

NEAT EVALUATION FOR HITACHI DIGITAL SERVICES:

AI-Enabled Cloud Infrastructure Management Services

Market Segment: Overall

Introduction

This is a custom report for Hitachi Digital Services presenting the findings of the 2026 NelsonHall NEAT vendor evaluation for *AI-Enabled Cloud Infrastructure Management Services* in the *Overall* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of Hitachi Digital Services for AI-enabled cloud infrastructure management services, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering AI-enabled cloud infrastructure management services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall, and with specific capabilities in AI, cloud management and orchestration, Microsoft Azure, AWS, and GCP.

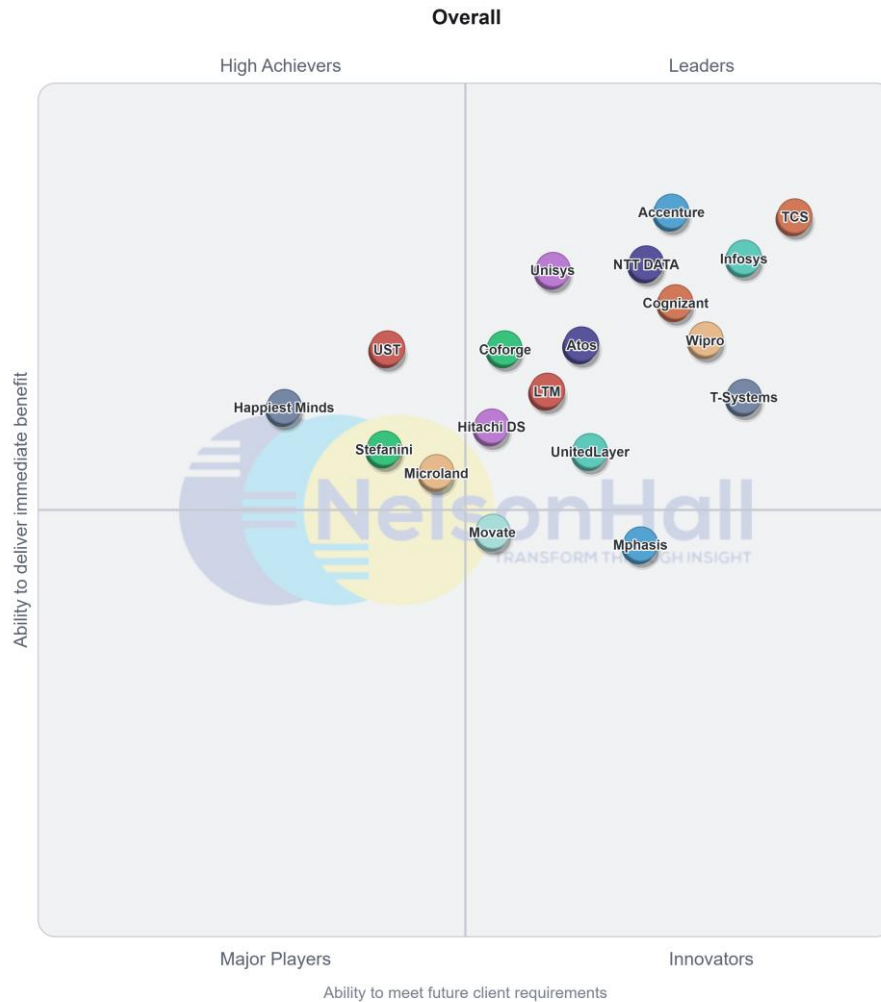
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Accenture, Atos, Coforge, Cognizant, Happiest Minds, Hitachi Digital Services, Infosys, LTM, Microland, Movate, Mphasis, NTT DATA, Stefanini, TCS, T-Systems, Unisys, UnitedLayer, UST, and Wipro.

Further explanation of the NEAT methodology is included at the end of the report.

NEAT Evaluation: Overall

AI-Enabled Cloud Infrastructure Management Services 2026



NelsonHall has identified Hitachi Digital Services as a Leader in the *Overall* market segment, as shown in the NEAT chart. This market segment reflects Hitachi Digital Services' overall ability to meet future client requirements as well as delivering immediate benefits to its cloud IT infrastructure management services clients.

