



HORIZONS REPORT

Next-gen IT Infrastructure Services, 2026

An assessment of service providers, addressing the why, what, how, and so what

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Excerpt for Hitachi Digital Services

“

Infrastructure services are no longer just the foundation for enterprise AI. They are becoming the control plane that governs where intelligence runs, how it is optimized, and whether it can be trusted at scale.

”



Ashwin Venkatesan

Executive Research Leader,
HFS Research

“

Next-gen infrastructure services are shifting from scale-led delivery to AI-enabled, platform-driven operations. Providers that translate AI pull-through into resilient, outcome-led execution will define the next leadership tier.

”



Mayank Madhur

Practice Leader,
HFS Research

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Introduction and research methodology

Introduction

- As enterprises accelerate digital transformation, infrastructure is no longer viewed as a static foundation but as a dynamic, intelligent control layer for business resilience, cost governance, security, and innovation. Organizations of all sizes are increasingly prioritizing infrastructure models that can support AI-native workloads, hybrid and multi-cloud environments, edge computing, real-time processing, and growing regulatory and sustainability requirements. To achieve these outcomes, enterprises frequently turn to service providers to help them plan, modernize, operate, and continuously optimize their infrastructure estates.
- HFS Horizons is HFS Research's vendor evaluation framework designed to assess the innovation maturity and value potential of service provider capabilities across three distinct Horizons:
 - **Horizon 1:** Ability to modernize and manage enterprise clients' existing infrastructure estates with secure, efficient, and reliable operations
 - **Horizon 2:** Horizon 1 + ability to drive the "OneOffice" mindset to design and run hybrid, adaptive, and distributed infrastructure that supports AI, multi-cloud, edge, and modern workloads, with built-in sustainability, observability, and cost-efficiency
 - **Horizon 3:** Horizon 2 + ability to drive a "OneEcosystem" approach by delivering intelligent, decentralized, and policy-aware infrastructure foundations by integrating platform engineering, sovereign control, carbon-optimized operations, and embedded automation, at enterprise scale
- This research assesses how well service providers are helping enterprises reimagine infrastructure to meet the demands of AI-native operations, real-time and on-device compute, hybrid and distributed architectures, and the increasing regulatory complexity.
- The study evaluates providers across HFS' next-gen IT infrastructure services value chain, using a broad set of dimensions to understand the **why, what, how, and so what** of their service offerings. It highlights each provider's value-based positioning across the three Horizons and includes detailed profiles outlining service providers' facts, strategic strengths, and development opportunities.

Sources of data

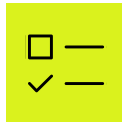
This Horizons research report relies on myriad data sources to support our methodology and provide a well-rounded perspective on the service capabilities of participating organizations covered here. The sources are as follows:



Briefings and information gathering

HFS conducted detailed briefings with next-gen IT infrastructure leadership from each vendor.

Each participant submitted a specific set of supporting information aligned with the assessment methodology.



Reference checks

We conducted reference checks with active clients and partners of the study participants via surveys and interviews.



HFS Pulse

Each year, HFS fields multiple demand-side surveys that include detailed vendor rating questions.

For this study, we leveraged our fresh-from-the-field HFS Pulse study data featuring ~600 enterprises.



Other data sources

Public information such as news releases and websites.

Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

Horizons assessment methodology for next-gen IT infrastructure service providers

The “HFS Horizons: Next-gen IT Infrastructure Services, 2026” report evaluates service providers’ capabilities across a range of dimensions to understand the **why, what, how, and so what** of their service offerings.

