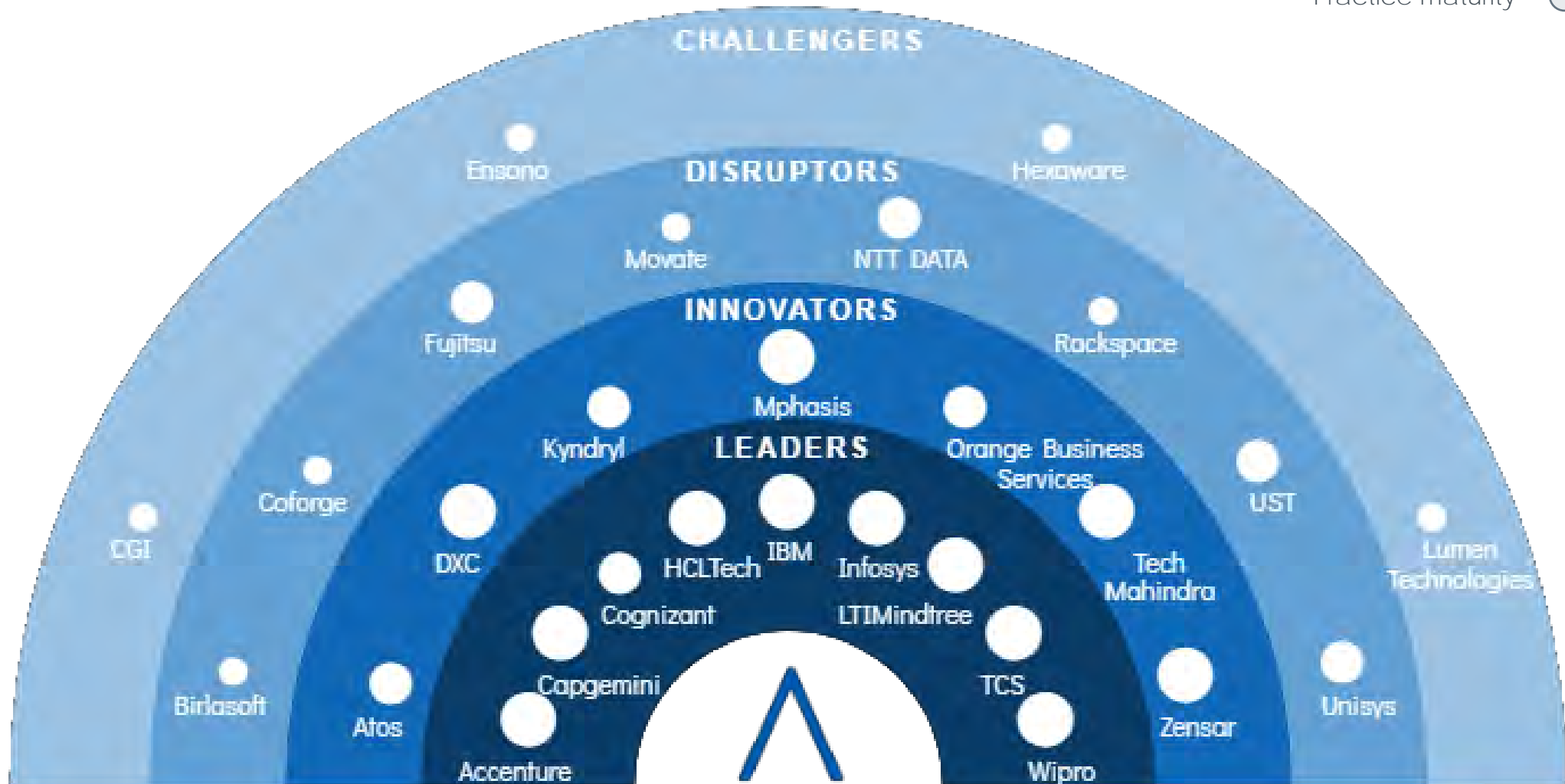
- Enterprises are looking for service providers who are continuously strengthening their collaboration with cloud platform providers by developing industry-specific solutions, increasing the number of certified employees, and creating innovative tools or accelerators.
- All the major service providers have created dedicated business units with cloud platform providers. We expect this approach to be adopted by midtier and other providers.

Developing a transparent IT architecture

- As the IT landscape is becoming complex with multicloud and hybrid cloud infrastructure, enterprises are looking to develop an IT architecture with governance to ensure organizations know where their data and processing is happening and why. This will affect development and overall operations.
- A transparent IT architecture will also help improve cloud workload resource configurations and protect sensitive data while building and running the workloads anywhere.