Leaders are vendors that exhibit both a high ability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet client future requirements.

Buy-side organizations can access the *AI-Enabled Infrastructure Management Services* NEAT tool [here](#).

Vendor Analysis Summary for Hitachi Digital Services

Overview

Hitachi Digital Services, a Hitachi Group company, is a global systems integrator focused on the convergence between IT and OT. It applies digital technology to enable convergence, with the digital twin created on the IT side supporting core industrial domains. These include Hitachi Rail, Hitachi Energy, and smart cities, among others.

The company was initially focused on ERP in manufacturing and, over the past two years, has pivoted to grow in cloud and data services, pivoting the ERP business to Enterprise Cloud. This includes IT/OT convergence and the integration of systems relevant to the IT/OT landscape. It has incubated industrial IoT as a core capability alongside cloud, data, and ERP to support its remit as an IT/OT systems integrator.

Hitachi Digital Services' core focus covers:

- *Enterprise cloud*: includes ERP, SOR and insights, and powers enterprise functionality and capability for a modern enterprise
- *Cloud engineering*: to help clients with cloud strategy and vision, and decoupling complexity from hybrid cloud and the strategic roadmap; plus the migration, modernization, transformation and operation of cloud services
- *Data and AI*: unlocks data, data modernization, and value realization services
- *Industrial IoT*: includes MES, PLM, SCADA, etc., and from an OT perspective, the visualization, implementation and management
- *Managed services and HARC*: includes Hitachi Application Reliability Center (HARC), covering all aspects of reliability, resiliency, observability, security, and FinOps through a single pane.

Hitachi Digital Services' approach to cloud infrastructure managed services covers the full lifecycle, from standardized provisioning and configuration using infrastructure-as-code, through continuous monitoring, performance management, and controlled change processes, to ongoing cost and capacity governance.

It utilizes its GenAI and agentic AI capabilities as an intelligence layer embedded directly into cloud infrastructure management, complementing existing SRE, DevOps, and platform engineering practices. Rather than replacing tools or workflows, its agents integrate across platforms, cloud control planes, observability stacks, and ITSM platforms, including ServiceNow and Jira.

NelsonHall estimates that Hitachi Digital Services has ~15k resources supporting cloud infrastructure management services across ~500 clients globally.

Financials

NelsonHall estimates that Hitachi Digital Services' revenues from cloud infrastructure management services in CY 2025 were ~\$800m. The estimated split of revenues by geography is: North America 45%, EMEA 35%, ROW 20%. The estimated revenue split by industry sector is: manufacturing 20%, banking and financial services 15%, healthcare & life sciences: 15%, insurance 10%, telco & media 10%, transport 10%, energy & utilities 10%, high tech 5%, and retail 5%.



Strengths

- IP, accelerators, and frameworks, including CAST, Sprint2Cloud, HARC Agents, R2O2.ai, SRE maturity assessments, FMEA, observability assessment, security posture and NFR assessment, and cost analysis. Also, Hitachi Cloud Accelerator Platform (HCAP), EverFlex Infrastructure as a Service (IaaS), Hitachi iQ Studio, Infrastructure Orchestration as a Service (HIOaaS), and Operational AI Agent (Triage)
- Hitachi Application Reliability Center (HARC) integrated delivery framework
- HARC Labs to engineer modern applications through full-stack engineers, SREs, and IP tools
- HARC Agents' agentic orchestration framework to build, deploy, and manage agentic AI systems. This includes HARC Agents (industrial, operations, analytics, security, and cloud) and dedicated HARC Agents managed services use cases, and an extensive library of pre-built AI agents
- Dedicated cloud and platform engineers, SRE, and DevOps practices
- Ability to leverage wider Hitachi Group capabilities, including Hitachi Ventures
- IT/OT systems integration capabilities.

Challenges

- Growing innovation centers and CoEs in support of cloud transformation
- Continuing to expedite digital reskilling across the organization
- Ramping dedicated cloud consulting and advisory resources
- Increasing industry cloud and domain-specific capabilities, which is underway as part of the strategic roadmap.