Assessment dimension (weighting in %)				
Distinguishing service provider characteristics	Value proposition: The Why? (25%)	Execution and innovation capabilities: The what? (25%)	Go-to-market strategy: The how? (25%)	Market impact: The so what? (25%)
	• Strategy and roadmap • Clarity of vision for IT infrastructure and nature of outcomes • Differentiators: Why clients work with you	• Demonstrate the breadth and depth of services across the IT infrastructure value chain • Integration of transformation and process consulting • Approach to and strength of the partner ecosystem	• Transformation outcomes being pitched to clients • Nature of IT infrastructure investments (M&A, training, R&D) • Co-innovation and collaboration approaches with customers and partners, including creative commercial models	• Scale and growth of IT infrastructure business (revenue, clients, and headcount) • Proven outcomes showcasing transformation enabled through IT infrastructure • Voice of the customer
	Horizon 3 • Horizon 2+ • Ability to drive ecosystem synergy via collaboration across multiple organizations with common objectives around driving completely new sources of value	• Horizon 2+ • Strategy and execution capabilities at scale • Well-rounded capabilities across all value creation levers: talent, domain, technology, data, and change • Comprehensive industry-specific partnerships with strong product experience (PX) • Strong industry-specific IP and joint ventures	• Horizon 2+ • Ability to drive co-creation with clients and the ecosystem partner • Effectively envision outcomes and provide business assurance for transformation	• Horizon 2+ • Referenceable and satisfied clients driving new business models based on the partnership
	Horizon 2 • Horizon 1+ • Ability to drive real business outcomes and stakeholder experiences	• Horizon 1+ • Ability to support clients in their transformational journey • Global capabilities with strong consulting skills and partnerships with all major hyperscalers • Range of industry-specific partnerships and strong PX • Strong industry-specific IP	• Horizon 1+ • Proven and leading-edge proprietary assets, including different platforms • A clear articulation operating model • Capability to deliver transformation	• Horizon 1+ • Referenceable and satisfied clients for the ability to drive business transformation
	Horizon 1 • Ability to drive functional optimization outcomes with selective Industry capabilities	• Strong implementation capabilities • Deep engineering capabilities driving speed and efficiency • Offshore-focused with strong technical skills • Focused partnerships and strong PX • Some industry-specific IP	• Robust fundamentals of technology transformation • Technology and capability focus	• Referenceable and satisfied clients for the ability to execute technology transformation

The next-gen IT infrastructure services value chain visualizes all steps starting from strategy to build, run, and optimize



HFS's next-gen infrastructure services value chain defined

The next-gen infrastructure value chain represents how IT service providers help enterprise clients shift from static and siloed infrastructure to highly dynamic, intelligent, and AI-native digital foundations.



Assessment and readiness

Services help clients evaluate and prepare for modernization by assessing their strategic, regulatory, developer, and sustainability readiness. Providers help shape target infrastructure architectures, whether centralized, distributed, or composable.



Design and deployment

Includes the build-out of tailored, ai-optimized, and secure infrastructure. Providers enable cloud-native, sovereign, and decentralized compute environments with built-in resilience, developer experience design, and policy compliance.



Maintenance and support

Emphasizes automation, telemetry, and continuous cost-performance optimization. Providers embed zeroops, autonomous remediation, and unified observability to manage complexity at scale.



Continuous improvement and innovation

Ensure that clients continuously evolve through platform engineering, reusable IP, ecosystem collaboration, and proactive experimentation with emerging infrastructure paradigms.

The study seeks to address multiple questions

AI-optimized infrastructure

How are you helping clients scale AI-native and decentralized infrastructure? What capabilities do you bring to support GPU/TPU-based clusters, on-device inferencing, edge-to-core orchestration, and data infrastructure tailored for AI/ML performance and latency goals?

Sovereign-by-design

How do you embed trust, sovereignty, and regulatory assurance in infrastructure design and delivery? What frameworks do you use to support sovereign-by-design architectures, confidential computing, and compliance-as-code for dynamic policy enforcement?

Platform-enabled operations

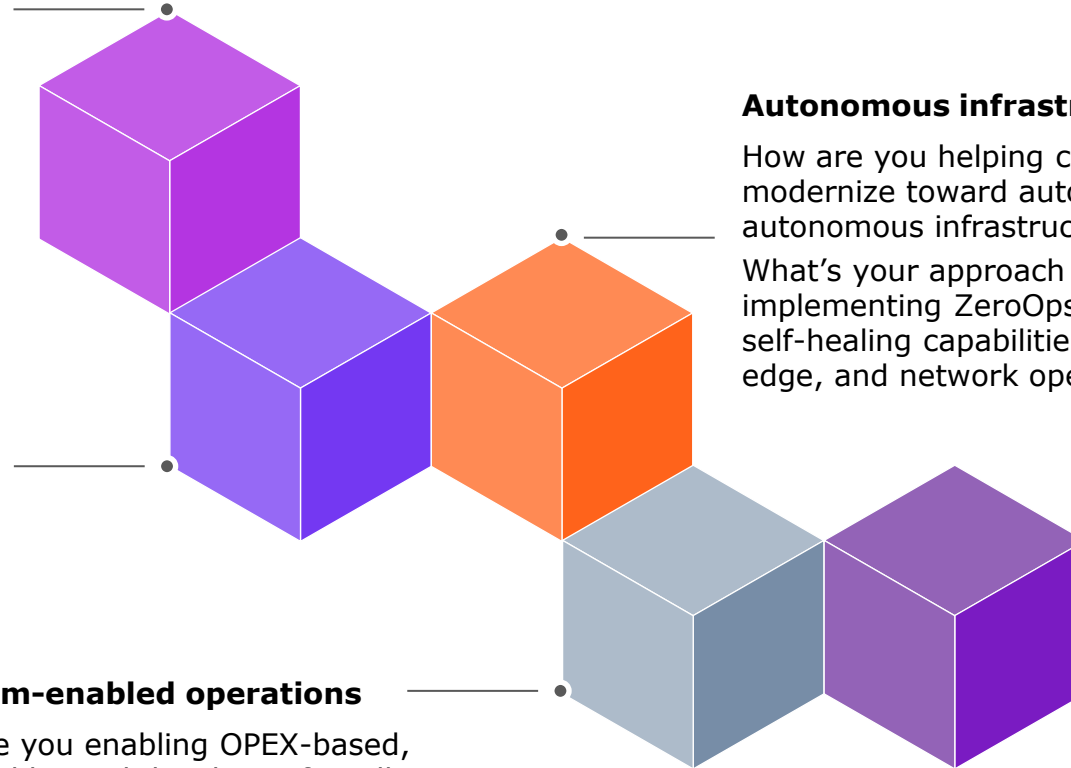
How are you enabling OPEX-based, sustainable, and developer-friendly infrastructure models? How do you help clients adopt IaC, deliver internal developer platforms, optimize cost and energy use, and measure carbon impact?

