Market Analysis: Disruptive Hyperscaler Cloud Service Providers

Excerpt for Hexaware

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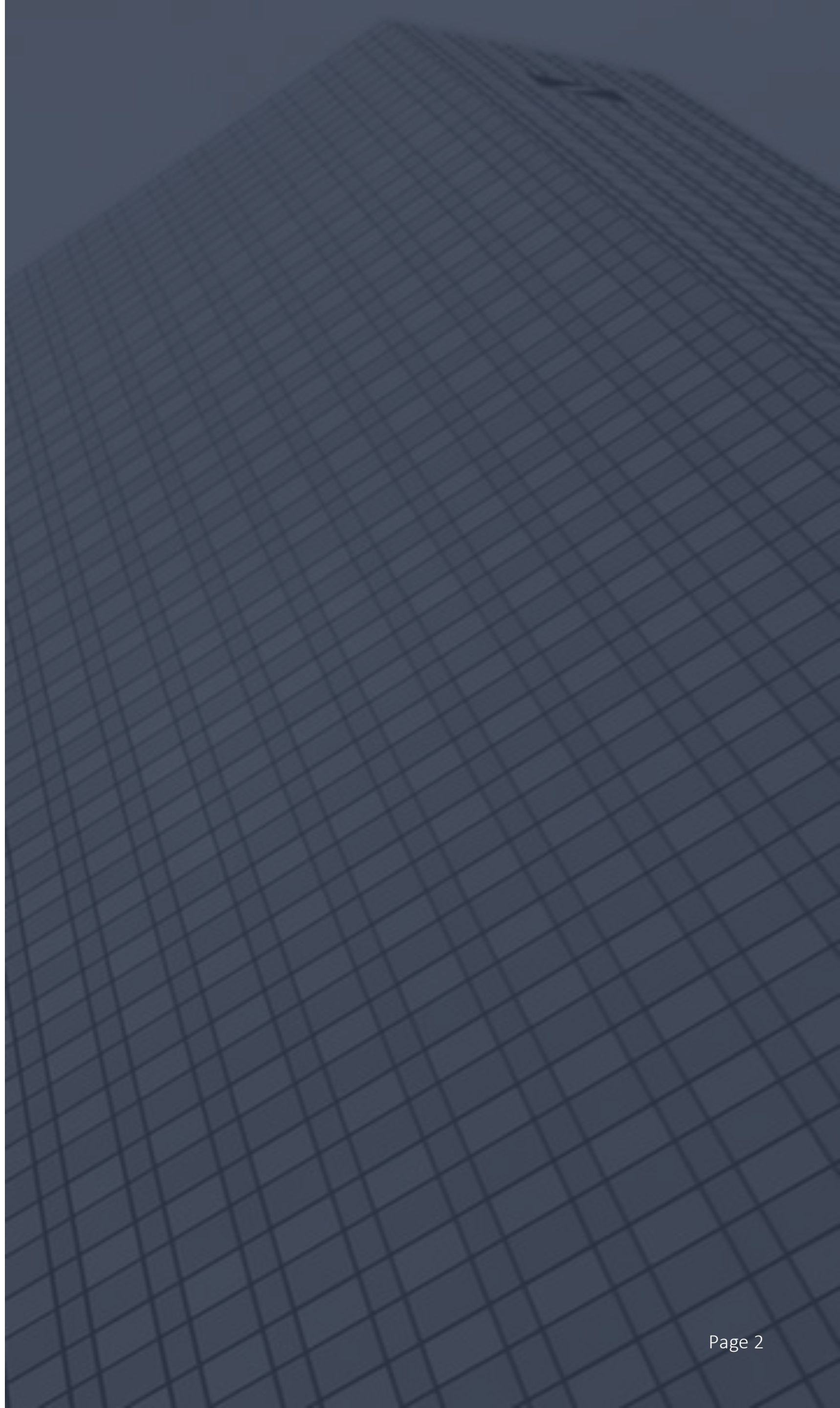
The growth in cloud migration for large scale, highly secure, and resilient service delivery creates apple opportunity for disruption in the cloud service provider marketplace. These vendors can gain share by focusing on customer experience, thought leadership, and strong cloud platform knowledge to deliver best in class customer experiences."

