IT SUPPLY CHAIN RESILIENCE

KEEPING THE LIGHTS ON IN THE AGE OF THE PANDEMIC

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TABLE OF CONTENTS

IT Supply Chain Resilience is a thought leadership whitepaper commissioned by Advania. It was produced by Radar during Q2 2020 and it is based on in-house research and customer insights covering the digital transformation of the Nordic market in combination with public domain data, frameworks, and other reference material.

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1 EXECUTIVE SUMMARY

Radar has investigated and analysed the impact of the pandemic on IT supply chains in relation to larger, ongoing structural changes to the IT ecosystem. The pandemic has accelerated underlying trends and put additional stress on both buyers and sellers trying to keep afloat. Apart from obvious damage to the industry, which cannot be ignored, there are nevertheless a number of positive trends coming out of this crisis. For IT buyers, a renewed focus on what we call "back-to-basics" will build more resilient IT organisations better equipped for future challenges. For IT vendors, achieving resilience will provide a platform for sustainable growth and new business. This is particularly true for local or regional vendors, who will be able to turn apparent challenges into advantages if handled correctly. Geopolitical headwinds, broken global supply chains, cybersecurity and compliance concerns, and the growing importance of trust are all factors that favour local or regional suppliers seeking to strengthen relationships or win new business.

For buyers of IT, Resilient IT will bring back sound practices that stimulate operational stability and risk mitigation. These would include:
- Proper management of business disruption and supply chain breakage
- Proper planning for business continuity, the Plan B
- Flexible adaption to business cycles, the ability to switch mode to "keeping the lights on"
- More advanced and more effective supplier management processes
- Shorter, tighter, more local supply chains with less exposure to international risk

Suppliers of IT that survive the pandemic will enjoy the same benefits. But they will also be able to leverage those experiences to strengthen their go-to-market and create new innovative services based on customer behaviour in the pandemic. Radar predicts a very healthy market outlook for stable, trusted suppliers that compete with quality of service and process excellence rather than pricing. We expect that two customer categories in the Nordics will be of particular interest:

- Customers "returning home": experienced outsourcing buyers looking for higher quality services, mitigation of global supply chain risk, or more honest and efficient pricing
- "Reluctant outsourcers": buyers with little or no experience of outsourcing, or buyers hitherto unable to find the right fit vendor, are now looking for stable partners and will be prepared to approach Resilient IT vendors

In this changing landscape, we predict that local and trusted vendors will have an advantage over global suppliers in the foreseeable future. Almost all of the external factors guiding outsourcing decisions are currently tilted towards "local" and "trusted".
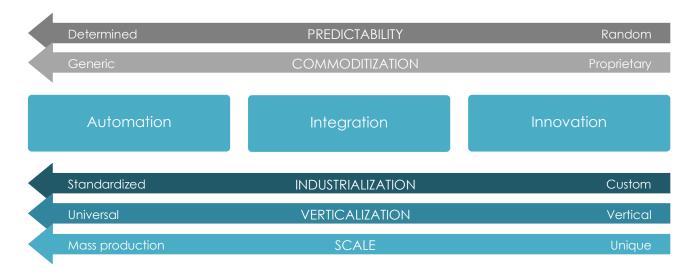
2 THE IT SUPPLY CHAIN FRAMEWORK

Supply chain management controls the flows of goods and services required by a business to produce value. The broad domain of information technology (excluding manufacturers of IT hardware and hardware-related logistics) has traditionally been more preoccupied by the concept of service management than supply chains. IT, on both sides of the isle of demand and supply, has typically organized itself by using practices adopted from advanced business services rather than manufacturing or logistics. Service management frameworks such as ITIL have been embraced while inspiration from manufacturing processes has been limited in scope and ambition. For example, Lean product development principles are sometimes used in software development but Lean production principles are rarely carried over to the other components in the IT delivery framework. Lately, however, the paradigms of supply chain management are resurfacing in IT, and they seem to be gaining relevance. There are three important reasons for this: *the industrialization of IT*; *the challenge to existing frameworks*; and the impact of the *current pandemic*.

