HfS Blueprint Report

IT Infrastructure Management and Enterprise Cloud Services 2017
Excerpt for Cognizant
July 2017
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Executive Summary
Introduction to the HfS Blueprint Report: IT Infrastructure Management and Enterprise Cloud Services

- The 2017 HfS IT Infrastructure Management and Enterprise Cloud Services Blueprint Report provides a market overview and evaluation of the largest providers of enterprise infrastructure managed services. It focuses on the buyer needs of organizations with more than $1 billion revenue.

- Unlike other quadrants and matrices, the HfS Blueprint identifies relevant differentials between service providers across a number of facets in two main categories, innovation and execution.

- This Blueprint Report looks at the innovation and execution capabilities of 22 service providers in detail.
How do we define infrastructure management services?

- IT infrastructure management includes data center and server outsourcing, network management, and end-user workspace management.

  - **Server management.** This involves the service provider taking over the day-to-day management of a client’s server infrastructure, including co-located and hosted infrastructures. It includes all services required to support and manage server, mainframe, and enterprise storage systems. It can include backup/recovery/business continuity, LAN/WAN network services, security, cloud-based virtual machines, and remote management. It provides support and management to the operating system and enterprise middleware level, for example, providing the platform for enterprise application. The service can be provided onsite or remotely.

  - **Network management.** This involves the service provider taking over the day-to-day management of LAN/WAN infrastructure.

  - **End-user workspace management.** This involves the service provider taking over the day-to-day management of a client’s desktop and client fleet and the infrastructure in which it operates, such as LAN and helpdesk. Includes IMACS, service desk and help desk provision, LAN management, BYOD, messaging (email, IM, VOIP), and input/output device management (scan and print infrastructure).
Enterprise Cloud Management

- Enterprise cloud management is the operation of public, private, and hybrid cloud environments within an enterprise organization framework.

- Offerings can include management platforms that provide a range of services including workload optimization, orchestration services, provisioning systems, self service, metering individually and across cloud variants, billing, configuration management, resourcing planning, and service catalogues.

- It is often delivered as part of hybrid cloud infrastructure.

- A hybrid cloud is a mixture of different cloud variants – private on premise, private managed cloud, private hosted cloud, and public cloud services. To be truly hybrid, it must have a level of orchestration and service management.
Market Overview
Challenges Facing IT Departments

- The rise of consumer IT and telecommunications, seeded by the Internet and driven by the introduction of smart phones and tablets, has had a dramatic impact on attitudes toward IT, where business executives expect the same quality of IT experience in the workplace that they get in their personal lives.

- There can be little argument that the future of IT services is tied to the impact of Digital technologies (social, mobility, analytics, and cloud. Even the most skeptical observers contend that Digital is, at least, an important step forward, even if the details (and definition) of exactly how it will manifest are not yet clear.

- The whole ethos behind the Digital movement is linked to the use of technology to help clients transform their business models. This is rubbing off on service providers that want to use this technology themselves to raise the value of their customer relationships by bringing them closer to their customers.

- The quality of service delivery has improved over the last 10 years, driven in no small way by the rise of the offshore-centric providers, whose willingness to go the extra mile to ensure client satisfaction while driving down the cost of delivery has improved the service experience considerably. In part, the discipline required to manage an offshore delivery business entails that processes have to be standardized and evolved to make it functional.

- These forces have changed clients expectations and attitudes toward IT forever and IT services provider need to take a different approach to managing their customer relationships to keep adding value. The next slide shows the change new As-a-Service attitudes are having to traditional IT Services, shifting the service mindset from “can’t do” toward a “can do” attitude.
# New Style of IT Outsourcing Requires Shift in Attitude

## Legacy “Can’t Do” IT vs. As-a-Service Attitude vs. As-a-Service “Can Do” IT

<table>
<thead>
<tr>
<th>Proscriptive Relationship</th>
<th>Collaborative Partnership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complicated</td>
<td>Simplified</td>
</tr>
<tr>
<td>Proprietary</td>
<td>Open</td>
</tr>
<tr>
<td>Controlling users keeps things working</td>
<td>Enabling users to work at the most productive level</td>
</tr>
<tr>
<td>Reliant on Individual excellence</td>
<td>Reliant on process excellence</td>
</tr>
<tr>
<td>IT is the designer and builder</td>
<td>Services designed in partnership with the business</td>
</tr>
<tr>
<td>Tied down</td>
<td>Agile and responsive</td>
</tr>
<tr>
<td>Hard coded solutions</td>
<td>Configurable solutions</td>
</tr>
<tr>
<td>Problems are emphasized</td>
<td>Business benefits are emphasized</td>
</tr>
<tr>
<td>Applications designed for IT to support</td>
<td>Applications designed for the business to use</td>
</tr>
<tr>
<td>Services are standardized and controlled</td>
<td>Services offer flexibility and choice</td>
</tr>
<tr>
<td>Fear, uncertainty and doubt fuel reaction to security</td>
<td>Measured response to security</td>
</tr>
<tr>
<td>Data-Center based infrastructure</td>
<td>Cloud based infrastructure</td>
</tr>
</tbody>
</table>

- **Proscriptive Relationship**
  - Complicated
  - Proprietary
  - Controlling users keeps things working
  - Reliant on Individual excellence
  - IT is the designer and builder
  - Tied down
  - Hard coded solutions
  - Problems are emphasized
  - Applications designed for IT to support
  - Services are standardized and controlled
  - Fear, uncertainty and doubt fuel reaction to security
  - Data-Center based infrastructure

- **Collaborative Partnership**
  - Simplified
  - Open
  - Enabling users to work at the most productive level
  - Reliant on process excellence
  - Services designed in partnership with the business
  - Agile and responsive
  - Configurable solutions
  - Business benefits are emphasized
  - Applications designed for the business to use
  - Services offer flexibility and choice
  - Measured response to security
  - Cloud based infrastructure
Challenges Facing IT Departments

CIOs are looking for:

- The main barrier to providing digital to customers is speed of operations: CIOs want to make IT more focused on the customer, which will entice internal lines of business (LoB).

- Focus shifted away from operate to build: Day-to-day IT needs to be more secure and more manageable.

