

# Hyperscaler Cloud Service Providers Top 10

Excerpt for IBM

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“The journey to Cloud Native is about a migration of the business to the cloud, not just the technology. These service providers are enabling companies to follow a cloud services value stream to achieve desired goals for their people, process, and culture while amplifying their customer’s OneOffice.”

*Joel Martin, VP Cloud Strategies*

# CONTENTS

1

Introduction, definitions, and methodology

4

2

Executive report summary

10

3

Top 10 results: Hyperscaler cloud service providers 2021

12

4

Hyperscaler cloud service providers profiles

18

5

Market insights

20

6

About the authors

24



# Introduction, definitions, and methodology

# Introduction

## 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.

# Research methodology

This research is the result of data collected in 2020 through provider RFIs, structured briefings, client reference interviews, and from 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 a minimum of 10,000 cloud professionals, services across the cloud services value stream, and scale to provide global and cross industry services. Detailed analysis and profiles of hyperscaler cloud service providers with less than 10,000 professionals are covered in additional research provided by HFS.

Hyperscaler cloud service providers were assessed on the following three main dimensions with weighting of each provided:



## Voice of the customer (weight)

- Candid feedback from client references and over 600 G2000 responses to the IT services satisfaction survey (100%)



## Ability to execute (weight)

- Partnerships (10%)
- Talent and development (35%)
- Scale, breadth, and reach (30%)
- Commercial models and pricing (25%)



## Innovation capability (weight)

- Marketing and thought leadership (30%)
- IP and accelerators (15%)
- Investment roadmap (20%)
- Consulting and professional services (35%)

# Research definitions

- **Hyperscaler:** Provides computing architecture to appropriately scale as customers increase system demand. Hyperscaling typically involves seamlessly provisioning and adding compute, memory, networking, and storage resources to a given node or set of nodes that comprise a larger computing, distributed computing, or grid computing environment. Examples of hyperscalers are Amazon AWS, Microsoft Azure, Google GCP, Alibaba AliCloud, IBM, and Oracle.
- **Hyperscaler cloud service providers:** 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., a 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 towards a goal of providing cloud native solutions and architecture.
- **Cloud native:** Cloud-native computing is a software development approach that utilizes cloud computing to “build and run scalable applications in modern, dynamic environments such as public, private, and hybrid clouds.”

# Hyperscale Cloud Service Providers covered in this report



# Sources of data

This report relied on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the 12 hyperscaler cloud service 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, as well as data collected from a series of studies conducted throughout 2020.



## Other data sources

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



# Executive report summary

# Summary points

The cloud market evolves with the major hyperscale incumbents

The hyperscaler cloud service 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 each other for market share.

Global service providers provide a compelling narrative to grow

Rebadging discrete solutions into a “cloud ready” offering isn’t enough; service providers must have a compelling story for both technology and business leaders on how their solutions have sustainable impact and meet robust security and governance requirements while accelerating a shift to becoming cloud native. Worth noting is that business leaders are more likely to consider traditional technology outsourcers as they are still focused on costs and efficiencies, while technology leaders look to GBS to provide business context to the cloud. The winning hyperscaler service providers will offer both.

Communicate value stream, not a product narrative

Many of the companies we reviewed still offer discrete packages of products for tailor-made needs 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. Infosys’ Cobalt and Accenture’s MyNav are good examples of how this can be achieved.

Talent is key

As enterprises adopt and migrate more solutions to the cloud, service providers must be able to bring talent and experience working across leading platforms. Service providers will eagerly acquire smaller companies with this expertise to augment their abilities. Service providers will also offer many companies an option to re-patriate some of their resources to the provider to provide localized support and experience as they jointly adopt cloud native architectures.

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. DevSecOps, testing, quality assurance, and CI/CD managers are all important, but enterprises and service providers must start with the architecture in place and a vision for change. Failing to do so will create more technology debt, not reduce it. The goal of becoming cloud native must be to create technology wealth, and this begins with how you architect your systems to deliver value to the business.