2.1 INDUSTRIALIZATION OF IT

Radar first used the term of the industrialization of IT in 2017[1] to describe the current transformation of the IT industry. IT is now rapidly undergoing a series of process changes similar to the changes in manufacturing triggered by the second and third industrial revolutions. Automation, economies of scale, integration of complex systems and components, and rapid innovation are now disrupting traditional business models and our understanding of IT. IT leaders, in charge of IT vendors or IT departments, must manage the three forces of innovation, integration, and automation to stay relevant and deliver value to stakeholders.

The Industrialization of IT

As IT industrialization rolls on, current process frameworks based on legacy assumptions about IT are becoming obsolete. When IT turns industrial, process frameworks must follow the lead.
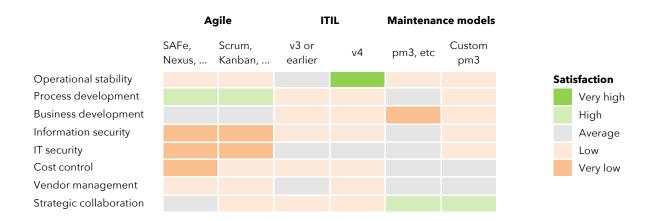
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[1] Radar: Den perfekta stormen: Industrialiseringen av IT, 2017.

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2.2 CHALLENGE TO EXISTING FRAMEWORKS

Subject to heavy pressure from industrial logic, existing frameworks are feeling the weight of a paradigm shift. Radar research[2] indicates that current commonly used IT governance and process models are delivering very poor returns on investments, perhaps even shockingly poor, given the time and investment spent on these mature models over an extended period of time. Measured by eight categories of business impact, the top six process frameworks used in the Nordics scored remarkably low across the board, with a few individual exceptions in certain categories. No framework received acceptable scores in all categories, and no category scored acceptably across all frameworks.

	Agile		ITIL		Maintenance models	
	SAFe, Nexus, …	Scrum, Kanban, …	v3 or earlier	v4	pm3, etc	Custom pm3
Operational stability	Low	Low	Average	Very high	Low	Low
Process development	High	High	Low	Low	Average	Low
Business development	Average	Average	Low	Low	Very low	Low
Information security	Very low	Very low	Average	Low	Average	Low
IT security	Very low	Very low	Average	Average	Average	Low
Cost control	Very low	Low	Low	Low	Average	Average
Vendor management	Low	Low	Low	Low	Average	Average
Strategic collaboration	Average	Low	Low	Low	High	High

Satisfaction
- Very high
- High
- Average
- Low
- Very low

2.3 IMPACT OF THE PANDEMIC

Persistent problems with process and governance frameworks are usually accentuated and reinforced by crises and as businesses started to lock down in the current pandemic a lot of noise was made about "broken supply chains". While only a few IT vendors and even fewer IT departments actually use supply chain management principles, this observation actually made a lot of sense from a conceptual perspective. A clear overview of the chain of production, the participating actors in the delivery of IT, managing risk in a comprehensive way, building the capacity to shift forms of delivery, and achieving business continuity have become talking points in an ongoing discussion across almost all business impacted by the Coronavirus. Supply chain concepts and principles are staging a late (but deserved) comeback in a new domain: IT.

[2] Radar Cybersecurity 2020.

3 "THE GREAT ACCELERATOR"

Towards the end of 2019 global macro indicators and Radar's own data revealed that the advanced economies were slowing down considerably and a number of worrying signs were pointing towards a coming recession[3], well in advance of the general spread of Covid-19 in Q1 2020. Michael Green of Logica Capital has correctly coined the Coronavirus pandemic "The Great Accelerator" because it is best understood as a catalyst of underlying longer-term trends, not as a disruptive black swan. A direct parallel can be drawn to the IT market, where factors impacting the larger economy were noticed some time before the IT supply chains were severely hit in 2020. Now, as we are entering Q3 2020 in the shade of the pandemic, IT buyers and vendors are facing a culmination of four major forces: geopolitics, cybersecurity & compliance, return on investments, and the Coronavirus pandemic. These factors apply whether IT is produced inhouse, externally, or, as in the majority of cases, by using a combination of inhouse and external sources. Combined, they challenge the status quo in IT supply chains.