- Help determining future operating model: They seek a model that has flexibility to cope with massive changes in demand but is cheaper and easier to change and adapt.

- Employing the cloud: They want to know how to incorporate cloud and broad software defined data-center approaches to IT.

- Help taking business impactful technology to business: Keep using mobility, analytics, and cloud; increasingly use automation, cognitive, and IoT.

- Transparency: IT needs transparency of both the costs that make up services and the way services are delivered. A black box approach to outsourcing is no longer valid given competition from SaaS and cloud providers direct to Lines of Business (LoB).

- Credibility: They are wrestling back credibility (and control) from lines of business.

- Brokers of capability: CIO and IT department need help to become broker of capability, at least for technology.

- Measurable success: IT departments expect business outcomes when buying application services.

- Testing tools: They need ways to manage increasingly large and complex testing environments.
Infrastructure Services and the Digital OneOffice Organization

- Furthermore, when seeking to understand the challenges and priorities of modern business and IT leaders, the conversation rarely strays far from the realms of digital transformation. Indeed, business digitalisation takes up an unprecedented amount of mindshare amongst business leaders as they strive to make their organisation competitive in the everchanging digital economy. HfS Research has developed a framework to support businesses on their journey, titled the Digital OneOffice, which seeks to drive alignment, efficiency, consistency and value throughout the modern business – from the back-office through the middle-office to the front-office.

- One of the key tenets of the Digital OneOffice Organization concept is categorised under the Digital Underbelly, of which infrastructure management and enterprise cloud services play an integral role. The cloudification of processes – which allows for vital business processes to be securely and reliable replicated and scaled across the business – is essential to meet the speed and agility required of a modern digital business.

- Similarly, digital companies will need to adopt a focus on the cloudification of IT and Software if their companies are to respond and scale swiftly to peaks in demand. The cloudification of IT and software provides a raft of benefits – such as greater transparency and alignment – however, the real driver must be how the cloud fits into the bigger picture of digitalisation. Cloudification of back-office services iteratively supports the efficiencies that are realised in other sections of the Digital OneOffice, by providing easier access to automation activities, or by providing true business-wide analytical oversight, as an example.
Infrastructure Services and the Digital OneOffice Organization

The Digital OneOffice™ Organization

The Customer-First Digital Organization

- Mobile Engagement
- Social and interactive
- Design Thinking
- Real-time actionable data for greater personalization

The Enabling Intelligent OneOffice

- Digital Underbelly
  - Digitization of manual processes
  - Automation and standardization of processes
  - Cloudification of processes
  - Cloudification of IT and software

- Intelligent Digital Support Functions
  - IT Support, Finance, HR, Procurement, Supply Chain
  - Design Thinking to unify outcomes
  - Broadening of roles

- Intelligent Digital Processes
  - Predictive and operational analytics
  - Cognitive and Artificial Intelligence
  - Internet of Things
IT Outsourcing Market Commentary

- Data center technologies have changed the way IT Infrastructure Services are bought. Extreme automation and virtualisation is taking the enterprise IT department toward fully software-defined data center architectures in which all of the physical components are virtual – not just computing power, but also networking and storage. This promotes increasing levels of efficiency saving, driving up availability and manageability whilst reducing cost. This also improves the flexibility of the underlying architecture, which means reconfigurations and upgrades can be handled through software rather than reconfiguring the hardware layer. This reduces risk and makes it faster, a configuration that allows for better security and cheaper disaster recovery services.

- We expect both hybrid and private cloud adoption to expand as companies continue to spend money on data center modernization, largely prompted by the desire to simplify and make the compute more flexible.

- Public cloud services continue to grow and are sold directly and through managed service partners or brokers.

- Old-school large IT outsourcing deals will continue, but with a large dose of consulting and transformation. IT departments need to focus on adding value and transforming their businesses, not transforming their IT.
Leading Service Providers’ Infrastructure Management Services – Estimated Global Global Revenue

USD billions

- IBM: 14.1
- Fujitsu: 11.5
- AWS: 10.1
- DXC: 9.1
- Atos: 6.6
- Capgemini: 4.3
- NTT Data: 4.3
- T-Systems: 4.1
- SamsungSDS: 3.8
- Microsoft: 3.6
- CGI: 3.2
- Accenture: 2.9
- TCS: 2.7
- HCL: 2.7
- BT: 2.1

This chart shows our estimate of the infrastructure management services revenues for the leading providers. We estimate based on publicly stated financial statements.
Major Market Changes – 2016 - 2017

- The past 12 months have witnessed significant change in the IT services space, with mergers and acquisitions altering the landscape considerably. A list drawn up in early 2016 – such as HfS’ annual Top 25 IT Services Companies – would have included four large firms that have since reduced to two in 2017. HPE and CSC have merged to form DXC, a firm now with considerable scale and reach in the IT Services space. Additionally, NTT Data finalised the acquisition of Dell Services to similarly broaden its reach, scale, and depth in the space.

- Consolidation at the higher end of the market, led by these two large deals, has changed the game for a lot of providers. Many are now actively leveraging the talent, resources, and access of key acquisitions to shore up their IT Services offerings.

- In the Infrastructure and Cloud Enterprise space particularly, the scope and scale of alliances and partnerships are expanding to support and expand upon provider offerings. The large as-a-service providers of cloud services are becoming must-have partners for many of the IT Services firms, offering them flexibility and scale when they need it, which can then be passed onto clients.

- It’s no surprise then, to see the large born-in-the-cloud as-a-service providers solidifying their position in the space, with the recent Top 25 IT Services Companies reporting placing AWS in the top 10 for the first time since the report began.
Major Market Changes – 2016 - 2017

That’s not to say it’s the end for IT Services as we know them. Several firms are adapting their approach in several key ways. Firstly, some traditional-focused providers are hedging their bets and expanding into more as-a-service led approaches. Meanwhile, others in their cohort are sticking to their guns and refocusing on the value traditional models can offer – with the understanding that some clients are unlikely to move away from build-and-manage or lift-and-shift engagements in the near future.

In the middle are a developing breed of providers that are seeking to limit their direct involvement with data centers and physical infrastructure by offering clients services through a brokerage model. These firms are offering clients the opportunity to select best-in-class services or those that are most suitable to their operation.