—Joel Martin, VP Cloud Research, HFS



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Introduction

About this report

This Market Assessment report provides insights and profiles emerging, disruptive hyperscaler cloud service providers. Companies covered in this report are global, have strong partnerships with hyperscalers (cloud infrastructure companies like Microsoft Azure, Amazon AWS, IBM Cloud, etc.), and have dedicated teams of up to 5,000 cloud professionals.

Some of these disrupters focus solely on providing hybrid and multi-cloud cloud solutions. In contrast, others are part of significantly larger organizations that bring compelling systems integration, outsourcing, and business process outsourcing solutions to market. HFS sees these companies as likely market disruptors as can pivot quickly, whereas some of the larger players may lack similar agility.

Key differentiators that make these companies potential disrupters.

HFS provides a market overview, key trends in the hyperscaler cloud services market, and profiles of each of these firms. We base our analysis on ongoing research, survey data of business and technology leaders, and interviews with the service providers. In this report, we focus on the talent, tools, thought leadership, and customer experiences these vendors bring to market to validate their ability to implement solutions while disrupting how other systems integrators (Sis) and business process outsources (BPOs) are bringing similar services to market.

How will these companies succeed in the market?

Companies can succeed in the cloud market by following these suggestions:

1. Convert existing customers to their cloud services by leveraging intimate relationships and extending contracts and services to provide business and technology advisory and digital transformation services.
2. Build best-in-class relationships with the hyperscalers that focus on specific regional or industry services and offerings that the service provider and the hyperscaler see as strategic.
3. Focus on building best-in-class cloud-value-stream offerings that accelerate discovery, assess technology debt and migration opportunities, and provide automation tools to focus on core system transformation—freeing up resources to focus on noncompliant solutions and building in management and governance frameworks supporting hybrid and multi-cloud solutions.

Research methodology

This research is the result of data collected in 2020 through provider RFIs, structured briefings, client reference interviews, and publicly available information sources. This information is supplemented by key findings from a large G2000 survey of enterprise leaders. This report looks at service providers with less than 5,000 cloud professionals, certifications with at least two hyperscalers, and industry or regional focus. This report is a companion to the HFS Top 10 Hyperscale Cloud Service Provider report. Data provided in the profiles contained in this report are based on the following three main dimensions:

Voice of the customer

- Candid feedback from client references and insights from over 600 G2000 responses to the IT services satisfaction survey.

Ability to execute

- Partnerships
- Talent and development
- Scale, breadth, and reach
- Commercial models and pricing

Innovation capability

- Marketing and thought leadership
- IP and accelerators
- Investment roadmap
- Consulting and professional services

This data was further used to provide the profiles in this report and provide a subjective ranking based on execution, innovation, and voice of the customer. These are explained in more detail in the following slide.

Ranking methodology

HFS assessed each vendor on multiple criteria to provide insights into the capabilities to deliver services to the market. Based on interviews with the company, ongoing research and surveys, and client data, HFS has provided a rating of each vendor in its profile based on our analysis. This ranking is based on a simplified scoring of each dimension: **A = market leading, B = strong capabilities, C = developing capabilities, D = lacking capabilities**. Unlike HFS Top 10 reports, we have refrained from an outright ranking of each of these vendors as the size, growth, and strategic investments of these vendors is driving rapid change and expansion of services to their clients and the market.

Capability	Grade	
Ability to execute	**X**	Ability to execute is based on partnerships the hyperscale cloud service providers have with the cloud vendors, practice methodologies, tools for assessing, migrating, and the ability to provide ongoing management of hybrid and multi-cloud offerings. Also considered are deep industry expertise, regional coverage, and competitive pricing of services.
Innovation	**X**	Innovation ranking is based on how the service providers are packaging and delivering their intellectual property, investing in growth to provide orchestrated hybrid and multi-cloud services, and depth of talent with their bench of dedicated cloud professionals, certifications, and thought leadership.
Voice of the customer	**X**	Voice of the customer is based on customer references conducted by HFS, reviewing case studies citing features and business benefits, from ongoing research and inputs from HFS surveys of end-user clients in 2020.