3.1 GEOPOLITICS

In a relatively short period of time the pace of globalization has ground to a halt with significant impact on global supply chains. Purely economic calculations are no longer accepted as the fundamental basics of decisions: *where* and *who* are now crucial considerations. Concerns of national security, trade balance, trading blocks, property rights, and international alliances have become paramount. In the IT production system, every item and every layer are now under scrutiny, whether hardware, software, communication protocols, or outsourcing partners. The current international row over 5G standards and equipment is a stark indicator of things to come. In the IT supply chain, sourcing decisions have become restrained by geography and national security to an extent which was difficult to foresee 10 or even 5 years ago. The issue of **trust** is now seriously challenging the presumption of comparative advantage when buyers scan the vendor landscape. Government interference in trade and support to local business is on the rise, too, using sticks and carrots to promote national or "friends & allies" business and punishing enterprise from the perceived adversary. Again, Huawei makes a case in point: all vendors, regardless of jurisdiction, operating supply chains that include Huawei components run the risk of US sanctions. Current geopolitical conditions without a doubt favour **local** and **trusted** suppliers, tech, solutions, and human resources.

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[3] Radar: Den perfekta stormen del V, 2020.

3.2 CYBERSECURITY & COMPLIANCE

Closely related to the issue of geopolitics we find the growing concern with cybersecurity and compliance. In 2020, 35% of IT decision-makers in the Nordics rated Cybersecurity & Compliance a top priority, and it was ranked 3rd among top ten management challenges.[4] Although internal threats (79%) and organized crime (73%) are viewed as the principal sources of risk, 54% of respondents perceived a future threat level increase from "state sponsored espionage or sabotage", which ties in well with the geopolitical angle.

Compliance concerns also continue to cast a long shadow on the IT supply chain. A majority of decision-makers in 2020 still view regulatory compliance as a significant obstacle to Cloud services adoption,[5] and there is reason to believe that those reservations spill over into sourcing decisions for other components in the sourcing architecture, not just Cloud services. Such reservations are further underscored by government agency inertia, which seems to suggest a slow but definite march towards strengthened national jurisdiction on data. Swedish government expert groups have in recent years repeatedly issued guidelines on the highly restricted use of data storage on foreign soil,[6] in particular for the management of classified information by government agencies, where Cloud storage is for all intents and purposes prohibited.

Cybersecurity and compliance are fundamental, complex factors with significant implications for the IT supply chain and the establishment of trusted partnerships between suppliers and buyers.

3.3 IT INFRASTRUCTURE ROI CONCERNS

In 2019, Radar began to notice growing complaints from IT buyers about higher IT infrastructure costs. In particular, expected savings or efficiencies from Cloud services were not being delivered as promised. Data supports that costs of IT Operations indeed are rising, and Infrastructure services are increasing their share of total IT spend against Applications and End User services.[7] Part of these rising costs may be explained by increasing volumes. But the cost trend goes against annual price erosion levels of 10-15% and efficiencies in automation and scale. Instead, it would suggest that the supply of IT infrastructure services is not optimized and that returns on investments in the current supply chain model are diminishing. Automation and scale has driven down unit cost, but serious questions are posed about efficiency in the current dominant business model driven by global gigascale vendors.

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[4] IT-Radar 2020.

[5] Ibid.

[6] https://esamverka.se/stod-och-vagledning/rattsliga-uttalanden/rojande-och-molntjanster.html

[7] IT-Radar 2020.

3.4 THE PANDEMIC

Viewed in tandem, the outbreak of the Coronavirus has accelerated the three trends outlined above. A tighter scrutiny of costs, and in particular cash flow in the current recession, raises pressing questions about actual levels of spend on infrastructure services and IT operations. Business continuity plans and other business critical process issues are brought to the surface when workplaces lock down and the majority of the workforce connects from outside the corporate LAN, which of course add to underlying concerns of cybersecurity and compliance. Geography and politics become deciding factors when countries lock down in different phases and perceived geopolitical challenges to the supply chain suddenly become very real. "Local" versus "offshore" and "commodity provider" versus "strategic partner" have very different meanings in 2020 than they did just a year ago.