# Avasant recognizes 28 top-tier providers supporting business adoption of hybrid enterprise cloud services

Practice maturity ○ ○ ○





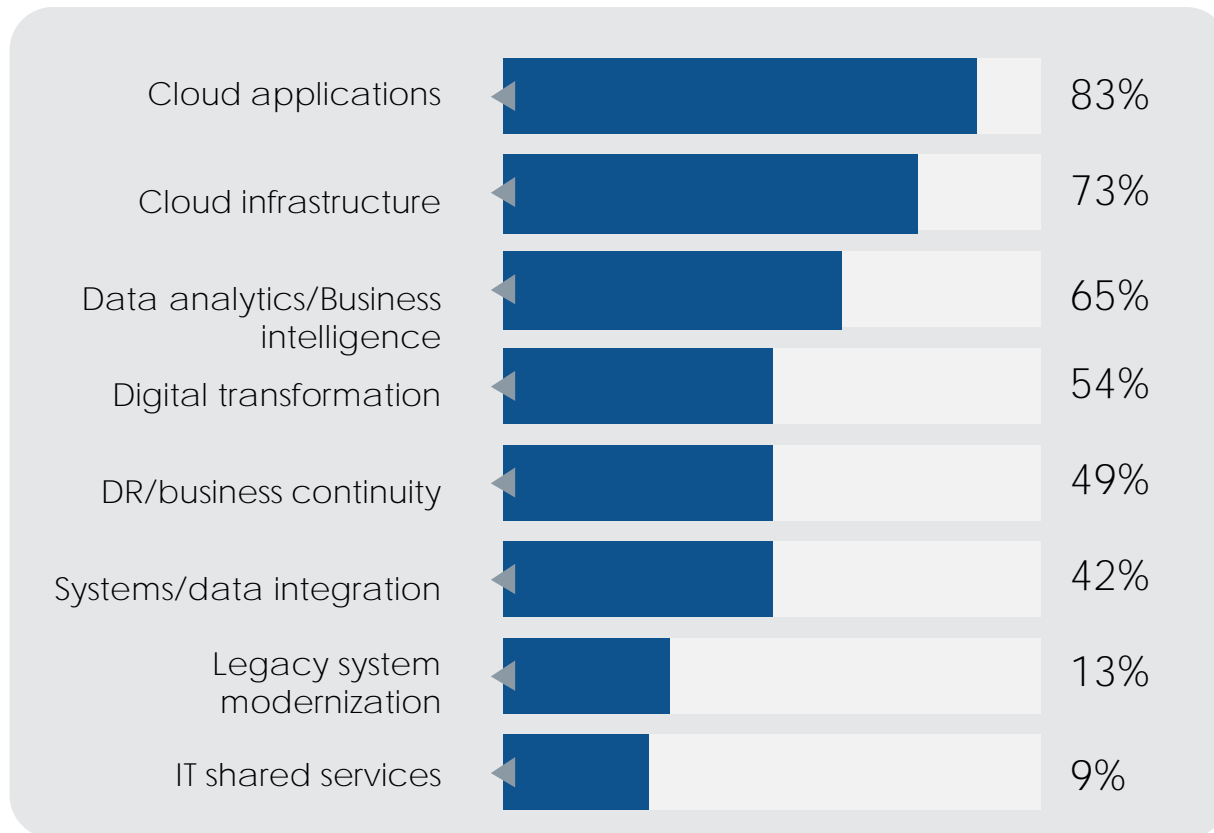
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Current backdrop