HFS's cloud services value stream heat map

As organizations move toward a cloud-native business model for their technology and business, they must consider how to effectively migrate their technology assets, data, and workloads into private and public networks. Service providers can play a large role in this migration and offer talent, methodologies, and solutions to assist and sustain these efforts. The following table outlines the HFS framework for the services that should be used to enable this migration.

Governance	Discovery	Assessment	Migration	Management
Cloud governance is an organizational framework consisting of establishing, enforcing, and overseeing the activities and guidelines needed to establish policies for cloud use. This should complement existing business and technology governance and policies.	*Discovery and planning* focus on the iterative efforts needed to identify applications, workload, connectors, data sources, and compatibility for migration toward a cloud-centric deployment.	*Assessment* identifies and focuses teams on systems' compliance with the new architecture required to deploy, support, and manage in the context of cloud-native requirements and the organization's governance policies. Assessment will often lead to prioritizing efforts to adapt, re-code, or replace with cloud-compliant solutions.	*Migration* is the step where moving digital assets to cloud platforms takes place. Automated and physical efforts, tools, and talent are applied to transition to a cloud architecture that can be hosted in private, hosted, or public cloud platforms.	*Cloud management* brings tools, services, and talent to bear to sustain the efficiencies, scale, and compute power offered by adopting cloud-native process and operating models. Organizations and partners will provide tools to monitor, develop, improve, deliver, and continuously innovate.

Sources of data

This report relied on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the hyperscaler services providers covered in our study.

Sources are as follows:

RFIs and briefings

- **RFIs**—Each participating vendor completed a detailed RFI.
- **Vendor briefings—**HFS conducted briefings with executives from each vendor.

Reference checks

- We conducted reference checks with **active clients** of the study participants via detailed phone-based interviews.

Web and survey research

- HFS conducted in-depth research based on web research, past research notes and interviews, and data collected from a series of studies conducted throughout 2020.

Other data sources

- Public information such as press releases and regulatory filings.
- Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

Research definitions

- **Hyperscaler**: A provider of computing architecture to scale appropriately as increased demand is added to the system. This typically involves the ability to seamlessly provision and add compute, memory, networking, and storage resources to a given node or set of nodes that make up a larger computing, distributed computing, or grid computing environment. Examples of providers of these services are Amazon AWS, Microsoft Azure, Google GCP, Alibaba Alicloud, IBM, and Oracle.
- **Hyperscale cloud service provider**: Entities that consult, design, develop, build, manage, and orchestrate software, data, and applications provided by one or multiple hyperscalers.
- **Hybrid cloud**: A computing environment that combines an on-premises data center (also called a private cloud) with a public cloud, allowing data and applications to be shared between them.
- **Multi cloud:** A cloud computing approach where multiple public clouds (from more than one cloud vendor, e.g., hyperscaler) are leveraged to support single or multiple applications.
- **Cloud services value chain:** HFS framework that outlines a services provider's capabilities to support organizations in the assessment, discovery, migration, management, and governance of applications, data, and computing resources toward a goal of providing cloud-native solutions and architecture.
- **Cloud native**: Cloud-native computing is an approach in software development that utilizes cloud computing to "build and run scalable applications in modern, dynamic environments such as public, private, and hybrid clouds."

Hyperscaler cloud service providers covered in this report


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Executive report summary

Hyperscaler market overview

What are hyperscaler cloud service providers, and why do they matter?

Hyperscaler cloud service providers bring global business solutions, outsourcing, and consulting capabilities to support and enable organizations to migrate, adopt, and build cloud-native offerings. These providers leverage their cloud professionals' experience and talent to consult on platform re-architecture, application development, data migration, and transitioning services from technology stacks into macro and microservices hosted in a data center on-premise, private cloud, public cloud (hyperscale), or any combination.