IT Supply Chain Challenges in 2020

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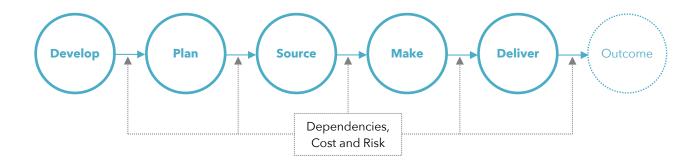
4 THE WAY FORWARD

Crises, if handled well, provide much knowledge and experience to build a better, more resilient operational model that can provide a platform for sustainable business growth. Organizations would do well by drawing upon the unique experiences of the pandemic and the opportunity to stick with new good business practices while seizing the moment to get rid of dead wood. IT vendors and IT departments should turn the negative effects of the pandemic into positive, constructive actions that support survival and growth of the core business. The way forward includes *a reassessment of established frameworks*; a revival of *best practices and good governance*; and going *back to basics* when it comes to the IT supply chain and the delivery of digital business.

4.1 IT BUYERS

Good supply chain process insight will guide decisions based on reassessment of established frameworks and associated good practices and governance. "Back to basics" means answering a few simple questions about your current operating model and the process framework that is supposed to support it.

- Do you have advanced risk management methodology in place that includes mitigation of supply chain breakage and business disruption?
- Is there a Plan B? Is there a business continuity / disaster recovery plan available, one that actually works?
- Can you switch operational modes, from business as usual to keeping the lights on, protecting cash flow and business critical operations, without major difficulties?
- Are your supply chains (your sourcing architecture) hardened to mitigate risk, properly mapped, identifying key components, costs, suppliers, dependencies, geography, distribution to customers, and outcomes?

The Back-to-Basics Supply Chain

4.2 IT VENDORS: NEW HIGH MARGIN BUSINESS

Vendors, once they have secured their own business continuity, face a unique business opportunity in the wake of the Coronavirus pandemic which is related to process maturity and excellence displayed during the crisis. Vendors typically display significantly higher IT process maturity than their customers (this is partly what the customer is paying for) and this would be particularly true for vendors that provide business-critical services such as infrastructure services in certified environments or enterprise managed services.

This category of IT service providers now can go to market with an added layer of value derived from the survival of the pandemic--- "resilient IT". Local or regional vendors enjoy further advantages by removing some of the risks that were accentuated by the pandemic, namely geopolitical issues, arrhythmic lockdowns, and regulatory compliance concerns. Local vendors are also riding a wave of higher customer satisfaction scores than global competitors. During the past three years, no offshore vendor has reached the top 5 in any category in Radar's Nordic customer satisfaction surveys.[8]

IT resilience now offers a number of possible new business opportunities for the local vendor, for example:

- it acts as a seal of quality and builds brand equity
- it offers possibilities to promote IT Hardening or Resilience conversion projects
- it provides a platform for IT department process re-engineering projects
- it provides a blueprint for business continuity planning and Enterprise Risk projects

Customers in pre-pandemic times typically sourced such projects from management consultancies, but in the current business climate practical experience counts for a lot more than a long trail of paper exercises. These projects are high margin and high-profile assignments. Winning such business would open up previously unchartered territory for many infrastructure services or managed services providers and gives a chance to further build brand equity, in a virtuous circle, coming out alive and kicking from the shadow of the pandemic.

4.3 IT VENDORS: INNOVATIVE OR CUSTOMISED SERVICES

When quarantine restrictions were introduced in New York, video conferencing instantly spiked 350%[9] while streaming video content consumption rose up to 40% in March in European countries[10]. Zoom saw a weekly revenue rise of more than 3000%[11] (yes, three thousand percent) during seven consecutive weeks in Q2 2002. Work-from-home and self-isolation has driven data usage and generated demand for storage and CPU capacity, for professional as well as personal use. Employers have been struggling with spikes in remote consumption of enterprise data contained in a legacy architecture originally designed to harbour more than 50% of network traffic inside the LAN. Much of this behavioural change in the consumption of IT services is predicted to be *permanent*, not temporary.