Other firms are more decidedly moving into the transformation space, adapting their infrastructure and cloud services portfolio to better represent the bigger picture. These firms are taking the strategic decision to turn-down traditional deals in favour of more the lucrative and broader transformation engagements.

In many ways, providers are becoming more divided while remaining relatively similar in approach. They’re seeking to broaden their offerings while at the same time become more selective and distinct. If one thing is clear, the IT Services space is so broad, there is plenty of room at the table for a range of approaches – as long as clients can still see the value in them.
# IT Outsourcing – As-a-Service Global 2016-2021 ($ billions)

## USD billions

<table>
<thead>
<tr>
<th>Year</th>
<th>Traditional IT Services</th>
<th>AAS IT Services</th>
<th>Total IT Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>444</td>
<td>102</td>
<td>546</td>
</tr>
<tr>
<td>2017</td>
<td>435</td>
<td>127</td>
<td>562</td>
</tr>
<tr>
<td>2018</td>
<td>426</td>
<td>153</td>
<td>579</td>
</tr>
<tr>
<td>2019</td>
<td>416</td>
<td>182</td>
<td>598</td>
</tr>
<tr>
<td>2020</td>
<td>408</td>
<td>214</td>
<td>622</td>
</tr>
<tr>
<td>2021</td>
<td>394</td>
<td>248</td>
<td>642</td>
</tr>
</tbody>
</table>
As-a-Service Increases Market Share

- With AWS making its way into the top 10 of HfS’ Top 25 IT companies high-value IT list, it’s no surprise to see the broader encroachment of as-a-service IT services into the traditional space. The graph on the previous page provides a detailed projection of IT Services global growth, of which as-a-service is growing significantly, followed by noticeable reductions in traditional IT Services global revenues.

- This trend indicates that the as-a-service cloud firms such as Google, Microsoft, and AWS are in for an easier few years than are providers focused on traditional IT services. However, it’s likely we’ll see a blurrier marketplace in the future as some firms seek to retain their position as the trusted traditional infrastructure provider, while others seek to evolve their model to join the as-a-service providers. Somewhere in the middle will be the bulk of current providers seeking to keep their hand in traditional services while leveraging the growth of as-a-service demand to drive service brokerage, SIAM, and their own bespoke offerings forward.

- The latter hybrid model makes commercial sense currently, albeit with a limited lifespan as the as-a-service market increases market share at an accelerating pace. If the trend continues, we can expect to see the bulk of providers adapting to meet demand for as-a-service offerings over the next 10 years.

- Isolating infrastructure management revenues by geographic region in the graph on the next page provides a more detailed picture of traditional IT revenues’ downward trend.
IT Infrastructure Management Market by Region 2016 – 2021 ($ billions)

USD billions

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>$120</td>
<td>$100</td>
<td>$80</td>
<td>$60</td>
<td>$40</td>
<td>$20</td>
</tr>
</tbody>
</table>

CAGR

- Japan
- Rest of AP
- ANZ
- LATAM
- MEA
- Eastern Europe
- UKI
- Continental Europe
- North America

2016: $120 billion
2017: $100 billion
2018: $80 billion
2019: $60 billion
2020: $40 billion
2021: $20 billion
IT Infrastructure Management Market in steep decline

- It’s become clear that demand for traditional on-premise management is in free fall – as enterprises opt for asset-light and cloud platform-based hybrid solutions. Indeed, moving forward the focus has shifted toward cloud and converged/software defined infrastructures.

- We can see a marked decline in traditional services overall, with a representative decline in all geographies with the exception of the Middle East and Africa. Japan, Continental Europe, and UK and Ireland can expect traditional IT revenues to decrease by more than three percent.

- It is no surprise, then, that a large proportion of the provider market has opted to become more selective in the type of engagements they are willing to undertake in the traditional IT Services space, with some strategically shifting their offerings to avoid traditional engagement altogether.

- If one thing has been clear from the analysis and research in this report, it’s that the infrastructure market is impacted by major trends – particularly the unstoppable shift to the as-a-service economy – which are making the market blurrier in the interim as providers grapple to define their vision and strategy for the future.
Research Methodology
Research Methodology

Data Summary

- Data collected in Q1 and Q2 2017 covered services buyers, service providers, and advisors/influencers of IT and Digital Services

These HfS Blueprints are Based On:

- **Tales from the Trenches:** Interviews are being conducted with buyers who have evaluated service providers and experienced their services. Some are supplied by service providers, but many interviews are conducted with HfS subscribers and a focused exercise to interview 300 IT services decision makers across the Global 2000 Enterprises

- **Sell-Side Executive Briefings:** Structured discussions with service providers are intended to collect data necessary to evaluate their innovation, execution and market share, and deal counts.

- **HfS “State of Outsourcing” Survey:** The industry’s largest quantitative survey, conducted with the support of KPMG, covering the views, intentions, and dynamics of 1,000 buyers, providers, and influencers of outsourcing.

- **Publicly Available Information:** Financial data, website information, presentations given by senior executives, and other marketing collateral were evaluated.

Service Providers included:

- Infosys
- HCL
- Atos
- accenture
- UNISYS
- virtusa
- Capgemini
- Cognizant
- DXC.technology
- NTT DATA
- wipro
- Fujitsu
- TECH MAHINDRA
- GENPACT
- TATA CONSULTANCY SERVICES
- IBM
- CGI
- Microsoft
- Google
- HEXAWARE
- amazon web services™
Key Factors Driving the HfS Blueprint

### EVALUATION CRITERIA

Two major factors:

- **Execution** represents service providers’ ability to deliver services. It includes:
  - Solutions in the real world
  - Quality of customer relationships
  - Market share

- **Innovation** represents service providers’ ability to improve services. It includes:
  - Concrete plans to deliver value beyond cost
  - Experience delivering industry-specific solutions
  - Partnership strategy
  - Investment in proprietary technologies

### CRITERIA WEIGHTING

Criteria are weighed by crowdsourcing weightings from the four groups that matter most:

- Enterprise Buyers [$5B+] (20%)
- Buyers (20%)
- Service Providers (30%)
- HfS Research Analysts Team (20%)
- Advisors, Consultants, and Industry Stakeholders (10%)

Weightings were adjusted for this report based on outcome from HfS’ January 2017 State of Operations Survey and our March 2017 State of IT Services Survey
**Infrastructure Management and Enterprise Cloud Focus and Weighting**

This blueprint examines the broad infrastructure management services market, focusing on ability to provide modern end-to-end infrastructure management that enables IT staff to deliver IT-as-a-Service. The focus is on quality of service delivery and the ability to transform legacy and enable IT to deliver innovation.