Why is it important for companies to consider hyperscale cloud service providers now?

With an infinite increase of data, applications, connections, and workloads taxing an organization's ability to adapt and develop to new platforms, DevOps, testing, security, and governance requirements are hamstringing innovation, processes, and go-to-market efforts. As a result, organizations are working with partners to transition storage, computing, back-up, and hosting services to cloud-based platforms to leverage the scale and compute power they can provide.

Hyperscale cloud service providers can help organizations in their adoption of cloud-native programs by:

- **Supporting a mass migration to the cloud:** The pandemic prompted enterprises to adopt public cloud services en masse, and we expect cloud services to be a priority for organizations—regardless of size—over the next decade as organizations desire to deliver end-to-end solutions using a combination of on-premise, hybrid, or public cloud platforms. Hyperscale cloud service providers bring experience with platform re-architecture using the latest Kubernetes, containers, and automated systems migration. They leverage partnerships with hyperscalers to choose the best fit for a purpose based on workload specifications, and they can offer industry-specific consulting on best practices to address internal and external governance, risk, and compliance requirements.
- **Providing cloud migration value streams:** Organizations have moved from developing in the cloud and subscribing to SaaS (software as a service) solutions to migrating their monolithic application stacks to hybrid and public clouds. This migration has revealed the vast amount of technology debt many have accumulated; thus, organizations are prioritizing services providers that demonstrate the capabilities to hasten the discovery, assessment, migration, automation, management, and governance of applications and processes and effectively move them to a hybrid or fully cloud-based platform.
- **Addressing the war for talent:** Cloud-native strategies have led to a talent war for hyperscaler services. New architecture, applications, and tools for leading cloud providers like Azure, AWS, and Google Cloud mean that service providers can augment their customers' skills. The flurry of acquisitions that began in late 2020 has continued into 2021, and we expect it to continue as customer demand for service providers' support will likely outstrip supply by mid-2021.

Summary points

The cloud market evolves with the major hyperscale incumbents

The hyperscale cloud services market is, to a significant extent, governed by the roadmaps and growth strategies of the largest cloud firms. Most notably, the big three cloud platform providers—Amazon's AWS, Microsoft's Azure, and Google's Cloud Platform (GCP)—continue to battle with each other to win market share.

Disrupting global cloud service providers

These vendors build compelling narratives around talent, process, and migration capabilities and leverage partnerships with the hyperscalers to aggressively pursue differentiation at industry and regional levels. Customers report positive engagement experiences, faster time to convert to cloud, and cost advantages of working with many of these firms. While they may lack the depth or reach of larger firms, in isolation, the ability to be agile and innovative allows these firms to continue to win share in the growing cloud-native market.

Communicate value stream not a product narrative

Many of the companies we reviewed still offer discrete, tailor-made product packages to discover, assess, migrate, automate, and manage. Enterprises are looking for a clear methodology from their partners on doing all this as one service for both core and contextual applications. Hexaware's Amaze and Zensar's Connected Autonomous Cloud are examples of these services.

Talent is key

Attracting and keeping talent is a challenge shared with larger firms; these firms will need to continue to ramp up both recruiting and certification programs for their cloud professionals to grow their business. With smaller groups of cloud professionals, we expect these smaller teams and organizations to aggressively leverage partners with others, including the hyperscalers, to augment talent.

Cloud is about the architect not the developer

Orchestration of multiple applications, databases, and processes across on-premise, hybrid, and public cloud is an architectural issue first. DevOps, testing and QA, and CI/CD managers are all important, but enterprises and service providers must start with the architecture in place and the vision for change. Failing to do so will create more technical debt, not reduce it. The goal of Cloud Native must be to create technology wealth, and this begins with how you architect your systems to deliver value to the business.