# Cloud remains the top spending priority

Spending priorities by IT initiative

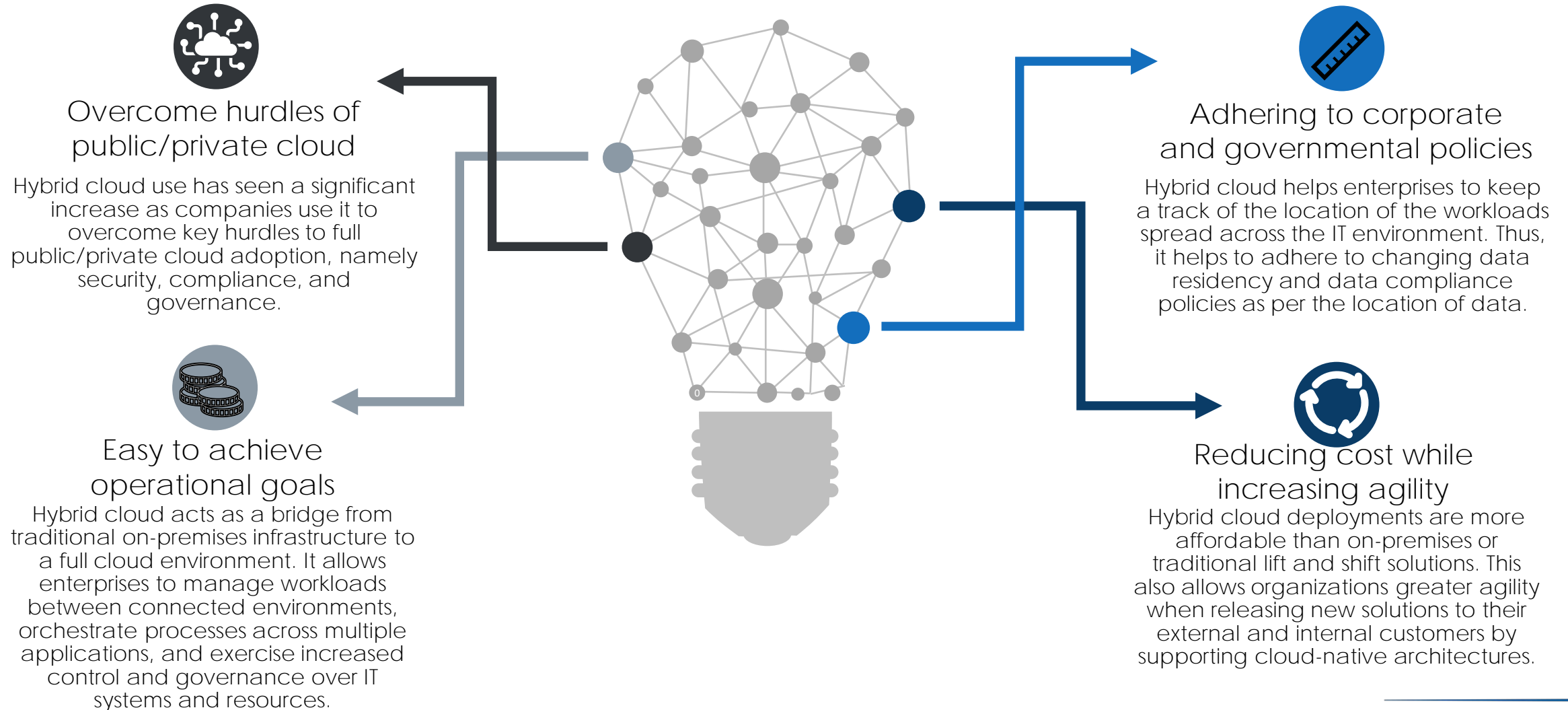


- Continuing the trend from recent years, the cloud is the top spending priority. Both cloud applications and cloud infrastructure lead the way.
- A net 83% of enterprises are increasing their spending on cloud applications. Cloud infrastructure, at 73%, also continues to be a major priority.
- This trend is expected to continue, as the economic and strategic advantages of an elastic and scalable approach are needed during disruptive times.
- Data analytics/business intelligence follows in third place at 65%.



# Hybrid cloud is becoming a natural choice for data integration and secure experiences

About 89% of cloud adopters utilize the hybrid cloud, whereas 76% deploy multicloud. The significant increase in hybrid cloud and multicloud is due to their multiple benefits.

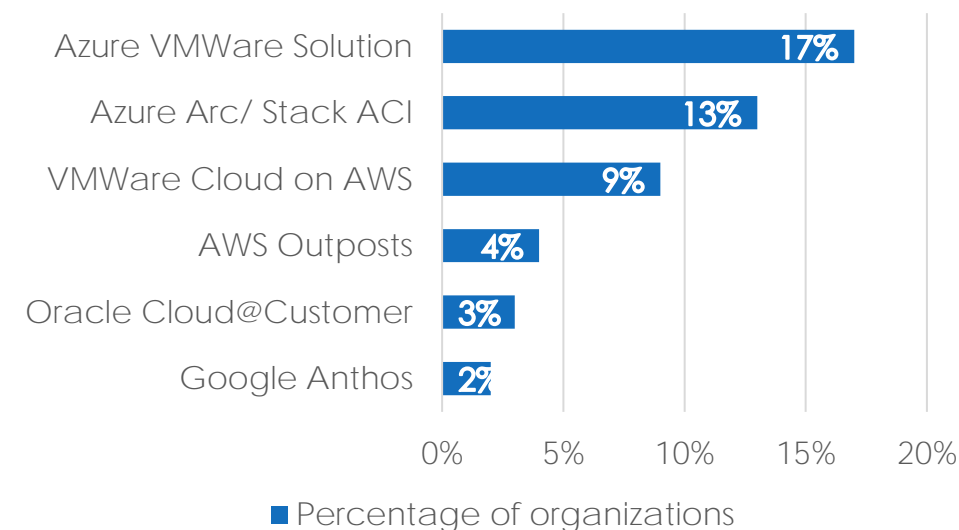


# Enterprises are embracing hybrid cloud solutions from cloud platform providers instead of on-premises environments

Hybrid cloud solutions provide benefits like better integration with cloud platforms, adherence to data residency issues, extended security and scalability to on-premises infrastructure, and reduced expenses through the elimination of data center

Enterprises	Benefits achieved
	<ul style="list-style-type: none"> <li>Sanofi migrated more than 15,000 servers and 1,800 apps on Azure and Azure VMWare Solution.</li> <li>The company also leveraged Azure hybrid cloud to scale and develop applications faster with Azure automation. This improved time to market for its products.</li> </ul>
	<ul style="list-style-type: none"> <li>Tipico leveraged AWS Outposts to enter the US market as it needed to comply with data residency requirements.</li> <li>AWS Outposts reused Tipico's existing infrastructure code for deployment, reducing the company's efforts to write new code.</li> </ul>
	<ul style="list-style-type: none"> <li>The company deployed Microsoft Azure Stack HCI to extend the security and scalability features of the cloud to its on-premises infrastructure.</li> <li>It helped the company to tackle the problem of limited cloud availability in its region, along with the reduced cost of ownership, optimized infrastructure utilization, and greater flexibility.</li> </ul>
	<ul style="list-style-type: none"> <li>The bank deployed Oracle Exadata Cloud@Customer database at its data center. The database helped the company improve server efficiency and reduce expenses.</li> <li>It also delivered lower network latency than public clouds, which critical banking applications need.</li> </ul>

## Hybrid cloud technologies deployed




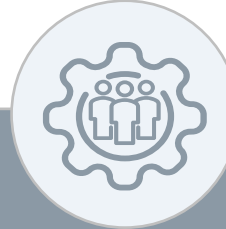






The graph shows that enterprises prefer hybrid cloud solutions from Azure more than other cloud platform providers to combine on-premises infrastructure with public cloud potential.