Autonomous infrastructure

How are you helping clients modernize toward automation-first, autonomous infrastructure? What's your approach to implementing ZeroOps, AIOps, and self-healing capabilities across cloud, edge, and network operations?

Composable and next-gen infrastructure

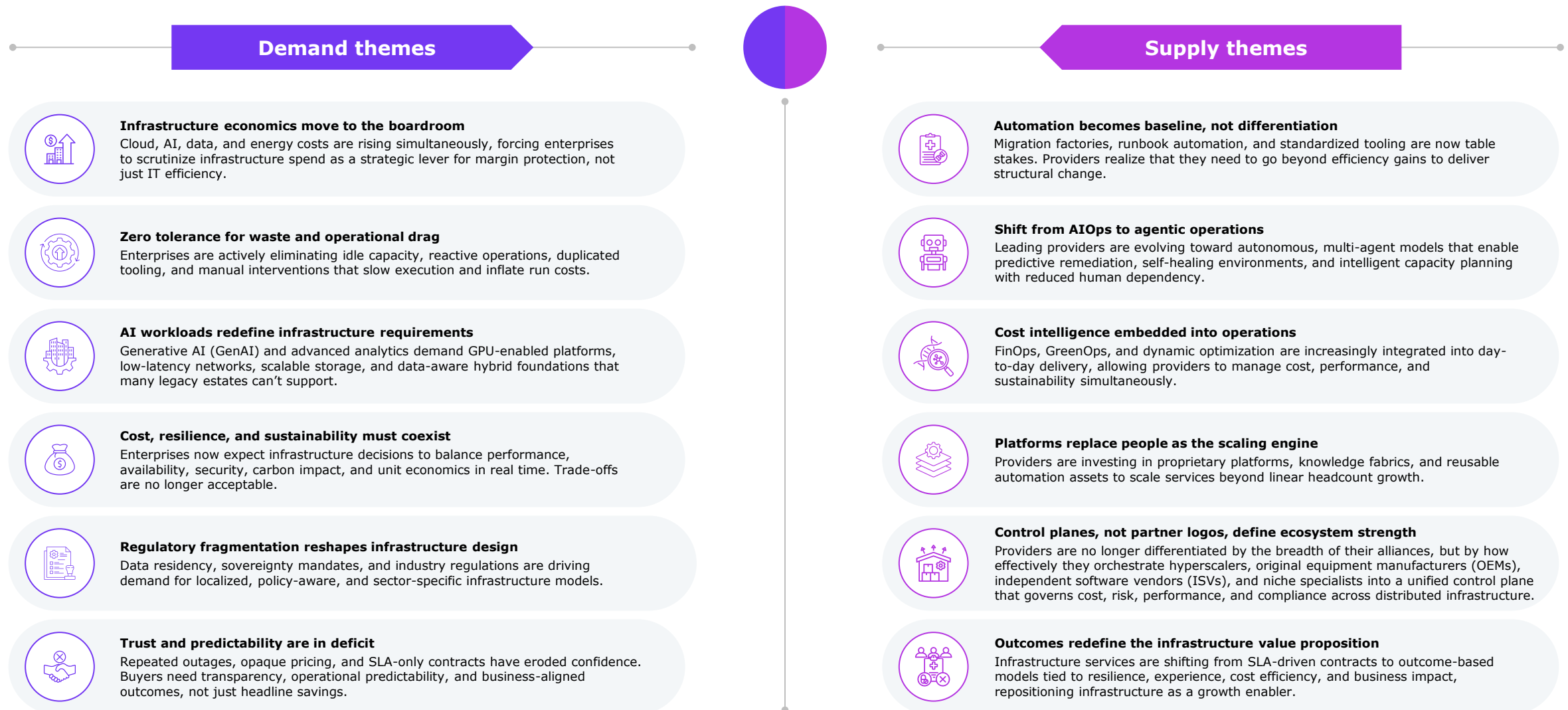
How are you partnering with clients to co-innovate and future-proof infrastructure foundations? What IP, labs, and alliances do you bring to help clients test and adopt next-gen paradigms such as composable infrastructure, neuromorphic chips, and platform-based delivery?