### EXECUTION

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceived quality of services</td>
<td>25%</td>
</tr>
<tr>
<td>Breadth of infrastructure offerings</td>
<td>25%</td>
</tr>
<tr>
<td>Transformation capabilities</td>
<td>10%</td>
</tr>
<tr>
<td>Partnerships (cloud and platform)</td>
<td>10%</td>
</tr>
<tr>
<td>IP and reusable assets</td>
<td>10%</td>
</tr>
<tr>
<td>Use of automation</td>
<td>10%</td>
</tr>
<tr>
<td>Geographic footprint and scale</td>
<td>10%</td>
</tr>
</tbody>
</table>

### INNOVATION

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceived view of infrastructure innovation</td>
<td>25%</td>
</tr>
<tr>
<td>Concrete plans for improvement and infrastructure roadmap</td>
<td>15%</td>
</tr>
<tr>
<td>Cloud strategy: private, public, hybrid, investment in platforms (cloud, hybrid, SDDC)</td>
<td>15%</td>
</tr>
<tr>
<td>Investment in automation</td>
<td>15%</td>
</tr>
<tr>
<td>Thought leadership</td>
<td>10%</td>
</tr>
<tr>
<td>Ecosystem approach</td>
<td>10%</td>
</tr>
<tr>
<td>Improvement methodologies</td>
<td>10%</td>
</tr>
</tbody>
</table>
Service Provider Analysis
Guide to the Blueprint Grid

To distinguish service providers that show competitive differentiation in a particular line of delivery with progress in realizing the As-a-Service Economy of business outcome-oriented, on-demand, talent + technology services, HfS awards these providers the As-a-Service Winner's Circle designation.

<table>
<thead>
<tr>
<th>Execution</th>
<th>Innovation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>As-a-Service Winner's Circle</strong></td>
<td>Collaborative relationships with clients, services executed with a combination of talent and technology as appropriate, and flexible arrangements.</td>
</tr>
<tr>
<td>Shows excellence recognized by clients in the Eight Ideals in both execution and innovation</td>
<td>Articulates vision and a “new way of thinking,” has recognizable investments in future capabilities and strong client feedback, and is driving new insights and models.</td>
</tr>
</tbody>
</table>

- **High Performers**
  - Demonstrate strong capabilities yet lack an innovative vision or momentum in execution against the vision
  - Execute some of the following areas with excellence: worthwhile relationships with clients, services executed with “green lights,” and flexibility when meeting clients’ needs.
  - Typically, describe a vision and plans to invest in future capabilities and partnerships for As-a-Service and illustrate an ability to leverage digital technologies or develop new insights with clients.

- **High Potentials**
  - Demonstrate vision and strategy but have yet to gain momentum in the execution of it
  - Early results and proof points from examples in new service areas or innovative service models, yet lack scale, broad impact, and momentum in the capability under review.
  - Well-plotted strategy and thought leadership, showcased use of newer technologies or roadmap, and talent development plans.

- **Execution Powerhouses**
  - Demonstrate solid, reliable execution, but have yet to show significant innovation or vision
  - Evidence of operational excellence; however, still more of a directive engagement between a service provider and its clients.
  - Less evident vision and investment in future-oriented capability, such as skills development, “intelligent operations,” or digital technologies.
HfS Blueprint Grid: Infrastructure Management Services and Enterprise Cloud 2017

- **Investing in Innovation to Change**
- **Excelling at Innovation and Execution**

**HIGH POTENTIALS**

**HIGH PERFORMERS**

- Virtusa Corporation
- Hexaware
- Syntel
- TechMahindra
- Genpact
- CGI

**AS-A-SERVICE WINNER’S CIRCLE**

- IBM
- Amazon
- Google
- Capgemini

**EXECUTION POWERHOUSES**

- Accenture
- HCL
- Fujitsu
- NTT DATA
- DXC
- TCS
- Unisys
- Wipro
- Atos

**Excerpt for Cognizant**

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# Major Service Provider Dynamics: Highlights

## Execution

### Account management:
Account management remains a crucial success factor for all providers, with most seeking to leverage technical and business expertise alongside traditional account management models.

### Partnership networks develop:
Firms seeking to offer clients best-in-class services are broadening and deepening strategic partnerships to accommodate clients outside of direct provider offering.

### Strategic partners reduce the need for proprietary technology and infrastructure:
Increasingly, vendors are drawing the focus away from their own data center capabilities and proprietary technologies in favor of brokering agreements with key partners that offer greater scale and flexibility.

### Consultancy-led engagements:
As firms seek to tailor services and solutions to specific business challenges, engagements take a more strategic approach. A large number of firms now seek to establish the parameters of engagements through consultancy before any services are deployed.

### Market consolidation:
There have been several large mergers and acquisitions in the IT services space over the past 12 months. Four of the top 10 providers have merged into two, alongside some considerable acquisitions to bolster the execution capabilities of firms.

## Innovation

### Vision:
Having a vision for where infrastructure services need to be in the future is integral to a firm’s ability to innovate offerings to meet current and future client needs.

### Infrastructure improvement plans:
Successful vendors have concrete plans for the improvements and developments necessary in the IMS space to continue offering high-value services.

### Automation at the center of improvement roadmap:
Almost all firms described how automation technologies would be the driving force for future offerings, enabling firms to pass efficiencies and cost-savings on to clients.

### Methodologies and frameworks used to validate quality:
An increased number of vendors are using methodologies and frameworks to improve services and validate quality to win new client deals.

### Transformation focus:
Providers are seeking to expand the relevance of IM Services to clients’ digital transformation activities. Consequently, a number of firms are becoming strategically selective of which services they offer.
## Major Service Provider Dynamics: Highlights

### Execution

- **Selective services:** Firms are focusing their capabilities and resources to become more selective in the services they offer. A significant number of businesses now turn down build-and-manage and lift-and-shift deals in favor of longer term transformation contracts.