Summary: Disruptive hyperscaler cloud service providers

	Ability to Execute	Innovation	Voice of Customer	HFS point of view
Coforge	B	B	B	Strong customer experience and industry capabilities
FUJITSU	A	C	C	Building on global systems integration expertise to provide a path to digital transformation
HEXAWARE	A	A	A	Bringing compelling mix of methodologies and solutions to accelerate cloud migration efforts
LTI	B	B	B	A provider with clear vision, accelerators, and industry talent
Mphasis The Next Applied	A	B	A	Agile cloud services partner with strong customer advocacy
NTT Data	B	B	A	Capable provider bringing domain expertise to specific verticals
Persistent	C	B	A	Collaborative provider with clear capability in life sciences and healthcare
Tech Mahindra	A	C	A	Global leader in technology transformation efforts adding cloud expertise
UNISYS	B	C	A	Promoting security and compliance as table stakes for cloud innovation
virtusa	B	A	B	Nimble AWS-focused provider to financial services
Zensar	B	A	B	Aggressively building an innovative portfolio of cloud value stream tools

A = market leading, B = strong capabilities, C = developing capabilities, D = lacking capabilities

As the Market Analysis report is outside of the Top 10 methodology, HFS scored based on in-depth interviews with service providers, customers, and existing market research and surveys conducted by HFS in 2020. Companies profiled are building their talent and capabilities and, in many cases, re-orienting their business to capitalize on the need for trusted partnership that bring alliances with software vendors, value stream methodologies, and strong customer advocacy.

Notable performances of disruptive hyperscaler cloud service providers

HFS Podium Winners Top three providers overall across execution, innovation, and voice of the customer criteria		
HEXAWARE	Mphasis The Next Applied	Tech Mahindra
Execution powerhouses Top three providers on execution criteria	**Innovation champions** Top three providers on innovation criteria	**Outstanding voice of the customer** Top three providers on voice of the customer criteria
Tech Mahindra, HEXAWARE, Mphasis The Next Applied	HEXAWARE, virtusa, ZenSar	Mphasis The Next Applied, HEXAWARE, Persistent

Other notable performances

- NTT Data a focus on growing talent and automation to excel at migration and management services
- Unisys investing in public sector transformation with strong alliance partnerships
- Coforge well regarded by customers for exceptional ability to team and share the work planning, goals, and outcomes.

Note: Notable services providers that did not participate in this report include Deloitte and PwC

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Summary of providers and market opportunities

Hyperscale cloud service providers: A summary of providers assessed in this report

Service providers (alphabetic order)	HFS point of view
Coforge	Strong customer experience and industry capabilities
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Hexaware	Bringing compelling mix of methodologies and solutions to accelerate cloud migration efforts
LTI	A provider with clear vision, accelerators, and industry talent
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Market dynamics: What do buyers want from disruptive cloud service providers?

Bring flexibility and transparency

We had strong feedback from clients that they have consistently noted the tremendous flexibility and professionalism these cloud service providers bring to their engagements. Customers often mentioned they prefer working with these providers compared to the structure-heavy tier one providers because of their positive experiences with collaboration. In terms of flexibility, enterprises are looking for partners willing to bring resources to engagements to tackle any challenge. Additionally, transparency in commercial models and the whole engagement is necessary. Providers must continue to focus on these.

Strong negotiating ability with hyperscalers

Enterprise buyers are scrutinizing the relationships providers have with hyperscale providers—in most cases, to ensure they can lean on them to get the best deals and pricing from engagements. In addition, CIOs and IT leaders are looking for providers collaborating closely with the cloud giants to ensure they build roadmaps that won’t suddenly fall out of date when the cloud giants build out capability or plug in fresh solutions. But this might not be possible with the emerging players. Enterprises are looking for the best cost-optimization solutions and approaches to keep costs in control.

Access to talent

A major motivation is ensuring that cloud service providers have the talent necessary to build out comprehensive and coherent cloud and infrastructure roadmaps. In an increasingly hostile talent war, these organizations may find themselves challenged to recruit, train, and retain talent from aggressive competitors. These providers will need to develop a cloud-native culture to attract the talent needed to grow.

