ISG Provider Lens™

Public Cloud - Solutions & Services

Managed Public Cloud Services for Midmarket

Nordics 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Tech Mahindra

November 2020

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2020 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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ISG Provider Lens™

ISG Provider Lens™

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EXECUTIVE SUMMARY

Public cloud spending continues to surge in Nordic enterprises in the coming years as demand for computing and Agile cloud-native technologies drive growth and enterprises' ambition to expand their businesses globally. The market is driven by companies' digital transformation initiatives and the need for more Agile IT delivery, which calls for infrastructure modernization and the use of next-generation cloud technologies such as containerization, cloud-native applications, microservices, artificial intelligence (AI) and machine learning (ML).

Enterprises expect that system integrators will have matured cloud services capabilities in their portfolio. Public cloud demand in the Nordics is driven by an interest in productivity gains and efficiency enhancements, more available solutions, and the transformation of customer engagement and experiences. Software-as-a-service (SaaS) spending continues to propel the market, especially with the advancements in device and data management and analytics. The AI market is boosted by substantially expanding adoption as enterprise clients strive to optimize and improve processes through AI-enabled automation.

Public cloud services have become mainstream solution in the Nordic market: The Nordic IT market has always been one of the most progressive markets in Europe. Although many large organizations continue to run their applications in a legacy operation model, there is substantial growth over the last two years in the number of companies that are taking a more standardized digitization approach. This shift has increased the cloud spending of enterprise clients and SMBs, across all industries, on adopting public cloud services. Sweden, which is well diversified in manufacturing and exports a majority of its output, spends much more of its IT budget on research and development (R&D) than its neighboring Nordic countries. Denmark, Finland and Norway have a great focus on the food and beverages and oil and gas sectors. Overall, Nordic enterprise IT spending has increased, especially spending on public cloud, cloud-native and the transformation of exiting IT infrastructure.

Finance, manufacturing and retail have shown a surge in public cloud services consumption: The public sector has shown positive growth in its average strategic cloud maturity, but it continues to report low strategic and operational maturity from a public cloud perspective. The main factor behind the comparatively low scores has been the lack of in-house capabilities and expertise. In the private sector, financial services, with its long history of IT-driven services, leads the way. Information processing and the need for information classification helps it address the "what" and "where" of cloud services. In the last couple of years, the manufacturing sector has seen the largest compound annual growth rate in both strategic and operational maturity. It has shown a surge in cloud adoption as IT has become a strategic necessity for business growth and manufacturing processes are becoming increasingly digital. Integrating manufacturing execution systems with Internet of Things (IoT) technology creates the need for processing large quantities of data while creating new possibilities for cost savings and increased efficiency. Cloud services are seen as enablers in this change and many surrounding areas, and ISG expects that the overall growth in Nordic cloud maturity will continue to increase adoption with substantial pace.

System integrators and hyperscalers strategic announcement: With CXOs focusing on IT outsourcing engagements and, in particular, the spending and digital innovation aspects of these engagements, it is extremely important for IT service providers to become joint investment partners with Nordic enterprises in outcome-based engagements. It is essential that providers get certified and achieve greater competencies from AWS, Azure and GCP. Over the last few quarters, the Nordics born, and global system integrators have increased their overall cloud accreditation.

Integrated, cognitive, intuitive, AI-led cloud management platform: As many Nordic enterprises embark on a multi-cloud journey, they are seeking various ways to manage the multi-cloud workload and ensure that cost and governance are in place. To address the need of enterprises, IT services providers have built their own intellectual property (IP), cloud management platform (CMP), and numerous accelerators and frameworks. Most of the CMPs that are either developed or offered are cloud-agnostic and a vendor-neutral platform. They have a robust security layer overarching all the features and services provided. IT service providers are offering CMP as a part of bundled solution, with a very few of them selling it as a standalone product. We believe that this segment will continue to mature from the one-point governance and finance front.

Nordic CXOs prioritize innovation and transformation: To ensure that the business derives maximum value from IT investments, innovation and transformation are becoming increasingly important. Across the Nordic region, including both enterprises and public sector entities, there is a pressure to lower traditional IT outsourcing. Capital is being spent consciously on the core business systems from a transformation and digitization front. This has resulted in a multi-cloud journey that can include cloud adoption, migration and transformation. Nordic clients are consuming their services from the three big public cloud providers — AWS, Microsoft Azure and Google Cloud Platform (GCP) —based on the solution and multi-year strategy defined by the offices of the chief technology officer (CTO) and the chief information officer (CIO). To address the need of Nordic enterprises and the public sector, AWS, Azure and GCP have already committed to the Nordic market by setting up availability zones, enabling SMBs and enterprises to build cloud-native solutions.