- **Client-vendor partnerships:** The long-term needs of business clients depend upon building a symbiotic partnership with service providers. As a result, more providers are focusing on developing long-term and mutually beneficial relationships with clients.

- **Pricing models evolve:** Approaches to pricing are adapting to meet new client trends and priorities. More contracts focus on specific business outcomes, with some now measuring business metrics to gauge success rather than traditional IT metrics.

- **Investment in talent:** Firms are beginning to realize that the talent and skills they need to develop future services are likely to be in short supply. Some firms are already acting on this to ensure they have innovative talent-attraction initiatives in place.

### Innovation

- **Investment in innovation:** Firms are now committing significant resources to discover and develop new innovations. Investments range from large scale R&D labs and initiatives to incubation hubs for high-potential start-ups.

- **Thought leadership:** Increasingly, service providers are seeking to prove their capabilities and ability to innovate through thought leadership. This has allowed for some vendors to build a perception of deep business and industry expertise.

- **Automation is beginning to shift results from cost to improved service delivery:** Firms operating in the IMS are seeking to deploy and develop innovative automation technologies to improve service delivery – a distinct change in messaging from the core focus on cost reduction. Nevertheless, for the majority the focus remains on cost reduction.

- **Moving away from traditional deals:** Multiple firms are beginning to take a more selective approach to deals by turning down traditional IMS in favor of more transformation focused engagements. This may open up the market to some of the less selective firms as build and manage service are undoubtedly still required in some business.
## Major Service Provider Dynamics: Highlights

<table>
<thead>
<tr>
<th>Execution</th>
<th>Innovation</th>
</tr>
</thead>
</table>
| • **Service brokerage model increases**: Multiple firms are moving toward semi-impartial and fully-agnostic service brokerage models to enable clients to secure best-in-class services through them. Some firms will find this easier than others, particularly those who have invested considerable sums in building proprietary technologies.  
• **Breaking down siloed IT services**: It has become apparent that a broader industry trend is at play due to increasingly popular delivery models like DevOps and the more bullish cloudification of services. Increasingly, traditional IT Services are merging, particularly application development and management and infrastructure. New deals tend to encapsulate not only the development of applications but also their hosting.  
• **Drift toward full as-a-service enterprise cloud**: Born-in-the-cloud as-a-service firms are growing considerably and continue to grow market share. Most firms feature at least one, if not multiple, of the large cloud firms in the partner eco-system to ensure they have the scale necessary to meet fluctuating client demands. | • **Co-innovation practices**: More providers are seeking to leverage the value of their client partnership to develop innovative solutions that can then be industrialized and repeated. This is seen most readily in specific industries where providers will partner with a particular client to design a solution, which is then developed and replicated for other clients in the same industry.  
• **Incubation of start-ups**: More firms recognize that the route to some innovations is through incubating or supporting start-ups and then leveraging them to produce solutions for clients.  
• **Insight and research focus**: Many of the leading providers covered by this research have built operational research and insight units that feed developments and innovations in technology, process, and organization into their service delivery activities. This has enabled some firms to quickly respond to changing dynamics in the industry and, in some cases, break away from industry peers by innovating faster and to greater scale. |
Service Provider Profile
### Provider with strong infrastructure narrative recognized for innovation

**Blueprint Leading Highlights**

<table>
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<tr>
<th>Strengths</th>
<th>Challenges</th>
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<tbody>
<tr>
<td><strong>Next generation cloud and infrastructure services</strong>: Cognizant focuses on providing next generation infrastructure services by leveraging its Constantly Ready Infrastructure Framework, AI led intelligent automation, thereby establishing a strong digital foundation for applications and services to help them navigate the digital shift.</td>
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<td><strong>Trusted Provider</strong>: Cognizant has driven customer value and benefits by leveraging Cognizant’s deep vertical and industry domain expertise, trusted advisor status with 1300+ Global 2000 companies across geographies. Client references praise Cognizant for being adaptable, flexible and customer-focused driven by metrics and well documented processes.</td>
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<td><strong>Automation focus</strong>: The firm recognises the important evolutionary shift automation will bring to cloud and infrastructure services and seeks to leverage powerful automotive capabilities to drive higher quality and more consistent services at a competitive price point.</td>
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<td><strong>Innovator in the field</strong>: Cognizant is considered an innovator by clients as it seeks to build new processes, techniques, and technologies into its services to improve outcomes or reduce cost. The firm also has a pedigree for thought leadership, leveraging wider capabilities across the organisation to drive and design innovative services.</td>
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<tr>
<td><strong>Brand and market presence</strong>: Cognizant would benefit from building a clearer and more direct marketing program that truly represents the capabilities and expertise of the firm. Currently, the firm appears almost modest when compared to the programs of competitors, which may push the firm lower on the lists of potential clients.</td>
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<tr>
<td><strong>Focus on business problems</strong>: The firm has the assets and resources to deliver high-value cloud and infrastructure capabilities, however, the narrative needs to extend to specific business challenges that can be tackled by the firm.</td>
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</tbody>
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### Relevant Acquisitions / Partnerships

**Acquisitions since 2014:**
- Brilliant Service for Intelligent Products
- KIS Information Services
- Frontica Business Solutions
- KBACE Technologies
- Storebrand Baltic
- CNO Financial Group
- TriZetto Corp

**Partnerships:**
- **Cloud**: Microsoft, AWS, Google, Oracle and IBM Softlayer
- **Digital**: Microsoft
- **Data Center**: Dell-EMC, VMWare, HPE, Cisco, Hitachi
- **HyperConverged**: Nutanix, HPE, Dell-EMC, Cisco
- **Analytics**: Google, Splunk, eMite
- **Monitoring**: AppDynamics (Cisco), Dynatrace, Zenoss
- **Service Management**: ServiceNow, Cherwell, BMC
- **Automation**: Ayehu, Ansible, Arago, Chef, Docker, SaltStack
- **Virtualisation**: Citrix, Delphix
- **Containers**: Docker, Mesosphere
- **Cloud Tools**: Cloudscape, Cloudability, ATADATA, Cloud Endure

**Client Profile**

Cognizant serves most of the Fortune 500 companies and also a host of medium and small scale organizations from an array of industries and locations.