Being an innovative provider

Besides flexibility and transparency, buyers are looking for speed-to-market tools and accelerators during their cloud journey. They also prefer to leverage providers’ industry expertise and cloud experiences. These providers must have or develop capabilities that have clear business value to the industries or regional needs or requirements. These smaller players can also be more agile when working with hyperscalers, trying new solutions and building strong relationships and skills they can pass on to their customers.

Help with architecture

Most organizations will struggle with converting an on-premise or hybrid technology architecture into a cloud-native one. This is an important journey; these providers can help their customers by focusing on bringing cloud-first applications, integrations, databases, and workflows helping many customers skip digital transformation and reveal where an organization can uncover technology wealth through collaboration, analytics, and better decision making. This will be enabled by building architecture focused on strong business and technology relationships.

4 Disruptive hyperscaler cloud service provider profile

Bringing compelling mix of methodologies and solutions to accelerate cloud migration efforts

HEXAWARE

Capability	Grade
Ability to execute	A
Innovation	A
Voice of the customer	A

Strengths

- **Microsoft partnership:** Hexaware has a strong partnership with Microsoft Azure, collaborating on a range of solutions and talent development initiatives. Hexaware has a strong history of co-selling engagements with Microsoft and collaborating on new market initiatives. Hexaware's heritage with Microsoft has enabled the firm to build a strong bench of talent and successful client engagements.
- **AWS partnership:** Hexaware's acquisition of Mobiquity in 2019 brought in considerable AWS cloud capabilities, including a solid bench of AWS-trained professionals and a portfolio of successful client engagements. This enables the firm to diversify its hyperscale cloud services capabilities.
- **Innovation track record:** Hexaware has a track record of deploying innovative solutions, including working with the hyperscalers to develop its own intellectual property. The firm's Amaze portfolio offers clients access to a large toolbox of accelerators to support engagements.
- **Talent pool:** Hexaware has been able to build a sizeable talent pool with ample Microsoft and AWS capabilities, which are now supplemented by investment in Google Cloud expertise, enabling the firm to attract more business.

Opportunities

- **Promote multi-cloud capabilities:** Hexaware has partnerships with all the major hyperscalers. As cloud buying trends evolve, Hexaware must continue to invest across the board to provide a cloud-agnostic approach and help customers choose a hyperscale partner (or partners) that best suits their business and technology needs.
- **Build on the voice of the customer**: Hexaware scored well with its customers in our conversations. It should capitalize on its good relationships to build more advocacy in the market for its services.
- **Bolster talent:** To compete, Hexaware will need to continue to invest in talent acquisition to address an increase in clients' cloud projects.
- **Security and governance:** With a strong focus on the development and migration of software and services, Hexaware should develop and promote governance and security programs to promote sustainable projects for its clients.
- **Boost cloud architecture practice**: Hexaware has proven lift-and-sift and tools to decouple monolithic applications into macro services. However, it needs to promote cloud architecture expertise to design out technology debt, not just ease it.

Acquisitions and partnerships

Key partnerships:

- **Hyperscale partners:** AWS, Azure, Google Cloud
- **Global strategic partners**: CloudCheckr, Densify, CloudBolt (CMP Solution), VMWare

Acquisitions:

- 2019: Mobiquity

Solution portfolio

- **Amaze for Application Modernization:** Amaze for Applications is Hexaware's product suite developed to accelerate cloud adoption. It helps clients re-platform Java and .NET applications to give a 50% TCO reduction and 25% productivity gain at a cost and timeline that is comparable to cloud re-host.
- **Amaze for Infrastructure:** Amaze for Infrastructure is Hexaware's automated, self-service approach to undertake migrations that are largely lift-and-shift-oriented. The platform enables a high degree of automation with capabilities to execute migration at scale.
- **Amaze for Mainframe:** Amaze For Mainframe is a mainframe automation-first assessment and modernization platform to modernize the mainframe workloads from on-premise to cloud. It can reduce the TCO and enable faster recovery of ROI.
- **Amaze for Data:** Amaze for Data and AI accelerates the transformation of on-premise DW&A ecosystems to cloud through automation. Amaze can effectively manage both DW modernizations and greenfield implementations. Hexaware built a Data Ingestion Framework (DIF) as part of Amaze.
- **Amaze for Manage:** Hexaware's Amaze for Manage platform for performance optimization focuses on four core areas: core operations (traditional infrastructure services), service operations (automation enabled self-service), security and financial management, and multi-cloud lifecycle operations.