# Companies are increasingly looking at hybrid cloud to develop customer-centric services

Hybrid cloud offers data integration, orchestration of workloads, security, and other factors that make it best suited for these types of services.

 <h2>Improving CX</h2>	 <h2>Faster onboarding of capabilities</h2>	 <h2>Implementing ESG initiatives</h2>	 <h2>Achieving operational excellence</h2>
<ul style="list-style-type: none"><li>Enterprises are looking to transform business models to augment their capabilities and deliver faster results to their customers.</li><li>They are more interested to adopt “as-a-service” models for faster onboarding.</li></ul>	<ul style="list-style-type: none"><li>To stay relevant in the highly competitive and evolving marketplace, enterprises are looking to adopt agile, DevOps, and low-code/no-code principles to innovate customer solutions faster.</li></ul>	<ul style="list-style-type: none"><li>Cloud remains only of the primary drivers of reducing emissions through the elimination of on-premises services</li><li>Additionally, they are looking for cloud solutions to help them achieve sustainability-related targets faster.</li></ul>	<ul style="list-style-type: none"><li>Enterprises are looking to implement intelligent and automated system control on the cloud based on AI/ML to gain better insights from their data.</li><li>This will identify any glitches and improve overall operations.</li></ul>
<p> Designed an SAP system with SaaS solutions to effectively handle customers while pushing out updates</p>	<p> Implemented an agile methodology using the Azure DevOps tool to track and maximize employee productivity</p>	<p> Added environmental and social factors to its supplier evaluation criteria to reduce its carbon footprint</p>	<p> Deployed an intelligent airline operations solution on AWS cloud to detect operational deviations and mitigate them faster</p>

# Enterprises are implementing DevOps and SRE principles for accelerated delivery of products to market



Many companies using DevOps who were hesitant to migrate to the cloud due to security or other considerations prefer hybrid cloud as it provides developers with the required performance and reliability.

## Benefits achieved

## Illustrative enterprise examples

### Faster release of updates

- By leveraging DevOps and SRE, enterprises are enhancing product release cycles.
- Both approaches utilize automation and collaboration to ensure the reliability of the software developed.



- Reconstructed its legacy billing systems using microservices. It implemented SLA-driven services for service assurance, DevOps, and real-time monitoring. The cloud-native architecture halved manual steps, reducing ideation to execution time from months to days

### Reduction in infra-provisioning time

- Infrastructure as code (IaC) uses the DevOps methodology and versioning to deploy infrastructures, such as networks, virtual machines, and load balancers.
- Thus, IaC templatizes the deployment of infrastructure, reducing infra-provisioning time.



- Reduced the infrastructure provisioning time for critical workloads by templating the CI/CD pipeline across different technology stacks for reusability. It implemented fully automated CI/CD pipelines for build and deployments with integrated security interventions.

### Improve developers' productivity

- DevOps and SRE invoke a sense of collaboration between the teams. Developers can coordinate with the operations teams faster to resolve any issue.



- Implemented a 24x7 DevOps pipeline and CI/CD life cycle management system for over 100 of its products. It utilized an SRE framework by co-locating teams with the developers, leading to over 20% improvement in productivity.




# Enterprises are adopting cloud-based intelligent products and services to streamline business processes



## Illustrative examples

How intelligent tools and platforms ensure faster time to market

Enterprise	Illustrative case study
<p>A Spanish multinational telecommunications company</p>	<p>Partnered with Wipro to develop a telecom network cloud automation solution that gathers network function requirements from any OEM provider and onboards network functions and services in any underlying cloud platform to meet the requirements. The solution enables a seamless 5G and edge application launch with a short turnaround time.</p>
<p>An American multinational food and beverage company</p>	<p>Executed a multiyear operational transformation plan, called Factory 2025, with Capgemini. The plan focuses on building precision and data-driven manufacturing capabilities. The company implemented a plant execution playbook for over 50 of its sites to achieve better scalability. It deployed Azure IoT Edge Architecture and integrated it with its existing infrastructure to develop IoT solutions using Azure PaaS.</p>
	<p>Modernized its operations with TCS Aviana™, an intelligent airline operations solution built on AWS cloud. United used Amazon MSK for real-time processing of operational data, Amazon EMR for large-scale parallel data processing, and Amazon Open Search for accelerated data retrieval. The data helped in generating insights to predict and mitigate operational issues.</p>

Achieved speed to market with the ability to onboard network functions and new-age business edge applications within three weeks, compared to three months previously

Achieved a 1% net plant efficiency gain in the first year across more than 50 manufacturing plants. It aims to achieve a 2% net productivity gains each year until 2025.

Configured over 500 operations anomalies and identified nearly 400 business events per second for immediate remediation. This provided real-time travel intelligence to all stakeholders.