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Market dynamics

As cloud and AI mature, enterprises are rethinking infrastructure as an economic, operational, and risk-control layer and not just a technology stack



Top challenges for next-gen infra enterprise clients

Legacy estate complexity and technical debt



Enterprises operate fragmented hybrid estates spanning on-premises, multiple clouds, legacy platforms, and edge. Years of incremental change have increased operational fragility, slowed down modernization, and inflated run costs, making transformation harder without risking stability.

AI workload readiness and infrastructure strain



AI, GenAI, and data-intensive workloads place new demands on infrastructure such as GPU availability, low-latency data access, scalable platforms, and resilient operations. Many existing environments are not designed to support AI at scale without re-architecture.

Operational cost pressure and efficiency mandates



CIOs face sustained pressure to reduce the total cost of ownership (TCO) of infrastructure while demand continues to grow. Manual operations, tool sprawl, and inefficient capacity utilization limit the ability to achieve meaningful cost optimization.

Talent shortages



Shortages in cloud architects, SREs, FinOps practitioners, and AI infrastructure specialists are slowing modernization and increasing dependency on service providers for both execution and operational continuity.

Security, resilience, and regulatory complexity



Expanding attack surfaces, stricter regulations, and increased uptime expectations require infrastructure that is secure, observable, and resilient by design, especially in regulated and mission-critical environments.

What do enterprises really want from next-gen IT infrastructure service providers?

AI-ready infrastructure as a dependable operating foundation

Enterprises are no longer looking at infrastructure merely as a migration target, but as the foundation for AI-native and data-intensive workloads. Expectations center on cloud-native architectures, scalable compute (including GPUs where relevant), low-latency data access, and platforms that can reliably support real-time and AI workloads without destabilizing existing hybrid and multi-cloud environments.

Integrated build-run-optimize operating models

Buyers want providers that can modernize infrastructure while running it without creating parallel teams or fragmented accountability. The expectation is for a unified operating fabric that brings together run services, automation, observability, security, and continuous optimization, enabling modernization to happen incrementally and safely rather than as disruptive, one-time programs.

Cost transparency with outcome-level accountability

Enterprises increasingly expect clear, ongoing visibility into infrastructure consumption, unit costs, and optimization levers. Traditional SLA-driven contracts are giving way to expectations around measurable outcomes such as resilience, efficiency, and performance. These are supported by the FinOps discipline, automation, and standardized platforms that help balance cost control with modernization and growth.

Security, compliance and resilience embedded by design

Security and resilience are now baseline design requirements, not optional add-ons. Enterprises, particularly in regulated and mission-critical environments, prioritize infrastructure services that integrate security controls, governance, observability, and recovery capabilities from day one, supporting regulatory compliance and operational continuity across distributed hybrid estates.

Ecosystem orchestration that reduces complexity, not adds to it

Enterprises value providers that can orchestrate hyperscalers, platforms, OEMs, and ISVs into governed, integrated delivery models. The differentiator is not the number of partnerships, but the provider's ability to align tools, enforce standards, and assume accountability across the ecosystem by simplifying operations and accelerating modernization rather than shifting complexity back to the client.