Substantial adoption of SAP HANA infrastructure services: SAP HANA cloud infrastructure services have shown a reasonable surge. Nordic enterprise clients are not moving their SAP HANA workload to cloud infrastructure, due to numerous data sovereignty and security concern. The pandemic has brought the attention of CXOs back to cost reduction and workload optimization. However, banking, finance and retail clients have started moving SAP HANA workloads to public cloud infrastructure in a proof-of-concept model. The growth in SAP HANA deployment on public cloud is subject to how the global and Nordic markets react to COVID -19 business slowdown.

Introduction

Simplified illustration

Public Cloud – Solutions and Services 2020	
Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket
Governance, Risk and Compliance Services	Managed Public Cloud Services for large Accounts
Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services
Hyperscale Infrastructure and Platform Services	

Source: ISG 2020

Definition

The growth in public cloud adoption among enterprises and the maturity of the cloud industry are creating a major impact on both enterprises and IT service providers and on business models, requiring increased acceptance of digital initiatives and creating risks of obsolescence. Considering the widespread adoption of the as-a-service model, enterprises need to continuously evaluate cloud services and IT providers globally. ISG reports that the strong demand for digital transformation is driving global contracts for cloud products and services, including infrastructure as a service (IaaS) and platform as a service (PaaS). According to the latest 1Q20 ISG Index™, the global market has grown 7 percent in combined market annual contract value (ACV) since Q4 2019 to reach its current value of $14.8 billion. In the same period, as-a-service ACV has increased by 11 percent to reach $7.9 billion. Also, the IaaS market grew 18 percent to $5.9 billion and the SaaS market dropped by 4 percent to $2 billion. The growth in numbers in the as-a-service area indicates the shift to and preference for digital technologies to reduce costs, increase productivity, improve responsiveness to business requirements, enhance service to end users and ultimately drive innovation.

Definition (cont.)

The ISG Provider Lens™ study offers the following to IT decision makers:

The ISG Provider Lens™ study offers IT decision-makers:

- Strengths and weaknesses of relevant providers.
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness.
- A perspective on several markets, including global, the U.S., the U.K., Germany, Switzerland, France, the Nordic countries and Brazil.

This study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also leverage information from these reports to evaluate current vendor relationships and potential engagements.

Scope of the Report

The Public Cloud – Solutions & Service Partners 2020 Nordics report will assist buyers while reviewing a significant cloud transformation strategy and the capabilities of service providers in numerous geographies. Enterprise clients will also benefit from the study because it incorporates ISG's strengths in global sourcing advisory, contract knowledge databases, regional research, and expertise in technology ecosystems and innovations.

This study includes various reports from seven quadrants that cover cloud service models. Not all quadrants are covered in each geography. Coverage depends on provider responses, participation and relevance. Quadrants that are not covered in a region may be covered in future studies. The geographic report areas include the U.S., the U.K., Germany, Switzerland, the Nordics, France, Brazil and Latin America (LATAM).

The full set of quadrants covered in various geographic versions of this study are:

Definition (cont.)