# Service provider investments amid the current landscape



# Service providers are developing assets and accelerators that facilitate a customized cloud transformation strategy

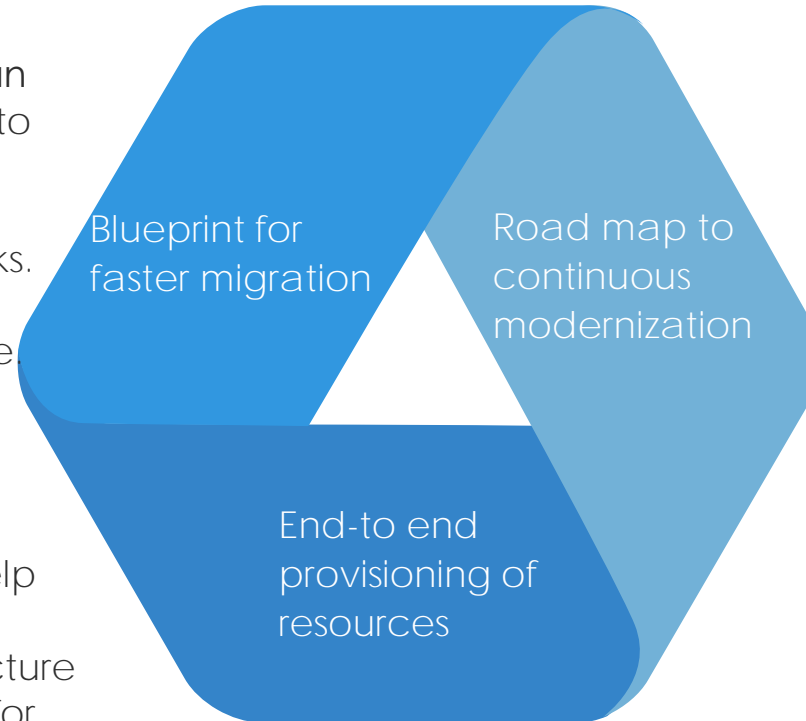
Service providers are building tools and accelerators that provide blueprints for faster migration, enable end-to-end provisioning of resources, and create a road map for continuous modernization.



Capgemini's Cloud Migration Factory provides an industrialized approach for migrating workloads to the public cloud. It implements the solutions best suited to clients' applications and business goals and migrates their workloads while minimizing risks. It drives end-to-end migration, from package to production, using an automated release pipeline.



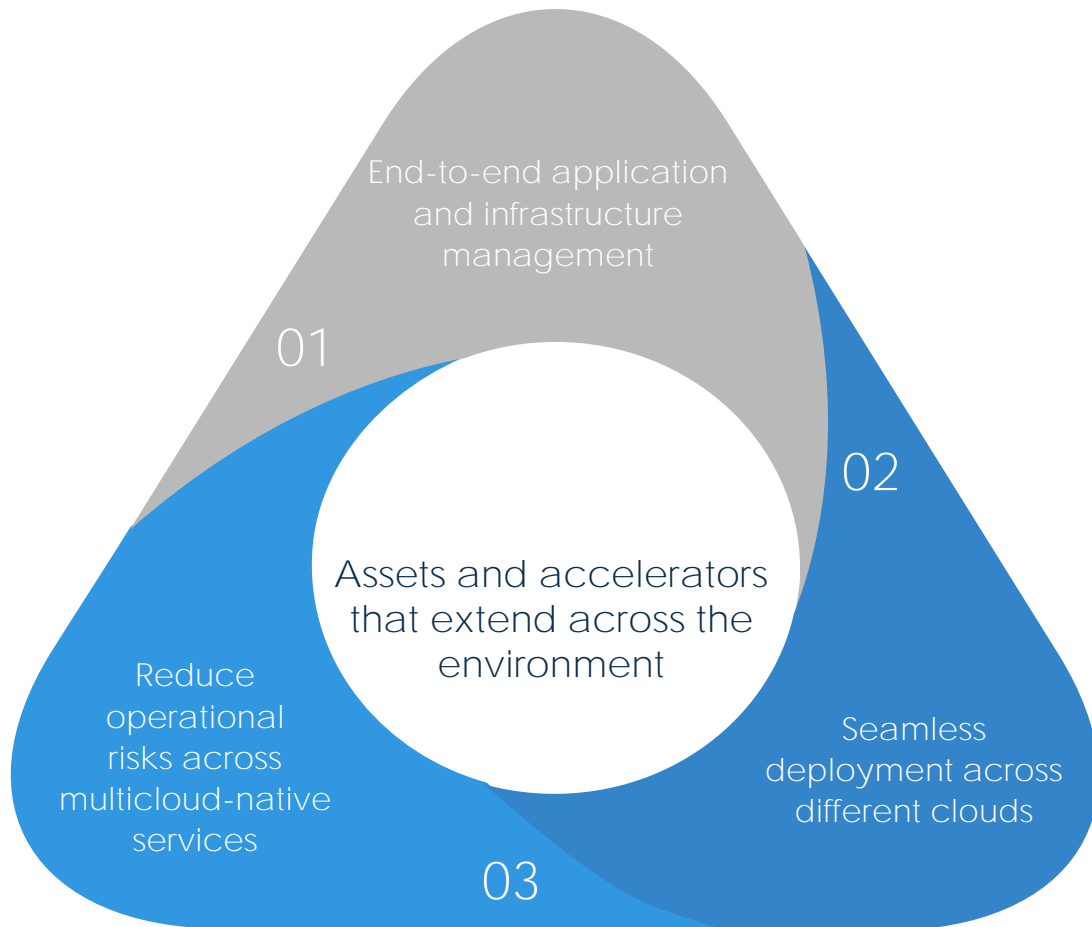
LTIMindtree's Infinity platform provides a suite of modern engineering tools and processes that help enterprises with cloud life cycle assessment and management. It encompasses tools for infrastructure assessment of on-premises application portfolio for cloud-readiness and takes care of automated provisioning of infra and PaaS services across multicloud environments.