Key Clients Include:
- ACCO Brands
- Standard Life
- Future Group
- ABN AMRO
- New England Healthcare Exchange Network
- Wisconsin Physicians Service Insurance
- TMG Health
- Klöckner & Co

**Service Delivery Operations**

Total IMS FTEs ~ 27,000

Cognizant provides private and public cloud hosting services through a network of its own data centers and partner data centers. Cognizant has data centers in:
- USA
- UK
- Netherlands
- Germany

NextGen Cloud and Infrastructure Services are delivered through Phoenix, USA; Buenos Aires, Argentina; Budapest, Hungary; apart from traditional delivery centers. Further data center capacity and services can be secured through Cognizant’s extensive partner network.

**Proprietary Technologies**

- **SymphonyWorks**: A Digital Engagement platform that provides a unified dashboard for next generation workplace services.
- **iVA**: iVA is a Virtual Assistant bot that uses AI and integrates with different self-heal, self-help, and desktop management tools.
- **Cloud360**: Cognizant’s Cloud Orchestration and Governance Platform.
- **Smart Service desk using Think Automation**: Automating ticket creation and assignment by email parsing based on the keywords.
Recommendations
Service Provider Selection

Why this service provider? The top reasons clients we spoke to selected their service provider were:

- **Historical relationship:** This includes the enterprise working with the service provider on other projects, and also the stakeholder having worked with the service provider at a former enterprise. Some stakeholders actually swapped out a service provider in favor of one they had worked with in the past, in their current or former role.
- **Cultural alignment**
- **Impressive consulting skills:** Service providers who demonstrated clear understanding of the market and presented a detailed roadmap for clients during a consulting engagement were more likely to also be contracted for the implementation project.
- **Team check:** Clients asked to see the resumes of or interview the proposed project team before selecting the service provider. One client also asked all the service providers in the RFP stage to send resumes of the back-up team in case all of the initial team is redeployed.
- **Similar experience:** Clients were more likely to select a service provider who could provide similar case studies, in terms of technical, organizational, and business requirements.
- **Scale:** Global clients want to work with a global service provider with a strong delivery capability and brand.
- **Preferred provider:** Some clients were limited to select a service provider from their enterprise-defined preferred provider list.
- **Solution and service provider joint selection:** Several clients asked a service provider to present their preferred solution at the RFP stage. The client therefore did not separate solution selection from service provider selection.
Service Provider Strengths

The top strengths clients listed for their service provider included:

- **Team expertise**: Team members having technical and business expertise. Increasingly, clients place a greater value on providers that offer solutions to real business challenges. This has boosted the value of firms that have staff with both business and technical expertise.

- **Infrastructure and cloud experience**: Clients appreciate the expertise and ability of providers in the infrastructure and enterprise cloud space. The firms studied in this report all show a broad knowledge of the space and a keen willingness to innovate to ensure they deliver customers real business value.

- **Transparency**: As firms adopt automation technologies more broadly, and the knowledge of the impact this has on the cost of service delivery increases amongst clients, a drive for transparency has boosted relations between the two. Providers are becoming noticeably clearer about the benefits clients can expect over long-term engagements in which investment in automation from the provider is worthwhile. In many cases, commitments to efficiency and cost reduction are embedded in contracts.

- **Partnerships**: Partnerships and co-innovation in the infrastructure space have been recognised by some clients. Providers keen to establish longer-term symbiotic relationships with clients are now visibly investing in the future of the relationship, in some instances absorbing some of the risk of transformation activities beneficial to both parties. For example, overhauled and improved infrastructure reduces the cost of the provider to manage, which is then passed on to the client as reduced savings or improved efficiency.
Service Provider Challenges

- The top challenges clients listed for service providers included:
  - **Outcomes vs metrics:** Some firms are struggling with a shift to contracts that focus on outcomes over traditional metrics. This research has seen a greater drive to develop contract and pricing models that focus on the delivery of specific business outcomes over those which focus simply on the achievement of traditional SLAs.
  - **Context:** Designing solutions in a business context. As clients’ expectations shift to a business-outcomes approach, some firms have struggled with placing solutions in the necessary context. This is particularly true of traditional firms with extensive technical expertise, who lean towards their area of expertise over client preference.
  - **Legacy perception:** The perception of some firms as legacy providers is a distinct challenge as the market moves towards digital transformation activities. Building consistent messaging and branding that breaks this perception will require both time and resources in considerable volumes.
  - **Attracting talent:** Increasingly, service providers are realising that the success of their firms is dependent on the talent they are able to attract. However, this places a challenge on firms as the demand for specific skills increases past the capacity of the labour market. Firms will have to invest and innovate to ensure they get the talent they need to drive services forward.
Recommendations: Enterprise Buyers

- **Seek to address internal talent deficits:** Many providers in this report advised that talent deficits in client organisations were limiting the success of engagements. Identifying key skill gaps internally and leveraging the expertise of the provider to upskill staff will ensure the value delivered by engagements is not unnecessarily inhibited.

- **Frame agreements in a business context:** Traditionally, engagements focused on the consumption of time and materials. The new digital business environment calls for a different approach. Buyers should outline which business outcomes they are seeking to achieve and wrap metrics around these that translate into the provider’s understanding.

- **Access and evaluate innovations on business value:** Digital transformation is not simply about integrating the latest technologies into the business. Buyers must work with providers to evaluate new technologies based on their suitability to their unique business environment.

- **Leverage and upscale to partnerships:** Although not suitable for all engagements, buyers should consider opportunities for co-innovation and co-ideation with providers to build stronger relationships and boost the returns of engagements. Mutual investment to ensure specific outcomes that deliver value to both parties should be investigated when possible.
Recommendations: Enterprise Buyers (Continued)

- **Develop funds and resources for innovation:** While the infrastructure and enterprise cloud market is mature, the integration of new technologies to develop it further will require funds and resources on both the buyer side and the provider side. Building a fund and setting out its remit will ensure that new innovations that can offer real business value will receive the scrutiny and, subsequently, the funding they deserve.