- **Consulting and transformation for large accounts:** This quadrant assesses a service company's ability to provide cloud assessment, advisory, workload migration and cloud consulting for large businesses. The enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and revenues of more than $1 billion.
- **Consulting and transformation for midmarket:** In this quadrant, we assess a service company's ability to provide cloud assessment, advisory workload migration and continuous service transformation for public cloud service for medium-sized businesses. The enterprise client typically has fewer than 5,000 employees or generates less than $1 billion in revenue.
- **Governance, risk and compliance services:** In this quadrant, service providers such as consulting firms offer various frameworks, policies, processes and functions to ensure enterprise cloud workloads are run in a secure and compliant environment, regardless of location.
- **Managed public cloud services for large accounts:** This quadrant assesses a service company's ability to provide multi-cloud managed services for large businesses. The enterprises are subject to strict regulations that can complicate engagements. They typically have more than 5,000 employees and revenues of more than $1 billion.
- **Managed public cloud services for midmarket:** In this quadrant, ISG assesses a service company's ability to provide multi-cloud managed services for public cloud service for medium-sized business. The enterprise client typically has fewer than 5,000 employees or generates less than $1 billion in revenue.
- **SAP HANA infrastructure services:** This quadrant examines cloud infrastructures best suited to host the SAP software portfolio, with emphasis on SAP S/4HANA workloads and large-scale HANA databases. Participating vendors offer hyperscale IaaS — including infrastructure operations, facilities, provisioning and scaling capacity — on a pay-as-you-go model. IaaS tools should include data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and management dashboards. Tools can be part of the standard IaaS offering or be provided by partners on a marketplace.
- **Hyperscale infrastructure and platform services:** Suppliers in this quadrant provide virtual compute resources, middleware and software on a public cloud. Clients consume infrastructure and platform (micro)services as an on-demand and a web-centric service. Typical services in the IaaS segment are compute services, storage and network resources, where all are provided in a virtual or containerized software-defined fashion and rounded up by serverless architectures.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The Leaders among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising Stars are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Public Cloud - Solutions & Services - Quadrant Provider Listing 1 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
3stepIT	Contender	Market Challenger	Not in	Not in	Product Challenger	Not in	Not in
Accenture	Leader	Not in	Product Challenger	Leader	Not in	Not in	Not in
Alibaba	Not in	Not in	Not in	Not in	Not in	Not in	Contender
ATEA	Not in	Not in	Not in	Product Challenger	Not in	Not in	Not in
Atos	Product Challenger	Not in	Not in	Product Challenger	Not in	Not in	Not in
AWS	Not in	Not in	Not in	Not in	Not in	Leader	Leader
Basefarm (Orange Business Services)	Rising Star	Leader	Contender	Rising Star	Leader	Not in	Not in
BearingPoint	Not in	Contender	Not in	Not in	Not in	Not in	Not in
Birlasoft	Not in	Not in	Not in	Contender	Not in	Not in	Not in
Capgemini	Leader	Not in	Product Challenger	Leader	Not in	Not in	Not in
CGI	Leader	Not in	Market Challenger	Leader	Not in	Not in	Not in
Cognizant	Product Challenger	Not in	Not in	Product Challenger	Not in	Not in	Not in
Columbus	Not in	Not in	Not in	Not in	Product Challenger	Not in	Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 2 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Crayon	Product Challenger	Leader	Not in	Product Challenger	Rising Star	Not in	Not in
Cybercom	Not in	Product Challenger	Not in	Not in	Contender	Not in	Not in
Deloitte	Not in	Not in	Leader	Not in	Not in	Not in	Not in
DXC	Leader	Not in	Not in	Leader	Not in	Not in	Not in
Eficode	Not in	Rising Star	Not in	Not in	Not in	Not in	Not in
Enfo Group	Not in	Not in	Not in	Contender	Contender	Not in	Not in
Euvic	Not in	Leader	Not in	Not in	Leader	Not in	Not in
EY	Not in	Not in	Leader	Not in	Not in	Not in	Not in
Fujitsu	Leader	Not in	Not in	Leader	Not in	Not in	Not in
Google	Not in	Not in	Not in	Not in	Not in	Market Challenger	Leader
HCL	Leader	Not in	Product Challenger	Leader	Not in	Not in	Not in
IBM	Leader	Not in	Product Challenger	Leader	Not in	Product Challenger	Product Challenger
Infosys	Rising Star	Not in	Not in	Product Challenger	Not in	Not in	Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 3 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Itadel	Product Challenger	Leader	Not in	Product Challenger	Leader	Not in	Not in
itera	Not in	Product Challenger	Not in	Not in	Not in	Not in	Not in
KPMG	Not in	Not in	Leader	Not in	Not in	Not in	Not in
LTI	Product Challenger	Leader	Not in	Product Challenger	Leader	Not in	Not in
Microsoft	Not in	Not in	Not in	Not in	Not in	Leader	Leader
Nixu	Not in	Product Challenger	Not in	Not in	Product Challenger	Not in	Not in
NNIT	Market Challenger	Leader	Not in	Not in	Leader	Not in	Not in
Nordcloud	Market Challenger	Leader	Not in	Market Challenger	Leader	Not in	Not in
Oracle	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
OVHcloud	Not in	Not in	Not in	Not in	Not in	Contender	Contender
Proact	Not in	Contender	Not in	Not in	Market Challenger	Not in	Not in
PwC	Not in	Not in	Leader	Not in	Not in	Not in	Not in
SAP	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in