HCLTech's Cloud Insight Platform provides a blueprint for continuous modernization by identifying migration clusters, preparing a road map, and utilizing highly automated and cost-effective application migration factories. These include portfolio discovery engagement for identifying applications for optimization, migration, modernization, and decommissioning and archival.

# Service providers are also ensuring seamless performance across a hybrid cloud environment

Service providers are providing tools and accelerators that extend across hybrid and multicloud environments and ensure seamless performance.



## LTIMindtree

1

LTIMindtree's Digital Hybrid Infrastructure Platform provides a comprehensive solution to enterprise customers to manage hybrid multiclouds with hyper-automation, observability, and AI-enabled digital services for complete, app-centric management.



2

Wipro's Cloud App Risk Governance solution offers a single-pane-of-glass view for continuous security controls management across a multicloud environment. It also provides insights into various operational risks introduced in the cloud and offers recommendations for fixing them.

## HCLTech

3

HCLTech SoFy enables enterprises to deploy enterprise application in minutes across any cloud (public and private) and help scale the applications without hassle. This cloud-native platform also helps to avoid any vendor lock-in.

Note: Examples from select Hybrid Enterprise Cloud service providers

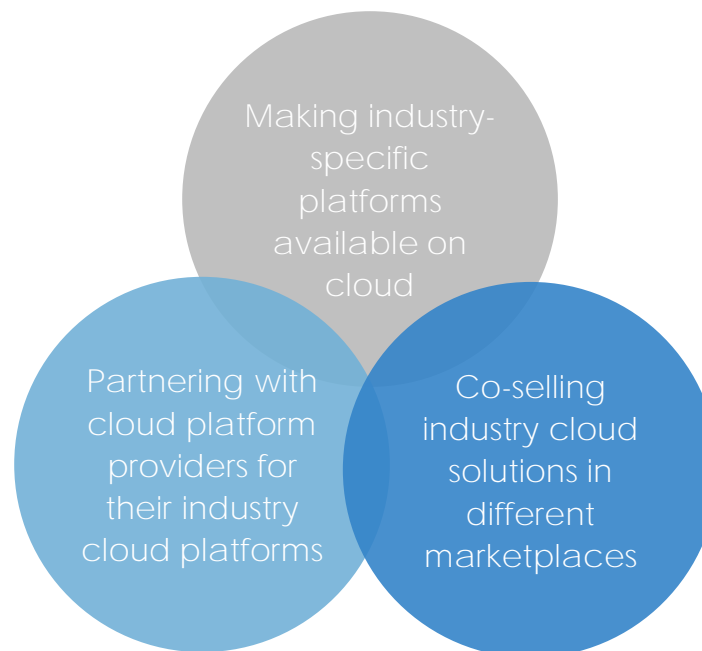
Source: Avasant research

# Service providers are moving to industry cloud platforms for faster implementations

Service providers are shifting from developing industry cloud solutions to industry cloud platforms that can be implemented across hybrid clouds for achieving faster business outcomes.



In January 2022, TCS became a launch partner for Microsoft Cloud for Retail. Through this partnership, TCS plans to leverage Microsoft Cloud for Retail to accelerate cloud transformation strategies for its retail customers. Microsoft Cloud for Retail leverages various Microsoft technologies to facilitate the end-to-end shopper journey with integrated and intelligent capabilities.



Infosys has developed multiple industry-specific solutions such as Helix, Equinox, Finacle, Private 5G, and Energy Cloud and made them available on different cloud platforms to ensure better scalability.



HCLTech has developed industry cloud solutions, such as Digital Treasury as a Service and CoTrust Blockchain Platform for BFSI; CARE solution for healthcare and life sciences, and HCL Smart Water Analytics Solution for water utilities. These are readily available across marketplaces of cloud platform providers.



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# RadarView overview



# Avasant's Hybrid Enterprise Cloud Services RadarView 2022–2023 assesses service providers across three critical dimensions



## Practice maturity

- This dimension considers the current state of a provider's hybrid enterprise cloud services practice in terms of its strategic importance for the provider, the maturity of their offerings and capabilities, and client engagement.
- The width and depth of the client base, usage of proprietary/outsourced tools and platforms, and the quality of talent and execution capabilities are all important factors that contribute to this dimension.

## Partner ecosystem

- This dimension assesses the provider's partnerships and its engagements. It evaluates the objective of the partnerships (for example, codevelopment or co-innovation) and its engagement with technology solutions or product providers, startup communities, and industry associations.
- The kind of joint development programs around offerings, go-to-market approaches, the overall depth of partnerships, and their ability to deliver superior value to clients are all important aspects.

## Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction in the hybrid enterprise cloud services space.
- The overall strategic investments, both organic and inorganic ones, toward capability and offering growth, technology development, and human capital development, along with innovations the service provider develops, are critical aspects of this dimension.