# Top 10 results: Hyperscaler cloud service providers 2021

# Hyperscaler cloud service providers: A summary of providers assessed in this report

Provider ( <i>alphabetical</i> )	HFS point of view on hyperscaler cloud service provider capabilities
<b>Accenture</b>	Solution-rich provider leading with business-first innovation and bolstering talent through acquisitions
<b>Atos</b>	Mature systems-integration player with a wide range of tools and partnerships and a strong expertise in digital transformation efforts
<b>Capgemini</b>	Heavyweight cloud service player with industry-specific expertise and partner ecosystem
<b>Cognizant</b>	High-quality talent with a commitment to flexibility
<b>DXC</b>	Infrastructure heavyweight with a global delivery capability
<b>EY</b>	Provider of deep industry expertise and business strategy
<b>HCL</b>	Competitive cloud player with a focus on pragmatic solutions
<b>IBM</b>	A hyperscaler and provider with an evolving partner and product ecosystem for multi-cloud capabilities
<b>Infosys</b>	Robust provider with stack of solutions supported by a strong base of talent and tools
<b>KPMG</b>	Consulting heavyweight with a clear vision for enterprise cloud governance and risk management
<b>TCS</b>	Global delivery capability combined with deep contextual and domain knowledge
<b>Wipro</b>	Bringing a high-value toolbox to client engagements

# HFS Top 10 hyperscaler cloud service providers rankings

Rank	Overall HFS Top 10 position	Execution					Innovation					Voice of the customer
		Partnerships	Talent and development	Breadth, scale, and reach	Pricing and commercial models	Overall execution	Marketing and thought leadership	IP and accelerators	Investment roadmap	Consulting and professional services	Overall innovation	
#1	accenture	accenture	accenture	IBM	HCL	IBM	accenture	IBM	accenture	accenture	accenture	IBM
#2	IBM	wipro	Infosys	accenture	Cognizant	accenture	IBM	accenture	IBM	IBM	IBM	accenture
#3	Infosys	Infosys	IBM	HCL	wipro	Infosys	Cognizant	Infosys	Infosys	EY	Infosys	Cognizant
#4	Cognizant	IBM	tcs   TATA CONSULTANCY SERVICES	Infosys	tcs   TATA CONSULTANCY SERVICES	HCL	Infosys	tcs   TATA CONSULTANCY SERVICES	wipro	Capgemini	Cognizant	Infosys
#5	HCL	Cognizant	HCL	tcs   TATA CONSULTANCY SERVICES	Infosys	tcs   TATA CONSULTANCY SERVICES	tcs   TATA CONSULTANCY SERVICES	Cognizant	Cognizant	tcs   TATA CONSULTANCY SERVICES	tcs   TATA CONSULTANCY SERVICES	HCL
#6	wipro	tcs   TATA CONSULTANCY SERVICES	Cognizant	DXC technology	Capgemini	wipro	KPMG	wipro	Capgemini	Infosys	Capgemini	KPMG
#7	tcs   TATA CONSULTANCY SERVICES	HCL	wipro	wipro	IBM	Cognizant	EY	HCL	HCL	KPMG	wipro	EY
#8	Capgemini	Capgemini	Capgemini	Cognizant	DXC technology	DXC technology	Capgemini	Capgemini	tcs   TATA CONSULTANCY SERVICES	wipro	EY	Capgemini
#9	KPMG	DXC technology	EY	Atos	Atos	Capgemini	wipro	DXC technology	KPMG	Cognizant	KPMG	Atos
#10	EY	Atos	Atos	Capgemini	EY	Atos	HCL	KPMG	EY	Atos	HCL	wipro

\*Note: Direct information was not provided by Wipro, TCS, ATOS, EY

# Notable performances in HFS Top 10 hyperscaler cloud service providers

## HFS Podium Winners

Top three providers overall across execution, innovation, and voice of the customer criteria

#1. 			#2 			#3. 		
<b>Execution powerhouses</b> Top three providers on execution criteria			<b>Innovation champions</b> Top three providers on innovation criteria			<b>Outstanding voice of the customer</b> Top three providers on voice of the customer criteria		
#1 	#2 	#3 	#1 	#2 	#3 	#1 	#2 	#3 

## Other notable performances

- EY for its strong talents and developments alongside effective consulting and professional services
- Capgemini for delivering consulting and professional services with a correspondingly robust talents and development initiatives
- Wipro for its massive partnership ecosystem, and bringing high value IP and accelerators to the clients

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

# 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 HFS framework for the services that should be used to enable this migration.



*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 compliment 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 towards a cloud-centric deployment.

*Assessment* identifies and focuses teams on systems that are or are not compliant with the new architecture required to deploy, support and manage in 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 take place. Both automated and physical efforts, tools, and talent is 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 bare 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.