Public Cloud - Solutions & Services - Quadrant Provider Listing 4 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Sentia	Contender	Product Challenger	Not in	Not in	Product Challenger	Not in	Not in
Solita	Product Challenger	Leader	Not in	Product Challenger	Leader	Not in	Not in
Solteq oy	Not in	Not in	Not in	Contender	Contender	Not in	Not in
Sopra Steria	Product Challenger	Leader	Contender	Product Challenger	Leader	Not in	Not in
TCS	Leader	Not in	Product Challenger	Leader	Not in	Not in	Not in
Tech Mahindra	Product Challenger	Rising Star	Not in	Product Challenger	Leader	Not in	Not in
TietoEVRY	Leader	Leader	Market Challenger	Leader	Leader	Not in	Not in
T-Systems	Product Challenger	Product Challenger	Not in	Not in	Product Challenger	Not in	Not in
Visolit	Not in	Market Challenger	Not in	Not in	Contender	Not in	Not in
Wipro	Leader	Not in	Product Challenger	Leader	Not in	Not in	Not in

Public Cloud - Solutions & Services Quadrants

ENTERPRISE CONTEXT

Managed Public Cloud Services for Midmarket

This quadrant is relevant to midsized enterprises in the Nordics that are evaluating public cloud managed service providers (MSPs). In this quadrant report, ISG lays out the current market positioning of these providers in the Nordics and how they can address key challenges in midsized enterprises' infrastructure management in the public cloud. MSPs manage client workloads on third-party, public cloud, hyperscale environments so these enterprises can focus on other tasks.

To be successful in the current digital business environment, enterprises must take a unified approach to their technical infrastructure across public and private clouds. Using public cloud managed services can help enterprises to implement cloud-native solutions leveraging containers and serverless functions with single-touch DevOps integration. This helps enterprises achieve application modernization and cost optimization to run their applications at scale.

Enterprises will get the benefit of the MSPs' automation and AI capabilities to monitor their infrastructure to predict the failures and dependency of services in case of failures to reduce maintenance costs. Midsized enterprises have fewer complex requirements and smaller-scale projects than large enterprises, and they prefer providers with strong niche offerings with competitive pricing and high integration capabilities.

ISG sees that enterprises in the Nordics are getting more traction on SaaS adoption. Managed service providers can help enterprises in the Nordics comply with critical regulations, including data protection and data residency. Providers with a strong understanding of local context will be able to help enterprises manage their workloads in the public cloud environment.

IT leaders should read this report to better understand the relative strengths and weaknesses of managed service providers, as well as how MSPs' approaches to the market can impact enterprise public cloud strategies, improve business agility and reduce total cost of ownership.

Software development and technology leaders should read this report to understand the positioning of managed service providers and learn how MSPs' offerings can impact the ongoing development of an enterprise's software products.

Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of managed service providers in the Nordics.

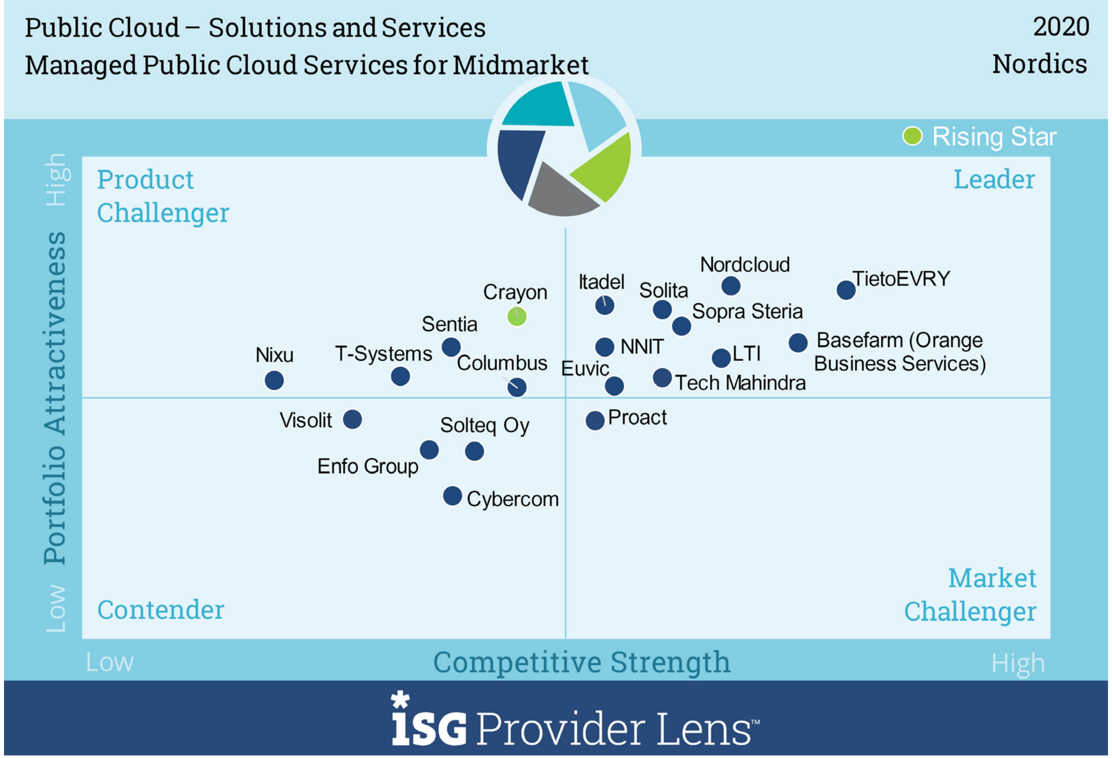
MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Definition