Operations and key clients

Cloud professionals: 2,500+

Certified associates:

- 1,000 AWS
- 1,375 Azure
- 125 GCP
- Others: 800+ (Salesforce, Workday, Pega, MuleSoft, etc., certifications)

Delivery center locations:

- India and others in APAC
- Europe (the Netherlands, Poland, Germany, Belgium)
- The US
- LATAM
- The UK

Key clients include:

Wawa, Illa Bank, Amica, Inland, Enva, Nestle, Intercontinental Hotel Groups, Voma

A = market leading, B = strong capabilities, C = developing capabilities, D = lacking capabilities

5 Market insights

Market trends: Customers look to service providers to help select and manage services with multiple hyperscalers

AWS presents a compelling proposition to more industries

AWS continues its role as the leader of hyperscale cloud services. From S3 to Lambda, Amazon continues to lead with infinite scaling and computing offerings. AWS Lambda pushes the current edge for organizations interested in where functional application services and serverless computing will drive innovation and value. With their new CEO coming from AWS, Amazon will continue to become a global behemoth for cloud solutions, data, application hosting, and development.

Azure's efforts to play nice with others are winning loyalty

Azure, Microsoft's cloud offering, has held a somewhat privileged position among enterprises and providers alike. Foremost, many businesses are, in effect, largely composed of existing Microsoft technology, which makes migrating an easy choice for executives. Providers, similarly, have large benches of Microsoft and Azure certified talent, which makes delivery provision a more palatable business. Microsoft's leadership is aware of this, and, fuelled by a refreshed commitment to building ecosystem-led business models, it makes the firm likely to continue its role as a trusted fabric of the modern enterprise.

Google pursues a more aggressive strategy

Over the past year, Google has begun to pursue an aggressive business development strategy focusing on winning enterprise spending from its two larger rivals. The firm is well-positioned to ride a new wave of enterprise spending on AI and analytics technologies—all of which will need a cloud foundation to sit on. Services providers will need to communicate the value of joining GCP's ecosystem of applications, services, and development tools to convince more customers to move core applications to its platform.

Alibaba develops a foothold in APAC

While the big three cloud giants have developed a strong global footprint, they're finding themselves coming into conflict with Alibaba's cloud proposition, which holds an increasingly dominant position in the APAC region. The firm has launched an ambitious growth strategy, moving out of China, where it has a dominant cloud business, by acquiring and building out data centers and delivery capabilities in rapidly growing economies such as Indonesia.

IBM's new leadership looks to cloud as the firm's growth engine

IBM has always had a conflicted position in the hyperscale market. The firm is, technically, one of the largest hyperscale firms in the market, but much of the firm's business stems from high-value IT services, a fact that presents the firm as somewhat of a quandary when it comes to conflicting business interests with firms that would naturally ally to hyperscale firms. IBM's new leadership has renewed focus on cloud capabilities, and the acquisition of Red Hat and its ubiquitous OpenShift technology means IBM is now a firm providers have to partner with, rather than one they might.

Market trends: Avoiding multi-cloud technology debt

Enterprises seek to answer the multi-cloud question

Buyers are focused on building out multi-cloud infrastructure to offer the best return on investment. In some instances, this approach is a direct result of regulatory compliance, where enterprises are required to maintain a level of resiliency that hosting with a single provider won't accommodate, or a fear of lock-in or a quest for best-in-breed capabilities spread across hyperscale services. This is very much evident by our data suggesting that around 65% of enterprises favor of multi-cloud adoption.