- **Seek to boost greater alignment:** Firms should focus on deploying strategic services that lead to better alignment across the business, not just in IT. Buyers should consider core IT services from a holistic perspective to ensure stakeholders and business units are greater aligned.

- **Consider the bigger picture of IT Services:** Increasingly, the lines between the distinct segments of the IT Services market are blurring. Infrastructure services are continuing to merge with application development and management. Even consultancy services are starting to be bundled into holistic IT services packages. Consider the value single engagements can bring when all pieces of the IT puzzle can be delivered in alignment.

- **Locate providers that deliver service brokerage capabilities:** The case for focusing on a single provider for IT Services is made more compelling by the move for many providers to become vendor-agnostic service brokers. This will allow clients seeking specific capabilities to select best-in-class solutions regardless of the overriding vendor engagement.
Recommendations: Enterprise Buyers (Continued)

- **Look beyond marketing:** If one thing has been made clear in this research, it is that marketing in the IT services space varies considerably. Until the situation improves, enterprise buyers should look beyond top-level marketing to get the bigger picture. This is best achieved through peer-to-peer engagements, focusing on buyer stories, or assessing the validity of a firm’s delivered outcomes.

- **Prepare for change:** Technology in the enterprise is moving at a swift pace, which means buyers of IT services need to look one step ahead to ensure infrastructure accommodates the current and future needs of the business. Locating a partner that will support, advise, and deliver in this time of change is essential for future business success.

- **Use Design Thinking to realign services:** Using the Design Thinking approach, buyers can work alongside providers to reimagine and realign IT services, particularly infrastructure services, to better meet their needs by moving the focus away from service delivery and into a business context that drives solutions for specific challenges and achievement of defined outcomes.

- **Procure services that meet customer experience needs:** In the modern business environment, employees do not see a clear differentiation between their experiences with enterprise technology and consumer technology. This blurring of expectations can lead to a peak in demand, which supply is unable to satisfy. Designing and procuring services that bridge this demand, such as next generation digital workplace solutions, will ensure IT infrastructure meets the experience expectations of enterprise users.
Recommendations: Service Providers

- **Build solutions to suit the wider business context:** Providers need to focus on providing solutions and services that address specific business challenges rather than seeking to deploy templated versions. Client expectations are changing, and they are becoming increasingly tech savvy.

- **Consultancy-focused engagements:** To better design services that meet client strategic outcomes, providers should initiate engagements with consultancy or advisory activities to truly understand the challenge and select the right solution out of the provider’s portfolio of services.

- **Focus automation activities on improving service delivery:** Automation technologies, particularly RPA, may be under the spotlight for business clients, but their core role in the IMS space is to improve and evolve service delivery. Providers should seek to leverage the power of this technology to boost the capacity and quality of their services.

- **Design and fund innovation activities:** The dynamic technology landscape brings innovative start-ups and companies into the ecosystem of large service providers. Firms should develop funds and resources to support, incubate, and acquire firms with high potential.

- **Seek to further integrate IT Services:** IT Services are becoming more intertwined and traditional silos are breaking down. Providers should seek to use this catalyst to further integrate IT Services and leverage the increased value of greater alignment and efficiency.
Recommendations: Service Providers

- **Develop talent attraction and retention programs:** The future of IT services is dependent on the talent firms can attract, train, and retain. Future predictions indicate a skills crunch as supply fails to meet demand. Providers need to be proactive and develop innovative talent attraction and retention programmes to ensure they have the skills necessary to deliver high-quality services.

- **Cross-skill technical talent with business, design, and strategy:** Clients are no longer focused just on technology and bringing in technical capabilities to support them. A broader range of skills are necessary, particularly design, business, and strategy to drive services and solutions that add real value to client businesses.

- **Evolve organisational models:** As IT services evolve, so must the delivery and organisational models of providers. To deliver digital transformation activities, providers must themselves be digitally credible. Evolving organisational and delivery models will ensure providers can meet client expectations in the new as-a-service economy.

- **Develop pricing models:** Similarly, providers must develop pricing models that reflect the changing dynamics of the marketplace. Consumption-based pricing may be suitable for some engagements, however, it is becoming increasingly old-fashioned in a market that is focused on the delivery of strategic business outcomes. Developing pricing models that package risk, reward the achievement of particular outcomes, and is measure by defined business metrics will ensure pricing meets the expectations of modern enterprise buyers.
Recommendations: Service Providers

- **Cross-skill across IT departments**: As traditional IT silos blur and breakdown, a new blend of skills and talent will be required to deliver them. Firms should start cross-skilling across IT departments to build the right skillsets up amongst service professionals and ensure the future of IT service delivery.

- **Break down silos**: IT is traditionally a hotbed for entrenched siloed services and this report has identified that remains the case for many providers. Many of these services are breaking down organically as clients procure across the IT spectrum. Nevertheless providers should actively invest time and resources into breaking down internal divisions to ensure clients receive seamless services across the organisation.

- **Marketing**: For many of the IT Service Providers analysed in this report, there were clear and noticeable disconnects between the firms’ capabilities and innovation and what clients could perceive. Firms need to become better equipped to market their services and successes to ensure current and future clients understand what their provider is capable of delivering. Addressing this disconnect is, for many firms, a top priority, as buyers stories and peer reviews of providers become increasingly popular and powerful.
Recommendations: Service Providers

- **Define a clear message:** Many of the firms captured in this piece have begun to move away from traditional infrastructure services in view of building a more holistic presence in the digital transformation space. However, many of them have not been able to distinguish their brand in the market and have invested little in terms of resources and time in setting out their company in a competitive market. Firms seeking to grow their presence in the market must ensure they have defined a clear message that provides potential clients with insight into their mission, vision, and activities.

- **Ensure activities support the narrative:** Conversely, some vendors have a clear and detailed narrative about their work in the industry but have relatively few examples of activities and client success. The mission to move clients towards a digital transformation is a valid one, but can get lost in translation if there are limited examples of this taking place. Firms must ensure their activities support the marketing narrative or they will lose credibility.