Strategic Direction

Hitachi Digital Services is looking to expand its cloud infrastructure management capabilities through the following initiatives over the next 12-18 months:

Investing in IP and accelerators

- Maturing the Orchestrator agent framework to integrate with observability, ITSM, and deployment pipelines. Also, improved agent-assisted troubleshooting and automated runbook execution across platforms
- Expanding modular cloud operating model with reusable patterns for environment provisioning, monitoring baselines, performance guardrails, and cost governance
- Investing in proactive health and drift insights, providing predictive alerts for performance anomalies, capacity risks, and configuration drift
- Operational knowledge graph built from logs, incidents, and change history to improve accuracy
- Unified service command center with a single dashboard for platform health, incident trends, and operational KPIs



- Increasing HARC Agents frameworks and use cases
- Expanding industry cloud capabilities powering domain-specific use cases.

Partnerships and digital reskilling

- Expanding strategic partnerships with new-age AI providers through Hitachi Ventures' capabilities
- Increasing SREs across applications, incidents, and platforms. In addition, cloud architects, FinOps architects, and DevSecOps engineers
- Increasing AI skills across the organization, including GenAI and agentic AI.

Outlook

Hitachi Digital Services is increasing its investment in cloud infrastructure managed services across the full lifecycle, from, for example, provisioning and configuration using IaC, monitoring, cost and capacity governance, and ongoing managed services. It will need to continue ramping up its dedicated cloud consulting and advisory resources to support its clients' hybrid cloud transformation initiatives.

Hitachi Digital Services is embedding GenAI and agentic AI as an intelligence layer directly into cloud infrastructure management, complementing existing SRE, DevOps, and platform engineering practices. Rather than replacing tools or workflows, its agents integrate across platforms, cloud control planes, observability stacks, and ITSM platforms, including ServiceNow and Jira. This approach will resonate with clients as they seek to utilize their existing tooling investments across the cloud ecosystem.

A key investment includes its Hitachi Application Reliability Center (HARC) that integrates delivery framework and Labs to engineer modern applications with full-stack engineers and SREs. HARC provides a modular plug-and-play approach and API integration into existing client tooling. Its service catalog supports cloud run, build, migrate and deploy phases. In addition, multiple IP frameworks include, for example, CAST, Sprint2Cloud, R2O2.ai, SRE maturity assessments, observability assessments, security posture and NFR assessments, and cost analyses.

A key feature is HARC Agents, a unified agentic operating framework for building, deploying, and managing agentic AI systems; a reusable library (200 AI agents); and a unified agent control layer. The AI agents act autonomously across IT and OT environments. HARC Agents cover both functional and horizontal domains across Hitachi's business units and clients. These include industry-specific, operations, engineering, analytics, security, and cloud. In addition, it has a number of HARC Agents managed services use cases across transition, service desk, application, and cloud management.

We expect Hitachi Digital Services to increase its HARC Agents use cases and further focus on industry cloud and domain-specific use cases. HARC also provides AIOps and observability services to support proactive, preventive, and predictive operations and business experience. In addition, we expect Hitachi Digital Services to increase its strategic ecosystem partners, in particular with new-age AI companies, through its Hitachi Ventures arm. It will need to expand its dedicated Cloud and AI CoEs and innovation centers and ramp up its digital reskilling initiatives across the company, which is part of its strategic roadmap investments.



AI-Enabled Cloud Infrastructure Management Services

Market Summary

Overview

Cloud infrastructure management services are evolving as enterprises demand more AI-led services across hybrid multi-cloud environments. This includes AI-led managed services and developing infrastructure with an AI platform as-a-service approach across the full stack; and AI for infrastructure with ready-to-use platforms, IP, frameworks, and accelerators. It also includes managed services assisted by AI agents to support multiple delivery models, and expansion of agentic AI use cases. Increasingly, this encompasses agentic delivery with multiple agents to drive fully autonomous cloud operations and an intelligent delivery model; plus agents working with SREs to resolve issues and improve resilience, and expanding smart AI agent ecosystems.