# Additional Research: Market analysis of disruptive Hyperscaler Cloud Service Providers

- As organizations invest in becoming cloud native, we are seeing a group of disruptive vendors taking center stage in many deals. These vendors compete on industry, geography, and specific cloud skills, offering compelling reasons for companies to consider them for their hybrid and multi-cloud needs.
- These vendors have, or are developing, deep relationships with the hyperscalers and bring their own cloud value stream solutions to meet customer needs for assessing, migrating, and managing solutions. What often sets these vendors apart from those covered in more detail in this research is their cloud practice is typically smaller (<5,000 professional dedicated globally, revenues in the \$100 million range, and often their certification as a percentage of cloud professionals may be higher than larger firms).
- In a second report titled: **Market Analysis Disruptive Hyperscaler Cloud Service Providers**, HFS profiles each 11 of these vendors, their solutions, and summarizes why the market is ripe for these vendors to have an impact.

## Vendors covered:

Coforge

FUJITSU

HEXAWARE

LTI  
Let's Solve

Mphasis  
The Next Applied

NTT DATA

Persistent

Tech  
Mahindra

UNISYS

virtusa

ZenSar

An aerial, grayscale photograph of a dense city skyline, likely New York City. The Empire State Building is prominent on the right side. A large, semi-transparent white number '4' is overlaid on the left side of the image. A vertical orange bar is positioned to the right of the number '4'.

# Hyperscaler cloud service providers profiles

# A hyperscaler and a provider with an evolving partner and product ecosystem for multi-cloud capabilities



Dimension	Rank	Strengths	Opportunities
HFS Top 10 position	# 2	<ul style="list-style-type: none"> <li><b>Full set of services focused on hybrid and multi-cloud scenarios:</b> IBM's cloud services excel in the most complex engagements where customers have hyperscale transformation needs alongside legacy systems that require management and integration. IBM is leveraging its infrastructure management heritage to effectively manage across technology stacks.</li> <li><b>RedHat completes IBM's service story in the cloud:</b> The acquisition of RedHat shifted the focus of IBM's cloud services away from a very "IBM Cloud" view of the world toward a more truly hybrid and multi-cloud view.</li> <li><b>Strong set of solutions and accelerators:</b> IBM has one of the strongest sets of solutions coupled with the most mature management and transformation accelerators and platforms.</li> <li><b>Investment in hyperscale partnerships:</b> IBM's new focus on multi-cloud includes investment in product portfolio aimed at managing the cloud.</li> <li><b>Strong automation IP:</b> IBM's embedded its automation focus within its platform and accelerators to good effect.</li> <li><b>Governance and security solutions:</b> Cloud transformation requires more due diligence in policy, governance, and security. IBM has assembled strong building blocks and developed clear offerings around these.</li> </ul>	<ul style="list-style-type: none"> <li><b>Playing catch up with hyperscale partnerships:</b> Since acquiring RedHat, IBM has focused more on partnering to offer a more credible set of multi-cloud and specific offerings for services on other hyperscale providers.</li> <li><b>Cost-saving message:</b> COVID has been driving migration to the cloud at a record pace; however, managing costs continues to be a priority for most organizations. IBM needs to ensure a value equation for its offerings is clearly in place.</li> <li><b>Demonstrating its flexibility:</b> IBM must convince customers that its Red Hat's Open Stack and Garage Methods solutions don't lock you into IBM, but rather provide a rich tapestry for multi-cloud orchestration.</li> <li><b>Drive abstraction:</b> The next wave of cloud native journeys will focus on abstracting the functionality to edge and serverless computing. IBMs must use its long history to its advantage to drive this conversation in the market.</li> </ul>
Ability to execute	# 1		
Talent and development	# 3		
Partnerships	# 4		
Breadth, scale and reach	# 1		
Pricing and commercial models	# 7		
Innovation capability	# 2		
<b>Key clients</b> Etihad Airways, Thomson Reuters, Phillips Carbon Black Limited, Social Security Scotland, ABM Investama, Weston Foods, Oriflame, TM International Logistics			
Marketing and thought leadership	# 2	<b>Key partnerships</b> <ul style="list-style-type: none"> <li><b>Hyperscale partners:</b> AWS, Azure, Google Cloud, Alibaba, Oracle</li> <li><b>Global strategic partners:</b> VMware, Red Hat</li> </ul>	<b>Solution overviews</b> <ul style="list-style-type: none"> <li><b>IBM Garage Method for Cloud:</b> End-to-end cloud solution delivery methodology for hybrid, multi-cloud transformation.</li> <li><b>Multi-cloud Management Platform (MCMP):</b> Digital consumption and delivery platform with integration and orchestration layers that support multiple technology stacks across a multivendor platform.</li> <li><b>IBM Automation Platform:</b> Combines enterprise automation, cloud, RPA, and AI—all scalable and secure across the enterprise.</li> <li><b>MCMS Management Tool Solution for Hyperscalers (IBM, AWS, Azure, Google, AliCloud):</b> Pre-integrated solution to monitor and manage multi-clouds.</li> <li><b>IBM CACF (Cloud Automation Community Framework):</b> A service delivery automation framework based on Ansible Tower.</li> <li><b>IBM DevOps Commander:</b> Asset that accelerates DevOps deployment through the centralized management of software delivery pipelines.</li> <li><b>Cloud Advisory Tool:</b> A dynamic and customizable rule engine that generates an assessment of the application portfolio using industry-specific rules and advanced analytics.</li> <li><b>Cloud Transformation Advisor:</b> A tool based on cloud affinity rules to evaluate application migration feasibility to the cloud.</li> <li><b>Application Containerization Advisor:</b> A machine learning-based tool powered by Explainability algorithms that determine which applications can be containerized.</li> </ul>
IP and accelerators	# 1		
Consulting and professional services	# 2		
Investments and roadmap	# 2		
Voice of the customer	# 1		
		<b>Talent pool</b> <ul style="list-style-type: none"> <li><b>Cloud professionals:</b> <ul style="list-style-type: none"> <li>IBM does not disclose the number of its cloud professionals.</li> <li>HFS estimates 60,000+</li> </ul> </li> <li><b>Certified associates:</b> <ul style="list-style-type: none"> <li>IBM has 30,000+ certifications across all major platforms</li> </ul> </li> </ul>	