Evolving enterprise expectations and pain points

Theme	Demand side – Enterprise expectations	Supply side – Provider offerings	Key pain points to address
Technological evolution 	AI-ready, cloud-native, hybrid infrastructure that can dynamically place and govern AI workloads across cloud, edge, and on-premises	AI-native platforms with fractional GPU orchestration and policy-driven placement that turn accelerators into cost-governed, enterprise assets	Legacy platforms, inconsistent architectures, and lack of a unified control layer for real-time, data-intensive AI workloads
Operational model reinvention 	Unified run + change operations that deliver confidence per workload on cost, carbon, trust, and performance	AIOps, SRE models, agentic operations, and integrated ITSM/observability platforms operating as a telemetry-driven orchestration layer	Siloed tools, reactive operations, high mean time to repair (MTTR), and no end-to-end runtime governance across business services
Cloud and digital innovation 	Flexible hybrid and multi-cloud strategies that avoid lock-in while enforcing common policies and guardrails	Platform-led, multi-cloud landing zones with centralized policy and placement control across hyperscalers, edge, and on-premises	Cloud sprawl, cost overruns, governance gaps, and fragmented policy enforcement across environments
Security and compliance 	Built-in security, sovereignty, and compliance that can be proven at runtime for AI and data-intensive workloads	Zero-trust architectures, SecOps, compliance automation, and embedded trust orchestration integrated into the infrastructure control plane	Fragmented security controls, inconsistent sovereignty enforcement, and rising regulatory and reputational risk for AI workloads
Cost and value management 	Transparent, real-time cost and value control at workload and business-service level, not just at asset or cloud-account level	FinOps and automation-led optimization that use control-plane telemetry to balance performance, cost, and carbon continuously	Poor cost visibility, inefficient consumption, and inability to link AI and cloud spend to measurable business outcomes
Ecosystem integration 	Seamless integration across partners, platforms, and vendors under a single governance and policy model	Hyperscaler and ISV ecosystems integrated into a lifecycle control plane , with infrastructure product teams owning end-to-end services	Tool sprawl, weak integration, and multiple “islands of control” across providers and platforms

From reliable delivery to market leadership: What clients and partners expect next

Client kudos



- Innovation and modernization capability
- Strong collaboration and partnership mindset
- Skilled and experienced technical talent
- Flexibility and adaptability to client needs
- Customer-centric and responsive engagement
- Speed and execution excellence
- Quality of service and operational reliability
- Commitment to cost and efficiency outcomes
- Strong delivery governance and SLA adherence

Client critics



- Limited proactive innovation without client push
- Engagements: often implementation-focused rather than transformational
- Inconsistent business and industry context understanding
- Variability in delivery quality across accounts
- Over-reliance on offshore models in some engagements
- Gaps between marketing narrative and delivery reality
- Limited strategic foresight beyond core execution

Partner kudos



- Strong engineering depth and technical credibility
- Willingness to invest in enablement and certifications
- Openness to co-innovation and joint solution development
- Agile, responsive, and easy to work with
- Strong alignment to partner platforms and roadmaps
- Effective joint go-to-market collaboration
- Leadership-level engagement and sponsorship
- Consistent delivery against partner priorities

Partner critics



- Proactive sales and early-stage demand creation need improvement
- Brand visibility and market messaging gaps in some regions
- Commercial models still evolving toward scale and outcomes
- Inconsistent articulation of differentiation at frontline sales level
- Limited breadth of customer reference base
- Partner ecosystem prioritization (where and how much is being invested)

3

Horizons results: Next-gen IT Infrastructure Service Providers, 2026

17 service providers have been evaluated in this report

 **accenture**

birlasoft

brillio

Capgemini 

 **cognizant**

HCLTech

Hitachi Digital Services

IBM

Infosys[®]

LTM

MICRO**LAND**

 **Mphasis**
The Next Applied

 **randstad**
digital

SONATA

SONATA SOFTWARE

tcs **TATA**
CONSULTANCY
SERVICES

 **unisys**

wipro 

Note: All service providers are listed alphabetically

HFS Horizons: Takeaways for enterprises (1/2)

	What enterprises get	What enterprises should evaluate
Accenture	A globally scaled, AI-infused infrastructure transformation engine capable of driving enterprise-wide reinvention across cloud, data, security, and operations; strong ecosystem orchestration and C-suite engagement	Clear governance and commercial structure to ensure that transformation does not become overly programmatic or premium-priced without defined value milestones
Birlasoft	Platformized modernization with strong automation assets (Sigma suite), credible VMware exits, TSA-bound transitions, and execution precision	Business-level outcome articulation beyond IT metrics; stronger vertical infrastructure codification and AI-era operating model clarity
Brillio	Strong data-AI-cloud convergence positioning with agile modernization capability and engineering craftsmanship	Infrastructure operational maturity depth (AIOps, reliability engineering); proof of complex, distributed estate modernization at scale
Capgemini	Sovereign-ready, sustainability-integrated global infrastructure operations with strong regulatory alignment and distributed delivery scale. Mature automation and observability frameworks	Sharper articulation of signature differentiators within a very broad portfolio; clearer linkage of AI factory capabilities to business-level outcomes beyond capability positioning
Cognizant	An integrated AI-native operations fabric (CognitiveGrid + AIOps platforms) connecting hybrid cloud, network, and automation into a unified modernization layer; strong persona-led GTM linking infra to CFO/COO agendas	Standardization of outcome measurement (clear KPI model across engagements); simplification of branded platform constructs to improve business clarity
HCLTech	Engineering-led hybrid and multi-cloud modernization with strong AI-augmented delivery and pre-validated architectures; mature automation across infrastructure lifecycle	Elevation of the business-outcome narrative beyond operational excellence; clearer articulation of verticalized infrastructure blueprints and IT-OT convergence value in enterprise terms
Hitachi	Engineering-grade reliability with differentiated IT-OT convergence and advanced agentic operations (HARC model); strong mission-critical run capability	Elevation of the business transformation storyline beyond engineering excellence; validation of commercial flexibility and scale of global transformation examples
IBM	Hybrid cloud credibility anchored in Red Hat, mature AIOps tooling stack (Instana, Turbonomic, Apptio), and regulated-industry trust; strong FinOps integration	Clear packaging of "One IBM" services vs. product delivery; stronger articulation of network modernization and cloud-network convergence as a distinct enterprise value pillar