There is increased investment in sovereign-by-design infrastructure in support of data, operational, and technology sovereignty; also, across AI factories, providing scalable, enterprise-grade AI infra designed to support training, inference, and agentic operations across centralized, distributed, and private AI environments. This includes managing AI infrastructure end-to-end, like a factory to run clusters, containers, and platform operations, and providing GPU-as-a-Service and an AI-sustainable data center.

Vendors are developing future-ready talent with structured cross-skilling and upskilling programs for agile delivery, expanding AI-powered learning platforms and training agents, and providing personalized AI learning pathways. In addition, they are adopting AI-enabled cloud and consulting advisory services to support an outcomes-driven approach, focusing on cloud maturity/adoption, aligning infrastructure with business goals, and increasing agility and innovation to meet clients' business outcomes.

Demand for AI-enabled cloud infrastructure management services is strong across all industry sectors, including healthcare (personalized health coach and healthcare journey agents), BFSI (AI agents across claims management, customer query, and document verification), and manufacturing (digital twin); plus retail, travel and transport, government, and energy & utilities.

Market Size & Growth

The global cloud infrastructure management services market is currently ~\$165bn and is expected to grow at 8.0% per annum, to reach ~\$224.2bn by 2030, driven by increasing demand for AI-enabled services.

North America will account for 43% of the cloud infrastructure management services market in 2030, with overall growth of 8.1%, driven by a growing adoption of AI-enabled services.

EMEA is growing at 7.6% and is expected to account for 33% of the overall market by 2030. LATAM will see steady growth through to 2030, driven by a higher propensity to adopt AI-enabled cloud infrastructure management services, while APAC will grow at 8.4% through 2030. Transport, retail, manufacturing, BFSI, telco, and public sector will see the highest growth in cloud infrastructure management services through to 2030.



Buy-Side Dynamics

The key attributes and capabilities buyers look for when selecting a vendor to deliver cloud infrastructure management services are:

- Provision of AI infrastructure services, including design and validation optimization services, MLOps, and AI platform engineering services
- Managed services assisted by AI agents to support multiple delivery models, and expansion of agentic AI use cases (e.g., AI orchestrator, specialized domain agents, and OEM agent interaction)
- Enabling autonomous operations with agentic AI
- Expanding private AI sovereign cloud capabilities and supporting data centers. In addition, sovereign cybersecurity capabilities
- Increasing industry cloud capabilities across verticals, including joint solutions and GTM with key hyperscalers and strategic ecosystem partners. This includes expanding industry solution blueprints
- Driving AI orchestration connecting functional, industry, and IT agents through a unified low-code fabric; managing through a command center to monitor, govern, and optimize every agent across the IT landscape
- Powering the AI factory with high-performance compute, storage, and networking spanning on-premises, cloud, and hybrid environments
- Developing future-ready talent with structured cross-skilling and upskilling programs for agile delivery
- Expanding AI-powered learning platforms and training agents, and providing personalized AI learning pathways
- Increasing hyperscaler-aligned certifications, local hiring, and capability realignment for SRE and AI
- Developing industry-specific skill sets across cloud and infrastructure delivery resources, utilizing domain SMEs
- Creating a lower cost baseline to feed modernization initiatives, and utilizing AI and automation to drive cost and productivity capabilities and data-driven insights for strategic decision-making
- Provision of AI-enabled operations with continuous validation, monitoring, and responsible management of AI agents to maintain reliability and safe automation
- Enabling enterprises to standardize on platform-centric models across system of record, engagement, and intelligence, choosing, for example, ServiceNow, ServiceNow + AI platform, or non-ServiceNow + AI combinations
- Ability to leverage next-generation infrastructure (private, hybrid, sovereign) to meet new requirements
- Reimagining experiences and approach to enterprise software with agentic AI
- Enabling enterprises to drive outcome-led AIOps, and selecting high-value AI use cases first and aligning the tech stack afterward to ensure meaningful, outcome-led automation



- Ensuring the right cloud (hybrid, edge, multi, and native) through sustainable, composable architecture. This includes orchestration, marketplace, and partner ecosystem, analytics, data management, and observability
- Developing infrastructure for AI, to provide a secure, sovereign, and scalable AI foundation across the stack to enable AI platform as-a-service. In addition, AI for infrastructure to help the system run, heal, optimize, and evolve through intelligence from ready-to-use platforms, frameworks, and accelerators
- Leveraging their existing AI tooling investments and looking to the vendor to provide a modular, plug-and-play approach and orchestration of all tools, including access to wider IP, frameworks, methodologies, and partner ecosystems.