Public cloud managed services providers (MSPs) offer professional and managed services on top of third-party public cloud IaaS and PaaS hyperscale platforms. At a broad level, these services include provisioning, real-time and predictive analysis and monitoring, and operational management of the customer's public and multi-cloud environments, with the aim of maximizing the performance of workloads in the cloud, reducing costs, and ensuring compliance and security. Typically, MSPs offer specially developed or licensed cloud management platforms and tools are used to serve customers with optimal automation and to provide the necessary transparency about the managed cloud resource pool in terms of capacity utilization and costs, including self-service administration.

Services provided typically include:

- Management and monitoring services around CPU, storage, memory, databases, and operations of microservices, virtual machines and containers.



Source: ISG Research 2020

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Definition (cont.)

- Operation system, middleware and application upgrades and patching services.
- Service portal for expense management (chargeback and showback) and identity management or IT service management.
- Governance and compliance management.
- Support services such as incident management, configuration, security services and automation setup.

Eligibility Criteria

- Operational excellence and well-defined professional services.
- Experience in building and managing public and multi-cloud environments.
- Expertise in configuration management of platforms and systems as well as containers.
- Support for software code development and for cloud-native and legacy system integration.
- DevOps, API-enabled automation and cloud analytics experience.
- Mature security processes.
- Support for different client roles such as IT technicians and developers.
- Partnerships with relevant public cloud providers and respective managed service provider (MSP) certificates for AWS, Azure, GCP or others.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Eligibility Criteria (cont.)

- To qualify for the following hyperscale partnerships, MSPs typically must showcase customer cases, demonstrate a certain amount of consumption-driven and recurring revenue, participate in joint business planning sessions, and pass multiple certifications and audits to prove their skills and knowledge:
  - Azure CSP 1 or 2 – silver, gold or expert partners: Administrator, Solutions Architect, Developer, DevOps/Security/AI/Data Engineer, Cloud Platform and domain specialization.
  - AWS registered, advanced, or premier partners: Solution Architect, DevOps Engineer, Developer, SysOps Administrator, Migration Consulting/Delivery and domain specialization.
  - GCP registered, premier partners: Cloud Architect, Data Engineer, DevOps competency and domain specialization.

Observations

Over the last couple of years, the adoption of cloud services has been increasing across Nordic countries. This increase in cloud adoption is primarily due to the need for a more Agile, scalable and automated IT landscape. Midsized customers seek a system integrator who can help to consolidate and provide an integrated cloud management platform. The cloud management platform should provide one-touch and zero-touch issue resolution capabilities. Also, the platform should have out-of-the-box integration capabilities with third-party tools ecosystem. With the increase in automation, clients expect providers to optimize resources with a balanced automated approach, from horizontal IT support to their DevOps team.

ISG foresees a continuing surge in automation-led platform adoption among Nordics clients. During the COVID-19 pandemic, there has been a huge demand from clients for remote enablement. They want an IT workload management platform to automatically control scalability with right optimization model. There are niche system integrators, which are emerging with niche frameworks, accelerators and platform capabilities to meet client requirements.