HFS Horizons: Takeaways for enterprises (2/2)

	What enterprises get	What enterprises should evaluate
Infosys	A highly industrialized, AI-first modernization model (Cobalt + Topaz) with strong vertical codification and factory-led transformation at scale; deep automation and platform engineering depth	Simplification of framework density for business stakeholders; clear articulation of differentiation vs. hyperscaler-native services, especially in AI infrastructure and GPU/cloud-native buildouts
LTM	A genuinely AI-native infrastructure stack (BlueVerse, knowledge fabric) with real-world deployments across hybrid, edge, and data-resilient architectures; strong engineering credibility	Translation of deep engineering capability into quantified business value models; packaging vertical strengths into repeatable, sector-specific offerings rather than case-based positioning
Microland	Mature, automation-rich operations model (intelligeni) with strong hybrid cloud, network, and workplace execution discipline	Vertical differentiation and business outcome elevation beyond operational KPIs; broader transformation narrative vs. run excellence focus
Mphasis	Governance-led modernization with a strong transition discipline and structured hybrid cloud execution	Depth of AI-native infra architecture and autonomous operations maturity; evidence of scaled, multi-country, mission-critical transformations
Randstad Digital	Engineering-led delivery pods and strong workplace/service desk modernization capabilities with talent flexibility	A structured AI-for-operations framework and deeper enterprise-grade hybrid modernization experience
Sonata	A clean, structured modernization architecture aligned to cloud-native engineering with select vertical depth	Development of AI-native infrastructure positioning and more evidence of complex, multi-stakeholder transformations
TCS	Scaled, reliable infrastructure modernization with a strong managed services heritage and a growing AI-led automation posture; a deep enterprise client base	Sharpening the next-gen infrastructure narrative beyond operational reliability; clear AI-native operating model articulation vs. established hyperscaler ecosystems
Unisys	Security-infused hybrid operations with robust governance (Cloud Business Office) and proven AIOps-driven resilience metrics	Depth of modernization and cloud-native transformation capability beyond run stability; expansion of vertical packaging outside regulated sectors
Wipro	Broad end-to-end infrastructure services capability with improving AI-led operational ambitions and global delivery reach	Execution consistency across integrated app–infra–data–security engagements; clear integration of modernization investments into a coherent, a differentiated next-gen infra narrative

HFS Horizons: Summary of service providers assessed in this report

Provides (alphabetical order)	HFS point of view
Accenture	Targets reinvention-led cloud and infrastructure transformation at scale, but must sharpen next-gen signature differentiation
Birlasoft	Advances platform-led infrastructure services through reusable IP to drive automation, scalability, and delivery consistency
Brillio	Delivers AI-first infrastructure modernization through data-led engineering and proprietary agentic platforms
Capgemini	Targets next-gen infrastructure through sovereign cloud scale and automation-driven operations across industries
Cognizant	Targets AI-first infrastructure transformation through integrated platforms, automation depth, and global execution
HCLTech	Drives modernization through engineering-led delivery, integrated platforms, and hyperscaler-aligned execution
Hitachi Digital Service	Delivers engineering-led RunOps and agentic AI operations, enabling resilient and mission-critical infrastructure platforms
IBM	Enables governed hybrid-cloud modernization through OpenShift-led consistency, embedded AIOps, and FinOps-driven execution
Infosys	Leads AI-first infrastructure modernization through industrialized platforms and globally scaled, industry-aligned execution