Success Factors

Critical success factors for vendors within the cloud infrastructure management services market are:

- Focus on a cloud transformation factory approach, including AI-enabled discovery and planning; tech maturity and debt assessment, cloud management (FinOps), and cloud platform engineering services; AI advisory services focused on AI infrastructure assessment, sizing, and recommendations. Also, AI infra platform design and build (on-premises and public cloud with hybrid AI) and AI-ready stack
- Training all employees in AI fundamentals and responsible use, and empowering them to develop AI use cases and LLM/SLMs; AI-powered learning platforms to provide continuous learning, including hyper-personalized learning through agents; developing curated learning journeys across Copilot, Amazon Q, Gemini, and Claude, etc., and expediting full adoption of the SRE model
- Providing managed services assisted by AI agents to support multiple delivery models and providing a full lifecycle approach to plan and optimize clients' tooling investments. This includes a composable, modular, plug-and-play platform approach. Also, increasing focus on AI-led smart operations, DevSecOps, agentic AI, service intelligence, analytics, and SRE-centric models
- Utilizing the OCM framework through a dedicated practice and increasing focus on data-driven OCM to drive AI adoption across enterprises. SRE and value engineering capabilities support this and additionally support increased adoption of MCP, agentic AI, and governance
- Increased focus on sovereignty consulting and advisory services, including sovereignty maturity assessments and workload analytics to support sovereign lifecycle management. This includes developing sovereign-by-design infrastructure at scale, including data sovereignty (compliance with local and national regulations), operational sovereignty (including industry applications), and technology sovereignty (including localized AI models, AI and GPU services, including GPU-as-a-service). Plus, expanding sovereign cloud archetypes, including, for example, NVIDIA providing sovereign AI in a client's data center or through NCO partners. Also, increasing sovereign cloud offerings with hyperscalers and investments in sovereign AI-first data centers
- Deploying an agentic orchestration framework and methodology to build, deploy, and manage agentic AI systems; enabling central agent orchestration sitting above a suite of agents to coordinate agents and provide insights and autonomous decision-making across hybrid and multi-cloud environments. Also, GPU orchestration and increasing multi-domain agent orchestration and deployment



- Increased industry use cases on the edge, including BFSI (real-time transaction AI, low-latency trading, real-time fraud detection, and bank-in-a-box), healthcare (AI image processing and personalized patient journey). Also, manufacturing (predictive operations and unified IT/OT). In addition, avatar-driven agentic use cases for public sector citizens (e.g., business registration and tax refunding)
- Expanding platform engineering and the SRE model in support of full-stack monitoring and observability (including app and infra performance, availability, capacity, and compliance). Plus, further utilizing the SRE model to build resilient applications and operations, coupled with AIOps to drive self-healing and zero-touch infrastructure. Also, increasing AI agents for observability, including event correlation, anomaly detection, and health checks
- Embedding sustainability design advisory services and focusing on decarbonization level agreements (DLA). Deploying a sustainability accelerator to automate the capture of data from various application sources and devices, including OT data, and to analyze and report. Plus, embedding sustainability into cloud decisions in support of sustainable and efficient cloud
- Developing an AI factory framework with pre-defined IT Ops use cases and, where required, providing vertical add-on packs for industry-specific AI use cases preloaded in the AI factory (including agentic AI, physical AI and HPC workloads). Plus, establishing AI studios on the back of internal work and learnings to provide a standardized way for clients to build an AI factory CoE. This includes envisioning and rapid prototyping to understand the business and AI journey to value. Also, expanding AI factory operations with key strategic partners, such as NVIDIA, and applying templates to client use cases, including sovereign AI and edge templates.