Meanwhile, not all businesses and industry segments have been adversely affected by the pandemic. Healthcare report healthy revenue growth in all subsegments but particularly in highly regulated areas such as pharmaceuticals, clinical trial management, emergency services, and inpatient care. All of which drive Compliant storage, compute and application services. Digital

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[8] Radar Leverantörskvalitet 2018, 2019, 2020.
[9] https://www.statista.com/statistics/1107559/video-streaming-consumption-growth-worldwide-coronavirus/
[10] https://www.bluejeans.com/blog/video-conferencing-usage-during-coronavirus-outbreak
[11] Goldman Sachs Global Investment Research

retailers, too, are reporting record revenues and is the single most important industry segment for datacenter providers. This surge in demand from certain verticals is not expected to slow down until 2022, at the very earliest.

For IT vendors offering datacenter and infrastructure services there is a golden opportunity, now, to win new business or capture market share if they play their hand right. There are open spaces both in traditional services and in customised or innovative new products.
The go-to-market should be tailored to customer demand and play to vendor strengths.

4.3.1   CUSTOMER DEMAND IN THE SWEET SPOT IS CHARACTERISED BY:

- High demand for Regulatory Compliant services (application management etc) and products (storage, certified environments, etc)
- High demand for Cybersecure environments and services
- High demand for hyperscale to meet streaming content and related products, digital retail, Big Data, etc
- But also high demand for hybrid secure bridging platforms between customer LAN and the Cloud
- High demand for solutions that do not require customer CAPEX spending, to offset weak cash flows in many industries

4.3.2   VENDOR STRONG POINTS INCLUDE:

- Local/regional presence and jurisdiction to offset regulatory concerns
- Local/regional presence to offset geopolitical and geo-pandemic fluctuations
- Local/regional/cultural proximity to build trust and psychological bonds in testing times
- High process maturity, operational excellence
- Secure and/or certified environments and processes tailored to Private Sector needs
- Secure and certified environments and services tailored to Public Sector needs and Public Procurement legal framework
- Experience of business continuity in the pandemic
- Flexible and innovative services tailored to behavioural change in the pandemic
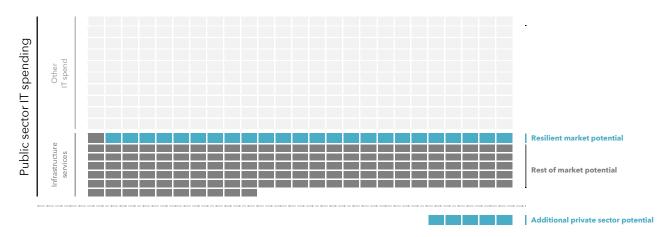
5 MARKET POTENTIAL

The market potential for post-pandemic resilient IT is difficult to precisely calculate but substantial by any estimate. It includes two significant categories of customers who are either experienced in offshore or multi-shore outsourcing but switching to local/regional suppliers (customers "returning home") or customers who are less mature and/or more skeptical about outsourcing for a number of reasons ("the reluctant outsourcers").

The first category would typically be represented by private sector organizations with high expectations on quality of service (including Regulatory Compliance) or efficiency (pricing and performance). The second category typical candidate is a public sector organization who is reluctant to outsource either because of little or bad experience of outsourcing, or one that hasn't been able to find a fit for specific regulatory requirements such as jurisdiction, vendor certified environments, security vetted vendor staff, etc.

5.1 RISK EXPOSURE AND MARKET MOVEMENTS

Some estimates and projections can be made based upon Radar's data for the Nordics and in particular Sweden. The Swedish public sector spends about 41 BN SEK on IT in 2020, of which some 39% (16 BN SEK) is spent on infrastructure-related services.[12] This segment is dogged by relatively low process maturity in outsourcing and a significant part of the infrastructure spend goes towards inhouse or hybrid solutions that are not optimized. Current customers of "pure" outsourcing also report low levels of satisfaction with suppliers and services. A common theme for IT buyers in the Swedish public service is that the market cannot meet demand for regulatory compliant services, and/or that good vendors get stuck in public procurement processes that promote Size & Price over quality.