Provides (alphabetical order)	HFS point of view
LTM	Executes AI-native infrastructure modernization through agentic platforms to enable resilient, large-scale enterprise operations
Microland	Delivers AI-first, platform-driven infrastructure operations through measurable AIOps outcomes and engineering discipline
Mphasis	Executes regulated-industry infrastructure modernization through industrialized cloud frameworks and governance-led hybrid operations
Randstad	Executes pragmatic infrastructure modernization through engineering-led delivery and talent scale, driving dependable outcomes
Sonata Software	Operationalizes AI-first infrastructure services through reusable platforms, enabling predictable modernization outcomes
TCS	Delivers large-scale managed cloud and infrastructure operations through industrialized execution and AIOps platforms
Unisys	Enables security-infused infrastructure operations through mature AIOps and governance-led hybrid cloud execution
Wipro	Repositions toward consulting-led, AI-powered infrastructure services through integrated cloud, data, and engineering capabilities

HFS Horizons for next-gen IT infrastructure services



- Horizon 3 – Next-gen IT infrastructure native transformation providers demonstrate**
- Horizon 2 + ability to drive ecosystem synergy via collaboration across multiple organizations with common objectives around driving completely new sources of value
 - Strategy and execution capabilities at scale across complex, hybrid, and multi-cloud environments
 - Well-rounded capabilities across all value creation levers: talent, infrastructure engineering, platforms, data, security, and change
 - Comprehensive infrastructure ecosystem partnerships (hyperscalers, OEMs, ISVs) with strong PX
 - Strong infrastructure-specific IP, accelerators, platforms, and joint ventures
 - Driving co-creation with clients and ecosystem partners to enable new operating and commercial models
 - Effectively envision outcomes and provide business assurance for large-scale infrastructure transformation
 - Referenceable and satisfied clients driving new business models based on long-term infrastructure partnerships

- Horizon 2 – End-to-end experience transformation**
- Horizon 1 + ability to drive real business outcomes and stakeholder experiences through infrastructure-led transformation
 - Support clients on their end-to-end infrastructure modernization and cloud journey
 - Global capabilities with strong consulting skills and deep partnerships with all major hyperscalers
 - Broad range of infrastructure-specific partnerships and strong PX
 - Strong infrastructure and platform-specific IP
 - Proven and leading-edge proprietary assets, platforms, and automation frameworks
 - Clearly articulated infrastructure operating model aligned to business transformation
 - Capability to deliver enterprise-scale transformation programs
 - Referenceable and satisfied clients for the ability to drive infrastructure-enabled business transformation

- Horizon 1 – Operational transformation providers demonstrate**
- Ability to drive functional and cost optimization outcomes with selective infrastructure capabilities
 - Strong infrastructure implementation and migration capabilities
 - Deep engineering skills across compute, network, storage, cloud, and workplace services, driving speed and efficiency
 - Offshore-focused delivery with strong technical execution capabilities
 - Focused technology partnerships and strong PX
 - Some infrastructure-specific IP and automation assets
 - Robust fundamentals of infrastructure and technology transformation
 - Technology and capability-led delivery focus
 - Referenceable and satisfied clients for the ability to execute infrastructure transformation programs

Note: All service providers within a Horizon are listed alphabetically
Source: HFS Research, 2026

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Hitachi Digital Services profile: Next-gen IT Infrastructure Service Providers, 2026

Hitachi Digital Services: Delivers engineering-led RunOps and agentic AI operations, enabling resilient and mission-critical infrastructure platforms



Strengths	Development opportunities
• Engineering-centric RunOps model anchored in HARC: Hitachi Digital Services’ (HDS) Application Reliability Centers (HARC) integrate SRE, platform engineering, observability, FinOps, DevSecOps, and RunOps into a unified, engineering-led operations model rather than traditional siloed run services. • Advanced agentic AI architecture with multi-agent operations: The provider articulates a detailed multi-agent model spanning first-response agents, synthesis layers, database and container agents, automated remediation, and AI-driven root cause analysis (RCA), offering a clear view of AI embedded into day-to-day operations. • Multidomain “infrastructure architectonics” framework: HDS defines structured reference architectures across cloud, edge, network, ITSM, and IT-OT integration, elevating its role from an operations provider to an architectural partner for target-state infrastructure. • High-reliability, outcome-backed execution in complex environments: Case examples highlight multi-year periods without major incidents, large-scale cloud migrations with cost savings, and consistent SLA adherence across distributed, mission-critical estates. • Integrated command center with progression toward predictive operations: Unified command centers combine ITSM, observability, process mining, AI, and DevSecOps with a clear maturity path from proactive to preventive to predictive operations.	• Narrative remains highly technical for business leadership audiences: While engineering depth is a core strength, the story is less consistently translated into business agility, resilience, experience, and innovation outcomes for senior executives. • Commercial constructs and value-sharing models are under-articulated: There is limited emphasis on outcome-based pricing, elastic consumption, or gainshare constructs, which are increasingly important in transformation-led engagements. • Brand visibility and perceived transformation scale lag capability depth: Despite its strong platforms and case evidence, HDS appears less frequently in large-scale, multi-industry transformation discussions than its engineering capabilities suggest.