Outlook

The future direction for cloud infrastructure management services will include:

- Expanding autonomous frameworks and enhancing experience through agents, and agents working with SREs to resolve issues and improve resilience. In addition, agents that scale and adopt new, modern infrastructure through a human-assisted approach. This supports autonomous IT operations through AI-driven self-service user support, self-healing incident management, and self-adapting optimization
- Increasing focus on AI-first platforms and delivery models powered by LLM orchestration and agentic automation, including agentic FinOps, agentic compliance, and agentic CloudOps for self-operating cloud environments
- Investment in decarbonization and ESG capabilities, including Green Data Centers and liquid cooling, datacenter/energy consortia, energy-aware infrastructure, and forecasting energy requirements using AI
- Development of a full-stack for AI factories across three layers: agentic-industry capabilities and private/sovereign AI infrastructure for scalable, secure, and production-ready AI; and an agentic AI factory for data sovereignty, operational development, and deployment
- Ongoing investment in sovereign cloud and expansion of capabilities across the U.K., Europe, the Middle East, Africa, India and North America (by state)
- More focus on AI-infused monitoring and analysis that integrates AI DataOps/LLMOps for real-time data ingestion



- Expanding a modular cloud operating model with reusable patterns for environment provisioning, monitoring baselines, performance guardrails, and cost governance
- Investing in AI innovation centers and CoEs to support AI infrastructure, including setting up and managing AI-specific infrastructure and running pipelines for AI infrastructure
- Managed cloud platform as a service (MCPaaS) with vendors managing all hyperscaler licenses, running all provisioning and CI/CD pipelines, FinOps, and observability
- Ramping innovation network to drive client co-innovation and partnering with client GCCs to drive transformation.



NEAT Methodology for AI-Enabled Cloud Infrastructure Management Services

NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet future client requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet future client requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.



Exhibit 1

‘Ability to deliver immediate benefit’: Assessment criteria

Assessment Category	Assessment Criteria
Offering	Cloud management platform capabilities and functionality AIOps and intelligent monitoring and observability capabilities AI infrastructure and cloud managed services Agentic AI framework and agent orchestration capabilities Industry-specific cloud offerings Sovereign AI cloud capabilities AI-enabled FinOps and cost optimization capabilities Cloud and infrastructure sustainability capabilities
Delivery	Cloud Infra Mngt North America delivery capabilities Cloud Infra Mngt EMEA delivery capabilities Cloud Infra Mngt APAC delivery capabilities Cloud Infra Mngt LATAM delivery capabilities Dedicated cloud SMEs, SREs, engineers, architects, and hyperscaler and AI-certified resources Dedicated AI Factory and agent foundry capabilities Ability to provide IP, accelerators, and frameworks to support cloud infra managed services Extent of platform engineering, SRE and DevSecOps capabilities AI-led cloud managed services and operations Extent of hyperscaler and AI partnerships in support of hybrid and multi-cloud services
Presence	Scale of Ops - Overall Scale of Ops - NA Scale of Ops - EMEA Scale of Ops - APAC Scale of Ops -LATAM Number of clients overall for cloud infrastructure management services
Benefits Achieved	Improved speed problem resolution Level of cost savings achieved Improved access to GenAI and agentic AI Increased end-user/business satisfaction Reducing agent time spent per ticket



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

Assessment Category	Assessment Criteria
Overall Future Commitment to Cloud Infrastructure Management Services	Financial rating Commitment to cloud infrastructure management Commitment to innovation in cloud infrastructure management
Investments in Cloud Infrastructure Management Services	Investment in Platforms, IP, frameworks, and accelerators in support of cloud infrastructure services Investment in GenAI and agentic AI Investment in AI Factory, including Sovereign AI Cloud services Investment in AI-enabled cloud services and Zero-Ops Investment in AI industry-specific cloud offerings and domain-specific use cases Investment in strategic partner ecosystem GTM initiatives Investment in AI-enabled training and initiatives to support an AI-first talent model Investment in AI-enabled OCM services to drive digital adoption and AI ROI
Ability to Partner and Evolve Services	Key Partner Knowledge of clients’ industry Extent to which client perceives that innovation has been delivered Ability to evolve services

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.

**Sales Inquiries**

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:
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