A conservative estimate for the 16 BN SEK spend would be that at least 15% is ripe for capture by resilient local IT vendors, either by attracting first-time buyers or by convincing dissatisfied customers to switch. This would represent unexplored market territory worth some 2,4 BN SEK annually. Added to that, there is unexplored territory in the private sector too. Looking at highly regulated verticals like Utilities, Healthcare, and Finance & Insurance the total spend on infrastructure services is about 9 BN SEK. A conservative conversion rate of 5% (from inhouse or offshore production to local/regional Resilient vendors) would add another 450 MSEK to the basket.

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[12] IT-Radar 2020.

5.2 CUSTOMERS RETURNING HOME

There is a small but growing group of customers who are shunning global offshore vendors in favour of local or regional vendors. This group is characterized by fairly high maturity and long experience of outsourcing through multi-contract-cycles and it is motivated to "return home" for three principal reasons: **risk**, **quality** and **price** (price efficiency). This group of customers returning home would probably be larger if there were vendors of scale available on the Nordic market. The size fit makes it practically impossible for a certain class of major Nordic multinationals to pick true Nordic IT suppliers, even if they wanted to.

5.2.1 RISK EXPOSURE

Customers shunning global outsourcing due to risk exposure are typically enterprise class businesses with multinational operations. A number of them are already relocating manufacturing supply chains from territories under sanctions (like China), but vulnerable IT services are also subject to relocation. Some buyers have been forced to make rapid decisions when critical business processes were interrupted in lockdown countries.

> "*During the pandemic, some of our IT services and BPO:s were completely shut down in certain countries. You can imagine the damage to revenue and brand. Force majeur clauses made it difficult to recover lost revenue. We are now scrutinizing every link in our processes and we will shorten supply chains [by returning to Nordic suppliers]*"
>
> CIO, Nordic financial services,
> >1 BN MSEK IT Spend

5.2.2 QUALITY

In the "quality" category, we find buyers who have tried offshore outsourcing and are skeptical of the value for money in global scale deals. Typically, they are in the 4th or 5th cycle of outsourcing and have decided to build a stronger partnership with a local or regional supplier. The relationship is based primarily on process excellence. Fixed and variable costs are higher than those offered by global vendors, but customer outcome and satisfaction scores are significantly higher than average.

> "*We have tried offshoring in different phases with different experiences. Regional works, Global doesn't. For infrastructure, we need PCI DSS environments and we prefer local, mature suppliers. I'm not sure about a global partner for core data processes. We have enough concerns about cybersecurity and operational risk as things stand today.*"
>
> CTO, Swedish financial services,
> >500 MSEK IT Spend

5.2.3 PRICE

The price category is a collective of buyers that are disappointed with growing costs that were not budgeted for when agreements were signed. They may be hidden costs--- not known by the buyer at the time--- or unrealized savings promised by the provider. Typically, these customers feel that their supplier does not control costs on behalf of the customer, whether these costs are incurred by the supplier or by the supplier's partners (such as Cloud services providers).

> "Returns on our Cloud investments have been disappointing. Unit costs are down but volumes and licenses have mushroomed with no proactivity from our global supplier. We need a local partner that can guide us through our infrastructure transformation. Somebody who looks after our interests."
>
> CIO, Swedish manufacturer,
> >100 MSEK IT Spend

5.3 THE RELUCTANT OUTSOURCERS

Reluctant outsourcers are distinguished by having serious doubts about outsourcing, either because they have real or imagined concerns about possible risks involved for their organization (the "immature" buyers), or because they have real concerns about actual risks involved that may threaten the license to operate or cause serious damage to the business (the "compliant" buyers).

5.3.1 IMMATURE BUYERS

The immature buyers have concerns that principally stem from the perceived internal capacity to manage outsourcing. If you look closely, they are in fact less worried about the supplier than their own organization in a future relationship where they may be dominated or let down by an external partner. Also, because they have little or no experience of outsourcing of business critical functions, issues of transition and transformation are very important. These buyers would need trust and guidance before signing on to significant outsourcing and digital transformation.

> "Digital transformation and automation is fine in theory but who will guide us? I can't attract or afford to recruit all the expertise necessary. It's a big jump and I would prefer a local bridge before jumping."
>
> CIO, Swedish professional service,
> >30 MSEK IT Spend

5.3.2 COMPLIANT BUYERS

The "compliant" buyers have significantly higher and more precisely defined demands than any other group of customers, but they are also less sensitive to price than anybody else. CIO:s in regulated industries are under heavy pressure to deliver compliant and secure IT services that keeps their business in operation. Price is a much smaller worry. Process excellence is paramount for vendors who want to win business here: expect subjection to regulatory regimes such as quality systems (ISO etc), cybersecurity frameworks, financial services certifications (PCI DSS etc), and other government or agency regulations.