This study has assessed 50 providers and classified 21 in this quadrant. Ten are Leaders and one is a Rising Star.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Observations (cont)

- **Basefarm** has been recognized for its best-of-breed product and service portfolio following its acquisition by Orange Business Services.
- **Euvic** solutions and services are modular, so they fit client's requirements.
- **Itadel** has achieved a number of hyperscaler accreditation and industrial competencies to work across the private and public sectors in the Nordic market.
- **LTI** provides modular and integrated cloud managed service, including design, deployment, integration and operations in the region.
- **NNIT** has about 3,500 professionals with a strong domain knowledge in life sciences.
- **Nordcloud** has a robust set of competencies and MSP accreditation from giant cloud service providers. It has a dedicated focus on managing cloud-native, business-critical infrastructure.
- **Solita** is an official reseller and solution provider of AWS services to both the private and public sectors.
- **Sopra Steria** offers mature cloud operations with robust lifecycle services to helping clients scale and accelerate.
- **Tech Mahindra's** cloud center of excellence enables clients to accelerate their cloud journey through its cloud platforms and technologies.
- **TietoEVRY** holds a deep domain experience in the public and private sectors across verticals.
- **Crayon** is proficient in cloud economics and its provision of managed services meets stringent Microsoft requirements around technical expertise and customer delivery.

TECH MAHINDRA

Overview

Tech Mahindra provides comprehensive cloud services in the Nordic region. Its clouds services include cloud strategy, transformation, migration, integrated cloud managed services and industry domain-specific solutions. Over the last few years, the firm has invested in cloud IPs and frameworks along with continuous investment in the region. The firm has developed a strong network of alliances with leading technology partners, tools partners and major cloud service providers.

Strengths

Application portfolio assessment and rationalization: Tech Mahindra's Passport NxT is a comprehensive framework that helps clients analyze the maturity and readiness of application workloads for migration to the public cloud. The firm's proprietary framework involves scoring the workloads and infrastructure maturity on various parameters.

Integrated platform-centric DevOps solutions: The company's hybrid cloud management platform, mPAC, helps manage cloud-native and microservices-based application architectures while providing an expanded portfolio of functionality that also facilitates DevOps methodologies.

Dedicated Google Cloud center of excellence: Tech Mahindra's cloud center of excellence enables clients to accelerate their cloud journey through its cloud platforms and technologies. Its innovation center delivers a combination of personalized and self-service experiences that help clients simplify and modernize their IT landscape.

Caution

Tech Mahindra should focus on increasing its client base across verticals in the midmarket.

The organization should rebrand its marketing strategy to build a stronger perception related to public cloud consulting and transformation among the advisor, analyst and CXO communities.

2020 ISG Provider Lens™ Leader

Tech Mahindra has improved its overall cloud portfolio services. Its cloud transformation solutions with niche mainframe services enable clients to drive their cloud transformation journeys.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ 2020 – Public Cloud - Solutions & Services" analyzes the relevant software vendors/service providers in the Nordics market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Public Cloud - Solutions & Services market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

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At ISG, Manoj Chandra Jha is primarily responsible for research projects and working on the ISG Provider Lens™ (IPL) program. He actively contributes to gathering service provider intelligence through both primary and secondary research. He is responsible for writing thought leadership reports and papers on briefings provided by the service providers. In addition to these, Manoj also writes blogs on trending topics, specifically on cutting-edge technology. Manoj has executed several client requests for research and consulting assignments across industries, predominantly in IT, manufacturing and insurance. He has handled client communications for the team, managing the client right from onboarding to understanding their custom research requests to scheduling briefing calls. Along with this, he has been closely involved with the quadrant studies around cloud services and data center outsourcing market.

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Senior Analyst

Prakash N is a senior analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Private Hybrid Cloud Data Center, Public Cloud Transformational Services and Cloud Native – Container Services. His area of expertise is in cloud, data center, public cloud platforms and cloud native services. He has developed content for Provider Lens™ in the areas of private and public Cloud. Prakash has authored industry and service line focused reports on automotive, retail and CPG that focus on the IT outsourcing market. Prakash develops content from an enterprise perspective and authors the global summary report. He also collaborates with advisors and enterprise clients on ad-hoc research assignments and writes articles about niche technologies, market trends and insights.

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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