## Avasant based its analysis on several sources

**Public disclosures** Publicly available information such as Securities and Exchange Council filings, annual reports, quarterly earnings calls, executive interviews, and statements

**Market interactions** Discussions with enterprise executives leading digital initiatives and influencing the selection of and engagement with hybrid cloud service providers

**Provider inputs** Inputs collected through an online questionnaire and structured briefings during September 2022–October 2022

Of the 40 service providers assessed, the final 28 featured in the Hybrid Enterprise Cloud Services RadarView for 2022–2023 are:

Note: Assessments for Accenture, Atos, CGI, Coforge, Cognizant, DXC, Fujitsu, Hexaware, Kyndryl, Lumen, Mindtree, NTT Data, and UST have been conducted based on public disclosures and market interactions only.





# Hybrid Enterprise Cloud Services 2022–2023 RadarView



## Avasant has recognized hybrid cloud service providers across four classifications



Leaders show consistent excellence across all the key dimensions of the RadarView assessment, practice maturity, partner ecosystem, and investments and innovation, and have had a superior impact on the market as a whole. These providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in their space, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate in a few select areas or industries and distinguish themselves based on superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.



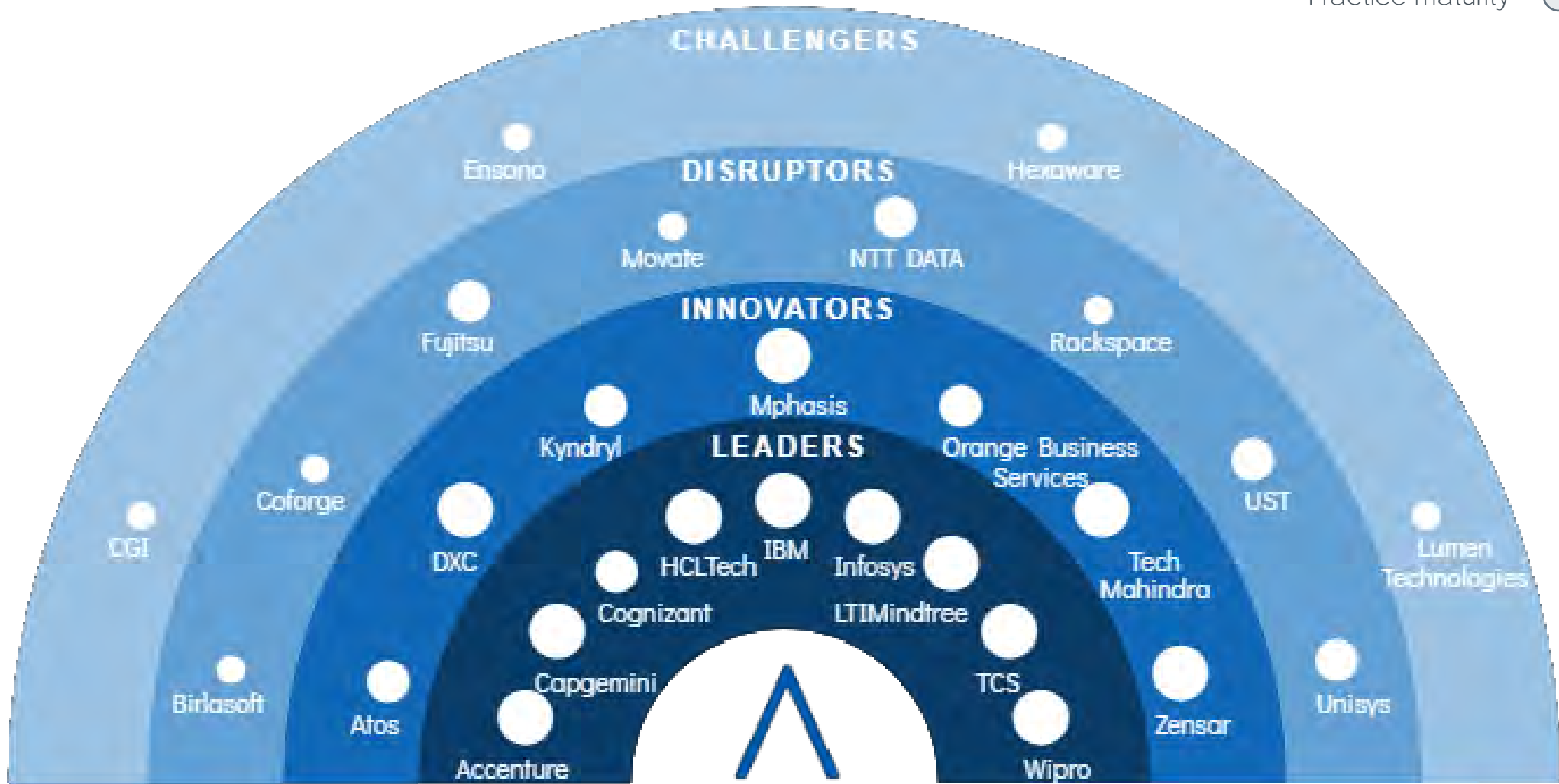
Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity, as well as demonstrate the commitment that results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.



Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale as providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the providers in other categories.



Practice maturity ○ ○ ○





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LTIMindtree profile



# LTIMindtree: RadarView profile



- Practice maturity ★★★★★
- Partner ecosystem ★★★★★
- Investments & innovation ★★★★★

Has launched a dedicated business unit with Google Cloud, AWS, and Microsoft for industry assets and workforce skills. Augments its offerings with a new AI platform, Canvas Joritz.