> "*Cloud services and offshoring are completely off the table in our case. We can't even upgrade from Skype to Teams because we need to retain the AD on prem, for regulatory reasons. Outsourcing would be possible but the vendor needs to be local and fully regulatory compliant.*"
>
> CIO, Swedish public infrastructure,
> >600 MSEK IT Spend

> "*Our IT infrastructure is extremely sensitive and governed by national security legislation. An external provider, if they exist, would need to be staffed by vetted Swedish citizens and all tech and processes would be subject to strict formal procedures. We haven't been able to find that provider, or they aren't interested in us.*"
>
> CIO, Swedish utility,
> >1 BN SEK IT Spend

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6 CONCLUSIONS

The current pandemic has accelerated underlying trends related to IT resilience and brought back into light basic concepts about supply chains and operational risk. Geopolitical and other factors had already put pressure on supply chains before the pandemic outbreak. But lockdowns and a sudden crash in the economy forced businesses and public sector organisations to switch into emergency mode. Some businesses went bankrupt, others are still surviving, a few are thriving. IT organisations that kept the lights on during the pandemic, whether buyers or sellers, share a trait in that they are now able to build for the future on a more stable foundation. In popular language, they have achieved the state of "Resilient IT".

Resilience for IT departments and other IT functions on the demand side in many ways signifies a return to the basics. It lends emphasis to back-to-basics concepts such as the IT supply chain, strict controls on costs, enterprise risk management, good governance, planning for business continuity, and making sure there is a Plan B when things go south. Resilience for IT vendors on the other hand means all of the above, but it also opens up exciting new opportunities for business, particularly for a certain type of vendors. Local vendors with high process maturity are especially well positioned to take advantage of a changing business climate as we exit the pandemic. As things stand, the IT supply chain is favouring local, trusted suppliers that can mitigate geopolitical, pandemic, regulatory, cybersecurity, and liquidity risks. Customers will in the foreseeable future value operational stability and trusted partnership more than comparative advantages. Local is back, and it is looking better than ever.

About Radar

Radar is the leading fact-based provider of insight for the Nordic IT industry and the IT decision makers.

Through unique ecosystem coverage Radar provides analysis and insight to service- and technology suppliers, IT decision makers and institutional investors in the Nordic IT sector.

Radar was founded in 2006 with the idea of facts creating a better decision foundation for all parties within the IT-ecosystem. The company is specialised on the IT-ecosystem and is working for IT-providers as well as IT-departments amongst other parties within the IT-ecosystem.

Today Radar orchestrates data flows and is delivering value to our customers through models and recommendations in real time as well as through the company's experienced advisors. The value for our customers is made available through the Nordic market's most used subscription based service for a 360-degree IT decision-making support and through market leading experts in fact based advice.

What we do

Radar is leading the market in orchestrating different types of local and global data flows through our own developed models as well as delivering in depth analysis as fact-based recommendations to all parties in the IT-ecosystem. The company builds its business on three main pillars.

Data based research which is collected through a value network which relies on the party leaving data in return for receiving fact-based advice.

An ecosystem that builds value networks through data models and a meeting place for key IT individuals.

Trustworthy advice built on local data as well as expertise within IT-strategic areas for CIOs and providers and other parties within the IT-ecosystem.

Services

Radar offers services to all parties within the IT-ecosystem. The services are built around three main categories: Research – When giving Radar data one gets advice back. Ecosystem – Radar's models are used within the organisation to increase company competitiveness or through the activation of a value driven relationship network of relevant individuals within the IT-ecosystem. Advice – Radar's experts in strategy, benchmarks, evaluations and sourcing delivers customer unique reports and evaluations.

Radar offers the most insightful data and advise to empower suppliers on the local Nordic market. Radar has deep knowledge in values, growth and conditions on the local IT market, customer preferences, trends as well as local competition.

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