Relevant M&A and partnerships	Key clients	Global operations and resources	Flagship internal IP
Acquisitions (2021–2026) • synvert: German data and AI services firm (2024) Partnerships • AWS, Microsoft Azure, Google Cloud, NVIDIA, SAP, Oracle, Salesforce, Workday, Databricks, Snowflake, ServiceNow, TrustWise, Archetype AI, Xaba, StrikeReady, Ema, Lineaje, Luminai, Lyzr.ai	Number of IT infrastructure services clients: Not disclosed Key clients: Not disclosed	Headcount supporting IT infrastructure services only: Not disclosed Delivery and innovation locations • Global delivery across Japan, North America, Europe, India, and ASEAN • Offshore delivery hubs explicitly cited: India, Vietnam, and Portugal	• HARC (Hitachi Application Reliability Centers): Engineering-led RunOps, SRE, and reliability management • R202.ai Framework: GenAI and agentic AI acceleration for IT-OT operations • Integrated Command Center: Unified ITSM, observability, AI, DevSecOps, and process mining • IT-OT Convergence Stack: Cloud, edge, industrial IoT, and mission-critical platforms • 30+ proven assets and accelerators: Across cloud, data, AI, and operations

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HFS Research authors

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Ashwin is an Executive Research Leader at HFS Research. He has over 18 years of experience in the global business services (GBS) and technology services advisory space and a proven track record as a trusted advisor for C-level executives and services leaders across Fortune 2000 enterprises and service providers.

Before joining HFS, Ashwin was a director at Deloitte's GBS consulting practice, where he spearheaded consulting engagements to help clients set up, scale, and mature their global capability centers and outsourcing portfolios. He was involved in multiple initiatives covering the GBS lifecycle (strategy, design, and implementation/continuous improvement) across tech/digital, ER&D, and business operations.

He also held positions at Everest Group (incubating the Cloud and Infrastructure Services analyst and advisor practice and developing advisory offerings for enterprise IT leaders) and Evaluateserve (managing business research teams).

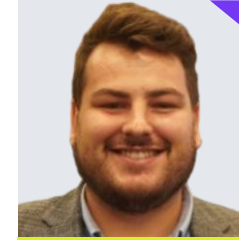


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Mayank Madhur is a Practice Leader at HFS Research, driving deep research and insights into the healthcare and life sciences verticals. He holds the Sustainability and Climate Risk (SCR) certification from GARP and is a certified Project Management Professional (PMP®).

With over a decade of experience in research, strategy, pre-sales, and software development, Mayank blends analytical rigor with execution. His professional journey began as a software engineer in the medical device domain, followed by a pre-sales position at Altimetrik, which gave him a unique perspective spanning technical development and solutioning.

He holds an MBA from BITS Pilani, a PGPM in healthcare management from LIBA, and a bachelor's degree in electrical and electronics engineering. He also completed an executive programme in strategic management from IIM Kashipur and a postgraduate diploma in public health. Reflecting his commitment to continuous learning, he is currently pursuing an MSc in applied mathematics.



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Sam Duncan is a practice leader for HFS Research, based in Cambridge, UK. He graduated from Bournemouth University with a degree in economics. His interest in macroeconomics focuses on how the evolution of technology accelerated globalization. He also studied law, accounting, and investment management.

Since joining HFS, Sam has developed his understanding of blockchain and continues exploring its latest applications across various industries. He applies his economics background to keep up with the latest banking and financial services industry trends, with a particular interest in insurance. He is a regular contributor to the HFS Market Index, a quarterly report that breaks down the performance and key events of the leading service providers throughout the previous quarter.

When he's not keeping up with the latest market developments, Sam enjoys playing for his local rugby club and can often be found sampling the output of local breweries.

About HFS

- **INNOVATIVE**
- **INTREPID**
- **BOLD**

HFS Research is a leading global research and advisory firm helping Fortune 500 companies through IT and business transformation with bold insights and actionable strategies.

With an unmatched platform to reach, advise, and influence Global 2000 executives, we empower organizations to make decisive technology and service choices. Backed by fearless research and an impartial outside perspective, our insights give you the edge to stay ahead.



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