Practice overview		Client case studies		
<ul style="list-style-type: none"> <li>Practice size: 5,082</li> <li>Active clients: 260+</li> <li>Certified/trained resources: 4,000+ certified professionals</li> <li>Delivery highlights: 35 delivery centers</li> </ul>		<ul style="list-style-type: none"> <li>Consolidated workloads for a fuel company based in Sweden and Denmark that were spread across five data centers and migrated them to a hybrid cloud on VMware and Azure. This helped to reduce OPEX and gain visibility over workloads for managing costs.</li> <li>Helped a US-based public utility company manage 10M customer accounts on AWS. It identified the gaps in the existing cloud strategy and provided documentation to improve it. This helped the client reduce costs by 17% on unused resources.</li> <li>Helped a global pharmaceutical manufacturer manage its critical applications spread across AWS, Azure, and VMware. It consolidated the cost incurred for different sets of applications on this multicloud setup and enabled seamless scaling during peak demands.</li> <li>Helped a multinational travel and meetings program management company migrate from on-premises to AWS and leverage cloud-native tools and services for high-level security and governance. This also led to a 35% reduction in operating costs.</li> </ul>		
\$250M–\$500M Cloud platform revenue, FY 2022	40%–50% Cloud platform YOY growth, FY 2022			
Key IP and assets		Partnerships/alliances	Sample clients	Industry coverage
<ul style="list-style-type: none"> <li>Infinity: An advanced data analytics, knowledge-based automation, and IoT connectivity platform</li> <li>Infinity Applens: An automated migration assessment solution</li> <li>CloudKnit: A UX-driven, analytics-powered, automated, secure, and composable cloud management platform</li> <li>Canvas Joritz: An AI-powered automation platform</li> </ul>		Cloud platform providers  Software providers 	<ul style="list-style-type: none"> <li>A fuel company based in Sweden and Denmark</li> <li>A US-based public utility company</li> <li>A global pharmaceutical manufacturer</li> <li>A multinational travel and meetings program management company</li> <li>A Middle Eastern investment management company</li> <li>A US-based Insurance company</li> </ul>	<ul style="list-style-type: none"> <li>Aerospace &amp; defense</li> <li>Banking</li> <li>Financial services</li> <li>Government</li> <li>Healthcare &amp; life sciences</li> <li>High-tech</li> <li>Insurance</li> <li>Manufacturing</li> <li>Nonprofits</li> <li>Retail &amp; CPG</li> <li>Telecom, media &amp; entertainment</li> <li>Travel &amp; transportation</li> <li>Utilities &amp; resources</li> </ul>

Darker color indicates higher industry coverage through digital services ●●●●●



## Analyst insights

### Practice maturity



- In November 2022, LTI merged with Mindtree and rebranded as LTIMindtree, further enhancing its capabilities in IT-enabled services.
- In 2021, it expanded its rainmaker community of cloud architects and technologists by including cloud advisory for the application and infrastructure to enhance customer engagements. It added a significant number of enterprise architects with combined cloud skills in third-party cloud platforms.
- Its hybrid cloud offerings include enterprise cloud operations that comprise data center management services, a digital hybrid infrastructure platform (a joint offering with IBM used for managing multicloud/hybrid environment), and resource optimization/FinOps through an intelligent workload director. It offers distributed workload build services for building edge computing solutions in public, private, and hybrid cloud solutions, database, and middleware offerings which include both traditional and new edge services, leveraging IBM WebSphere and software-defined networking solutions.
- These offerings are managed by its Full Stack Digital Operations (FSDO) model based on site reliability engineering principles. It enables enterprises to reimagine their IT infrastructure as a business transformation enabler by adopting digital and cloud technologies to manage diverse operations.

### Partner ecosystem



- In August 2022, LTIMindtree expanded its partnership with Microsoft by launching a dedicated Microsoft business unit to develop end-to-end cloud solutions for enterprises. This business unit will train its 12,000 professionals on Microsoft technologies by 2024.
- In May 2022, it launched a dedicated business unit with Google Cloud and launched Canvas Eureka to further strengthen the partnership. Canvas Eureka facilitates faster migration from legacy data warehouses and data lake solutions to Google BigQuery.
- In June 2021, LTIMindtree launched a dedicated cloud unit for AWS to leverage AWS capabilities in SAP workloads, data analytics, and IoT. The unit helped LTIMindtree cloud advisory and service delivery capabilities and developed ready-to-deploy, industry-specific solutions.

### Investments and innovation



- LTIMindtree has been investing in moving up the technology stack by transforming itself to the FSDO service from a traditional infrastructure management service. It is expanding its services portfolio across IoT, field service management through its edge computing offering, and developing offerings around divestiture as a service.
- In 2022, it augmented its offerings with a new AI platform, Canvas Joritz. The platform converges and digitizes different parts of IT operations into a single system with a core AI engine to transform people-centric operations into bot-centric operations, providing benefits including real-time governance, improved productivity, and reduced alert fatigue.

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# Key contacts



**Gaurav Dewan**  
Associate Research Director  
gaurav.dewan@avasant.com



**Jim Rinaldi**  
Senior Fellow  
jim.rinaldi@avasant.com



**Libby Roney**  
Fellow  
Libby.roney@avasant.com



**Swapnil Bhatnagar**  
Senior Research Director  
swapnil.bhatnagar@avasant.com



**Taniya Chandra**  
Senior Analyst  
taniya.chandra@avasant.com



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