# Market insights

# 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. This approach could also result from a fear of lock-in or a quest for best-in-breed capabilities spread across hyperscale services.

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, regardless of platform using Kubernetes, microservices, and edge computing tools. The concern is how a next generation of technology debt may be created as applications, data, and workflows will reside on separate platforms. This is 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 a key challenge. Some enterprises could have utilized their cloud budget in more optimal ways. Customers seek service providers with the expertise to optimize their subscriptions and cloud usage and deliver solutions.

# Market dynamics: What do buyers want from providers?

## Bring flexibility and transparency

In the cloud services market, this extends to flexibility and transparency. In terms of flexibility, enterprises are looking for partners willing to bring resources to engagements to tackle the challenge—whatever the challenge may be. Many enterprises advised that providers who are too sales focused quickly fall out of favor in a competitive market. Providers are bringing more innovative pricing strategies and cost-tracking methodologies to ensure enterprises have full oversight of their public cloud spending.

## 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 deal and pricing out of engagements. In addition to this, 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.

## Access to talent

A major motivation is ensuring providers have the talent necessary to build out comprehensive and coherent cloud and infrastructure roadmaps. In an increasingly hostile talent war, enterprises want to work with providers that are somewhat insulated, with strict assurance that talent pools are deep enough to weather the fluid labor market.

## An innovative provider

Buyers are looking for speed-to-market tools and accelerators during their cloud journey, and also prefer to leverage providers' industry expertise and cloud experiences. Providers must have such capabilities to accommodate in its offerings. If there is a business requirement, providers must be capable of setting co-innovative labs or hubs in association with buyers in different geographies.

## Help with architecture

Most organizations will have hundreds of systems connecting across thousands of APIs, connectors, and databases, which will be on multiple platforms, both on-premise and in the public cloud. Often custom code has been developed by people no longer in the business and development, support, and business users will often be siloed. Business and technology buyers want partners who can help implement change without risking their business. Partners should have strong platform architects that can work alongside teams to ascertain, define, and deploy solutions that will reduce the technical debt while driving up value.

# Market trends: Hyperscaler overviews

AWS presents compelling proposition to more industries

AWS continues its role as the leader of cloud compute offerings. 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 its 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 is winning loyalty

Azure, Microsoft's cloud offering, has held somewhat of a privileged position among enterprises and providers alike. Foremost, many business 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 with a focus on winning over 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 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 centres and delivery capabilities in rapidly growing economics, 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, which presents the firm as somewhat of a quandary when it comes to conflicting business interests with firms that would naturally ally to hyperscale firms. That being said, IBM's new leadership has renewed focus on cloud capabilities. Its 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*.



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## 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.

Read more about HFS and our initiatives on [www.HFSresearch.com](http://www.HFSresearch.com) or follow [@HFSResearch](https://twitter.com/HFSResearch).

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