Building agility into the next platform

Hybrid-cloud solutions promise greater operational flexibility, agility, and cost efficiencies. An ideal IT operating model will be based on working with a services provider with an understanding of data orchestration across systems and regardless of platform, using Kubernetes, microservices, and edge computing tools. The concern is how the next generation of technology debt may be created as applications, data, and workflows will reside on separate platforms. This is a real concern, as companies like SAP, ServiceNow, Salesforce, and Oracle are also pushing customers to use their clouds to deliver services.

Service orchestration is critical

Ever since hybrid and multi-cloud strategies started growing, optimizing and orchestrating existing cloud-use remained one of the key challenges. Some enterprises could have used their cloud budget in more optimal ways. Customers seek service providers with the expertise to optimize their subscriptions and cloud usage, as well as deliver solutions.

Market trends: Disrupting factors used by these service providers

Automation

Cloud migration remains a tedious and resource-consuming task. A clear way for these providers to add value is to demonstrate their ability to apply tools to speed assessment, discovery, and conversion of existing applications to cloud-based macro services. This releases talent with the customer and partner to prioritize work on non-compliant systems or code and expedite value realization.

Security remains the major concern

Security is a major concern for enterprises in the application migration and public cloud environment. A strong industry capability combined with strong relationships with hyperscalers allows these service providers to promote best-in-class security tools, responses, and remediation efforts.

Building strategic partners

Growing a successful cloud practice is critical to these services providers, and they are investing heavily in certifications with both leading and regional hyperscalers. Continuing to narrow their focus to maximize a hyperscaler's full portfolio of solutions allows them to develop deep collaborative relationships with the hyperscaler's teams. Customers leveraging this can apply innovations from both companies to create a disruptive advantage in the markets they serve.

Additional Research: Top 10 Hyperscale Cloud Service Providers

- Global Business Solutions and Systems integrators have been supporting digital transformation efforts of customers and are providing supporting in adopting the scale and reach of public cloud Hyperscalers to transition applications and workloads on a Cloud Native journey.
- These vendors have resources including over 10,000 dedicated cloud professionals, certifications with multiple private and public cloud providers, and offer multi-region and industry tailored solutions.
- In a complimentary report, Top 10 Hyperscale Cloud Service Providers, HFS profiles 12 additional vendors, their solutions, and where their solutions provide deep innovation combined with large scale execution capabilities.

Vendors covered:

accenture, Atos, Capgemini, Cognizant, DXC.technology, EY, HCL, IBM, Infosys, KPMG, TATA CONSULTANCY SERVICES, wipro

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Joel has worked in industry, as a business leader, and as an analyst/consultant for nearly three decades. Leading teams and products that adopted cloud-based delivery solutions for global customers and product managing business applications, semiconductor design data, and research services for both high tech and industry investors.

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Martin Gabriel is an Associate Director, Research at HFS, covering IT services, tracking global outsourcing deals in IT/BPO services and taking part in various research writings.

Martin has over five years of research, analytics, and market intelligence experience in TCS and Xchanging. In his TCS role, he worked on point-of-sale and consumer panel data and on analytical projects, providing business insights to clients. He was responsible for analyzing retailers and consumer behavior for various FMCG/CPG products to address diverse business issues and provide actionable recommendations for the future growth for clients. He performed extensive category reviews, brand management and trend analysis based on point of sale and homes scan data along with information from secondary sources. At Xchanging, he was part of the market intelligence team that supports Xchanging's vertical heads, strategy team, and sales and marketing team.

About HFS Research

The HFS mission is to provide visionary insight into major innovations impacting business operations, including automation, artificial intelligence, blockchain, Internet of things, digital business models, and smart analytics.
HFS defines and visualizes the future of business operations across key industries with our Digital OneOffice™ Framework.

HFS influences the strategies of enterprise customers to help them develop OneOffice backbones to be competitive and to partner with capable services providers, technology suppliers, and third-party advisors.

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