- **Design services that meet the needs of an increasingly consumer focus:** The expectations of enterprise customers are increasingly tied to their experiences in the consumer space. Providers should seek to meet this demand by focusing on customer experiences and replicating successes in the consumer space.
About the Authors
Phil is an acclaimed author, analyst, and visionary in IT Services and BPO, the Digital Transformation of enterprise operations and cognitive automation strategies. Fersht coined the terms "The As-a-Service Economy" and "Digital OneOffice", which describe HfS Research's vision for the future of global operations and the impact of cognitive automation and disruptive digital business models. Phil was named Analyst of the Year in 2016 (see link) for the third time by the Institute of Industry Analyst Relations, which voted on 170 other leading IT industry analysts.

Prior to founding HfS in 2010, Phil has held various analyst roles for Gartner (AMR) and IDC and was BPO Marketplace leader for Deloitte Consulting across the United States, UK, and Singapore. Over the past 20 years, Fersht has lived and worked in Europe, North-America, and Asia, where he has advised on hundreds of operations strategy, outsourcing, and global business services engagements.

Phil is also the author and creator of the most widely-read and acclaimed blog in the global services industry, entitled “Horses for Sources” now entering its eleventh year. He regularly contributes to media such as Wall St Journal, Business Week, Economist, The Times of India and CIO Magazine and is a regular keynote speaker at major industry events, such as NASSCOM, ANDI, ABSL, Global Sourcing Association, SSON, Sourcing Interests Group and HfS Summits.

He received a Bachelor of Science, with Honors, in European Business and Technology from Coventry University, UK and a Diplôme Universitaire de Technologie in Business and Technology from the University of Grenoble, France. He also has a diploma from the Market Research Society in the UK.
Jamie Snowdon

Chief Data Officer, HfS Research

Jamie Snowdon has primary responsibility for overseeing the development of HfS’ Quarterly Market Index, in addition to managing and developing the firm’s data-centric products and services. He works across the HfS analyst teams to define evolving services markets and create market size estimates and forecasts. He also manages HfS’ quantitative survey and benchmark data.

Jamie has over seventeen years experience in the IT and Business Services industry. In that time he has worked in a variety of roles including sales, marketing, consulting and as an industry analyst. Jamie’s analyst career has largely been spent conducting data analysis including market size/forecast models, quantitative/qualitative survey analysis and competitive analysis.

Prior to HfS, Jamie worked for UK-based analyst firm Nelson-Hall as a Research Director, conducting vendor and market analysis within the IT and Business Services community. Prior to Nelson-Hall, Jamie spent seven years at IDC, where he was the European consulting director for IDC’s services group, managing all of their bespoke research. Jamie specialised in delivering custom market forecast models and forecasting tools tailored to his client’s individual needs. In addition, Jamie ran IDC’s European outsourcing research, covering both IT and business process outsourcing. Jamie has wide industry knowledge covering IT consulting, enterprise applications, IT & business process outsourcing, desktop & network services, equipment maintenance, and business continuity.

Earlier in his analyst career, Jamie spent four and a half years at the IT services research specialist INPUT in a mixture of marketing and analysis roles. He left as the UK operations manager having spent two years as a customer services industry analyst. Jamie completed his graduate training at one of the UK’s leading electronic and IT distribution companies.

Jamie’s passion is learning; he holds university degrees in general science (computing), law and has a post graduate diploma in legal practice. He lives in Twickenham, London, with his wife and two daughters. His other loves include cycling, reading trashy sci-fi, cool technology, and the perfect pint.
Ollie O’Donoghue is a Senior Research Analyst with HfS, focusing on IT services.

With over five years experience in the IT services industry – as both a practitioner and a research analyst – Ollie understands the impact IT services have in the modern business environment.

Before joining HfS, Ollie was the Head of Research and an Industry Analyst for the Service Desk Institute (SDI), an organization committed to providing IT Service and Support Organisations with the resources to deliver greater business value. His time with SDI was used to develop a comprehensive research portfolio for the industry. He has researched and presented on a multitude of topics including automation, innovative support models, and real-time analytics. In 2017, Ollie was named second on a list of IT and ITSM experts to watch.

Before becoming an analyst, Ollie worked as an IT service professional in a large public sector organization. It was here that Ollie’s passion for the industry developed.

He graduated from the University of Kent with a Bachelor’s in History. He is also a certified Service Desk Manager with higher mastery. Among his eclectic collection of professional certifications, he has four advanced diplomas in ornamental aquatic fish care. He claims these landed him his first IT job as a member of the interview panel was an avid fishkeeper.

In his spare time, Ollie reads up on History, Geography, and Economics and spends an unfortunate amount of time playing strategy games on his computer. Ollie is partial to wheat beer and, in the right circumstances, Irish whiskey.
About HfS Research

HfS Research is The Services Research Company™—the leading analyst authority and global community for business operations and IT services. The firm helps organizations validate and improve their global operations with world-class research, benchmarking and peer networking. HfS Research was named "Independent Analyst Firm of the Year for 2016" by the Institute of Industry Analyst Relations which voted on 170 other leading analysts. HfS Chief Analyst, Phil Fersht, was named Analyst of the Year in 2016 for the third time.

HfS coined the terms "The As-a-Service Economy" and "OneOffice™", which describe HfS Research's vision for the future of global operations and the impact of cognitive automation and digital technologies. HfS' vision is centered on creating the digital customer experience and an intelligent, single office to enable and support it. HfS’ core mission is about helping clients achieve an integrated support operation that has the digital prowess to enable its organization to meet customer demand - as and when that demand happens. With specific practice areas focused on the Digitization of business processes and Design Thinking, Intelligent Automation and Outsourcing, HfS analysts apply industry knowledge in healthcare, life sciences, retail, manufacturing, energy, utilities, telecommunications and financial services to form a real viewpoint of the future of business operations.

HfS facilitates a thriving and dynamic global community which contributes to its research and stages several OneOffice™ Summits each year, bringing together senior service buyers, advisors, providers and technology suppliers in an intimate forum to develop collective recommendations for the industry and add depth to the firm’s research publications and analyst offerings.

Now in its tenth year of publication, HfS Research’s acclaimed blog Horses for Sources is the most widely read and trusted destination for unfettered collective insight, research and open debate about sourcing industry issues and developments.

HfS was named Analyst Firm of the Year for 2016, alongside Gartner and Forrester, by leading analyst observer InfluencerRelations.